



CIVICA

Private Practice Training → Periodic Routines

➤ Who will the course benefit?

Personnel who will be responsible for completing the month end procedures for the system.

➤ Pre-requisites

Attendees should have basic keyboard skills.

➤ Course reference

8LEG016

➤ 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

The session is to assist the Authority with periodic routines and to go through reporting and changing periods.

General

- Maintain document types
- Maintain locations
- Maintain documents
- Document retrieval
- Archiving
- Manual archiving
- Automated archiving
- Compressing archived records

Reports

- Archived Matter Listing
- Matters to be Archived List
- Trial Balance
- Balance Report
- Management Reports in Crystal

Month/Year End

- Change period
- Export Galaxy reports to spreadsheets