

# TRUST SERVICE TRAINING - LEVEL 2

## SESSION 5

### OVERVIEW

In this session we will learn how to:-

- ⇒ Add & Maintain Users
- ⇒ Understand User Groups
- ⇒ Add & Maintain Managers
- ⇒ Add & Use Trust Groups
- ⇒ Set and Use Security Settings
- ⇒ Set Up & Use Responsibilities

### Prerequisites for Level 2, Session 5

- ⇒ The Trust Service Software is Installed at your office
- ⇒ You have the latest version, 4.2
- ⇒ You are familiar with the basic functions in the Trust Service Software, adding a Trust, maintaining records, etc.
- ⇒ You are familiar with using database's in general
- ⇒ You have User Access Level 9

### Preparation for Level 2, Session 5

- ⇒ Print the Session Notes
- ⇒ Set up Webex Meeting Manager on your PC, ideally the day before the session in case you have any difficulties
- ⇒ Dial into the Meeting, using the Link & Password provided 5mins prior to start time