

Revisions Explained

Revisions are modified copies of a TRIM9 document.

When you modify/edit a document and save that updated document to TRIM9, there isn't a new record which gets created, but instead the updated document gets saved on top of the previous copy of that document.

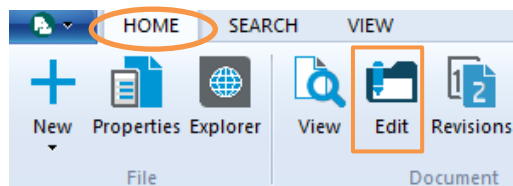
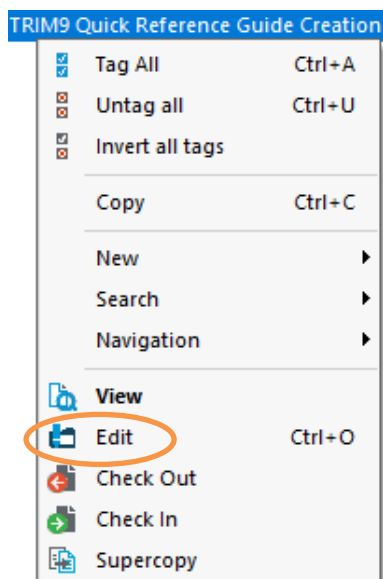
The current copy of a particular document is known as the Current Revision. All previous/old copies of that particular document are known as Previous Revisions. There are numerous ways to create a new Revision in TRIM9. These are detailed below:

Creating a New Revision by Editing a Document in TRIM9

In this Quick Reference Guide, the term document is used to refer to many different file types such as Word documents, Excel spreadsheets, PowerPoint presentations and PDF. To edit a document in TRIM9:

1. Locate the record which you want to edit.
2. Choose your preferred method from the two listed below, and perform the associated steps for that method:

Right-click on the record and select **Edit** **OR** Click on the record once to select it. Then select the **HOME** tab, and then click the **Edit** button:



3. The document will open in its native application (E.g. Microsoft Word) and will automatically be '**Checked Out**' from TRIM9, as shown by the 'Edit Status' field in the **View Pane**:

Record Number	D20/34775
Title	Example Document - TRIM9 Quick Reference Guide Creation
Container	20/516: INFORMATION MANAGEMENT - IMPLEMENTATION - TRIM9 Upgrade
Alternative container	
Related records	Copy of: D20/34427: Example Document - TRIM9 Quick Reference Guide Creation
Creator	Bryce Rheinberger
Author	Bryce Rheinberger
Date Written (Created)	Monday, 1 June 2020 at 4:05 PM
Date Registered	Wednesday, 3 June 2020 at 4:19 PM
Date Modified	Monday, 1 June 2020 at 4:05 PM
Edit Status	Checked Out
Checked Out To	Bryce Rheinberger
Checked Out On	Wednesday, 3 June 2020 at 4:21 PM
Revision Number	1

Hint: The 'Checked Out To' and 'Checked Out On' fields in the **View Pane** will tell you when the document was checked out, and who checked it out.

4. Work on the document the same as you would if you were working from your desktop or shared drive. Once you have finished editing, save the document and close it.
5. The document should check back in automatically. You will notice that the **Revision Number** will increase by one, and the **Edit Status** will change back to '**Checked In**'.

Edit Status	Checked In
Checked Out To	
Checked Out On	
Revision Number	2

Hint: It is good practice to check the 'Edit Status' field in the **View Pane** to ensure the document did indeed automatically check back in. If it remains '**Checked Out**', you can force the check in by:

Right-click the document → **Check In** → **Offline Records** → **Make a new revision** → **OK**

Creating a New Revision by Dragging and Dropping to TRIM9

If you have a document which has been updated outside of TRIM9 (E.g. you sent a TRIM9 document to someone who doesn't have TRIM9 access so they could edit it) you can add this updated document to TRIM9 by dragging it into TRIM9 and dropping it on top of the existing document.

