

TRUST SERVICE TRAINING - LEVEL 1

SESSION 4.6

REVIEW

In this session we learned how to:-

- ⇒ Add a Task to the Task List
- ⇒ Add a Task to the Calendar
- ⇒ Add a Task using the Task Library
- ⇒ Set up Tasks Templates in the Task library
- ⇒ Complete a Task
- ⇒ View the Task Reminder List
- ⇒ Print the Task Report

Action Points

Question	✓	Session Required	Date
Do you have the appropriate user privileges? This will be controlled by someone in your organization		Discuss internally	
Do you need to change user privileges?		Session 5	09/10/08
Do we need to set up our Task Library?		Discuss internally	
Do we need to agree a policy on Task usage, for example all using Outlook or all using Trust Service?		Discuss internally	
Do we need to clear out all old tasks that have not been completed?		Discuss internally	
Do we want to change our user settings to display the task list on start of day?		Session 5	09/10/08
Has this session highlighted the need for Customized Trust Service Training?		Discuss with CCH	