Business rules need to be established to define the use of revisions and versions of electronic documents in TRIM.

- **Versions** are basically new copies of an electronic document that use the latest revision of that document. You may create multiple versions of an electronic document and each will be registered as a separate record in TRIM. You can select what information the new version will retain of the current record.

- **Revisions** are modified copies of an Electronic Document. You may create multiple revisions of an Electronic Document and each of these will be attached to the same record in TRIM Context.
How to Create a New Version of an Electronic Document

1. Search for the Record (Electronic Document) you wish to make a new version of.

2. Right-click on the record and select New > New Version. The Create New Version dialog box will display.

   ![Create New Version Dialog Box]

3. Select the record Properties you wish to copy to the new version.
   Use Select All and Select None to select or deselect all the available active properties.
   - **Security Profile** – Copy the Security details (Security Levels and Caveats).
   - **Access Control** – Copy the Access Control settings (Public, Private, Container or Custom).
   - **Disposition** – Copy the Disposition details *(for example, Active, Inactive etc.)*.
   - **Attached Thesaurus Terms** – Copy any attached Thesaurus Terms (Terms used in the Title will be copied automatically with the Title details).
   - **Attached Classification** – Copy any attached Classification Levels (Levels used in the Title will be copied automatically with the Title details).
   - **Relationships** – Copy any record Relationships *(for example, Related To, Copy of etc.)*.
   - **Notes** – Copy the Notes information.
   - **Attached Actions** – Copy any attached Actions.
• **Additional Fields** – Copy any User Defined Field details.
• **Contacts** – Copy any attached Contact details.
• **Assignee** – Copy the Assignee Location details. This option is selected by default.
• **Owner Location** – Copy the Owner Location details. This option is selected by default.
• **Home Location** – Copy the Home Location details. This option is selected by default.
• **Container** – Copy the Container details. This option is selected by default.
• **Electronic Document** – Copy any attached Electronic Documents. This will only copy the latest Revision of the Electronic Document attached to the record. This option is selected by default.
• **Retention Schedule** – Copy any Archive Retention Schedule details.
• **Date Fields** – Copy the Date Fields.

4. **Number of Copies** - As you are creating a new version, only one copy is necessary. This option is therefore set to one and disabled.

5. **Use the following document to start off the new version** – select to nominate an external file as the new first revision of the new version.

6. Click **OK**.

Note (1): It is only possible to have a Version link to the root part of a record. Any later parts of this record cannot be a new Version nor have a new Version. However, they will display the root part and its Version link in the View Pane option *All Versions*

Note (2): *Remove Version* - You are not permitted to remove the ‘First Version of’ relationship from a record’s properties (Related Records Tab) as all Version relationships depend on the root Version, which is always the first Version created. Removal of the ‘Latest Version of’ is permitted from records that are not first Versions.

**To Search for the ‘Latest Version’**

Depending which document you highlight will depend what menu options will be available. For example, if the document does not have any versions, the option to search for them will not be available. If you have the latest version highlighted it will only give you the option to navigate to ‘all versions’ associated.

To search for the latest version from version one:

1. Highlight the record.

*Tip: You can customise your view pane in TRIM to include the following options:*

- All Versions.
- Latest Version.
- Latest Finalised Version.