TRUST SERVICE TRAINING - LEVEL 2
SESSION 5.4

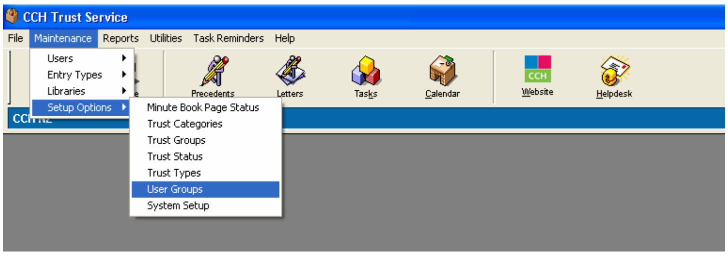
USER GROUPS

User Groups control how and where documents are saved for particular groups of users
User Groups can reduce the amount of configuration you need to do behind each User if the setting are the same for all or most of the Users.

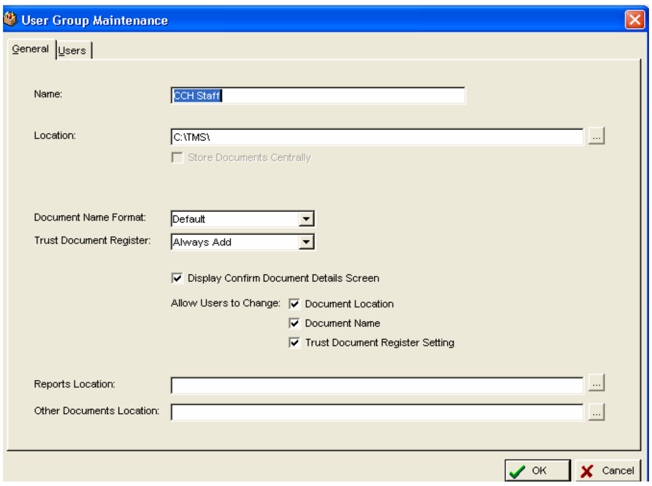
> *Note: The same information contained in a User Group can be configured behind each individual User if their requirements are unique*

ADDING A USER GROUP

Select **Maintenance**, select **Setup Option**, select **User Groups**



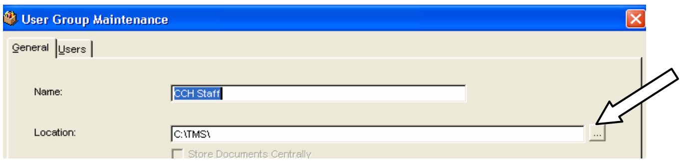
Select **Insert**



Type a **Name** for your **User Group** that explains what this group is for, for example, Auckland Office or Andrews Team

The following Settings can also be used behind each individual Users
To set these for an individual rather than a Group see Session 5.1

Select the **Location** that this **User Groups** will save any documents to; use the small box at the end of the field to search your network for the correct location

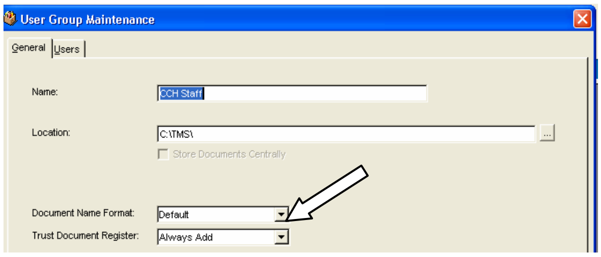


If your client folders are on the M:\drive it might look like this

M:\Clients\

Users would then need to select the correct client folder only rather than having to browse for M:\clients first.

Select the **Document Name format** for this **User Group**. This is the name that the system will give the document when it is created. You do get the opportunity to change this name (see Session 2.1) but it is a good idea to use a default name initially.



Options

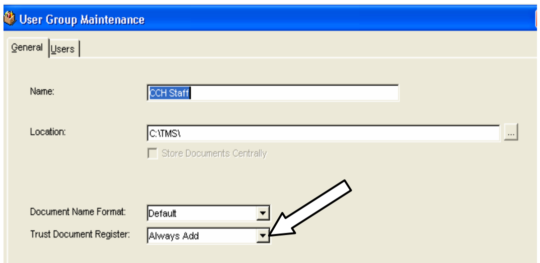
1) Default – will give a unique/random numerical reference that does not relate specifically to the Trust information, for example WA2056

2) Document Reference – will give a name specific to the Trust, Date & Document, for Example;

STEPHENSON FAM – 08-08-15 – PREC 1
TRUST NAME – DATE (American format) – PRECEDENT NUMBER

Trust Document Register

The Trust Document Register keeps a record of all documents that are created for the Trust. You can select whether or not you wish to record the documents you create (See Session 2.2 for more information on the Document Register)



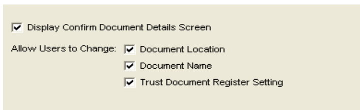
Options

1) Always Add – every document added is automatically added to the Trust Document Register

2) Never Add – documents are never added to the document register

Unless you are using a separate document management system we recommend you select **Always Add**

Display Confirm Document Details Screen



Check box for

1) **Display Confirm Document Details Screen**
   This brings up an additional screen after Step 3 of Precedent Wizard (Session 2.1) to allow the user to confirm or change details. There are 3 items they may edit, shown in the 3 tick boxes

2) **Document Location**; if you have set the default location to M:\Clients, checking this box will allow users to then select the individual client folder under M\Clients. The can also change the location completely if they chose, but the default will take them to M\Clients.

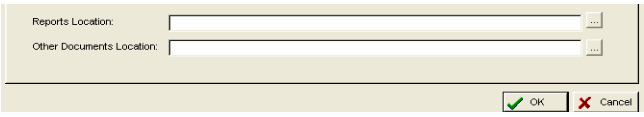
3) **Document Name**; User can change document name if required

4) **Trust Document Register Settings**; User can chose not to add this document into the Document Register. Default will be to add.

Set Report & Other Document Location

Select the Location that this User Groups will save any Reports & Other Documents to; use the small box at the end of the field to search your network for the correct location

Other Documents are those not directly linked to a Trust, for example, an export file containing information on multiple trusts.



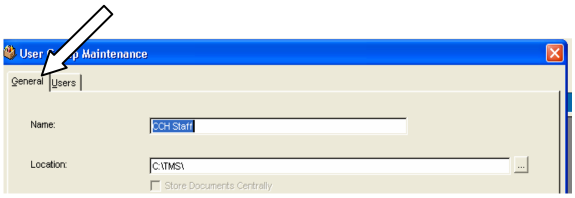
ADDING USER TO A USER GROUP

There are 2 ways to add Users to a User Group

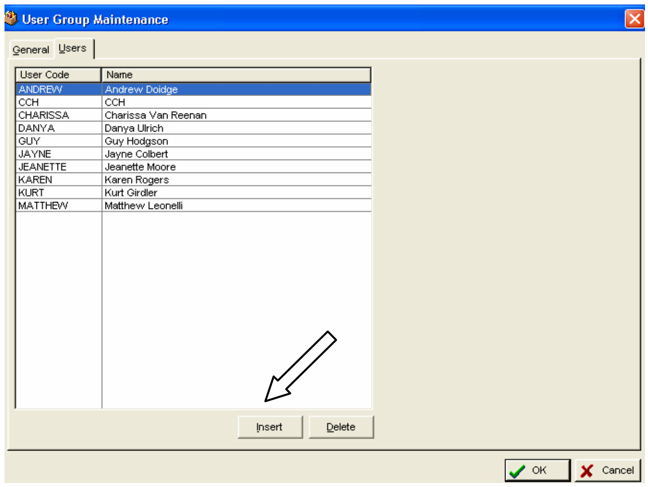
1) Via **User Group** Screen
2) Via Individual **User Logon** Screen

1) User Group Screen

Select **Users** tab

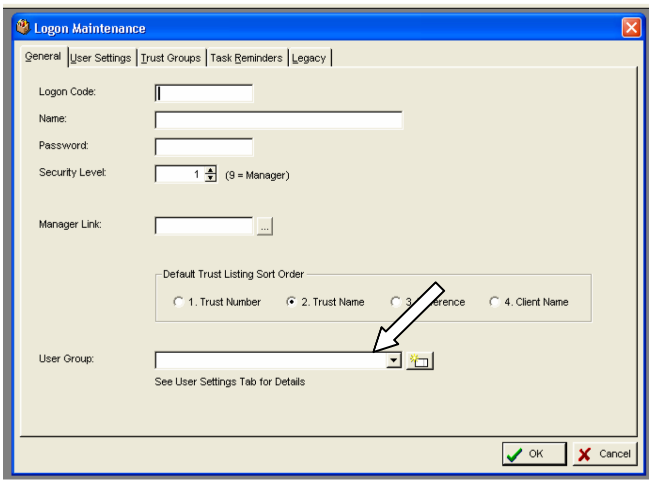


Select **Insert** to add **Users** to this **User Group**



2) User Logon Screen

Select **Maintenance,** select **Users,** Select **Logon Names,** Highlight **User** on list & Select **Change**



Select the **User Group** for this **User**

Examples of how you might use User Groups

Example 1 – Some users in the office only do work on Family Trusts whilst others only do work on Corporate/Trading Trusts

USER GROUP 1	**USER GROUP 2**
Name: Family Function: These users manage all Family Trusts Location: M:\Private Clients\ Document Name: Default Document Register: Always Add Display Confirm Document Details Screen – tick all Report Locations: M:\Private Clients\Reports Other Document Locations: M:\Private Clients\Docs	Name: Corporate Function: These users manage all corporate clients, Investment Trusts & Trading Trusts Location: M:\Corporate Clients Document Name: Default Document Register: Always Add Display Confirm Document Details Screen – tick all Report Locations: M:\Corporate Clients\Reports Other Document Locations: M:\Corporate Clients\Docs

Users with the Family User Group will automatically save all documents under the 'Private Clients' area on the firms network
Users with the Corporate User Group will automatically save all documents under the 'Corporate Clients' area on the firms network

Example 2 - Some Users only do Trust work for Andrew and others only do Trust work for Matthew

USER GROUP 1	**USER GROUP 2**
Name: Andrew Function: These users work only on Trusts for Andrew Location: M:\Andrews Clients\ Document Name: Default Document Register: Always Add Display Confirm Document Details Screen – tick all Report Locations: M:\Andrews Clients\Reports Other Document Locations: M:\Andrews Clients\Docs	Name: Matthew Function: These users work only on Trusts for Matthew Location: M:\Matthews Clients\ Document Name: Default Document Register: Always Add Display Confirm Document Details Screen – tick all Report Locations: M:\Matthews Clients\Reports Other Document Locations: M:\Matthews Clients\Docs

Return to Session 5.1 to set the User Group or User Settings