## Revisions Explained

Revisions are *modified* copies of an electronic document.

You can create multiple revisions of an electronic document and each of these will be attached to the same record in **TRIM (HPE Records Manager)**.

When you choose to edit an electronic document, after it is saved and closed, it will be returned to TRIM with the current document being automatically saved as a previous revision.

## Creating a New Revision

1. In **TRIM** search or navigate to a document
2. Highlight the document
3. Right Click > **Edit**
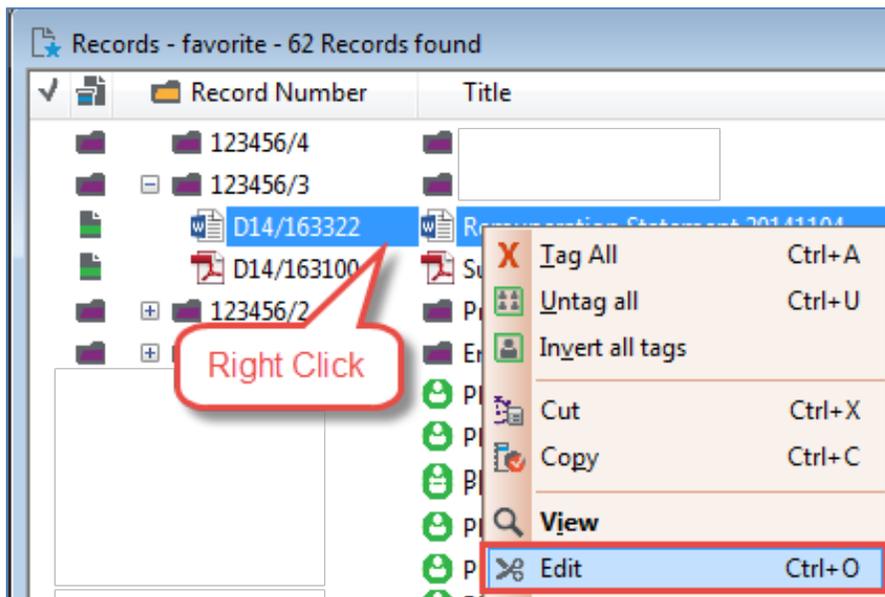
4. The document will open in the authoring application (e.g. word, excel), and will be checked out to you. Make the relevant changes to the document
5. Select **Save** (not Save As), and **close** the document

Previous Revisions

1. Highlight the document
2. Right-click > **Properties**
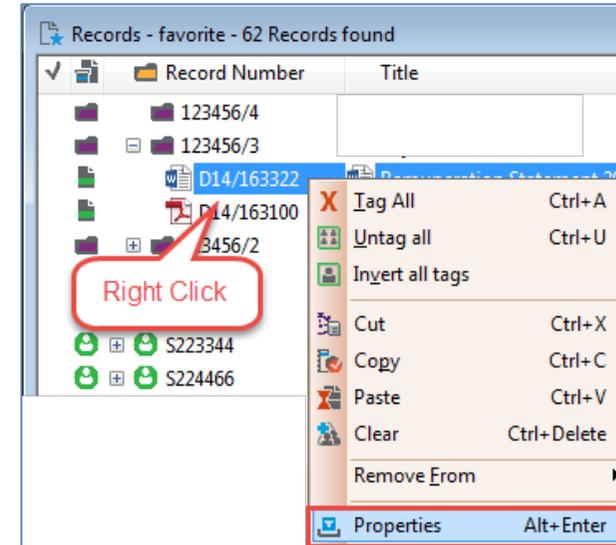
3. In the **Properties** window
4. Select the **Revisions** Tab to view the list of previous document revisions
5. Right-click on a revision and select View
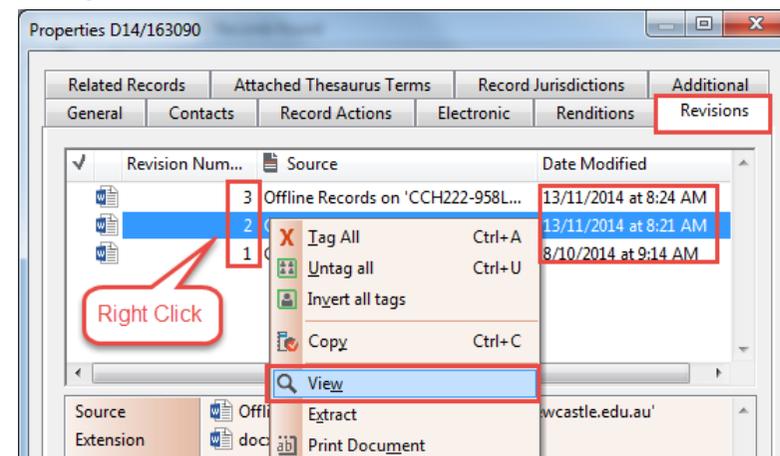
Promoting a Revision

1. Right-click on the document and select **Electronic > Promote Revision**.
2. Highlight the revision you want to promote and select **OK**.

