

TRUST SERVICE TRAINING - LEVEL 3

SESSION 9.2

The Trust Service comes with a Minute Document Template. This assumes that a meeting has taken place and includes information on venue and attendees. You may want to set up a Resolutions Document Template for situations where a meeting has not taken place.

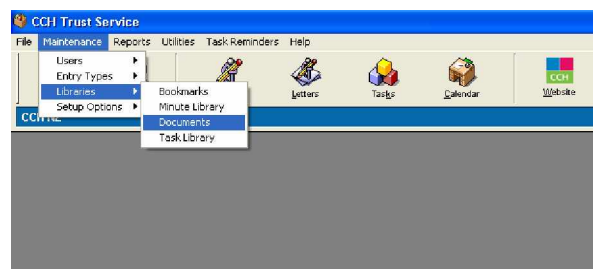
CREATE YOUR OWN DOCUMENT RESOLUTIONS TEMPLATE

There are 4 Steps to creating your own Resolutions Templates

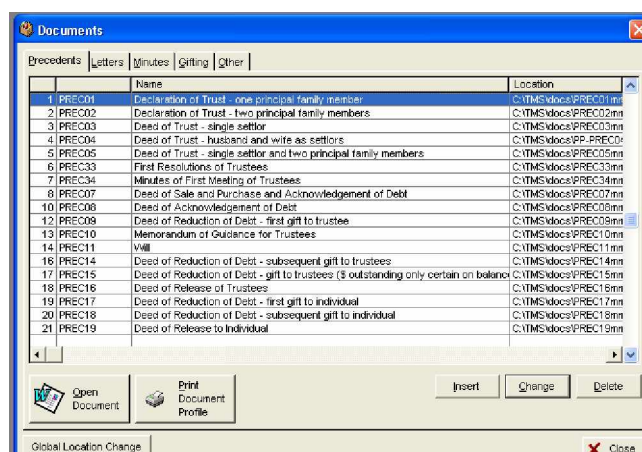
1. Create your template, based on a copy of the Minute Document Template
2. Insert your template into the Trust Service Document Library
3. Customise the Template
4. Complete the Authors Notes & Bookmark List - Optional

STEP 1 - Creating a Template

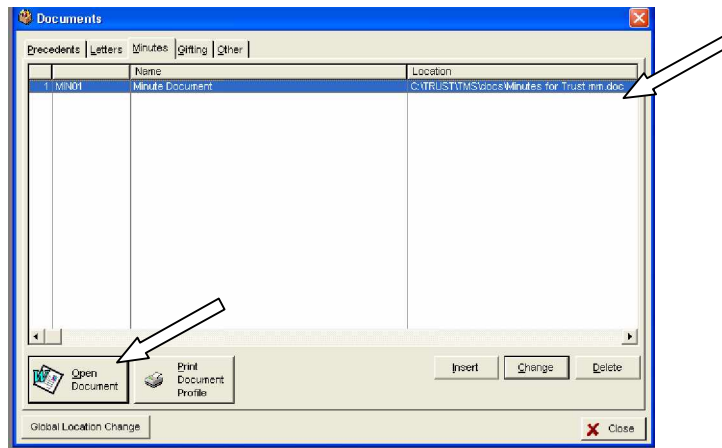
Open the document library - Select Maintenance, select Libraries and select Documents



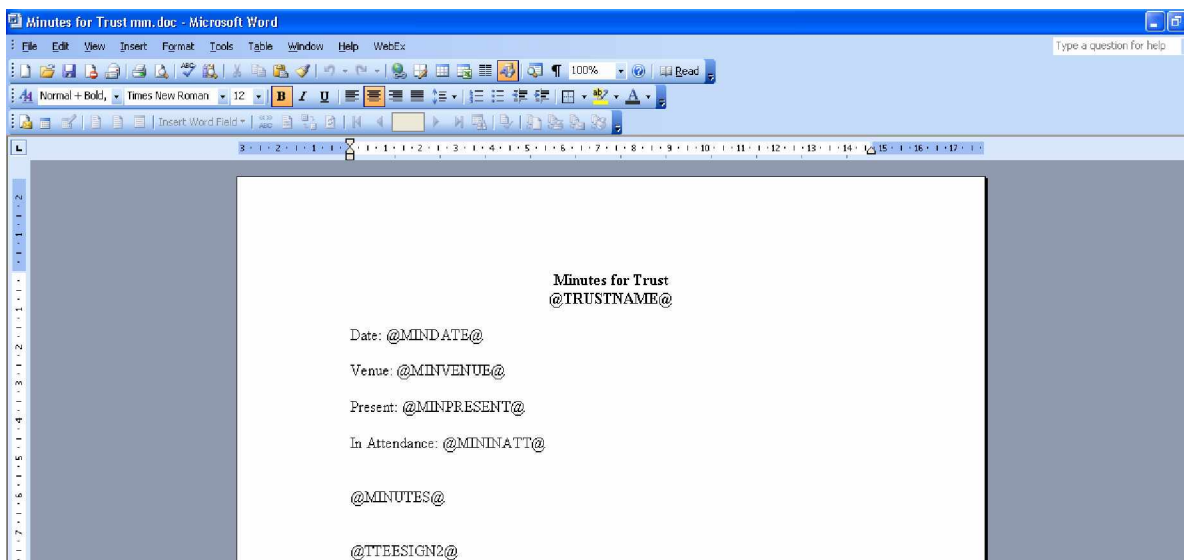
This is the Document Library



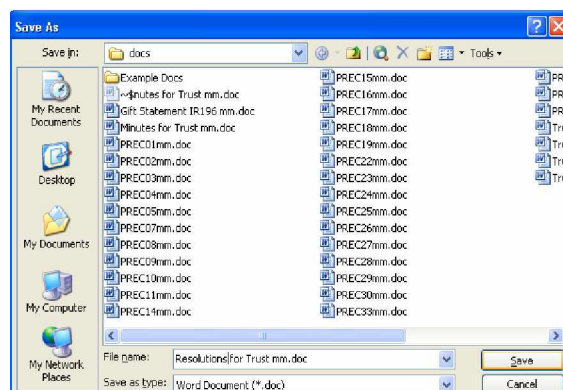
Select the Minutes tab



Note the location of the file. Select Open Document

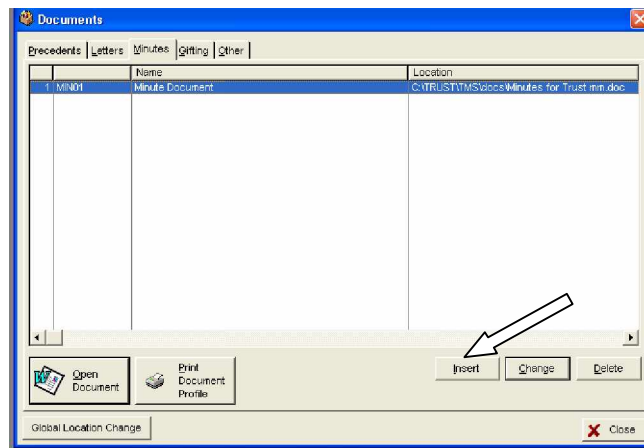


Select File/Save As and Save the template into TMS\DOCS (usually found on the L:\ or T:\ drive). Name the Template Resolution for Trust

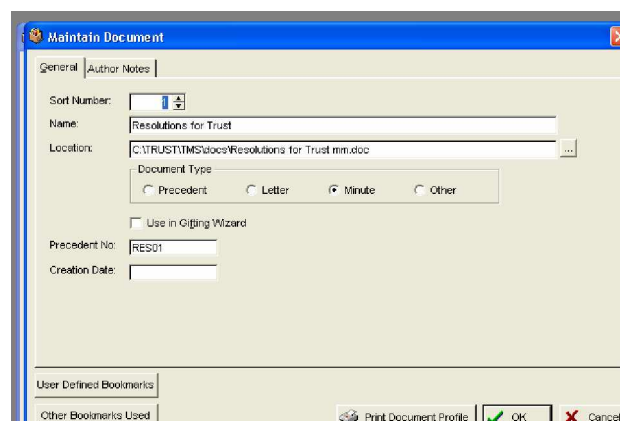


STEP 2 - Inserting a Template into the Document Library

Return to the Document Library (Minute Tab)



Select Insert



Type or select the Sort order - this will determine where the document appears on the list

Type the Name of your Template Resolutions for Trust

Use the Search Box at the end of the Location box to browse your network and find your template

Select the Type of Template you are creating - this will put the document into the correct Wizard when you want to use the Template to create a document

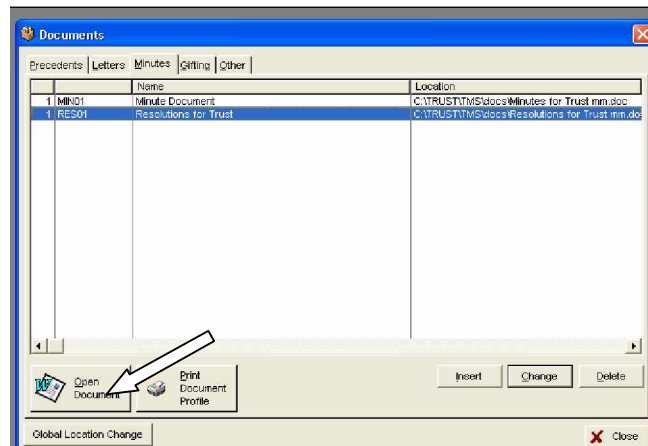
Type a Precedent Number

Type a Creation Date

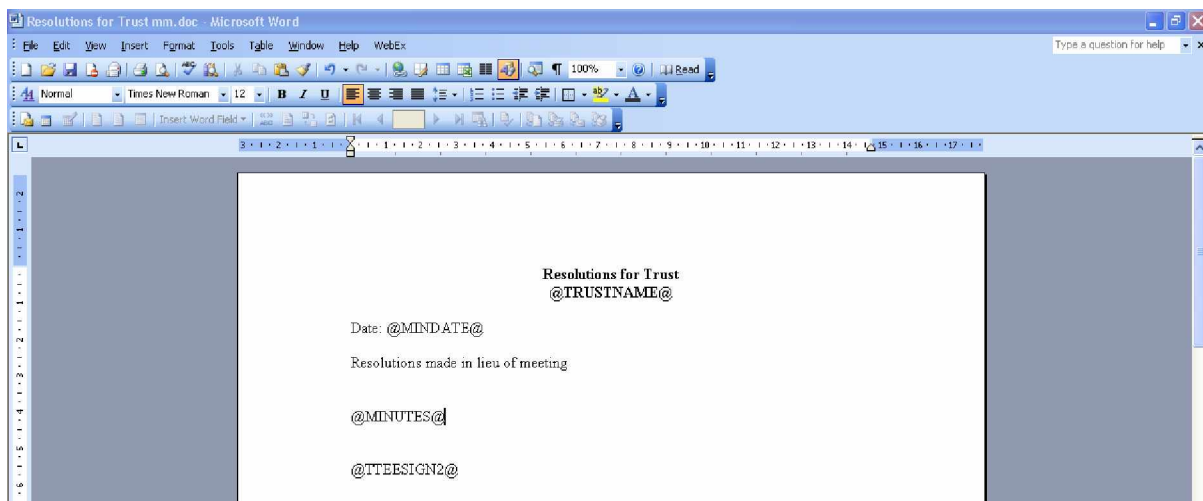
Select OK to Save

STEP 3 - Customise the Template

Highlight your new Template and select Open Document



You can now turn this into a Resolutions Document.



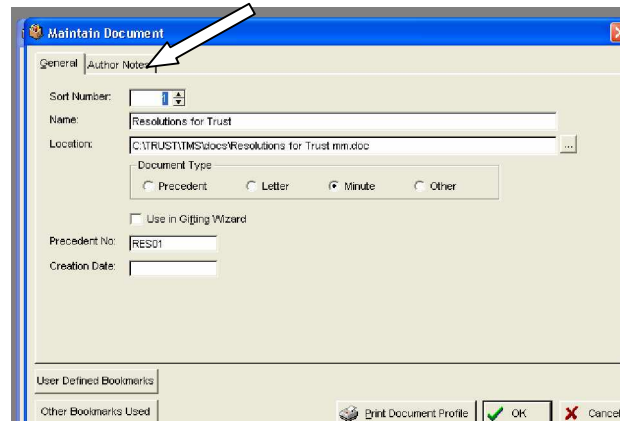
If you want to add any additional merge fields to import more data into this document see notes on Session 8 for details of how to do this.

Save & Close the template in Word

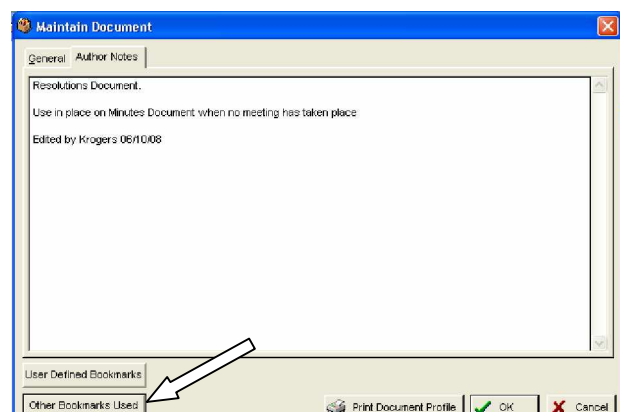
STEP 4 - Completing the Authors Notes

This step is optional but is recommended as good practice.

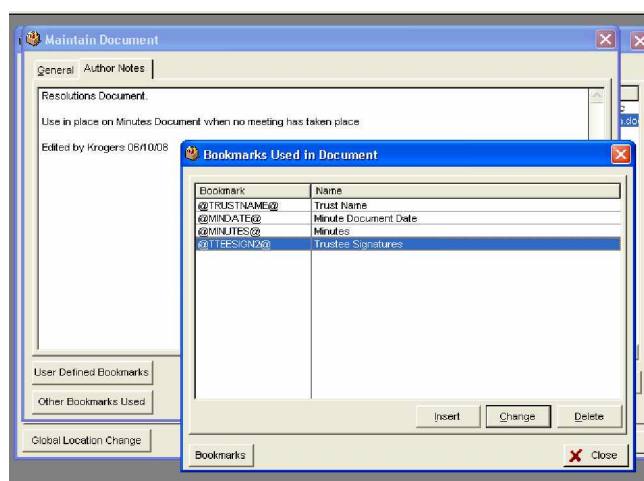
In the Document Library (MAINTENANCE/LIBRARIES/DOCUMENT), highlight your Template & select Change



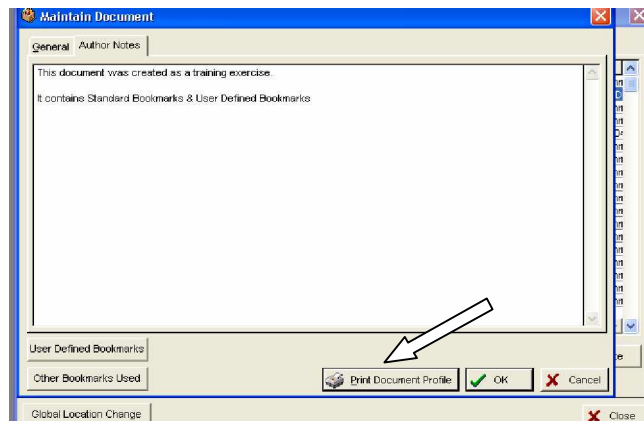
Select Authors Notes & Type some information about this document and it's use.



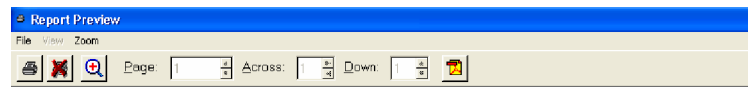
Select Other Bookmarks Used & Insert all Standard Bookmarks used in this Template



You can now select Print Document Profile.



The Document Profile contains information on why the document was created and what information is going to be inserted from the database via the Bookmarks



Document Profile
CCHNZ

Printed: 6/10/08 10:24

Document Name: Resolutions for Trust
Document Location: C:\TRUST\MMS\docs\Resolutions for Trust.mn.doc
Precedent No: RES01
Creation Date:

Author Notes

Resolutions Document.
 Use in place on Minutes Document, when no meeting has taken place
 Edited by Krogers 06/10/08

Standard Bookmarks Used

Bookmark	Description
@TRUSTNAME@	Trust Name
@MINDATE@	Minute Document Date
@MINUTES@	Minutes
@TRESIGN@	Trustee Signatures

You can use these profiles as a dictation tool or as a form for partners to complete when they want a document produced. This will ensure that you are always given the full information you need for each document.

Your Resolutions Template is now complete & ready to use.