

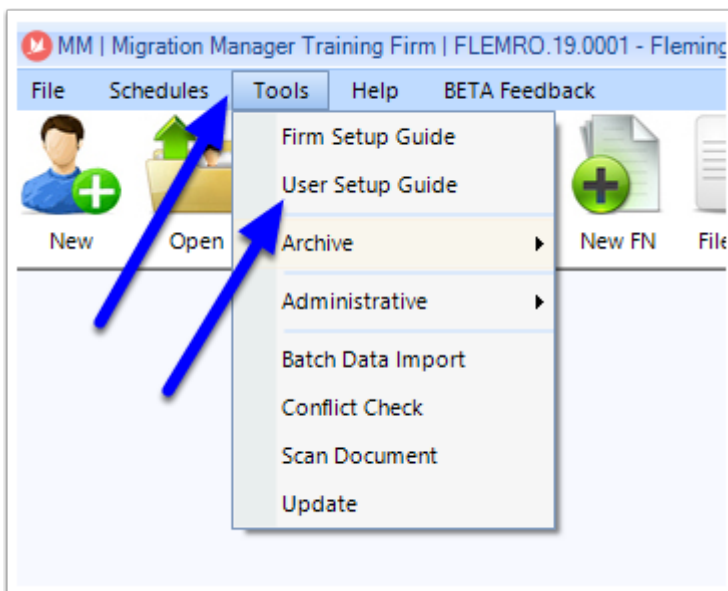
# User Setup Guide - User Preferences

The User Preferences window which is accessible from the User Setup Guide allows the user to modify how various parts of the program will behave for that user. This guide covers which of the settings a new user should adjust.

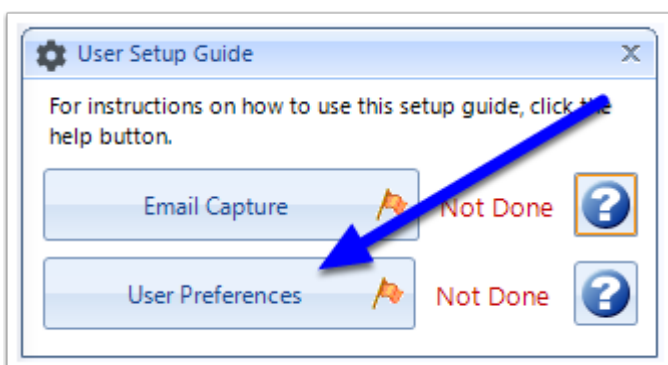
**Note:** This settings window is also accessible from the parts of the program which are controlled by these settings - you will see a settings icon which can be clicked to open this window.

## 1. Open the User Setup Guide

First open the User Setup Guide. Go to **Tools > User Setup Guide**.

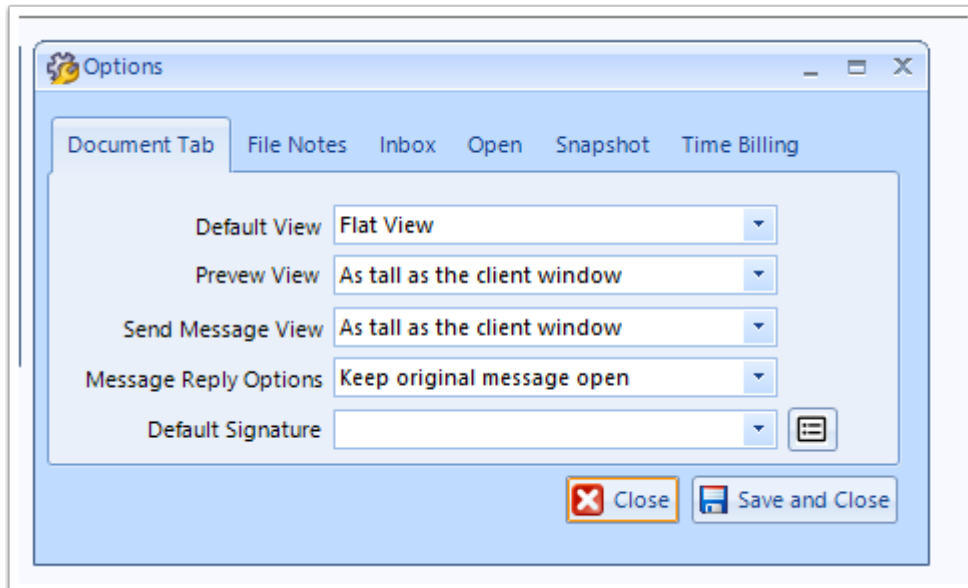


Once the User Setup Guide appears, click **User Preferences**.



## 2. Options window

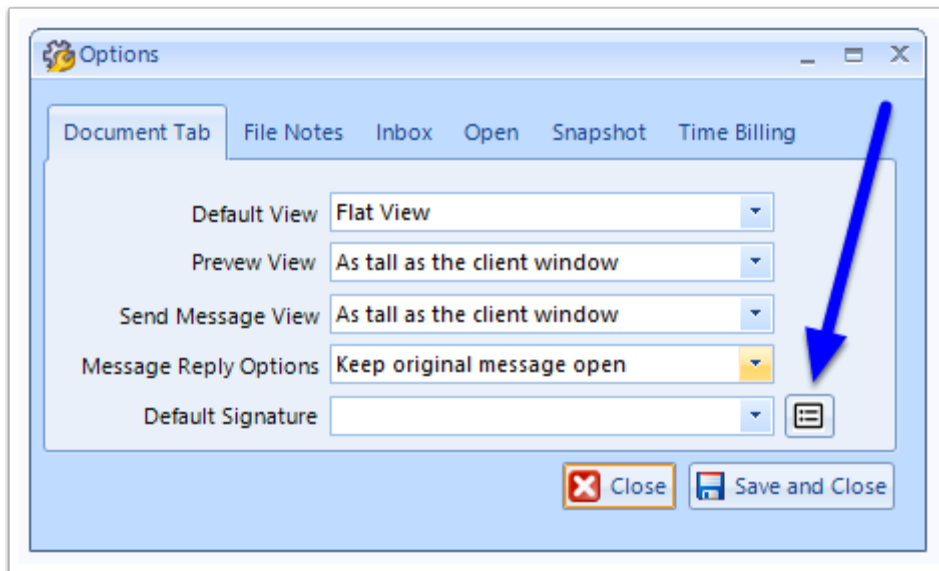
The Options window will now appear which contains all of the user preferences for controlling how different aspects of the program will look/behave for the use.



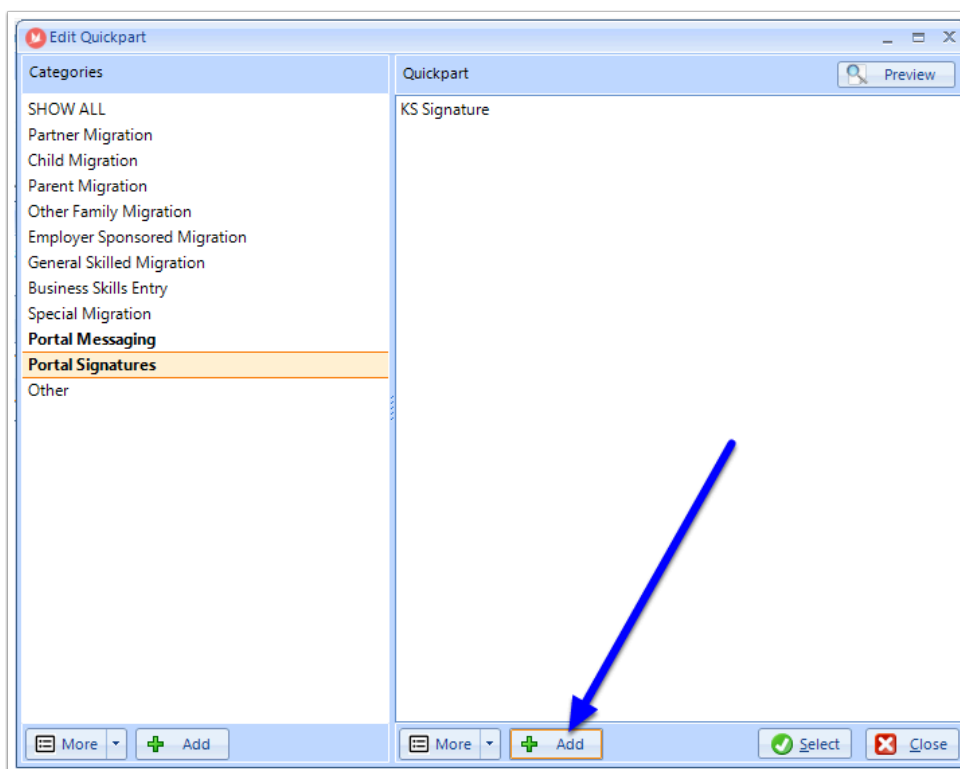
## 3. Document Tab

The Document tab options controls the options for the Document tab of a matter and how the user is presented with information. Most of these setting do not need changing for new users except for the Default Signature option - details of what all of the options do can be found at: [Documents Tab User Preferences](#).

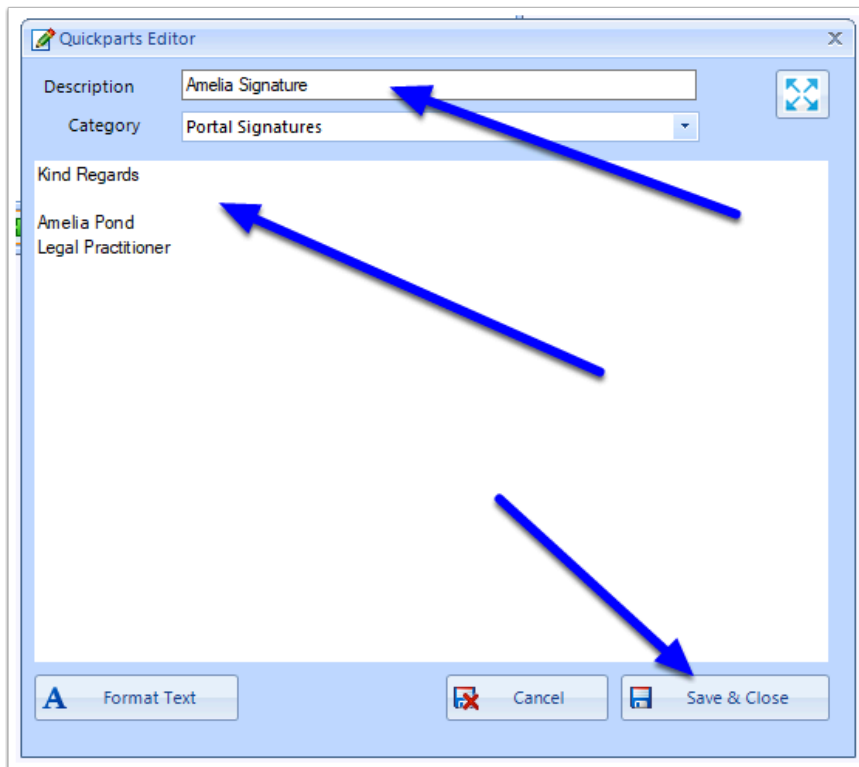
The Default Signature option controls the signature which appears by default on all new portal messages which are generated. To create your signature, click on the 'More' button on the right.



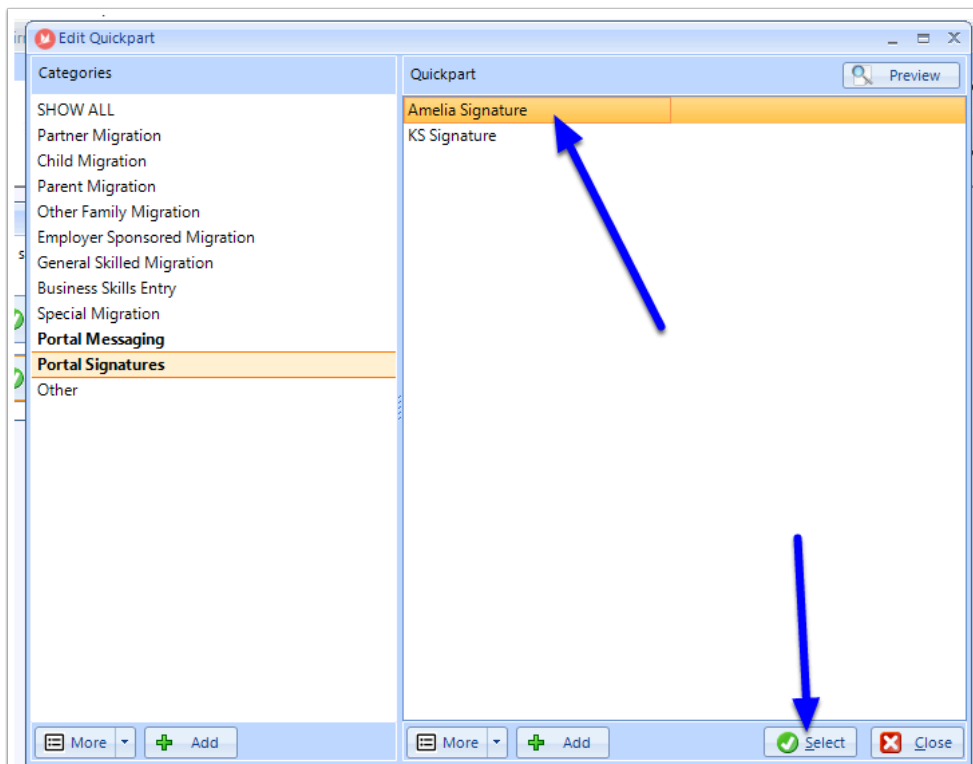
The Edit Quickpart window will now appear. Click the Add button to create a new Quickpart which will be used as the signature.



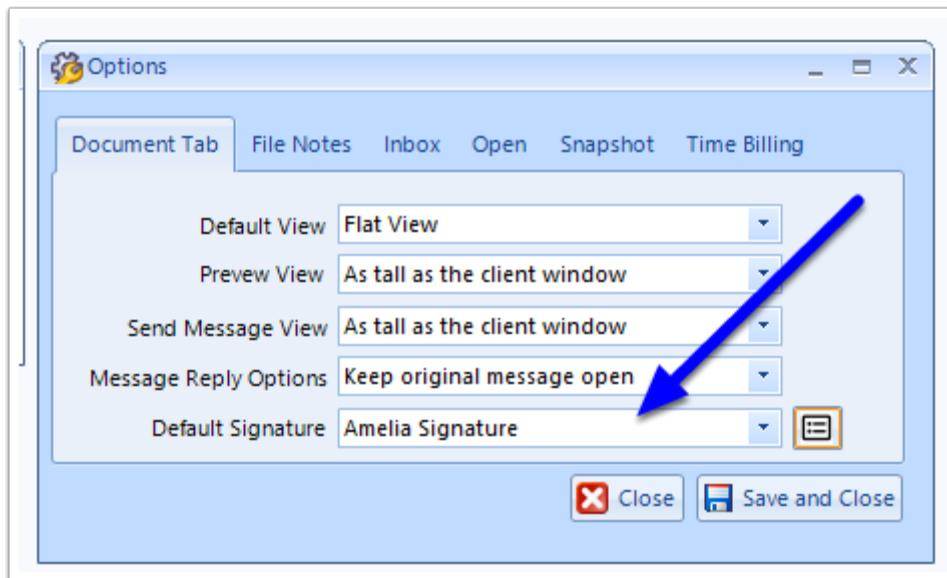
In the Editor window, add a description and then enter the wording you want to use for the Signature. When you have finished click **Save & Close**.



Next highlight the newly created signature and the click the **Select** button.

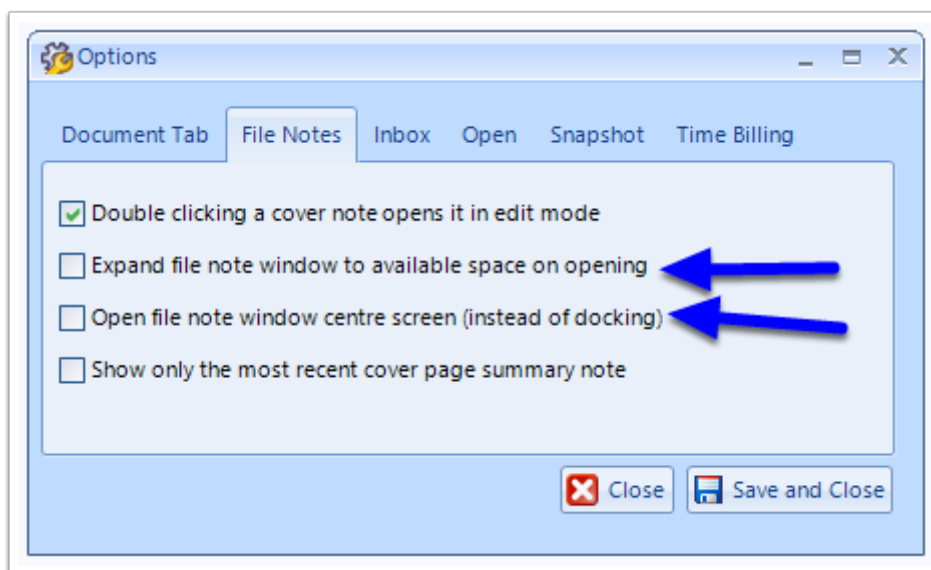


The Signature will now be your default Portal Signature.



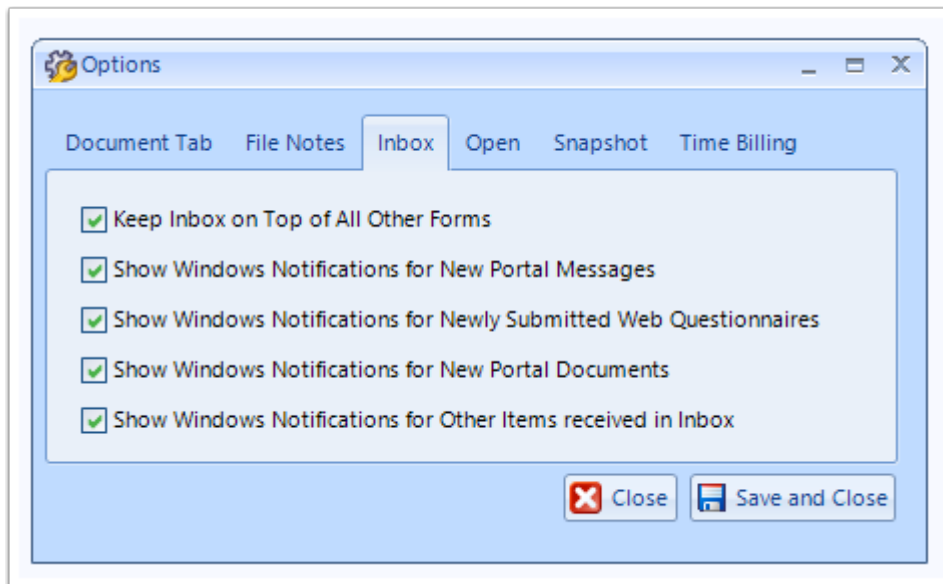
## 4. File Notes

The File Notes options are for controlling how File Notes appear to the user. For new users these can all be left to the defaults - though if you have a HD or wider monitor you may want to set File Notes to expand to the available space, whereas if you have a small screen you may want the File Note to always open in the middle of the screen instead of being docked to the matter.



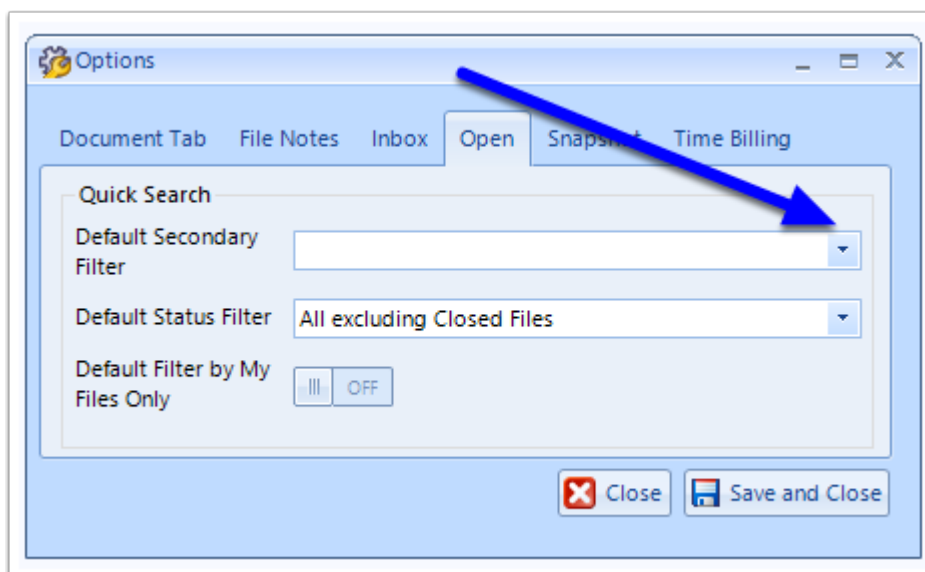
## 5. Inbox

The Inbox options control how you receive notifications for items arriving in your Inbox. For new users most of these options should be left as the default.



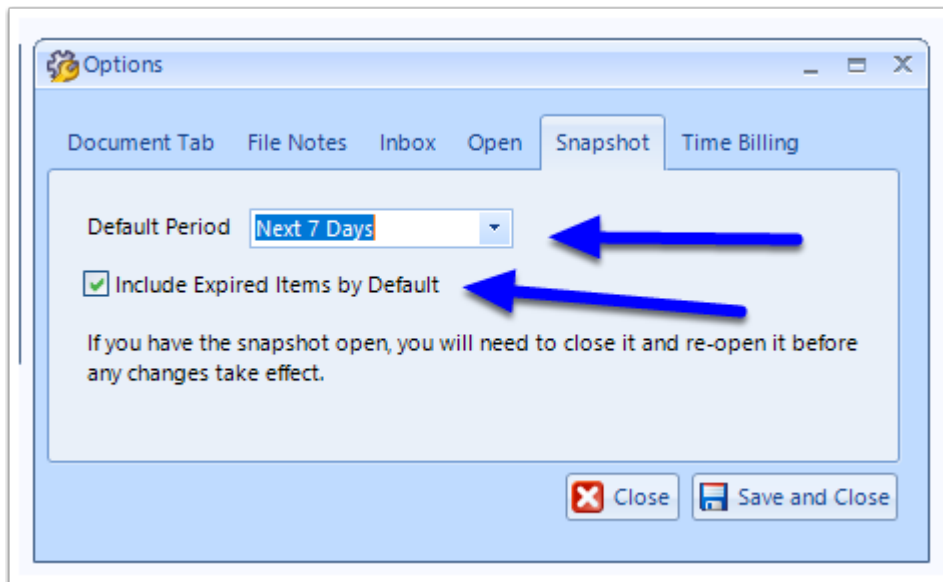
## 6. Open

The Open options controls the user's preferences for the Open window. If you are always searching for files using a particular search filter i.e. matter type, it is recommended that you set this as your default secondary search filter.



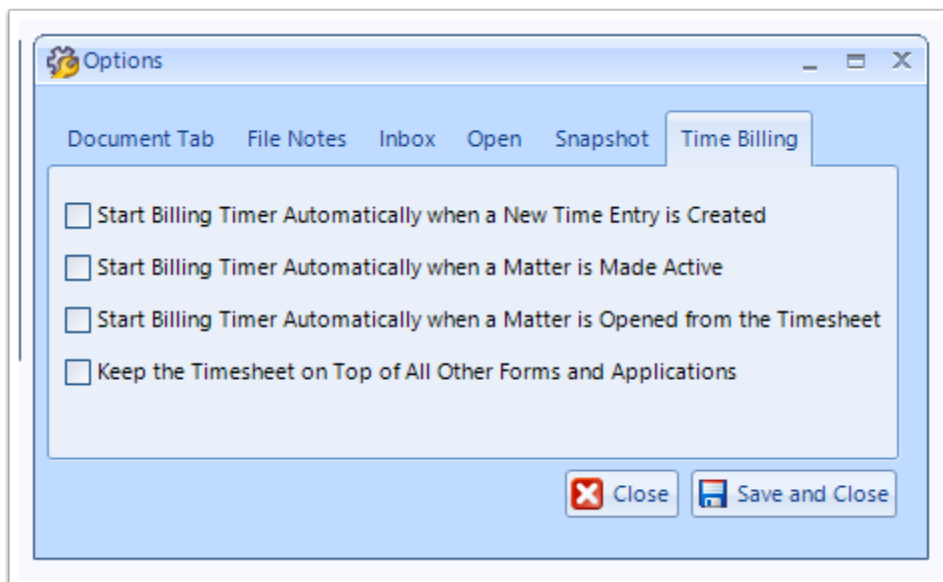
## 7. Snapshot

The Snapshot options control how much information is presented to the user by default when viewing the snapshot. For new users we recommend that you set the default period to 7 days and that the information includes expired item.



## 8. Time Billing

The Time Billing user options controls how the Time Biller works. These settings are only relevant to you if you will be recording time spent on matter (often for accounting/billing purposes) The settings you choose here will depend on whether you want to automate certain actions with the billing when you perform other actions. For example, you can set the billing timer to automatically start recording time for a matter the moment you open that matter.



## 9. Finish

When you have finished setting your user options, click **Save & Close**. Note that you can always return to this window via **Tools > User Setup Guide**