Juris Suite User Guide

Version 3.2

LexisNexis

TOC

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Revision Date

LexisNexis

1801 Varsity Drive
Centennial Campus
Raleigh, NC 27606

North America: 800.387.9785
Outside North America: 919.467.1221
Fax: 919.467.7181

https://www.lexisnexis.com/business-of-law/products/practice-management/juris

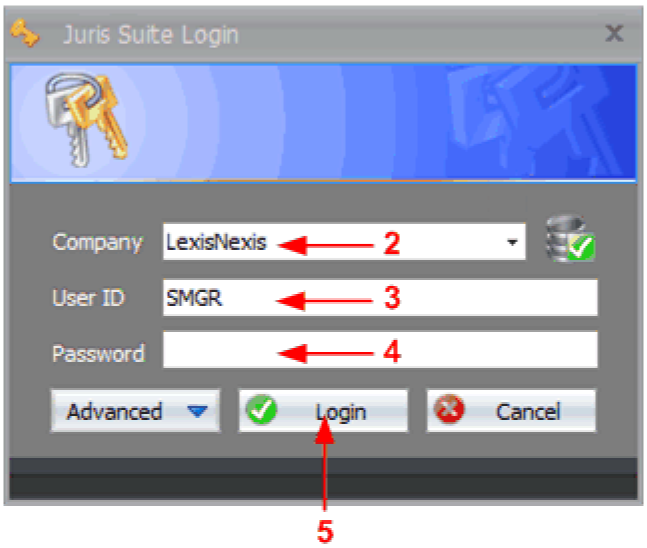
Obtain the software

Because the majority of customer environments are unique and complex, we strongly recommend Juris® Suite customers schedule assisted installations and upgrades with LexisNexis Customer Support. To schedule an assisted installation or upgrade, call us toll free at 877.377.3740.

Login and password assistance

Log in

1. Launch theJuris ® Suite application.
2. Verify or change the company name in the **Company** box.

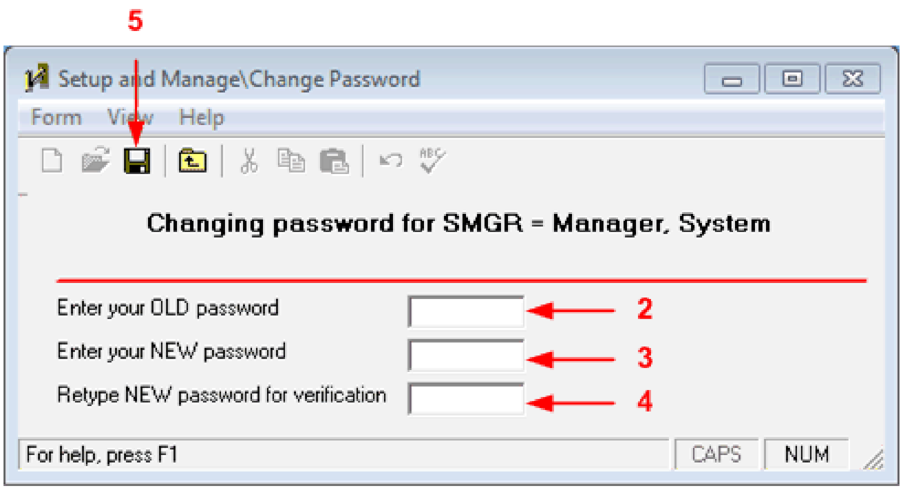


3. Verify or change your User ID in the **User ID** box.
4. Enter your password in the **Password** box. Remember that passwords are case-sensitive.
5. Click the **Login** button.
6. If the Juris Suite application does not allow you to log in, contact your system manager.

Change your password

You must have access to the password function to change your password. If you do not, contact your system manager or administrator.

1. Launch the Juris application, login, and then select **Setup and Manage**, then **Change Password**.
2. Enter your old password in the **Enter your OLD password** field.

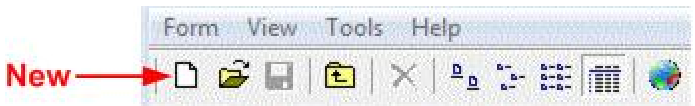


3. Enter your new password in the **Enter your NEW password** field.
4. Enter your new password again for verification in the **Retype NEW password for verification** field.
5. **Save** your changes.

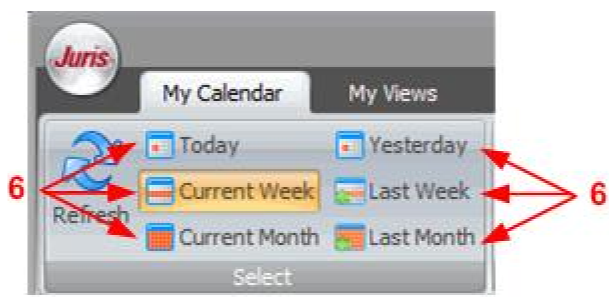
Time management

Change the calendar date range

1. Launch the **Juris Suite** application.
2. Select the **My Calendar** function in the My Summary Snap in. A 'Snap in' provides additional functionality, but does not have to be used, if not needed.
3. Use the black arrows to navigate to the appropriate month and year.



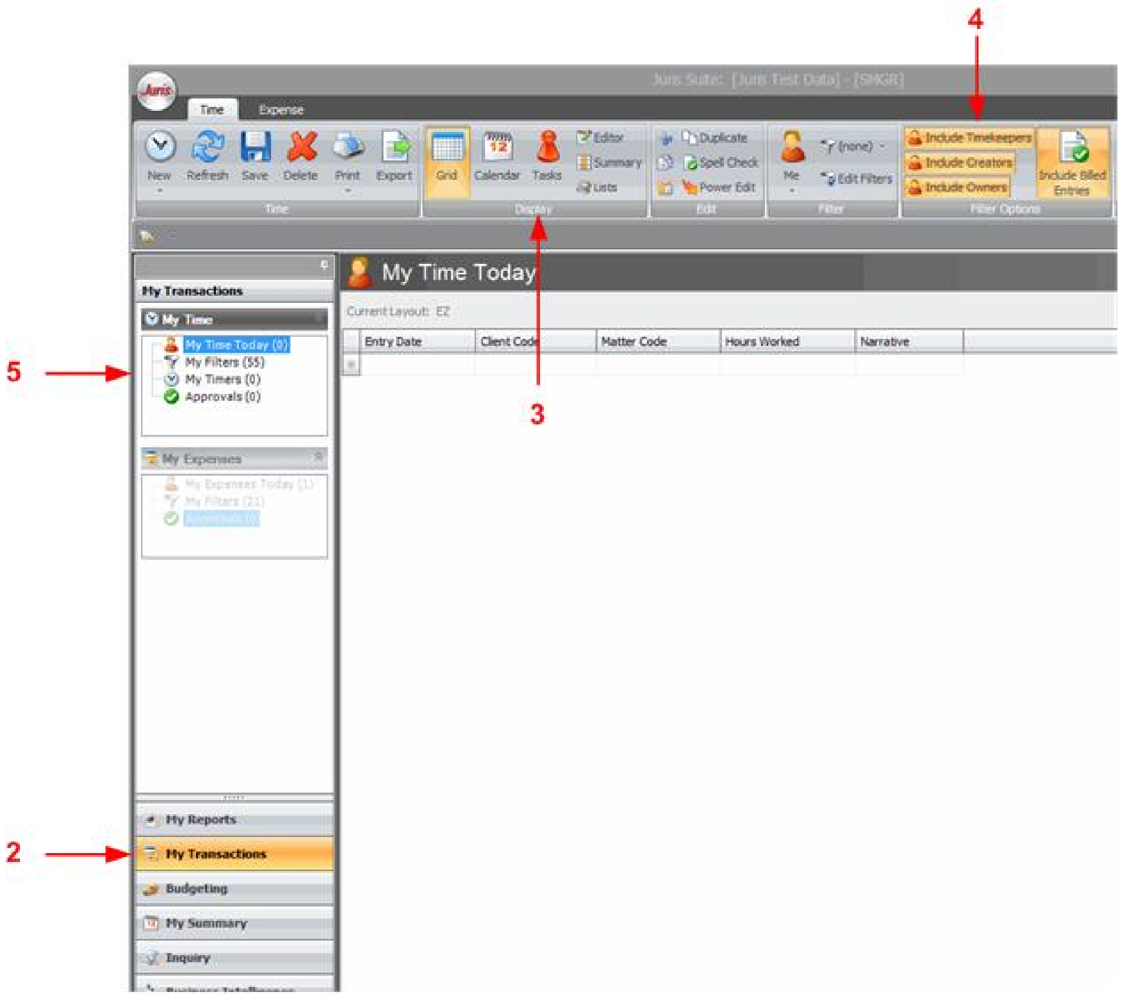
4. Click the appropriate day. The results are displayed.
5. Display the information in the **My Calendar** tab.
6. Click on the appropriate button to define the interval that will be displayed on your calendar. Possible options are **Today, Current Week, Current Month, Yesterday, Last Week, or Last Month.**



Customize your time entry view

In the examples in this guide, it is necessary to select a view of the data to provide instructions, but be aware that as you become familiar with the interface, you will select the views that suit your needs.Launch the Juris Suite application.

1. Select **My Transactions**. If you do not see both the **My Time** and **My Expenses** Snap-Ins when you select My Transactions, your administrator has not enabled those for you. This will depend on the policy at your firm.



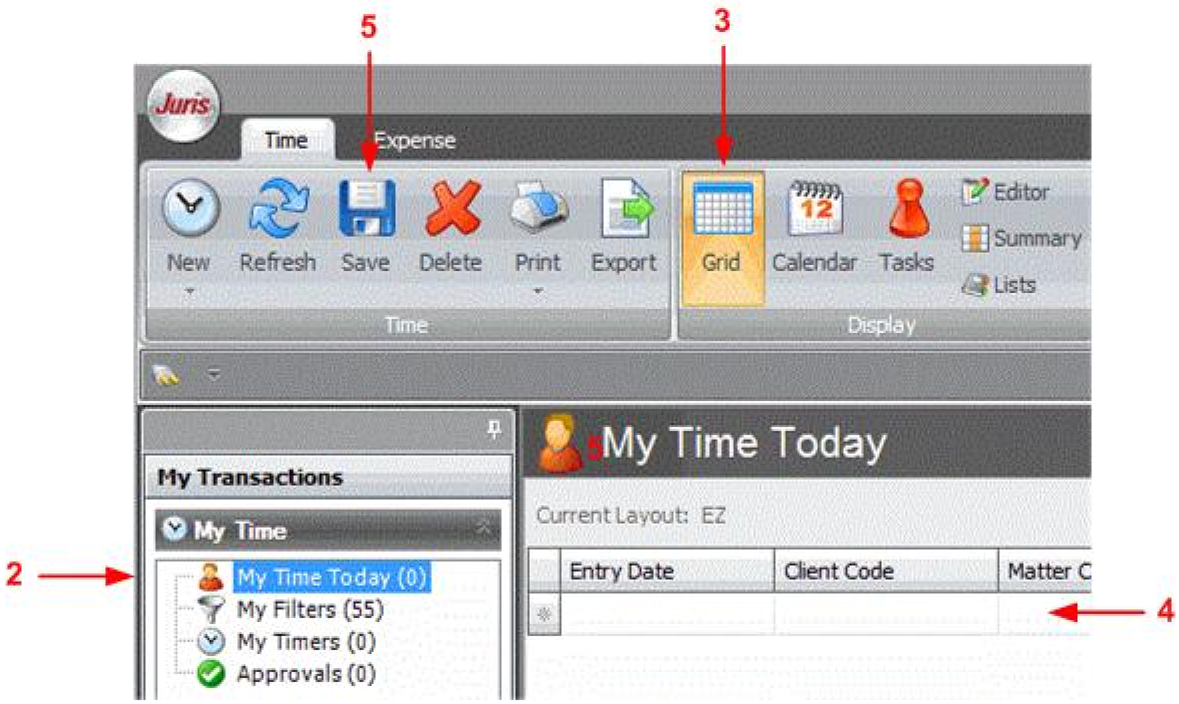
2. There are many ways to view your time information. In the Display area of the ribbon, select Grid, Calendar, or Tasks.

3. Once you have selected a Display type that works well for the task you need to accomplish, select the type of data to be included.

4. In addition to specifying how the data will be displayed, you can select the type of data to be displayed. In the My Time area on the left side of the window, select **My Time Today**, **My Filters**, or **Approvals**.

Create a new time entry

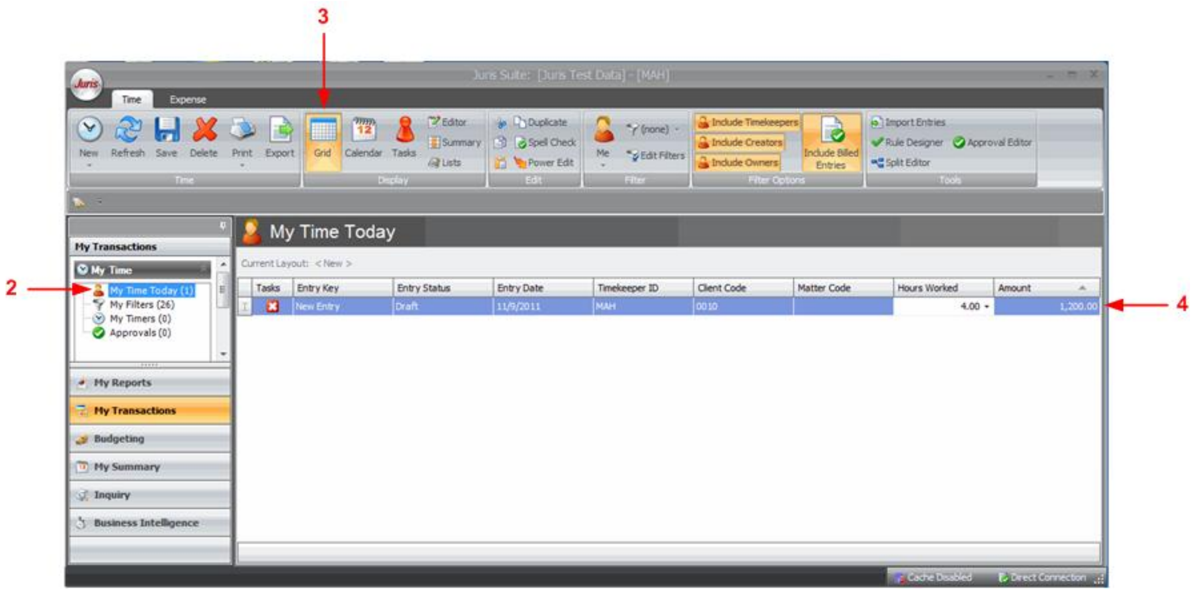
1. Launch the **Juris Suite** application.
2. Select **My Transactions** > **My Time** > **My Time Today**.



3. Click the **Grid** button.
4. Click inside the **Quick Entry Layout** and begin entering data. Some fields will be populated automatically as you enter information. Enter a Client Code, and if appropriate, a Matter Code. Enter the amount of time to be charged.
5. **Save** your changes.

