


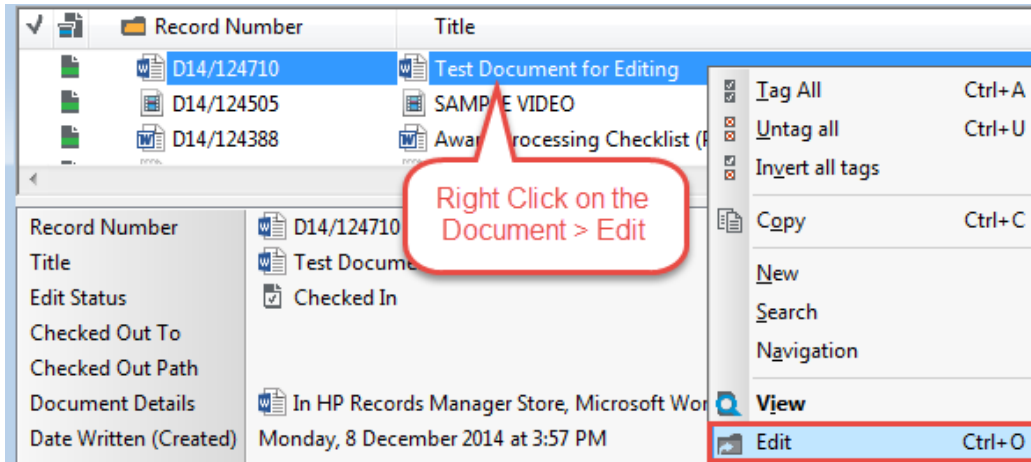
Purpose

This reference guide is designed to assist users by explaining the process TRIM follows when you edit a document. This guide highlights that TRIM only creates a revision when you close and save the document you are editing. Using the Save icon in Word, Excel and PowerPoint etc. will NOT save your changes into TRIM until you have closed the document and it checks back in.

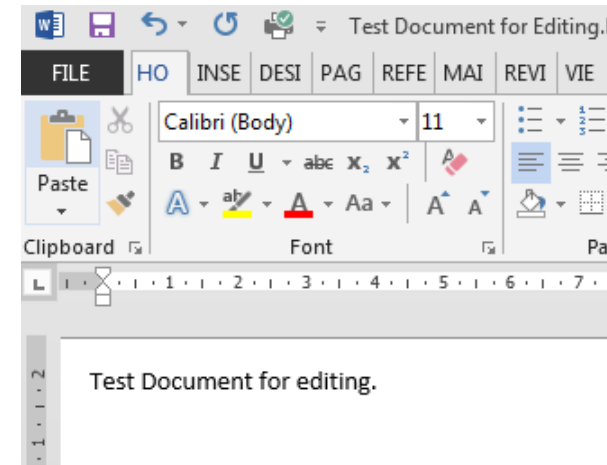
Editing Documents

1. In **TRIM** (HPE Records Manager) search or navigate to a document
2. Highlight the document and select **Edit icon** on the toolbar 

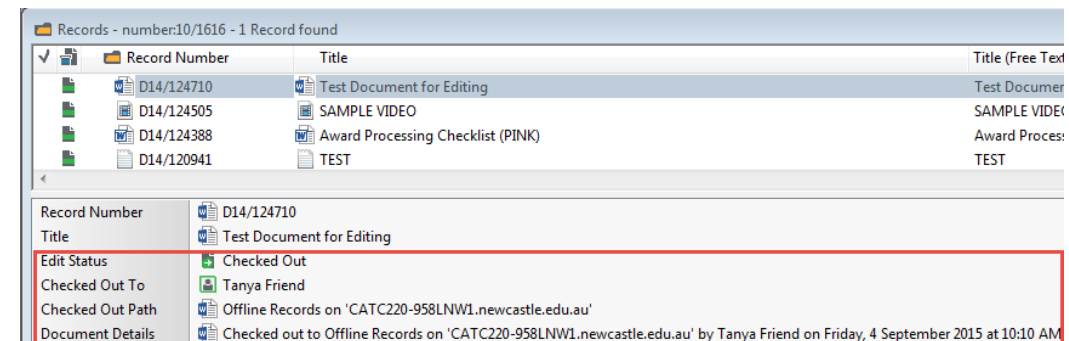
Or Right Click on the Document > Edit



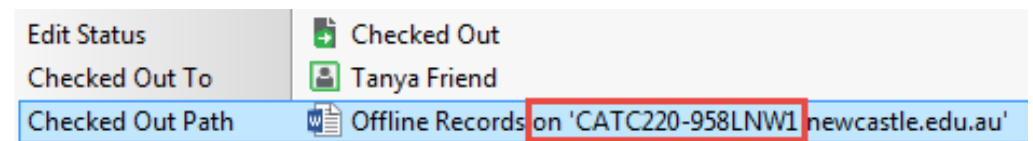
3. The document will open in the authoring application (e.g. MS Word)



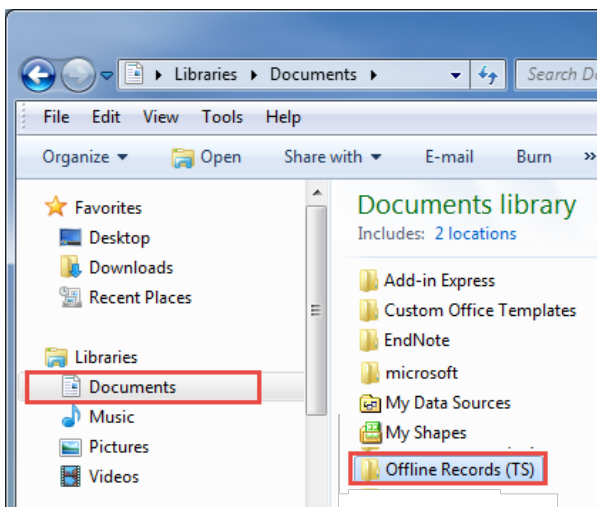
4. TRIM will recognise that the document is checked out



