# Juris Suite User Guide

Version 3.2



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Revision Date

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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 the **Juris** ® Suite application.
- 2. Verify or change the company name in the **Company** box.

👆 Juris Suite Login 🛛 🗙
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User ID SMGR 🚽 3
Password 4
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- 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.

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For help, press F1	CAPS NUM

- 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.
- 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.

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- 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.

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Time Expense	Print Export	Grid Calendar	Tasks C Lists	<ul> <li>Duplicate</li> <li>Spel Check</li> <li>Power Edit</li> </ul>	Me "g Edit Filters Filter	Include Timekeeper	Include Billed Entries	) Import Entries Rule Designer 🕜 Appro Split Editor	oval Editor	
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My Timers (0) Approvals (0) My Reports										
🥩 Budgeting										
1 My Summary										
🥳 Inquiry										

- 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.

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		5 —	<ul> <li>• • •</li> <li>× •</li> </ul>	Transfer Time Mark as Memorand Mark as Ready to Su Submit Entries Delete	um Jbmit

- 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.

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	Tasks	Entry Key	Entry Status	Entry Date	Timekeeper ID
	100	INCE	Recorded	11/9/2011	 MAL

#### Correct a time entry

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

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- 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.
- 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.

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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.

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- 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.

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- 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.

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- 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.

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- 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.

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#### Correct an expense entry

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

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- 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.
- 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.

lew Refres	h Save	Delete	Print	Export	Grid Calendar	Tasks ALists	<ul> <li>Duplicate</li> <li>Spell Check</li> <li>Power Edit</li> </ul>	2 9 Me 9	(none) - 🔒 Edit Filters	Include Timekeepers Include Creators Include Owners
	Ехре	nse			Disp	olay	Edit	Filte		Filter Option
My Time		*	Curr	entLayo	ut: <new></new>					
			T	asks	Entry Key	Entry Status	Entry Date	Expe	ense Code	Client Code
- 6		_			1038	Recorded	11/1/2011	E106		Contract Contract

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

2

Set up a new timekeeper budget

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

Budgets Advanced			Juris Suite: [Ju	iris Test Data] -	[MAH]			
Save New Budget Copy Add	l Options Payroll	Phase Add Addition alls Rows Content	nel Update Actual from Juris	s Update Timekeep values	per Print Expo Budget To	Construction Review Import Budget Excel from Excel Import / Export	t XLS Templates Refre	sh Lock or Unlock Past Periods View
Budget New Client Ma	er Budget :dger Budget tter Budget	ing [ My Bu	udgets]	Created By	Last Modified By	Last Modified	e Status	Budget Yea
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Budgeting     My Summary     Inquiry								

- 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.

Budget Name	Reorg Bu	ldget	Import Actuals	— 6		
	RB			Se	lect Additional Views	<b>▲</b> —10
Budaat Vaar	2011				Expense View	
Budget fear	2011				Task View	
<ul> <li>Budget Description</li> </ul>	Reorgan	ize cost functions	-		Fee View	
La Luca						
Select View		mekeepers				
Timekeeners	0	arag a column header he	ere to group by that column			
Expense Code	s	Select	Id		Timekeeper	Personnel Type
Task Codes			BJS		Smith, Benjamin J.	Associate
			MCD		Marris, Douglas J.	Partner
			FIRM		FIRM, Timekeeper	Other
			JRP		Perrro, Juan R.	Associate
	-		KAT		Takoma, Kimberly A.	Paralegal
			LAH		Herron, Lee Ann	Associate
			MAB		Benova, Magda A.	Legal Assistant
			MAH		Harrision, Mike A.	Partner
			MEC		Carter, Michelle E.	Paralegal
			SGT		Thomas, Susan G.	Associate
		0	TLR		Randall, Timothy L.	Paralegal

- 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.

Budget Name	Relocation Funds		Import Actua	Is <del>- 7</del>
Budget Code	RLF			
Budget Vear	2011		k;	
Budget Description	Delegation through	2012	1	
budget bescription	Relocation through	1 2012		÷
		a (*		
Account Level		Drag a colum	header here to grou	up by that column
Select Account Le	vel	Selected	Main Account	Account Name
Pidin Account		>	1001	Cash - Operating
			1002	Cash - Trust
			1003	Cash - Petty
			1004	Cash - Investments/Savings
			1005	Cash - Prepaid
			1010	Furniture and Fixtures
			1011	Equipment
			1012	Automobiles
			1013	Real Estate
			1014	Leasehold Improvements
			1015	Library
			0.02.722	and the second

- 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.

Sel pha	ect the Client and Cl ase information and s	ent Matter for elect additiona	the new budget. Add Bud I views. Finally select the	lget Name and ye task codes for the	ar. Optionally you may e budget.	ad
Select Matter						
Client	0223	A(1)	George Willis			
Matter	0001	N(1)	Copyright			
Budget Informat	ion					_
Budget Name			GW Funds Tracking		Phase Options 🔫	_
Budget nume	CUIE		Pudant Vana and		Budget uses Phase	es
Budget Code	GWF		budget rear 2011		Phase Name	
Budget Descr	ption				Phase 0	_
			Select Additional	Views	Phase Number 0	<u>)</u>
			Expense view	'	Start Date	
12	1:	3	Fee View		11/10/2011	
			-		End Date	
					11/10/2011	_
Select Task Co	odes Select Expe	nse Codes				
Select		Task Cod	le	Description		1
>		B 100		Administration	fer en	1
		B110		Case Administ	ration	
		B120		Asset Analysis	and Recovery	
		B130		Asset Dispositi	on	
and the second se		B140		Relief from Sta	417	

- 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).

Active Summary	My Distribution	s Distribution I	Maintenance	Distribution Log	My F
Add Edit Copy D	lelete Preview Re	fresh Show Detail	Hide New	Rename Delete	Manag
Favorite		View		New Folder	
		eports [M	y Fa\ 🚺	New Subfolder	
My Reports	Folders	+ -	- Report Fave	orites	
Active Summary		All Favorites Agreements			
		Tax Alignments			
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Reports	× =				
Reports My Favorites					
My Reports					
Queries	*				
🞆, Queries					
Schemas	* -				
A DESCRIPTION OF A DESC					

- 4. Select New Folder from the drop down menu.
- 5. Overtype the name for the folder.
- 3. Click the **New** icon in the ribbon.

2

- 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).

Clent/Matter Inquiry Clent/Matter Inquiry Print Print Preview Fid	Conflict	Juris Sul Inquiry I Refresh R	tel [Juris Te	st Data	- [SMGR] Pield d Permissions			
Transfer	6	📩 Clier	nt/Matter	r Inqu	iiry			
Cline Press General G	#	Client 0010 Matter Results - 1 m Results 4 Drag a colu	ecord(s) alysis umn header Bill Date	Al	group by the	- 4	n A/R Balance Due	Comment
My Reports		> 0000	4/30/2008	84		6 \$1,000.00	5 \$1,000.0	0 From bill #5
🔁 My Transactions								
🤳 Budgeting								
D My Summary								
Inquiry								
1 Business Intelligence	_							

- 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.

Criteri	а			
Client	0010			A(1)
Matter	0000			N(2)
Result	s Ar	nalysis	horo	to group
Result Drag Coo	a colu de	umn header Bill Date	here Typ	e Bill Nu
Result	a colu de	nalysis Imn header Bill Date View Bill	here Typ	e Bill Nu
Result	a colu de	Imn header Bill Date View Bill Auto Size	here Typ	e Bill Nu

- 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).

Refresh Save Results Delete Result Result	Print Export Email Save Pattern D Print Export Email Save Pattern D Print Print Prin	elete ittem		
<u>&gt;</u>				
Inquiry	My Conflicts		_	
Client/Matter Inquiry	Run Date	Search Text	Description	
Becepts     Trast     Trast     Class Details     Matter Details     Conflict Inquiry	Conflict Inquiry Keywords Court Matches Custom Conflict Results Date of Search 11/10/2011	-5 Search Pattern Court	Number of Hits	@ Search
	Matter Notes		Billion Billion	
	1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	Matter Date Date Status No	te Timekeeper Timekeeper Contents	
<ul> <li>My Reports</li> </ul>	Field ClientMatterClient NameCode Code Nicknam	rentickname Openeu Closed Flag Inc	Name	
<ul> <li>My Reports</li> <li>My Transactions</li> </ul>	Field Client Matter Client Name Code Code Nicknam Matter 0410 0000 TechGroup	o General 1/1/2008 3/17/2009 O Dat	ut MAH Harrision, Court date es MAH Mike A. moved,	s may have to be
<ul> <li>My Reports</li> <li>My Transactions</li> <li>Budgeting</li> </ul>	Field Client Matter Client Name Code Code Nicknam Matter 0410 0000 TechGroup	p General 1/1/2008 3/17/2009 O Dat	ID Name Int Harrision, Count date es MAH Mike A. moved.	s may have to be
My Reports     My Transactions     Budgeting     My Summary	Field ClientMatterClient NameCode Code Nicknam Matter Notes 0410 0000 TechGroup	p General 1/1/2008/3/17/2009O Cost	urt MAH Hanrision, <b>Court</b> date es MAH Mike A. moved.	s may have to be

- 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).