This is now the most current Revision of the document.
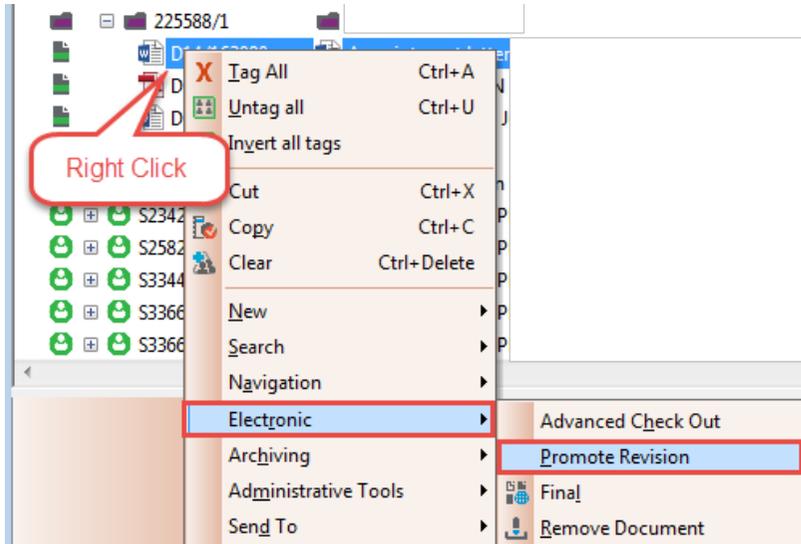
Versions Explained

Versions are basically *new* copies of an electronic document that use the latest revision of that document.

You can create multiple versions of an electronic document and each will be registered as a separate record in **TRIM** numbered with [V1], [V2] etc.

You can select what information of the current record the new version will retain.

Version Control

Many documents require version control, such as; standard operating procedures, policies, externally visible documents, procedures, frequently asked questions, etc.

Version control provides the ability to have a version that is current for general dissemination - current version - but you will still be able to have revisions and version

control for a document not yet ready for general dissemination against the same record number version.

For example, consider a retail outlet's price list. Day to day, customers will use the current price list. The marketing staff draft next year's price list.

For this, they create a new version of the price list and subsequent revisions for it.

So, the current version is actually the currently published version which translates in **TRIM** concepts to the most recent version that was made Final

- The version that has been published and finalised represents the current version in the scenario described above.
- The new version that has been created is still considered a work in progress until it is finalised and published, as well. Therefore, **TRIM** provides navigation and view pane options called

All Versions - will display all versions regardless of their edit status

**Current Version** - will display the last version that has a finalised status

Latest Version - will display the last version that has been created regardless of its edit status

Creating New Versions

1. In **TRIM** search or navigate to a document
2. Right-click on the document and select **New > New Version**
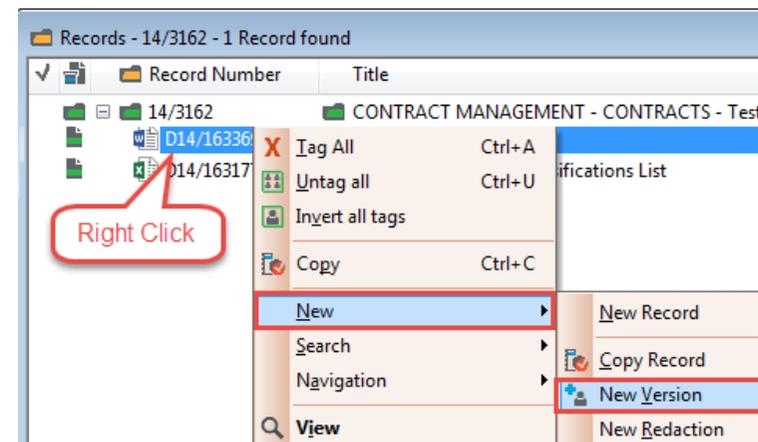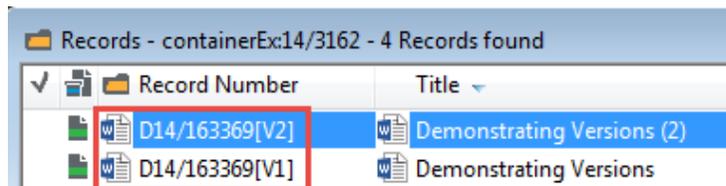
3. In the **Create New Version** window un-select any fields that are not required