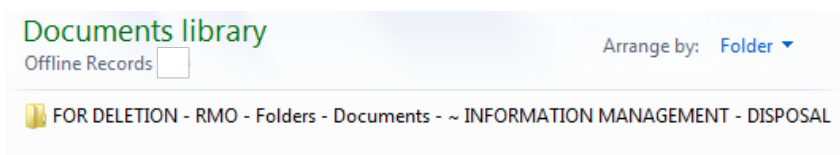
Note! The most important thing to remember when you are editing a document is that you have **effectively taken it out of TRIM** and are working with it in the native application (e.g. MS Word) on your **local machine**.



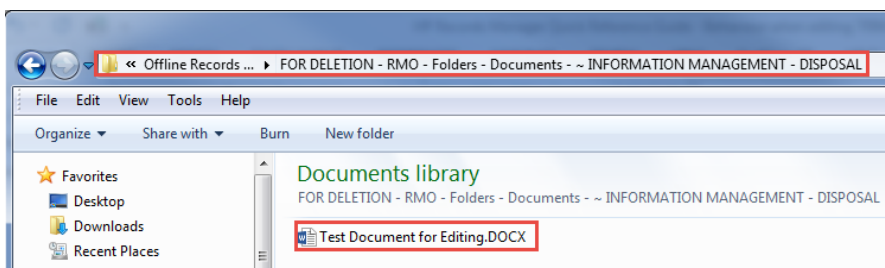
The document will be visible in Offline Records within your 'My Documents' folder



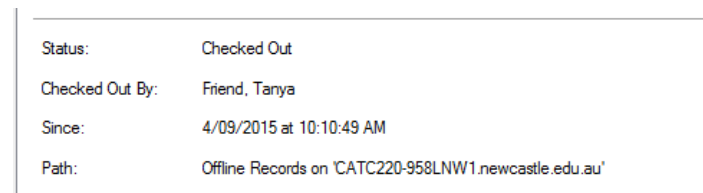
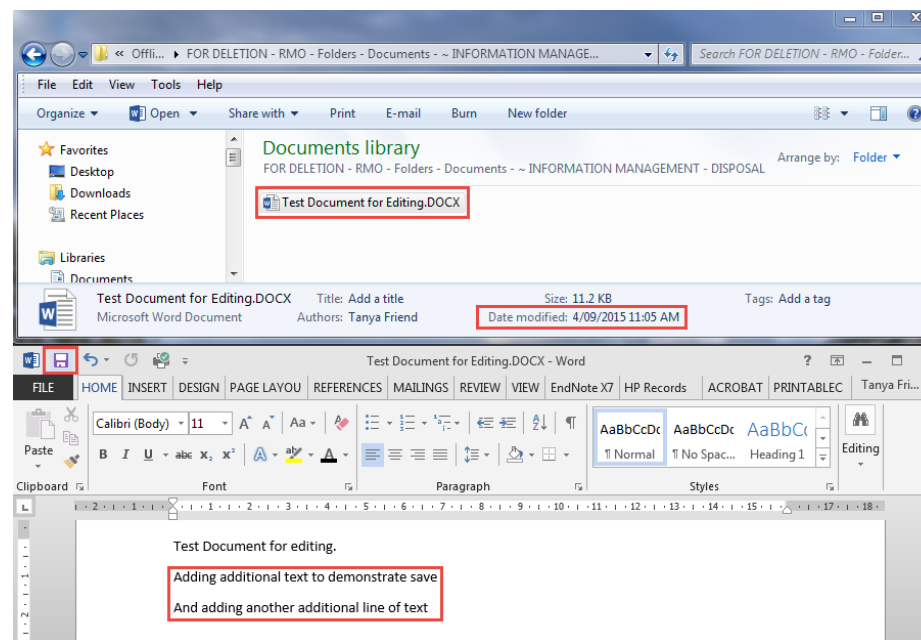
Note! Under the Offline Records (TS) a folder will display with the name of the TRIM file



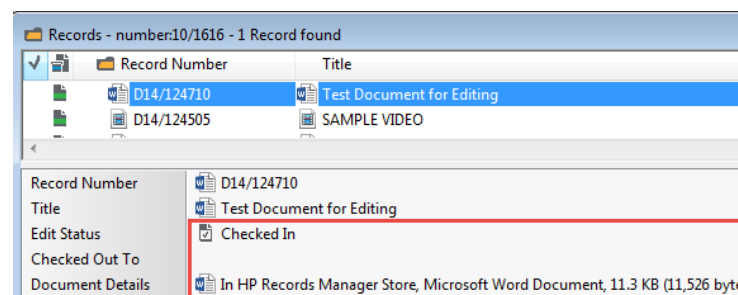
The document will be visible within that folder



Note! As you are working on the document if you click the save icon or press Ctrl + S you are saving the document to your **local machine only – NOT to TRIM.**



TRIM will NOT create a revision and capture the changes until the document is closed and checked back in.



If you are working on a **Laptop** and you are connected to the network via a docking station ***** DO NOT** remove your **Laptop** from the docking station ******* if you have documents checked out

If your Laptop **loses connection** to the **Network** and you have documents checked out, **you may lose the changes.**

It is best practice to **CLOSE** and **SAVE** your documents about every 1 hour to create a new revision in TRIM.

When the document is checked back into TRIM it will disappear from Offline Records

