



LAPTOP SETUP GUIDE



THE GLOBAL ADVISORY
AND ACCOUNTING NETWORK

MENZIES
BRIGHTER THINKING

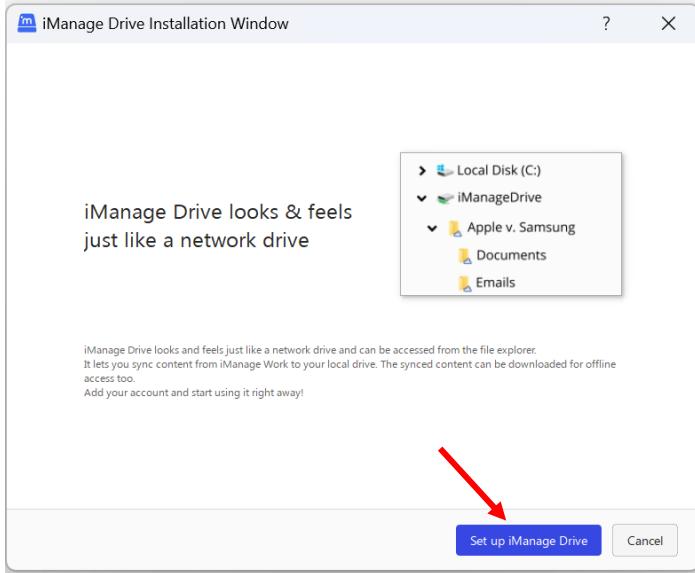
**UPON RECEIVING YOUR LAPTOP.
PLEASE PLUG IT IN TO START
CHARGING.**

**AFTER LOGGING IN - IGNORE ANY
POPUPS OR DIALOGUE BOXES YOU
MAY SEE AND CONTINUE WITH THE
BELOW.**

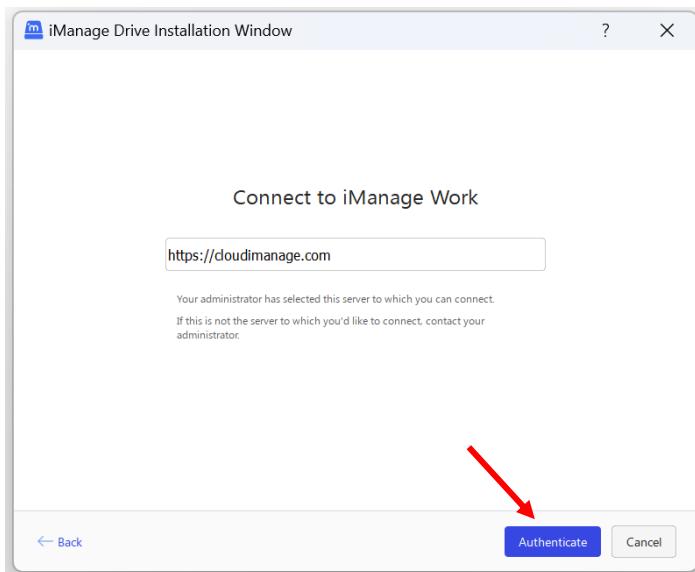
ANY ISSUES CONTACT IT SUPPORT RIGHT AWAY.

SETTING UP IMANAGE

You should see an iManage window like the one below.

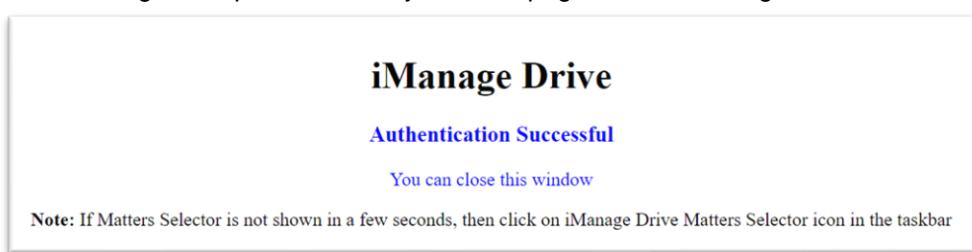


Click 'Set up iManage Drive', which will take you to a page like below, click 'Authenticate'.