Note: If you need to have a TRIM9 document updated outside of TRIM9 (either by yourself whilst you don't have UON network access or by a colleague who doesn't have TRIM9 access), it is best practice to check the document out of TRIM9 before sending it to them. This prevents another TRIM9 user from editing the document in TRIM9 whilst you (or a colleague who doesn't have TRIM9 access) are editing the document outside of TRIM9.

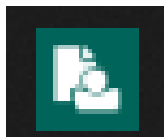
To check out a document from TRIM9:

Right-click the document → **Check Out** → **Offline Records** → **OK**

To drag and drop a new Revision to TRIM9:

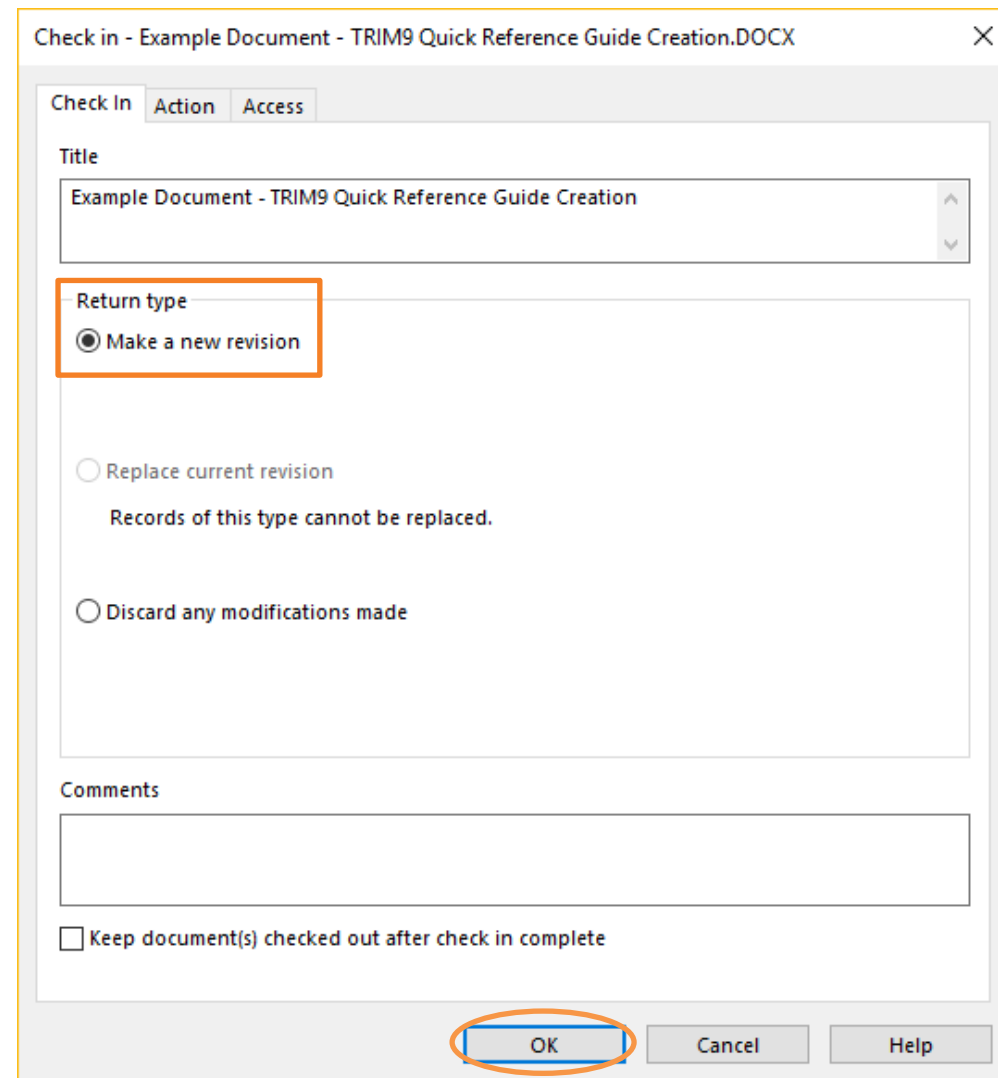
1. Locate the record which you want to add a new Revision to.
2. Navigate to where the updated document is currently stored (Desktop, Windows Explorer, email etc.).
3. Click on the updated document and drag it across to TRIM9 (**do not release your mouse button yet**):

