

TRUST SERVICE TRAINING - LEVEL 3

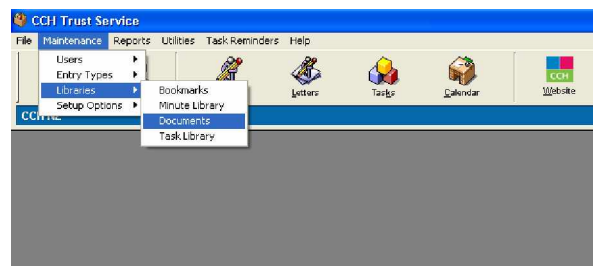
SESSION 9.1

CUSTOMIZING THE STANDARD CCH MINUTE DOCUMENT TEMPLATES

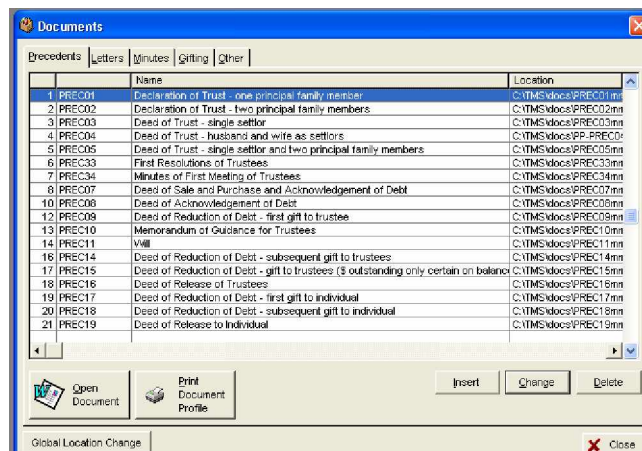
The Trust Service comes with a standard Minute document template. You are able to customise this document. You must have Access Level 9 to complete any Customisation in the Trust Service

Templates are saved in the Document Library

Select Maintenance, select Libraries and select Documents



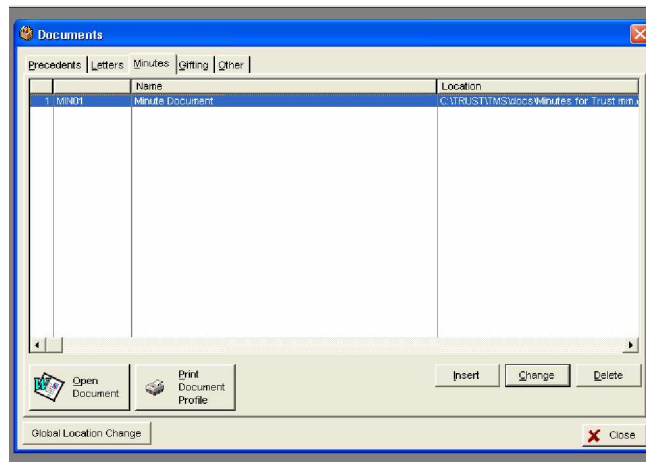
This is the Document Library



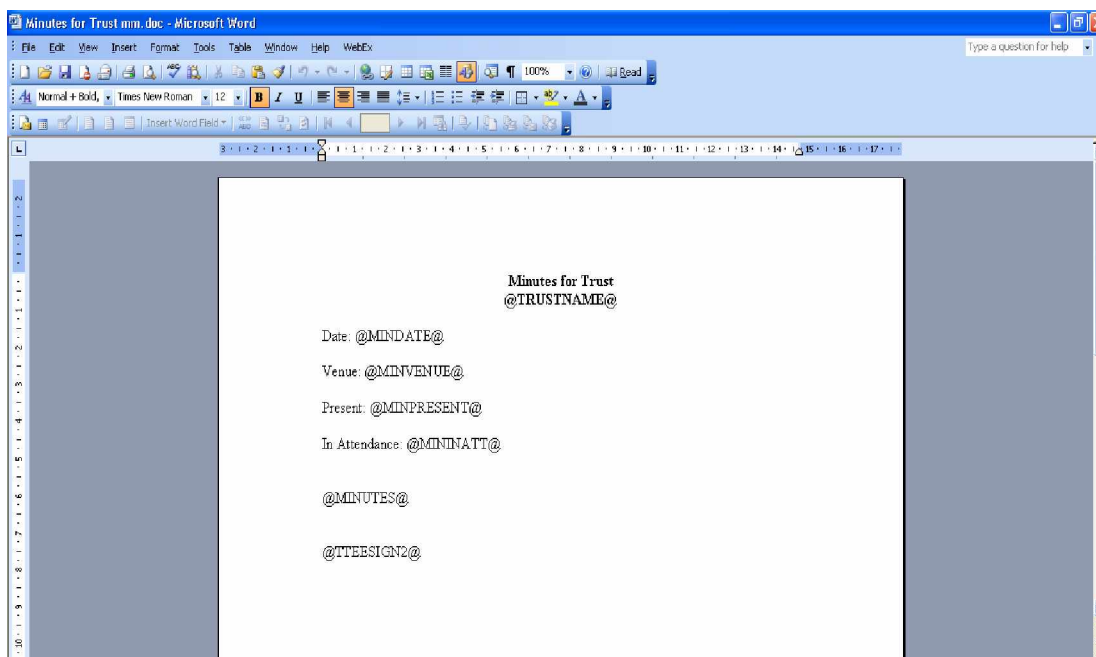
Select Minutes

CUSTOMISATION

Highlight the Minute Document, select Open Document



This Opens the Template in Word



You can now customise this template as required.

Note: any text shown as @TEXT@ is a Bookmark (merge field). This is where information is inserted from the database. If you remove this text you remove the opportunity to insert information.

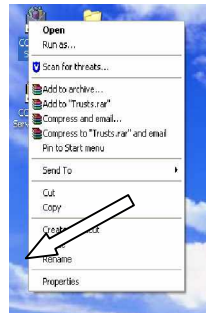
Save the changes to the document in Word and Close.

The Template is now updated

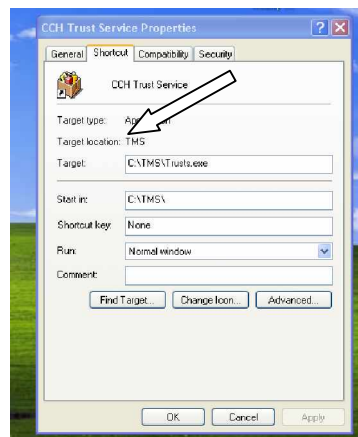
CUSTOMISATION OF STYLE FILE

If you want to change the font of your document you will also need to change your Font in the Style File

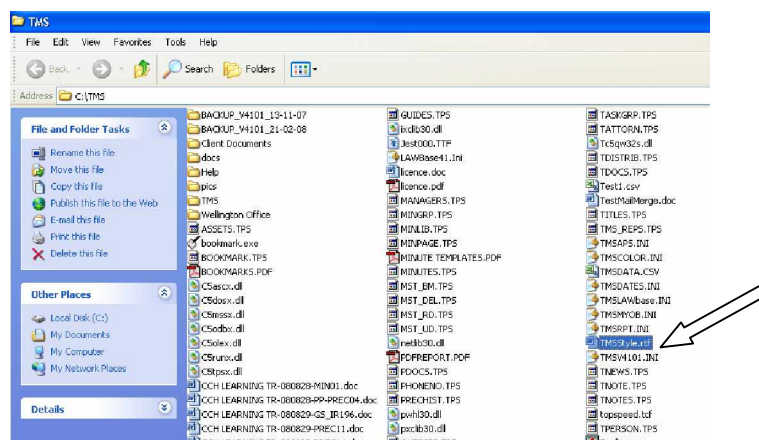
1. First locate your TMS Folder if you do not already know where this is.
 - a. Right mouse click on the TMS shortcut on your desk top.
 - b. Select Properties



- c. Note the location of your TMS Folder



2. Go to TMS and Open the file names TMSstyle.rtf



3. In the Style File there are a number of Style settings. You only need to change the one related to the Minute Document as below

@STIL06 Minutes

@MINSUBJECT

@MINNOTE

Highlight this section in your Style File and change it to your required Font type, size and colour. Save & Close

CUSTOMISED DOCUMENTS & UPGRADES

All Standard Templates are overwritten during the Upgrade process to ensure that you have the most up to date information based on the latest legislation.

You may want to keep a copy of your customised documents away from the TMS folder so that these can be copied back in after the Upgrade if required. You will need to check the content of each document before you do so in case any important changes have been made. You will also find information in the release notes on which documents have been updated.