Juns Client/Matter Inquiry	Juris S Conflict Inquiry	uite: [Juris Test Data] - [MAH]
Print Print Preview File	All Records Refresh Reset Defaults Fields Pivotgrid Rese Content	Field id Permissions
<b>N</b> 7	Client/Matter Inquiry	
Inquiry Client/Matter Inquiry General Fees Expenses Bills Receipts Client Details Client Details Conflict Inquiry Court	Criteria Client A(0) Matter N(0) Results Prepaid Balance Last Bill Date Last Bill Date Last Time Date Originating Timekeepers Timekeeper Percentage Results Results Drage a column basedor base to grow	Date Opened Billing Timekeeper Practice Class Last Expense Date Responsible Timekeepers Timekeeper Percentage
		o by that column
My Reports		
Budgeting		
🦪y summary		
👌 Business Intelligence		

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.

menu						
lient 0200		• A(1) GenCo 🤜				
Matter 0000		N(2) General 🚄	->4			
esults - 5 red	cord(s) 🔫 —	- 5				
repaid Balance	\$0.00		Date Opened	c	5/09/2008	
ast Bill Date	04/30/2	008	Billing Timekeep	er N	ИАН	
ast Payment Re	ceived 01/01/1	900	Practice Class	2	20	
ast Time Date	05/08/2	008	Last Evnense D	ate (	5/12/2008	
		000	Lust Expense D	alle a	5112/2000	
)riginating Timek	eepers		Responsible Tim	iekeepers		
Driginating Timek Timekeeper MAH	eepers Percentage 100.00%		Responsible Tim	ekeepers Percentage		
Driginating Timek Timekeeper MAH Results	Percentage 100.00% 6 nn header her	re to group by tha	Responsible Tim Timekeeper	Percentage		
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Driginating Timek Timekeeper MAH Results Drag a colur Type > Current	eepers Percentage 100.00% 6 nn header her Unbilled Fees \$0.00	re to group by tha Unbilled Expenses	At column Unbilled Total	AR Fees	AR Expenses	AR Balance Due \$0.00
Driginating Timek Timekeeper MAH Results Drag a colur Type > Current 31-60 days	eepers Percentage 100.00% 6 nn header her Unbilled Fees \$0.00 \$0.00	re to group by tha Unbilled Expenses \$0.00 \$0.00	at column Unbilled Total	AR Fees \$0.00 \$0.00	AR Expenses \$0.00 \$0.00	AR Balance Due \$0.00 \$0.00
Priginating Timek Timekeeper MAH Results Drag a colur Type Current 31-60 days 61-90 days	eepers Percentage 100.00% 6 100.00% 0 100.00% 0 100 100.00% 100 100.00% 100 100.00 100 100 100 100 100 100 100	re to group by tha Unbilled Expenses \$0.00 \$0.00 \$0.00	t column Unbilled Total \$0.00 \$0.00	AR Fees \$0.00 \$0.00	AR Expenses \$0.00 \$0.00	AR Balance Due \$0.00 \$0.00 \$0.00
Priginating Timek Timekeeper MAH Results Drag a colur Type Current 31-60 days 61-90 days 91-120 days	eepers Percentage 100.00% 6 100.00% 100.00% 100.00% 100.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00	re to group by tha Unbilled Expenses \$0.00 \$0.00 \$0.00 \$0.00	At column Unbilled Total \$0.00 \$0.00 \$0.00	AR Fees \$0.00 \$0.00 \$0.00 \$0.00	AR Expenses \$0.00 \$0.00 \$0.00 \$0.00	AR Balance Due \$0.00 \$0.00 \$0.00 \$0.00

- 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:		
	Alt + D		
Delete	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		
lesset a navy line in a navyative field	Ctrl + Enter		
Insert a new line in a narrative lield	Ctrl + Tab		
	Enter key		
Navigate to a new field	Tab key		
	Ctrl + N		
New	Form > New		
	If available, the New icon		
Onen	Ctrl + O		
Open	Form > Open		
Open a new time entry form	Ctrl + T		
Refresh current view	F5		
	Ctrl + S		
Save	Form > Save		
	Click the Save icon		
Select Form	Alt + F		
Spell Check	F7		