

# TRUST SERVICE TRAINING - LEVEL 2

## SESSION 5

### REVIEW

In this session we learned how to:-

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

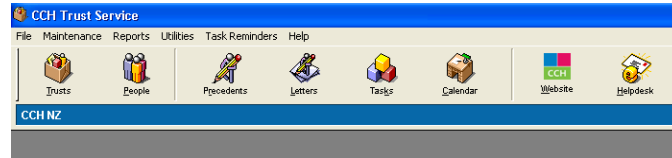
### Action Points

Question	✓	Session or Action Required	Date
Do I have the correct access level to make system changes? (controlled by someone in your organisation*)		Discuss internally	
Do we need to review our security settings & policy for the Trust Service? Do we need to ensure all users have a password?		Discuss internally	
Do I have all the Manager I need set up? Have I set up Users as Managers in error? Do I need to link my users with a Manager?		Discuss internally	
Do I need to review User Settings or implement User Groups?		Discuss internally	
Do I need to implement Trust Groups?		Discuss internally	
Do I need to set Task Reminders for Users		See Notes on Session 4	
Do we want to use Responsibilities?		Discuss internally	
Has this session highlighted the need for Customized Trust Service Training?		Discuss with CCH	

\* It is possible to lock yourselves out of the System Setup Options in the Trust Service if you set all User Access Levels below 9. If this is the case, call Support on 0800 500 224 and they can get you back in.

For further help:

Select Help to access the Trust Service Help Files



Visit [WWW.CCH.CO.NZ](http://WWW.CCH.CO.NZ) for training notes on previous session, notes are posted approx 7 days prior to the next session. You can access training notes for session you are not attending.

Contact Tech Support 0800 500 224 for technical issues

Email [Krogers@CCH.co.nz](mailto:Krogers@CCH.co.nz) if you have 'how to' questions. Emails are answered 1day per week only, usually on Thursday or Friday