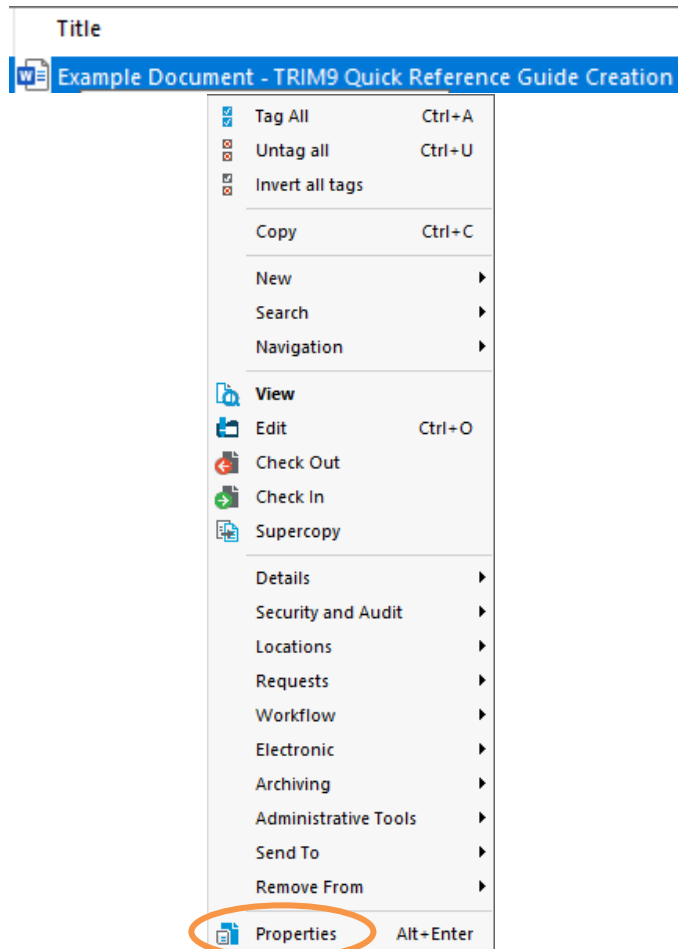


Changing the Title of a Record

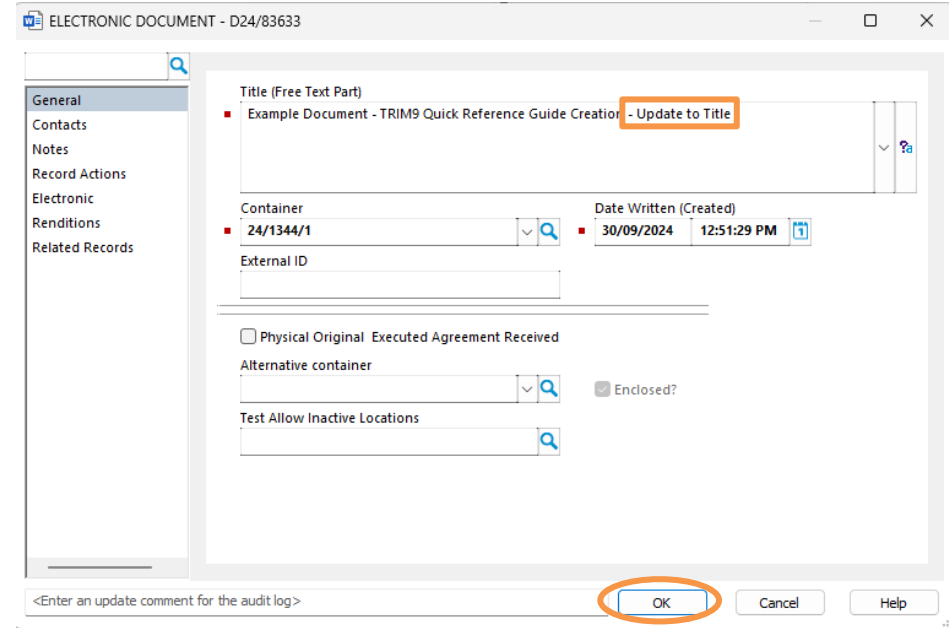
You can change the title of a record (Cabinet, Folder, Sub-Folder, Document, Email etc.) if you have made an error or you need to add additional information.