Hint: Should you only have one screen; you can drag the document onto your TRIM9 icon (refer below) in your Windows taskbar at the bottom of your computer screen which will display the TRIM9 window for you:



4. While continuing to hold the mouse button down, drag the updated document onto the record you want to add a new Revision to until it highlights blue, then release the mouse button.

5. This will display the 'Check in' window. Ensure **Make a new revision** is selected as the 'Return type' then click **OK**:



Check in - Example Document - TRIM9 Quick Reference Guide Creation.DOCX

Check In Action Access

Title

Example Document - TRIM9 Quick Reference Guide Creation

Return type

☒ Make a new revision

☐ Replace current revision

Records of this type cannot be replaced.

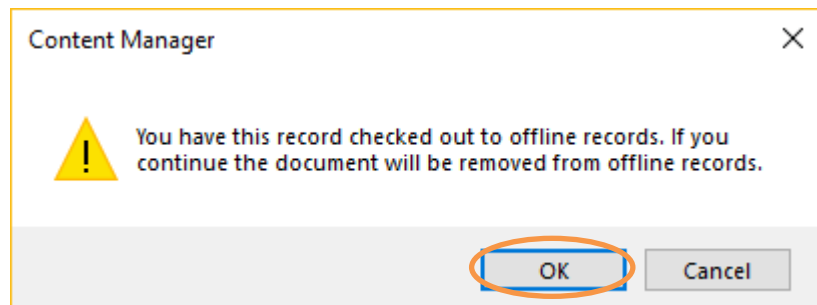
☐ Discard any modifications made

Comments

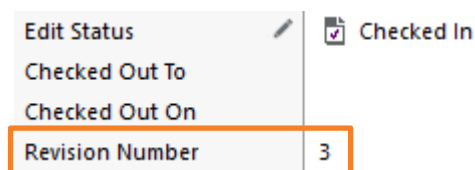
☐ Keep document(s) checked out after check in complete

OK Cancel Help

6. The below window would appear if you had the document checked out to your Offline Records. If it appears, click **OK** to proceed:



7. The updated document will now be the Current Revision in TRIM9, and the 'Revision Number' will increase by one:

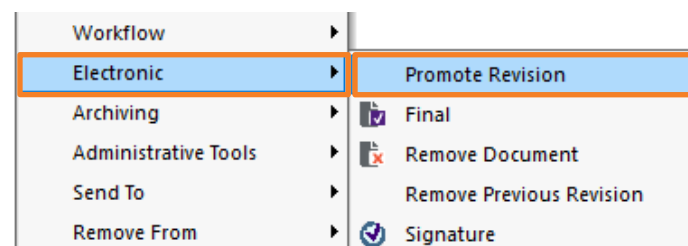


Creating a New Revision by Promoting a Revision

If a TRIM9 document has more than one Revision, it is possible to promote a Previous Revision so that it becomes the Current Revision. For example, you may need to do this if changes had been made to a document which were incorrect, and you therefore wanted to roll back to a Previous Revision of the document from prior to when the incorrect changes had been made.

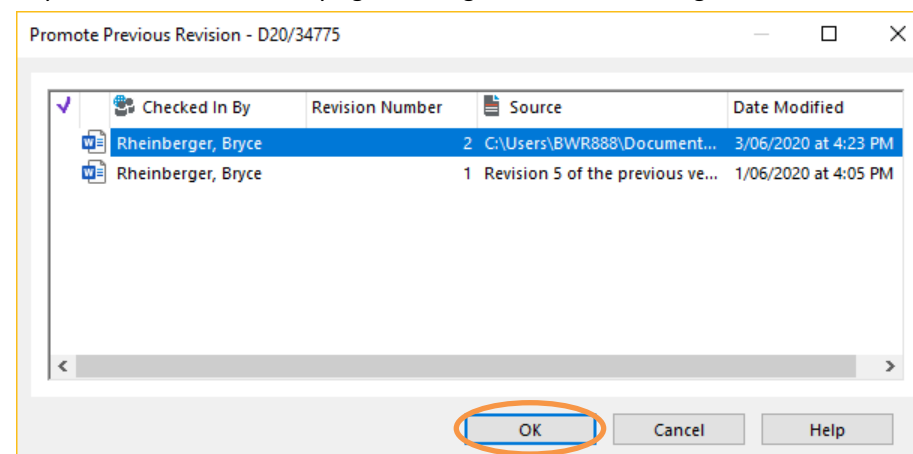
To promote a Revision:

1. Locate the document for which you want to promote a Revision.
2. Right-click on the document, hover your mouse cursor on **Electronic**, then select **Promote Revision**:

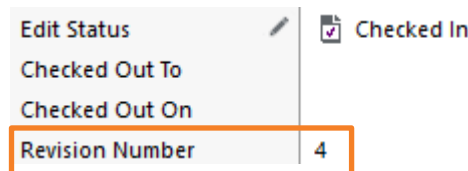


3. The '**Promote Previous Revision**' window will appear. Select the Revision you want to promote by clicking on it once, then select **OK**:

Hint: If you're not sure which Revision is the correct one to promote, you can view any of the listed Revisions by right-clicking on one and selecting **View**:



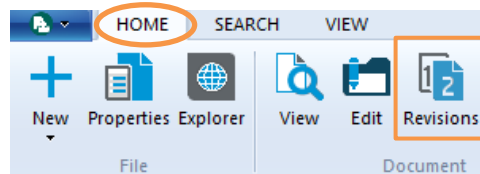
- The Revision you selected will now be the Current Revision, and the 'Revision Number' will increase by one:



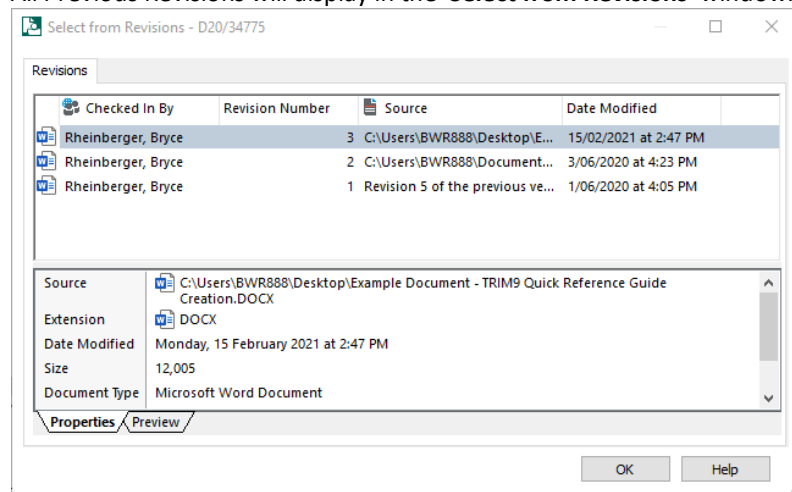
Accessing Previous Revisions

To access previous Revisions of a record:

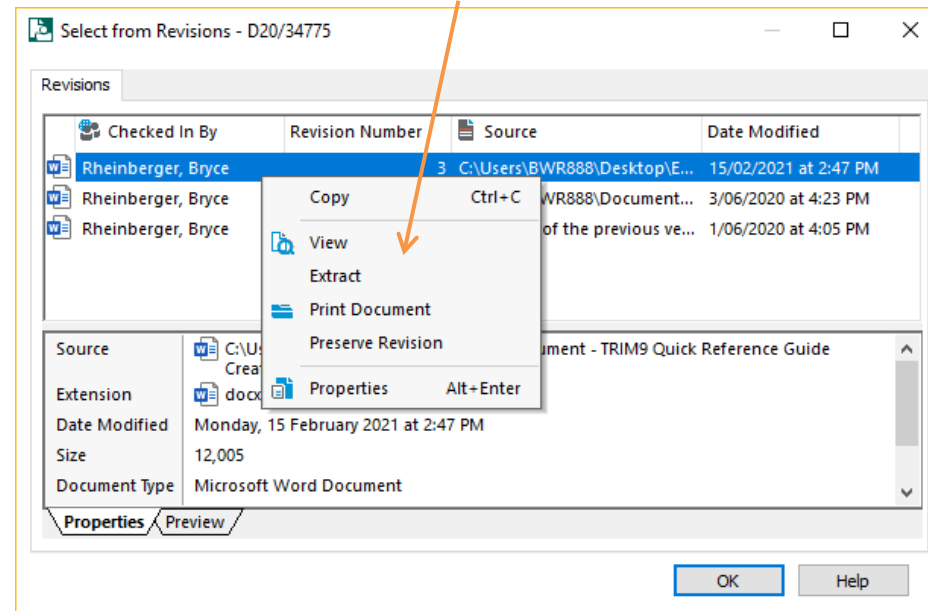
- Locate the document for which you want to access the Previous Revisions.
- Click on the record once to select it. Then select the **HOME** tab, and then click on the **Revisions** button:



- All Previous Revisions will display in the 'Select from Revisions' window:



- Right-clicking on a Revision will display your options for working with these Previous Revisions. Most often used are **View** and **Extract**, and these are explained below:



View - Selecting **View** will open the selected Revision in its authoring application (e.g. Microsoft Word). This allows you to view the Revision, as well as perform all other actions usually available to you in that authoring application such as 'Print' and 'Save As'.

Extract - Selecting **Extract** will allow you to choose a location on your computer to extract a copy of the selected Revision to.

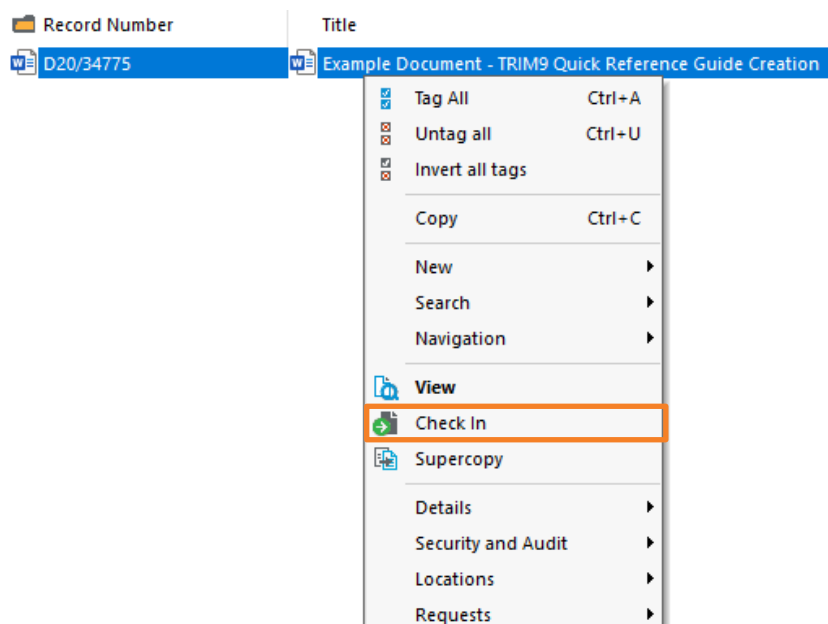
Checking In Without Making a New Revision

