

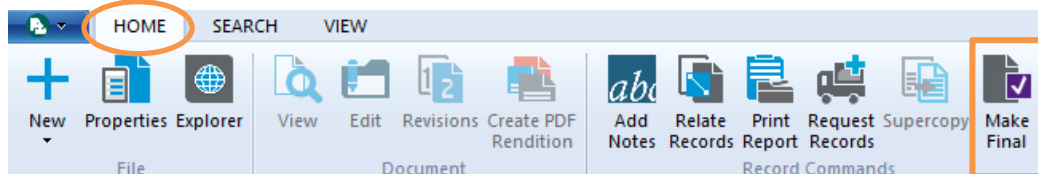
Finalising

Once a record has finished being edited/should no longer be edited in TRIM9 (e.g. a contract that has been signed by all approvers, an outgoing letter signed by the sender, endorsed meeting minutes etc.) and the final version captured in TRIM9 as the last revision, it is important to finalise the document to prevent any unauthorised edits or changes to the record.

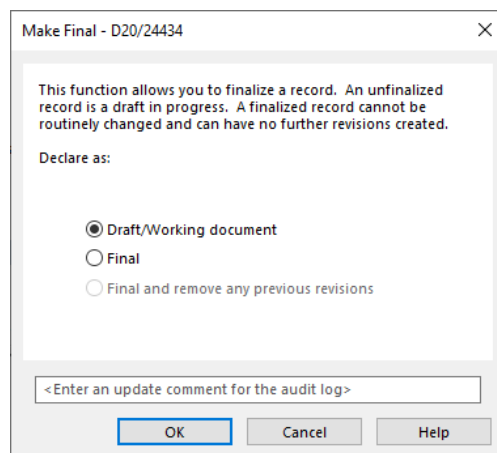
This applies not only to documents, but also other records such as spreadsheets, presentations, photos etc. where changes should no longer be made, and hence where that record should be made read only.

To finalise a record:

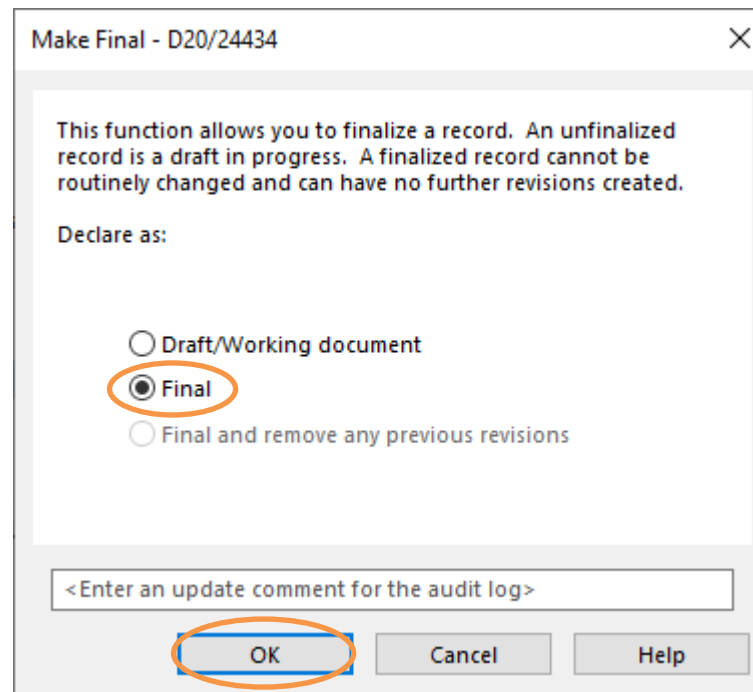
1. Click on the record once.
2. Select the **HOME** tab, then select the **Make Final** button:





3. The 'Make Final' window will appear:



4. Select **Final** then select **OK**:



5. The 'Edit Status' field in the **View Pane** will show **Finalised**:

Date Modified	 Friday, 24 January 2020 at 3:41 PM
Edit Status	 Finalized
Checked Out To	
Checked Out On	

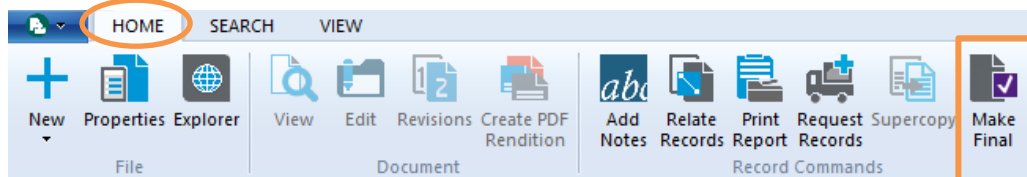
Reversing a Final Declaration

Most TRIM9 users can change the status of a record from finalised back into a draft/working document. This is to allow end users to quickly and easily un-finalise a record should it have been finalised prematurely/by accident.

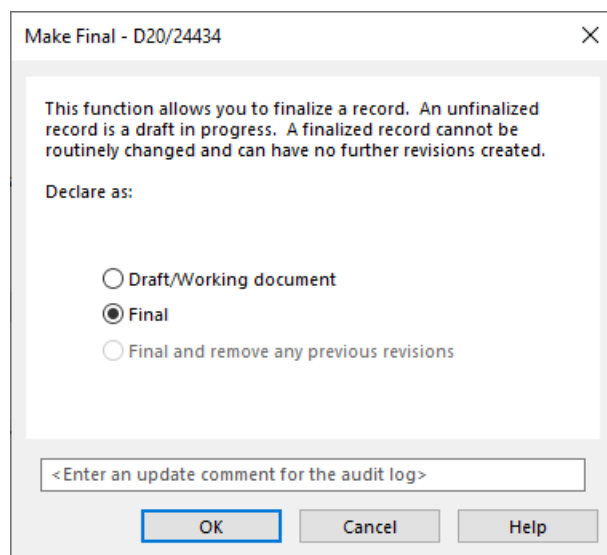
When deciding whether to un-finalise a record, TRIM9 users should exercise caution, and ensure that reversing the Final declaration is appropriate in the circumstance:

To reverse a Final declaration:

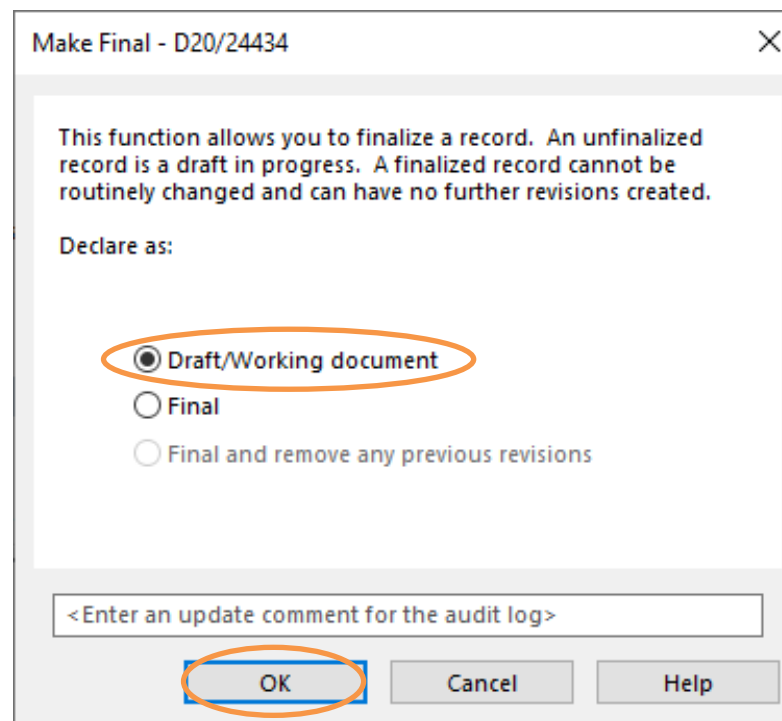
1. Click on the record once.
2. Select the **HOME** tab, then select the **Make Final** button:



3. The 'Make Final' window will appear:



4. Select **Draft/Working document**, then select **OK**:



5. The 'Edit Status' field in the **View Pane** will show **Checked In**:

