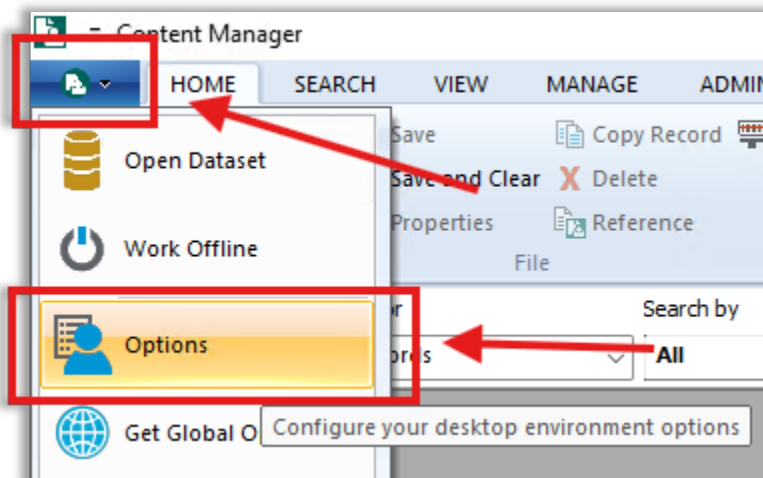


User Customization Settings

Here are a few recommended user customization settings to set up when you are just getting started with Content Manager:

How to Set Favorite Records to show on Startup:

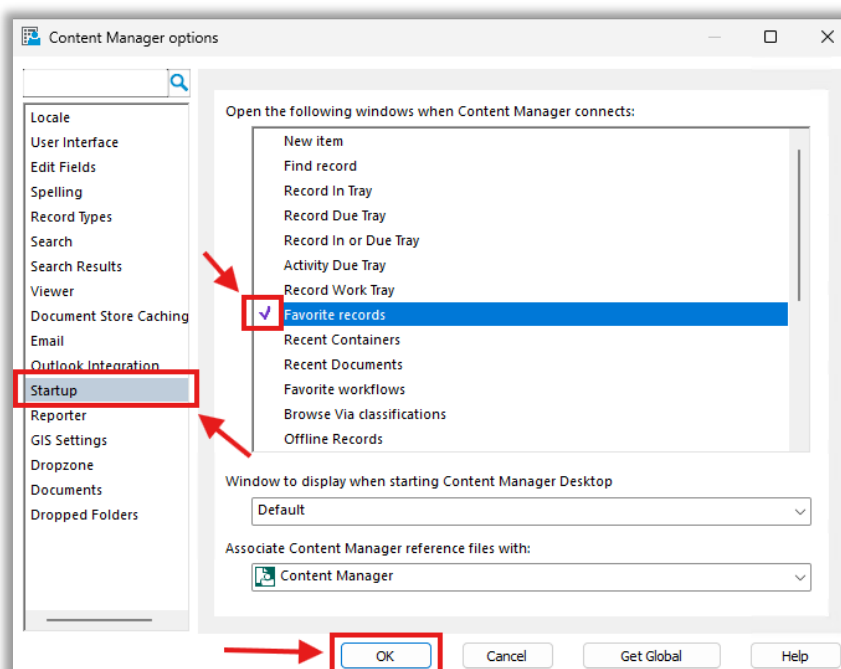
Step 1. Log into Content Manager, then click on the blue **FILE** button in the top left corner.



Step 2. Click on the **OPTIONS** tab.

Step 3. Click on the **STARTUP** tab under the selections of options.

Step 4. Click on the empty space to the left of the **FAVORITE RECORDS** option to make a **CHECKMARK** ✓ appear. Then click on the **OK** button.

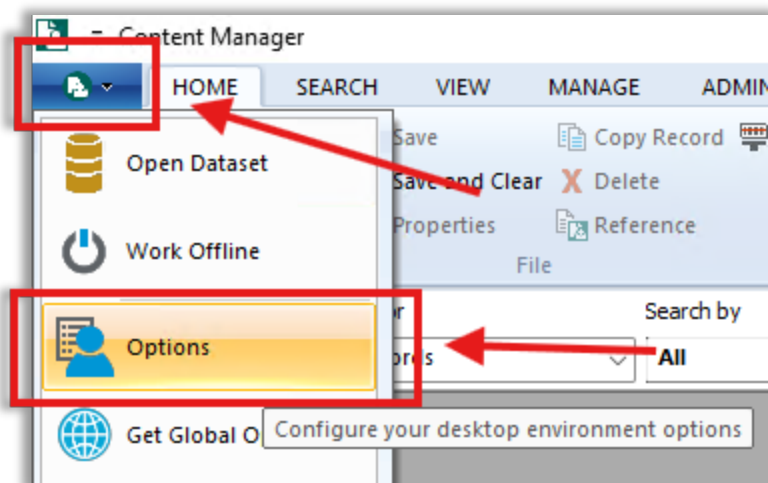


Your Favorite Records list will now open automatically when starting up Content Manager

User Customization Settings

How to Set a Default Record Type:

Step 1. Log into Content Manager, then click on the blue **FILE** button in the top left corner.

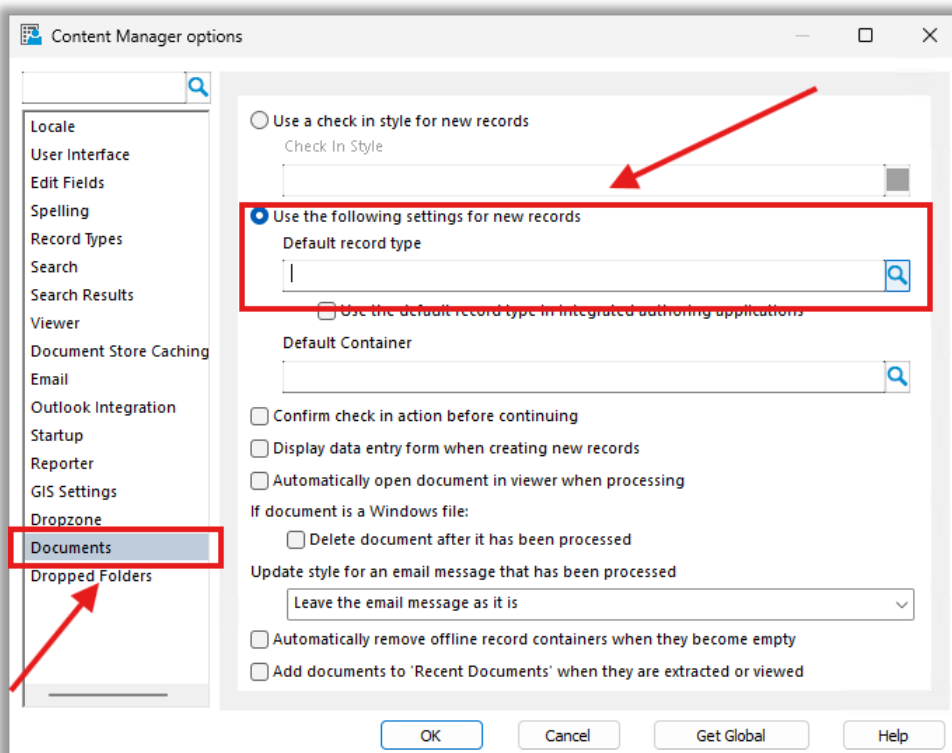


Step 2. Click on the **OPTIONS** tab.

Step 3. Click on the **DOCUMENTS** tab under the selections of options.

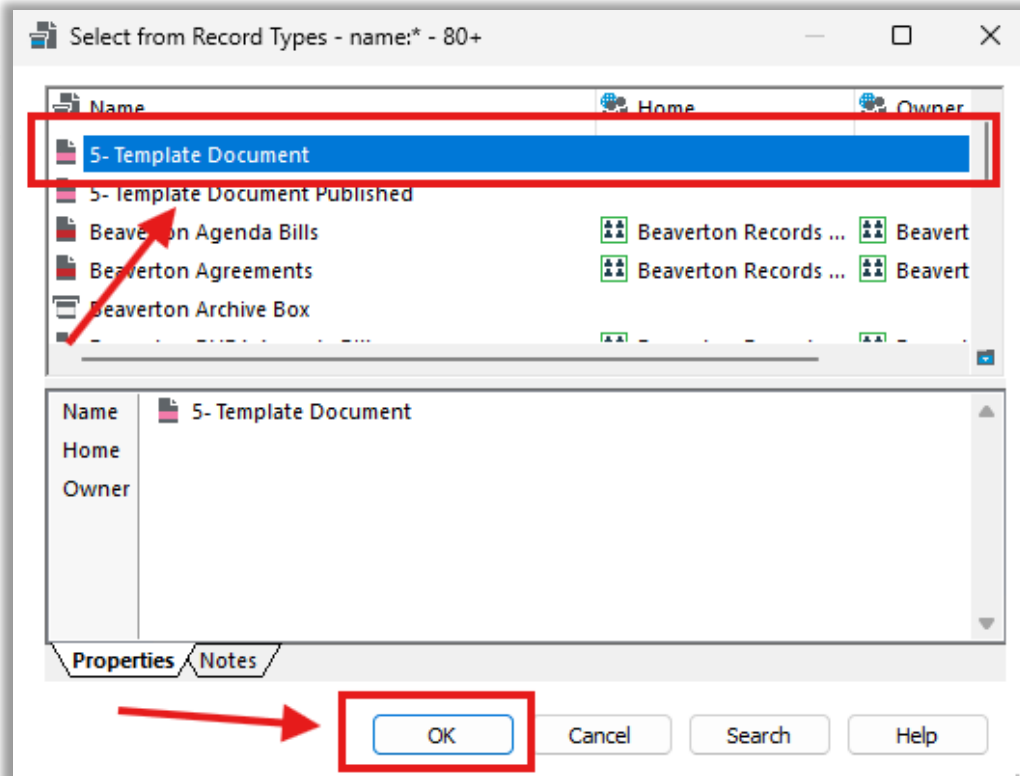
Step 4. Select the option to “Use the following settings for new records.”

Step 5. Click on the magnifying glass icon  under the **DEFAULT RECORD TYPE** section to open an additional pop-up window.

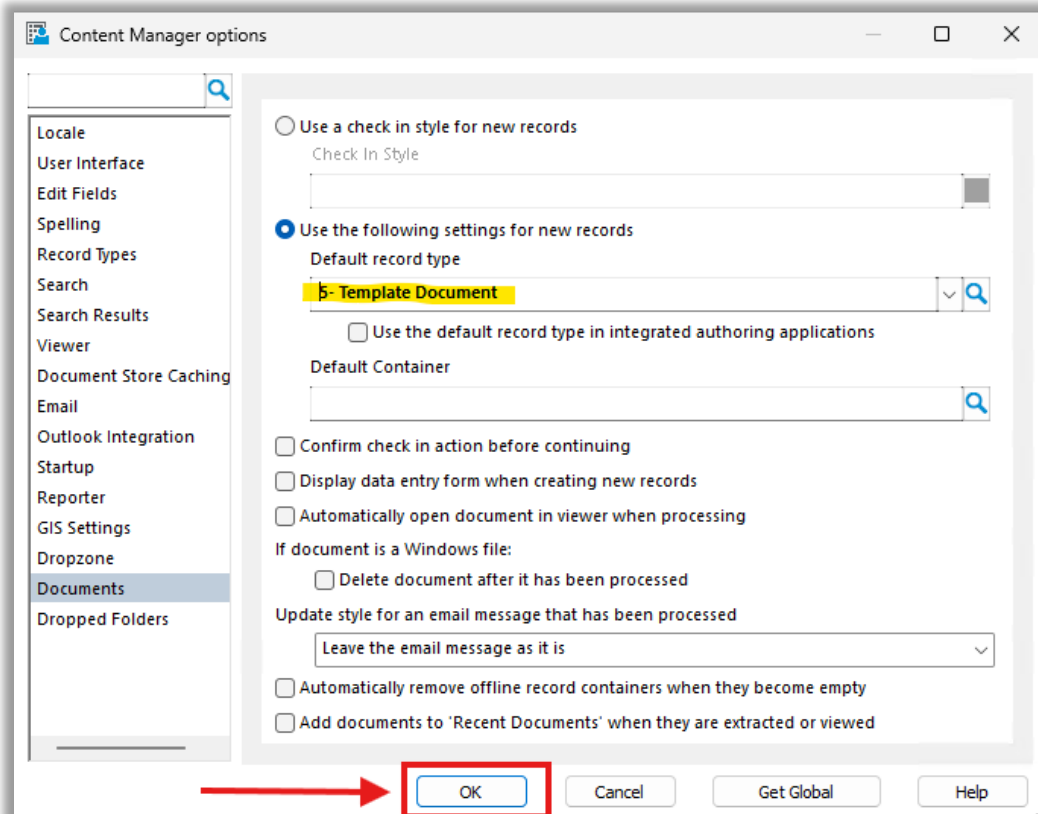


User Customization Settings

Step 5. In the new window, select which **RECORD TYPE** you would like to become your Default Record Type, then click the **OK** button. **USE CAUTION** when selecting a “published” record type as your default record type. Using a “published” record type will make those records available to the public via WebDrawer.



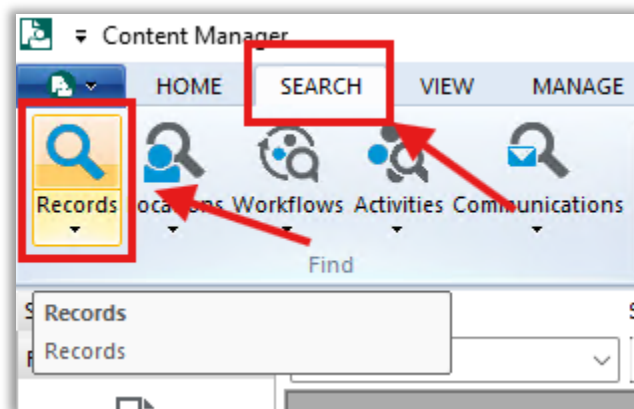
Step 6. Click the **OK** button.



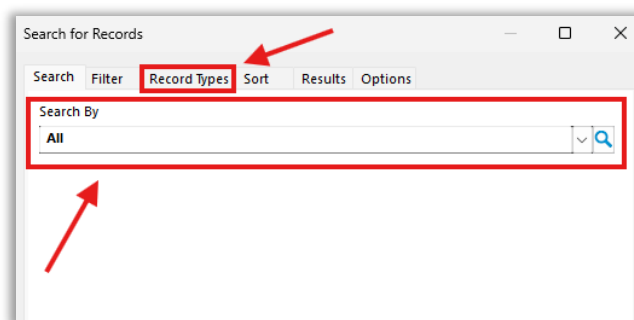
User Customization Settings

How to Set Favorite Records:

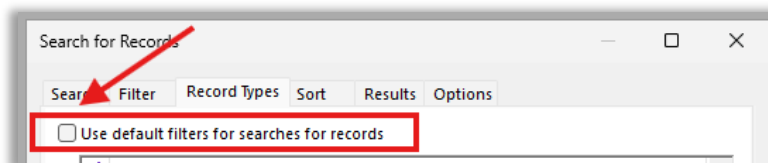
Step 1. Log into Content Manager, click on **SEARCH** tab, then click on the **RECORDS** button in the top left corner.



Step 2. In the pop-up window, change the **SEARCH BY** option to **"All"** then click on the **RECORD TYPES** tab.

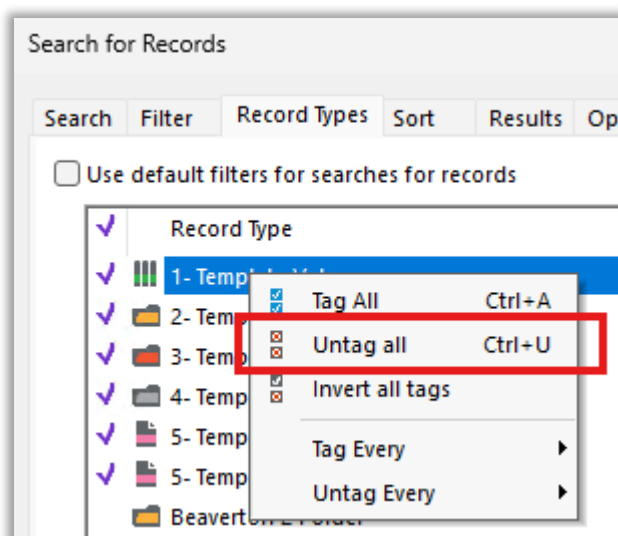


Step 3. **UNCHECK** the option that says **"Use Default filters for searches for records."**



Step 4. **RIGHT-CLICK** on any of the Record Types then click on **UNTAG ALL**, to untag all unwanted record types.

Note: Alternatively, you can hit **CTRL+U** on your keyboard to **UNTAG ALL**.



User Customization Settings

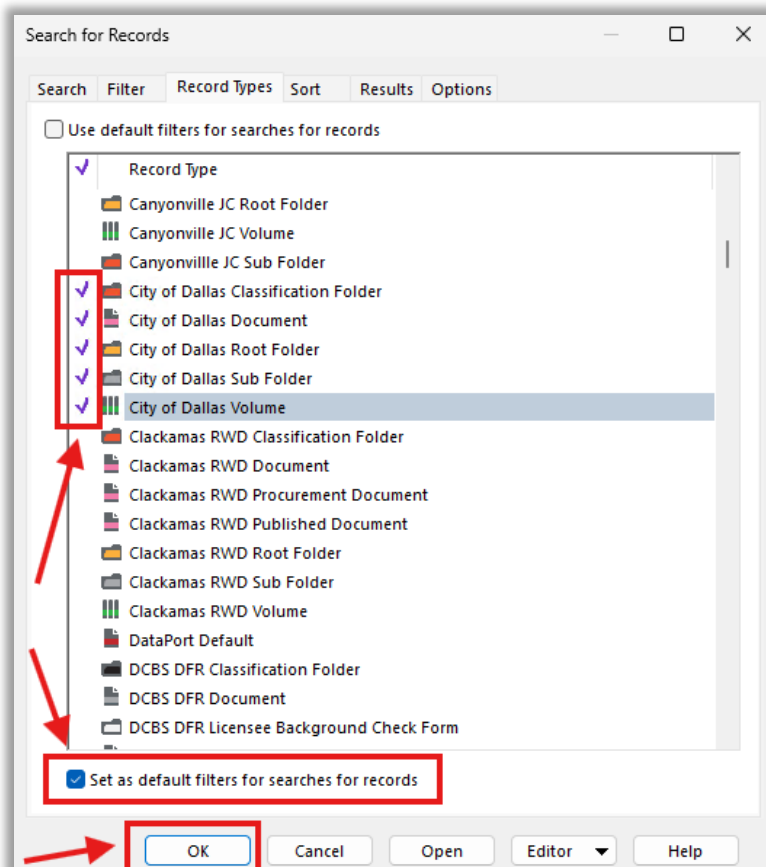
Step 5. Click on the empty spaces to the left of each of the records that are associated with your agency to make a **CHECKMARK** ✓ appear.

Note: City of Dallas is being used as an example.

Step 6. Click on the empty box next to “Set as default filters for searches for records” to make a checkmark. ✓

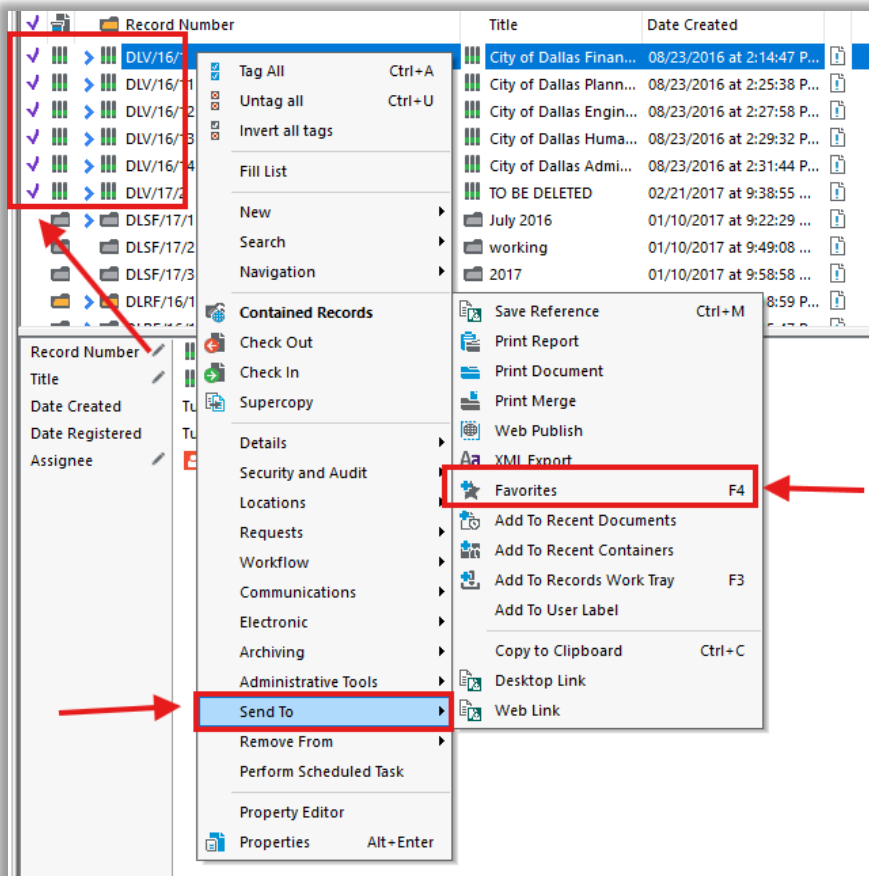
Step 7. Click the **OK** button.

Note: Any future searches will now only bring up records from your agency.



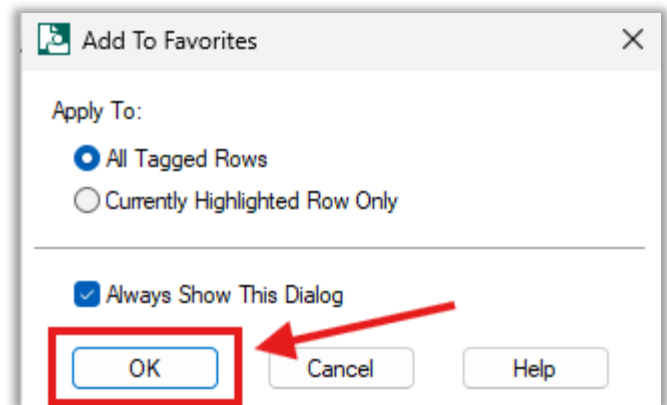
Step 8. Click on the empty spaces to the left of each Volume Record III to make a **CHECKMARK** ✓ appear.

Step 9. **RIGHT-CLICK** on any of the listed Volume Records III, hover your cursor over **SEND TO** then click on **FAVORITES**.

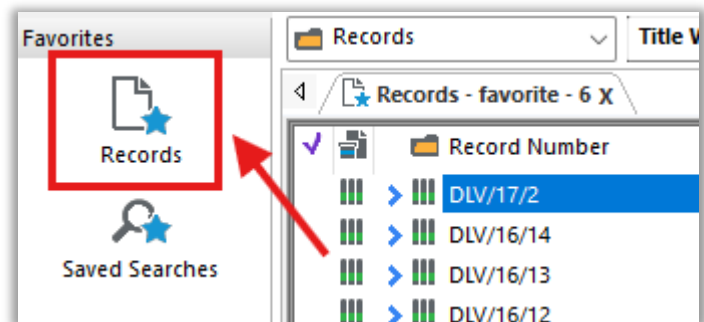


User Customization Settings

Step 10. On the pop-up window, click on the **OK** button.



Step 11. Click on the **RECORDS** icon under the **FAVORITES** TAB on the left side of the screen to quickly open your selected Favorite Records at any time.



Note: If you follow the instructions on **How to Set Favorite Records to show on Startup** from the first page of this guide, your Favorite Records will show up instantly every time you log into Content Manager.