There may be instances where you have checked out a document intending to edit it, but then didn't actually make any changes. Or there may also be instances where you have inadvertently checked out a document. The 'Edit Status' and 'Checked Out To' fields in the **View Pane** will show you if a document is checked out to you:

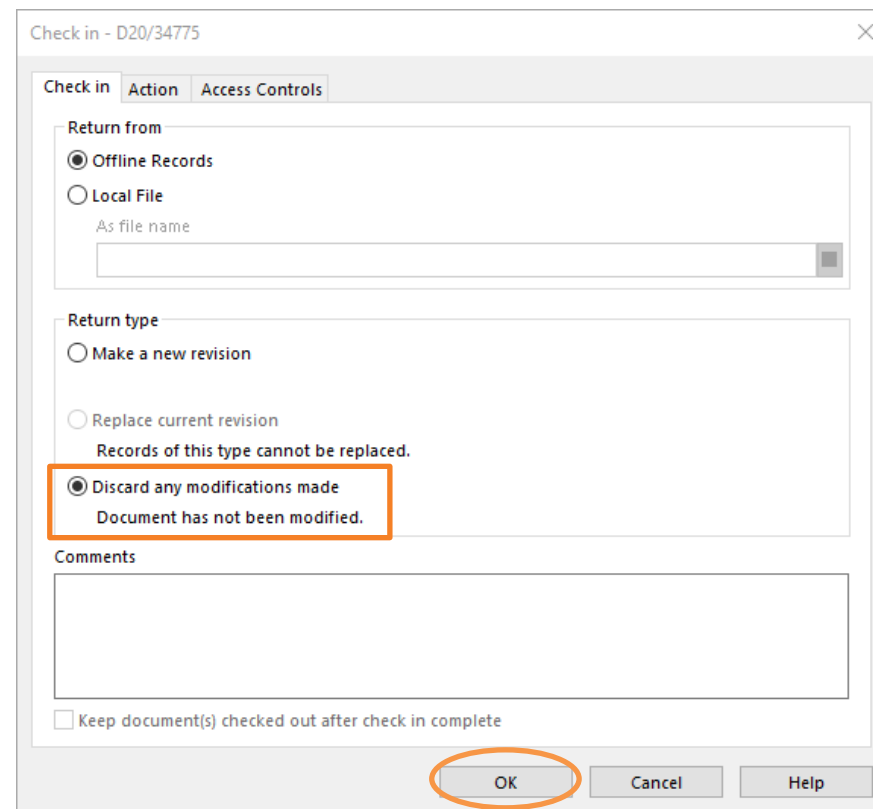
Edit Status	Checked Out
Checked Out To	TRIM Trainee
Checked Out On	Tuesday, 16 February 2021 at 10:52 AM
Revision Number	4

Should you need to check in a document which is currently checked out to you, but you don't want to update the document in TRIM9, below are instructions on how to do so:

1. Locate the document which you want to Check In to TRIM9.
2. Right-click on the document and select **Check In**:



3. Ensure **Discard any modifications made** is selected, then click **OK**:



The screenshot shows a dialog box titled 'Check in - D20/34775'. It has three tabs: 'Check in', 'Action', and 'Access Controls'. The 'Check in' tab is active. Under 'Return from', 'Offline Records' is selected. Under 'Return type', 'Discard any modifications made' is selected, and a note below it says 'Document has not been modified.' The 'OK' button is highlighted with an orange circle.

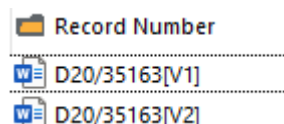
4. The 'Edit Status' will change back to **Checked In**, and the 'Revision Number' will remain the same:

Edit Status	Checked In
Checked Out To	
Checked Out On	
Revision Number	4

Versions Explained

Versions are basically **new** copies of a document for which version control is required. If you create a New Version for a document, by default the Current Revision of that document will become Revision 1 for the New Version of that document.

You can create multiple Versions of a document and each will be registered as a separate record in TRIM9. The Record Numbers for each Version will be the same, except that they will be numbered with [V1], [V2] etc. at the end of the Record Number:



When you create a New Version for a document, the document which was the Current Version will become Finalised (if it wasn't Finalised already).

Version Control

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

Version control provides the ability to have a Version that is current for general dissemination (Current Version) - but 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. However, at some point, the marketing staff will need to draft next year's price list. For this they create a New Version of the current price list. Each time they work on and update this New Version of the price list in TRIM9 they will subsequently create a new Revision for it.

So, the Current Version (this year's price list) is actually the currently published Version which translates in TRIM9 concepts to the most recent Version that was made Final. I.e.:

- The Version that is Finalised and currently being used represents the Current Version in the scenario described above.
- The New Version that has been created but is still being updated and worked on is considered a work in progress until it is Finalised and published.

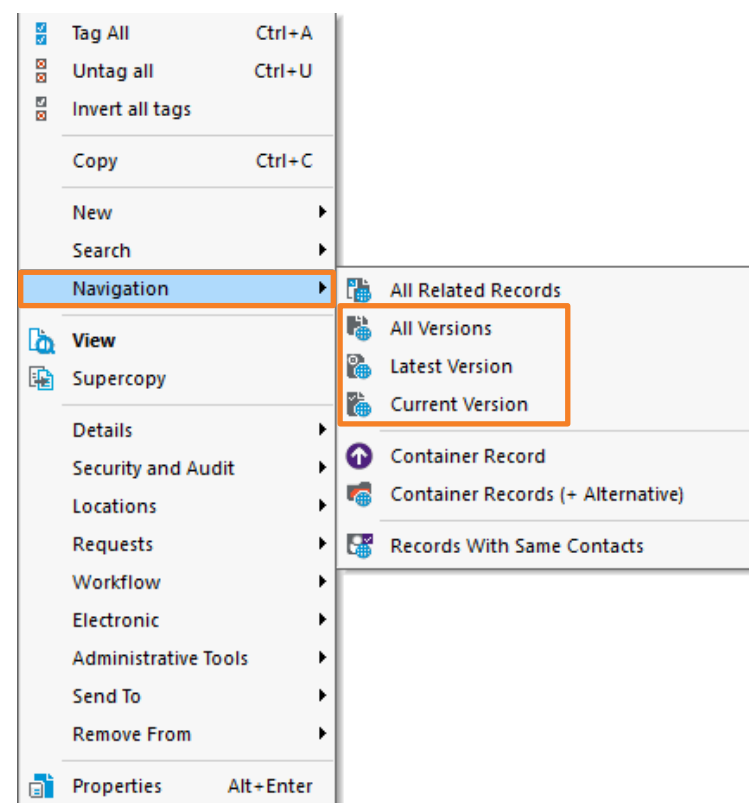
To assist with working with and navigating to the different Versions of a document, TRIM9 provides navigation options in the right-click menu:

1. Right-click on a document which has multiple Versions, hover your mouse cursor on **Navigation** then select your required option :

