

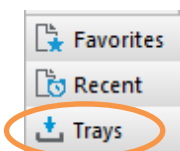
Purpose

This document is designed to assist staff with checking (and amending if necessary) the default settings for their **Records Due** Tray in TRIM9. Ensuring these defaults are set correctly will allow you to see Actions that have not only been assigned directly to you, but also to Groups and Positions that you are a member of.

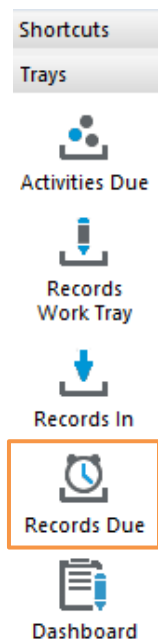
Records Due Tray

To check (and amend if necessary) your Records Due Tray settings:

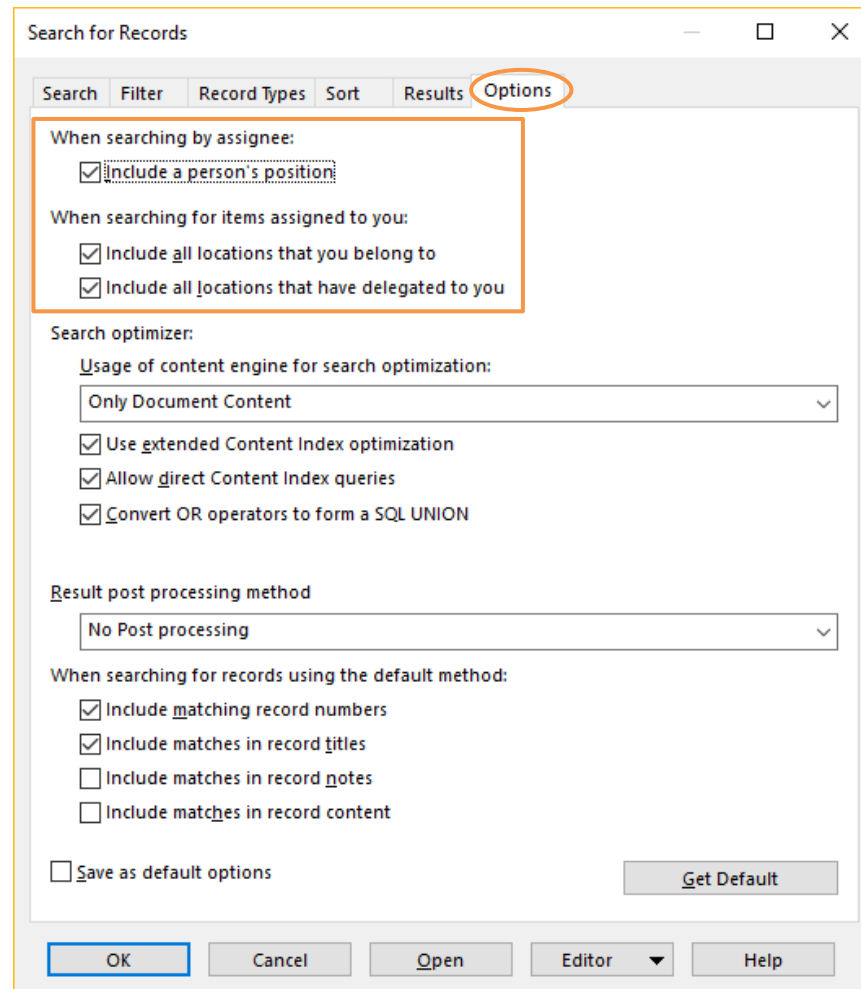
1. Ensure the **'Trays'** tab is selected in the **Shortcuts Pane**. At the bottom left of the TRIM9 screen is where you can select between the three Shortcuts tabs:



2. Click on the **Records Due** Tray:



3. Press **F7** on the keyboard and the **'Search for Records'** window will appear. Click on the **'Options'** tab, then ensure that the first three checkboxes are ticked:



4. Place a tick in the 'Save as default options' checkbox, then click **OK** to close the **'Search for Records'** window:

