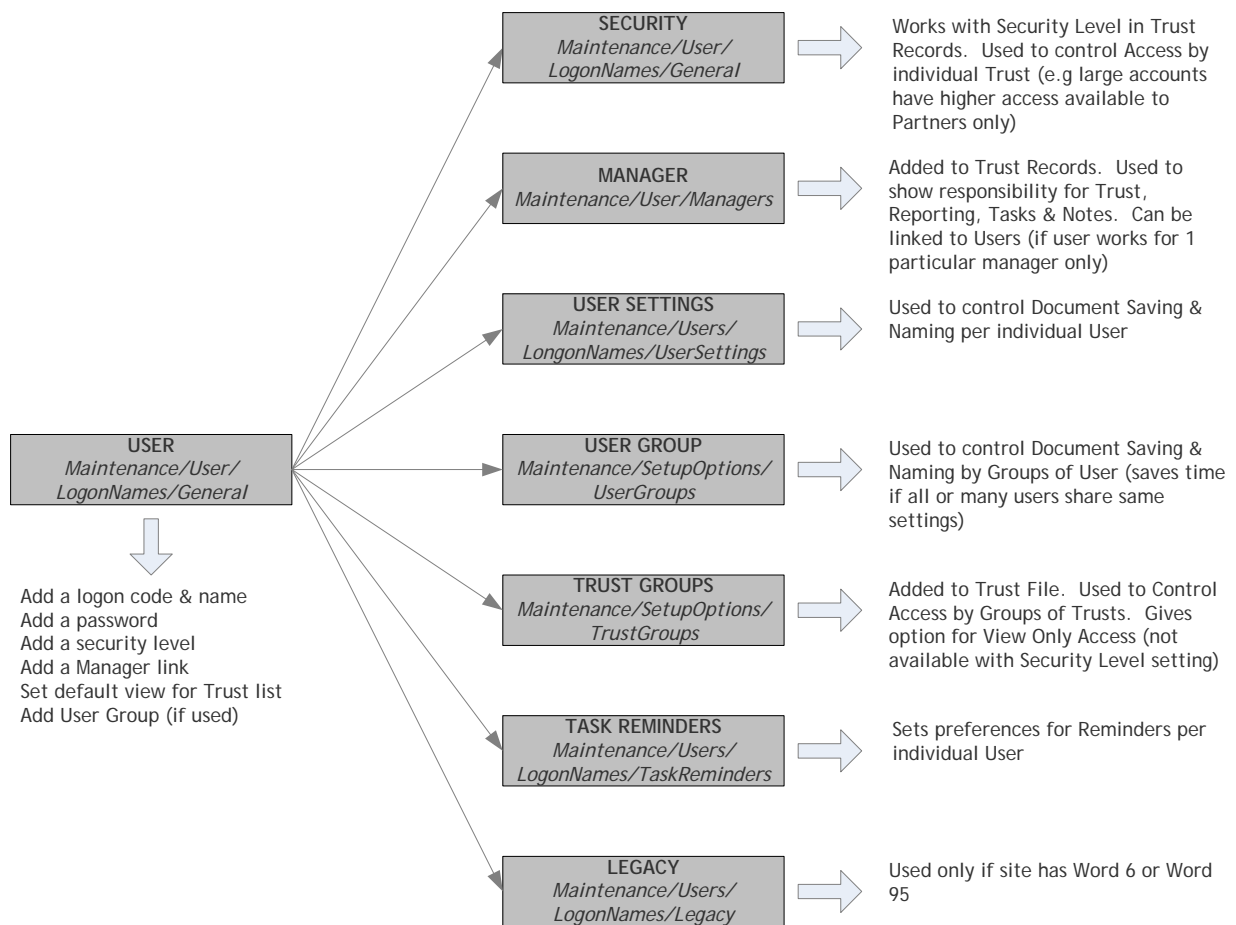


# TRUST SERVICE TRAINING - LEVEL 2

## SESSION 5.1

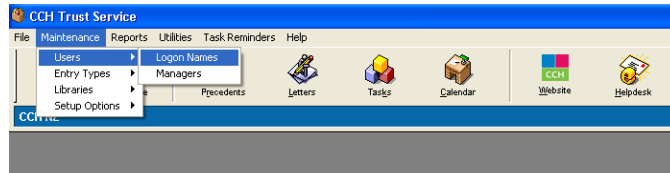
### UNDERSTANDING TRUST SERVICE USER SETTINGS

To set up Users correctly within the Trust Management Service you need to understand a number of other areas of the system. These are the areas explored in Session 5

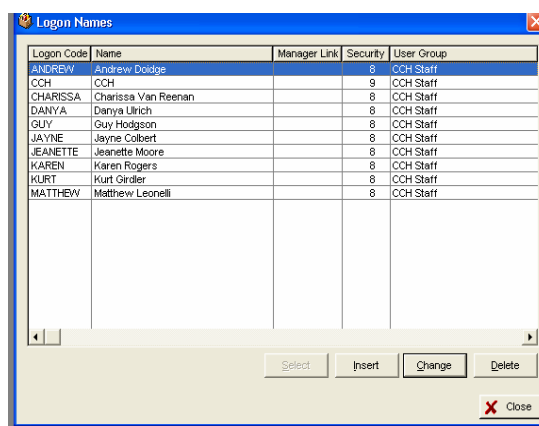


## ADDING A NEW USER OR CHANGING USER SETTINGS

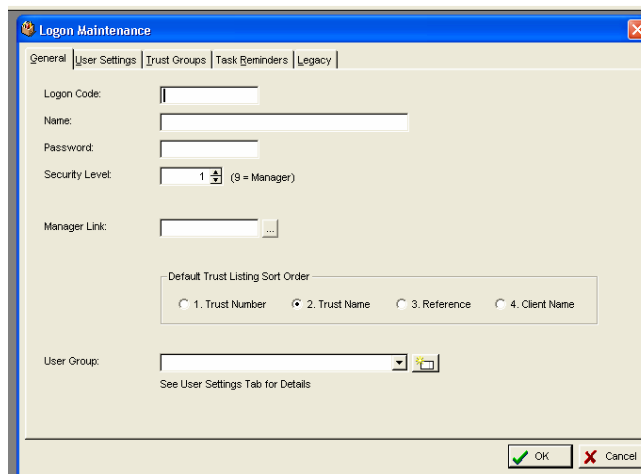
Select Maintenance, select Users, select Logon Names



Select Insert or highlight name & select Change



This opens the Logon Maintenance Screen



Type Logon Code, Full Name & Password

[Go to Session 5.2 to learn more about security Levels](#)

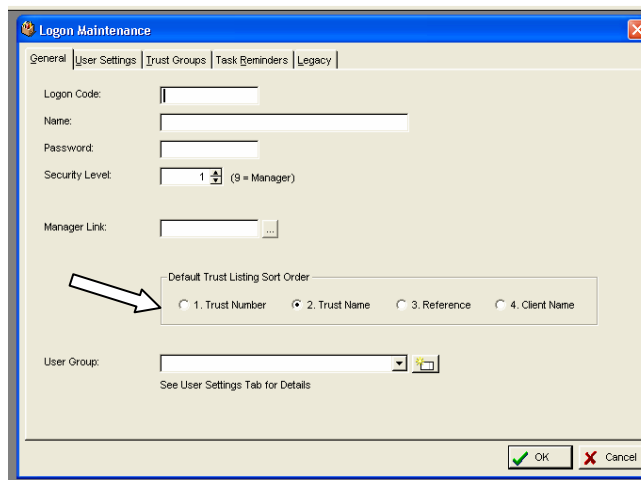
Select or Type the appropriate Security Setting for this User

**Go to Session 5.3 to learn more about Managers**

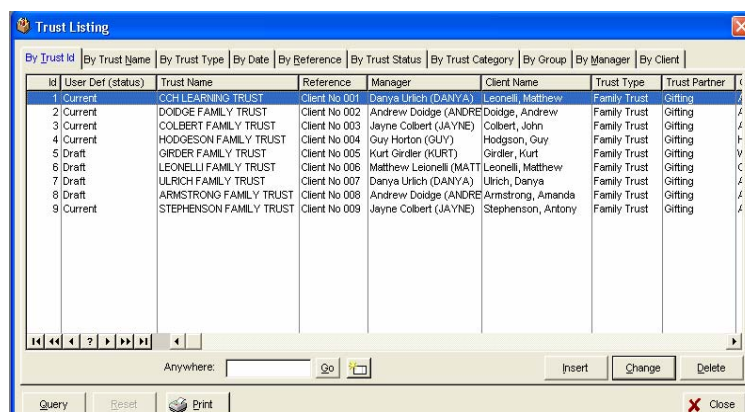
Select the appropriate **Manager** or leave blank if this User does work for multiple Managers

Note: If a User is linked to a Manager, the Manager field will be automatically populated with that information when adding Tasks, etc. It is best to leave this blank if Users are doing work for multiple Managers

Select the default view of the **Trust Listing** for this User



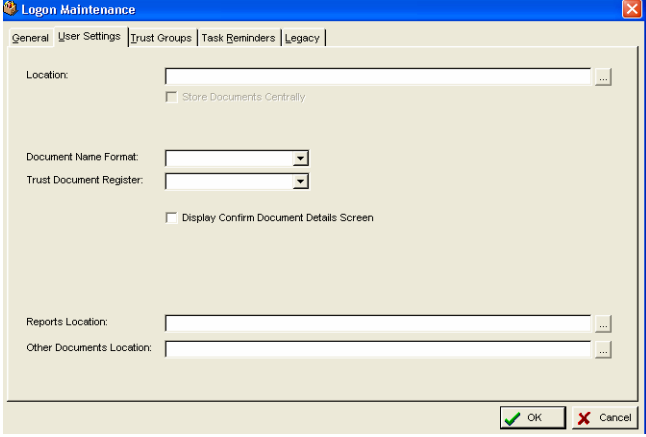
The default view will control which tab is shown on the **Trust Listing** when this User enters the system.



Set the view for each individual User. The User may select a different view by clicking on another tab at any time during their session. The default will always be the first view shown at log in.

## Go to Session 5.4 to learn more about User Groups

Select the appropriate **User Group** for this User if required. If you are not setting up a User Group, go to User Settings



The screenshot shows the 'Logon Maintenance' dialog box with the 'User Settings' tab selected. The dialog has several fields and checkboxes:

- Location:** A text input field with a browse button (...).
- Store Documents Centrally
- Document Name Format:** A dropdown menu.
- Trust Document Register:** A dropdown menu.
- Display Confirm Document Details Screen
- Reports Location:** A text input field with a browse button (...).
- Other Documents Location:** A text input field with a browse button (...).

Buttons at the bottom right:  and .

Select the **location** for documents created by this user to be saved, e.g. M:/Clients/Andrews Clients

Select the appropriate **Document Name Format** (as per User Group Setting, see 5.4)

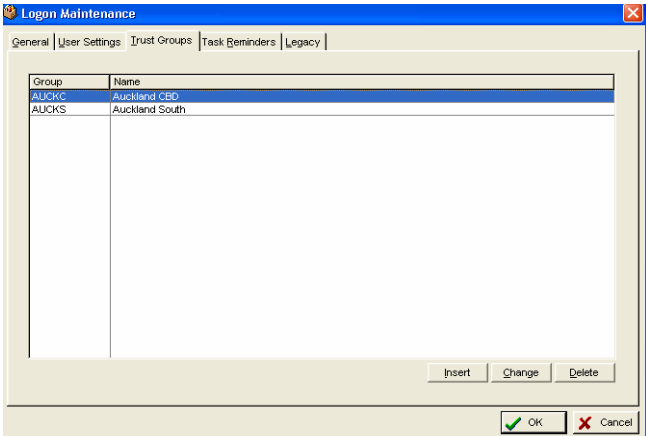
Select the appropriate **Trust Document Register Settings** (as per User Group Setting, see 5.4)

Select '**Display Confirm Document Details Screen**' if appropriate (as per User Group Setting, see 5.4)

Select the **location** for Reports or Other Docs created by this user to be saved.

## Go to Session 5.5 to learn more about Trust Groups

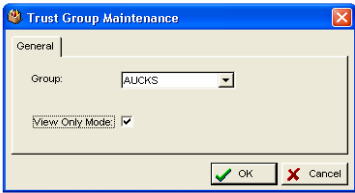
Insert appropriate **Trust Group** or Groups as required. Set selected Groups as **View Only** if necessary



The screenshot shows the 'Logon Maintenance' dialog box with the 'Trust Groups' tab selected. It displays a table of trust groups:

Group	Name
AUCKS	Auckland CEP
AUCKS	Auckland South

Buttons at the bottom right: , , , , and .



The screenshot shows the 'Trust Group Maintenance' dialog box with the 'General' tab selected. It has the following fields:

- Group:** A dropdown menu with 'AUCKS' selected.
- View Only Mode

Buttons at the bottom right:  and .

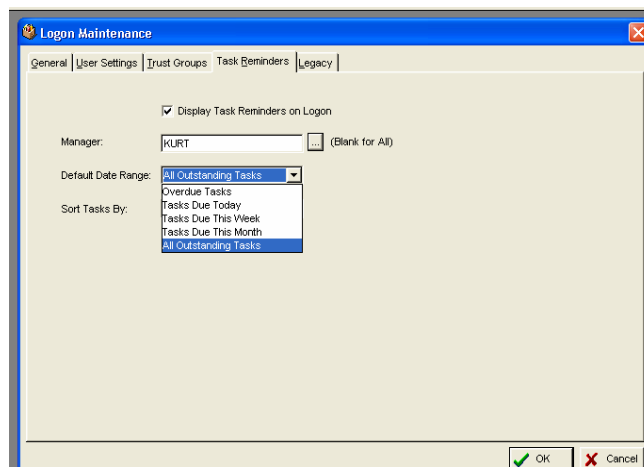
## Task Reminder Settings

Check **Display Task Reminder on Logon** if you want the reminder list to appear for this User.

If this Users works only for 1 Manager, select that Manager. Only Tasks for this Manager will now appear on the list

Select the **Date Range** for the Reminder list

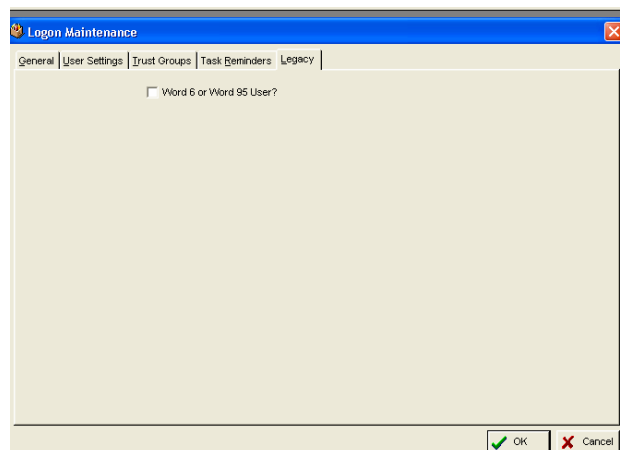
Select how you would like the Tasks to be sorted



**Note:** You can open the Reminder List at any time when the Trust Service is open by selecting **Task Reminder** on the top tool bar. This will show tasks for all Managers and give the full selection of data ranges. See Notes from Session 4 for more information on Tasks

## Legacy

If you are using Word 6 or Word 95 you will need to check the box in Legacy to ensure compatibility



Your User Settings are now complete.  
Click OK to save