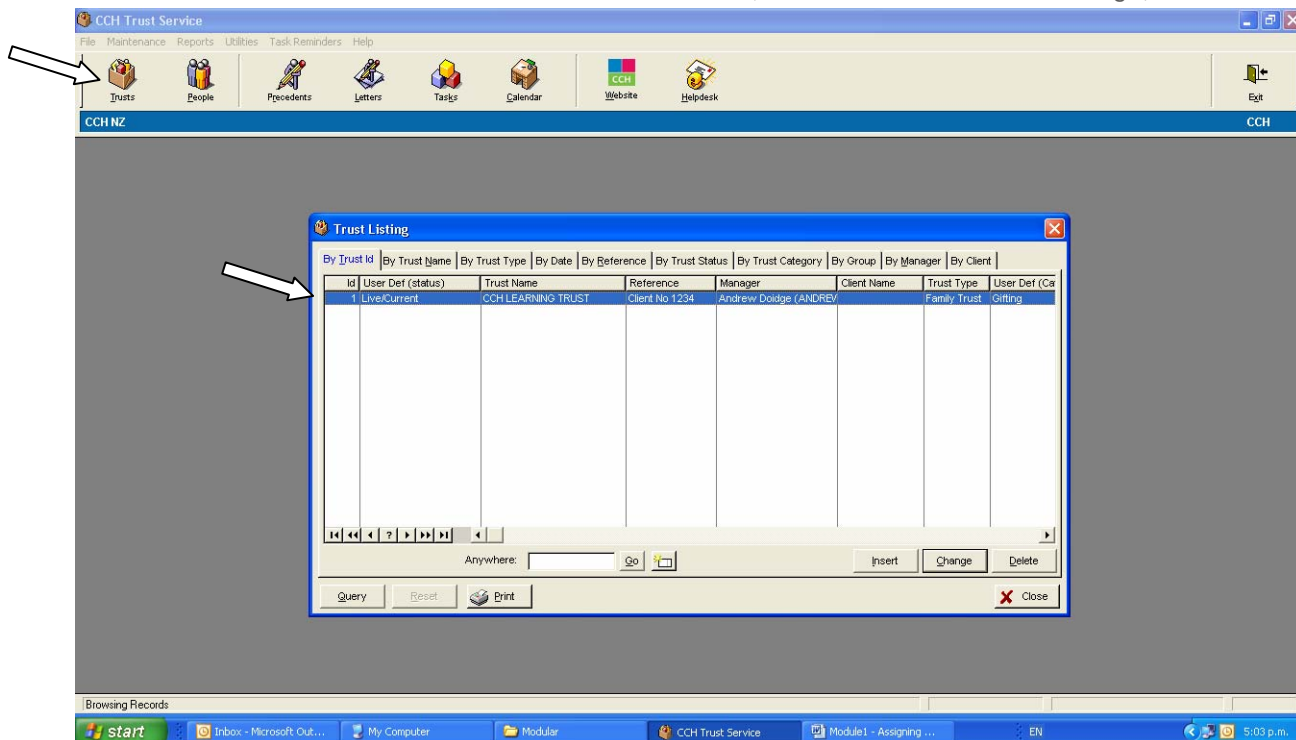


TRUST SERVICE TRAINING - LEVEL 1

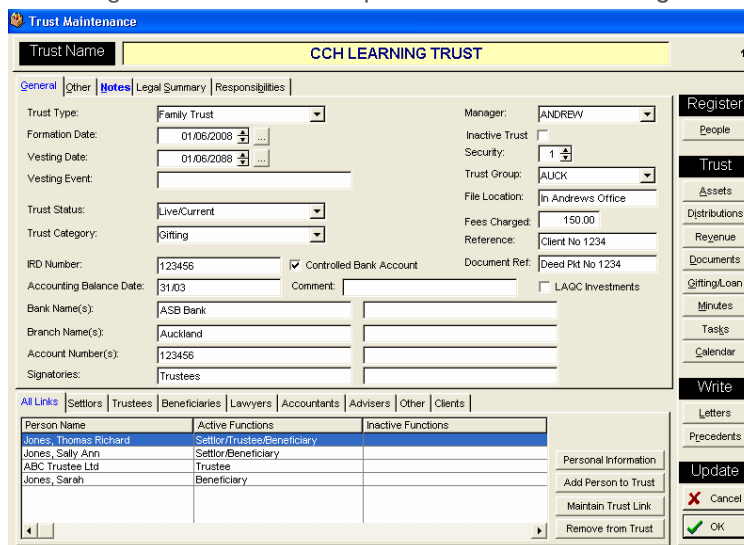
SESSION 2.2

DOCUMENT REGISTER

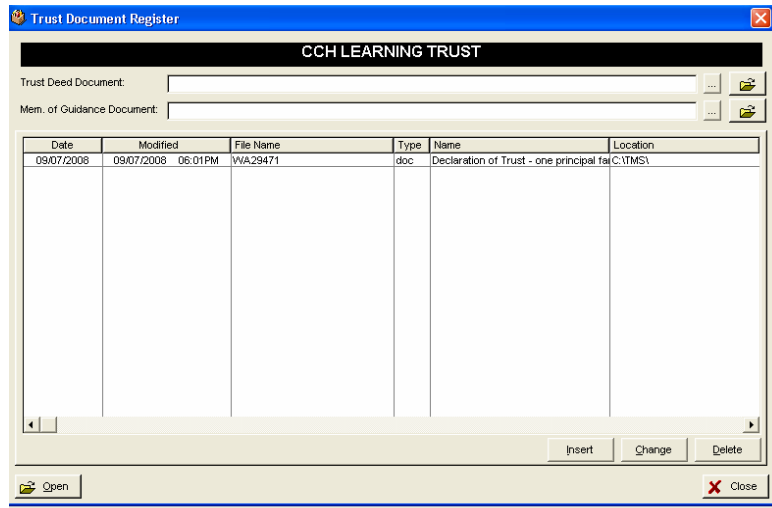
Select Trust Shortcut, then select Trust from List (double click or select Def Change)



Select Documents from Right Hand Menu to open the Document Register



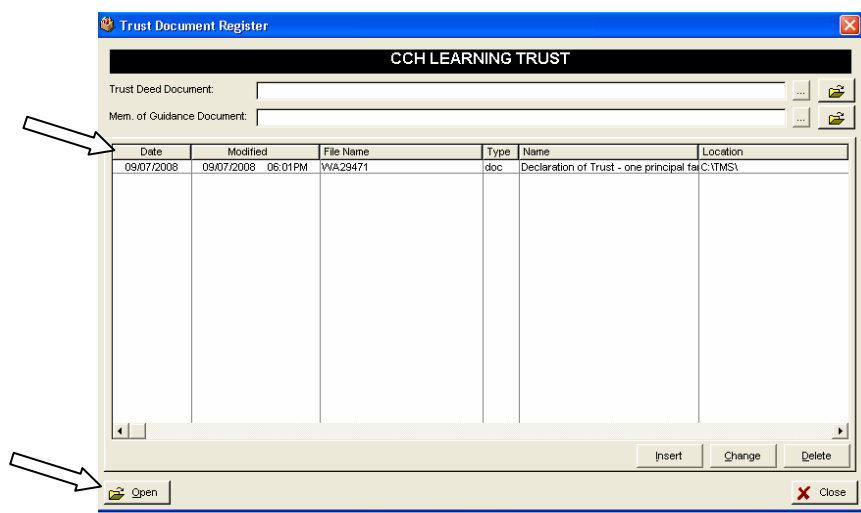
This is the Document Register. It can be set to record the creation of all documents via the Trust Service.



Note: Whether Documents are automatically added to this list or not is controlled by the user settings. See **Session 5** for details.

Action Point: Do we need to review our User Settings?

To Open a document from the Document Register

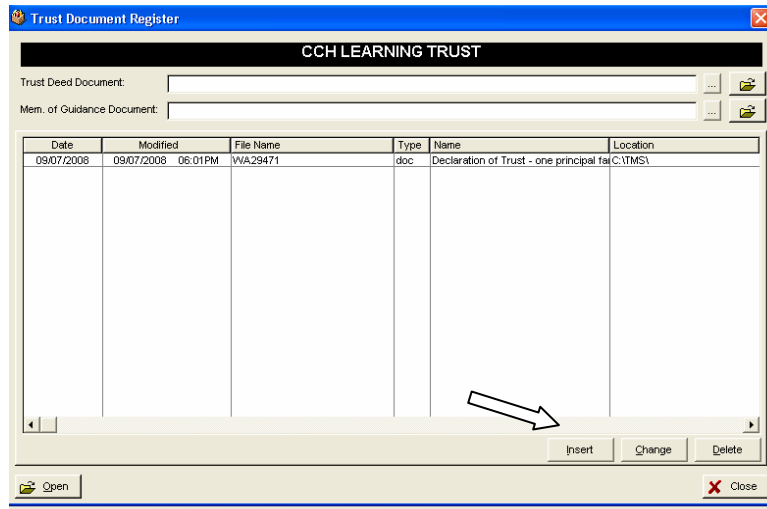


Highlight a document on the list, Select **Open**, Document opens in Word

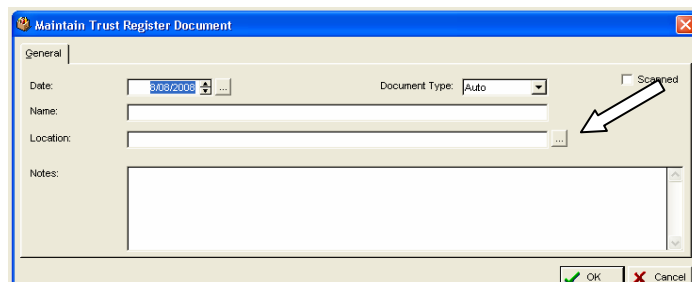
Note: If you make changes to the document this event is not recorded in the document register. There is no functionality to record and track changes.

To Add a document to the Document Register that was not created in the Trust Service

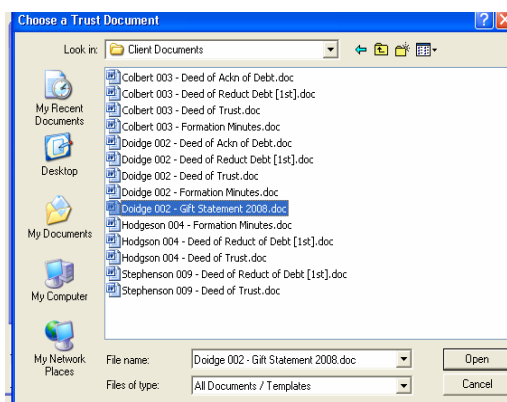
Select Insert



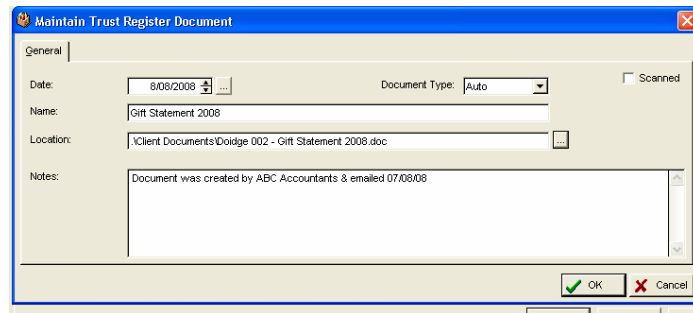
Select the square box at the end of the Location field and browse your PC or network for the document you wish to Add



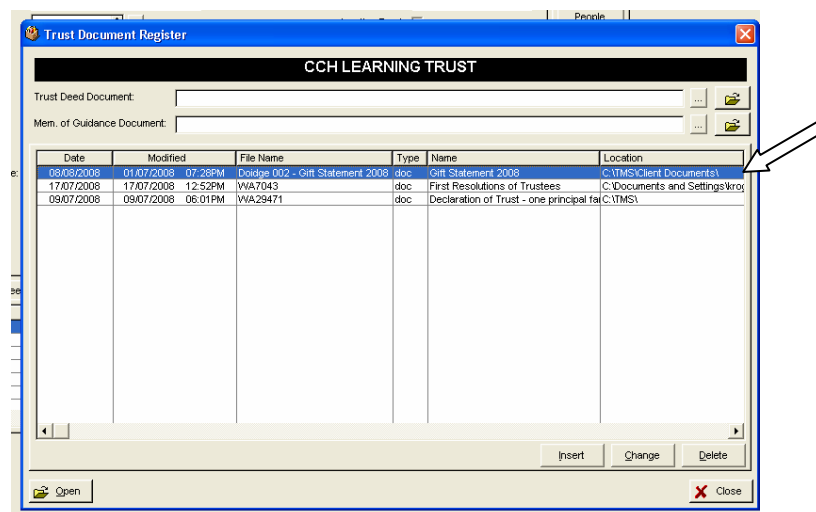
Select the document you wish to Add, double click.



Type a name for the document and add any notes if appropriate & select OK



Your document is now added into the Document Register and can be opened directly from the Trust Service

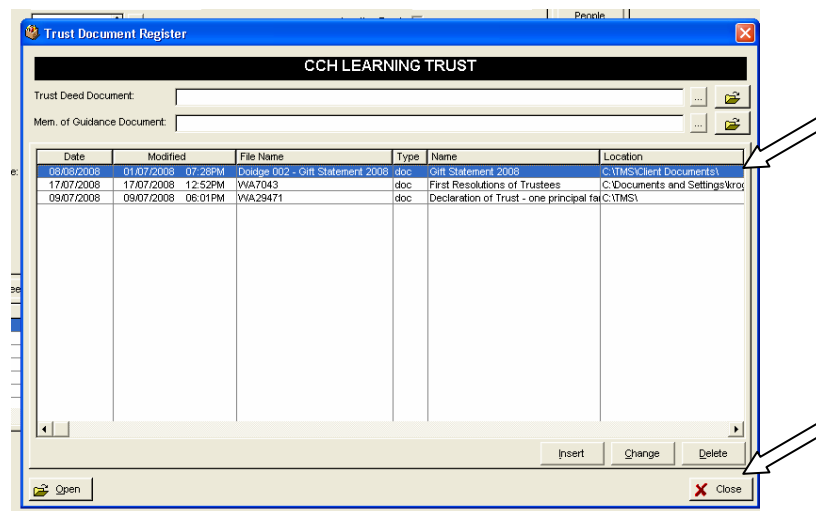


Remember - if you want your documents which have been created in the Trust Service to be automatically added to the Document Register you must set this option in User or User Groups (Session 5)

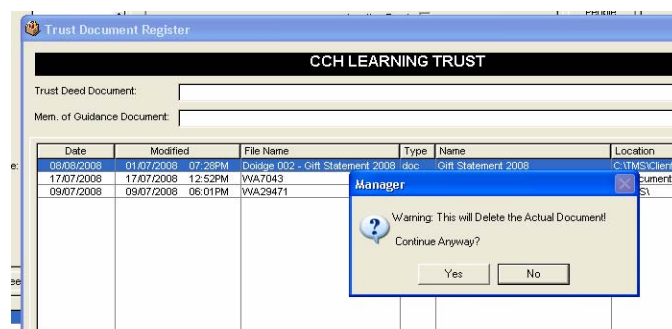
To remove a document from the Document Register

Select the document you wish to remove. It does not matter if this document was created in the Trust Service or not.

Then select Delete



You will see a warning message "This will Delete the Actual Document". Select Yes, then Select OK



You have now deleted both the actual document and the link to the Trust Service

If you wish to keep a copy of the actual document you must save a copy elsewhere or change the name or location of the original before deleting from the Trust Service

Using a separate Document Management System

If you have a separate document management system in place you may need to create your document as per Session 2.1 then **Save As** into the appropriate location/system.

You can use both the Document Register and a separate document management system together or you may chose to bypass document register altogether.

If your document management system requires you to enter details as the document is created in Word this can cause conflicts with the Trust Service. If you have this issue please discuss your specific requirements and/or issues with the CCH Trainer.