Juris®

Administration Guide

Version 3.2

TOC

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Revision Date

LexisNexis

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

Obtain the software

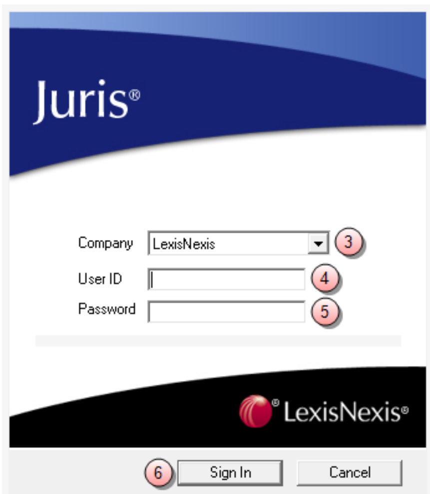
Visit the Juris® Support Center for installation/upgrade instructions and to download the software. For assistance, call us toll free at 877.377.3740.

Login and Password Assistance

Sign into Juris

To sign into Juris:

1. Click the Windows **Start** button.
2. Select **All Programs** > **Juris** > **Juris** to open the login window.



3. Click the **Company** arrow and select the company database in which you want to work.

> **NOTE:** The Company box is only visible if your firm has multiple databases to which Juris is connected. If you do not see the Company box, skip step 3.

4. In the **User ID** box, type the name you use to sign into Juris.
5. In the **Password** box, type your Juris password.
6. Click **Sign In**.

   The Juris main window opens.

> **NOTE:** If Juris does not allow you to sign in, contact your system manager or administrator.

Database administration

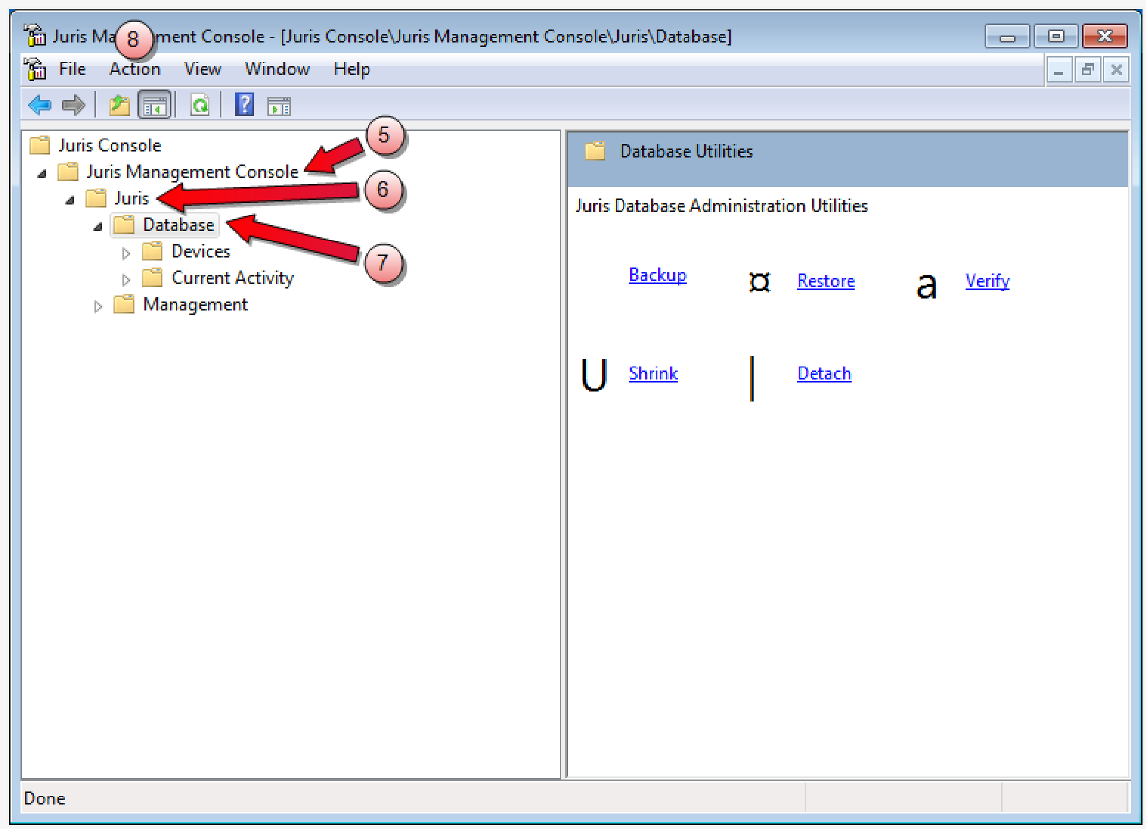
Back Up and Restore Juris SQL Database

There are several tools that can be used to backup the Juris databases. However, in this document, we cover only the Juris Management Console backup and restore procedures. For more information regarding the other software packages, please see the Backing Up and Restoring the Juris SQL Database article on the Juris Support Center.

Backup Juris SQL database

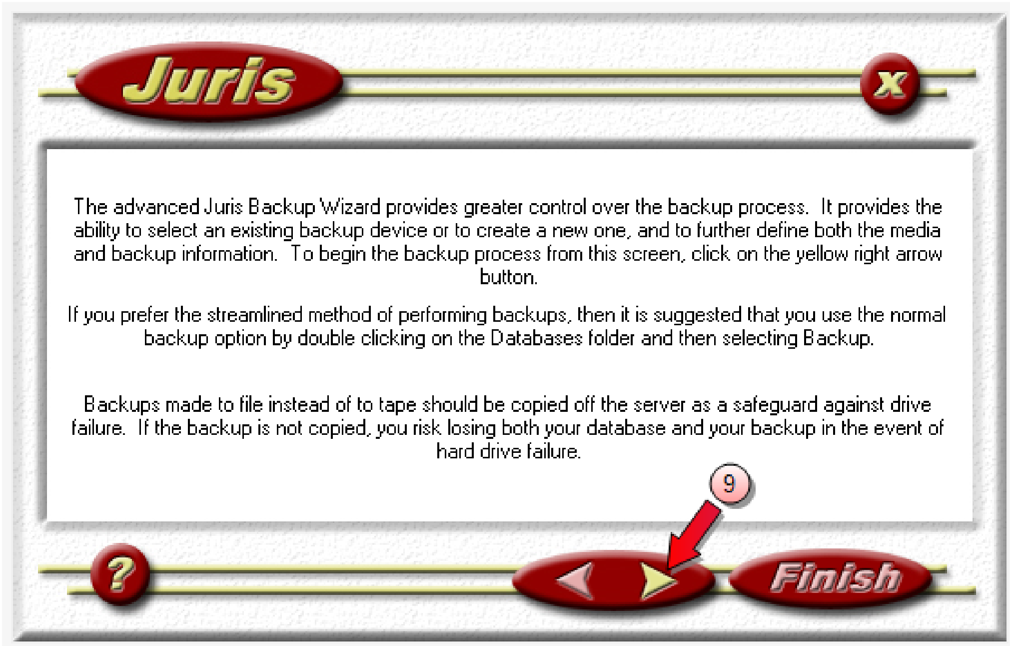
To back up the Juris SQL database:

1. Verify that all users have closed out of Juris.
2. Click the Windows **Start** button.
3. Select **Start** > **Programs** or **All Programs** in Windows 7.
4. Select **Juris** > **Administrative Tools** > **Juris Management Console** to open the console.

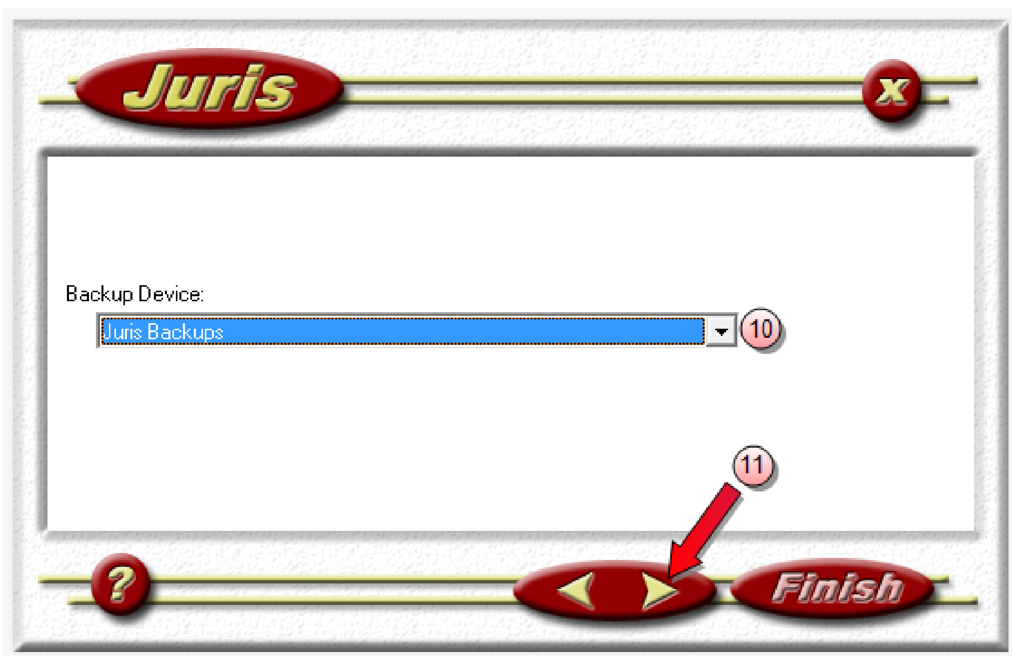


5. Double-click **Juris Management Console** to expand the folder.
6. Double-click **[your firm's name]** to expand the folder.
7. Click the **Database** folder to select it.
8. Select **Action** > **All Tasks** > **Backup** on the menu to open the Juris Backup wizard.

> **TIP:** If you save to the same device and file every time, and do not want to enter a different file name, you can click on the **Backup** link (or icon) in the Database Utilities pane (the right pane,) and then go directly to **step 14** to start the backup.



9. Click the right arrow to display backup device information.



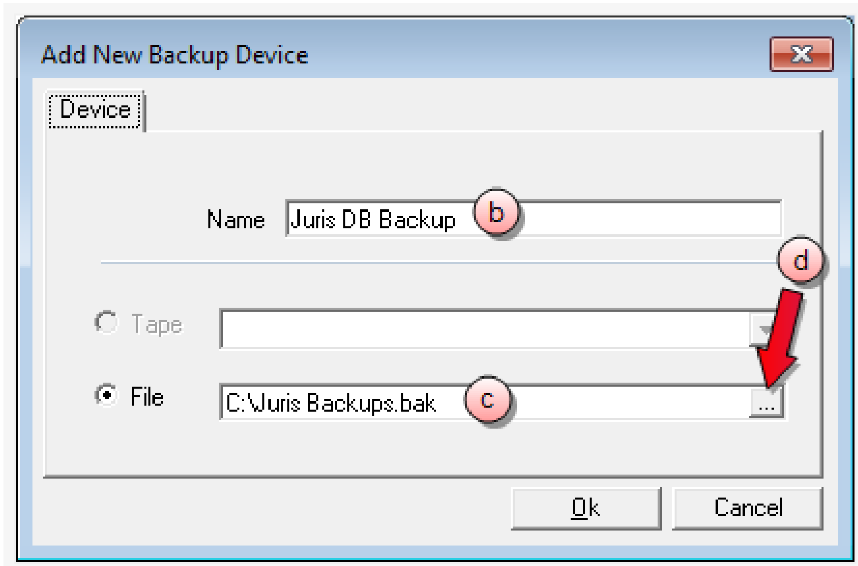
10. Click the **Backup Device** arrow, and select the device to which you want to back up.

> **Warning:** If you have not yet setup a backup device, you need to do so before you can continue with step 11.

Setup backup device steps

a. Click the **Backup Device** arrow and select **New Backup Device** from the list.

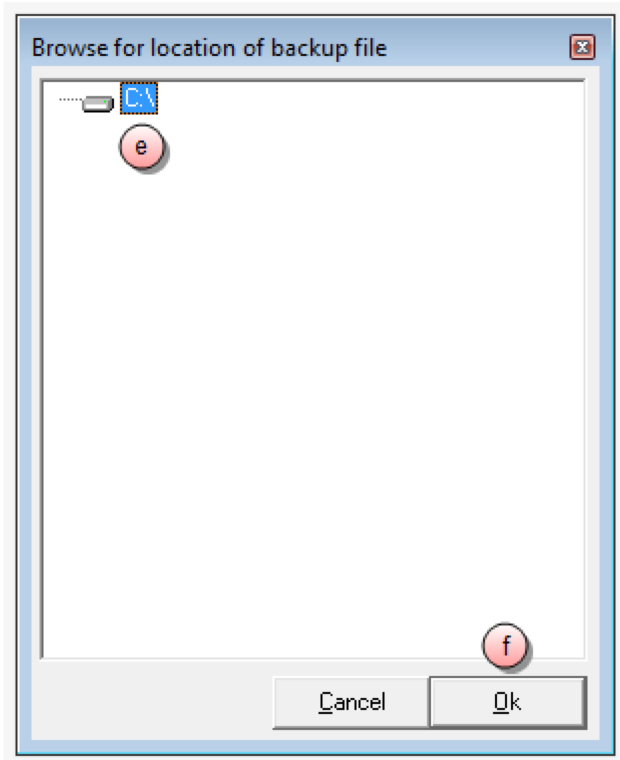
The Add New Backup Device window opens.



b. In the **Name** box, type a name for your backup. It is suggested that you add the day and date to the name for easier identification.

c. Select the **File** option to enter a destination path where you want to save your backup.

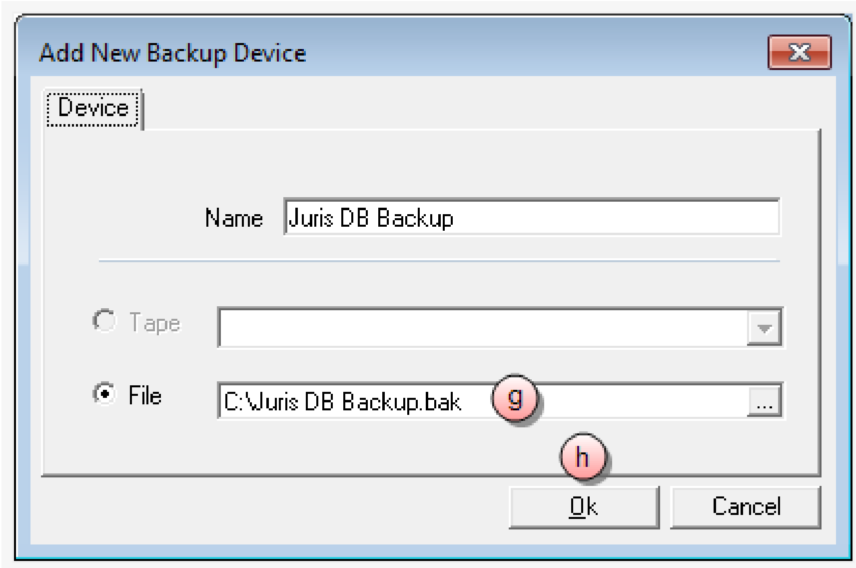
d. Click the **...** (**ellipse**) button to open the Browse for location of backup file window.



e. Browse to and select the folder in which you want to save your backup.

f. Click **OK**.

You are returned to the Add New Backup Device window.



g. In the **File** box, at the end of the file folder path, type a back up file name and add **.bak** to it.

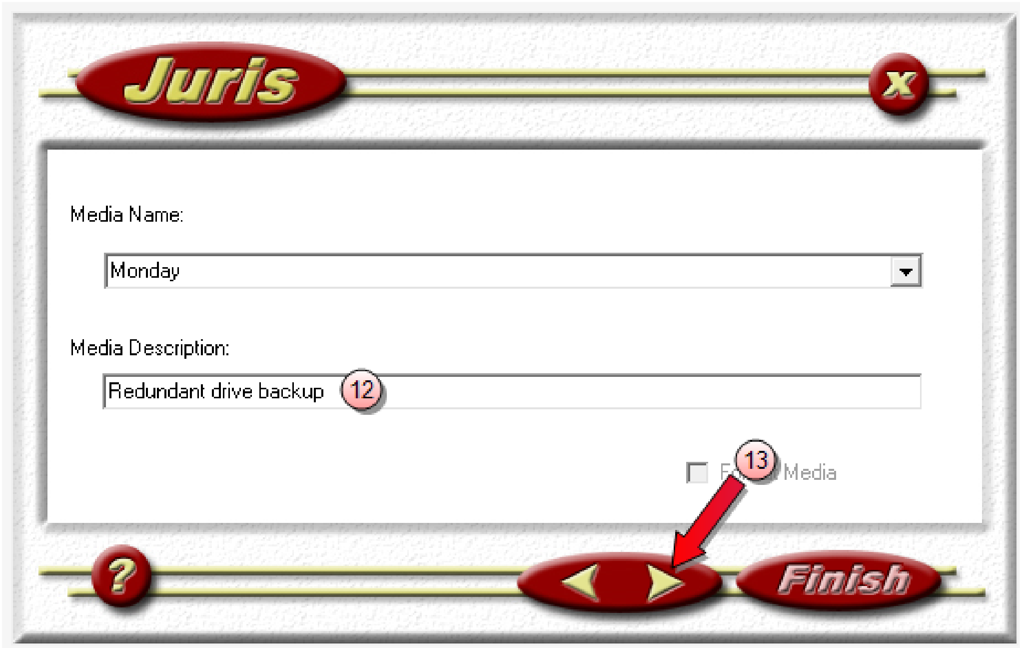
> **NOTE:** Do not place a space between the file name and the .bak extension.

Adding .bak identifies the files as a "back up" file to the Juris Management Console, should you have to restore from this back up.

h. Click **OK**.

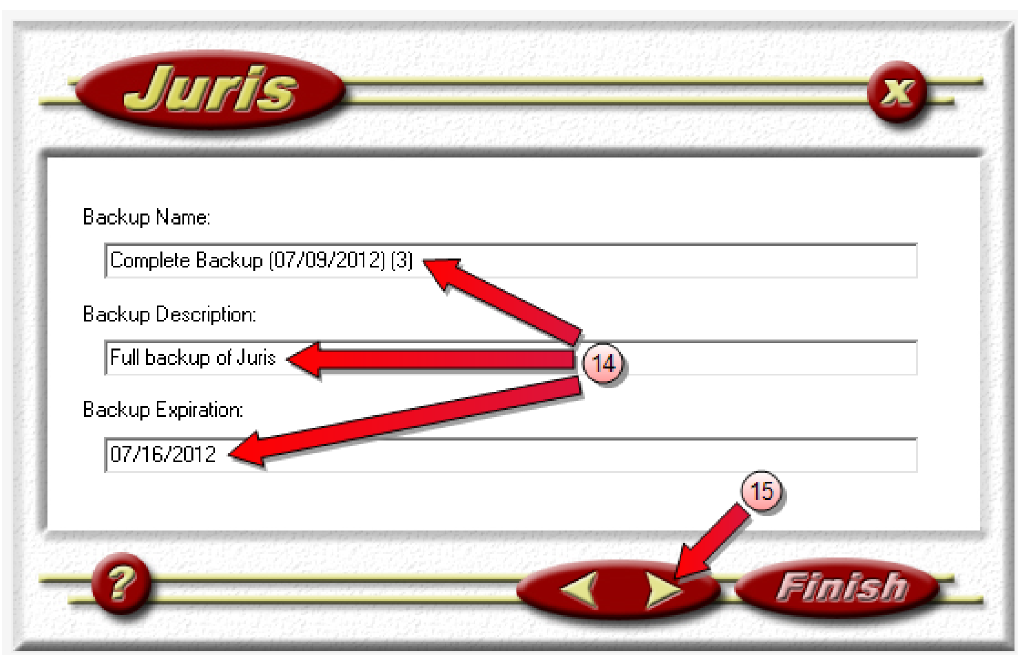
You are returned to the Backup Device window in the wizard.

11. Click the right arrow button to display media information.



> **NOTE:** The Media Name box is automatically populated from the Windows System Clock. **Please do not change the default.**.

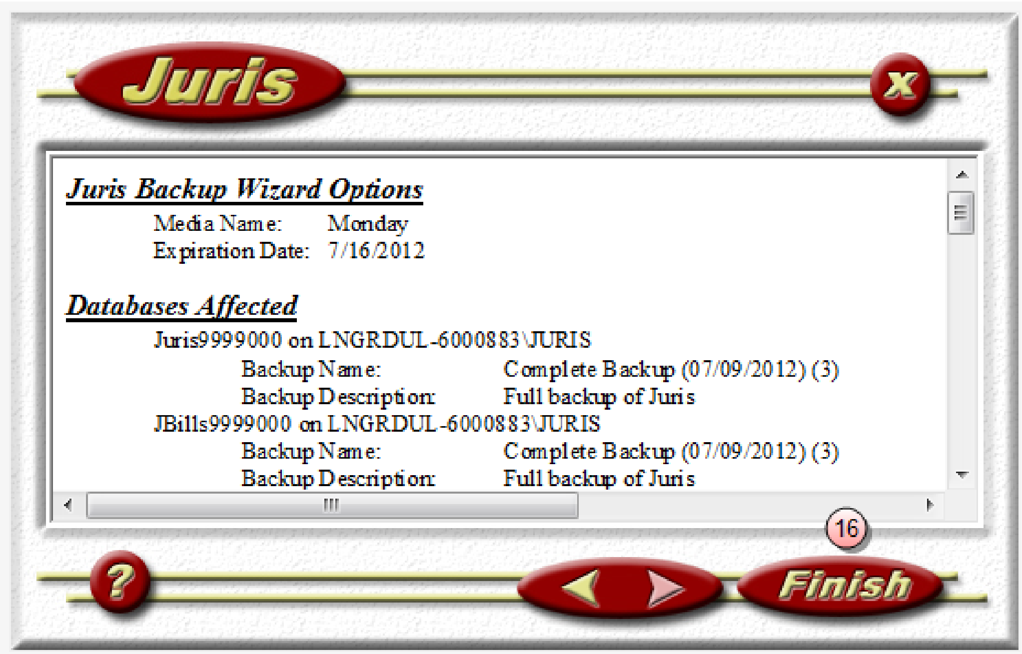
12. In the **Media Description** box, accept the default, or type a short description.
13. Click the right arrow button to display the Backup information.



You have the option of changing the Backup Name, Backup Description and Backup Expiration Date at this point.

14. Optional) Make changes to **Backup Name**, **Backup Description** and **Backup Expiration Date**.

15. When done, click the right arrow once to display the Backup Confirmation listing.



16. Click **Finish** to start the backup.

    When the backup is finished, you receive notification via a report in the Juris Management Objects window.

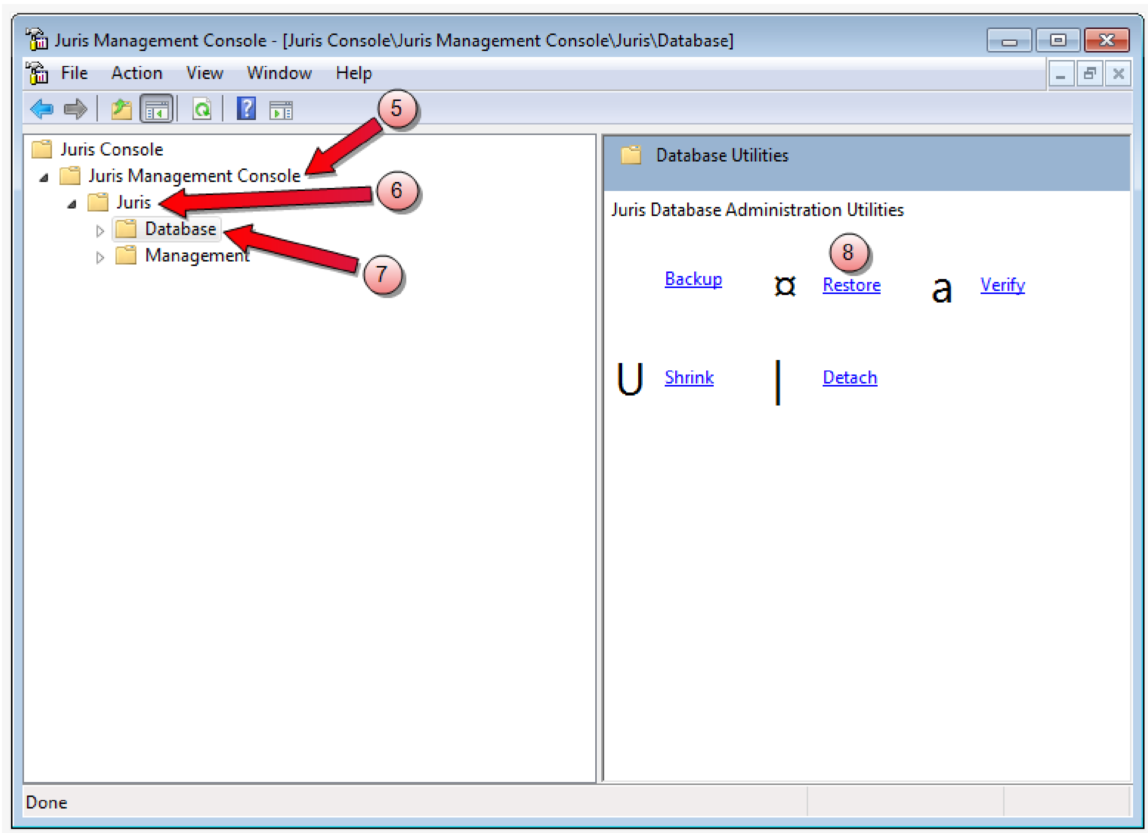
17. Click the window **Close** button to close the Juris Management Objects window.

> **NOTE:** If you backup to a file, the file should be copied or moved onto a tape, CD, or other removable media to protect yourself in the event of a hard drive failure. Once the backup file has been copied to other media, the file residing on the server must be deleted before the next backup can be performed successfully.

Restore Juris SQL database

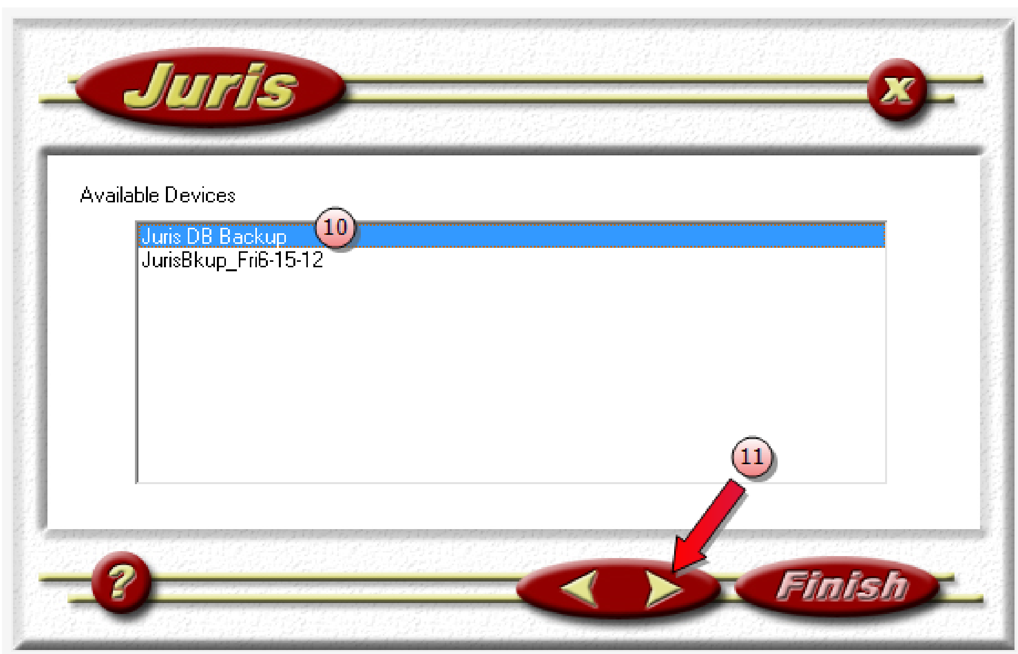
To restore the Juris SQL database:

1. Verify that all users have closed out of Juris.
2. Click the Windows **Start** button.
3. Select **Start** > **Programs** or **All Programs** in Windows 7.
4. Select **Juris** > **Administrative Tools** > **Juris Management Console** to open the console.



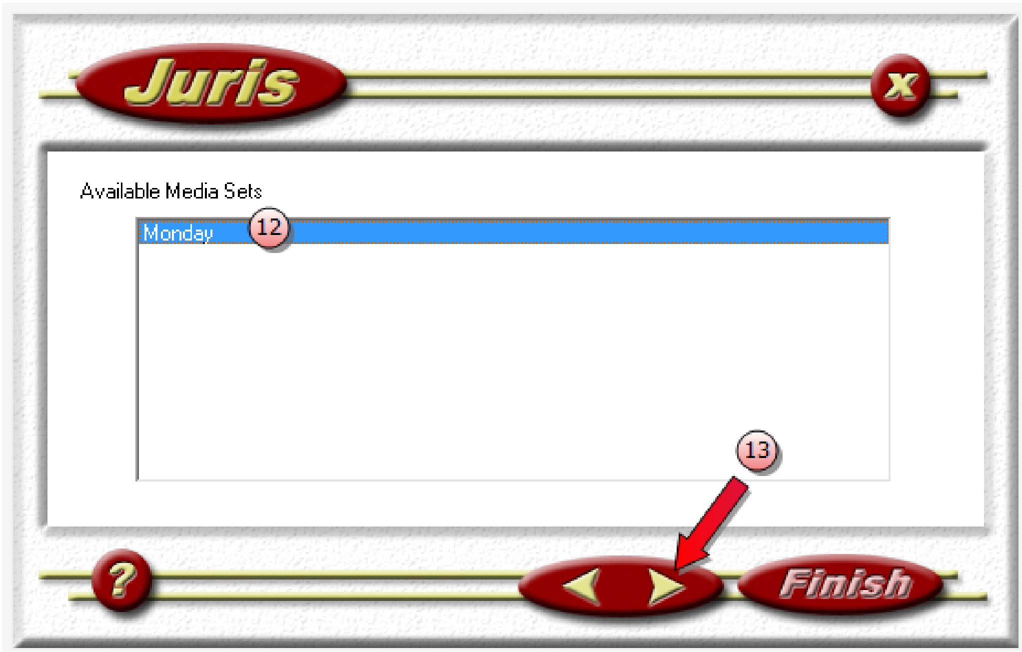
5. Double-click **Juris Management Console** to expand the folder.
6. Double-click **[your firm's name]** to expand the folder.
7. Double-click **Database** to display the Database Utilities in the pane on the right.
8. Click **Restore** in the right pane to open the Juris Restore wizard.

9. Click the right arrow button to display the Available Devices information.

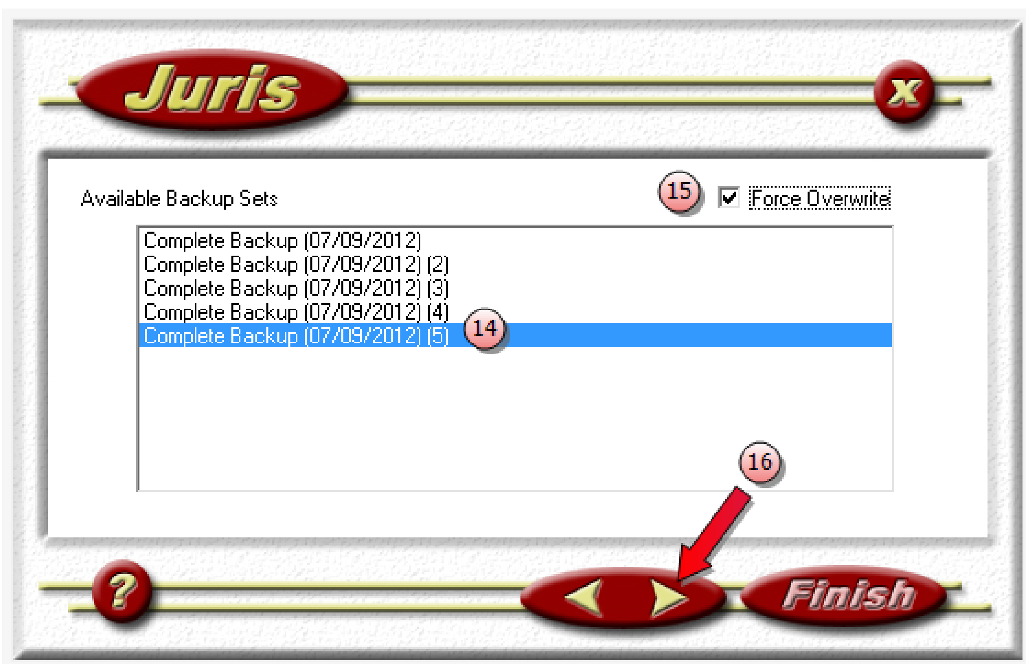


10. Click the backup device you want to restore from to select it.

11. Click the right arrow button to display the Available Media Sets information.

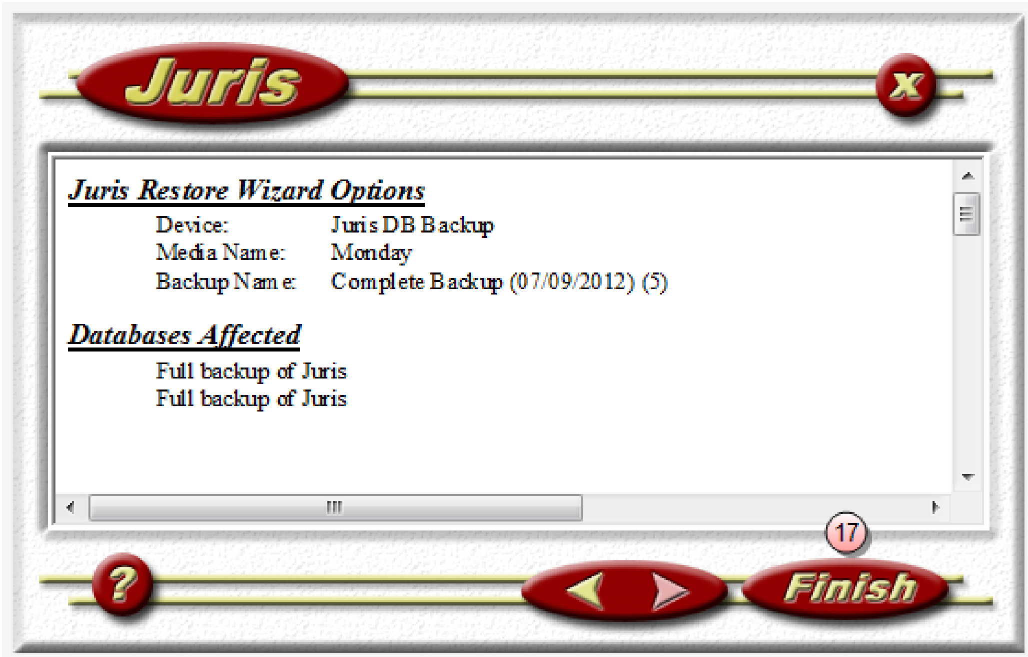


12. Click the media set you want to restore from to select it.
13. Click the right arrow button to display the Available Backup Sets information.



14. Click the backup set you want to restore to select it.
15. Select the **Force Overwrite** check box, if you want to overwrite the current Juris data.

16. Click the right arrow button to display the restore confirmation listing.



17. Click the **Finish** button to start the restore.

    When the restore is finished, you receive notification via a report in the Juris Management Objects window.

18. Click the **X** button to close the Juris Management Objects window.

Security

Enable or disable firewall for Windows 7

1. Open the **Control Panel**. (Access to the Control Panel may vary depending on how your preferences are set up.)
2. Click **System and Security**.
3. Click **Windows Firewall**.
4. Click **Turn Windows Firewall on or off** to open the Customize settings for each type of network screen.
5. Select **Turn on Windows Firewall** or **Turn off Windows Firewall**.
6. Click **Ok** to close the Customize settings for each type of network window.

Enable or disable firewall for Windows 8

1. Open the **Control Panel** by pointing to the upper or lower right corner of the screen or by swiping in from the right edge of the screen, on a touch screen computer. (Please note that access to the Control Panel may vary depending on how your preferences are set up.)
2. Click (or tap) on the **Search** icon.
3. Type (or tap) the word **firewall** into the Search box.
4. Click **Windows Firewall**.
5. Click (or tap) **Turn on Windows Firewall** under each type of network that you want to protect, or click (or tap) **Turn off Windows Firewall** under each network on which you want to remove firewall protection.
6. Click **Ok** to close the Customize settings for each type of network window.

> **NOTE:** If your PC is connected to a network, network policy settings might prevent you from completing these steps. For more info, contact your administrator.

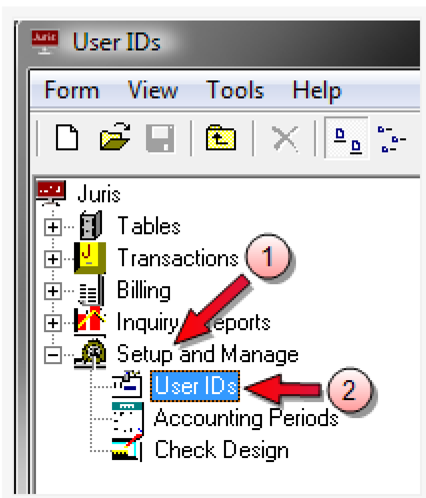
Configure firm and users

Create a User ID (account)

The User IDs function allows you, as an administrator to define which areas of Juris each user should be allowed to access, as well as which reports should be available on the user's menu. The user rights may also be limited to prevent particular users from performing functions outside of the current accounting period. The options on the Web Rights tab determine the user rights available in Juris for Time Matters ® (only for firms who have the benefit of Time Matters).

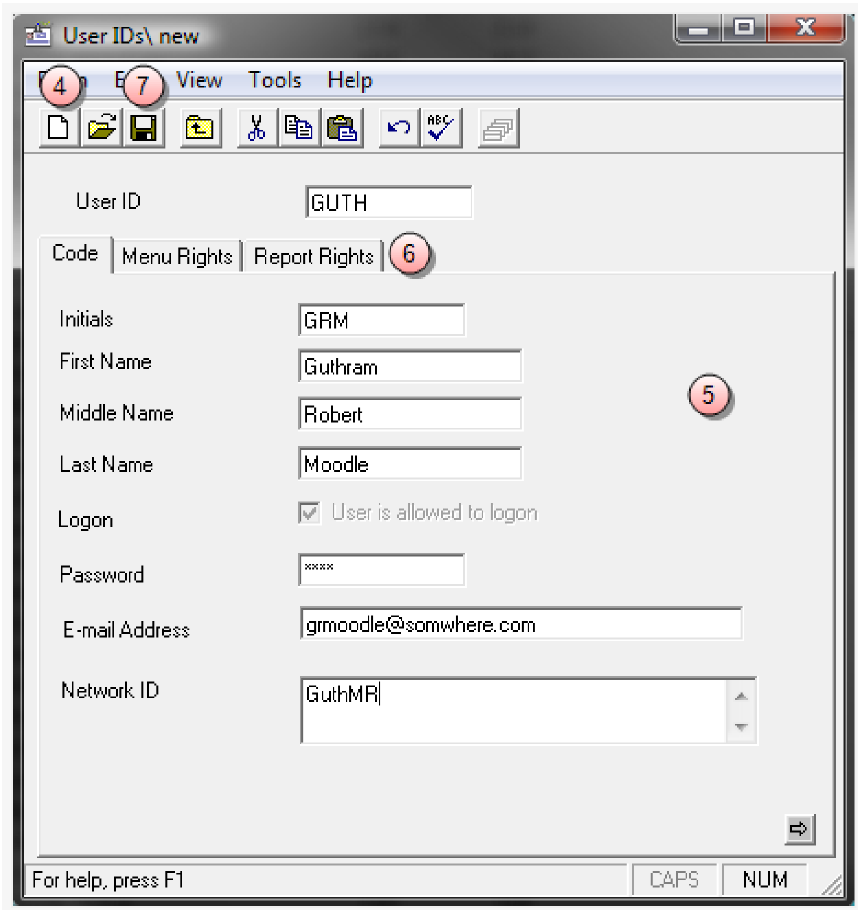
To create a user ID:

1. Double-click **Setup and Manage**.



2. Double-click **User IDs**.
3. Select **Form** > **New** > **User ID** from the menu.

   The User IDs\new window opens.

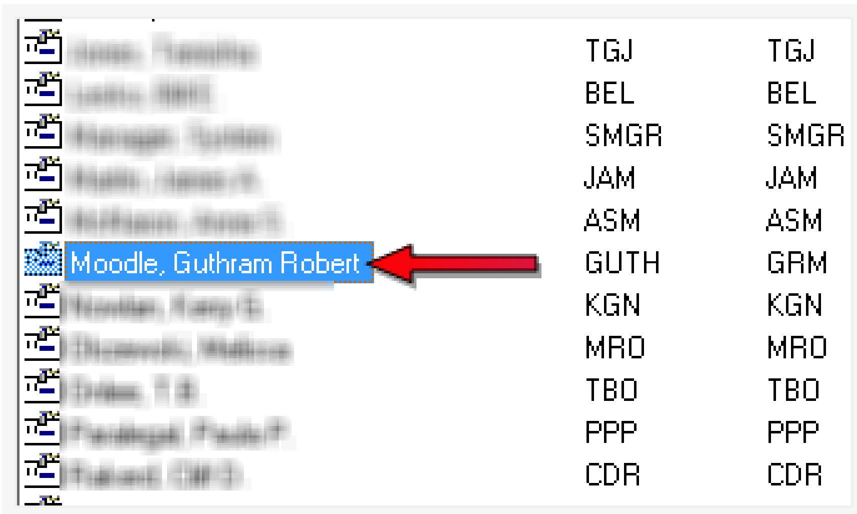


4. Click the **New** icon on the toolbar to open a New ID or double-click to open an existing User ID.
5. Enter the appropriate information for the user. For details, review User ID's Advanced Topics.
6. Review the **Menu Rights**, **Report Rights** and **Web Rights** tabs and make selections as appropriate. For details, review **User ID's** Advanced Topics.

> **NOTE:** For New User ID's - all tabs MUST be reviewed before the system will allow the User ID to be saved. After the save is complete, the system will allow all permissions to be copied from an existing ID. For details, review User ID's Advanced Topics.

7. Click the **Save** button on the toolbar to save the new user ID.

8. The new entry is displayed in the list in alphabetical order, as shown in the example below.



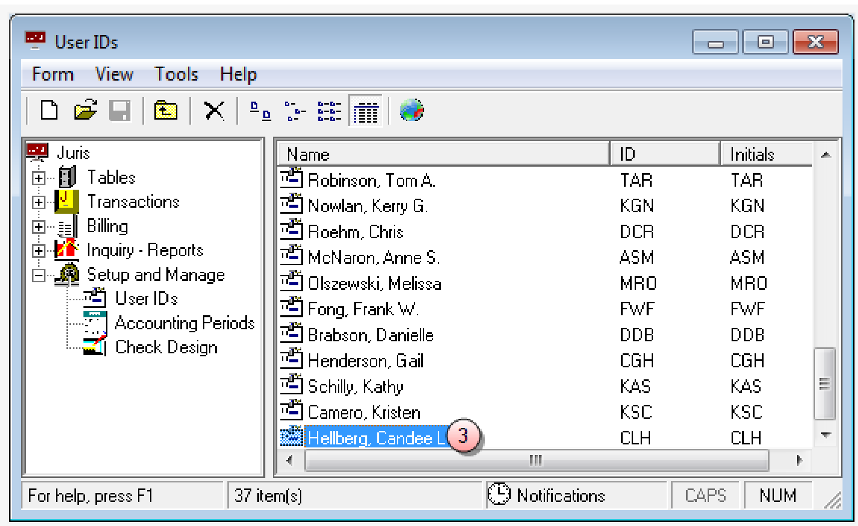
Mobile access

> **NOTE:** Remember to click the **Save** button to commit the changes.

Enable Mobile Web Access for a user

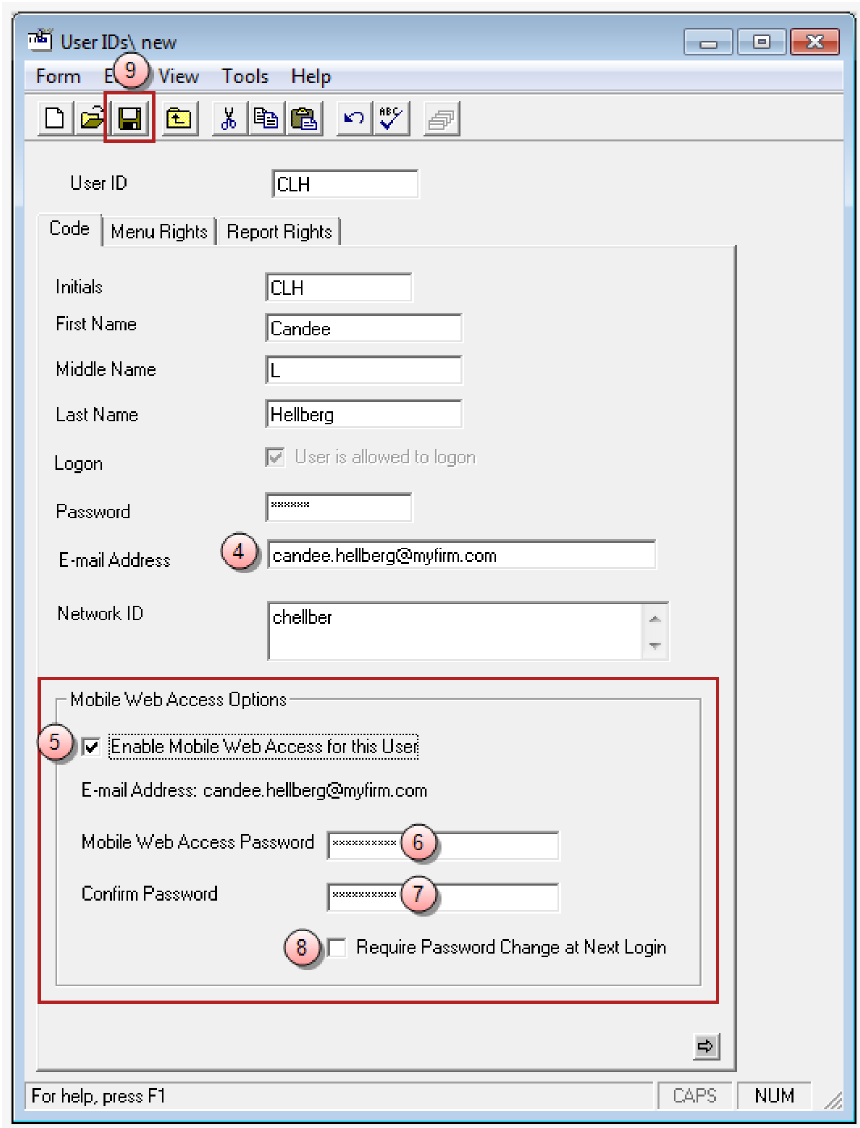
To enable a user's Mobile Web Access:

1. Select **Setup and Manage**.
2. Double-click **User IDs** to display a list of users in the right pane.



3. Double-click on the user for whom you want to set Mobile Web Access capabilities.

   The User IDs\[user ID] window opens.



4. In the **E-mail Address** box, ensure that a valid email address is entered. If not, enter the email address.
5. Click the **Enable Mobile Web Access for this User** check box to check (select) it.

   A check mark indicates that you want to turn on Mobile Web Access for this user.
6. In the **Mobile Web Access Password** box, type in a password for this user following the Mobile Web Access Password Rules found below.
7. In the **Confirm Password** box, re-type the same password as in step 6.

8. Optionally, click the **Require Password Change at Next Login**, if you want to require that the user changes their Mobile Access Password the next time they log into Juris.

   A check indicates that you want to require that the user change this password on their next login.

9. Click the **Save** button.

   The user now has Mobile Web Access capabilities.

Mobile Web Access Password Rules

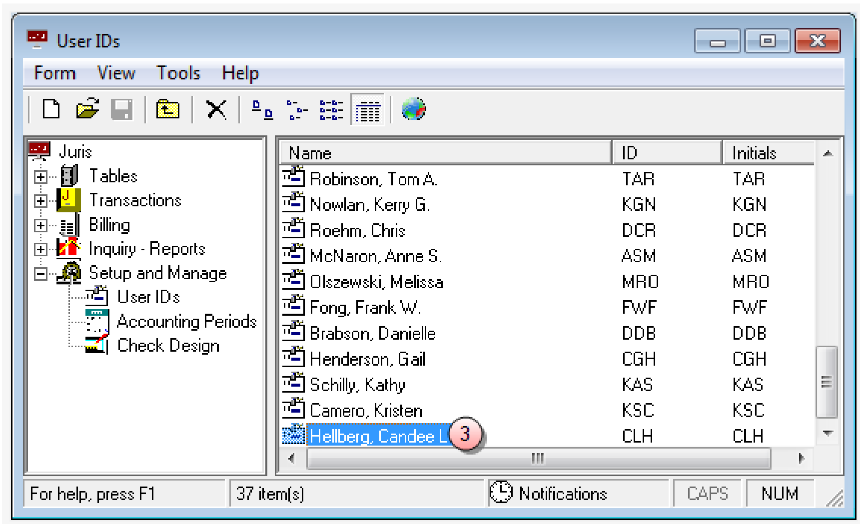
Below are the set of rules to follow when changing your Mobile Web Access password.

- Your password must be between 8 and 16 characters long.
- Your password must contain characters from 3 of the 4 following categories:
  - Include one or more uppercase characters (A-Z)
  - Include one or more lowercase characters (a-z)
  - Include one or more numbers (0 -9)
  - Include one or more of the following characters: ! @ # $ % ^ & * ( ) ~ _ - + = { [ ] } | \ : ; " ' < , > . ? /
- Your password must not contain any spaces.
- Your password must not contain your User ID.
- Your password cannot be the same as any of your previous five passwords.

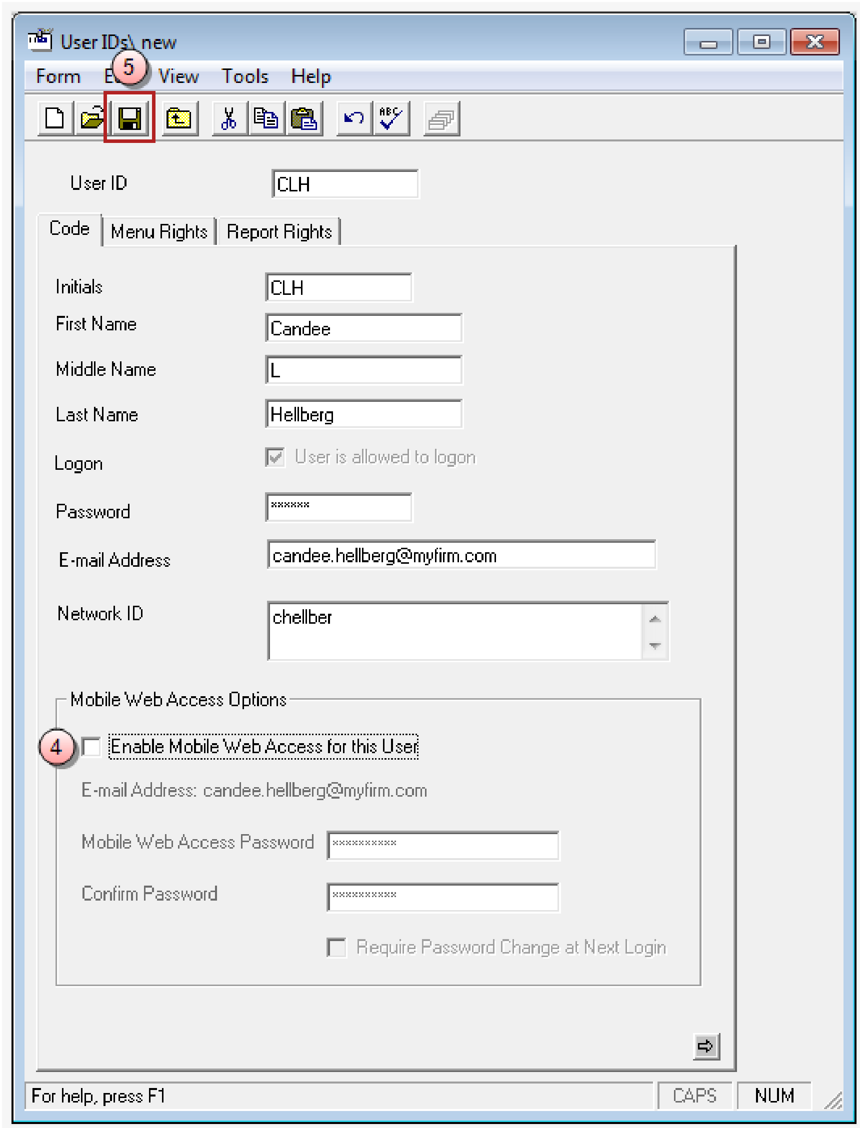
Disable Mobile Web Access for a user

To disable a user's Mobile Web Access:

1. Select **Setup and Manage**.
2. Double-click **User IDs** to display a list of users in the right pane.



3. Double-click the user name to open the User IDs\[user ID] window.



4. Click the **Enable Mobile Web Access for this User** check box to un-check (deselect) it.

   A blank check box indicates that you want to turn off Mobile Web Access for this user.

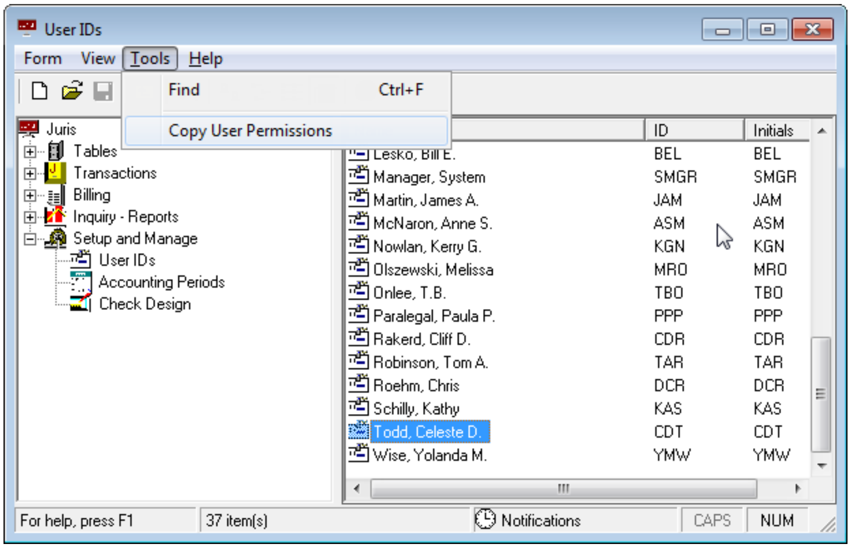
5. Click the **Save** button.

   The user's Mobile Web Access capabilities are now removed.

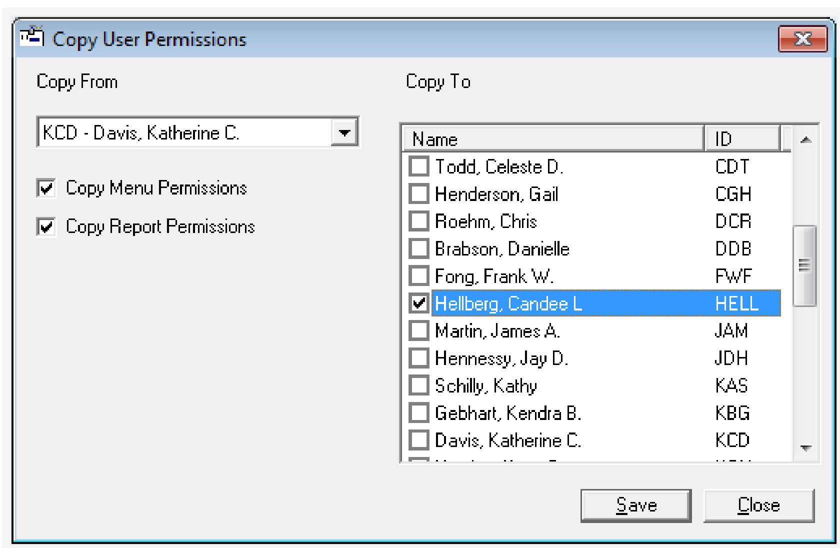
Copy User Permissions

The permissions granted to one user may be copied to one or more other users.

1. Select **Tools** > **Copy User Permissions** from the User IDs window.



This action opens the Copy User Permissions window.



2. In the **Copy From** drop-down list, select the timekeeper whose permissions should be copied to other users.

3. Place a check mark in the types of permissions that should be copied. **Menu Permissions**, **Report Permissions**, **Web Permissions** or any combination of these may be copied.

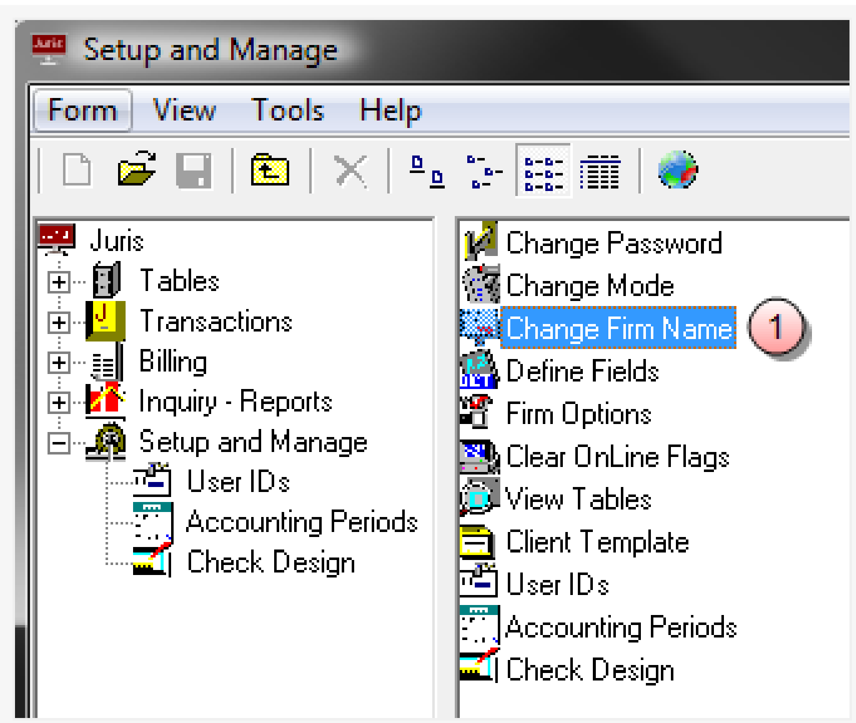
4. Place a check mark beside the name of the user or users that should have these permissions.
5. Once all users have been selected, click the **Save** button.

Change firm name

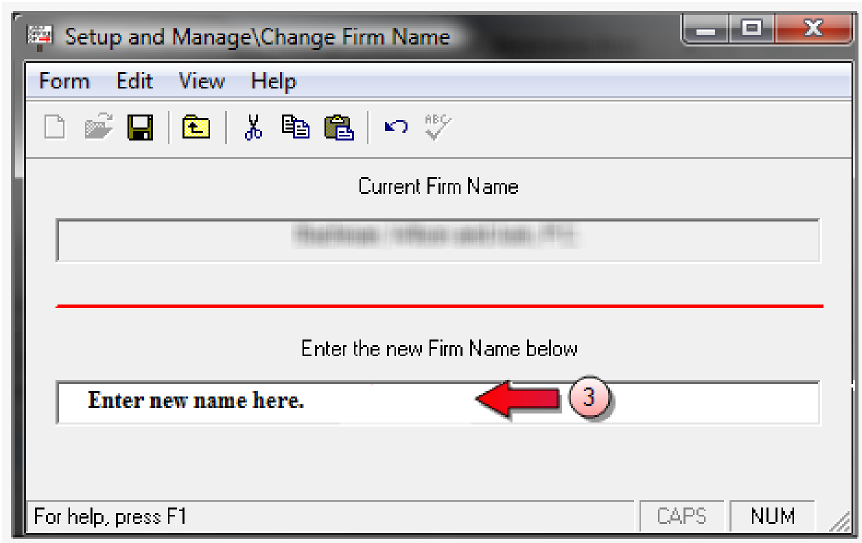
The Change Firm Name option lets you enter your firm name into the Juris system. The Firm Name is used on reports and may be up to 60 characters in length.

> **NOTE:** Juris must be in Maintenance Mode before you can change the firm name or select the Change Firm Name option.

1. Place Juris in Maintenance Mode.
2. Select **Setup and Manage** > **Change Firm Name**.



3. Enter the firm name in the space provided (up to 60 characters).



4. Return Juris to Normal Mode.

Mobile Web Access tab

The Mobile Web Access feature in Firm Options lets you enable or disable mobile web access for your users. Mobile web access provides your users with the ability to

There is a separate section in the User IDs window where your users can enable Mobile Web Access for themselves, providing you have enabled access in your Firm Options.

