



# CIVICA

## Private Practice Training → Secretary Training

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### ➤ Who will the course benefit?

This course is designed for Secretaries and Administrative staff who are responsible for the input of new matters, inputting time sheets and ledger enquiries. You may wish to involve the Practice Manager.

### ➤ Pre-requisites

The Laserform software must be installed on the system.

### ➤ Course reference

8LEG021

### ➤ Duration

One day (2 repeat sessions a.m. & p.m.)

### ➤ Further information

For additional information on this course or any other training issue please e-mail [training@civica.co.uk](mailto:training@civica.co.uk)

### ➤ Course objectives

This course is split into 2 'repeat' sessions. The purpose of the course is to assist the support staff in setting up new matters, time recording and ledger enquiries.

#### General

- Menu Structure
- Using Help
- General Searches
- Conflict Searches

#### Clients & Matters

- Input of New Clients & Matters
- Amending & Deleting records
- Matter Options Window
- Maintain Matter Associates
- View Matters

#### Time Recording

- Maintain Calendar Events
- Manual Timesheet Entry
- Suspended Time

#### Reports

- Composite Billing Guide
- Express Billing Guide
- Time Express
- Timesheet Exceptions
- Accounts All Ledgers
- Accounts Express

#### Crystal Reports

- Ledgers Enquiry
- Fee Earner Daily Timesheet
- Fee Earner Weekly Timesheet Summary
- Time Posted by Matter