

SESSION 3.5
LEVEL 1

Creating Standard Documents & Minutes and Using the Document Register

In this session we learned how to:-

- Create documents from the CCH Templates using the Precedent Wizard
- Create documents from the CCH Templates using the Letters Wizard
- Understand & Use the Document Register
- Create a Page in the Minute Book
- Add minutes from the CCH Templates to the Minute Book
- Create a Minute Document use the Print Button and the Minute Wizard

Action Points

Question	✓	Session Required	Date
Do I have all the Standard CCH Templates installed?		Contact Support	
Does Word start automatically from the Precedent Wizard on completion of Step 4 or Step 6 for the Letter Wizard		Contact Support	
Do you need more information on the User Settings which will allow you to add the 'Confirm Document Setting' screen)		Session 5	
Do you need to change your User Setting to 'Always Add' documents to the Document Register		Session 5	
Do I want to add any of my own company precedents or documents to the Trust Service Document Library		Session 8	
Do I want to customize any of the Trust Service Standard Document Templates to reflect my corporate image? E.g change font, layout or add a logo?		Session 8	
Do I have a separate Document Management System that is causing me difficulties with Trust Service Documents?		Discuss with CCH Trainer	
Do I need to add any Minute Templates to the Minute Library?		Session 9	
Do I want to make any changes to the Minute Document Template? E.g change fonts, layout or add a logo?		Session 9	
Do I need to add a Resolutions Template to the Document Library?		Session 9	
Do I need to create any 'Combined Minutes'?		Session 9	
Has this session highlighted the need for Customized Trust Service Training?		Discuss with CCH	

For further help:

Select Help to access the Trust Service Help Files



Visit 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 Training@cch.co.nz if you have 'how to' questions. Emails are answered 1day per week only, usually on Thursday or Friday