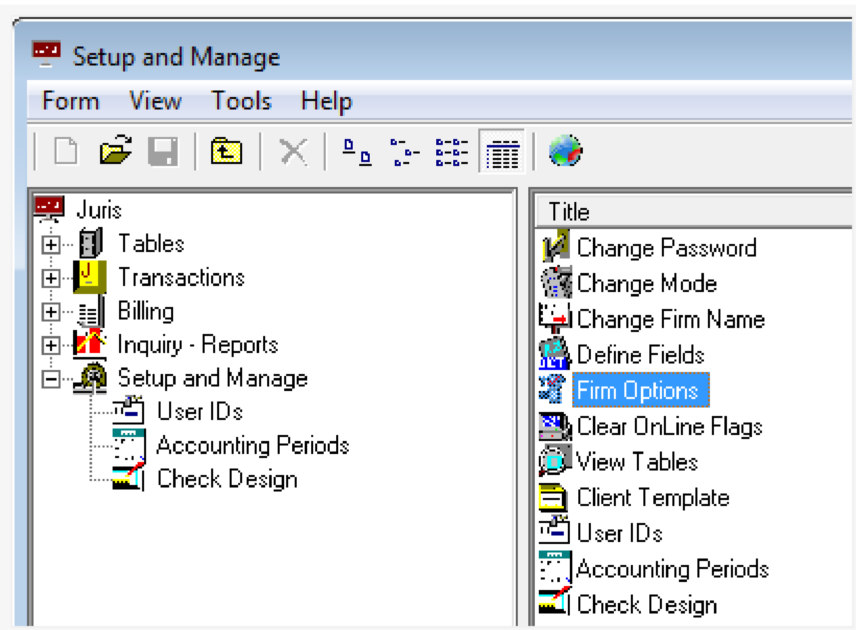
Enable Mobile Web Access

To allow mobile web access for your users:

1. Place Juris in **Maintenance** mode.

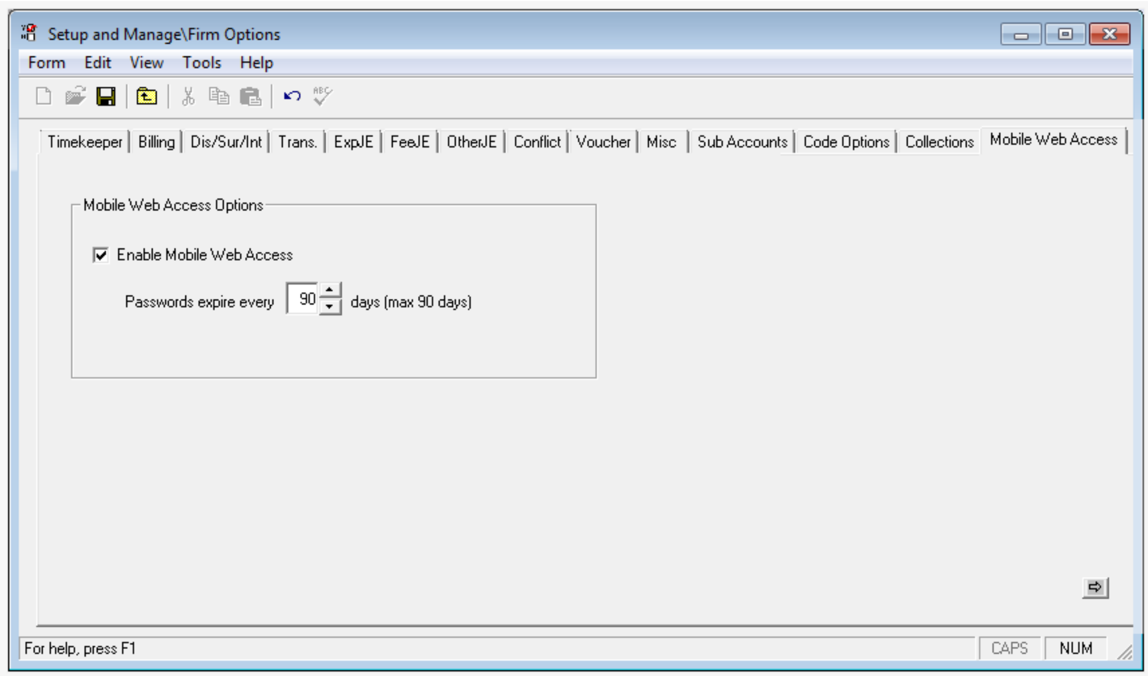
> **NOTE:** The Firm Options feature is not available unless Juris has been placed into maintenance mode.

2. Select **Setup and Manage**.



3. Double-click on **Firm Options**.

   The Setup and Manage\Firm Options window opens.



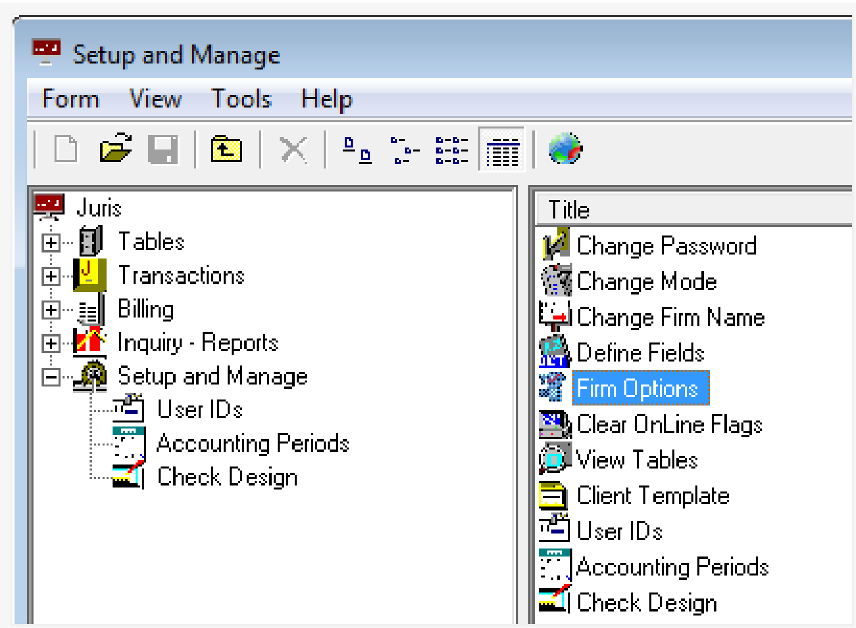
4. Click on the **Mobile Web Access** tab to open it.
5. Click on the **Enable Mobile Web Access** check box to check it.

   This enables mobile web access for your users.
6. In the **Passwords expire every __ days (max 90 days)** box, type the number of days passwords can be active before requiring it to be changed. You can also use the up and down arrow buttons to set the days.
7. Select **Form** > **Save** from the menu (or click the **Save** icon) to save your settings.
8. Click the window **Close** button to close the window, if you are finished setting/changing firm options.
9. Place Juris back into Normal mode.

Disable Mobile Web Access

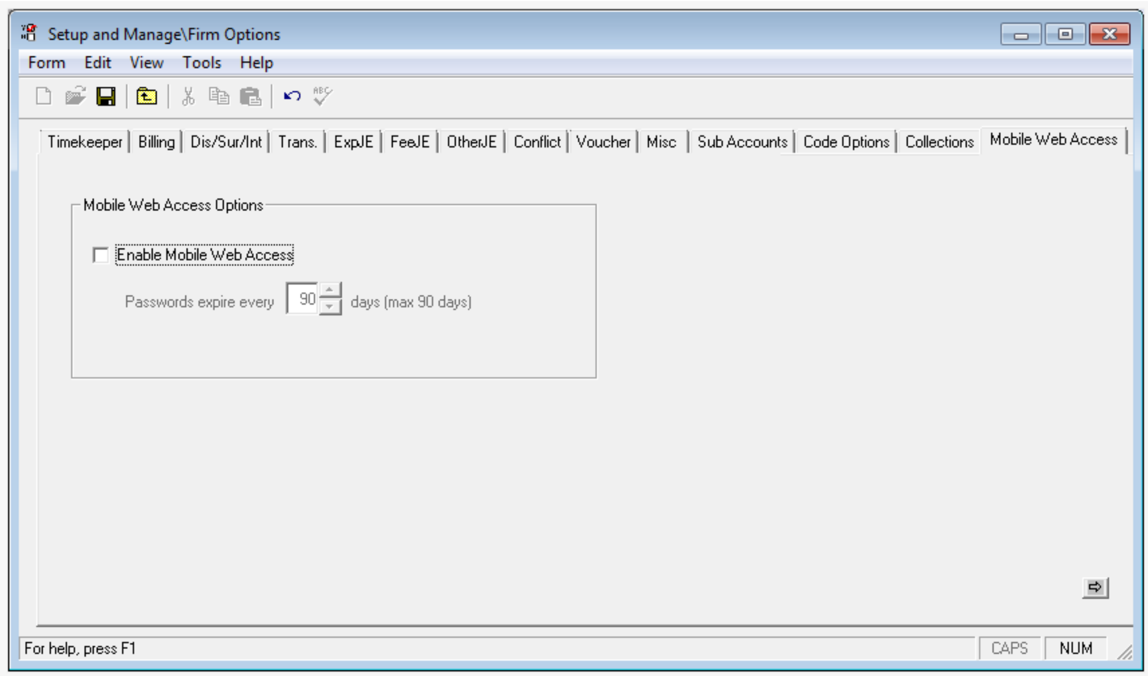
To prevent your users from using mobile web access:

1. Place Juris in **Maintenance** mode.
2. Select **Setup and Manage**.



3. Double-click on **Firm Options**.

   The Setup and Manage\Firm Options window opens.



4. Click on the **Mobile Web Access** tab to open it.
5. Click on the **Enable Mobile Web Access** check box to remove the check mark.

   This disables mobile web access for your users.
6. Select **Form** > **Save** from the menu (or click the **Save** icon) to save your settings.
7. Click the window **Close** button to close the window, if you are finished setting/changing firm options.
8. Place Juris back into **Normal** mode.

Software licenses and updates

Open the Juris License Manager

1. Click **Start** > **Programs** > **Juris** > **License Manager**.

   The License Manager window displays.

2. Select applicable options:

   - **Licensed Instances of Juris** – Displays a list of the licenses that are available in Juris.
   - **Code** – Contains the client/company code of the license.
   - **Description** – Contains the name of the company, typically the firm name.
   - **Shared Path** – Location of the shared files
   - **Active Server** – Name of the computer that hosts the Juris database.
   - **Juris Default** – A check indicates that the company is the default when logging into Juris or Juris utilities.
   - **Outlook Default** – A check indicates that the company is the default when using Juris Expanded features or Outlook.
   - **Remove** – Removes an item from the Licensed Instances of Juris list.
   - **Add** – Adds an item to the Licensed Instances of the Juris list.
   - **Save** – Saves any changes made to the licenses.
   - **Cancel** – Allows you to close without saving the changes. Previously saved changes will be retained.

Download Juris and Juris Suite updates

The following instructions helpful when downloading updates:

1. Contact Customer Support at 877-377-3740 to obtain a product key. This is required for software update installation.

2. Navigate to the following website:

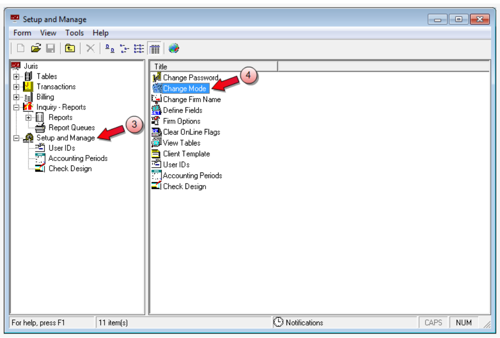
   https://lexisnexis.custhelp.com/app/answers/answer_view/a_id/1096425/
3. Select the appropriate download file (Juris or Juris Suite).
4. Click to download the appropriate file, as directed by customer support.
5. Enter your contact name, email address, Product ID/Client ID, and security verification code on the **LexisNexis Software Downloads & Patches** page.
6. Click **Submit** to open the LexisNexis Software License Agreement page.
7. Click **Agree** to accept the license agreement.
8. Click **Save** to save the file to your Windows Desktop.
9. Right-click the download file and select **Extract Here** to extract the file to your Windows Desktop.
10. Call LexisNexis support if the user needs assistance.

Verify system status and access

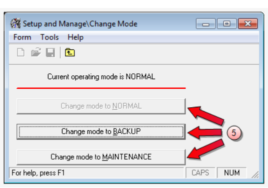
Change Juris mode

To change the system status to backup, maintenance, or normal:

1. Verify that all users have closed Juris.
2. Start **Juris** and log in to open the main Juris window.



3. Double-click **Setup and Manage** to expand the folder.
4. Double-click **Change Mode** in the right pane to open the Setup and Manage\Change Mode window.



5. Click the mode button that corresponds with what you want to do:
   - **Change mode to NORMAL** - places Juris in "normal" mode, which allows Juris access to all users.
   - **Change mode to BACKUP** - places Juris in backup mode, which denies Juris access to all users except the system manager, so that backups can be performed.

- **Change mode to MAINTENANCE** - place Juris in maintenance mode, denies Juris access to all users except the system manager, so that software upgrades and maintenance can be performed.

Juris is automatically placed in the mode you have selected, and the Setup and Manage\Change Mode window closes.

> **NOTE:** Remember to place the system back into "normal" mode after you a finished doing maintenance or a backup.

Change Mode overview

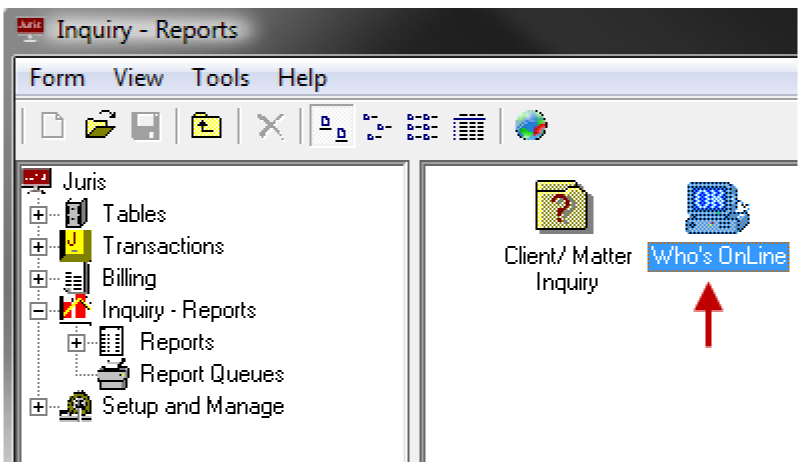
The Change Mode function can be used to lock down certain maintenance areas of Juris while the product is in use by your firm’s staff (Normal Mode) and is also used to lock out users while maintenance functions or backups are being performed (Maintenance Mode and Backup Mode).

Run a Who's Online Inquiry

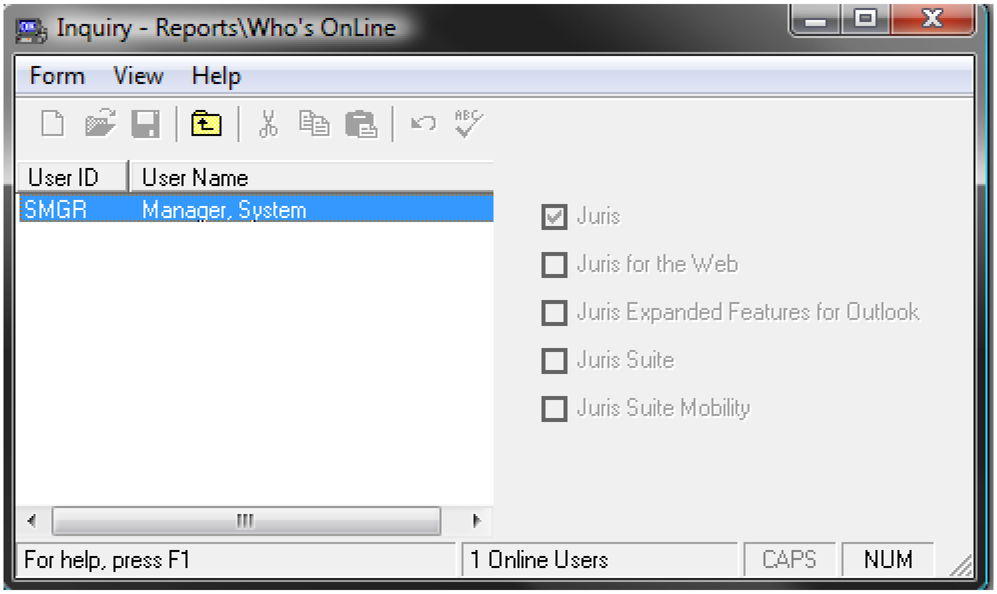
When you want to see who is logged into Juris, you run the "Who's Online" inquiry.

To run a Who's Online inquiry:

1. Select **Inquiry-Reports** > **Who's Online**.



The Inquiry - Report\Who's Online window opens.



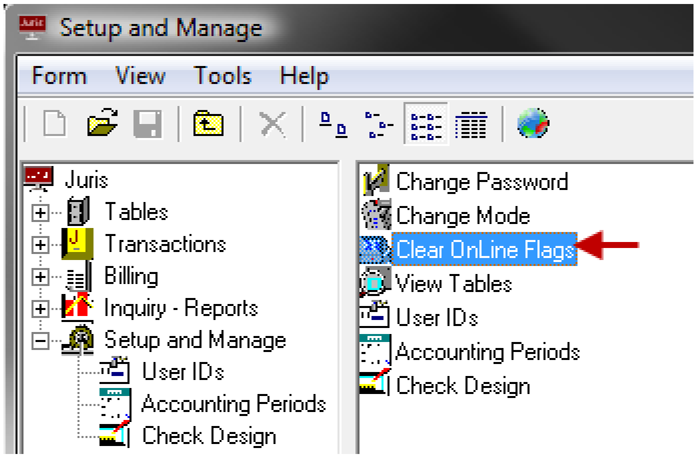
2. On the left side of the screen is a list of the users that are currently online (listed by User ID, User Name).
3. Select a **user** by clicking on their line, or use the arrow keys to move the pointer to a particular user.

   Once a user is selected, the system shows if that user is active in Juris, Juris Suite, by showing a check mark beside the appropriate item(s).

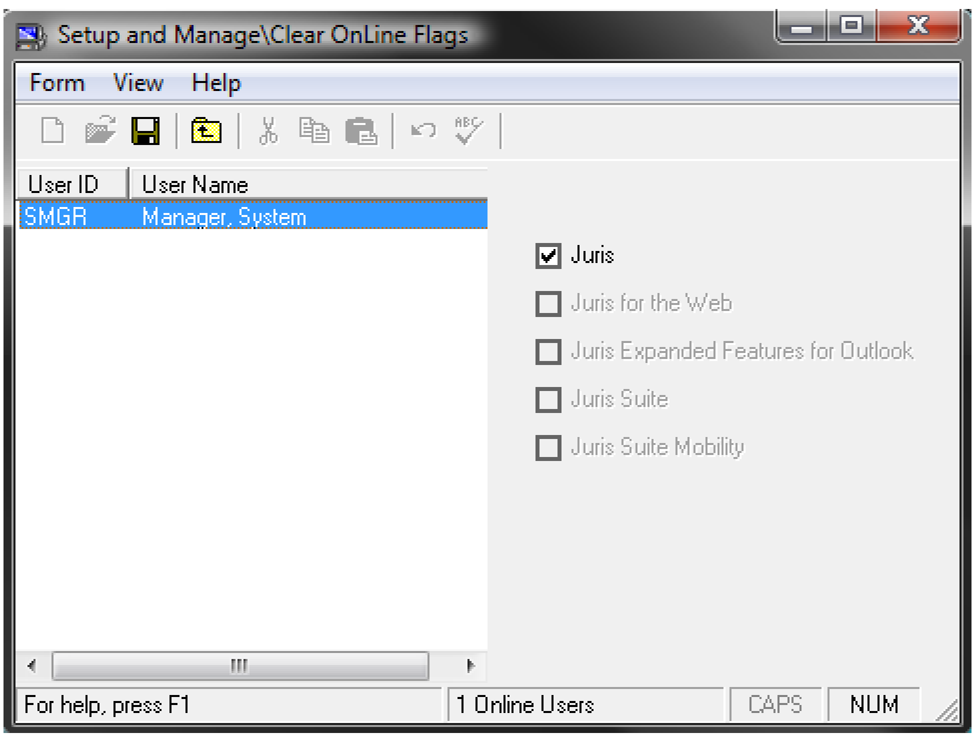
Clear Online Flags

The Clear Online Flags function is used to unlock a user's work session that may have been locked due to an improper exit or ejection from the application.

1. Select **Setup and Manage** > **Clear Online Flags**.



2. Review the list of users currently in the system. Select the user who needs to be unlocked.



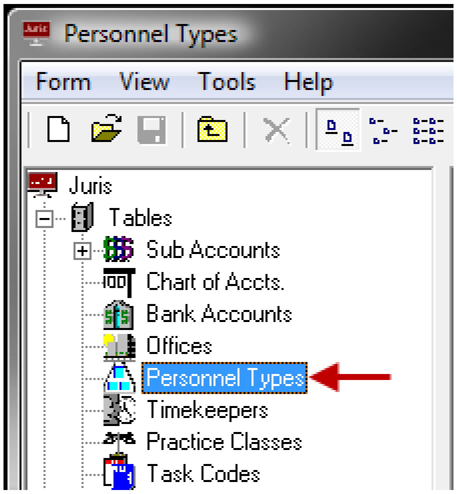
3. Remove the check mark(s) beside the application(s) they are locked out of (Juris, Juris for the Web, Expanded Features for Outlook).

4. Click the **Save** icon on the toolbar. Note that you can also select **Form** > **Save** from the menu or press **Ctrl** + **S** on your keyboard.

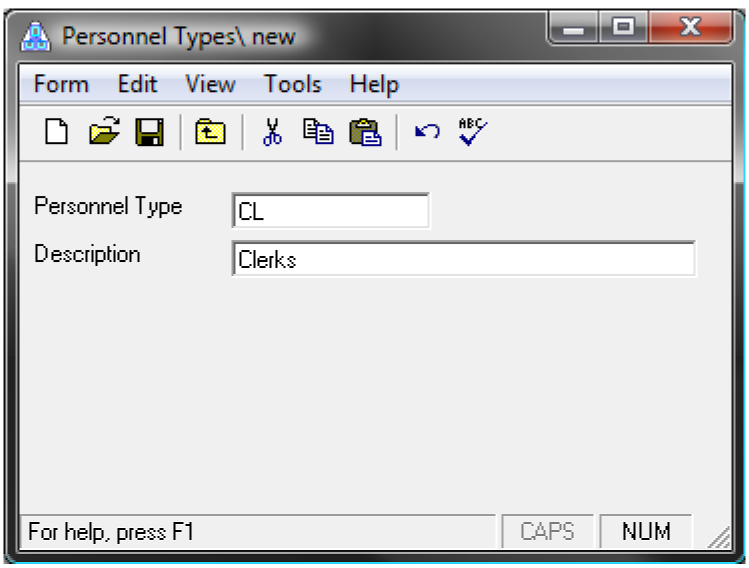
Create a Personnel Type

To set up a Personnel Type:

1. Select **Tables** > **Personnel Types**.



2. Click the **New** icon on the toolbar to open a new **Personnel Type** form. Note that you can also select **Form** > **New** from the menu, or press **Ctrl** + **N** on your keyboard.



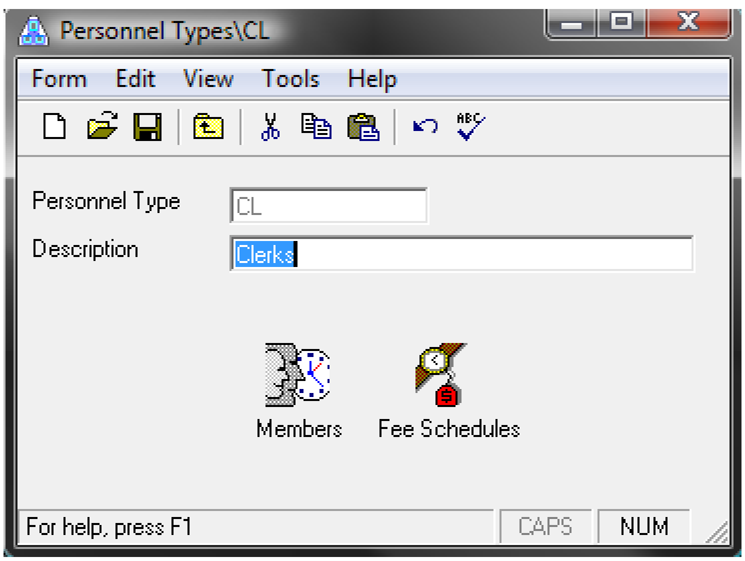
3. In the **Personnel Type** text box, type a 1-2 character code.

   The code can be digits, alpha characters, or a combination of both.

4. Ensure that the Personnel Type Code used, defines the rank so that sorting by rank places the items in the correct hierarchical order, if there is a need to sort Timekeepers by rank (typically used on bill formats),

   Example: 10 - Senior Partner; 20 - Junior Partner; 30 - Paralegal; 40 - Legal Assistant; 50 - Other Staff. Also notice that the codes used here skip numbers to allow for the insertion of additional codes in between the hierarchies at a later date, if needed.

5. In the **Description** text box, type a 1 - 30 character alphanumeric description.
6. Click the **Spell Check** icon on the toolbar to spell-check the form. Note that you can also select **Form** > **Spelling** from the menu, or press **F7** on your keyboard.
7. Click the **Save** icon on the toolbar to save the Personnel Type. Note that you can also select **Form** > **Save** from the menu, or press **Ctrl** + **S** on your keyboard.
8. Once saved, the Members and Fee Schedules icons appear.



9. Optionally, click the **Members** icon to add Timekeepers as 'Members' of the established Personnel Type.

   Type in the **Timekeeper ID** or use the **Lookup** to choose from a list of available Timekeepers.

10. Optionally, click the **Fee Schedules** icon to add the current personnel type to particular fee schedules.

Type in the **Fee Schedule Code** or use the **Lookup** to choose from a list of available Fee Schedules.

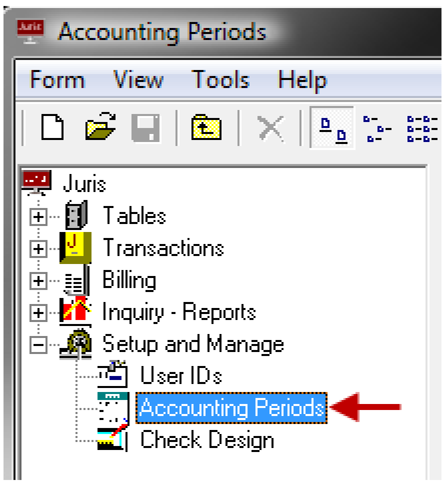
11. Click the **Spell Check** icon on the toolbar to spell-check the form. Note that you can also select **Form** > **Spelling** from the menu, or press **F7** on your keyboard.

Accounting settings

Create an Accounting Period

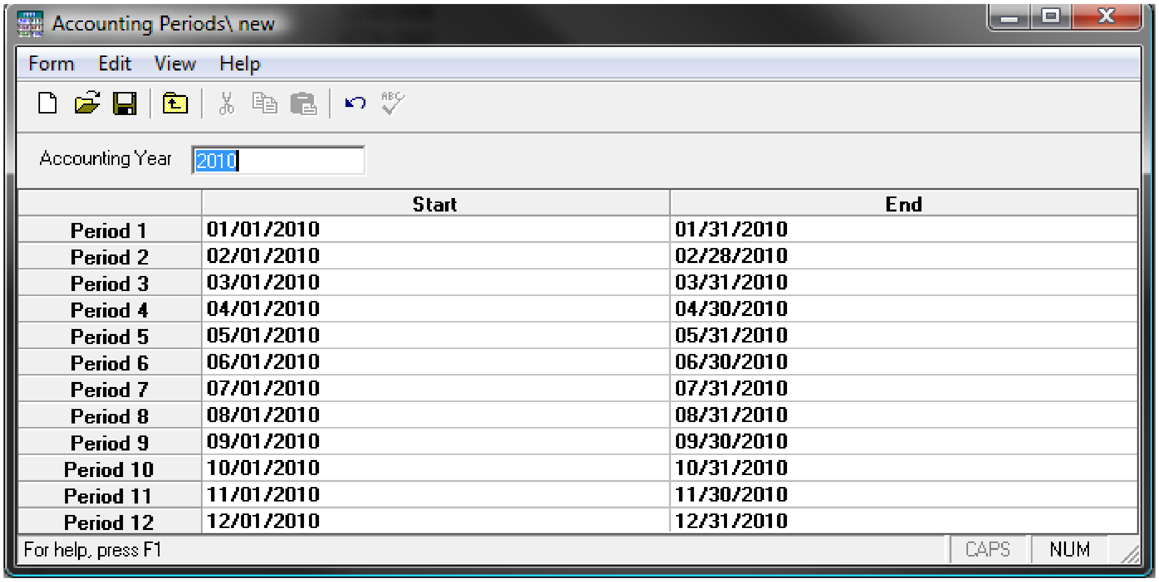
To create an accounting period:

1. Select **Setup and Manage** > **Accounting Periods**.



2. Click the **New** icon on the toolbar to open the **Accounting Periods** form. Note that you can also select **Form** > **New** > **Accounting Period** from the menu, or press **Ctrl** + **N** on your keyboard.

3. If this is the first accounting period entered, the year must be supplied, then the system will default the date range for each period based on the total number of accounting periods selected in Firm Options. If this is not the first accounting period entered, then the system will automatically fill in the year with the next accounting year. Again, the system will default the date range for each period based on the total number of accounting periods selected in 'Firm Options'.



4. Accept the defaults or make changes if desired.

> **NOTE:** The system requires that the entire calendar year be represented in the accounting period ranges before the accounting period may be saved.

5. Click the **Save** icon on the toolbar to save the **Accounting Period**. Note that you can also select **Form** > **Save** from the toolbar, or press **Ctrl** + **S** on your keyboard.

Set the current Accounting Period

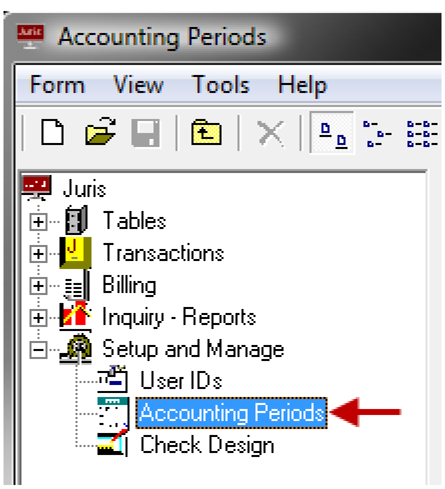
The Set Current Period function should be performed when it is time for users to begin entering transactions in a different period. The current period determines default date ranges throughout the system:

- Setting the current period will also prevent users from entering transactions in prior or future accounting periods, unless those users have rights to work outside the current period as assigned in User ID's > Menu Rights.
- If the firm selects to create transaction folders in Firm Options/Misc., the transaction folders will be based on the current period.
- In Select Prebills, the bill through date of prebills defaults to the end date of the current period.

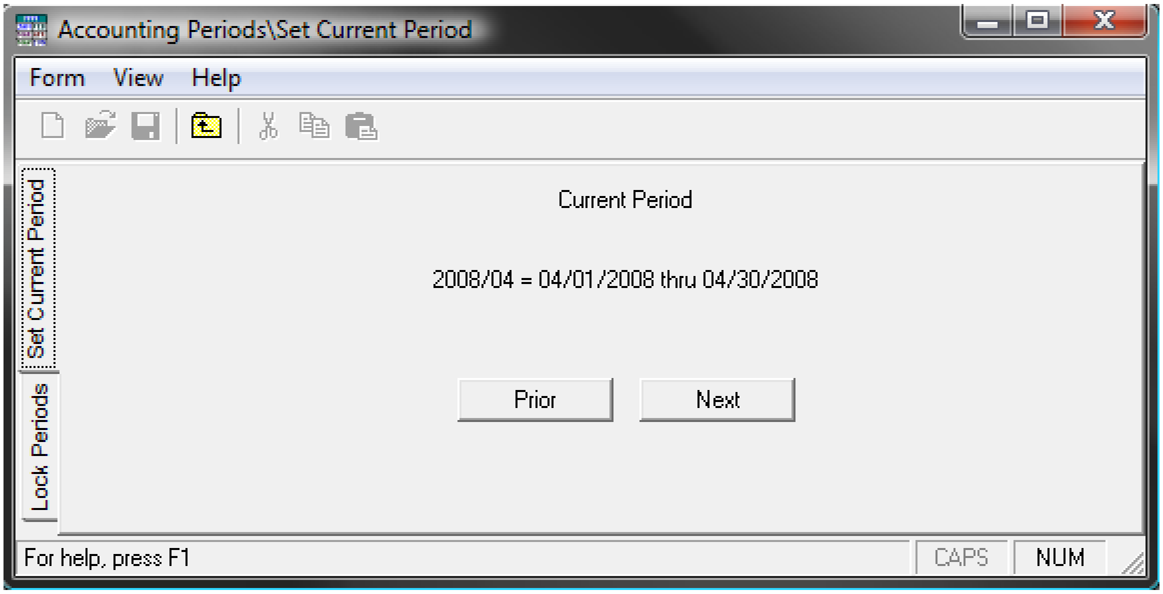
> **NOTE:** Before changing the current period, all users should exit the system and Juris should be placed in Maintenance Mode to prevent users from accidentally logging in while the Accounting Period is being changed.

To set the current accounting period:

1. Select **Setup and Manage** > **Accounting Periods**.



2. Select **Tools** > **Set Current Period** to open the Accounting Periods\Set Current Period screen.



3. Click the **Next** button to move to the next accounting period, click the **Prior** button to move to the previous accounting period.

> **NOTE:** Once an accounting year has been closed, the system will no longer allow the current period to be set to any period within that closed year.

4. Exit the **Accounting Periods** form, return **Juris** to **Normal Mode** and allow users back into the system.

Lock Accounting Periods and accounting years to activity

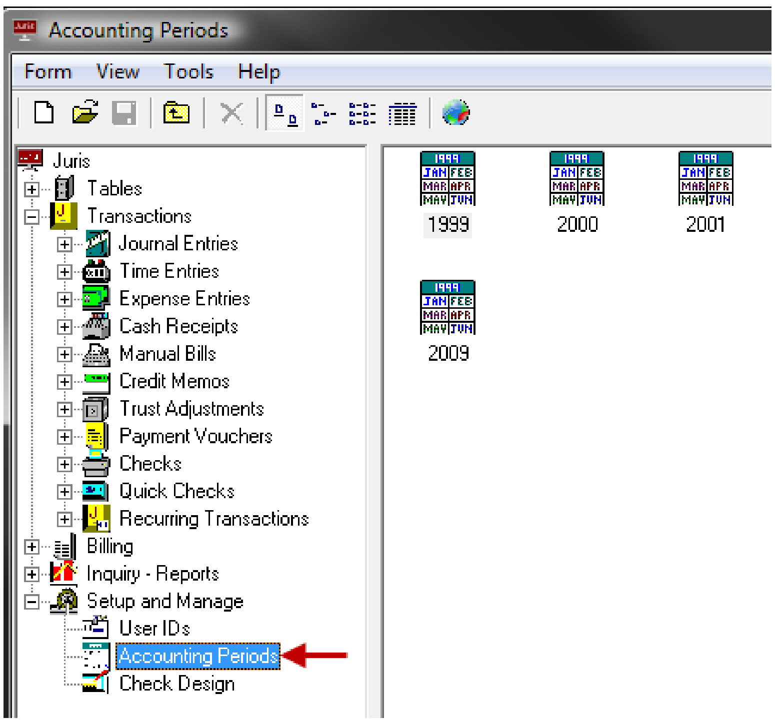
Juris allows you to lock accounting periods and accounting years to activity. This prevents users from posting transactions in those periods. It is recommended to lock certain periods and years after financial statements have been generated to prevent activity from being entered that would affect the information on those statements.

Juris does not allow certain items to be locked, such as:

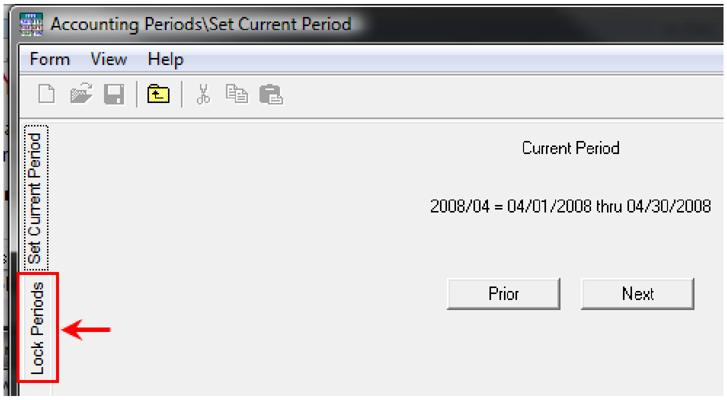
- The current period cannot be locked (use the **Go to Current Period** button to find which period is currently set as the current period.)
- Periods which contain unposted items cannot be locked.

To Lock/Unlock Accounting Periods and Accounting Years:

1. Select **Setup and Manage** > **Accounting** Periods.

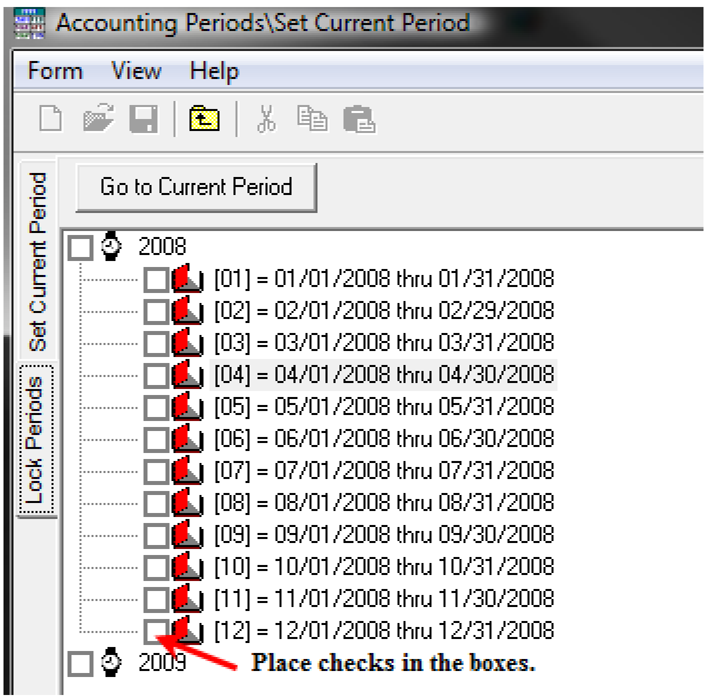


2. Select **Tools** > **Set Current Period** to open the Accounting Periods\Set Current Period screen.



3. Select the **LOCK PERIODS** tab.

   Accounting years and their associated accounting periods are listed.



4. Place a check mark beside an item to lock it, remove the check mark to unlock the item. Adding a check mark beside the YEAR to all periods within that year. Placing a check mark beside a period will lock that period.

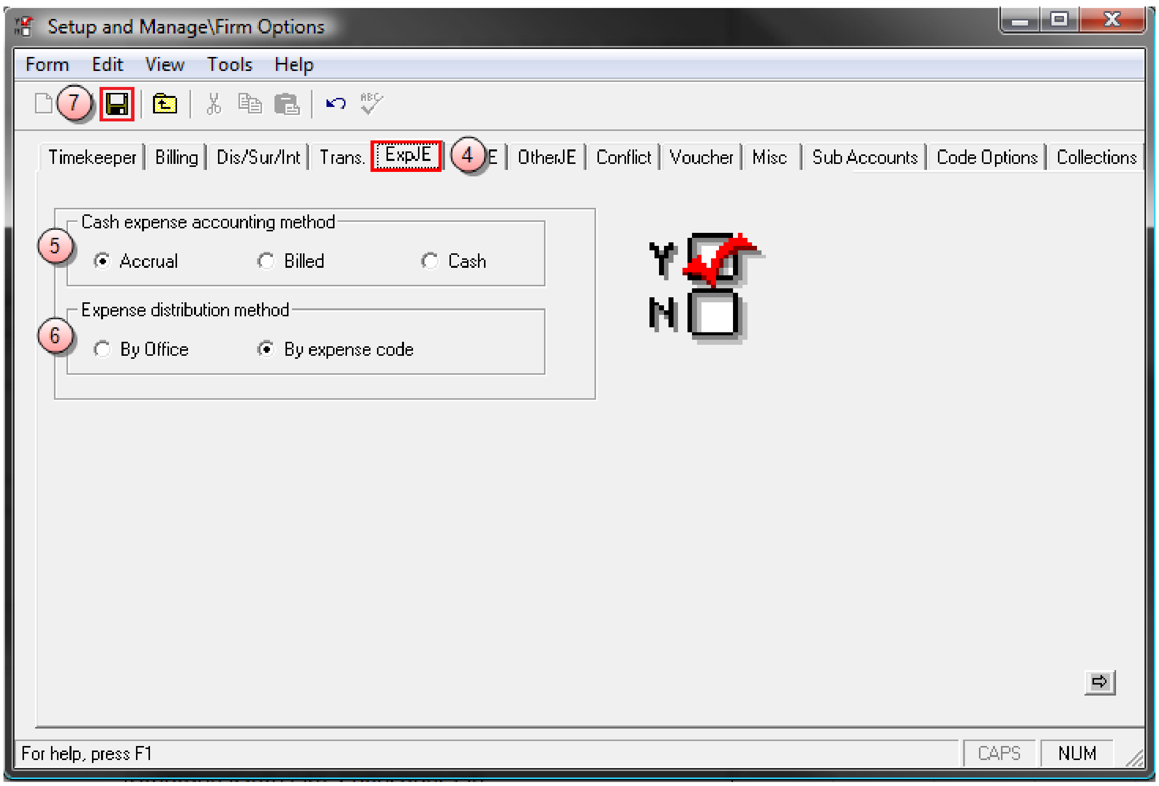
> **NOTE:** When a period is locked, all preceding periods will be automatically locked if they are not already locked.

5. Click the **Save** icon on the toolbar to save the to save the changes. Note that you can also select **Form** > **Save** from the toolbar, or press **Ctrl** + **S** on your keyboard.