Submit a time entry for billing

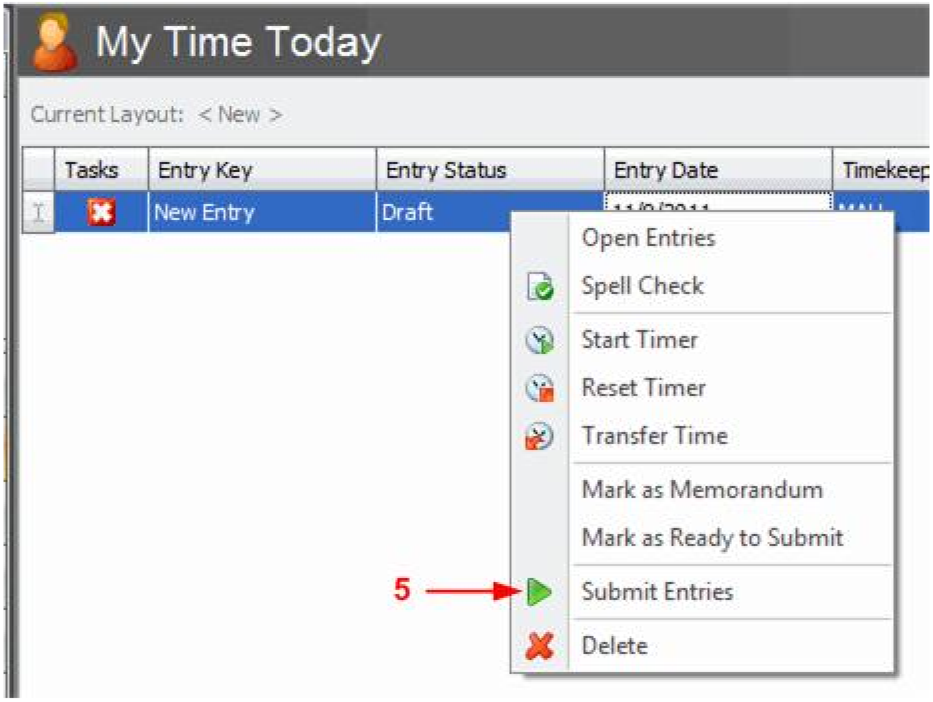
1. Launch the **Juris Suite** application.
2. Select **My Transactions** > **My Time** > **My Time Today**.



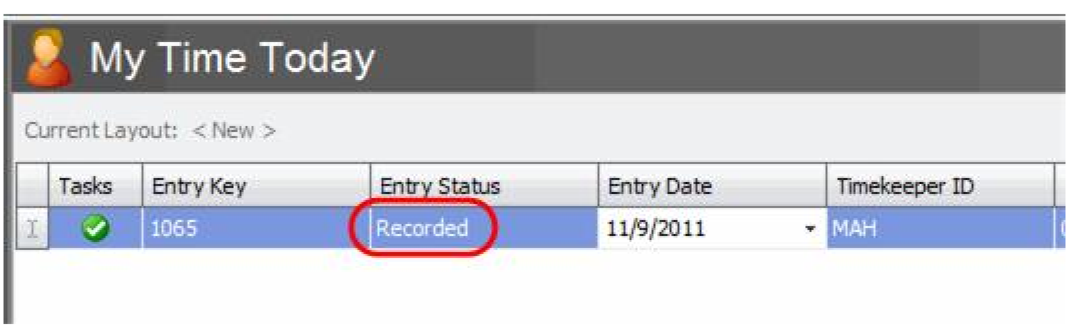
3. Select the **Grid** method to display your time data. Remember that the fields that are displayed in the grid are customizable.
4. Each row in the **Quick Entry Layout** window indicates a time entry for this timekeeper for today.

   Select one of the following methods for submission, depending on your current needs:

5. To submit a single time entry to billing, right-click the time entry record in **My Time Today** and select **Submit Entries** from the pop up menu.

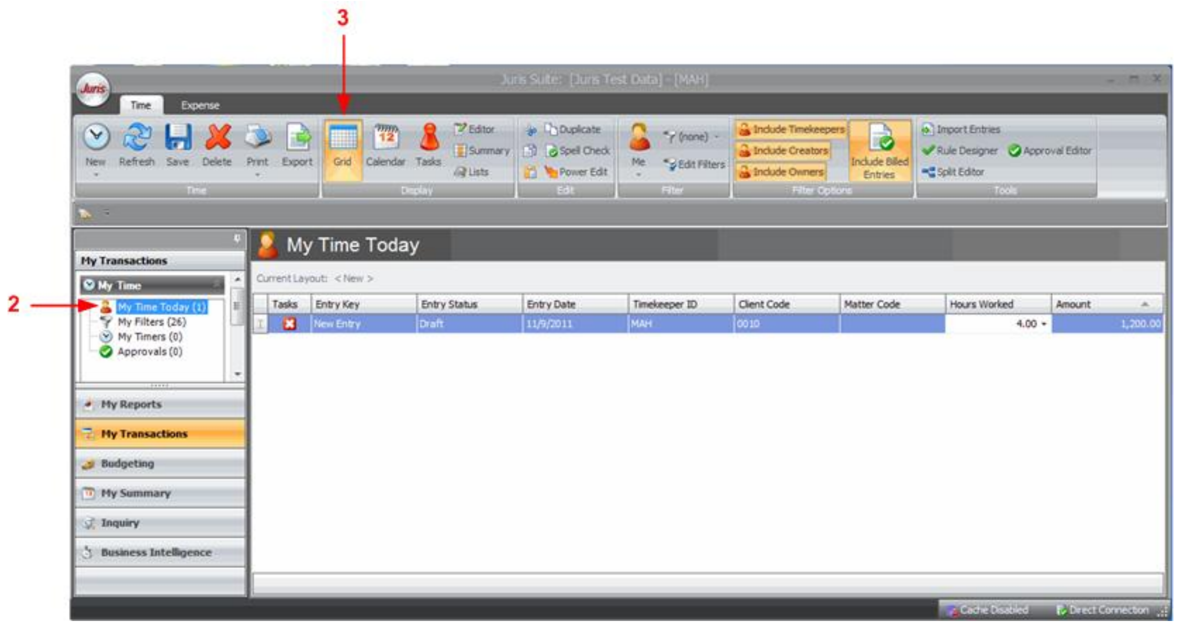


6. To submit multiple entries that are not together in the list, hold down the CTRL key while selecting the entries to be submitted. Right-click any selected entry, and select Submit Entries from the pop up menu.
7. To submit a range of entries, click the first entry, then hold down the Shift key while clicking the last entry in the range. Right-click any entry in the range and select Submit Entries from the pop up menu.
8. To select ALL rows, click the gray square in the top left corner of the window. Right-click and select **Submit Entries** from the pop up menu.
9. Note that the Entry Status changes to **Recorded**. The status of Recorded indicates that the time entries are available to the Billing department to be posted and billed.

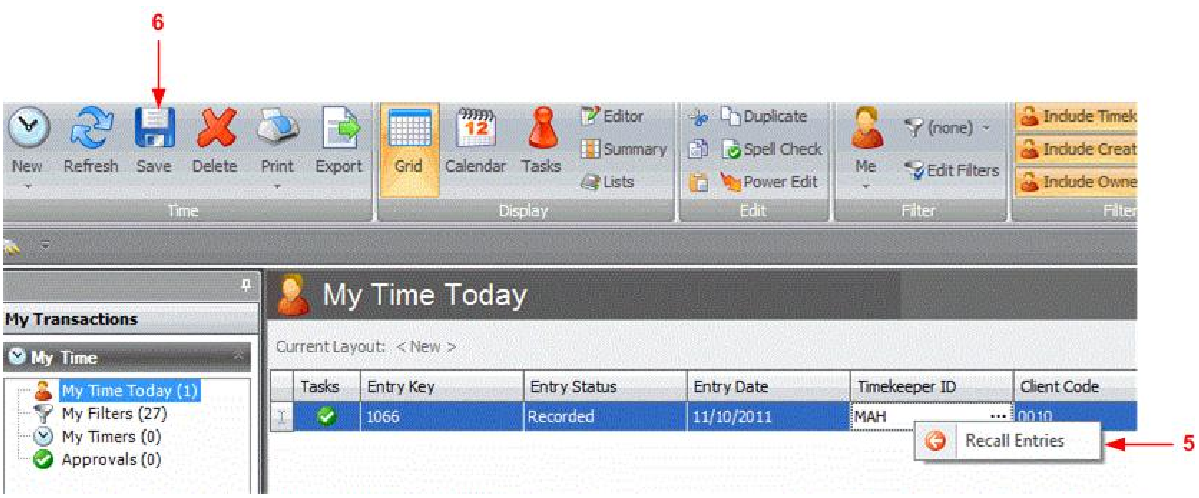


Correct a time entry

1. Launch the **Juris Suite** application.
2. Select **My Transactions** > **My Time** > **My Time Today**.



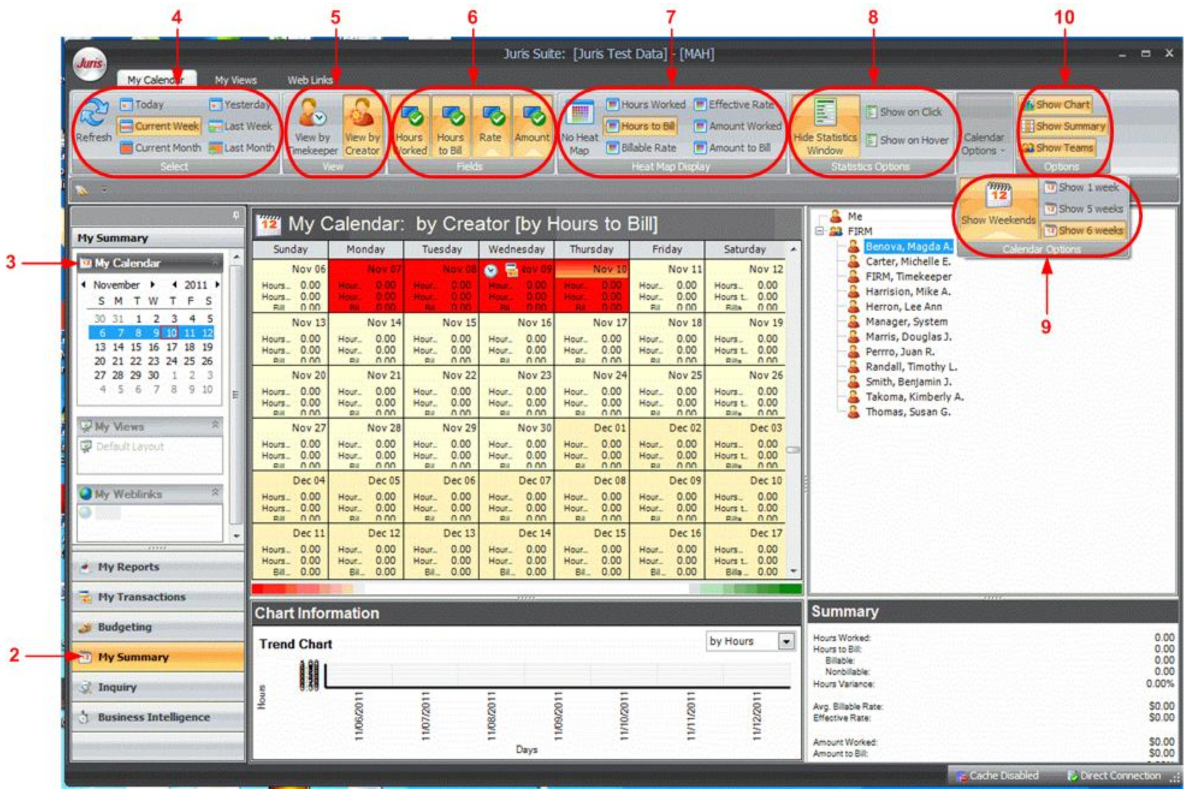
3. Select the **Grid** method to display your time data. The fields that are displayed in the grid are customizable. Each row in the **My Time Today** window indicates a time entry for this timekeeper for today. For more information about using the **Column Chooser** and the **Filter Editor**, see the detailed online help information.
4. If a change is needed to a time entry whose status has already been changed to **Recorded**, the item can be recalled. Note that if the item has already been posted by the Billing Department, a correction cannot be made.
5. To make a correction, right-click the item, then select **Recall Entries** from the popup window.



6. The item will be returned to Draft status, and the item can be edited. Make the necessary changes, and then **Save** your changes. The item will need to be re-submitted for billing.

Set up and view a calendar

1. Launch the **Juris Suite** application.
2. Select **My Summary**.

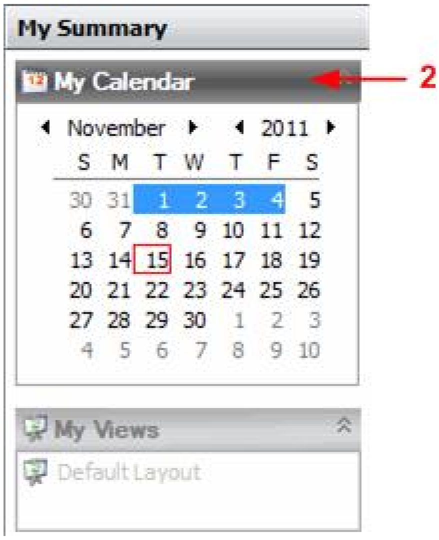


3. Verify that the **My Calendar** tab is selected.
4. Select the amount of time to be viewed in your calendar in the **Select** portion of the ribbon. Options vary from Today to Last Month.
5. Select whether your calendar will be displayed by Timekeeper or by Creator in the **View** portion of the ribbon.
6. Highlight the data that will be displayed on your calendar in the **Fields** portion of the ribbon.
7. Select the type of data that will determine if a day on the calendar is highlighted in Red. This is done in the **Heat Map Display** portion of the ribbon.
8. Select how you want statistics to be displayed in the **Statistics Options** portion of the ribbon.

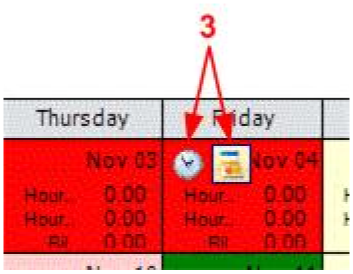
9. Select the amount of time that will be displayed in the **Calendar Options** drop down menu on the ribbon.
10. Select whether to Show Chart, Show Summary, or Show Teams in the **Options** portion of the ribbon.

View time and expenses from My Calendar

1. Launch the **Juris Suite** application.
2. Select the **My Calendar** function in the **My Summary** Snap-in.



3. Moving to the center of the window, hover over the upper left area of a calendar day to reveal the **Time** (the clock icon) and **Expense** icons.

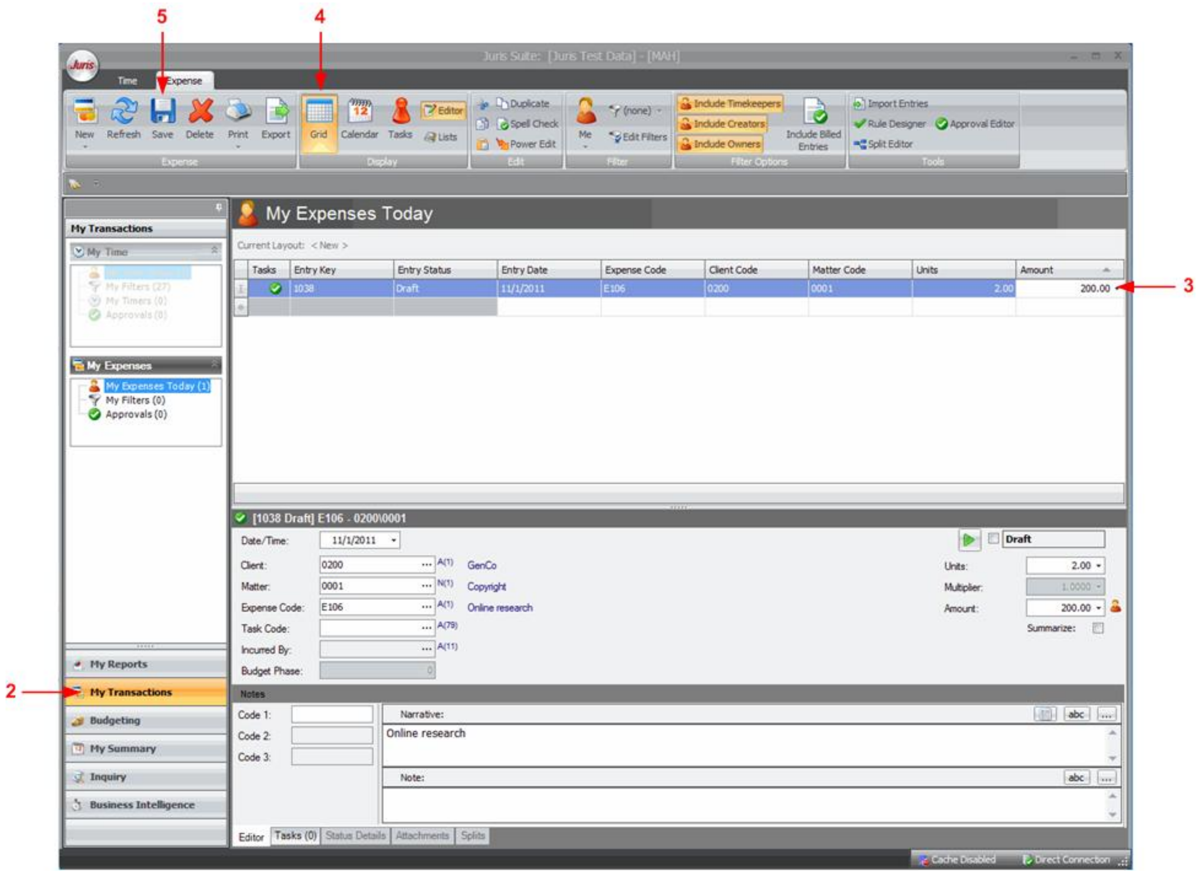


4. Click the appropriate icon to reveal the associated form.
5. Edit as necessary and then **Save** your changes.

Expense management

Create a new expense entry

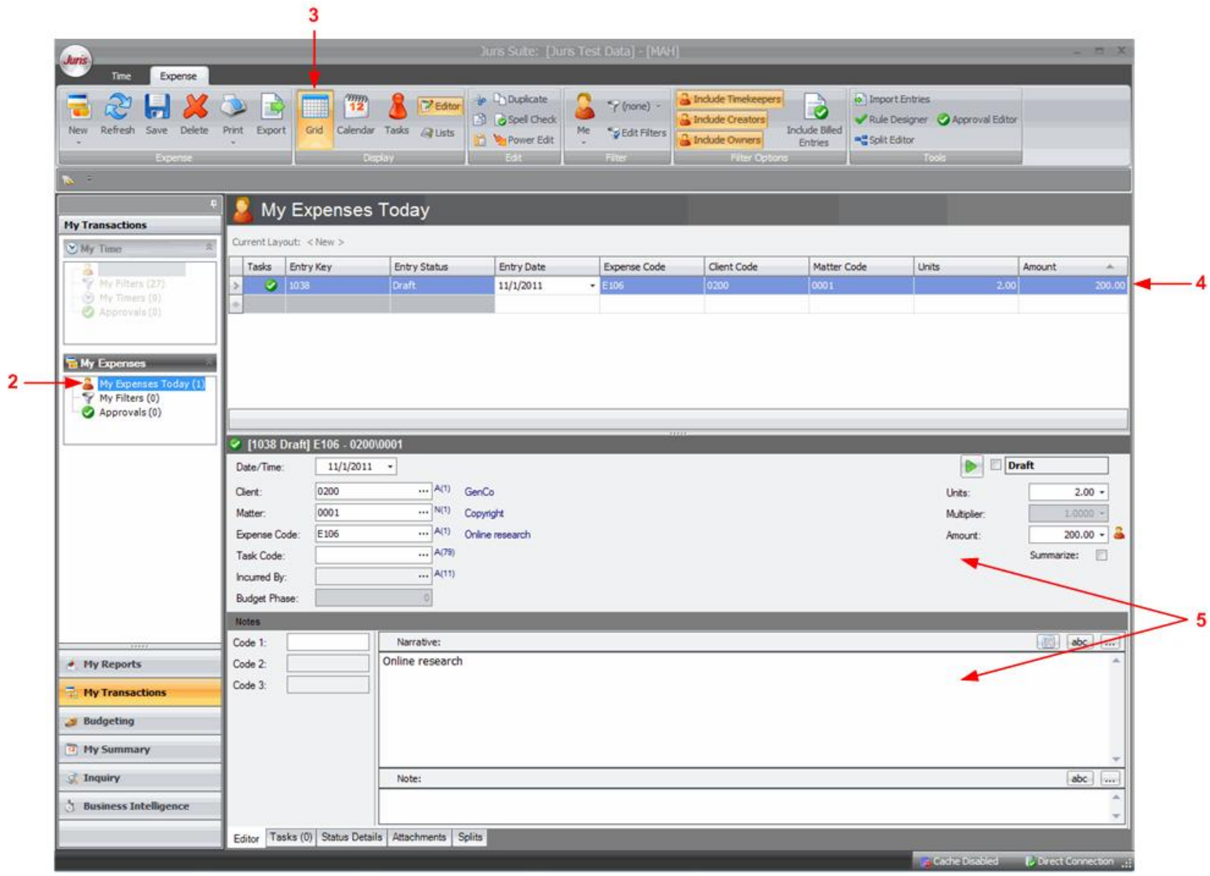
1. Launch the **Juris Suite** application.
2. Select **My Transactions** > **My Expenses** > **My Expenses Today**.



3. Select the **Grid** method to display your expense data. Remember that the fields that are displayed in the grid are customizable. Each row in the My Expenses Today window indicates an expense entry. For more information about using the Column Chooser and the Filter Editor, see the detailed online help information.
4. Click in the first available record row to create a new entry. Complete all fields that are applicable for the new expense entry.
5. Click the **Save** icon to save the record.

Submit an existing expense entry

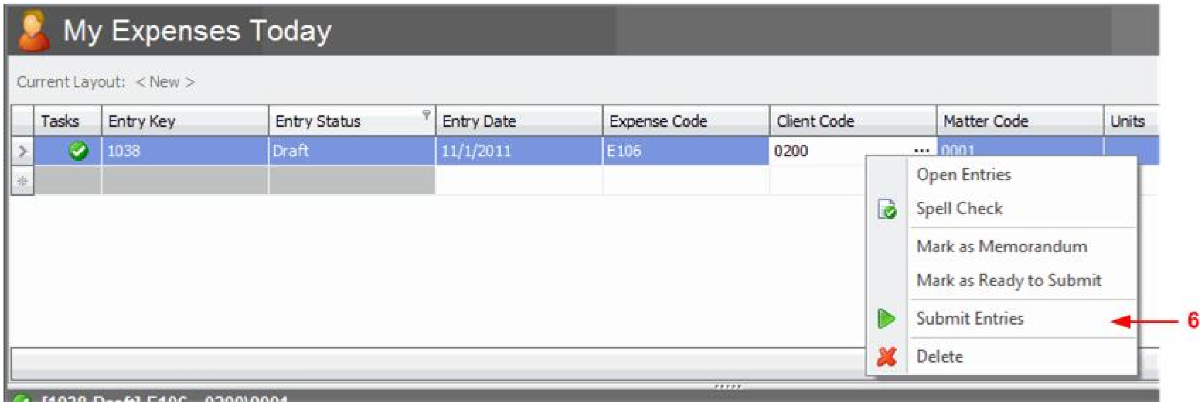
1. Launch the **Juris Suite** application.
2. Select **My Transactions** > **My Expenses** > **My Expenses Today**.



3. Select the **Grid** method to display your expense data. Remember that the fields that are displayed in the grid are customizable.
4. Each row in the **My Expense Today** window indicates an expense entry for this timekeeper for today.
5. Note that the expense entry can also be edited in two additional portions of the window; the detail section and the Notes section.

   Choose the appropriate selection method below, depending on your needs:

6. To submit a single expense entry to billing, right-click the expense entry record in **My Expenses Today** and select **Submit Entries** from the pop up menu.



7. To submit multiple entries that are not together in the list, hold down the CTRL key while selecting the entries to be submitted. Right-click while selecting any row that was selected, and select **Submit Entries** from the pop up menu.

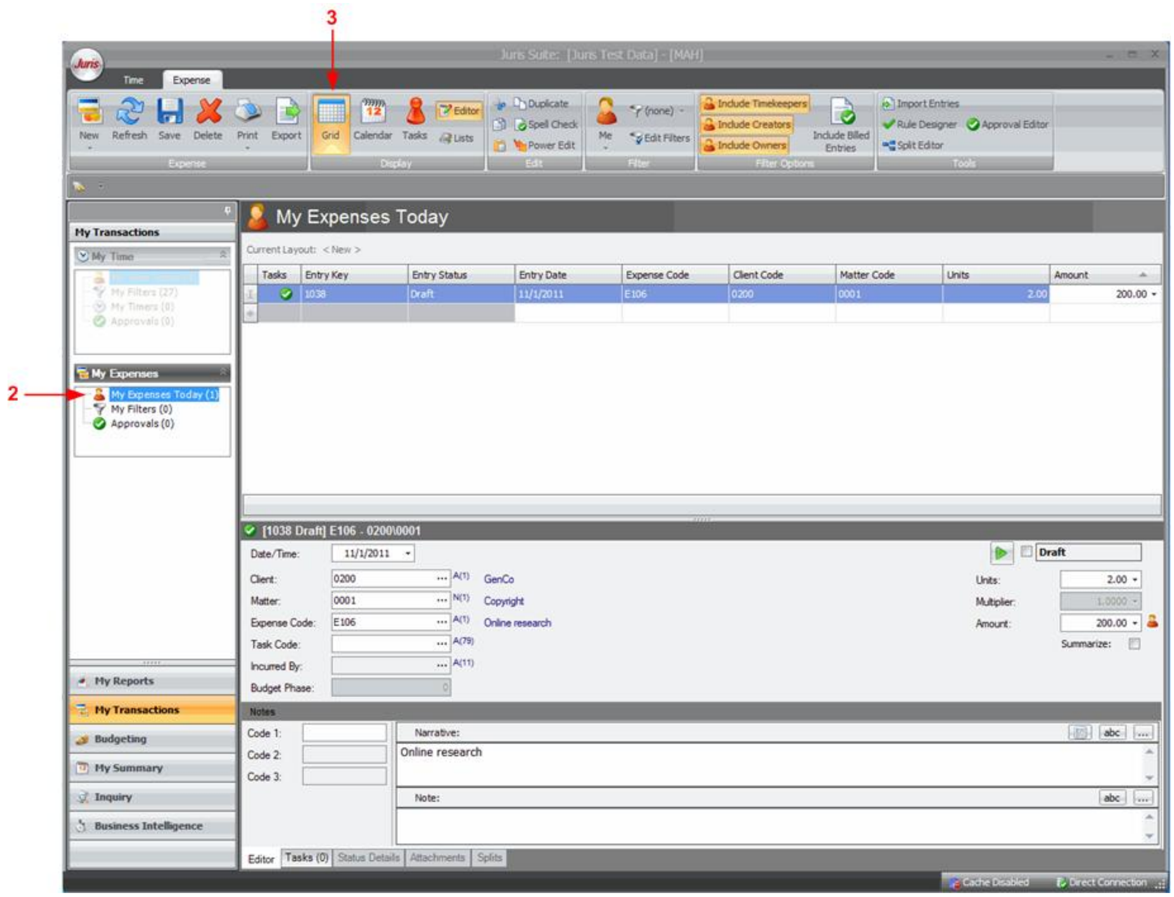
8. To submit a range of entries, click the first entry, then hold down the Shift key while clicking the last entry in the range. Right-click any entry in the range and select Submit Entries from the pop up menu.

9. To select ALL rows, click the gray square in the top left corner of the window. Right-click and select **Submit Entries** from the pop up menu.

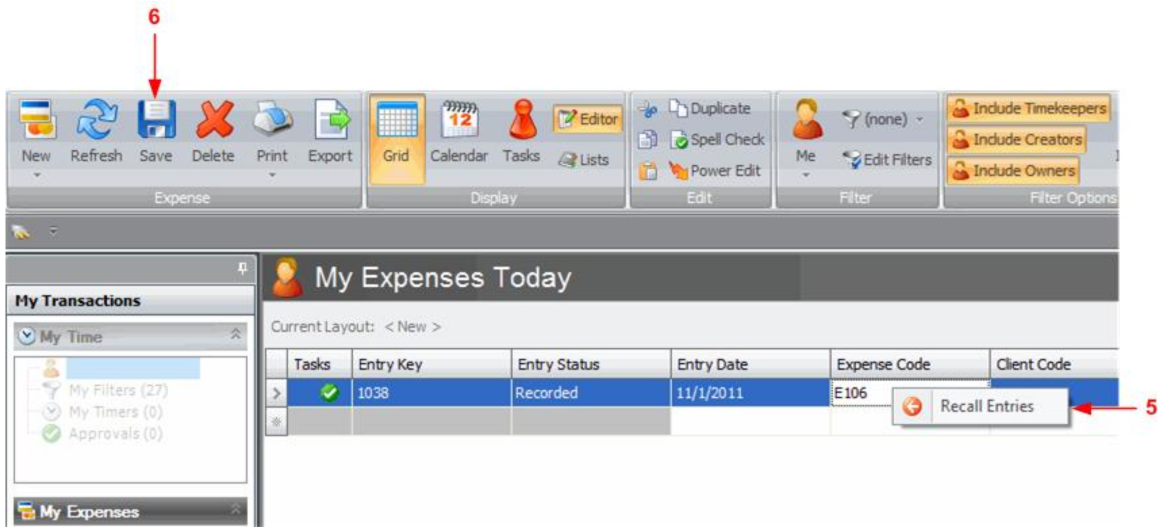
10. Note that the Entry Status changes to **Recorded**. The status of Recorded indicates that the time entries are available to the billing department to be posted and billed.

Correct an expense entry

1. Launch the **Juris Suite** application.
2. Select **My Transactions** > **My Expenses** > **My Expenses Today**.



3. Select the **Grid** method to display your expense data. Remember that the fields that are displayed in the grid are customizable. Each row in the **My Expenses Today** window indicates an expense entry.
4. If a change is needed to an expense entry whose status has already been changed to **Recorded**, the item can be recalled. If the item has already been posted by the Billing Department, a correction cannot be made.
5. To make a correction to an item that has been recorded, right-click the item, then select **Recall Entries** from the pop up window.

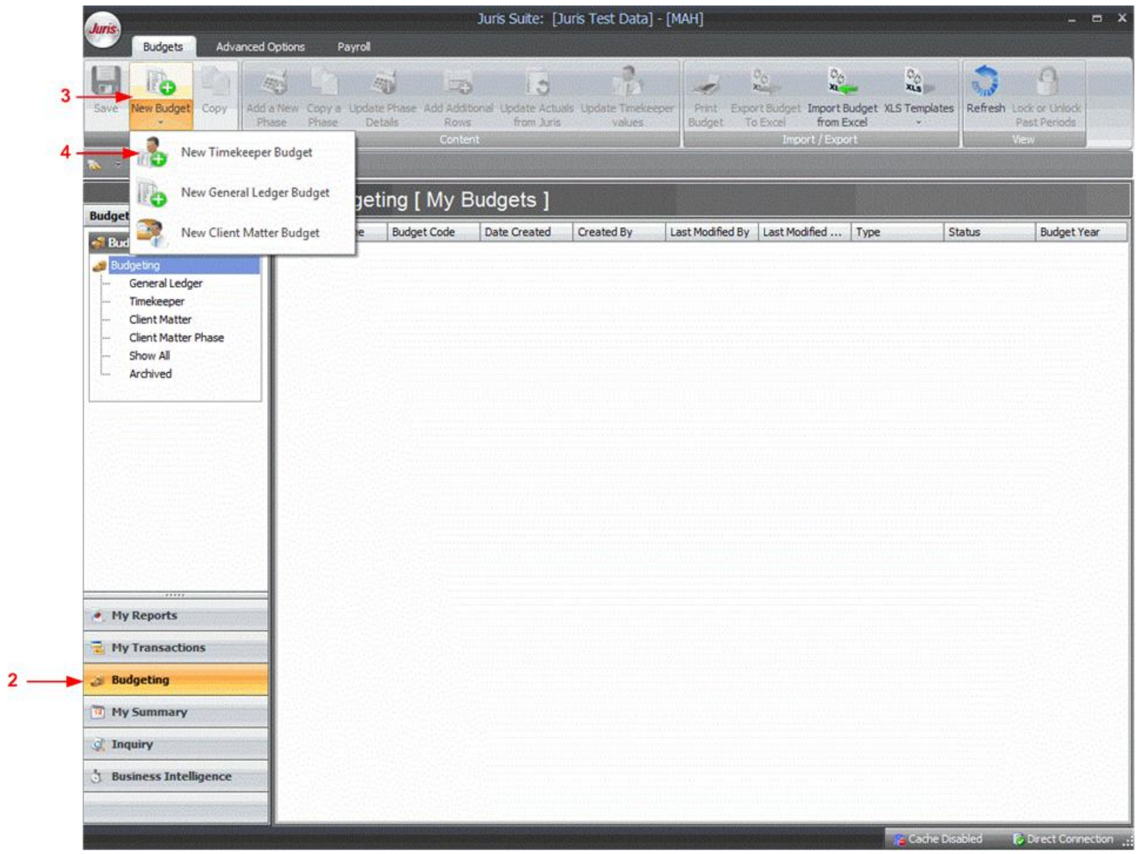


6. The item will be returned to Draft status, and the item can be edited. Complete all necessary changes, and then **Save** your changes. The item will need to be re-submitted for billing.

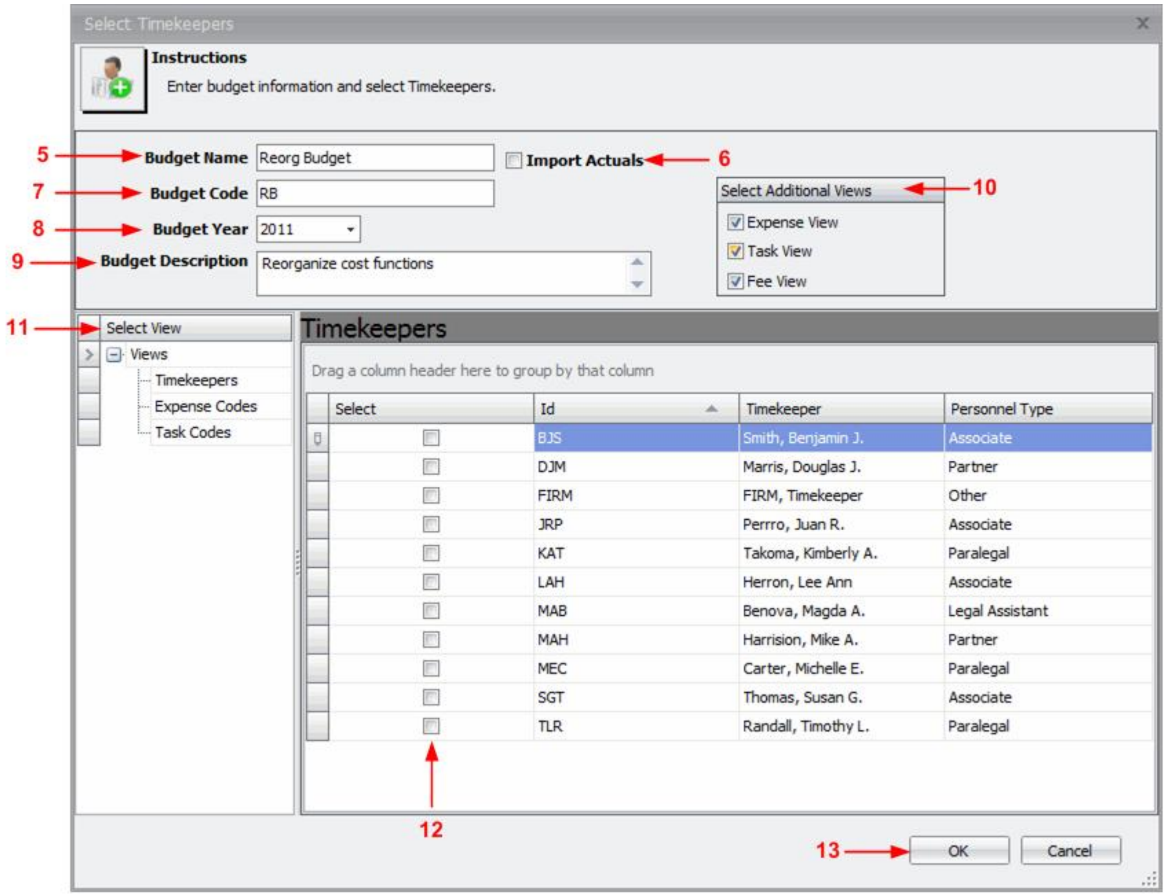
Budgeting

Set up a new timekeeper budget

1. Launch the **Juris Suite** application.
2. Select **Budgeting**. (This option is available via a Snap-in.)



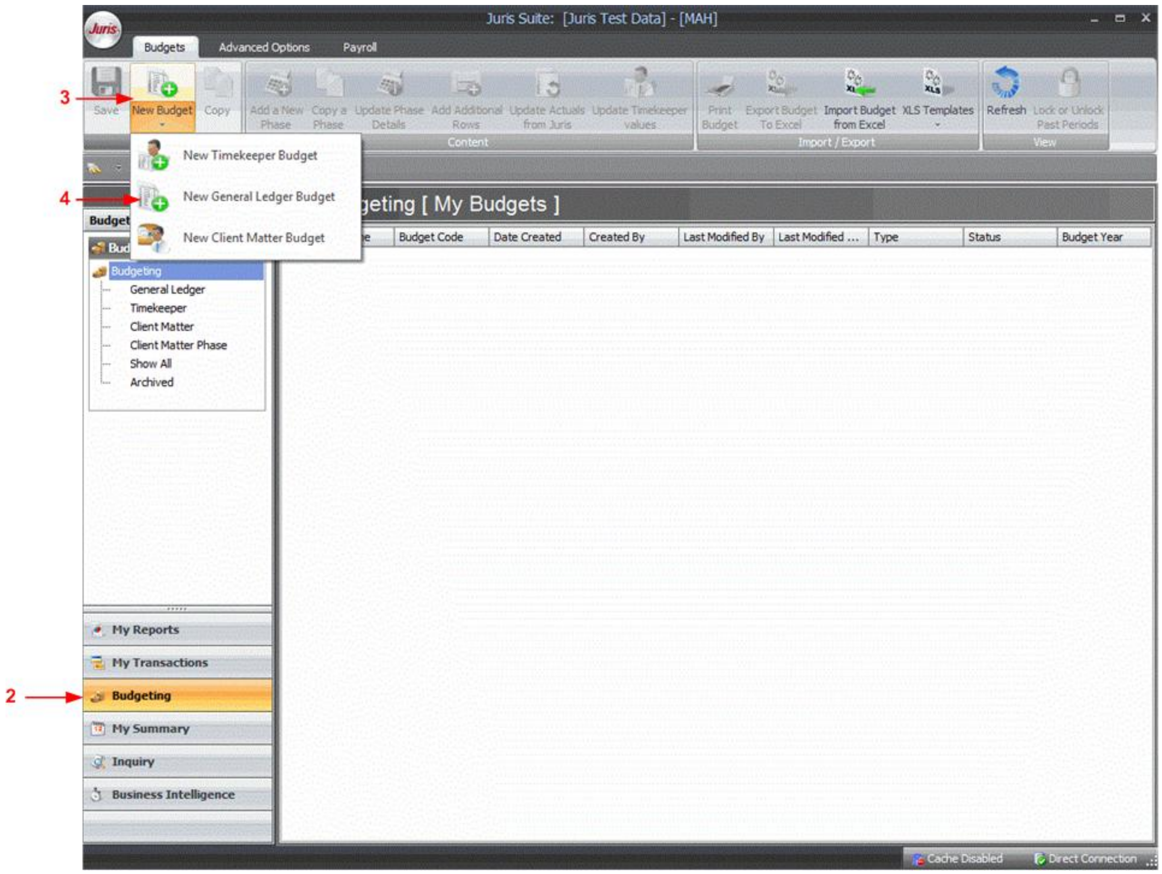
3. Click the **New Budget** icon from the task ribbon.
4. Note that a drop down menu displays. Select the type of budget to be created. Click the **New Timekeeper Budget**.
5. The **Select Timekeepers** window displays. Enter a name for the new budget in the **Budget Name** field.



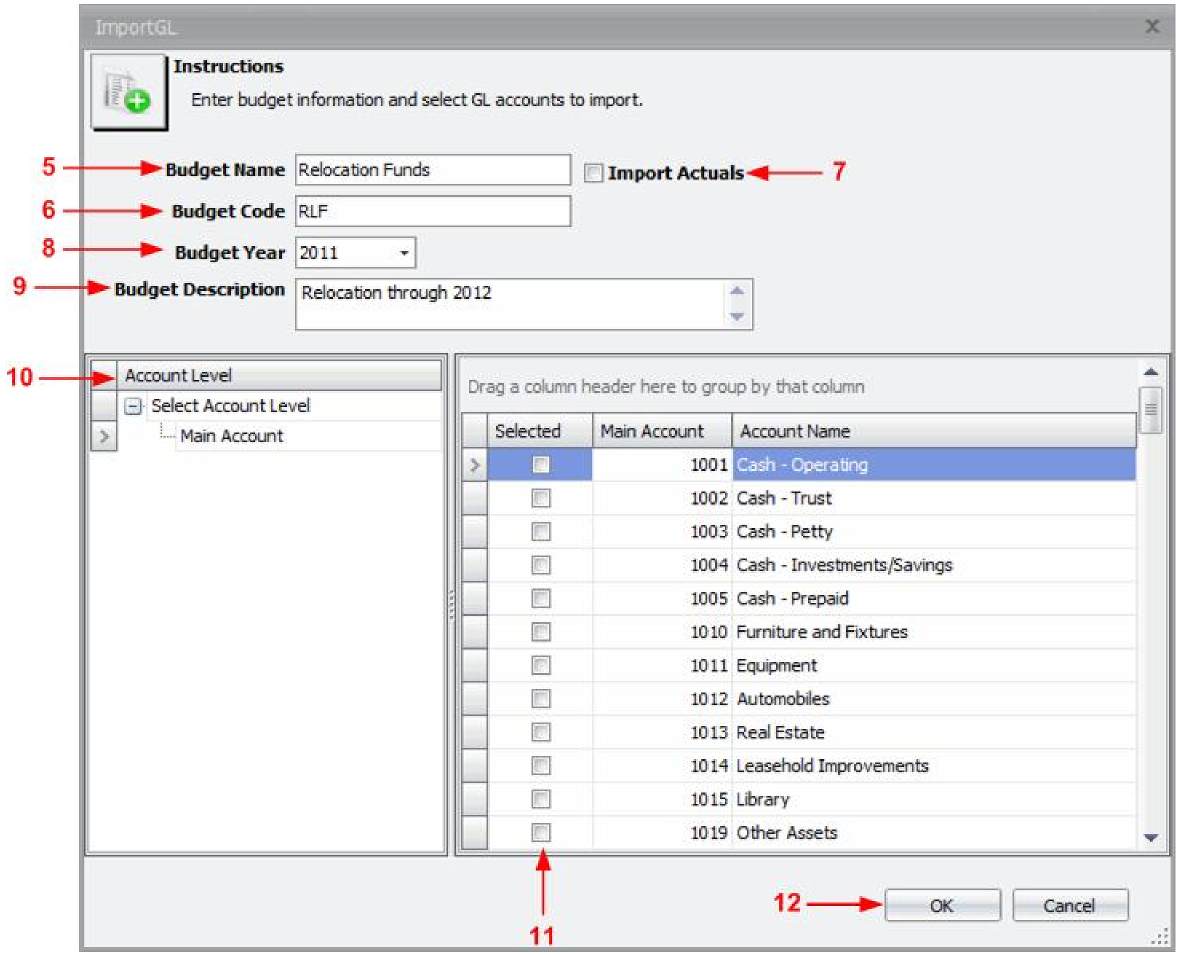
6. Click to check **Import Actuals** if you want to import actual costs.
7. Enter a budget code in the **Budget Code** field.
8. Select a **Budget Year** from the pull down menu in the Budget Year field.
9. Enter a short description of the budget in the **Budget Description** field.
10. Using the check boxes, click to check the views to be included; Expense View, Task View, or Fee View.
11. Highlight the view that you want to review under **Select View**.
12. Click to check the **Timekeepers** to be associated with the budget. Note that to change the format of the Timekeepers view; you can drag any column header to the gray column header portion of the Timekeepers pane.
13. Click **OK** to save the budget.

Set up a new general ledger budget

1. Launch the **Juris Suite** application.
2. Select **Budgeting**. (This option is available via a Snap-in.)



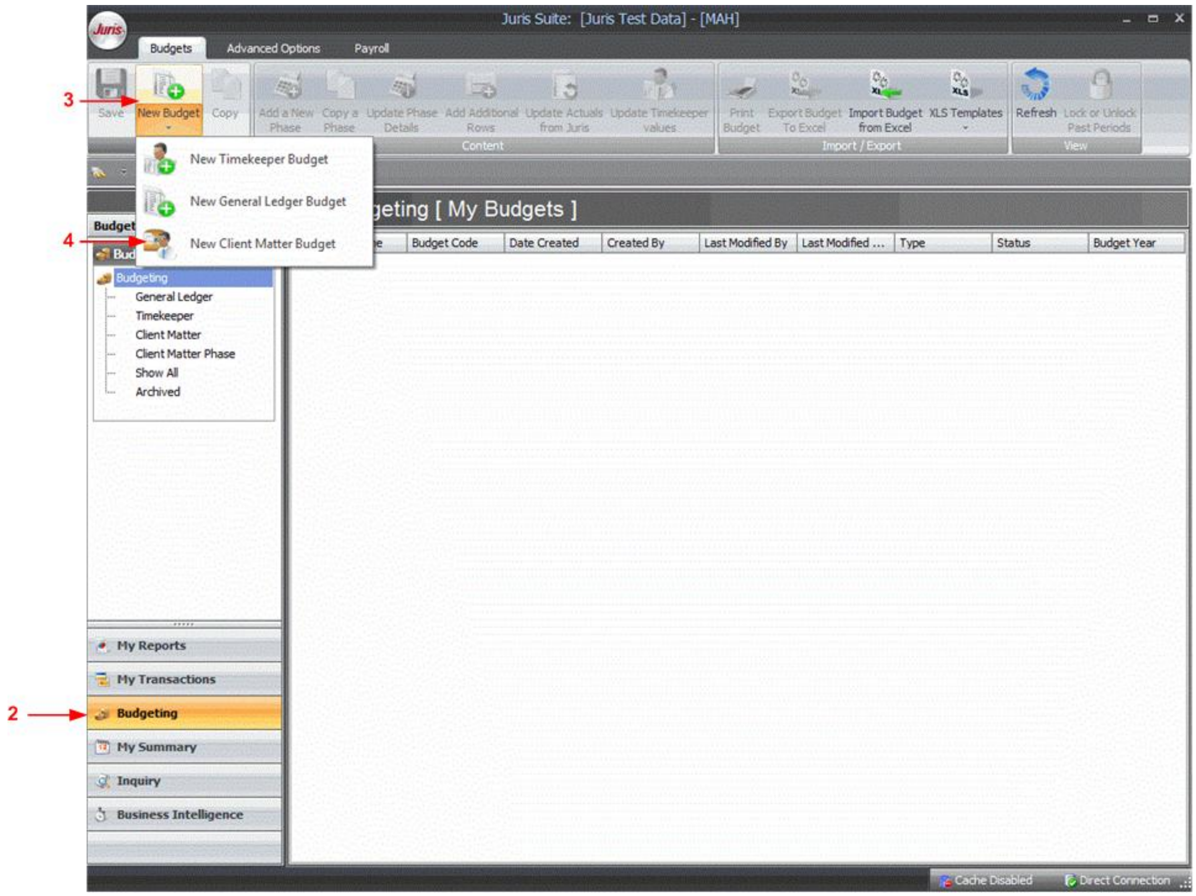
3. Click the **New Budget** icon from the task ribbon.
4. Note that a drop down menu displays. Click the **New General Ledger Budget**.
5. The **ImportGL** window displays. Enter a name for the new budget in the **Budget Name** field.



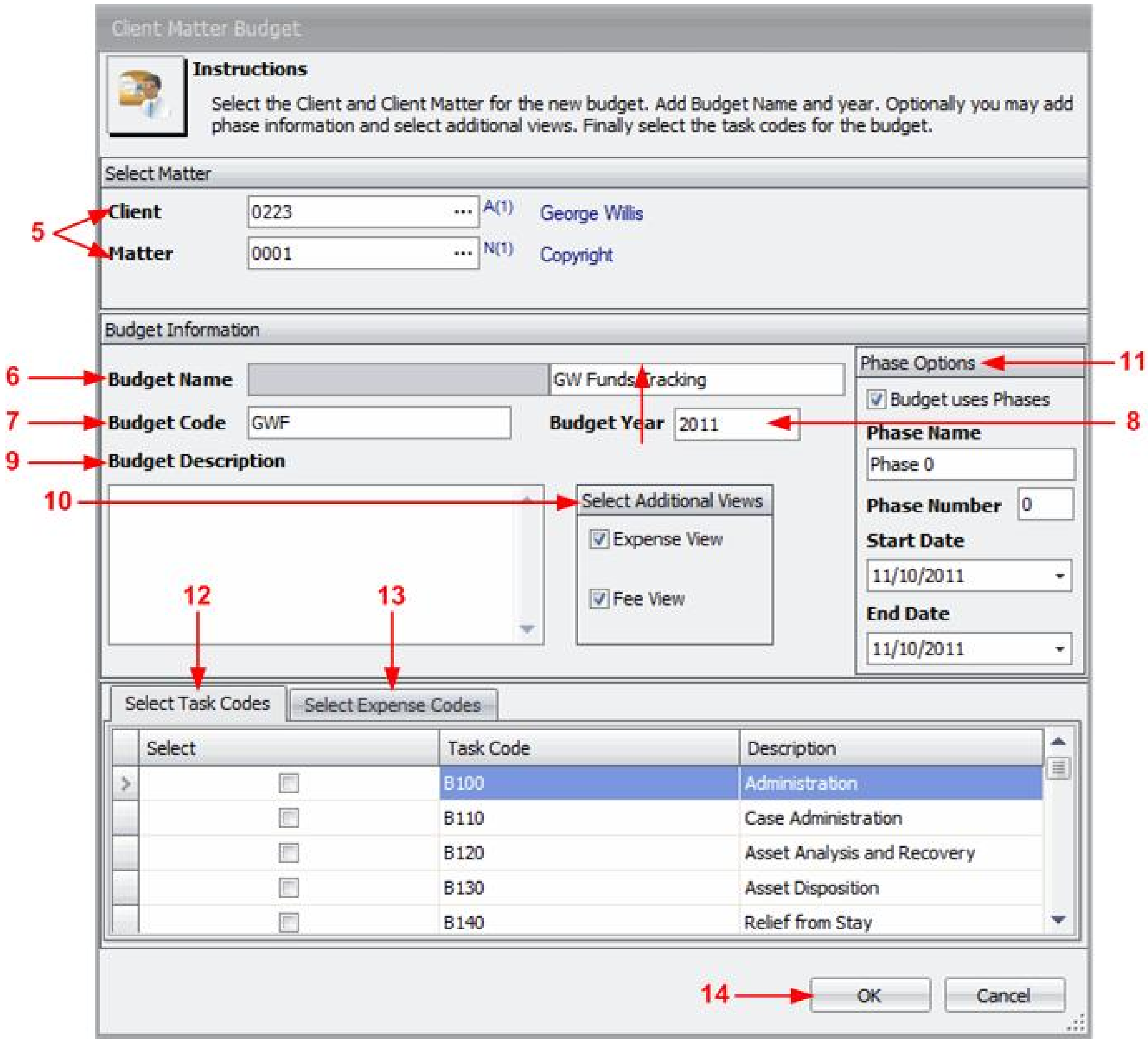
6. Click to check **Import Actuals** if you want the General Ledger to import actual costs during the creation of a new budget.
7. Enter a budget code in the **Budget Code** field.
8. Select a **Budget Year** from the pull down menu in the Budget Year field.
9. Enter a short description of the budget in the **Budget Description** field.
10. Select the **Account Level** to be viewed.
11. Click to check the accounts to be associated with the budget.
12. Click **OK** to save the budget.

Set up a new client matter budget

1. Launch the **Juris Suite** application.
2. Select **Budgeting** (available through the use of a Snap-in).



3. Click the **New Budget** icon from the task ribbon.
4. Note that a drop down menu displays. Click the **New Client Matter Budget**.
5. In the **Client Matter Budget** window that displays, select a **Client** and **Matter**. Remember to use the ellipses icons (... button) to display a list of items from which to select your entry.

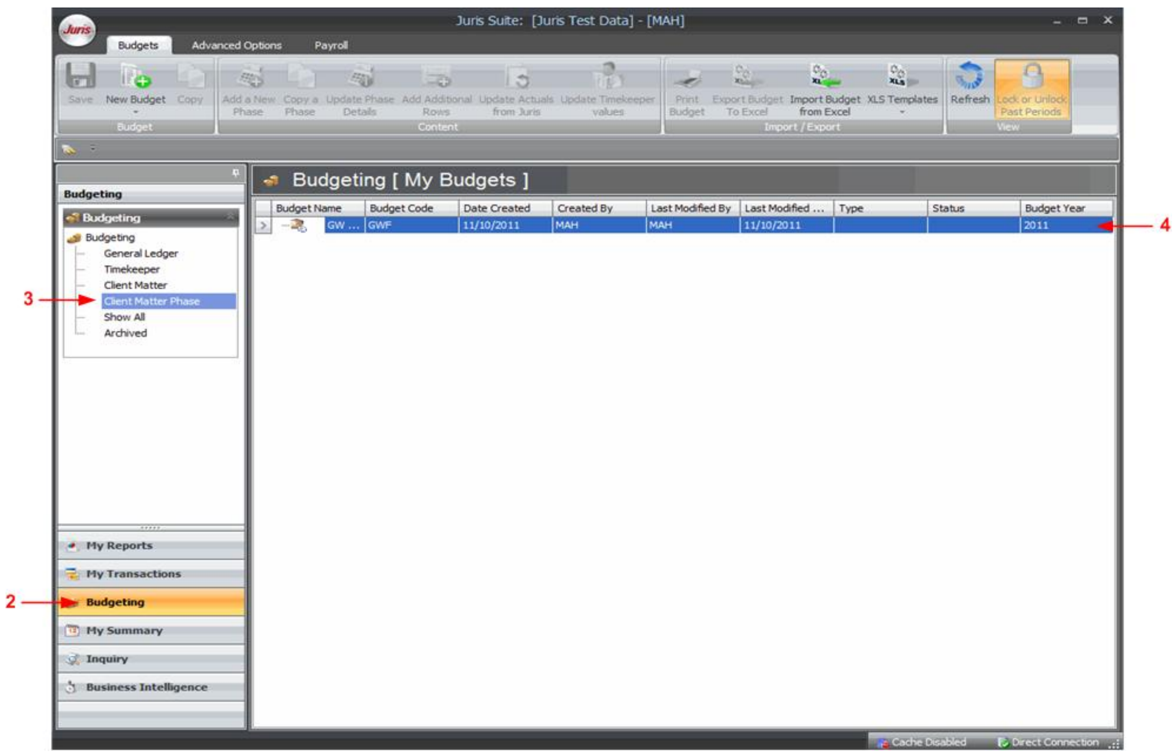


6. Enter a name for the new budget in the **Budget Name** field.
7. Enter a budget code in the **Budget Code** field.
8. Select a Budget Year from the pull down menu in the **Budget Year** field.
9. Enter a short description of the budget in the **Budget Description** field.
10. Click to check the views to be included in the **Select Additional Views** field; Expense View, or Fee View.
11. Click to check **Phase Options** if the budget uses phases. If the budget uses phases, indicate a Phase Name, Phase Number, Start Date, and End Date. Refer to the detailed online help for more information regarding using Phase Options.

12. Select the **Select Task Codes** tab if the budget will be task based. Click to check the task codes to be used.
13. Select the **Select Expense Codes** tab if the budget will be expense based. Click to check the expense codes to be used.
14. Click **OK** to save the budget.

View existing budgets

1. Launch the **Juris Suite** application.
2. Select **Budgeting** (available via a Snap-in).

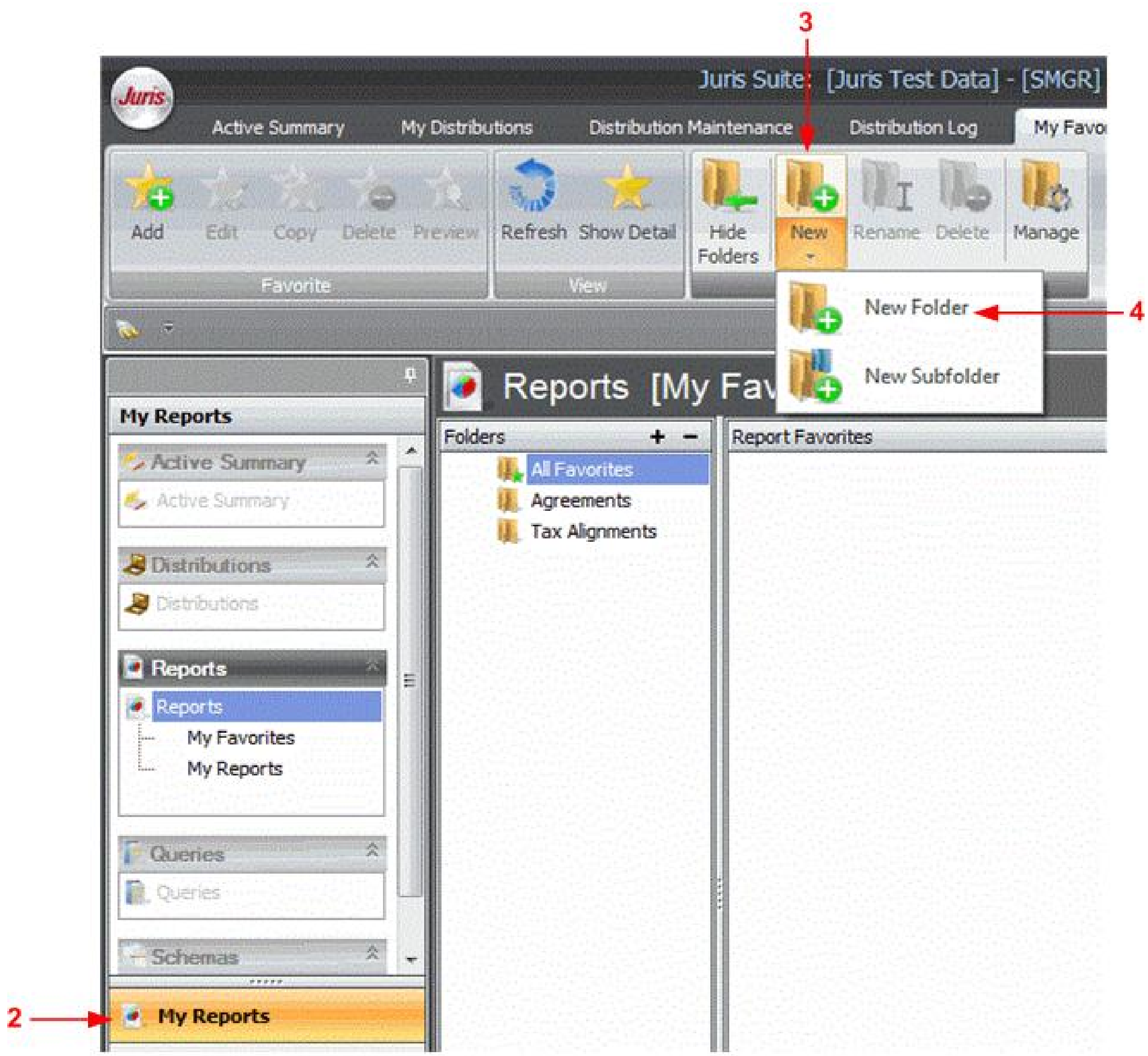


3. Highlight a budget type in the **Budgeting** menu.
4. Budgets are displayed in the **Budgeting [My Budgets]** window. Note that the type of budget displayed is controlled by the type of budgeting selected.

Reporting

Create a new reports folder

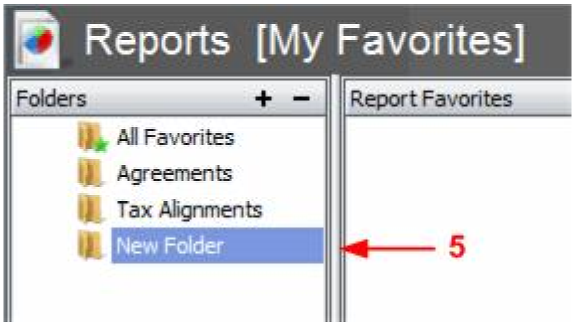
1. Launch the **Juris Suite** application.
2. Select **My Reports**(available via a Snap-in).



1. Launch Juris Suite.
2. Select **My Reports**.
3. Click the **New** icon in the toolbar.
4. Select **New Folder** from the drop down menu.
5. Overtype the name for the folder.

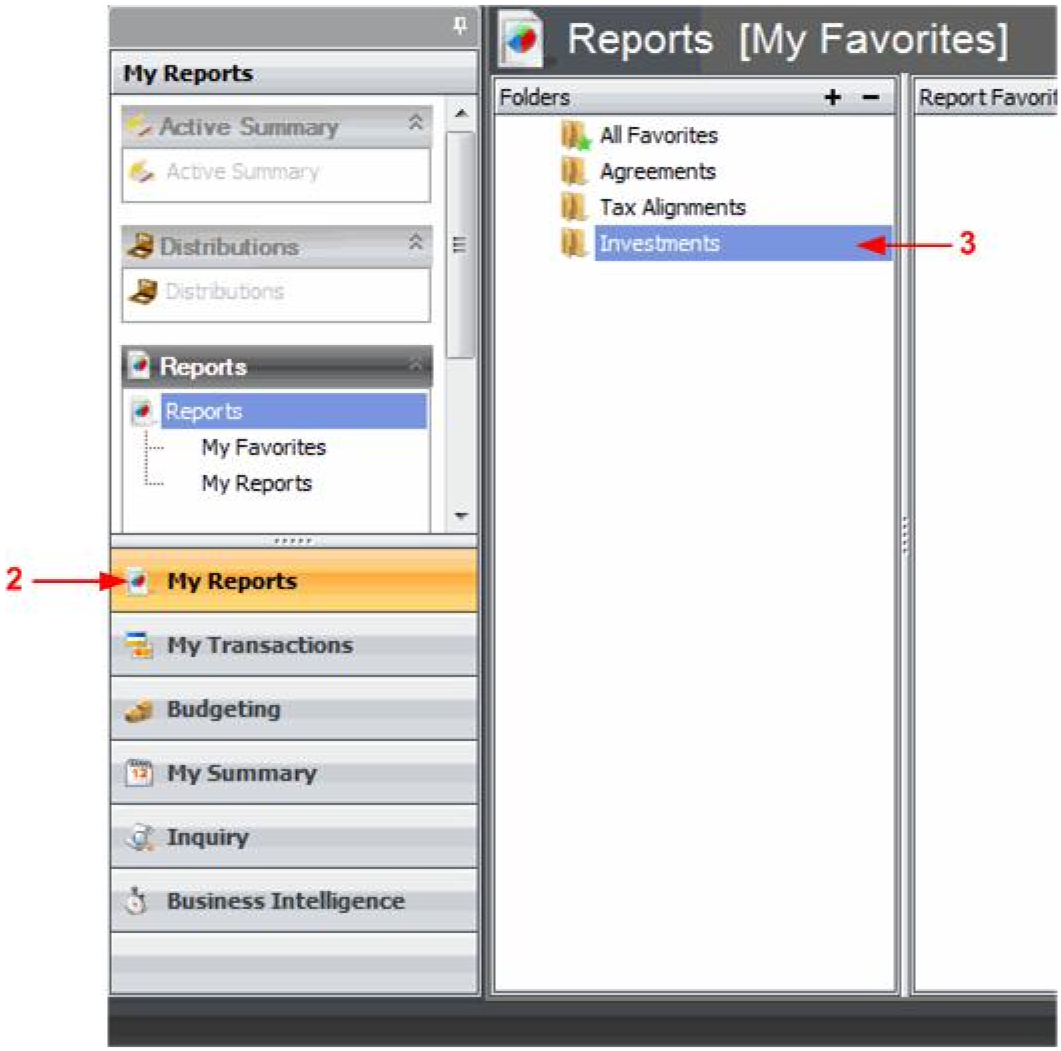
3. Click the **New** icon in the ribbon.

4. Select **New Folder** from the drop down menu.
5. Over-type the folder name, **New Folder**, with one that is more meaningful.

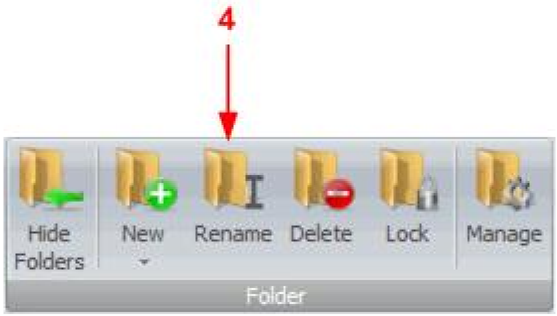


Rename a reports folder

1. Launch the **Juris Suite** application.
2. Select **My Reports** (available via Snap-in).



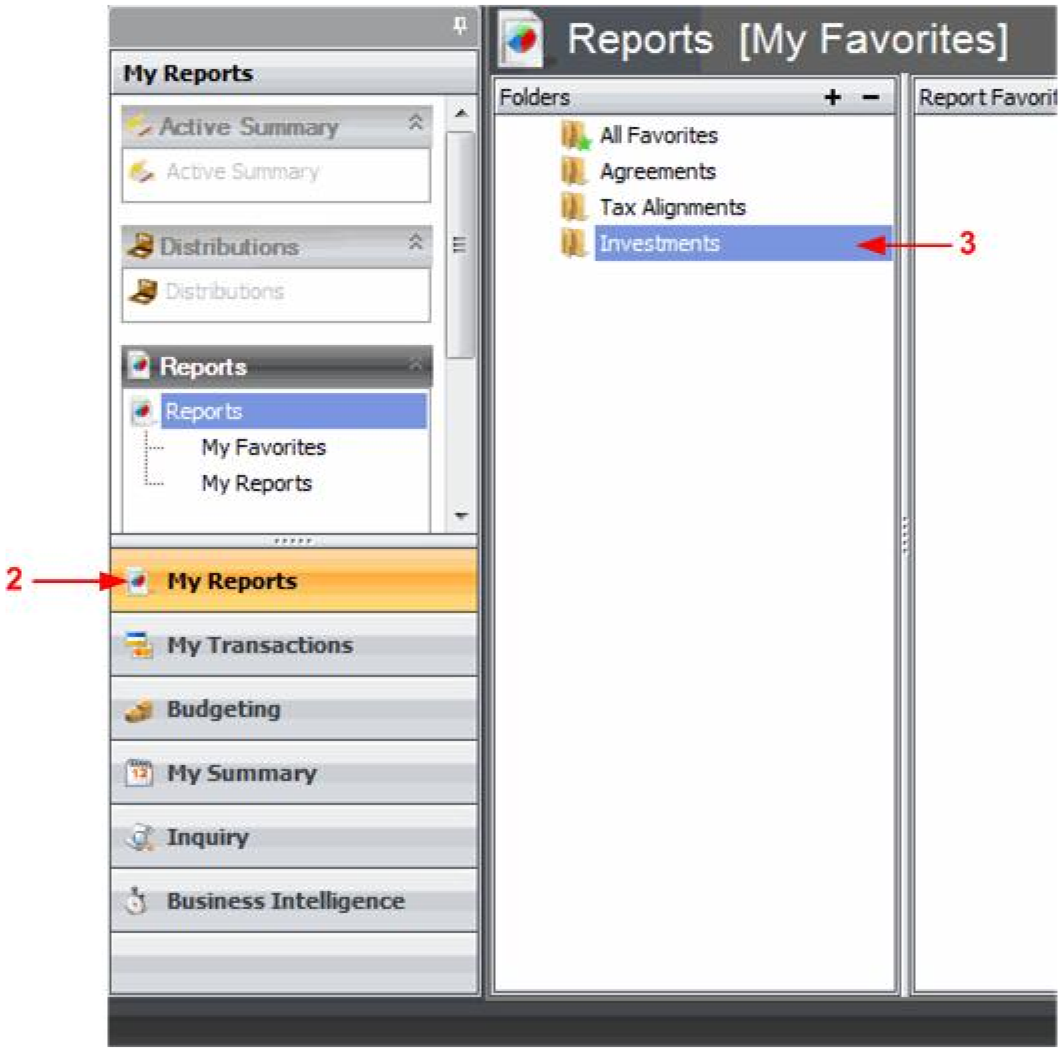
3. Highlight an existing report folder.
4. Click the **Rename** icon in the ribbon.



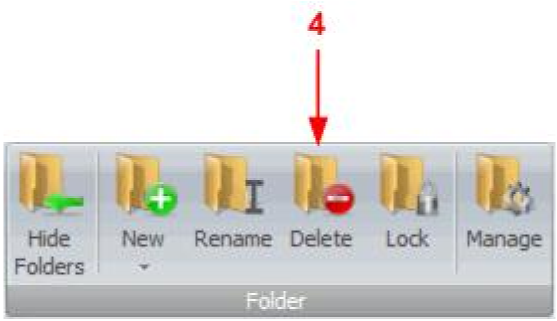
5. Edit the report folder name as necessary.
6. The report folder name is changed.

Delete a reports folder

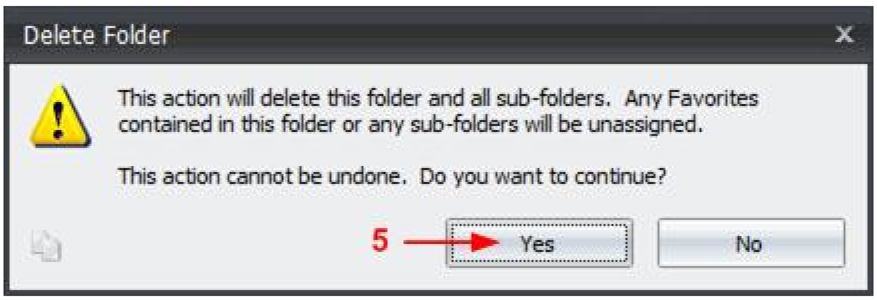
1. Launch the **Juris Suite** application.
2. Select **My Reports** (available via Snap-in).



3. Highlight an existing report folder.
4. Click the **Delete** icon in the ribbon.

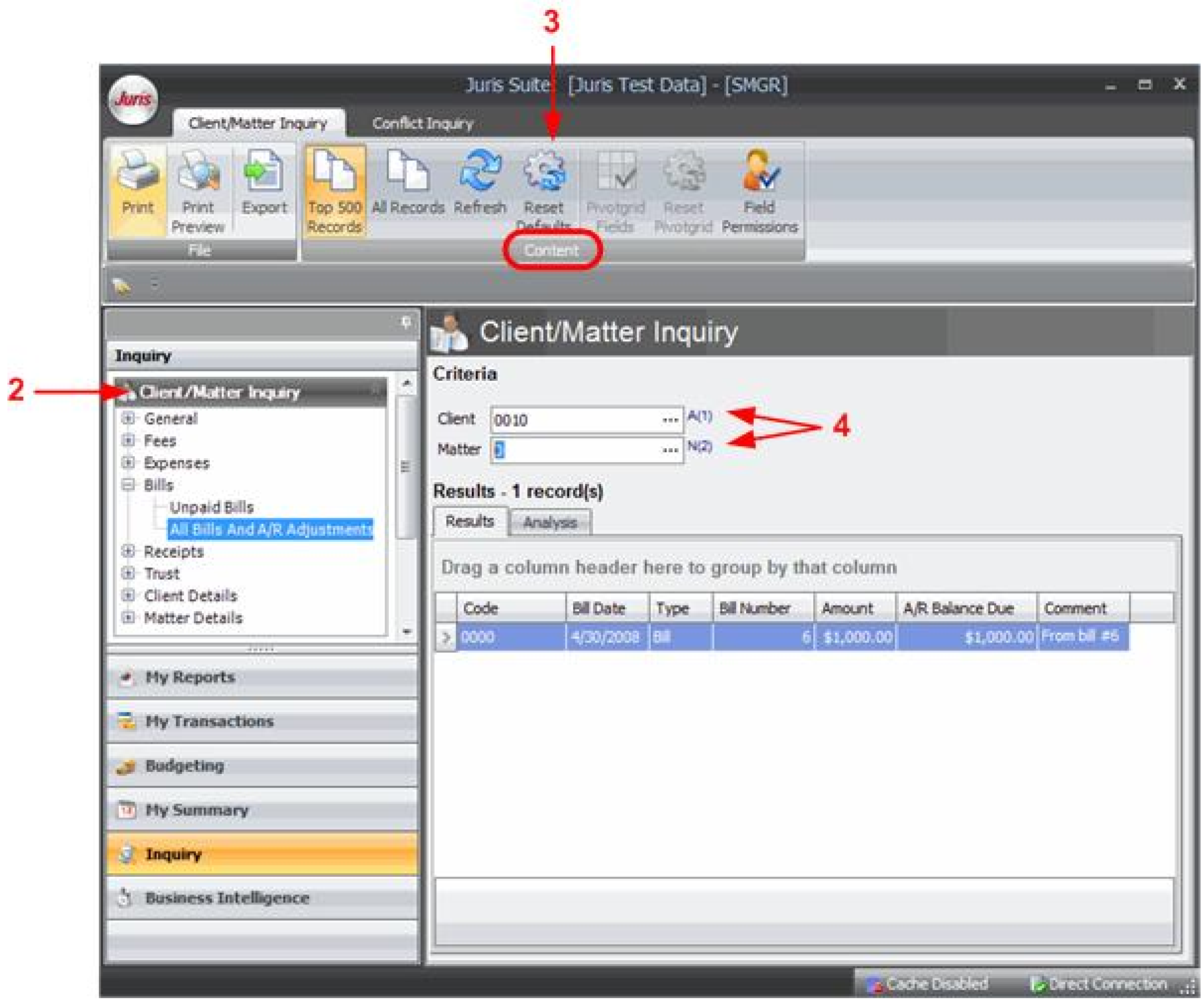


5. A pop up window containing a warning displays. Verify that the folder must be deleted by clicking the **Yes** button in the warning pop up. If you do not want to delete the folder, click the **No** button. Once you click the Yes button, the report folder is deleted.



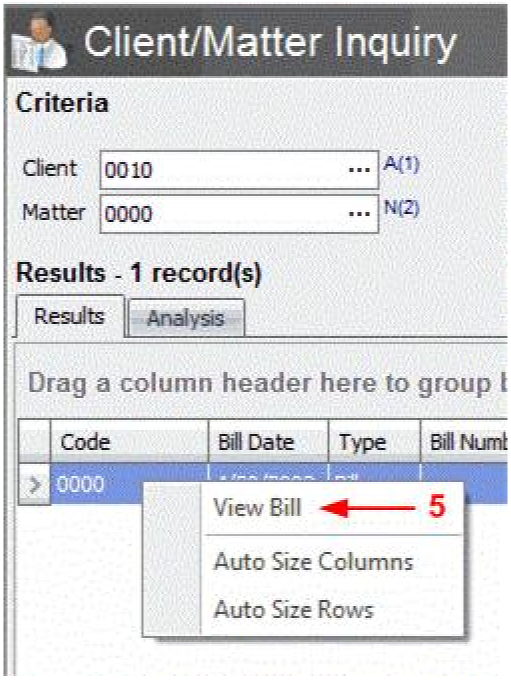
Review a client's bill

1. Launch the **Juris Suite** application.
2. Select **Inquiry** > **Client/Matter Inquiry** pane (available via Snap-in).



3. In the function ribbon at the top of the window, select a content request in the **Content** area.
4. Select the client, or both a client and matter, record that you would like to view in the **Criteria** area of the **Client/Matter Inquiry** pane. Note that if you leave the Matter field blank, all Matters for the selected Client will be displayed. Either the Client name or the code can be entered in the Client field; however, the client number will be displayed with the results by the system.

5. Right-click the bill record you want to view a copy of, and select **View Bill** from the pop up menu.

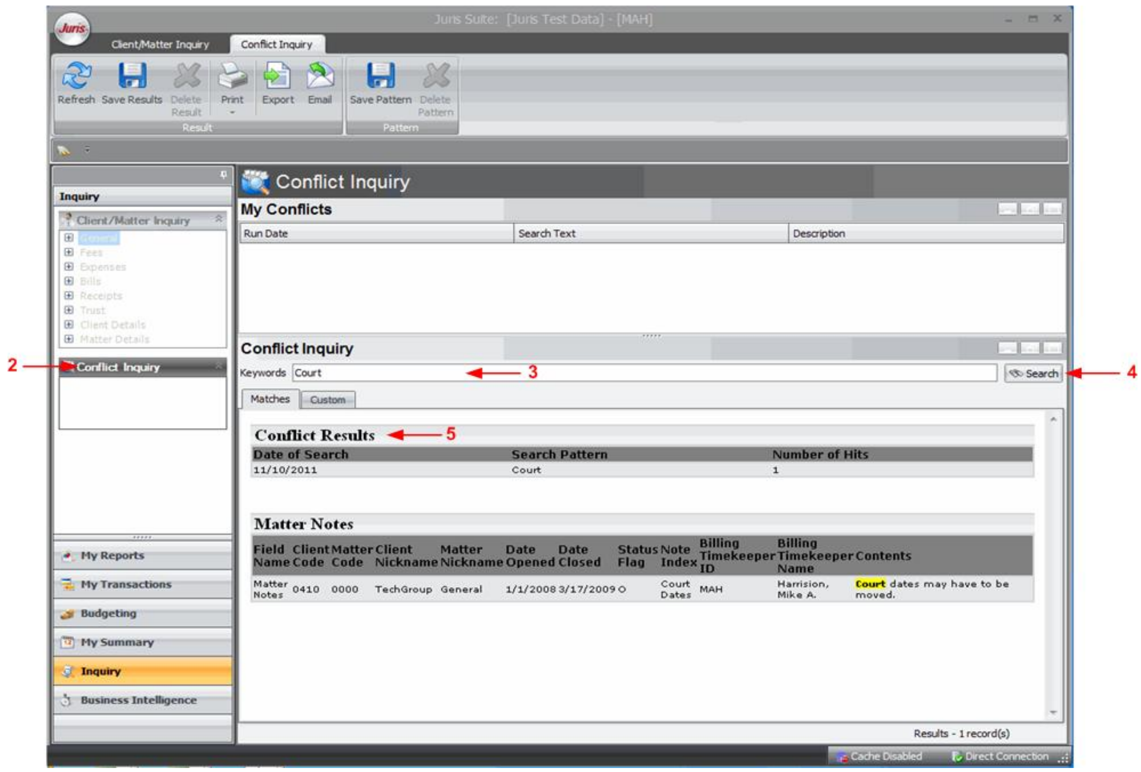


6. The copy of the bill may be printed or e-mailed.
7. Close the window.

Inquiry

Perform and review a conflict inquiry

1. Launch the **Juris Suite**application.
2. Select **Inquiry** > **Conflict Inquiry** (available via a Snap-in).



3. Type your search criteria in the **Keywords** field.
   - If you want to search for any record that includes at least one of several criteria that you specify, separate the search criteria by the word OR.
   - If you want to search for records that each contain more than one word, you must include the word AND before each additional search criterion.
   - If you want to search for records that contain your search criteria, but not an additional criteria that you specify, that criteria must follow the words AND NOT.

- If you are not sure of a single character within your search criteria, a question mark (?) may be used in place of a character. You can use more than one question mark (?) in a search.
- If you are not sure of more than one character within your search criteria, an asterisk (*) can be used in place of more than one character. You can use more than one asterisk (*) in a search.
- Quotation marks (" ") can be used to surround a string to be used as search criteria.
- Special characters can be included in the search criteria.

4. When you have entered all of your search criteria, click the **Search** button.
5. The results are displayed in the lower portion of the window.

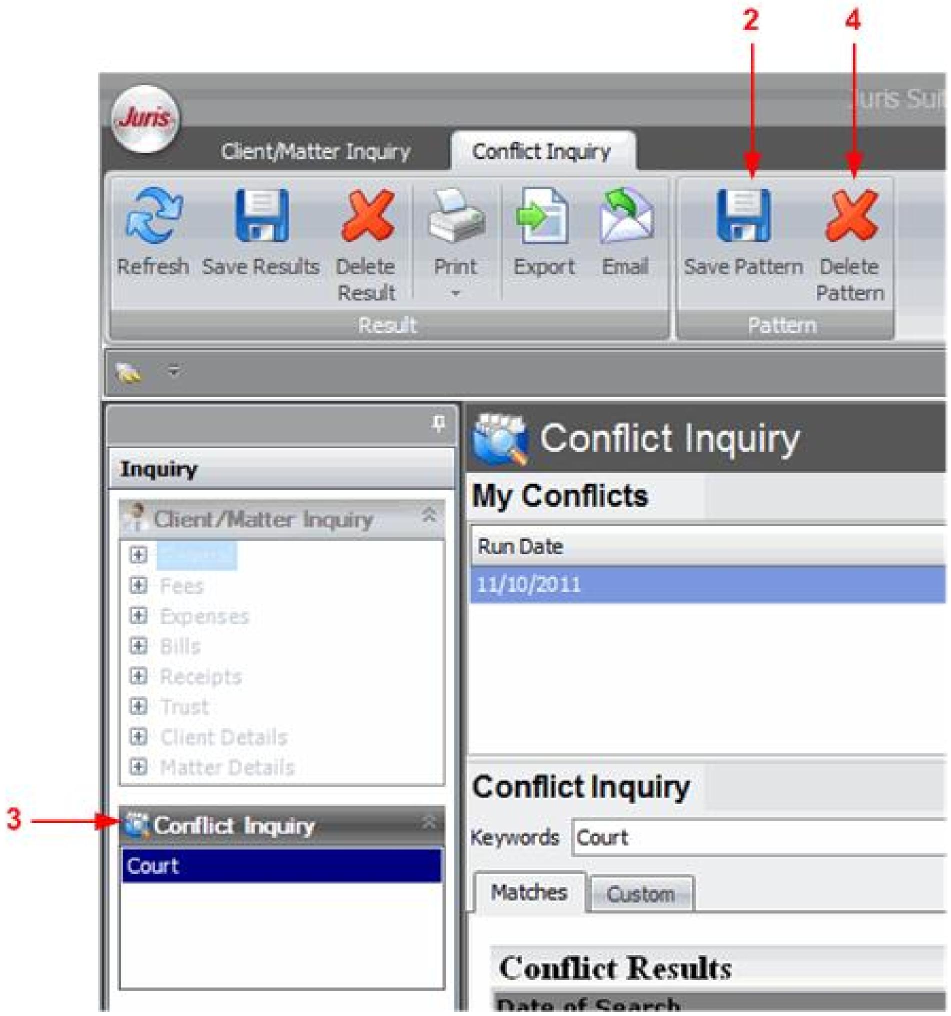
Save, print, delete, or email conflict inquiry results

1. To run a conflict inquiry, follow the steps in **Perform and Review a Conflict Inquiry.**
2. To save the results, click the **Save Results** icon.

3. The saved search results are available in the **My Conflicts** area.
4. To delete the saved search results, highlight the saved search results in the My Conflicts area, then click the **Delete Result** icon.

Save or delete a conflict inquiry search for re-use

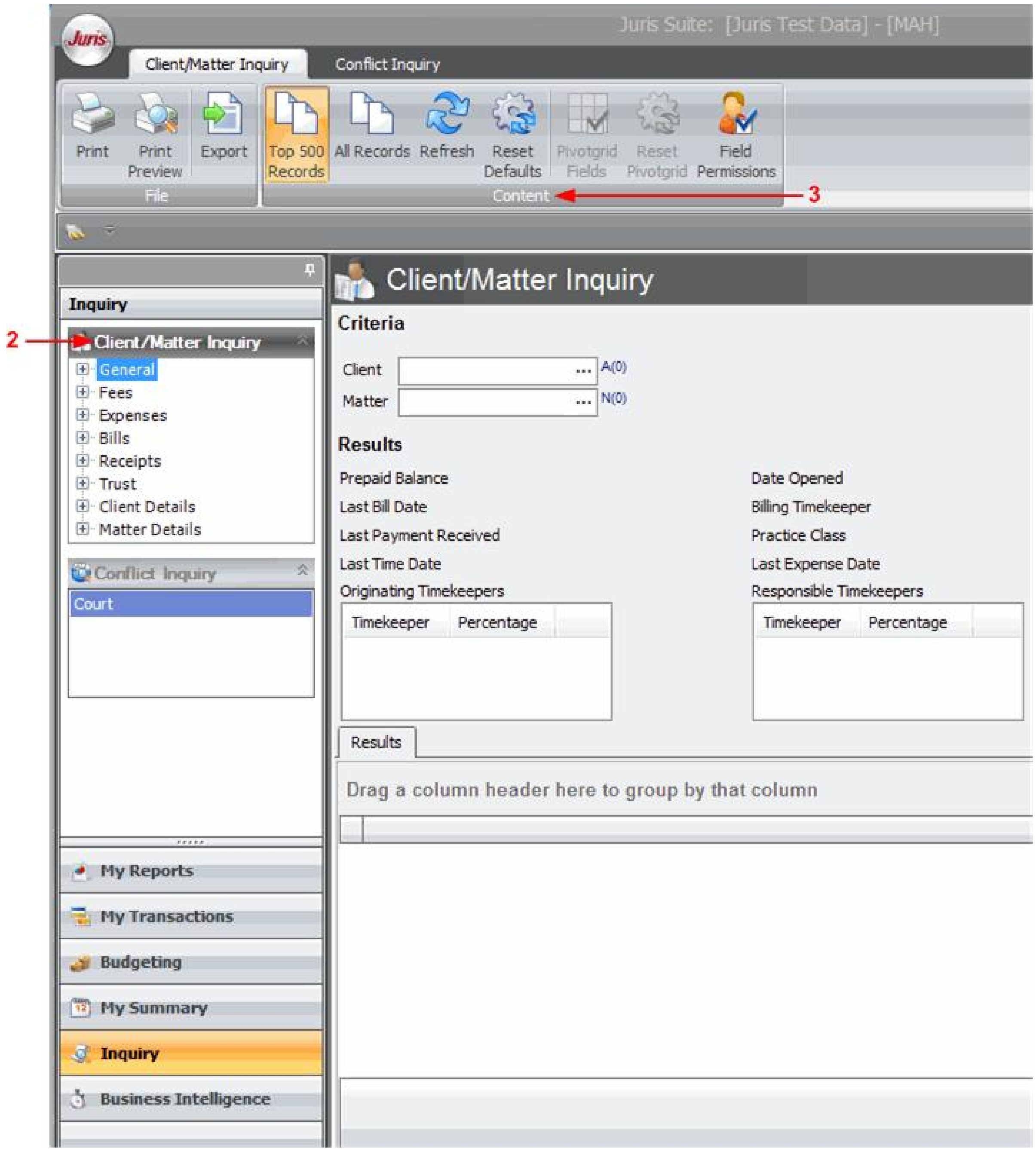
1. To run a conflict inquiry, follow the steps in **Perform and Review a Conflict Inquiry**.
2. To save the search pattern that was used in the Keywords field, click the **Save Pattern** icon.



3. The saved pattern will be displayed in the **Conflict Inquiry** area. Saving the search pattern allows the search to be repeated easily on new data.
4. To delete the saved search pattern, highlight the saved search pattern in the Conflict Inquiry area, then click the **Delete Pattern** icon.

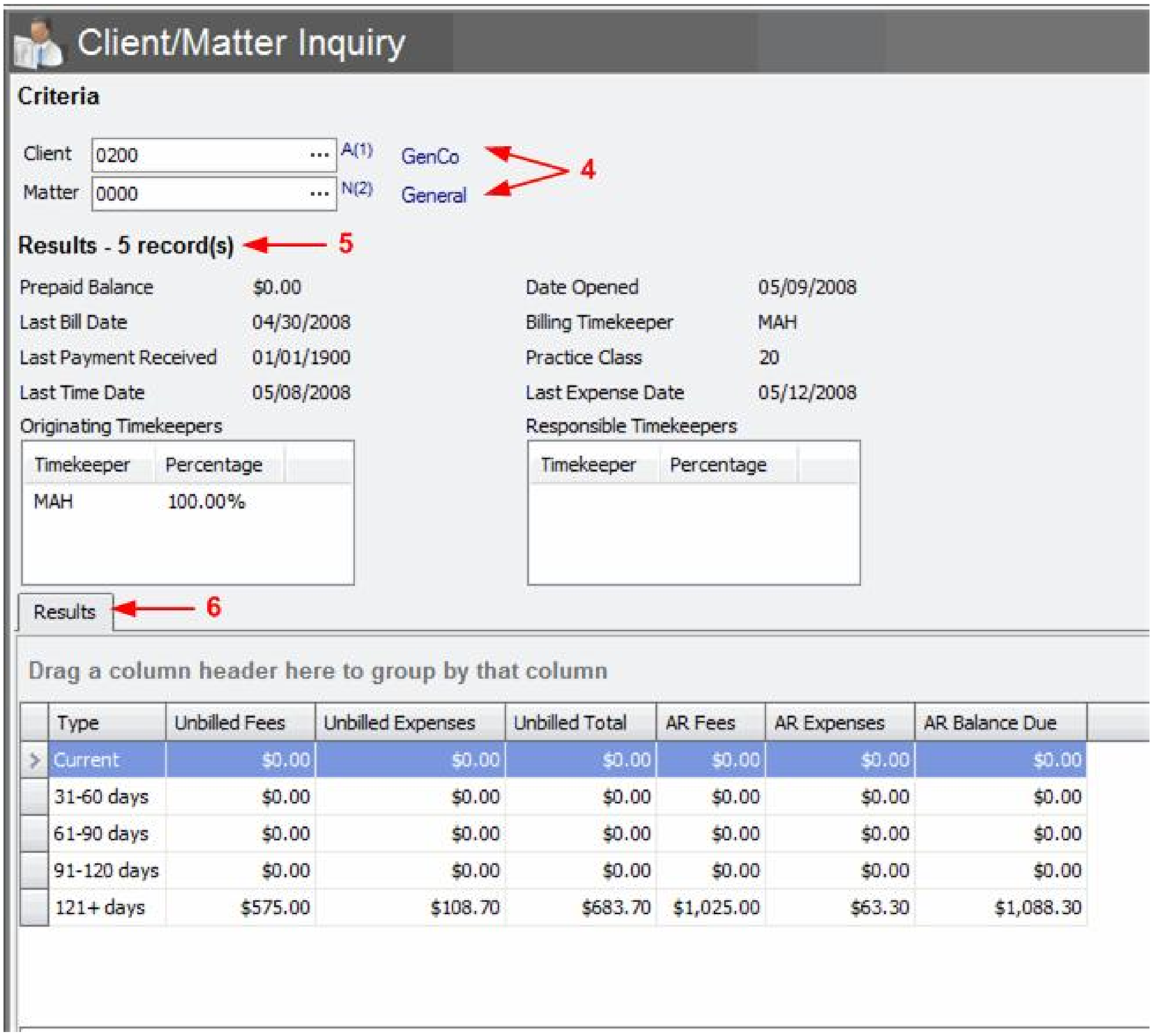
View a client's account information

1. Launch the **Juris Suite** application.
2. Select **Inquiry** > **Client/Matter Inquiry** (available via a Snap-in).



3. In the function ribbon at the top of the window, select a content request in the **Content** area.

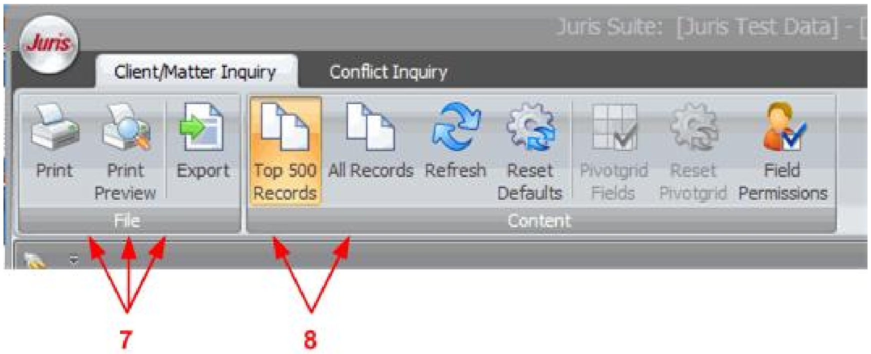
4. Select the client, or both a client and matter, that you would like to view in the **Criteria** area. Note that if you leave the Matter field blank, all Matters for the selected Client will be displayed. Either the Client name or the code can be entered in the Client field; however, the client number will be displayed with the results by the system.



