

## Global Settings

Before you start using the TRIM9 Web Client it is recommended to get Global Settings. The Global Settings have been set for you by the Administrator, and will assist in the view and expected behaviour of the Web Client.

**Note:** You don't need to get Global Settings each time you use the Web Client. Ideally you should get Global Settings the first time you use the Web Client, and additionally any time you are asked to do so by Records Governance Services.

To get Global Settings:

1. Select the **Settings** button at the top right of the TRIM9 Web Client screen:



2. The **'SETTINGS'** window will open. Select **GET SETTINGS**:

### SETTINGS

DASHBOARD CONFIGURATION LOCALE DOCUMENT VIEWER

Content Manager Web Client supports up to 3 dashboard items.

- ☒ DOCUMENTS CHECKED OUT
- ☐ RECORDS DUE
- ☒ FAVORITE RECORDS
- ☐ FAVORITE SAVED SEARCHES
- ☐ RECORDS IN OR DUE
- ☐ RECORDS IN
- ☐ RECENT CONTAINERS
- ☒ RECENT DOCUMENTS
- ☐ RECORDS WORK TRAY

GET SETTINGS

OK

CANCEL

3. You will be asked to confirm that you want to change your settings to the global settings. Select **Yes**:

### SETTINGS

You are about to download the following global settings as defined by your Administrator: Time Zone, Search Result Page Size, Document Viewer and Dashboard Configuration settings. Are you sure you want to change your settings to the global version?

Yes Cancel

4. Your TRIM9 Web Client screen will quickly flicker in the background. Once this has happened, select **OK** to close the **'SETTINGS'** window:

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GET SETTINGS

OK

CANCEL