Define expense accounting method

1. Verify that all users are logged out of Juris by running the Who's Online inquiry.
2. Place Juris in **Maintenance** mode.
3. Select **Setup and Manage** > **Firm Options**.

   The Setup and Manager\Firm Options window opens.
4. Click the **ExpJE** tab.
5. In the **Cash expense accounting method** box, click to select the appropriate option.

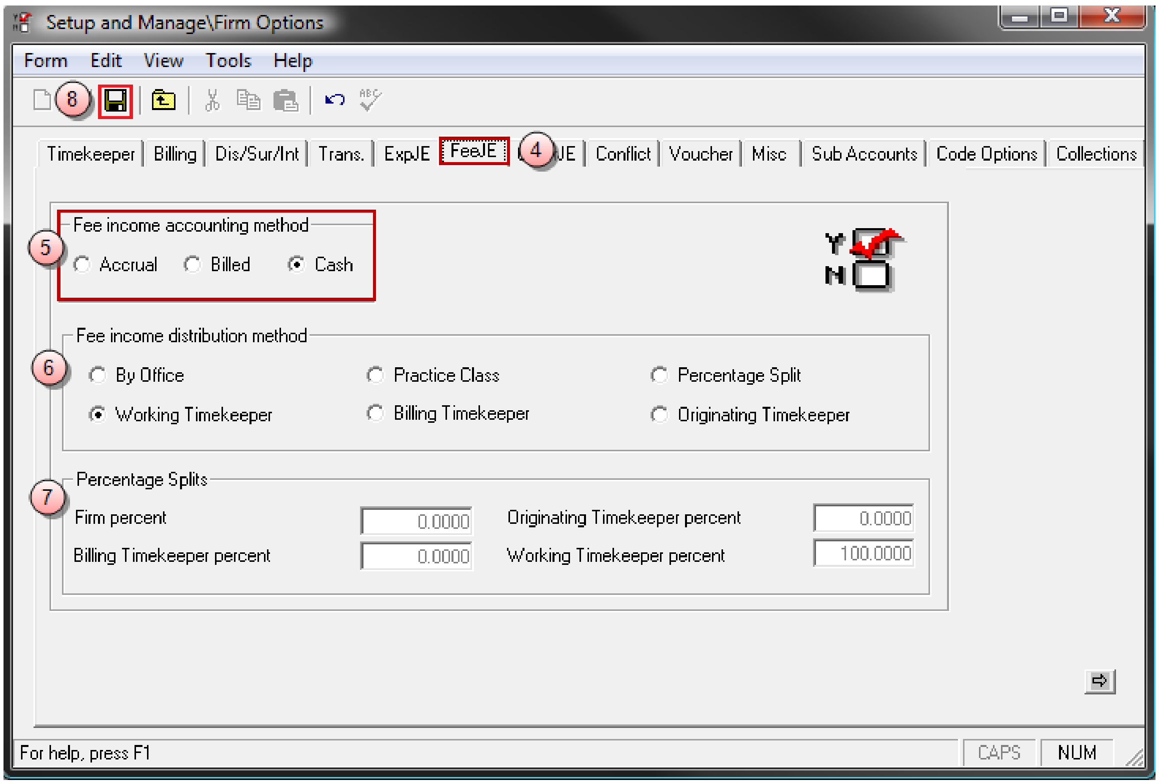


6. In the **Expense distribution method** box, click to select the appropriate option.
7. Click **Save** to save your changes. Note that you can also select **Form** > **Save** from the toolbar, or press **Ctrl** + **S** on your keyboard.
8. Place Juris back into **Normal** mode.

Define fee accounting method

1. Verify that all users are logged out of Juris by running the Who's Online inquiry.
2. Place Juris in **Maintenance** mode.
3. Select **Setup and Manage** > **Firm Options**.

   The Setup and Manager\Firm Options window opens.

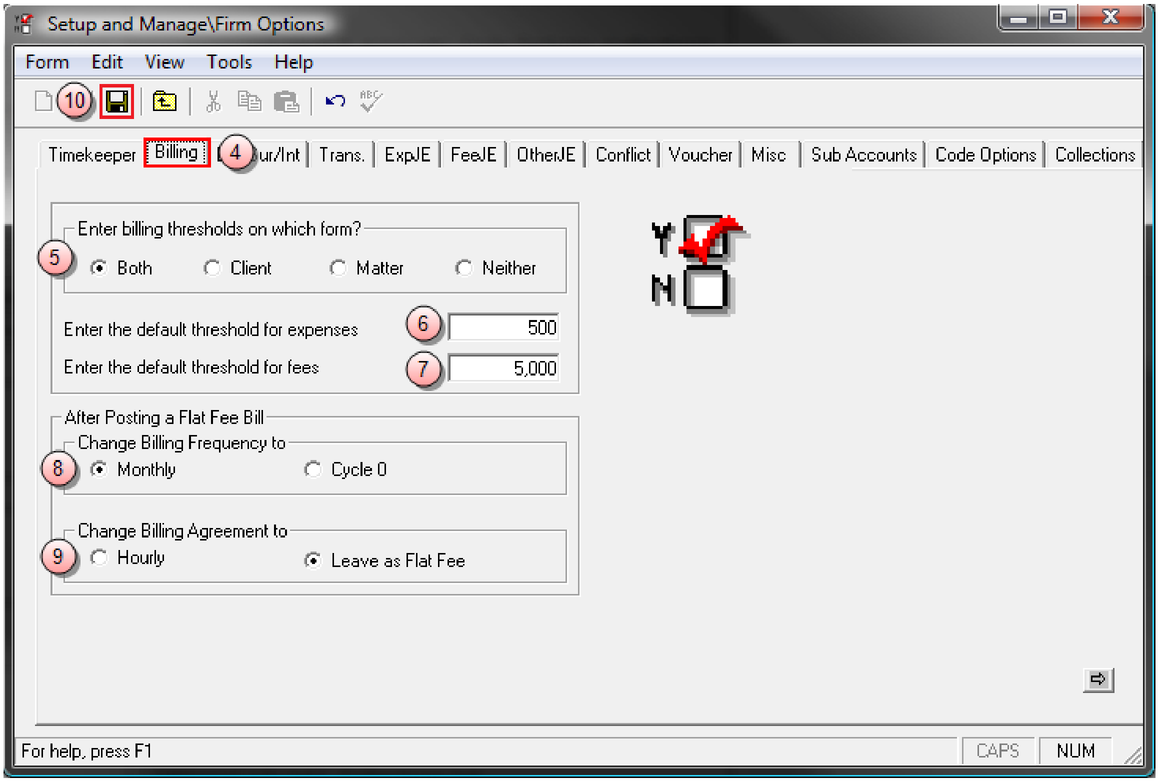


4. Click the **FeeJE** tab.
5. In the **Fee income accounting method** box, click to select the appropriate option.
6. In the **Fee income distribution method** box, click to select the appropriate option.
7. In the **Percentage Splits** boxes, type the appropriate percentages.
8. Click **Save** to save your changes. Note that you can also select **Form** > **Save** from the toolbar, or press **Ctrl** + **S** on your keyboard.
9. Place Juris back into **Normal** mode.

Set expense and fee thresholds

1. Verify that all users are logged out of Juris by running the Who's Online inquiry.
2. Place Juris in **Maintenance** mode.
3. Select **Setup and Manage** > **Firm Options**.

   The Setup and Manager\Firm Options window opens.



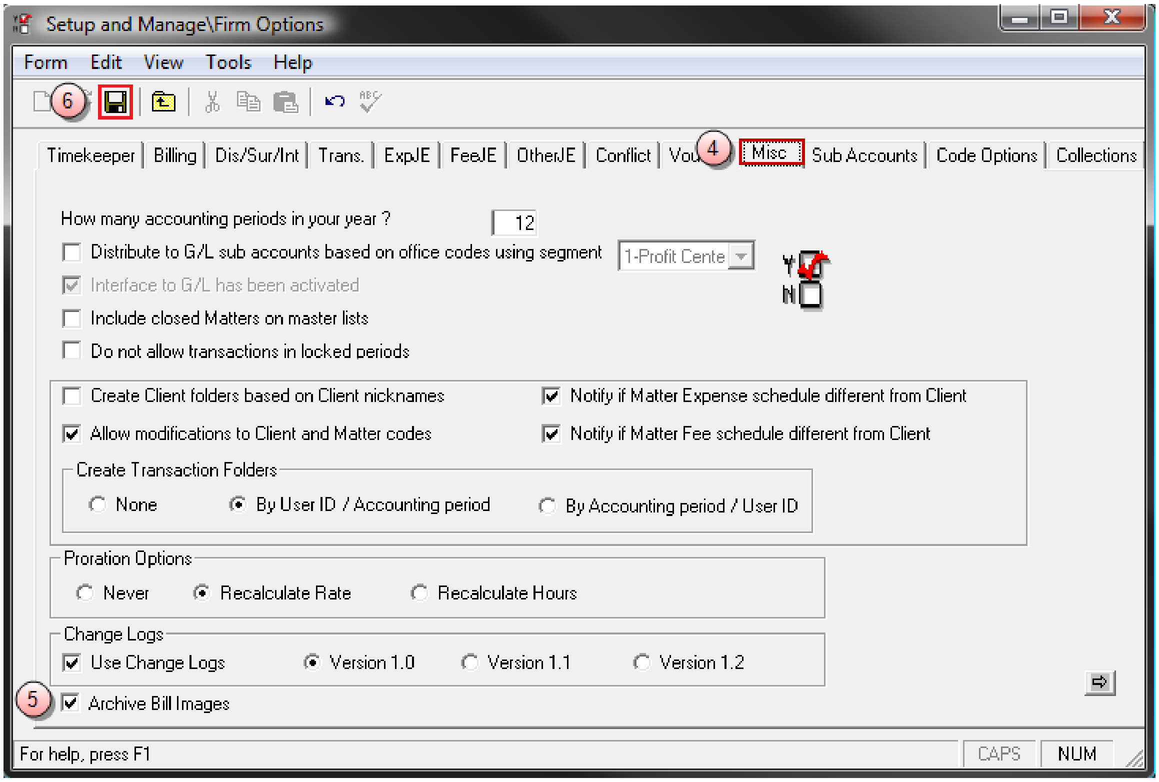
4. Click the **Billing** tab.
5. In the **Enter billing on which form?** section, click to select the appropriate option.
6. In the **Enter the default threshold for expenses**, type the threshold.
7. In the **Enter the default threshold for fees**, type the threshold. .
8. In the **Change Billing Frequency to** section, click to select the billing frequency to be used after posting a flat fee bill.
9. In the **Change Billing Agreement to** section, click to select the billing agreement interval to hourly, or leave as a flat fee.

10. Click **Save** to save your changes. Note that you can also select **Form** > **Save** from the toolbar, or press **Ctrl** + **S** on your keyboard.
11. Place Juris back into **Normal** mode.

Archive bill images

1. Verify that all users are logged out of Juris by running the Who's Online inquiry.
2. Place Juris in **Maintenance** mode.
3. Select **Setup and Manage** > **Firm Options**.

   The Setup and Manage\Firm Options window opens.



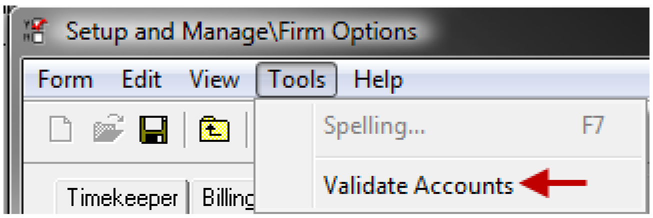
4. Click the **Misc** tab.
5. Click to check the **Archive Bill Images** check box.
6. Click **Save** to save your changes. Note that you can also select **Form** > **Save** from the toolbar, or press **Ctrl** + **S** on your keyboard.
7. Place Juris back into **Normal** mode.

Validate Accounts

The Validate Accounts function checks all of the areas in Juris where there are required G/L account numbers and verifies that a G/L number has been provided.

To validate accounts:

1. Verify that all users are logged out of Juris by running the Who's Online inquiry.
2. Place Juris in **Maintenance** mode.
3. Go to **Setup and Manage** > **Firm Options**.



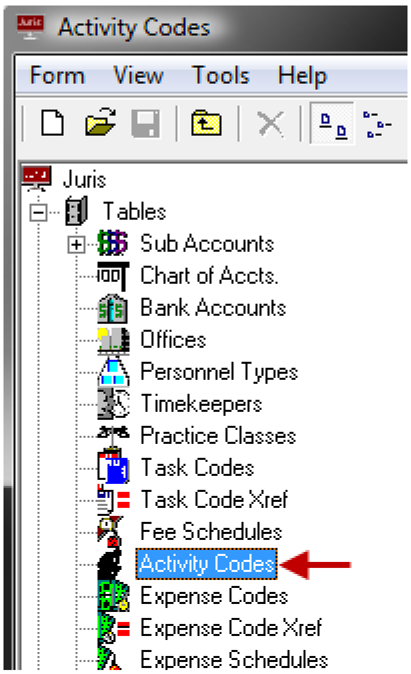
4. While in 'Firm Options,' select **Tools** > **Validate Accounts**.
5. Click **Save** your changes. Note that you can also select **Form** > **Save** from the toolbar, or press **Ctrl** + **S** on your keyboard.
6. Place Juris back into **Normal** mode.

Set up codes

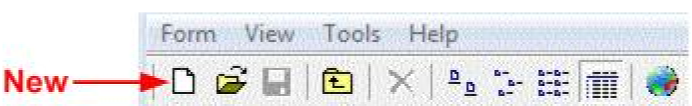
Create a new Activity Code

To create a new Activity Code:

1. Select **Tables** > **Activity Codes**.

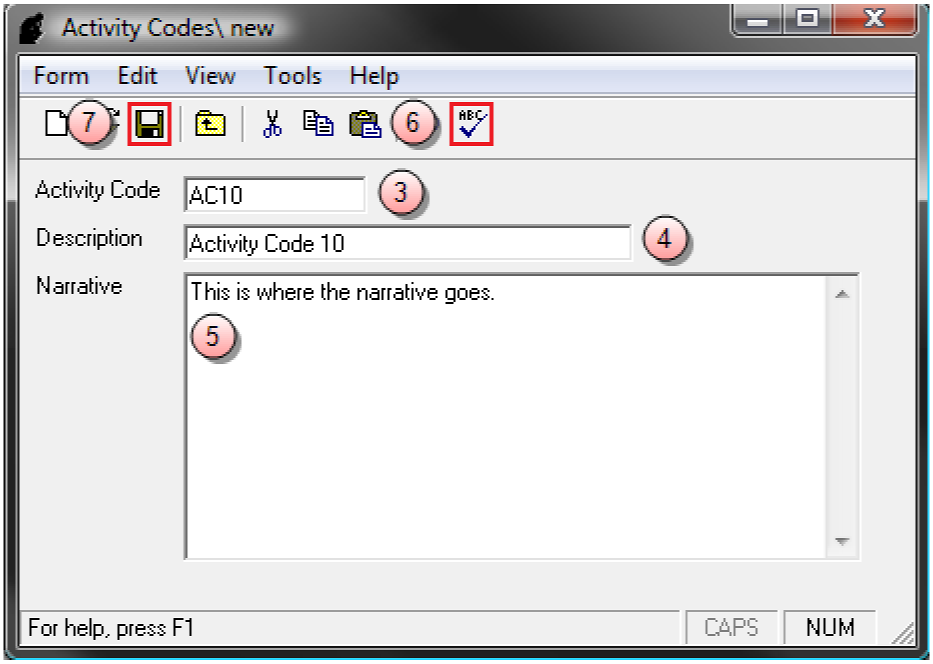


An Activity Codes list window opens.



2. Click the **New** icon on the toolbar.

The Activity Codes\new window opens.



3. Enter a 1-4 character **Activity Code**.

   The code can be comprised of digits, alpha characters, or a combination of both.

4. Enter a 1-99 character **Activity Code Description**.

5. Enter default **Activity Code Narrative** (1-7500 characters).

   > **NOTE:** The **Enter** and **Tab** keys are used to navigate from one text box on the Juris form to the next without having to use the mouse, but using **Ctrl + Enter** or **Ctrl + Tab** allows carriage returns or tabs to be inserted within the **Narrative** text box.

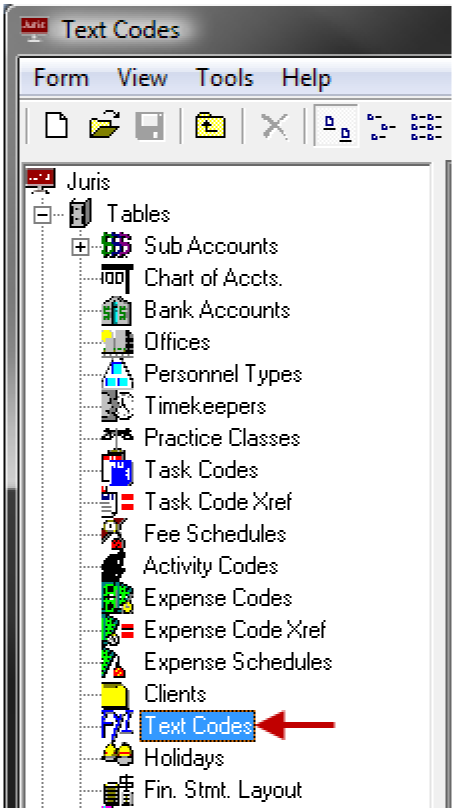
6. Click the **Spell Check** icon on the toolbar to spell check the form.

7. Click the **Save** icon on the toolbar to save the activity code.

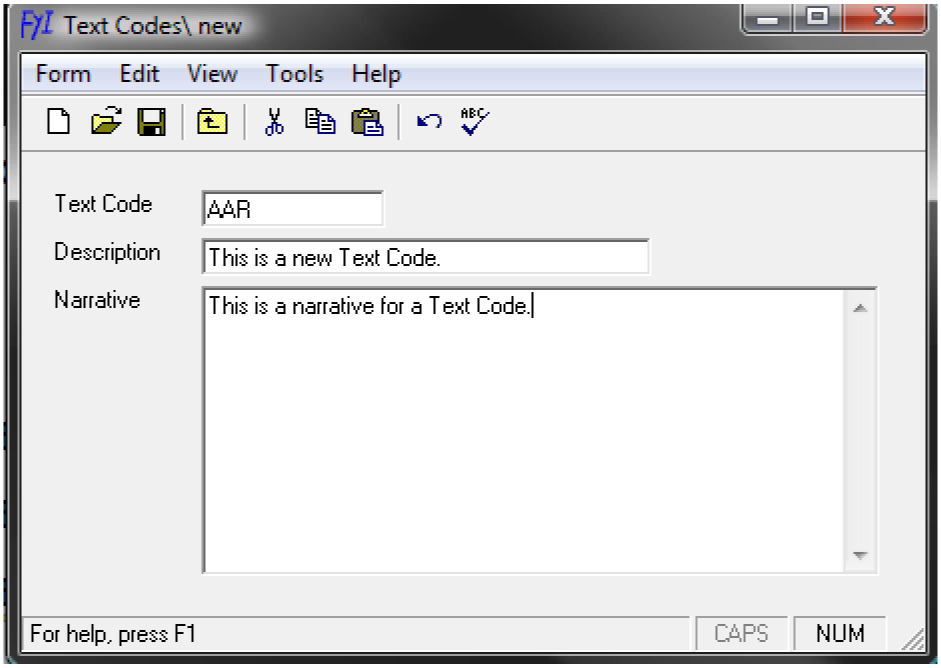
Create a new Text Code

To create a new Text Code:

1. Select **Tables** > **Text Codes**.



2. Click the **New** icon on the toolbar to open a new **Text Codes** schedule form. Note that you can also select **Form** > **New** > **Accounting Period** from the menu, or press **Ctrl** + **N** on your keyboard.



3. In the Text Code text box, type a 1-4 character name.

   The name can be comprised of digits, alpha characters, or a combination of both.

4. In the Description text box, type a 1 - 30 character description.
5. In the **Narrative** text box, type the text to be inserted when the Text Code is used.

   > **TIP:** The Enter and Tab keys are used to navigate from one field on the Juris form to the next field without having to use the mouse, but using CTRL+ Enter or CTRL + Tab will allow carriage returns or tabs to be inserted within the Narrative field.

6. Click the **Spell Check** icon on the toolbar to spell check the form. Note that you can also select **Form** > **Spelling** from the menu, or press **F7** on your keyboard.
7. Click the **Save** icon on the toolbar to save the **Text Code**. Note that you can also select **Form** > **Save** from the menu, or press **Ctrl** + **S** on your keyboard.

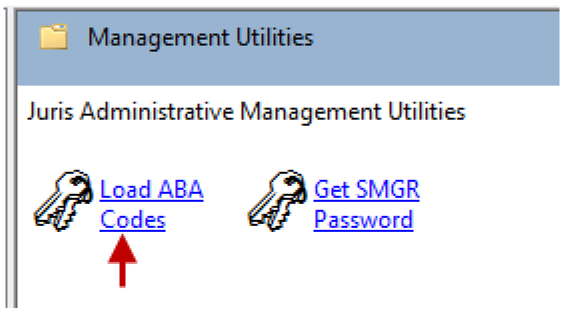
Import Activity Codes

In cooperation with the ABA and ACCA, Juris allows standard Activity Codes to be imported and used in cooperation with the guidelines of the Uniform Task-Based Management System (UTBMS).

To import Activity Codes:

1. Verify that all users are logged out of Juris by running the Who's Online inquiry.
2. Place Juris in **Maintenance** mode to prevent users from logging in until the import is complete.
3. Select **Start** > **Programs** > **Juris** > **Administrative Tools** > **Juris Management Console** from the desktop to open the Juris Management Console.
4. In the **Juris Management Console**, click on the company name.

   The Management Utilities display.

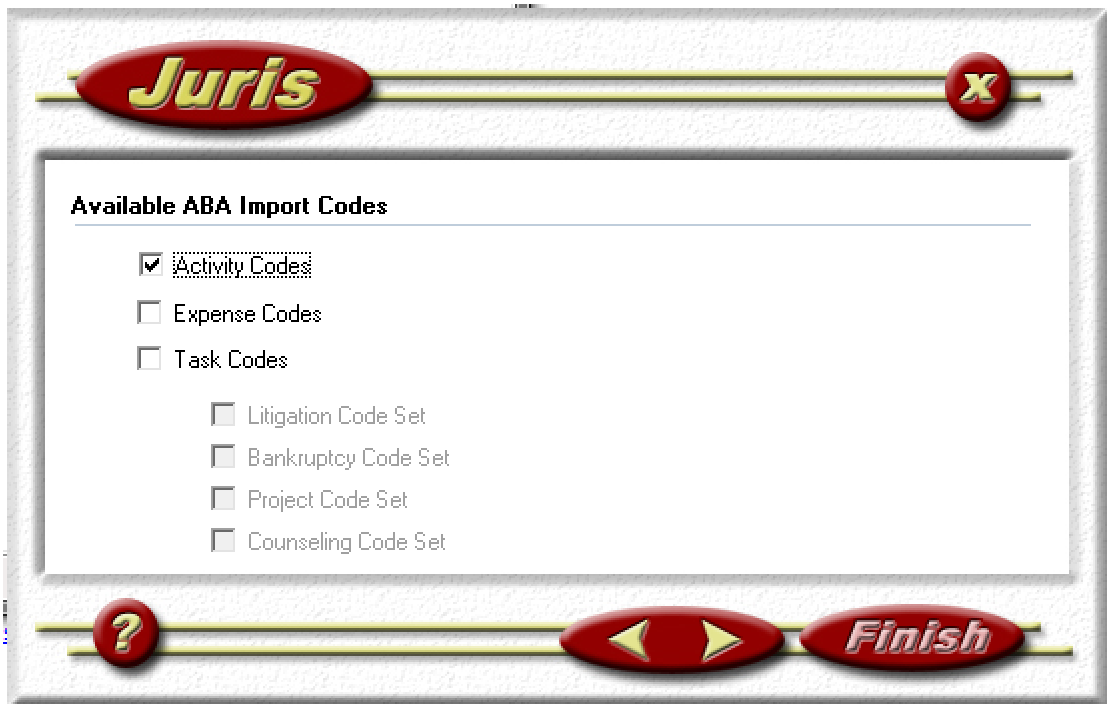
   

5. Select **Management** > **Load ABA Codes**.

   A window indicating that a wizard will assist in the code import displays.

6. Click the **Next** arrow.

   The Available AMA Import Codes window opens.



7. Click on the **Activity Codes** check box to select it.
8. Click the **Forward** arrow again.
9. Review the options selected, then click **Finish** to import the Activity Codes.
10. Once import is complete, close the Management Console.
11. Place Juris back into **Normal** mode, so that users can enter Juris again.

Expense cross-reference (Xref) overview

The Expense Code Cross Reference (xref) can be used when a client prefers to see their own specific expense codes on their bills. If the client's codes are not the same as the firm's internal system for expense codes, the Expense Code Xref maps the firm's code to the client's code and description. This allows expenses to be entered into Juris using the firm's normal expense codes, yet the cross-referenced code may be placed on the client's bill for their convenience.

Expense Codes are entered into Expense Code Cross Reference Lists. These Cross Reference Lists allow a relationship to be established between Firm Expense Codes and Client Expense Codes. For example, the firm's Expense Code for copy expenses may be E101 but a particular Client wishes or even requires that their code, 'COPY' be used on their bills instead of the code E101.

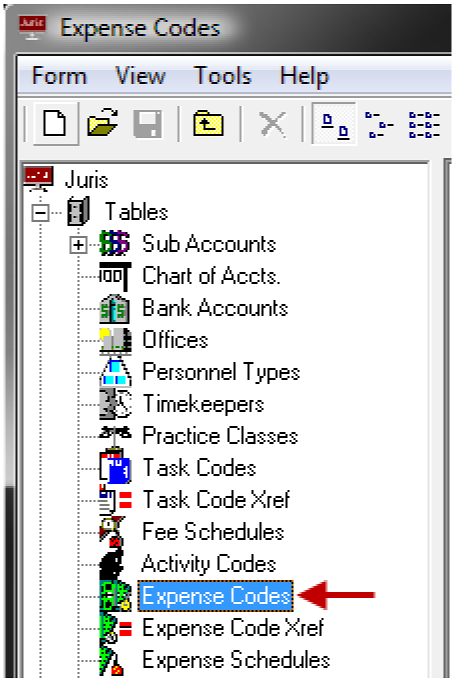
Once an Expense Code Cross Reference List is created, it may be assigned to applicable Clients and Matters. In Bill Formats, the cross-referenced values for expense code and description may be used in lieu of the Firm's Code and Description. Including the Xref Code and description in the bill format is often a requirement if the firm is using JurisBX to create mandated electronic bills for that Client/Matter.

> **NOTE:** If an Expense Code Xref is used for a Client or Matter, not all firm expense codes are required to be entered in the Xref list. Juris reverts to the Standard Expense Code schedule for expenses that are not included in the Xref list.

Create a new Expense Code

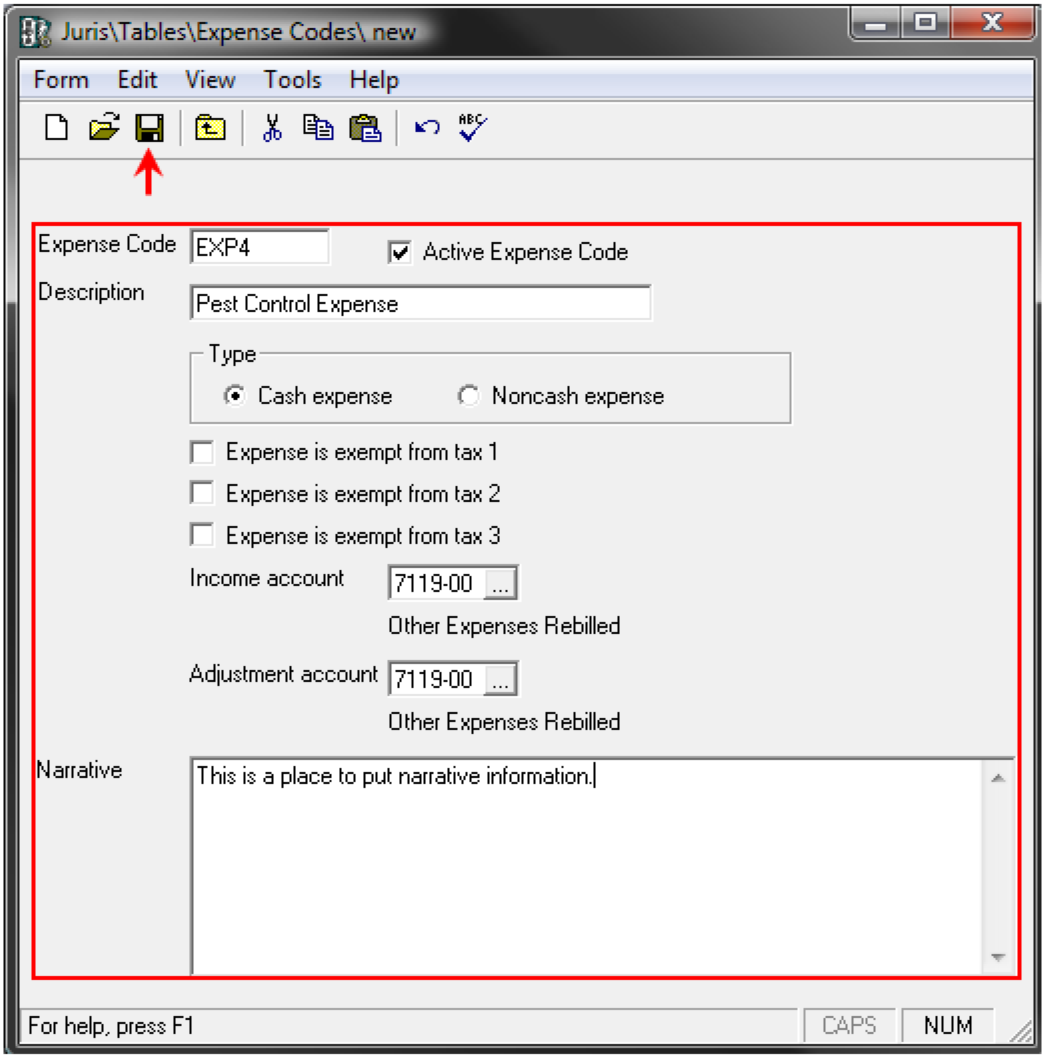
To create a new Expense Code:

1. Select **Tables** > **Expense Codes**.



The Juris\Tables\Expense Codes window opens.

1. Click the **New** icon on the toolbar to open the Juris\Tables\Expense Codes\new window. Note that you can also select **Form** > **New** from the menu, or press **Ctrl** + **N** on your keyboard.



2. Type an **Expense Code**.

3. Type a **Description**.

4. Select the expense Type: **Cash** or **Noncash**..

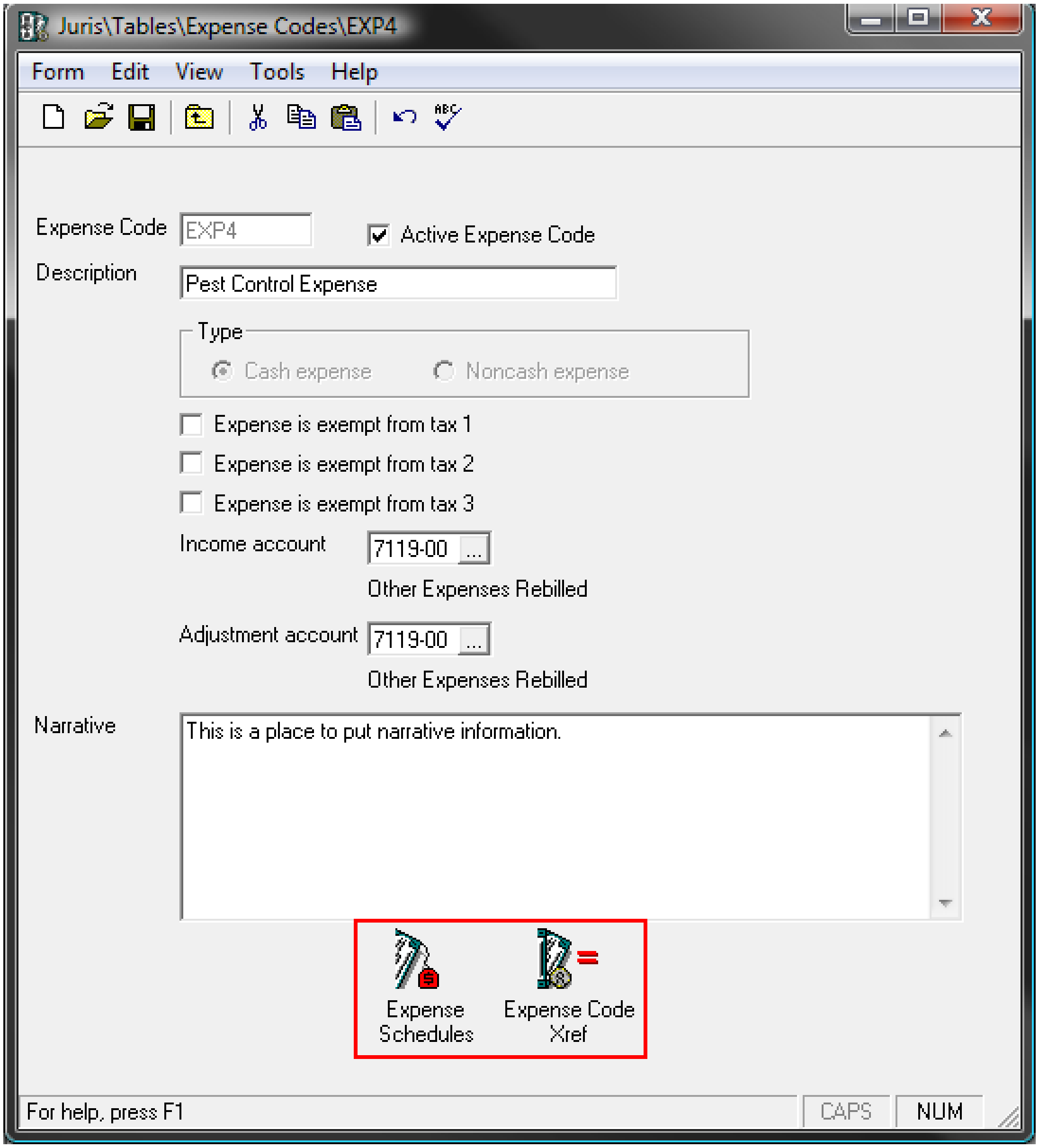
5. > **NOTE:** Once the expense code is saved, the 'Type' may only be changed when the following conditions exist:Juris is in Maintenance Mode or No open prebills exist that have expenses that use that expense code.

6. If the expense is exempt from **Tax 1, Tax 2,** and **Tax 3**, click on the appropriate check box to place a check mark in it. A check mark indicates that the expense is not taxable (i.e., tax exempt).

7. For Cash expenses, an **Income** and **Adjustment** account must be chosen, for Noncash expenses , an **Income** account must be chosen.
8. Type a **Narrative** for the Expense Code.

   When the expense code is used, the narrative entered here is placed in the Expense Entry Narrative.
9. Click the **Spell Check** icon on the toolbar to spell-check the form. Note that you can also select **Form** > **Spelling** from the menu, or press **F7** on your keyboard.
10. Click the **Save** icon on the toolbar to save the schedule. Note that you can also select **Form** > **Save** from the menu, or press **Ctrl** + **S** on your keyboard.

    Once saved, the Expense Schedules and Expense Code Xref Schedule icon appears.



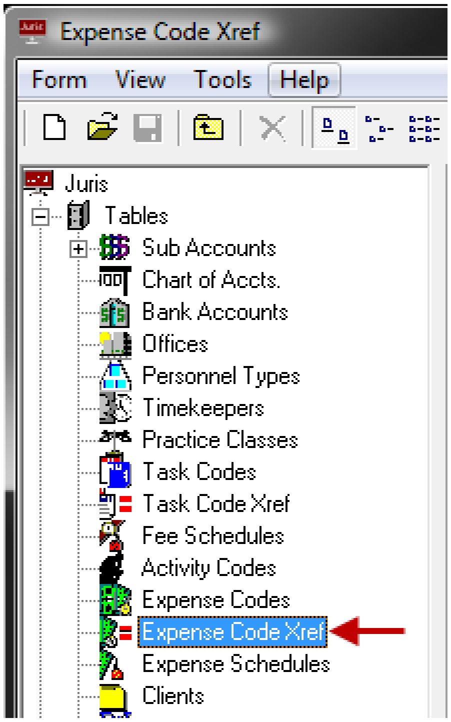
11. Click the icon to open the **ExpenseSchedule** and review the form.

12. Click the icon to open the Expense Code Xref and review the form.

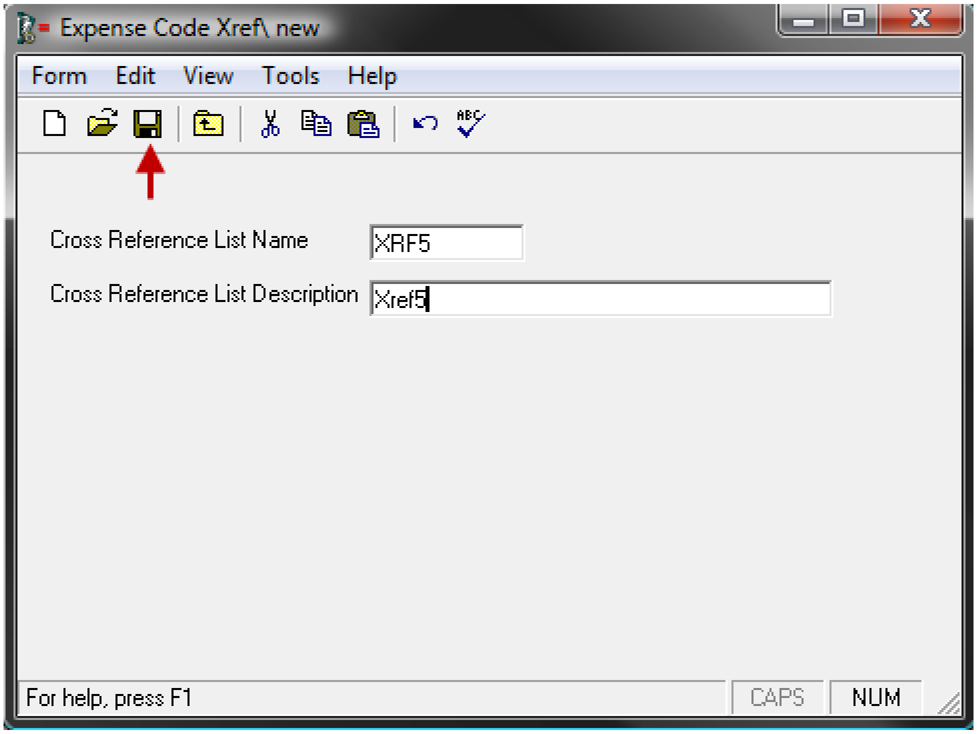
Create a new Expense Code Xref

To create a new Expense Code Xref:

1. Select **Tables** > **Expense Code Xref**.

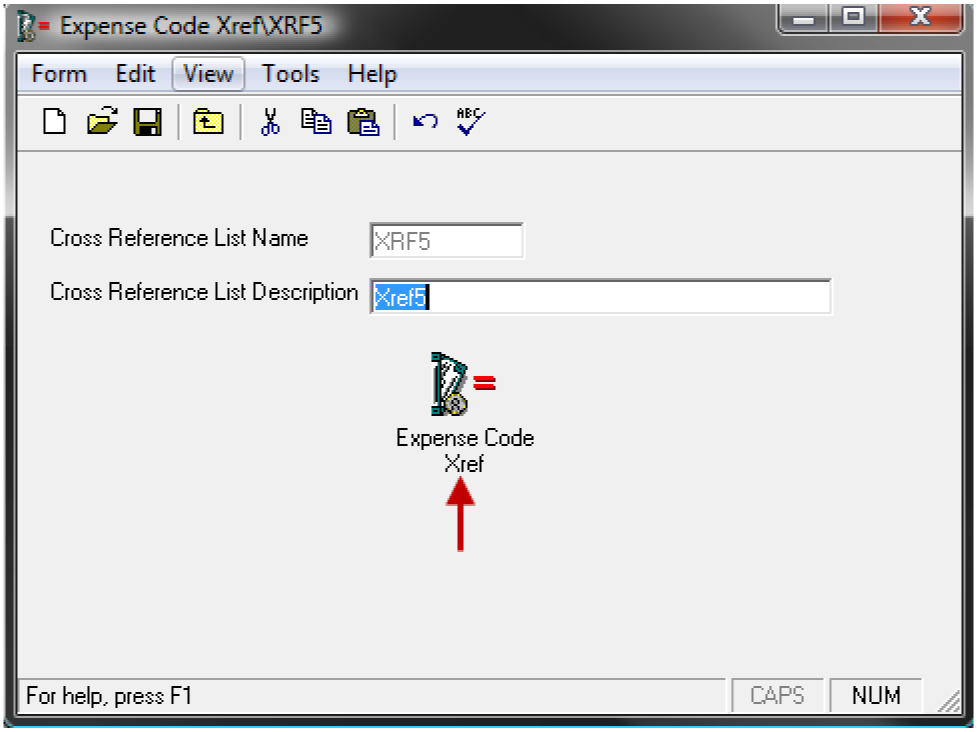


2. Click the **New** icon on the toolbar to open a new Expense Code Xref schedule form. Note that you can also select **Form** > **New** from the menu, or press **Ctrl** + **N** on your keyboard.

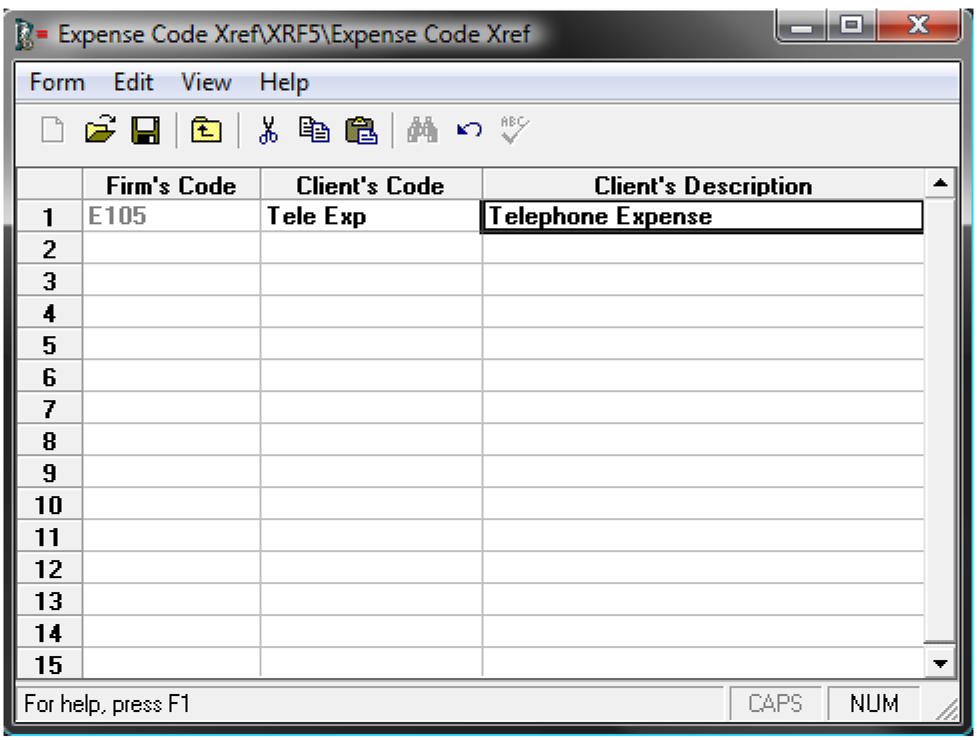


3. In the **Cross Reference List Name** text box, type a 1-4 character name.
4. In the **Cross Reference List Description** text box, type a 1 - 30 character description.
5. Click the **Spell Check** icon on the toolbar to initiate the spell checker. Note that you can also select **Form** > **Spelling** from the menu, or press **F7** on your keyboard.
6. Click the **Save** icon on the toolbar to save the new cross reference. Note that you can also select **Form** > **Save** from the menu, or press **Ctrl** + **S** on your keyboard.

   Once saved the Expense Code Xref schedule icon appears.



7. Click the **Expense Code Xref** icon to open the Expense Xref Schedule.



8. In the **Firm's Code** column, type in the expense code as used by the firm.

The code may also be looked up by clicking the lookup icon to display a list of all Expense Codes in the Standard Expense Schedule.

9. Type in the appropriate **Client's Code** and **Client's Description**.

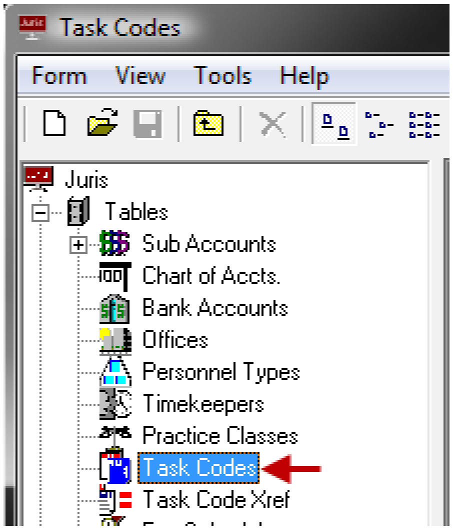
   The Client's Code may be 1-8 characters in length, and the Client's Description may be 1-99 characters in length. The Client's Code and Client's description are the expense codes that the client requires for their bills.

10. Click the **Save** icon in the toolbar. Note that you can also select **Form** > **Save** from the menu, or press **Ctrl** + **S** on your keyboard.

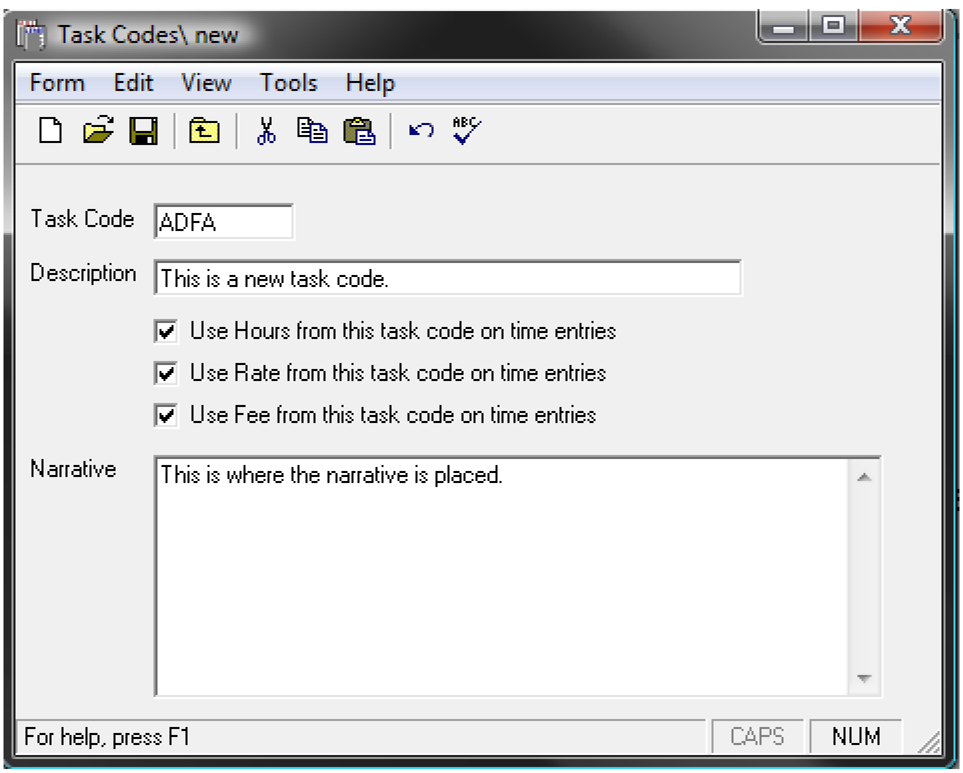
Create a new Task Code

To create a new Task Code:

1. Select **Tables** > **Task Codes**.



2. Click the **New** icon on the toolbar to open a new Task Code form.



3. In the **Task Code** text box, type a 1-4 character name.

   The code can be digits, alpha characters, or a combination of both.

4. In the **Description** text box, type a 1 - 30 character description for the task code.

5. Place a checkmark beside one or more of the following options:

   - Use **hours** from this task code on time entries, inserts the hours from the Fee Schedule into the Time Entry.
   - Use **rate** from this task code on time entries, inserts the rate from the Fee Schedule into the Time Entry.
   - Use **fees** from this task code on time entries, inserts the fees from the Fee Schedule into the Time Entry.

   > **NOTE:** The Task Code must be assigned to applicable Fee Schedules in order for the *Use Hours...*, *Use Rate...* and or *Use Amount...* options above to be in effect. When that Fee Schedule is assigned to applicable Matters *Use Hours...*, *Use Rate...* and or *Use Amount...* options are selected, then the appropriate values will be used on Time b for the Matter when that Task Code is used

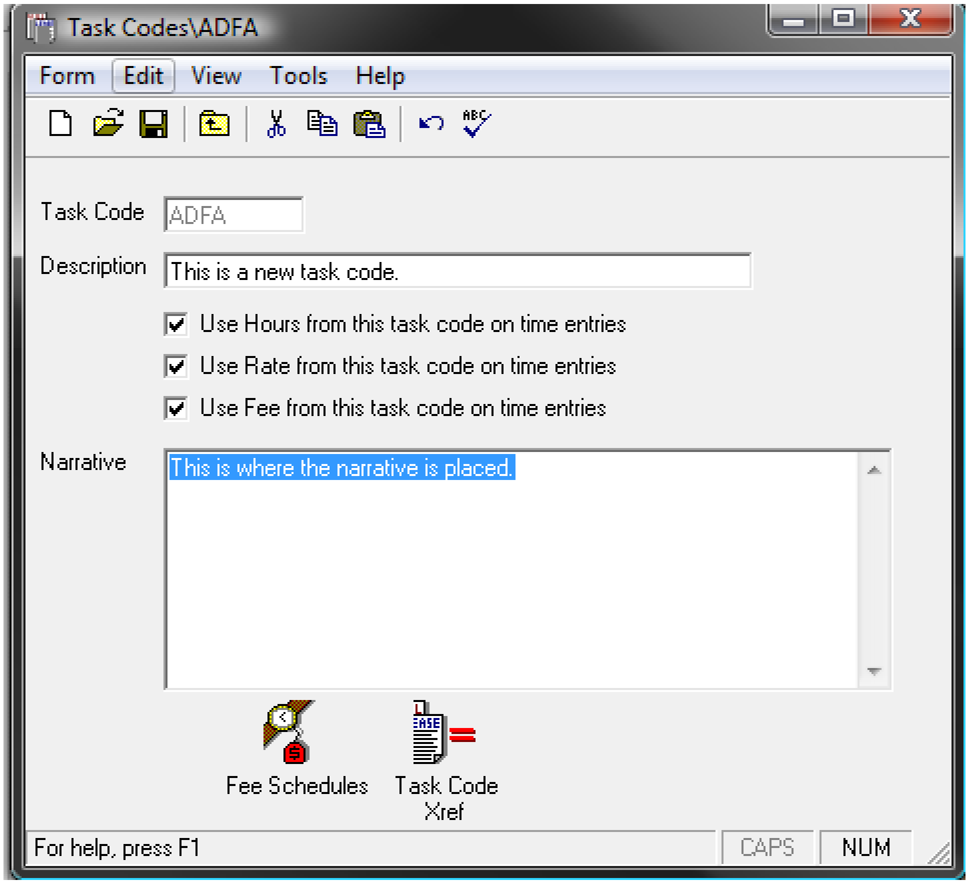
6. In the **Narrative** text box, type a narrative for the task code.

   When the task code is used, the narrative entered here is placed in the time or expense entry narrative.

7. Click the **Spell Check** icon on the toolbar to initiate the spell checker.

8. Click the **Save** icon on the toolbar to save the schedule.

   Once saved, the Fee Schedules and Task Code Xref (cross reference) schedule icons appear in the form.



9. Click the **Fee Schedules** icon to open the Fee Schedule, and review the form.

   The code may also be added to fee schedules, if desired.

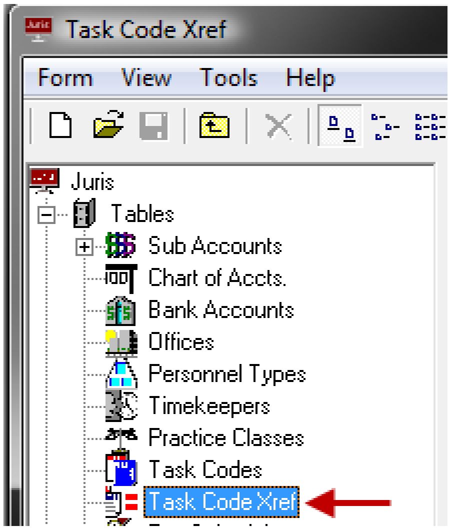
10. Click the **Task Code Xref** icon to open the Task Code Xref, and review the form.

11. Click the **Save** icon to save the new task code. Note that you can also select **Form** > **Save** from the menu, or press **Ctrl** + **S** on your keyboard.

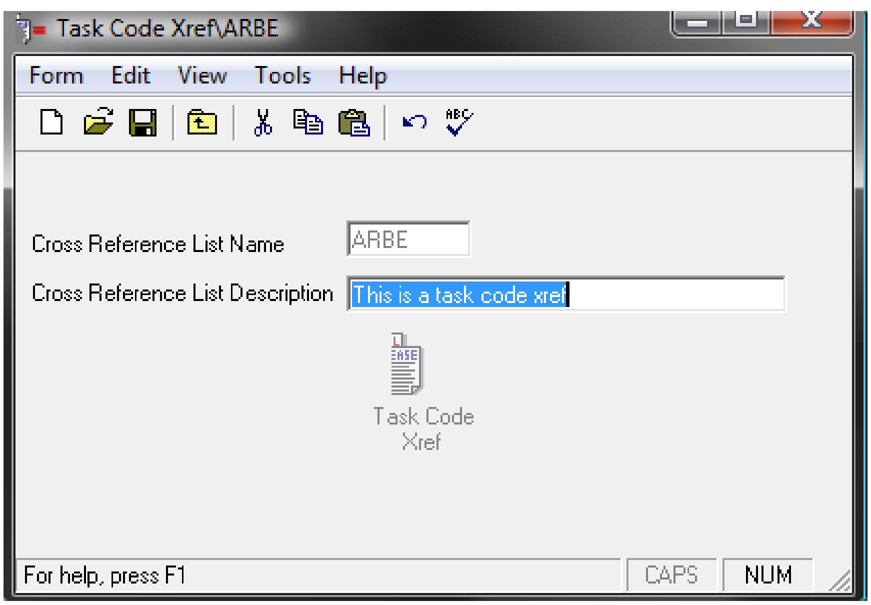
Create a new Task Codes Xrefs

To create a Task Code cross reference:

1. Select **Tables** > **Task Code Xref**.



2. Click the **New** icon on the toolbar to open a new Task Code Xref schedule form.



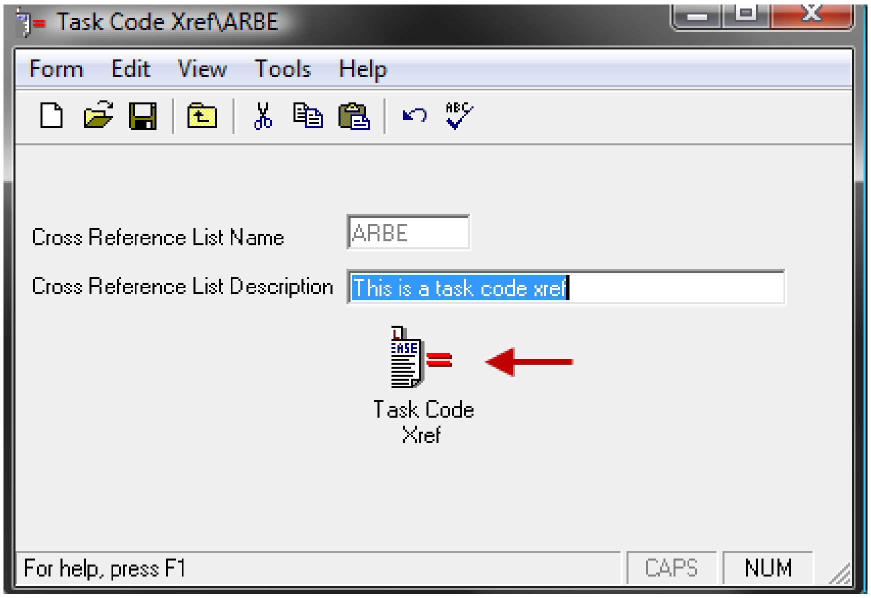
3. In the **Cross Reference List Name** text box, type a 1-4 character name.

   The name can be digits, alpha characters, or a combination of both.

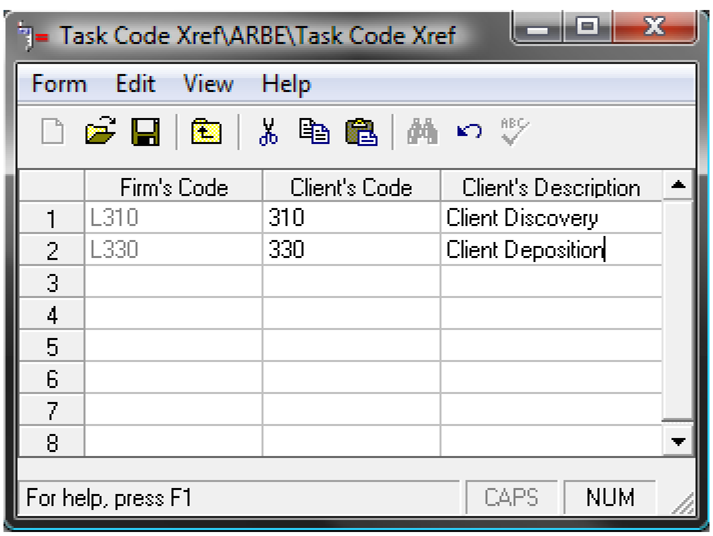
4. In the **Cross Reference List Description** text box, type a 1 - 30 character description.

5. Click the **Spell Check** icon on the toolbar t initiate the spell checker.
6. Click the **Save** icon on the toolbar to save the new task code cross reference.

   Once saved, the Task Code Xref schedule icon appears.



7. Click the **Task Code Xref** icon to open the Task Xref schedule.



8. In the **Firm's Code** column, type in the **Task** code as used by the firm.

   The code may also be looked up by clicking the lookup icon, which pulls up a list of all Task codes in the Standard Task Schedule.
9. Type in the appropriate **Client's Code** and **Client's Description**.

The Client's Code may be 1-8 alphanumeric characters in length, and the Client's Description may be 1-99 alphanumeric characters in length. The Client's Code and Client's description are the Task codes that the client requires for their bills.

Glossary

ABA – American Bar Association

ER – End Ratio

SR – Start Ratio

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

Common functions and shortcuts lists

Common Functions

Function	Icon	Tool Menu Mouse Click	Tool Menu Key Stroke	Keystroke Shortcut
New		Form > New	Alt + F > N	Ctrl + N
Open		Form > Open	Alt + F > O	Ctrl + O
Save		Form > Save	Alt + F > S	Ctrl + S
Back a level		Form > Close	Alt + F > C	Ctrl + H
Cut		Edit > Cut	Alt + E > T	Ctrl + X
Copy		Edit > Copy	Alt + E > C	Ctrl + C
Paste		Edit > Paste	Alt + E > P	Ctrl + V
Undo		Edit > Undo	Alt + E > U	Ctrl +Z
Spell Check		Tools > Spelling	Alt + T > S	F7
Find (lookup)		Tools > Find	Alt + T > F	F5
Find (lookup)		Tools > Find	Alt + T > F	F5
Delete		Form > Delete	Alt + F > D	none
Close		Form > Close	Alt + F > C	F4
Drop-down		none	none	none
View/Hide Toolbar	none	View > Toolbar	Alt + V > T	none
View/Hide Status Bar	none	View > Status Bar	Alt + V > B	none
Ready to Post	none	Tools > Ready To Post	Alt + T > R	none

Function	Icon	Tool Menu Mouse Click	Tool Menu Key Stroke	Keystroke Shortcut
Preferences	none	Tools > Preferences	Alt + T > P	none
Help	none	Help > Help Topics	Alt + H > H	F1

Shortcuts

Shortcut	Action
F1	Opens Help
F2	Use after typing in the text code to expand the text. Clears invalid field in Cash Receipts
F4	Opens drop down lists (when available)
F5	Opens the Find (lookup) tool.
F6	Opens ZOOM in Cash receipts to view/edit cash allocations.
F7	Runs Spell Check
F8	Runs Wizard cash allocation in Cash Receipts. Allocates amount to G/L account on G/L Distributions in Vouchers. Allocates amount to expense code on Expense Distributions in Vouchers
F9	Using this key will repeat , field by field, the value used in the previous transaction.
F10	Activate the Menu Bar
F11	Opens G/L Distribution form in Vouchers. Shows Prebill Format in Edit Prebills.
F12	Opens Expense Distribution form in Vouchers.

Shortcut	Action
	Shows Final Bill Format in Edit Prebills.
Down Arrow	Opens lookup for field options (when lookup is available)
Ctrl + Enter	Inserts a blank line in a field (use in narratives, address, etc.)
Ctrl + Tab	Inserts a tab in a field (use in narratives, address, etc.)
Tab	Move forward, field by field.
Shift + Tab	Move backwards, field by field.
Ctrl + Right Arrow	Move to the beginning of the next word in a field.
Ctrl + Left Arrow	Move to the beginning of the previous word in a field.
Ctrl + Shift + Right Arrow	Highlight the next word
Ctrl + Shift + Left Arrow	Highlight the previous word.
Ctrl + O	Open selected item.
Alt + F4	Close the current window.
Ctrl + F	Opens the Find tool.