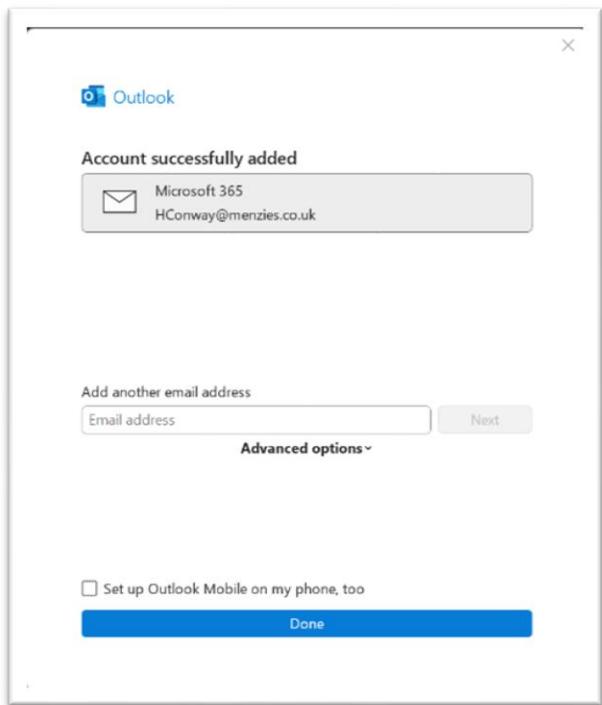
A new window will open prompting you to type your email address, click 'Remember email' then 'Continue'.

Microsoft Edge will open, wait until you see a page like below, Edge can be closed for now.



SETTING UP OUTLOOK

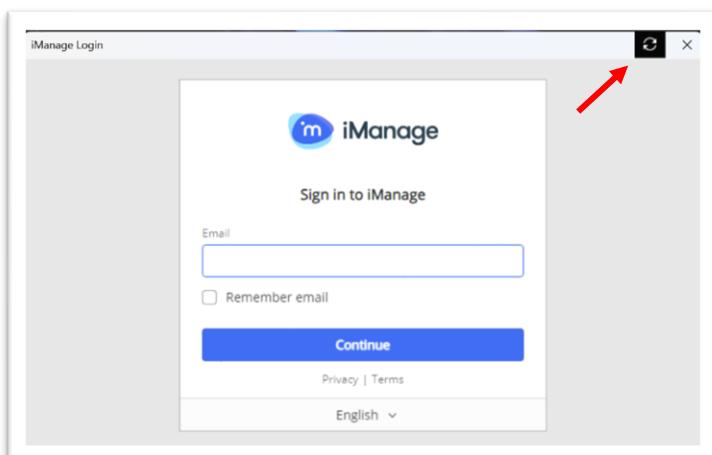
Open Outlook and go through the setup until you get to the following page:



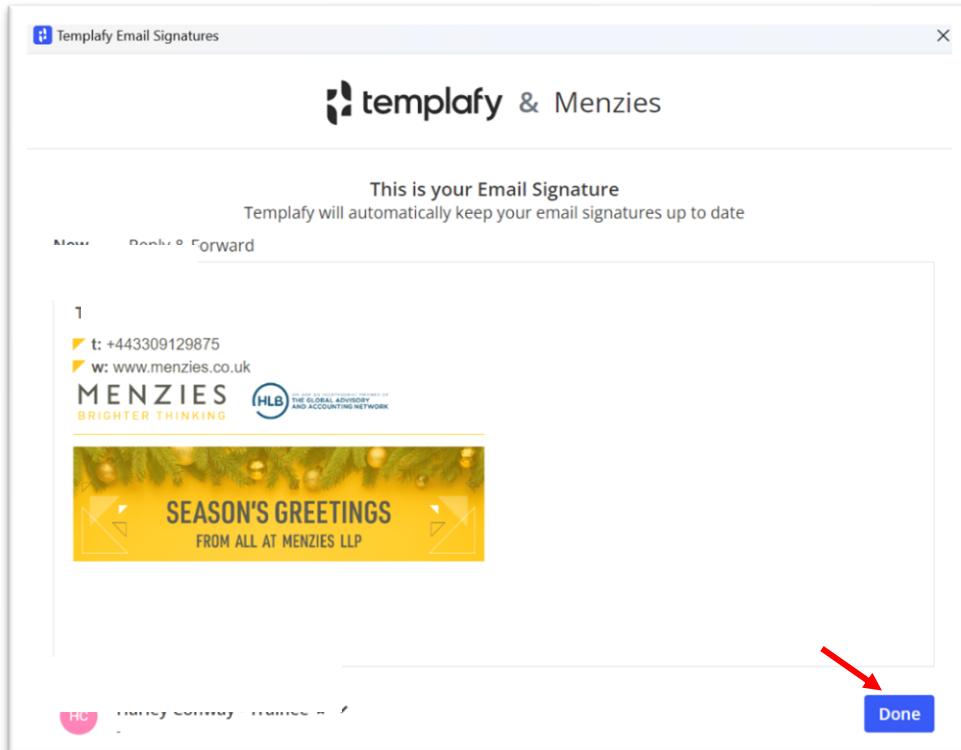
Uncheck **'Set up Outlook Mobile on my phone, too'**, then click **'Done'**.

You will then see an **iManage pop-up**, prompting you to **type your email**, do so, then check **'Remember email'**, then click **'Continue'**.

If you see a blank window, click the **'Refresh'** icon in the **top right corner**.



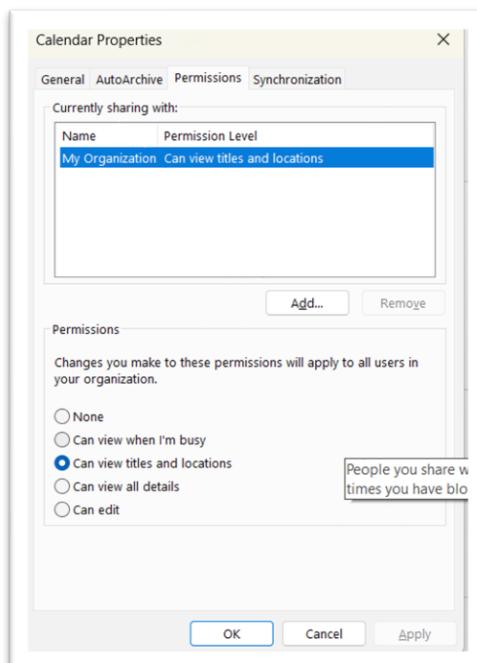
Templafy is the signature service we use. A pop-up will show your current signature, click 'Done' to close it.



FOR NEW STARTERS WHO JUST JOINED:

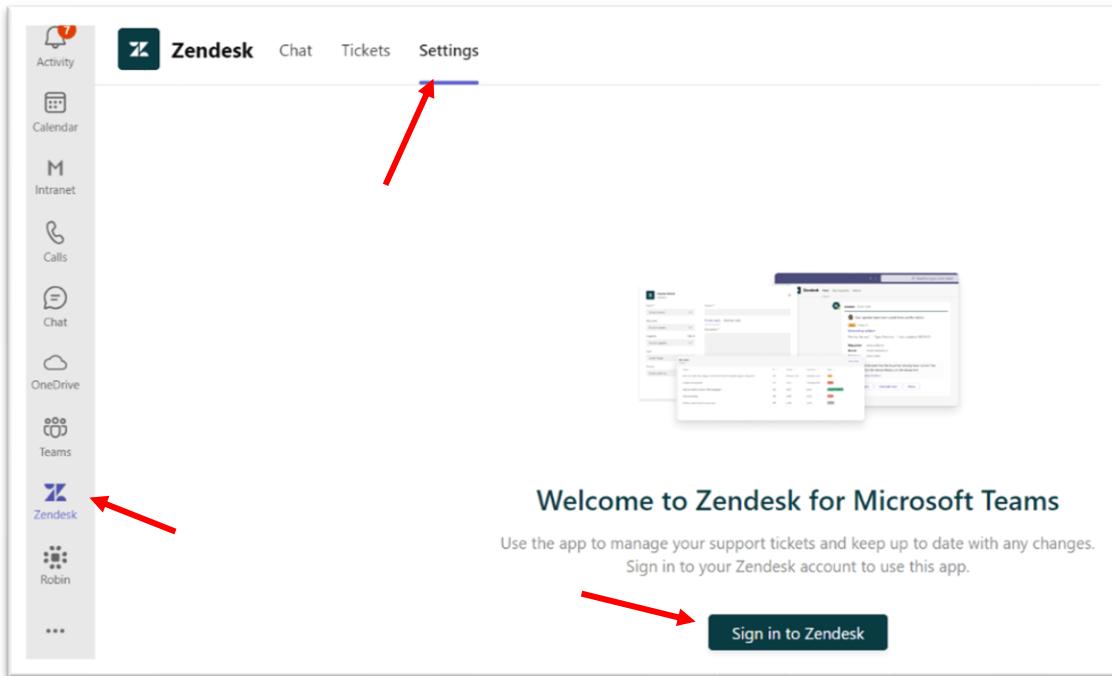
Once in Outlook, click the **Calendar** icon on the left, then find '**Calendar**' (your email address should be beside it) under '**My Calendars**' and right click-it. Then click '**Sharing Permissions**'.

In the newly opened window, check '**Can view titles and locations**'.



SETTING UP TEAMS

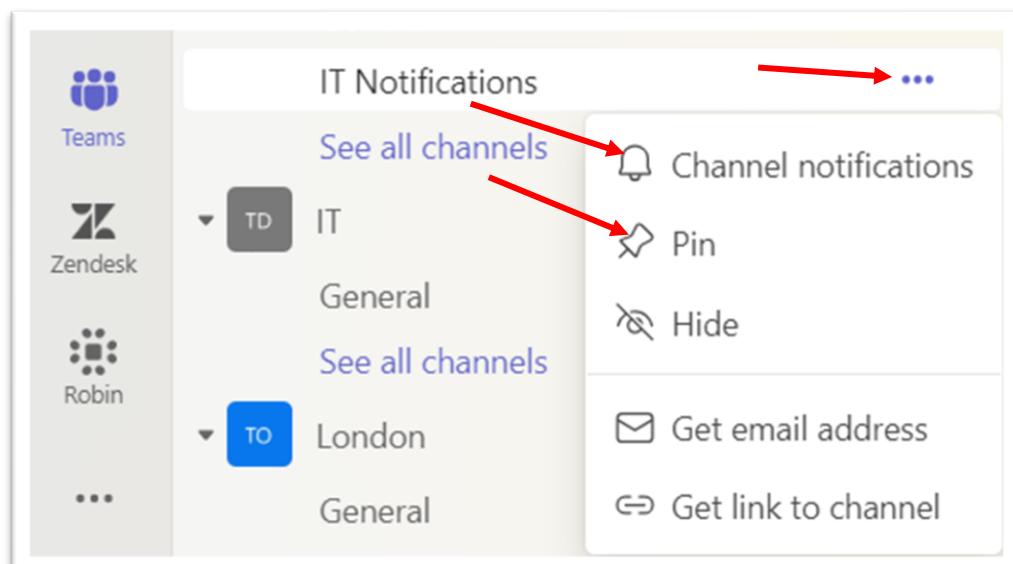
Open **Teams**, click '**Zendesk**' on the left side, then click '**Settings**', then '**Sign In**'.
This will open an Edge window asking to allow permissions, click '**Allow**'.



Zendesk is the ticketing system IT Department use, should you have any IT issues/queries this is one of the main ways to contact us.
Further info can be found on the IT Intranet site and Welcome Pack.

Back in Team, click '**Teams**' on the left. Then under '**Menzies**' click '**See all channels**' Find '**IT Notifications**', click '**Show**', it should then appear on the left.

Click the **three dots** then '**Pin**', click the **three dots again** then '**Channel notifications**'



Set '**All new posts**' from '**Off**' to '**Banner and feed**'.

This is how the IT Department will inform the firm of any issues or updates regarding the system.

SETTING UP PRINTERS

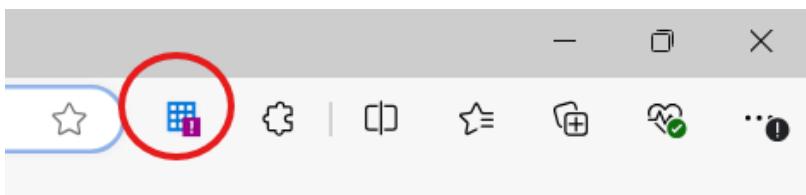
Click on the links below for the two-step process for Printer setup:

[How to setup OptimiDoc Printer – Menzies](#)

[How do I change the Default Printer on Windows 11 – Menzies](#)

SETTING UP EDGE

Open **Microsoft Edge**. Find the **blue grid** icon in the top right and click it (if you do not see it, click the **jigsaw** icon beside it to reveal, and pin it)



If you are not already signed in, then click '**Sign in to get started**'. It will lead you to another page to '**Pick an account**', click your account.

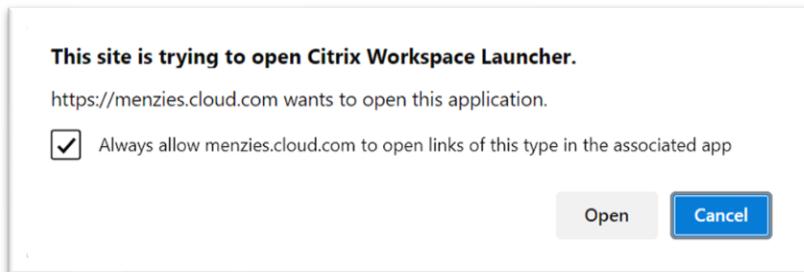
Click the blue grid icon and then '**My Apps**'.

Find and click on '**Zendesk**'. In the top right corner click '**Sign In**'

Once signed in you can close Zendesk. This is where the Knowledgebase is, where you can find helpful articles and log tickets too.

SETTING UP CITRIX

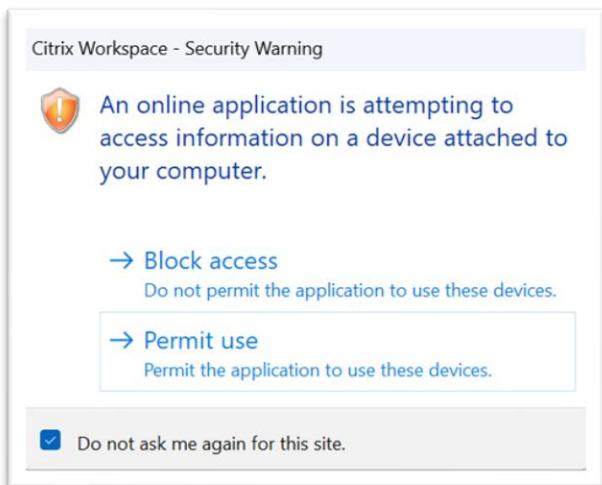
Open MyApps again. Find and click 'Citrix', then click 'Detect Workspace'



Tick the box 'Always allow...' then 'Open'.

Once the Citrix window opens, click 'File Explorer'.

Then tick 'Do not ask me again for this site' and click 'Permit use'

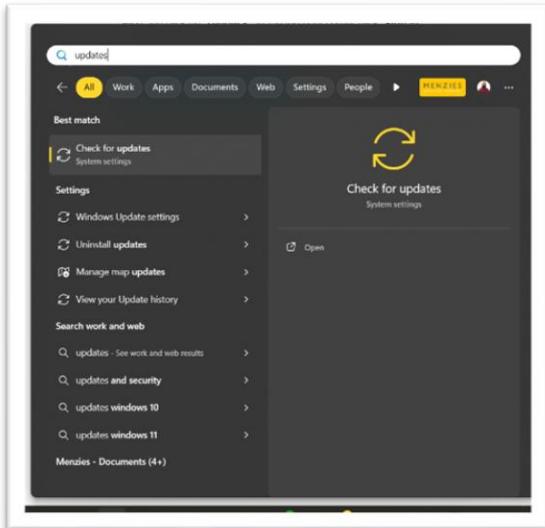


Once File Explorer opens click 'This PC'. Again tick 'Do not ask me again for this site' and click 'Pernit all access'

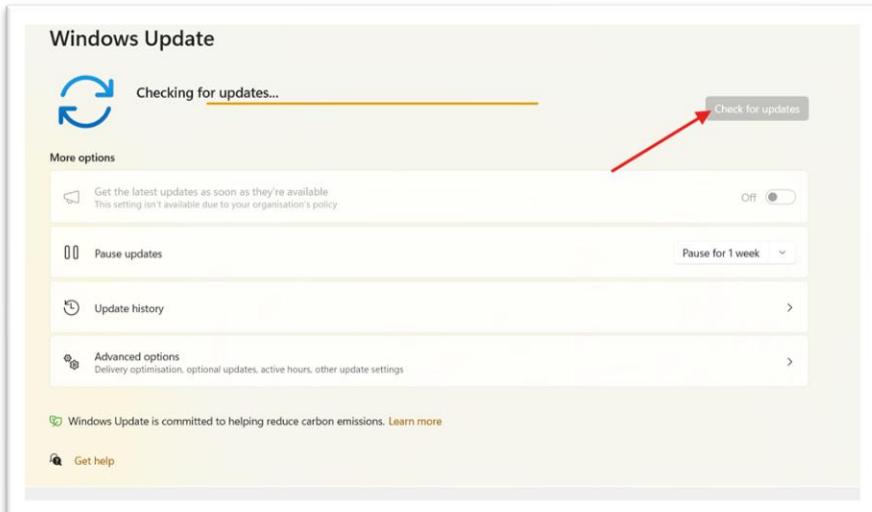
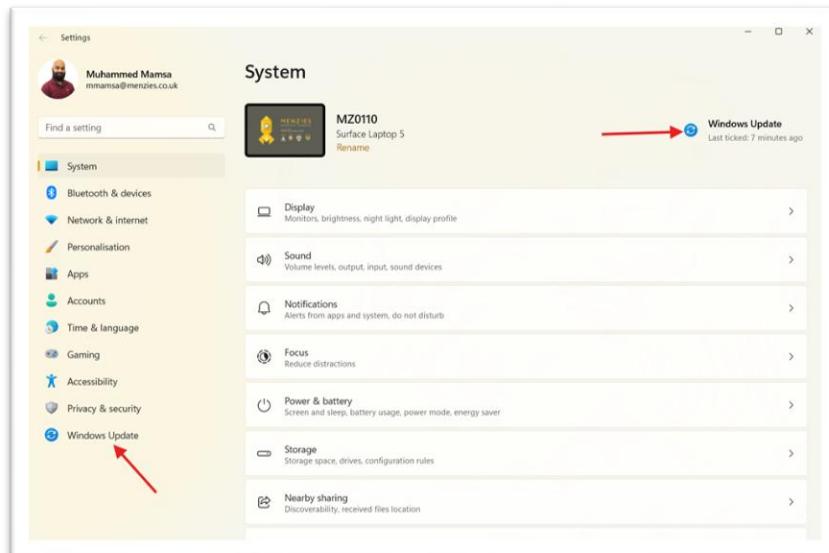
File explorer can now be closed.

WINDOWS UPDATES

Press the Start button and type 'Updates' and select 'Check for updates' to open **Settings > Windows Updates**



Then select 'Check for Update' and it will download them if any. If you see a button saying 'Optional updates' then press it. Tick all the updates available and install all of them. Please restart once done to avoid any issues.



INSTALLING MISCELLANEOUS PROGRAMS

Open Company Portal, click 'Apps'.

Here you will see any apps that you have access to download. Feel free to download any you may need / find useful. If unsure ask your team manager or contact IT.

IT suggestions:

- DocuSign
- Microsoft To Do
- Zoom

If in Account & Audit:

Please follow this guide to [Install CaseWare 2023 locally on your laptop – Menzies](#)