Viewing Records

There are a few different ways to view a record (Word document, Excel spreadsheet, PDF, email, photo etc.) in TRIM9. All these methods are detailed below to assist you in determining your preferred method for viewing records:
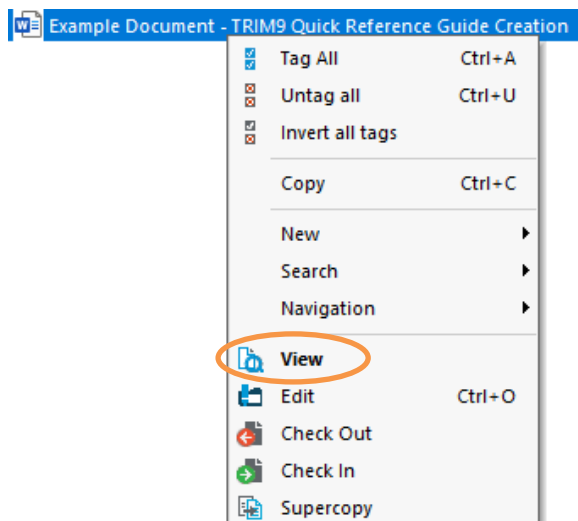
1. Locate the record which you want to view.

2. Refer methods below:

Method 1
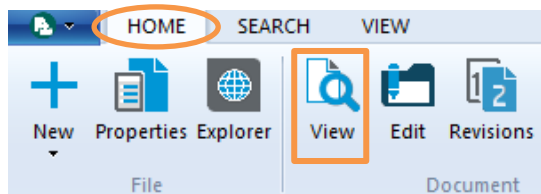
- Double-click the record to view it.

Method 2

- Right-click the record and select **View**:

Method 3

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

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.

How to Edit a Document

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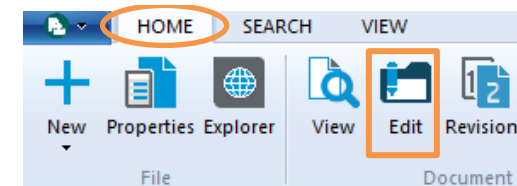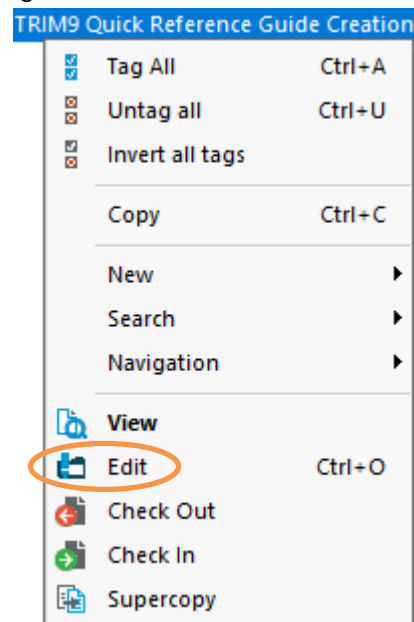
3. The document will open in its native application (E.g. Microsoft Word) and will automatically be **'Checked Out'** from TRIM, as shown by the 'Edit Status' field in the **View Pane**:

Record Type	ELECTRONIC DOCUMENT
Record Number	D20/34775
Title	Example Document - TRIM9 Quick Reference Guide Creation
Container	20/516: INFORMATION MANAGEMENT - IMPLEMENTATION - TRIM9 Upgr
Alternative container	
Related records	Copy of: D20/34427: Example Document - TRIM9 Quick Reference Guide Crea
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
Number of Pages	
Document Details	Checked out to Offline Records on 'CCH239-1DZ3PV2.newcastle.edu.au

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.

5. The document will 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: To access previous Revisions of a record:

1. Click on the record once to select it. Then select the **HOME** tab, and then click on the **Revisions** button: