

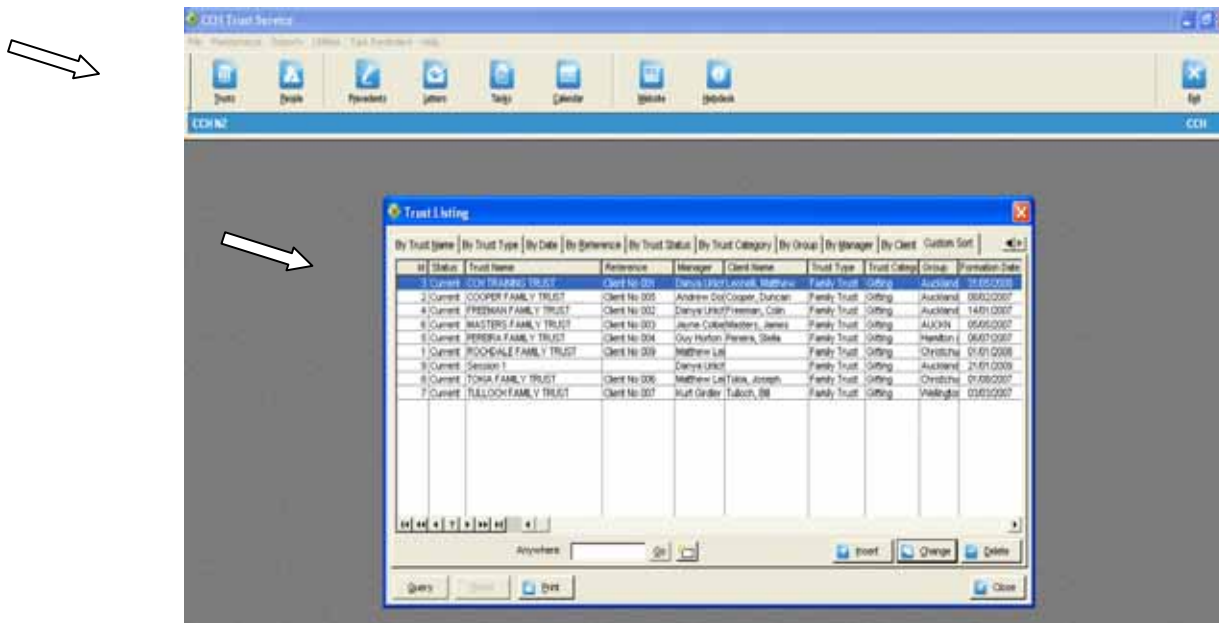
SESSION 3.3

LEVEL 1

DOCUMENT REGISTER

The document register allows you to create a hyperlink between both documents that are created within the software or which can be manually linked if they are created outside the software. The advantage is that it allows you to quickly access all documents created for a individual trust.

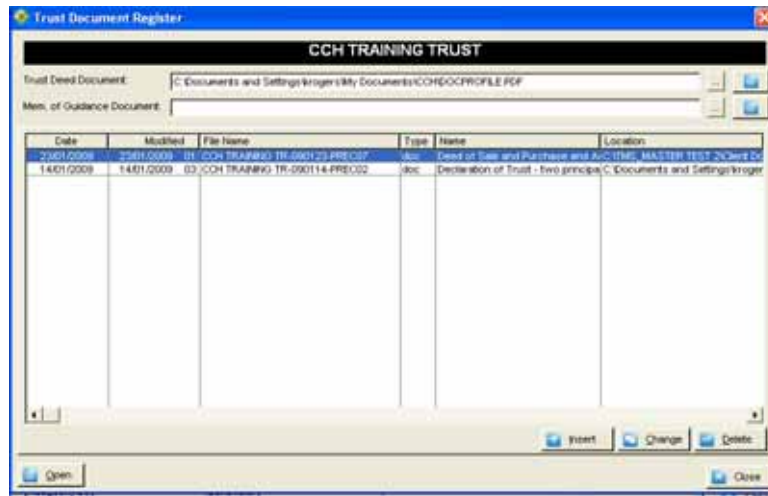
Select Trust Shortcut, then select Trust from List (double click or select Change)



Select Documents from Right Hand Menu to open the Document Register

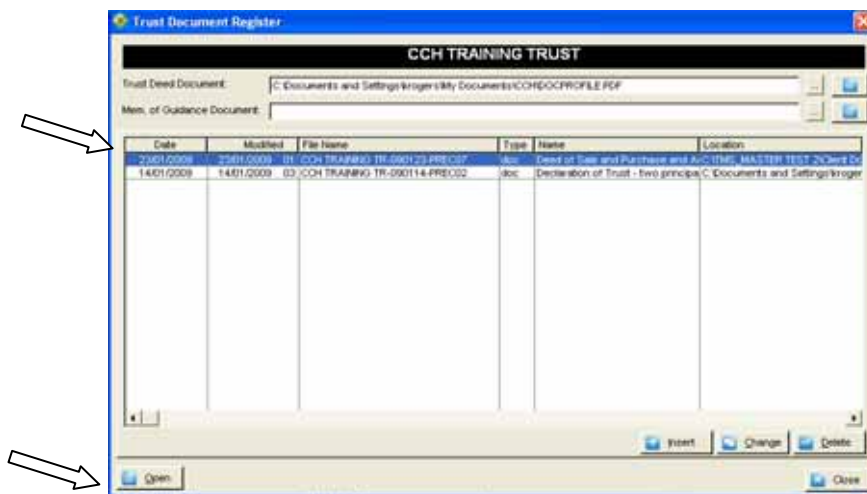


This is the Document Register. It can be set to record the creation of all documents via the Trust Service.



Whether Documents are automatically added to this list or not is controlled by the user settings. To learn more about this feature see notes on Session 5

To Open a document from the Document Register

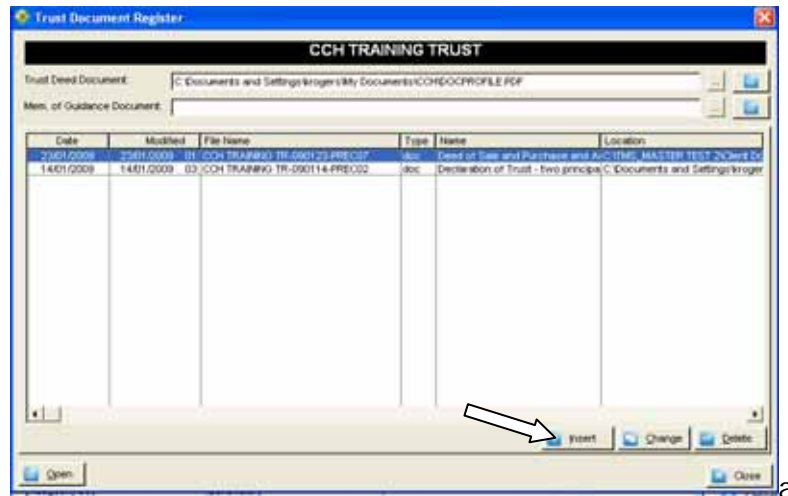


Highlight a document on the list, Select Open, Document opens in Word

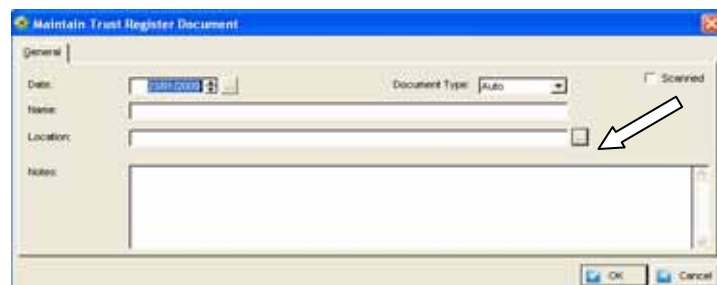
If you make changes to the document this event is not recorded in the document register. There is no functionality to record and track changes/versions.

To Add a document to the Document Register that was not created in the Trust Service

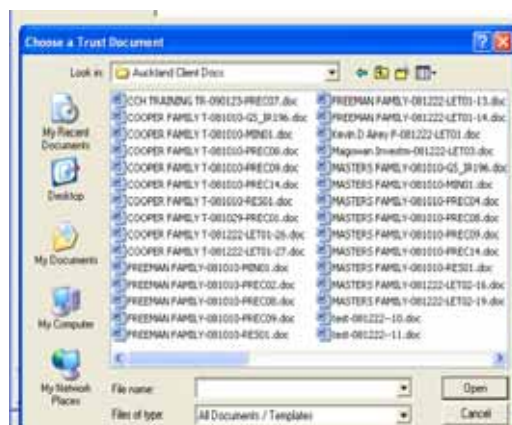
Select Insert



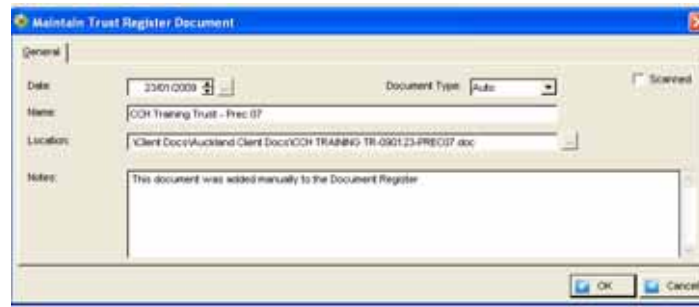
Select the square box at the end of the Location field and browse your PC or network for the document you wish to Add



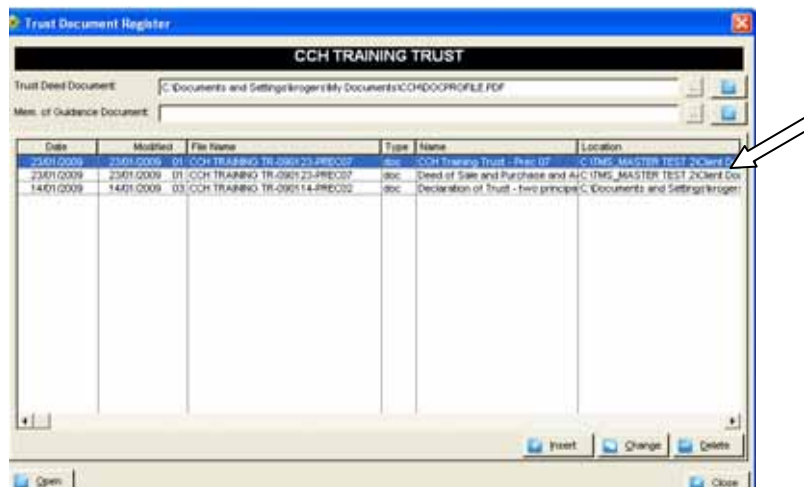
Select the document you wish to Add, double click.



Type a name for the document and add any notes if appropriate & select OK.



Your document is now added into the Document Register and can be opened directly from the Trust Service.

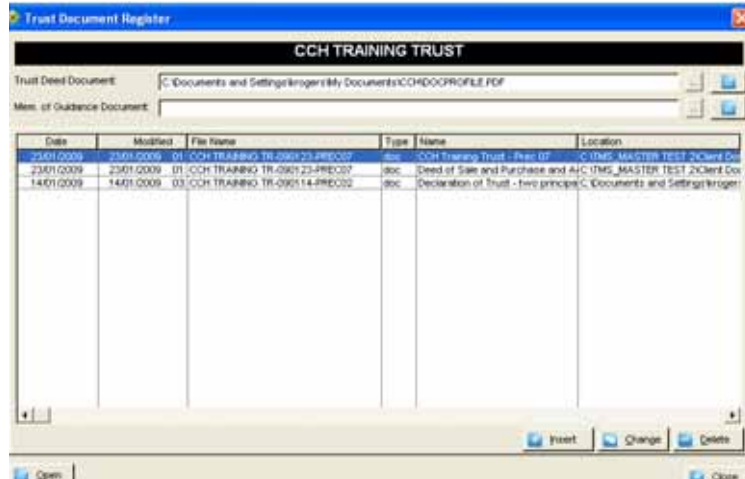


This is a hyperlink to the document, not an additional copy of the document

If you want your documents which have been created in the Trust Service to be automatically added to the Document Register you must set this option in User or User Groups.

To remove a document from the Document Register

Select the document you wish to remove. It does not matter if this document was created in the Trust Service or not.



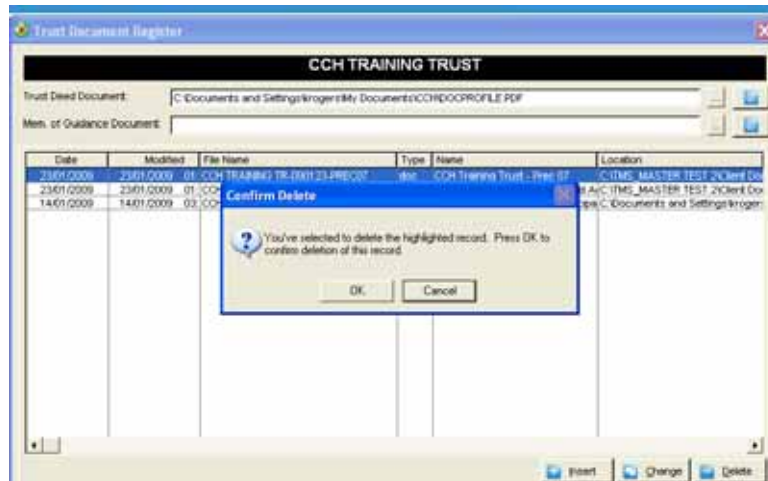
You have a choice to delete the actual document along with the hyperlink.



Select Yes to delete document & hyperlink

Select No to delete hyperlink only

You will see a confirmation message before deletion is final



Select OK & the hyperlink, and document if selected, are deleted

If the Modified column is empty the actual document may have been moved or renamed since its creation. If so, you do not get the option to 'Delete the Actual Document' as the Document cannot be found by the Trust Service.

Using a separate Document Management System

If you have a separate document management system in place you may need to create your document as per Session 2.1 then Save As into the appropriate location/system.

You can use both the Document Register and a separate document management system together or you may chose to bypass document register altogether.

If your document management system requires you to enter details as the document is created in Word this can cause conflicts with the Trust Service. If you have this issue please discuss your specific requirements and/or issues with the CCH Trainer.