



CIVICA

Private Practice Training → Case V4 Word Precedents

➤ Who will the course benefit?

Experienced MS Word users. At least one Fee Earner from each applicable department.

➤ Pre-requisites

Attendees should be experienced MS Word users. Documents should be prepared ready for adding or amending if possible along with all paper types used.

➤ Course reference

8LEG009

➤ 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 designed to assist the legal secretary/system supervisor through setting up and amending Word precedents used in Case Processing.

1. Introduction

- a. Course overview
- b. Principals of document merge
- c. Directory structure

2. Galaxy merge fields

- a. Printing a field list
- b. Merge field aliasing
- c. Standard merge field
- d. Information fields
- e. Keyboard merge fields
- f. Multiple-instance merge fields
- g. Debt recovery merge fields

3. Word merge fields

- a. Inserting a Word merge field
- b. Updating a merge field
- c. Special merge fields
- d. If-then-else conditional fields
- e. Keyboard shortcuts

4. Amending standard documents

- a. Altering the layout
- b. Text amendments

5. Adding new documents

- a. Naming conventions
- b. Document titles
- c. Skeleton letters
- d. Adding a document to an event
- e. Creating a memo event with a document

6. Case type information

- a. Adding new case type questions
- b. User defined answer lists

7. Printer handling

- a. Paper types
- b. Printer paper tray setup
- c. Document types
- d. Select printer

8. Testing

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