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

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

Current Version - will display the last Version that has a Finalised status

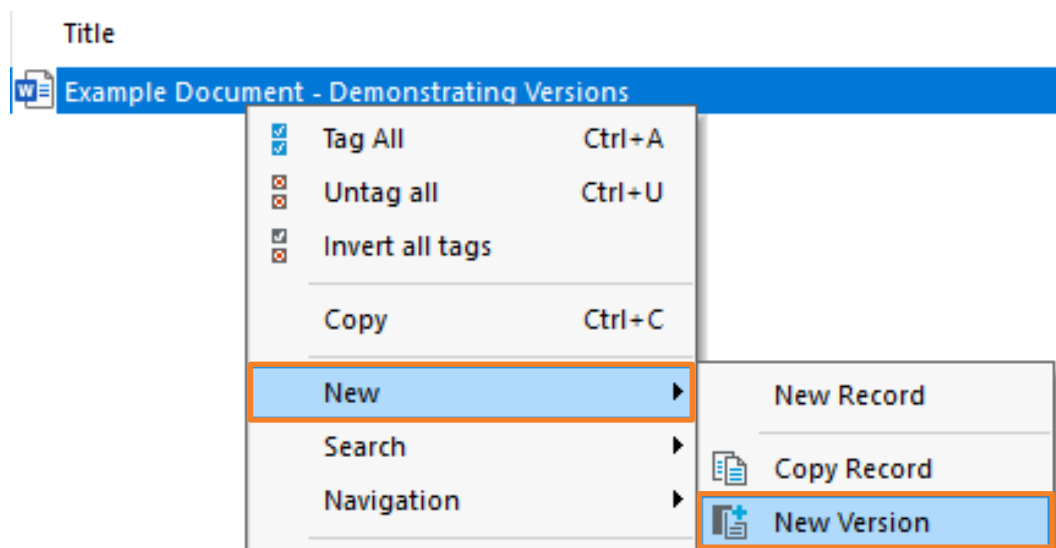


Note: Depending on which Version of a document you right-clicked on, you may not always see all these options listed. E.g. If you right-click on the Current Version of a document, **Current Version** won't be an option under the right-click → **Navigation** menu.

Creating New Versions

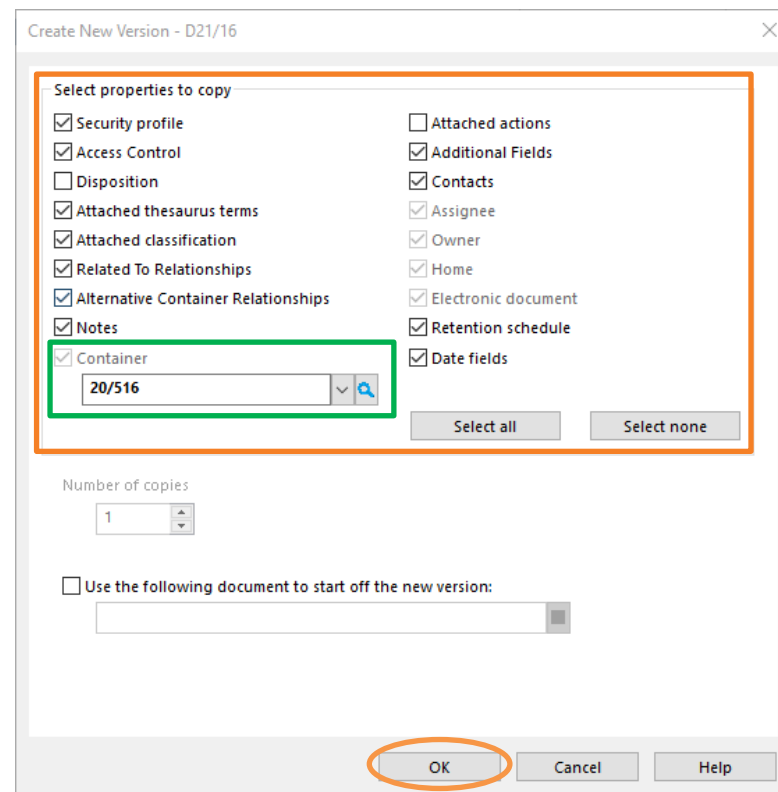
Should you need to create a new Version for a document:

1. Locate the document which you want to create a New Version for.
2. Right-click on the document and select **New → New Version**:



3. The 'Create New Version' window will display. Tick / untick the 'properties to copy' as required, then select **OK** to create the New Version of the document.

Hint: By default, the New Version will be created inside the same container as the Current Version. If necessary, you can create the New Version in a different container by updating the 'Container' field as appropriate:



4. The Previous Version of the document will be Finalised, and 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:

