6 DOCUMENT SAVING AND EDITING

6.1 PROFILE SCREEN

Double clicking on a document opens up the Profile Screen. Select what you want to do with the document:

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>View</td>
<td>Opens a Read-Only copy.</td>
</tr>
<tr>
<td>Edit</td>
<td>Opens a copy that can be altered. Upon saving and closing the document it will be checked back into Records Explorer as a new revision (see Section 6.4).</td>
</tr>
<tr>
<td>Details</td>
<td>Select to view the metadata of the document (i.e. the Title, Retention Schedule, Assignee etc)</td>
</tr>
<tr>
<td>Properties</td>
<td>Select to see an editable version of the metadata</td>
</tr>
<tr>
<td>Checkin</td>
<td>This option will only be available if the document you have selected is currently checked out to you.</td>
</tr>
<tr>
<td>Finalise</td>
<td>Locks the document so that it becomes Read-Only and can no longer be opened for editing by users. If at a later date a revision needs to be made you can create a new version (see Section 6.3) and make changes to that document, which will be related to the first document as [v1] and [v2] etc.</td>
</tr>
<tr>
<td>Update Typed Title</td>
<td>Allows you to make changes to the document title. Enter the changes to the title and then click the Update Typed Title button.</td>
</tr>
</tbody>
</table>

6.2 CHECKING OUT A DOCUMENT FOR EDITING

To edit a document you must check it out of Records Explorer. When you check it out it will be saved into your My Documents under a folder called “Offline Records” with the same red and blue X that characterises Records Explorer. Upon saving the edited document it will be checked back into Records Explorer as a new revision under the same name, record number etc.
To check out a document double click on the document name. The **Profile Screen** will appear:

Select the **Edit** option. The document will launch in its native application.

Edit the document and click Save as normal. Then close the document. The document is now checked in. There can be some delay between closing a document and Records Explorer recognising that the document is checked back in. Before you close your Records Explorer session open the **My Checked Out Documents** menu item. This should be empty. If not, double click on the document and select the **Checkin** option from the Profile Screen.

You can hit CTRL+s or save in Word (etc) as many times as you like whilst you are working on the document, a new revision will only be created in Records Explorer once you have closed the document at the end/checked it back in.

When opening Records Explorer for the first time each day you will receive a message if there are any documents Checked Out to you. You will not receive any message if there are no documents Checked Out and you will not receive a message again until you have logged out of your computer and back in again.

### 6.3 CREATING A NEW VERSION OF A DOCUMENT

Locate the document that you wish to create a new version of.

Right Click on the Document name, select Advanced > **Create New Version**
The following dialogue box will appear. The greyed out fields will be inherited automatically, you can customise what other aspects of the original record you want the new version to inherit. Records Management Services recommends that you do not change any of the defaults. :

If you have already begun drafting the New Version of the document and it is saved in your network drives tick the **Use the following document to start off the new version** check box at the bottom, the field below it will then become active and the document icon at the far right can be clicked to start a Browse.
Locate the document in your drives and click Open. Then click OK in the original dialogue box.

If you do not have a working draft, skip the above step and simply click OK. The New Version will be a direct copy of the original until you open it and make changes.

The two versions will have [v1] and [v2] appended to the title. They will also have the same record number but with [v1] and [v2] appended to the Record Number.

It is best practice to then Finalise the original document so that it can no longer be edited. Double Click on the document with [v1] appended to the title. Select Properties from the Profile Screen.

Check the box at the bottom of the screen Declare As Final After Saving:
Click **OK**

If the new version of the document needs to be placed into a different folder, locate that other folder and drag the document over. The following dialogue box will appear:

Select **Move these Record to the Container**. You will get a confirmation that the move was successful.

### 6.4 VIEWING PREVIOUS REVISIONS OF A DOCUMENT

Each time a document is checked out, changes are made and the document is checked back in, Records Explorer saves a new revision and keeps the old copy in the background. These previous incarnations can be viewed by double clicking on the document and selecting the **Properties** option from the Profile Screen.
Select the **Revisions** tab:

![Properties Window](Image)

**NB - If a document has never been modified the Revisions tab will not exist.**

Under the Revisions tab will be a list of all previous revisions of the document, in the example below there has only been one modification. You can use the **Preview** tab at the bottom to see a reduced version of the previous version:
The Preview may not always work, as some document types are not supported by the Document Viewer.

Or double click on the revision path in the top view pane. The following dialogue box will appear:

Select View, and the document will launch in its original format.

If the document opens in the TRIM Document Viewer open File > Launch and it will launch into the native format.

6.5 VIEWING THE AUDIT LOG

Each time a person makes a modification on a folder or document this activity is recorded in the Active Audit Events against their unikey login.

Locate the document/folder. Right Click > Show in Context:
The **Select From Records** dialogue box will display. Right Click > Details > **Active Audit Events**:

![Select From Records Dialogue Box](image)

The **Active Audit Events** will then display with the activity performed listed under **Event**, the unikey of the person who performed the activity under **Login**, plus the **Event Date** of the activity and some further context listed under the **Event Details**:
6.6 ATTACHING A RECORDS EXPLORER DOCUMENT TO AN OUTLOOK ITEM

This function is only supported for Outlook at the present time, not for other email clients.

Locate the document in Records Explorer.

Right click on the document name > Advanced > Send Email via Outlook

The following dialogue box will appear:
Select the Mail Item Type you desire – Email, appointment or task – on the left.

On the right are three options for the attachment format:

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Attach As TRIM References</td>
<td>Provides the recipient with a link to the document in TRIM Desktop. The recipient will only be able to open the document if they are a registered user with Records Management Services and they have sufficient access rights to view your documents. Sending a link to a colleague allows them to check the document out and edit it, check it back in and all the work automatically captured into TRIM.</td>
</tr>
<tr>
<td>Attach As Real Electronic Document</td>
<td>Provides the recipient with a normal attachment in its native application (e.g Excel or Word). This provides no security measure on who can open the document. If the person makes any revisions to the document they will not be captured into TRIM unless this is conducted manually.</td>
</tr>
<tr>
<td>Use Both Methods</td>
<td>This can provide the recipient with a link to the document in TRIM if editing is required, it can also provided them with a native copy of the document if they need to send it on to a third party or do not wish to make any changes to the document but would still like to know where the document is located in TRIM. This is also useful if you are not sure if multiple recipients are Records Explorer users.</td>
</tr>
</tbody>
</table>

This method cannot be used to attach to a reply. Nor can you drag a document from Records Explorer to Outlook as an attachment. You will need to save a copy to your network drive/desktop by Right Click > Advanced > Export As...
You will be given the following options – the default option is to export only the current incarnation of the document:

![Export to File System Window](image)

- Export only the latest documents (Most Recent Edit)
- Export only the first documents (Originals)
- Export first documents and latest documents
- Export all document revisions

You can then attach the document to the Reply as you would normally.