



CIVICA

Private Practice Training → Reference Data Setup

➤ Who will the course benefit?

This course will be of interest to Supervisors and administrators and a representative from IT on the Administration subjects.

➤ Pre-requisites

Attendees should have basic keyboard skills.

➤ Course reference

8LEG018

➤ 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 is a consultation day. The purpose being to assist the supervisory staff in setting up a table of Users and User Security, set up the Reference Data and set up Fee Earners.

Administration and Security

- Galaxy user manager
- User details
- Authorisation group
- Function authorisation
- Toolbar maintenance
- Using the Help Books
- Process Server
- Registry Settings
- System Control Settings

Reference Data

- Base Calendar
- Maintain calendar events
- Currency maintenance
- Country maintenance
- Department maintenance
- Working group maintenance
- Work types maintenance
- VAT code maintenance
- Accounting group maintenance
- Create accounting periods

Fee earner

- Maintain charge band
- Fee earner grade
- Maintain fee earner
- Maintain fee earner calendar
- Maintain fee earner budgets