5. The number of records returned is displayed in the bottom portion of the window.

6. The results of your inquiry are displayed in the Results pane. Select the Results tab to display the selected records in a dynamic grid. Select the Analysis tab (not shown in the example above) to complete a pivot analysis of the selected records.

7. Click the appropriate icon to print, export, or e-mail the results of your inquiry.



8. You can indicate whether the first 500 results of the inquiry, or all of the results, will be displayed. Select **Top 500 Records** to view the first 500 results or **All Records** to see the entire set of results.

Customize your client/matter inquiry results

1. Before you can customize your inquiry results, an inquiry must be run. To run an inquiry, follow the steps in View a Client's Account Information.
2. To resize a column, click the column border and drag it to make the column larger or smaller.
3. To rearrange the columns, click the column name and drag the name to the new location, and then drop the column.
4. To sort the presentation order of the data, click the column header for the data that will drive the re-sorting. The arrow beside the column header indicates whether the data are sorted in ascending or descending order. You may toggle the sorting order by clicking the column header again.
5. To add a new column, right-click in the header of any column, and select Column Chooser.
6. On the Column Chooser window that displays, columns may be added to your display by highlighting the column or columns, then clicking on the right arrow icon. Similarly, columns can be removed from your display. Remember to click the Save icon to save your changes.
7. To show data related to Sums, right-click in the top half of the gray bar at the bottom of results display below the column you wish to total. Select Sum, Min, Max, Count, or Average from the popup that displays. The sum information is displayed in the top portion of the gray bar.
8. To filter your returned data, hover over the column heading for the column that contains the data you want to use in your filter. The filter icon displays. Click on the filter icon, and a popup containing the data in the selected column is displayed. Select the data that you want to filter for. Only the data associated with the selection is displayed, and a Filter Bar displays. To remove the filter icon, click on the filter icon and select **All**. Alternately click the X beside the Filter Bar.
9. The results may be grouped, and sub-grouped by any column. To group by a column, drag the name of the column to the area marked with the text **Draft a column header here to group by that column**. Click the plus sign beside each group of data to view the details. To show the data by sub-groups, click another column name to the same

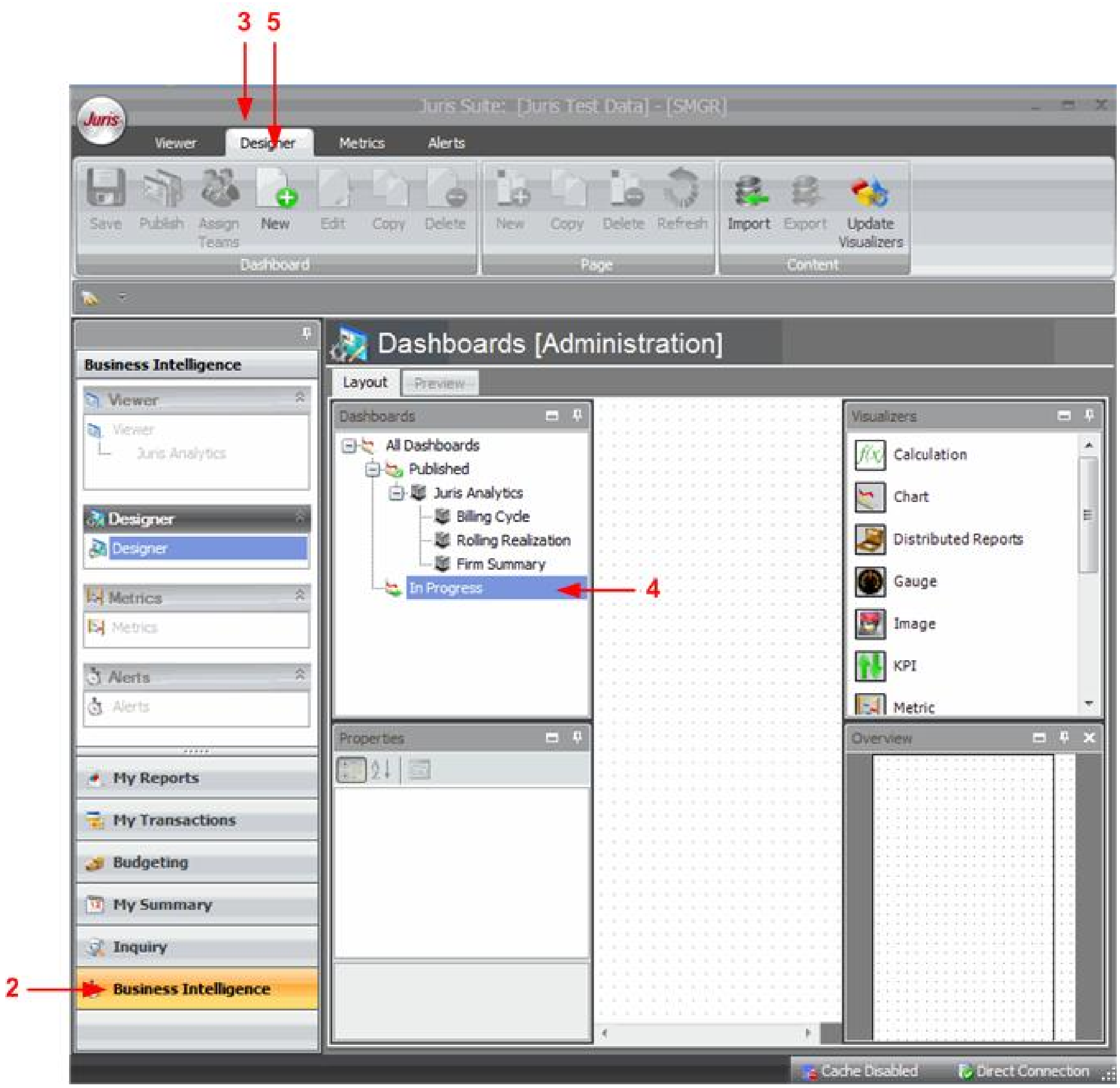
area of the window. Sub-totals can be added to each group by right-clicking in the column where you want to display a sub-total. Select the type of data you want to see in the popup menu.

10. Vertical and horizontal scroll bars allow you to view all of the data.
11. The changes you make will be available on future inquiries but are available only on your display and do not affect other users. Also, any changes you make can be undone easily by clicking the **Reset Pivotgrid** icon.

Business intelligence

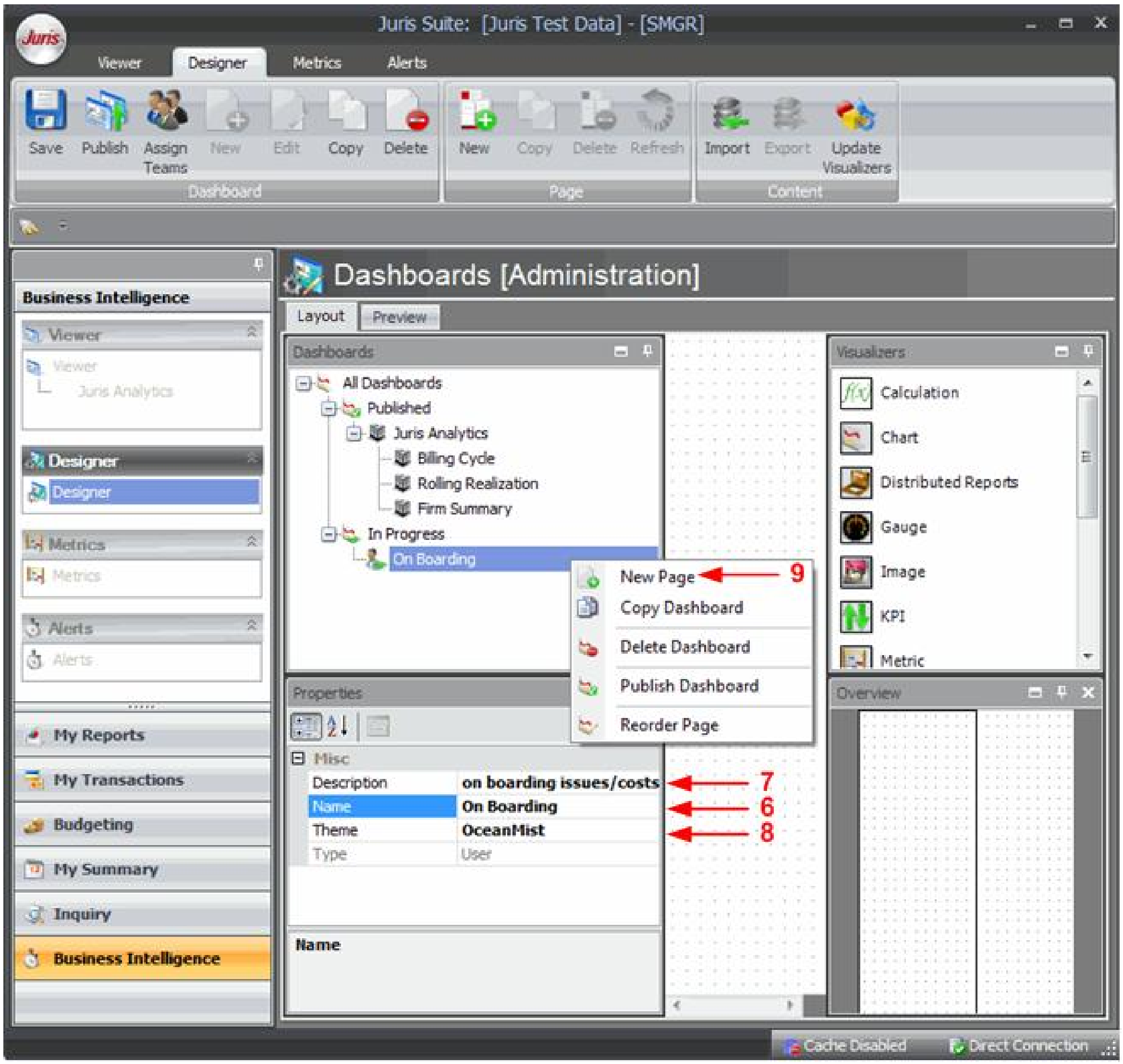
Create a dashboard

1. Launch the **Juris Suite** application.
2. Select **Business Intelligence** (available via a Snap-in).



3. Select the**Designer** tab.
4. Select the **In Progress** tree category.

5. Click the **New** button on the Dashboard tool ribbon.
6. Click inside the **Name** field within the **Properties** area. Enter a **Name** for the dashboard by overtyping the temporary system-provided name.

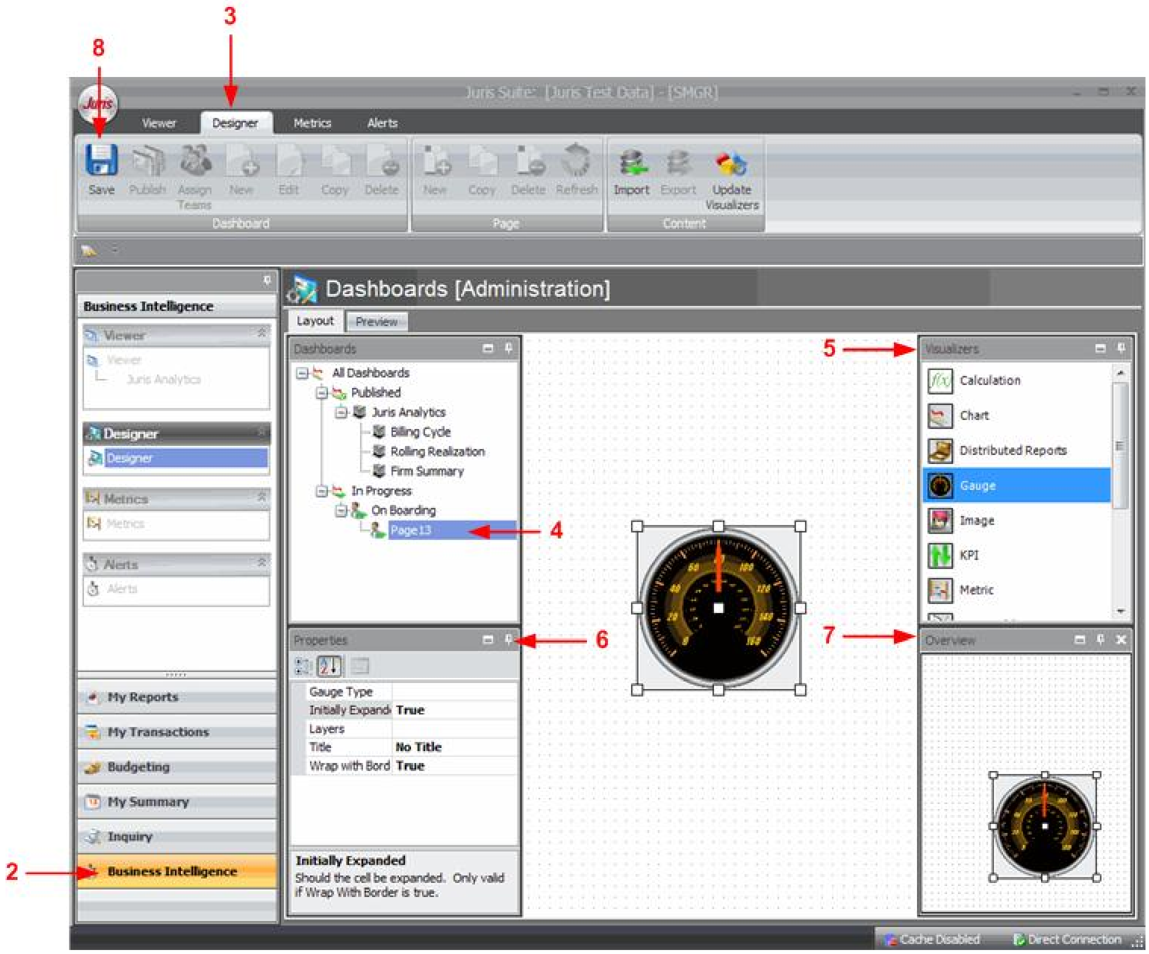


7. Click inside the **Description** field and provide a brief description.
8. Select a **Theme** for the Dashboard from the pull down menu.
9. Create a new page by right-clicking the name of the dashboard and selecting **New Page**.
10. The new page form displays. Use the **Name** field to rename the page.

11. Once you have a Dashboard and at least one page, you can start using the Display Grid and Visualizers.

Add a Visualizer

1. Launch the **Juris Suite** application.
2. Select **Business Intelligence** (available via a Snap-in).



3. Select the**Designer** tab.
4. Highlight the page on which a Visualizer must be added to the grid.
5. Select the appropriate **Visualizer** with the left mouse click and drag it to the desired location on the Display Grid. The Visualizer will appear with sizing squares. Adjust the size.
6. Use the **Properties** node to make adjustments.
7. The **Overview** pane will show a miniature view of the grid.
8. Click the **Save** button on the Dashboard tool ribbon.

Glossary

ABA – American Bar Association

UTBMS – Uniform Task Based Management System codes. A complete list of UTBMS codes is located on the ABA web site.

Shortcuts and navigation

Function	Accomplished By:
Delete	Alt + D If available, the Delete icon Form > Delete
Duplicate the value from the previous entry	F11
Expand a text code in time or expense narrative	Ctrl + Spacebar
Insert a new line in a narrative field	Ctrl + Enter Ctrl + Tab
Navigate to a new field	Enter key Tab key
New	Ctrl + N Form > New If available, the New icon
Open	Ctrl + O Form > Open
Open a new time entry form	Ctrl + T
Refresh current view	F5
Save	Ctrl + S Form > Save Click the Save icon
Select Form	Alt + F
Spell Check	F7