To change the title of a record in TRIM:

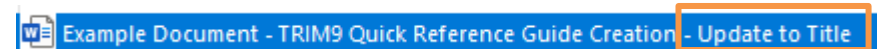
1. Locate the record for which you want to change the title.
2. Right-click on the record and select **Properties**:



3. The **Record Entry Form** for that record will appear. In the 'Title (Free Text Part)' field, update the title as required, then select **OK**:



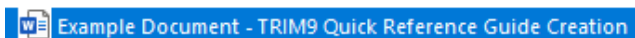
4. The record will now display its updated title:



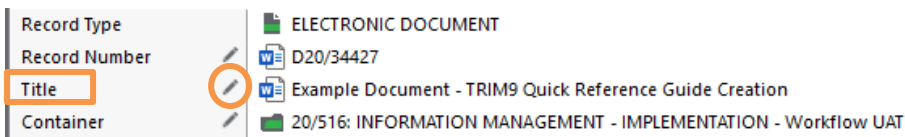
Changing the Title of a Record – Alternate Method

An alternate method for changing the title of a record is:

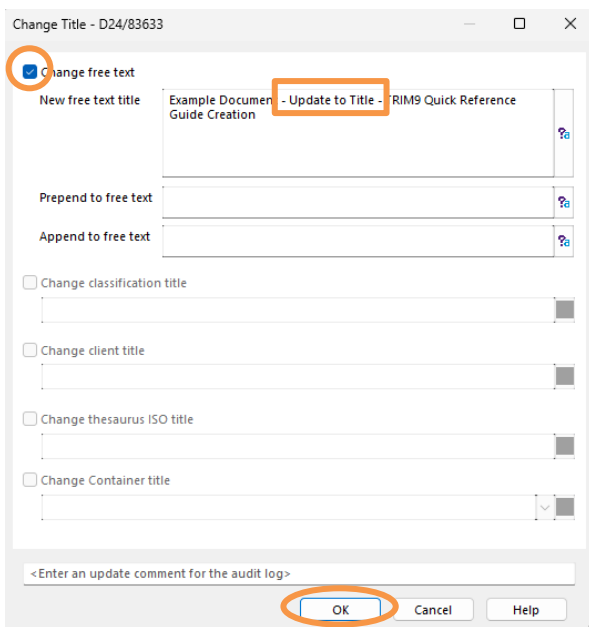
1. Locate the record for which you want to change the title.
2. Click on the record once to highlight it blue:



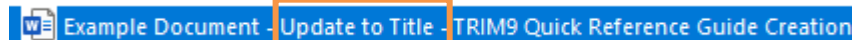
3. Locate the 'Title' field in the **View Pane** at the bottom of the TRIM screen, then click on the **Pencil icon** associated with that field:



4. The **'Change Title'** window will appear. Place a tick in the 'Change free text' field by clicking the checkbox once, then make the required change to the title in the 'New free text title' field. Then click **OK** to save your change:



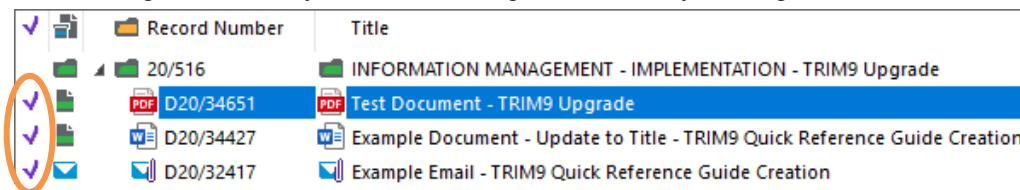
5. The record will now display its updated title:



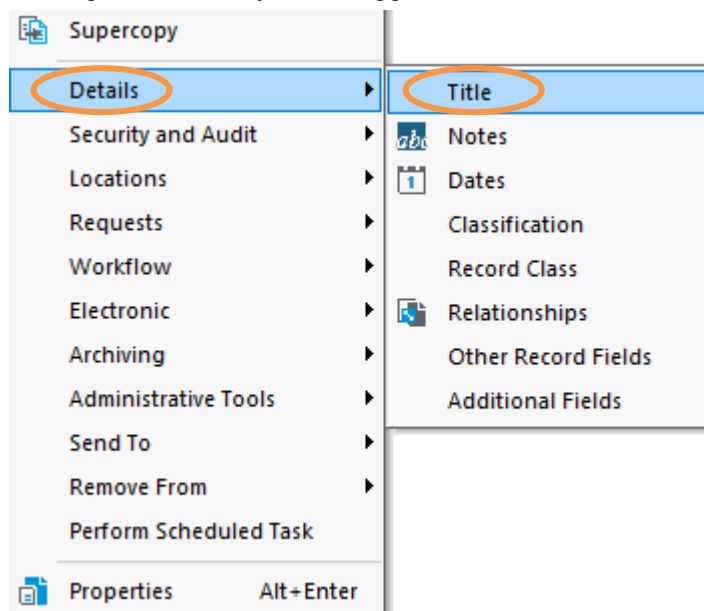
Changing the Title of Multiple Records

If you need to make consistent changes to the title of multiple records, it is possible to change the title of two or more records at the one time:

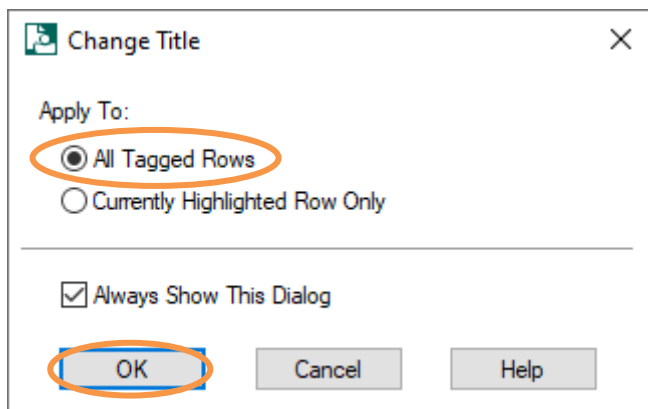
1. Locate the records for which you want to change the title.
2. Tag the records you want to change the title of by clicking to the left of them:



3. Now right-click on any of the tagged records and select **Details** → **Title**:



4. The **'Change Title'** window will appear. Ensure 'All Tagged Rows' is selected, then click **OK**:



Change Title

Apply To:

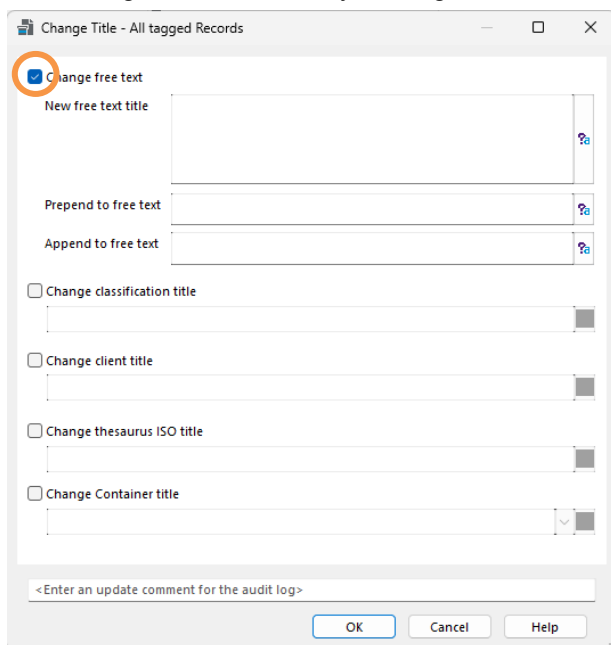
All Tagged Rows

Currently Highlighted Row Only

Always Show This Dialog

OK Cancel Help

5. The **'Change Title - All tagged Records'** window will appear. Place a tick in the 'Change free text' field by clicking the checkbox once:



Change Title - All tagged Records

Change free text

New free text title

Prepend to free text

Append to free text

Change classification title

Change client title

Change thesaurus ISO title

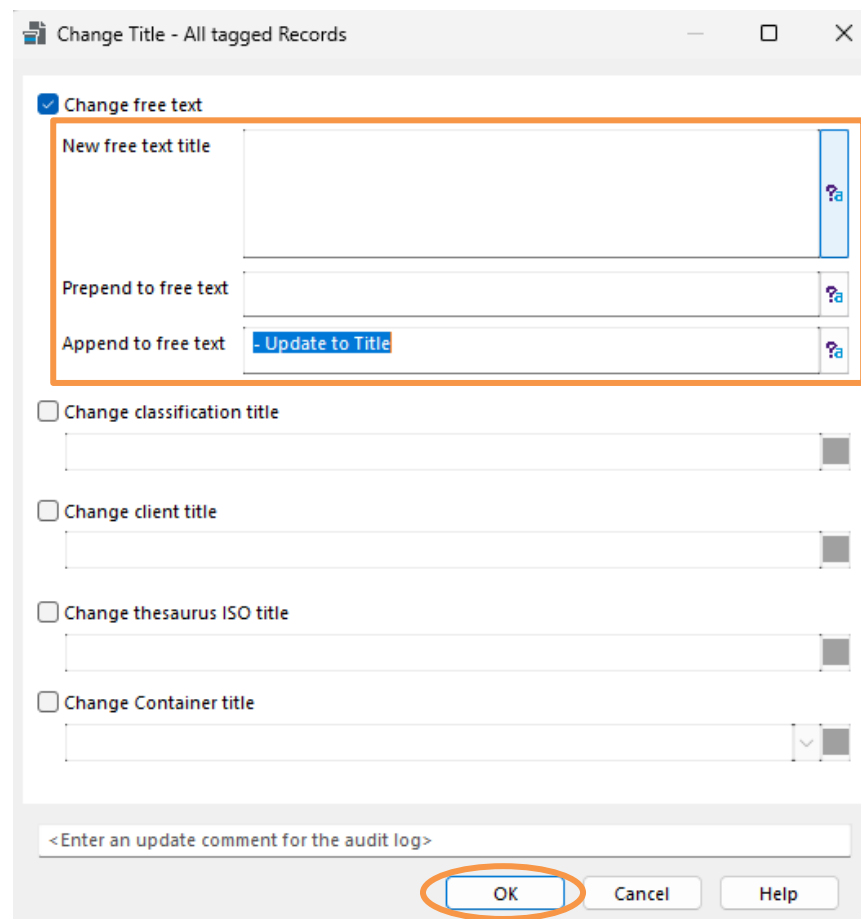
Change Container title

<Enter an update comment for the audit log>

OK Cancel Help

6. You now have three options for changing the title of the selected records:
- **New free text title** : You can type a new title to replace the existing title of all selected records,
 - **Prepend to free text** : You can type a phrase to be placed at the beginning of the existing title for all selected records,
 - **Append to free text** : You can type a phrase to be placed at the end of the existing title for all selected records.

Select the appropriate option and make your required changes (example in screenshot below), then select **OK**:



Change Title - All tagged Records

Change free text

New free text title

Prepend to free text

Append to free text - Update to Title

Change classification title

Change client title

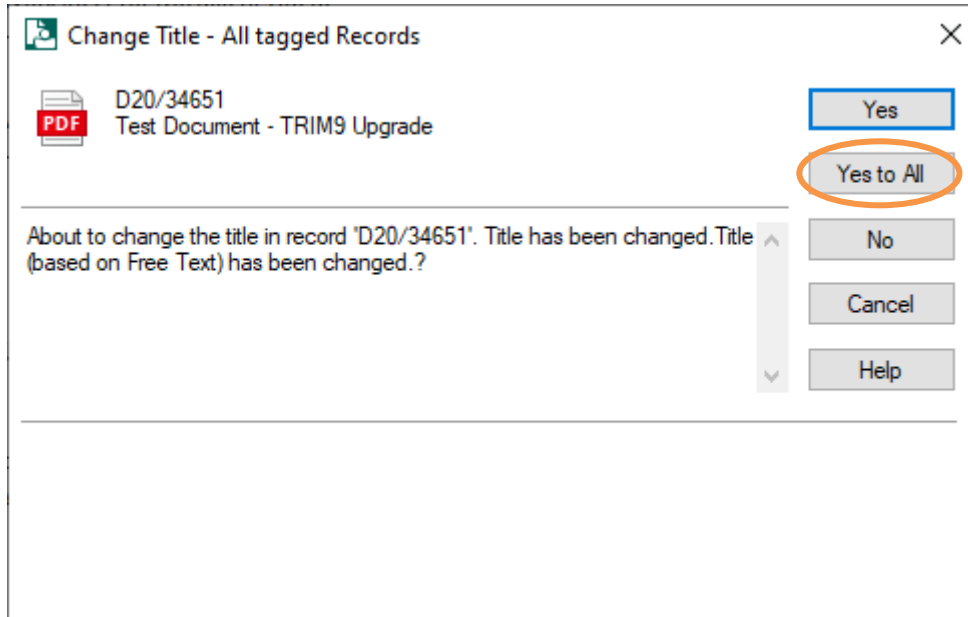
Change thesaurus ISO title

Change Container title

<Enter an update comment for the audit log>

OK Cancel Help

7. The 'Change Title - All tagged Records' window will appear. Select **Yes to All**:



8. The records will now display their updated titles:

