

TRUST SERVICE TRAINING - LEVEL 1

SESSION 2.4 - REVIEW

REVIEW

In this session we learned how to:-

- ⇒ Create documents from the CCH Templates using the Precedent Wizard
- ⇒ Understand & Use the Document Register
- ⇒ Create a Page in the Minute Book
- ⇒ Add minutes from the CCH Templates to the Minute Book
- ⇒ Create a Minute Document using the Minute Wizard

Action Points

Question	✓	Session Required	Date
Do I have all the Standard CCH Templates installed?		Contact Support if not	
Does Word start automatically from the Precedent Wizard on completion of Step 4		Contact Support if not	
Do you need more information on the User Settings which will allow you to add the 'Confirm Document Setting' screen (after Step 3 in Precedent Wizard)		Session 5	09/10/08
Do you need to change your User Setting to 'Always Add' documents to the Document Register		Session 5	09/10/08
Do I want to add any of my own company precedents or documents to the Trust Service Document Library		Session 8	20/11/08
Do I want to customize any of the Trust Service Standard Document Templates to reflect my corporate image? E.g change font, layout or add a logo?		Session 8	20/11/08
Do I have a separate Document Management System that is causing me difficulties with Trust Service Documents?		Discuss with CCH Trainer	
Do I need to add any Minute Templates to the Minute Library?		Session 9	04/12/08
Do I want to make any changes to the Minute Document Template? E.g change fonts, layout or add a logo?		Session 9	04/12/08
Do I need to add a Resolutions Template to the Document Library?		Session 9	04/12/08
Do I need to create any 'Combined Minutes'?		Session 9	04/12/08
Has this session highlighted the need for Customized Trust Service Training?		Discuss with CCH	