



CIVICA

Private Practice Training → Case Setup - Standard

➤ Who will the course benefit?

At least one Fee Earner from each applicable department (see pre-requisites).

➤ Pre-requisites

Attendees should have basic keyboard skills. Delegates will also need to attend the Word Precedents course, plus the Form Definition course if Laserforms are to be incorporated. A detailed flow chart of the required procedures should be prepared prior to the training course.

➤ Course reference

8LEG021

➤ Duration

One day.

➤ Further information

For additional information on this course or any other training issue please e-mail training@civica.co.uk

➤ Course objectives

This course is for users who wish to set up their own Case Processing application, or modify an existing one.

1. Introduction

- a. Course overview
- b. Use of menus
- c. Screen information
- d. Help screens
- e. Use of keys
- f. Searches

2. Setting up a case type

- a. Case modules
- b. Creating a case type
- c. Adding case type questions
- d. User defined answer lists
- e. Status or agenda driven?
- f. Case colours

3. Setting up postings and charges

- a. Autoposting batch definition
- b. Charging code
- c. Charge table
- d. Posting table

4. Setting up case calculated fields

5. Case module options

6. Case client options

7. Event definition

- a. Creating an event
- b. Overdue days
- c. Adding a document
- d. Adding a form
- e. Adding a time posting
- f. Adding next events
- g. Adding case information
- h. Adding postings and charges

8. Agenda definition

- a. Creating an agenda
- b. Adding an event
- c. Event response
- d. Previous events
- e. Diary forward
- f. Add agenda

9. Memo events

- a. Creating a memo event
- b. Obligatory events
- c. Adding a document
- d. Adding a time posting

10. Note types

- a. Creating a note type
- b. Imperative notes

11. Event groups

- a. Creating an event group
- b. Adding and deleting members

12. Reporting

- a. Maintenance reports
- b. Management reporting requirements

13. Testing

- a. Setting up a test matter
- b. Carrying out a test run