4. Select **OK** to create the new version of the document
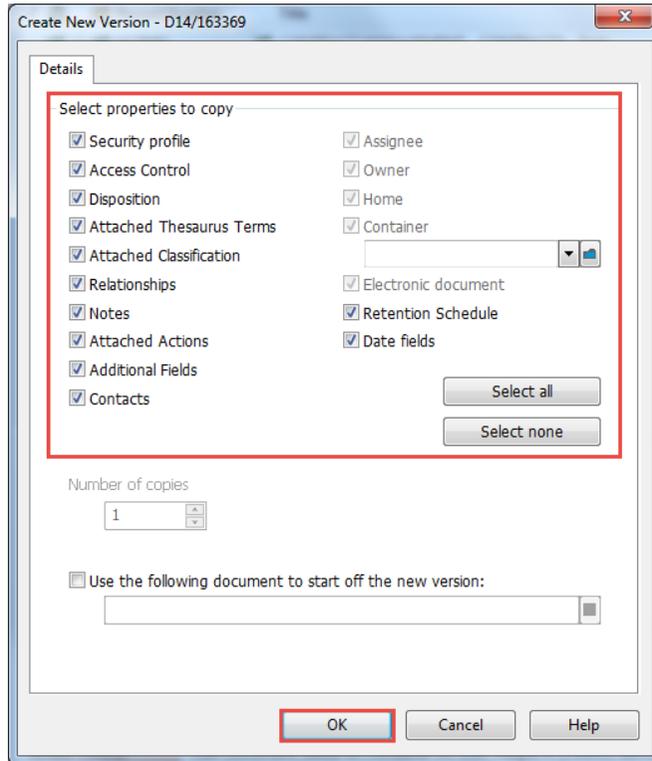
The previous version of the document will be finalised & no further changes can be made to it

The record numbers will be the same however they will have a suffix of [V1], [V2], [V3] and so on. You can amend the title of each of the versions as required.
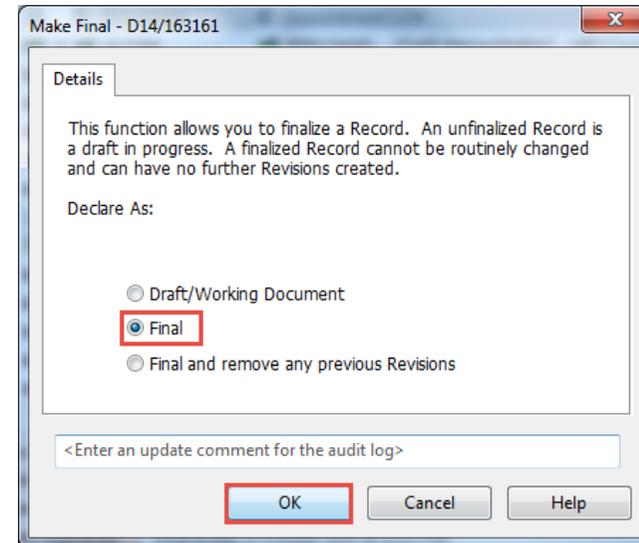

Finalising Documents

1. In **TRIM** search or navigate to a document

2. Right-click on the document and select **Electronic > Final**
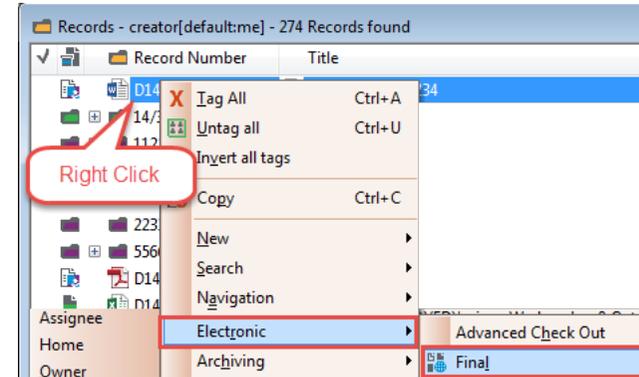
3. Select **Final** in the **Make Final** window, then select **OK**

The document is now finalised and cannot be edited