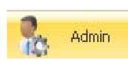
Recommendations for Permissions & Settings

MYJURIS & JURIS ACTIVE INFORMATION (JURIS SUITE)

The following document contains recommendations for configuring Juris Suite at a law firm. Please note that these settings may not be applicable for all firms and that evaluation of the firm's specific needs and workflow are essential to assure a successful implementation. This document contains guidelines only and provides the firm with a location to document their elected choice at time of implementation to be available for future reference.

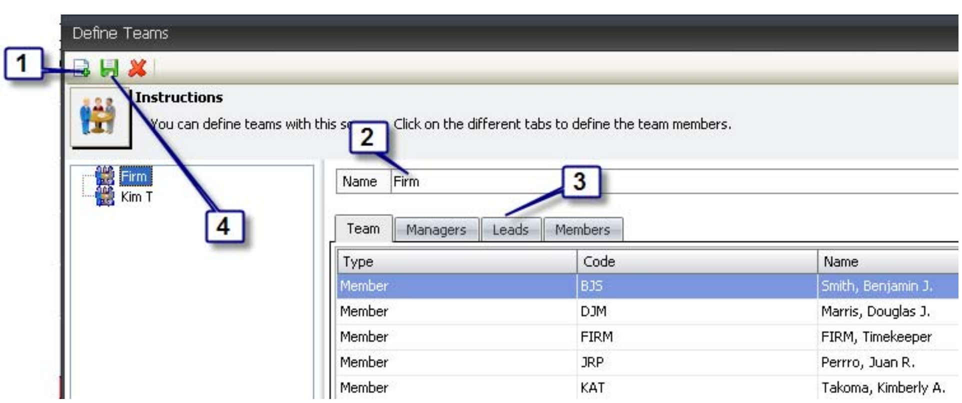
TEAMS AND GROUPS

Teams are used for time entry management; and teams determine who is allowed to view the entries of others and who is allowed to edit the entries of others. Groups are used for permission management and determine who is allowed to access each software feature.

Create a Team ( >  > )

Select Juris > Admin > Define Teams

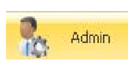
1. Click the ***New*** button in the **Define Teams** window.
2. Enter the **Name** of the new team. The name will also appear concurrently in the team list panel on the left. You will be limited in the length of the name.
3. Select the appropriate team members for **Managers**, **Leads** and **Members** by selecting the correct tab (Managers, Leads or Members) then select the name in the **Employee List**. Using the blue arrows, move the name from the Employee list on the left to the Managers/Leads/Members list on the right. Double-clicking a name will also move it from one list to the other.
    a. Managers: Can VIEW and EDIT the entries of all others on this team. (Can also view/edit their own entries.)
    b. Leads: Can VIEW the entries of all others on this team. (Can also view/edit their own entries.)
    c. Members: Can only view/edit their own entries.



4. Verify that the choices are accurate and click the ***Save*** button.

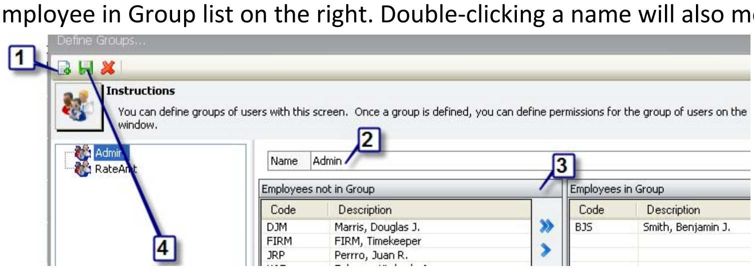
RECOMMENDED TEAMS

- FIRM team
  - Managers: All Juris Administrative Users
  - Leads: All Partners
  - Members: All other users
  - The purpose of this team is to allow the administrators full access to the entries of all timekeepers in the firm. This team also grants Partners with an 'bird's eye' view of the entire firm without opening them up to the possibility of accidentally altering or deleting anyone's time entries.
- Secretary/Timekeeper Teams
  - Managers: The secretary
  - Leads: none
  - Members: All timekeepers that that secretary assists
  - The purpose of this team is to allow the secretary to have full access to the entries of all timekeepers that he or she assists without exposing all of those timekeeper's entries to each other.
- Assistant/Partner Teams
  - Managers: The secretary
  - Leads: The partner
  - Members: None
  - The purpose of this team is to allow the secretary to have full access to the entries the partner with whom he or she is dedicated to assisting. This also allows the Partner to view the entries that the Secretary may enter (For firms that require administrative activities to be recorded on non-billable matters for resource management purposes.)

Create a Group ( >  > )

Select Juris > Admin > Define Groups

1. Click the ***New*** button on Define Groups window.
2. Enter the **Name** of the new group. The name will also appear concurrently in the group list panel on the left. Your will be limited in the length of the name.
3. Define the appropriate Employees to be in the group by selecting the name in the **Employee List**, then, using the blue arrows, move the name from the Employee not in the Group list on the left to the Employee in Group list on the right. Double-clicking a name will also move it from one list to the other.



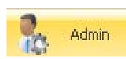
4. Verify that the choices are accurate and click the ***Save*** button.

RECOMMENDED GROUPS

- Admin Group
    - SMGR
    - Other Juris Administrative Users
- RateAmt
    - Partners
    - Other Users allowed to view items containing Rate or Amount information.
- NoRateAmt
    - Paralegals, Associates, Secretaries
    - Any user who should NOT see any Rate or Amount values

RECCOMENDATIONS FOR PERMISSIONS

Permissions are used to allow/disallow access to a function. Permissions designations should be made at Firm and Group levels whenever possible, avoiding the use of Deny. Suggestions are as follows:

Firm Permissions (> 

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FIRM		
CACHE SETTINGS – MYJURIS	**RECOMMENDED**	**ELECTED**
Look up List Size	Not Set	
MY VIEWS		
BILLED TIME VIEWS – MYJURIS	**RECOMMENDED**	**ELECTED**
Last X Months Standard Billed Amount	Not Set[1]	
Billed Time View By Amount Realization	Not Set[1]	
Billed Time View By Hours Realization	Grant	
Billed Time View By Rate Realization	Not Set[1]	
Last X Months Billed Amount	Not Set[1]	
Last X Months Billed Hours Worked	Grant	
Last X Months Hours Billed	Grant	
GAUGE VIEWS – MYJURIS	**RECOMMENDED**	**ELECTED**
Hours to Bill Gauge	Grant	
HEAT MAP VIEWS – MYJURIS	**RECOMMENDED**	**ELECTED**
Amount to Bill	Not Set[1]	
Amount Worked	Not Set[1]	
Billed Rate	Not Set[1]	
Effective Rate	Not Set[1]	
Hours to Bill	Grant	
Hours Worked	Grant	
TIMEKEEPER VIEWS – MYJURIS	**RECOMMENDED**	**ELECTED**
By Amount Timekeeper Analysis	Not Set[1]	

By Hours Timekeeper Analysis	Grant	
TIME VIEW – MYJURIS	**RECOMMENDED**	**ELECTED**
Time Data View By Amount	Not Set[1]	
Time Data View By Billable Amount	Not Set[1]	
Time Data View By Billable Hours Work	Grant	
Time Data View By Count	Grant	
Time Data View By Hours to Bill	Grant	
Time Data View By Hours Work	Grant	
Time Data View By Non-billable Amount	Not Set[1]	
Time Data View By Non-billable Hours Work	Grant	
TOP VIEWS – MYJURIS	**RECOMMENDED**	**ELECTED**
Top Activity Codes by Amount	Not Set[1]	
Top Activity Codes By Count	Grant	
Top Activity Codes By Hours to Bill	Grant	
Top Activity Codes By Hours Work	Grant	
Top Clients By Amount	Not Set[1]	
Top Clients By Count	Grant	
Top Clients By Hours to Bill	Grant	
Top Clients By Hours Work	Grant	
Top Matters By Amount	Not Set[1]	
Top Matters By Count	Grant	
Top Matters By Hours to Bill	Grant	
Top Matters By Hours Work	Grant	
Top Task Codes By Amount	Not Set[1]	
Top Task Codes By Count	Grant	
Top Task Codes By Hours to Bill	Grant	
Top Task Codes By Hours Work	Grant	
TREND VIEWS – MYJURIS	**RECOMMENDED**	**ELECTED**
By Period Average Billed Rate	Not Set[1]	
By Period Bill Realization	Not Set[1]	
By Period Chargeable Hours	Grant	
By Period Fees Received	Not Set[1]	
By Year Average Billed Rate	Not Set[1]	
By Year Bill Realization	Not Set[1]	
By Year Chargeable Hours	Grant	
By Year Fees Received	Not Set[1]	
MY CALENDAR		
GENERAL – MYJURIS	**RECOMMENDED**	**ELECTED**
Can Use Calendar	Grant	
SETTINGS – MYJURIS	**RECOMMENDED**	**ELECTED**
Amount to Bill – High	Not Set[1]	
Amount to Bill – Low	Not Set[1]	

Amount to Bill – Target	Not Set[1]	
Amount Worked – High	Not Set[1]	
Amount Worked – Low	Not Set[1]	
Amount Worked – Target	Not Set[1]	
Billable Rate – High	Not Set[1]	
Billable Rate – Low	Not Set[1]	
Billable Rate – Target	Not Set[1]	
Effective Rate – High	Not Set[1]	
Effective Rate – Low	Not Set[1]	
Effective Rate – Target	Not Set[1]	
Heat Map Style	Grant	
High Color	Grant	
Hours to Bill – High	Not Set[1]	
Hours to Bill – Low	Not Set[1]	
Hours to Bill – Target	Not Set[1]	
Hours Work – High	Not Set[1]	
Hours Work – Low	Not Set[1]	
Hours Work – Target	Not Set[1]	
Low Color	Grant	
Target Color	Grant	
MY WEBLINKS		
GENERAL – MYJURIS	**RECOMMENDED**	**ELECTED**
Can Use Weblinks	Grant	
MY TIME		
ATTACHMENTS – MYJURIS	**RECOMMENDED**	**ELECTED**
Can Use Attachments	Grant [3]	
FILTERS – MYJURIS	**RECOMMENDED**	**ELECTED**
Copy Filters	Not Set[2]	
Create Filters	Grant	
Publish Filters	Not Set[2]	
GENERAL – MYJURIS	**RECOMMENDED**	**ELECTED**
Can Use Time	Grant	
LAYOUTS – MYJURIS	**RECOMMENDED**	**ELECTED**
Can Copy Layouts	Not Set[2]	
Can Create Layouts	Grant	
SETTINGS – MYJURIS	**RECOMMENDED**	**ELECTED**
Allow Multiple Timers	Not Set[2]	
Approver for Time	Not Set[2]	
Batch Frequency	Not Set[2]	
Batch Sort Order	Not Set[2]	
Batch Status	Not Set[2]	
Calendar Time Slot Interval	Grant	

Duplicate Activity Code	Grant	
Duplicate Client/Matter	Grant	
Duplicate Date	Grant	
Duplicate Task Code	Grant	
Duplicate Timekeeper	Grant	
Editor Start up Field	Grant	
Show Default Layouts	Grant	
Submit on Cache Synchronize	Not Set[2]	
Timer Rounding Factor	Not Set[2]	
Transfer Time When Time Entry is Saved	Grant	
SPLITS – MYJURIS	**RECOMMENDED**	**ELECTED**
Can Edit Time Split Details	Grant	
Can Split Time Entry	Grant	
Can Use Time Entry Split Designer	Not Set[2]	
Can Use Time Splits	Grant	
Status Details	Recommended	Elected
Can Use Time Split Details	Grant	
Tools	Recommended	Elected
Can Use Time Entry Import	Grant	
Can Use Time Entry Rule Designer	Not Set[2]	
MY EXPENSES		
ATTACHMENTS – MYJURIS	**RECOMMENDED**	**ELECTED**
Can Use Expense Attachments	Grant[4]	
FILTERS – MYJURIS	**RECOMMENDED**	**ELECTED**
Copy Filters	Not Set[2]	
Create Filters	Grant	
Publish Filters	Not Set[2]	
GENERAL – MYJURIS	**RECOMMENDED**	**ELECTED**
Can Use Expenses	Grant	
LAYOUTS – MYJURIS	**RECOMMENDED**	**ELECTED**
Copy Layouts	Not Set[2]	
Create Layouts	Grant	
SETTINGS – MYJURIS	**RECOMMENDED**	**ELECTED**
Approver for Expenses	Not Set[2]	
Batch Frequency	Not Set[2]	
Batch Sort Order	Not Set[2]	
Batch Status	Not Set[2]	
Duplicate Client/Matter	Grant	
Duplicate Date	Grant	
Duplicate Expense Code	Grant	
Duplicate Incurred By	Grant	
Duplicate Task Code	Grant	

Editor Startup Field	Grant	
Submit on Cache Synchronize	Not Set[2]	
STATUS DETAILS – MYJURIS	**RECOMMENDED**	**ELECTED**
Can Use Expense Details	Grant	
TOOLS – MYJURIS	**RECOMMENDED**	**ELECTED**
Can Use Expense Entry Import	Grant	
Can Use Expense Entry Rule Designer	Not Set[2]	
Can Use Expense Entry Split Designer	Not Set[2]	
DISTRIBUTIONS		
GENERAL – ACTIVE INFORMATION	**RECOMMENDED**	**ELECTED**
Can Maintain Report Distributions	Not Set[2]	
Can View Distribution Log	Not Set[2]	
SETTINGS – ACTIVE INFORMATION	**RECOMMENDED**	**ELECTED**
From E-mail Address	Not Set[2]	
Smtp Host Address	Not Set[2]	
Webserver Url	Not Set[2]	
REPORTS		
GENERAL – ACTIVE INFORMATION	**RECOMMENDED**	**ELECTED**
Can Create Reports	Not Set[2]	
Can Delete Reports	Not Set[2]	
Can Modify Reports	Not Set[2]	
IMPORT/EXPORT – ACTIVE INFORMATION	**RECOMMENDED**	**ELECTED**
Can Export Reports	Not Set[2]	
Can Import Reports	Not Set[2]	
KEYWORDS – ACTIVE INFORMATION	**RECOMMENDED**	**ELECTED**
Can Modify/Delete Keywords	Not Set[2]	
TEAMS – ACTIVE INFORMATION	**RECOMMENDED**	**ELECTED**
Can Override Team Restriction	Not Set[2]	
QUERIES		
GENERAL – ACTIVE INFORMATION	**RECOMMENDED**	**ELECTED**
Can Create Queries	Not Set[2]	
Can Delete Queries	Not Set[2]	
Can Modify Queries	Not Set[2]	
Can View Query Manager	Not Set[2]	
IMPORT/EXPORT – ACTIVE INFORMATION	**RECOMMENDED**	**ELECTED**
Can Export Queries	Not Set[2]	
Can Import Queries	Not Set[2]	
SCHEMAS		
GENERAL – ACTIVE INFORMATION	**RECOMMENDED**	**ELECTED**
Can Create Schemas	Not Set[2]	
Can Delete Schemas	Not Set[2]	

Can Modify Schemas	Not Set[2]	
Can View Schema Manager	Not Set[2]	
SYNCHRONIZE V	**RECOMMENDED**	**ELECTED**
Can Synchronize Schemas	Not Set[2]	
BUDGETING		
CLIENT MATTER BUDGETS – ACTIVE INFORMATION	**RECOMMENDED**	**ELECTED**
Can Create Client Matter Budgets	Not Set[2]	
Can Delete Client Matter Budgets	Not Set[2]	
Can Edit Client Matter Budgets	Not Set[2]	
Can View Client Matter Budgets	Grant	
GENERAL LEDGER BUDGETS–ACTIVEINFORMATION	**RECOMMENDED**	**ELECTED**
Can Create General Ledger Budgets	Not Set[2]	
Can Delete General Ledger Budgets	Not Set[2]	
Can Edit General Ledger Budgets	Not Set[2]	
Can View General Ledger Budgets	Grant	
OTHER – ACTIVE INFORMATION	**RECOMMENDED**	**ELECTED**
Can Manage Payroll	Not Set[2]	
Can View Archived Budgets	Not Set[2]	
TIMEKEEPER BUDGETS – ACTIVE INFORMATION	**RECOMMENDED**	**ELECTED**
Can Create Timekeeper Budgets	Not Set[2]	
Can Delete Timekeeper Budgets	Not Set[2]	
Can Edit Timekeeper Budgets	Not Set[2]	
Can View Timekeeper Budgets	Grant	
PERSONALIZE REPORTS		
GENERAL – ACTIVE INFORMATION	**RECOMMENDED**	**ELECTED**
Can Use Personalize Reports	Not Set[2]	
CLIENT/MATTER INQUIRY		
FIELD ACCESS PERMISSIONS – MYJURIS	**RECOMMENDED**	**ELECTED**
Can Set Field Access Permissions	Not Set[2]	
GENERAL – MYJURIS	**RECOMMENDED**	**ELECTED**
Can Use Client Matter Inquiry	Not Set[2]	
INQUIRY PERMISSIONS – MYJURIS	**RECOMMENDED**	**ELECTED**
Can Use All Bills and A/R Adjustments Inquiry	Not Set[2]	
Can Use Bills Inquiry	Not Set[2]	
Can Use Bills Unpaid Bills Inquiry	Not Set[2]	
Can Use Client Details Address Inquiry	Grant	
Can Use Client Details Inquiry	Grant	
Can Use Client Details Note Card Inquiry	Grant	
Can Use Client Details UDFs Inquiry	Grant	
Can Use Expenses A/R Allocations Inquiry	Grant	
Can Use Expenses Billed Details Inquiry	Grant	

Can Use Expenses Inquiry	Grant	
Can Use Expenses Unbilled Details Inquiry	Grant	
Can Use Fees A/R Allocations Inquiry	Not Set[1]	
Can Use Fees Billed Details Inquiry	Grant[4]	
Can Use Fees Inquiry	Grant	
Can use Fees Unbilled Details Inquiry	Grant[4]	
Can Use General A/R Inquiry	Grant[4]	
Can Use General Inquiry	Grant	
Can Use General Ledger History Inquiry	Grant[4]	
Can Use Matter Details Address Inquiry	Grant	
Can Use Matter Details Inquiry	Grant	
Can Use Matter Details Note Card Inquiry	Grant	
Can Use Matter Details UDFs Inquiry	Grant	
Can Use Receipts All Receipts Inquiry	Not Set[1]	
Can Use Receipts Inquiry	Not Set[1]	
Can Use Receipts Prepaid Receipts Inquiry	Not Set[1]	
Can Use Trust All Banks Inquiry	Not Set[1]	
Can Use Trust Inquiry	Not Set[1]	
Can Use Trust Ledger Inquiry	Not Set[1]	
CONFLICT INQUIRY		
GENERAL – MYJURIS	**RECOMMENDED**	**ELECTED**
Can Use Conflict	Grant	
SETTINGS – MYJURIS	**RECOMMENDED**	**ELECTED**
Days to Retain Searches	Not Set[2]	
Search Billed Expense Narrative	Not Set[2]	
Search Billed Expense Note	Not Set[2]	
Search Billed Time Narrative	Not Set[2]	
Search Billed Time Note	Not Set[2]	
Search Description	Not Set[2]	
Search Text	Not Set[2]	
Search Unbilled Expense Narrative	Not Set[2]	
Search Unbilled Expense Note	Not Set[2]	
Search Unbilled Time Narrative	Not Set[2]	
Search Unbilled Time Note	Not Set[2]	
Search Unposted Expense Narrative	Not Set[2]	
Search Unposted Expense Note	Not Set[2]	
Search Unposted Time Narrative	Not Set[2]	
Search Unposted Time Note	Not Set[2]	
VIEWER		
GENERAL – ACTIVE INFORMATION	**RECOMMENDED**	**ELECTED**
Can View Dashboards	Grant	

DESIGNER		
General – Active Information	**Recommended**	**Elected**
Can Copy Published Dashboard	Not Set[2]	
Can Create Dashboard	Not Set[2]	
Can Create Dashboard Page	Not Set[2]	
Can Delete Dashboard Page	Not Set[2]	
Can Delete In-Progress Dashboard	Not Set[2]	
Can Delete Published Dashboard	Not Set[2]	
Can Edit Dashboard	Not Set[2]	
Can Edit Dashboard Page	Not Set[2]	
Can Publish Dashboard	Not Set[2]	
Override Team Restrictions	Not Set[2]	
Import/Export – Active Information	**Recommended**	**Elected**
Can Export Dashboard	Not Set[2]	
Can Import Dashboard	Not Set[2]	
METRICS		
General – Active Information	**Recommended**	**Elected**
Can Publish Metrics	Not Set[2]	
Can Use Metrics	Not Set[2]	
Library – Active Information	**Recommended**	**Elected**
Can Crete Metric Library	Not Set[2]	
Can Delete Metric Library	Not Set[2]	
Can Export Metric Library	Not Set[2]	
Can Import Metric Library	Not Set[2]	
Metric – Active Information	**Recommended**	**Elected**
Can Create Metric	Not Set[2]	
Can Delete Metric	Not Set[2]	
Can Edit Metric	Not Set[2]	
Can Execute Metric	Not Set[2]	
ALERTS		
General – Active Information	**Recommended**	**Elected**
Can Create Alerts	Not Set[2]	
Can Delete Alerts	Not Set[2]	
Can View Alerts	Grant	
Import/Export – Active Information	**Recommended**	**Elected**
Can Export Alert Templates	Not Set[2]	
Can Import Alert Templates	Not Set[2]	
Log – Active Information	**Recommended**	**Elected**
Can View Alert Logs	Not Set[2]	
Templates – Active Information	**Recommended**	**Elected**
Can Create Alert Templates	Not Set[2]	

Can Delete Alert Templates	Not Set[2]	
Can View Alert Templates	Not Set[2]	

[1] Setting this function to Grant exposes Rates and Amount values. For firms with sensitivity to Rates and Amounts, It is recommended to set the firm level permission for this item as Not Set, in effect disabling this item for the entire firm. You may elect to establish one or more groups of users who should have access to this area (such as the RateAmt group used in the recommendations); then Grant this function at the group level.

[2] This function is administrative in nature. It is recommended to set the firm level permission for this item as Not Set, in effect disabling this item for the entire firm. You may elect to establish a group of administrative-level users and Grant this function for that Group.

[3] If your firm uses an approval process for time and/or expense, you MUST Grant access to this feature in order for the users to be able to view rejection notes that might be included on the attachment tab. Otherwise you may elect to set this item to Not Set if the Attachments tab on time and/or expense is not used at your firm.

[4] Once you grant access to this area – you have exposed some rate and amount values. Access to these specific fields can be further limited in the Inquiry Field Permissions area, if needed.

Group Permissions (> 

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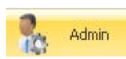
Before you can set Permissions at the Group level, a Group must be defined. Refer to Page 2 of this document for information on how to define a team. Based on the recommendations in this document, you would have defined the following Groups:

GROUPS		
GROUP NAME	**MEMBERS**	**WHAT TO GRANT**
Admin	Add SMGR and all Administrative Users for MyJuris (Juris Suite)	Grant anything set to Not Set[2] in Firm Permissions
RateAmt	Add all Partners and others in your firm who allowed to view items that include Rates and Amounts. If your firm does not have sensitivity to Rates and Amounts, anything defined as Not Set[1] can simply be granted at the FIRM level and this group is not needed.	Grant anything set to Not Set[1] in Firm Permissions

User Permissions (> 

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User permissions should not be required if proper Firm and Group permissions have been established. However, if you have a user within a group who should have a specific setting that differs from the group, you may do so at the user level.

Firm Settings (> Admin > Firm Settings)

FIRM		
This item has no settings		
MY VIEWS		
This item has no settings		
MY CALENDAR		
This item has no settings		
MY WEBLINKS		
This item has no settings		
MY TIME		
Batch Settings	**Recommended**	**Elected**
Batch Frequency	One Batch per User per day (Max 200)	
Batch Import Sort Order	Timekeeper, Date	
Batch Status	Unposted	
MY EXPENSES		
Batch Settings	**Recommended**	**Elected**
Batch Frequency	One Batch per User per day (Max 200)	
Batch Import Sort order	Entry Date	
Batch Status	Unposted	
DISTRIBUTIONS		
E-mail	**Recommended**	**Elected**
From E-mail Address		
Smtp Host Address		
General	**Recommended**	**Elected**
Webserver Url		
CLIENT/MATTER INQUIRY		
This item has no settings		
CONFLICT INQUIRY		
Conflict Inquiry	**Recommended**	**Elected**
Days to Retain Searches	7 (Or Longer depending on client/matter intake process)	
Conflict Archive	**Recommended**	**Elected**
Search Description	True	
Search Text	True	
Conflict Search Fields	**Recommended**	**Elected**
Address	Firm Discretion	
Client	Firm Discretion	
Matter	Firm Discretion	

Vendor	Firm Discretion	
Expense Narrative	**Recommended**	**Elected**
Search Billed Expense Narrative	Firm Discretion	
Search Unbilled Expense Narrative	Firm Discretion	
Search Unposted Expense Narrative	Firm Discretion	
Expense Note	**Recommended**	**Elected**
Search Billed Expense Note	Firm Discretion	
Search Unbilled Expense Note	Firm Discretion	
Search Unposted Expense Note	Firm Discretion	
Time Narrative	**Recommended**	**Elected**
Search Billed Time Narrative	Firm Discretion	
Search Unbilled Time Narrative	Firm Discretion	
Search Unposted Time Narrative	Firm Discretion	
Time Note	**Recommended**	**Elected**
Search Billed Time Note	Firm Discretion	
Search Unbilled Time Note	Firm Discretion	
Search Unposted Time Note	Firm Discretion	
VIEWER		
Misc	**Recommended**	**Elected**
Dashboard server URL	Firm Discretion	
DESIGNER		
Misc	**Recommended**	**Elected**
Dashboard server URL	Firm Discretion	
METRICS		
This item has no settings		
ALERTS		
E-mail	**Recommended**	**Elected**
From E-mail Address	Firm Discretion	
Smtp Host Address	Firm Discretion	

User Settings (> Admin > User Settings)

USER NAME		
Cache Settings	**Recommended**	**Elected**
Lookup List Cache Size	500	
MY VIEWS		
This item has no settings.		
MY CALENDAR		
Heat Map	**Recommended**	**Elected**
Heat Map Style	Hours Worked	

Heat Map Colors	Recommended	Elected
High Color	Firm Discretion	
Low Color	Firm Discretion	
Target Color	Firm Discretion	
Heat Map Targets – Amount to Bill	**Recommended**	**Elected**
Amount to Bill – High	1.25X	
Amount to Bill – Low	.75 X	
Amount to Bill – Target	X	
Heat Map Targets – Amount Worked	**Recommended**	**Elected**
Amount Worked – High	1.25X	
Amount Worked – Low	.75 X	
Amount Worked – Target	X	
Heat Map Targets – Billable Rate	**Recommended**	**Elected**
Billable Rate – High	1.25X	
Billable Rate – Low	.75 X	
Billable Rate – Target	X	
Heat Map Targets – Effective Rate	**Recommended**	**Elected**
Effective Rate – High	1.25X	
Effective Rate – Low	.75 X	
Effective Rate – Target	X	
Heat Map Targets – Hours to Bill	**Recommended**	**Elected**
Hours to Bill – High	1.25X	
Hours to Bill – Low	.75 X	
Hours to Bill – Target	X	
Heat Map Targets – Hours Worked	**Recommended**	**Elected**
Hours Worked – High	1.25X	
Hours Worked – Low	.75 X	
Hours Worked – Target	X	
MY WEBLINKS		
This item has no settings		
MY TIME		
Auto New Settings	**Recommended**	**Elected**
Duplicate Activity Code	False	
Duplicate Client/Matter	False	
Duplicate Date	True	
Duplicate Task Code	False	
Duplicate Timekeeper	True	
Calendar Settings	**Recommended**	**Elected**
Calendar Time Slot Interval	Firm Discretion	
Editor Settings	**Recommended**	**Elected**
Editor Start-up Field	Date	
Transfer Time When Time Entry is Saved	Firm Discretion	

SUBMITTAL SETTINGS	**RECOMMENDED**	**ELECTED**
Approver for Time	Firm Discretion	
Submit on Cache Synchronize	True	
TIMER SETTINGS	**RECOMMENDED**	**ELECTED**
Allow Multiple Timers	False	
Timer Rounding Factor	Firm Discretion	
MY EXPENSES		
AUTO NEW SETTINGS	**RECOMMENDED**	**ELECTED**
Duplicate Client/Matter	False	
Duplicate Date	True	
Duplicate Expense Code	True	
Duplicate Incurred By	False	
Duplicate Task Code	False	
EDITOR SETTINGS	**RECOMMENDED**	**ELECTED**
Editor Startup up Field	Entry Date	
SUBMITTAL SETTINGS	**RECOMMENDED**	**ELECTED**
Approver for Expense	Firm Discretion	
Submit on Cache Synchronize	True	
DISTRIBUTIONS		
This item has no settings		
CLIENT MATTER INQUIRY		
LAYOUT SETTINGS	**RECOMMENDED**	**ELECTED**
Show Default Layouts	True	
CONFLICT INQUIRY		
This item has no settings		
VIEWER		
This item has no settings		
DESIGNER		
This item has no settings		
METRICS		
This item has no settings		
ALERTS		
This item has no settings		

Cache Settings (> Admin > Cache Settings)

CACHE SETTINGS		
SETTINGS	**RECOMMENDED**	**ELECTED**
Cache Enabled	True	

Save Information to Event Log	True	
Cache Synchronization Interval in Minutes	60	

Account Categories (> Admin > Account Categories)

Basic categories are supplied. The firm can use these categories, add new categories or define their own. Selections made here are all based on firm's discretion. The default categories are shown below:

ASSETS		
CODE	**DESCRIPTION**	**NOTES**
A01	Cash and Cash Equivalents	
A02	Current Assets	
A03	Other Current Assets	
A04	Fixed Assets	
A05	Buildings	
A06	Furniture & Fixtures	
A07	Equipment	
LIABILITIES		
CODE	**DESCRIPTION**	
L01	Short Term Liabilities	
L02	Long Term Liabilities	
EQUITY		
CODE	**DESCRIPTION**	
EQ01	Capital	
EQ02	Draws	
EQ03	Fringe Benefits	
EQ04	Retained Earnings	
REVENUE		
CODE	**DESCRIPTION**	
I01	Fee Income	
I02	Client Reimbursements	
I03	Other Income	
EXPENSES		
CODE	**DESCRIPTION**	
E01	Compensation	
E02	Operating Expense	
E06	Business Development	
E15	Taxes	
E05	Technology and Information Systems	
E03	Occupancy	

E09	Library	
E13	Depreciation	
E07	Recruiting	
E10	Professional Services	
E12	Client Expenses	
E11	Insurance	
E04	Office Supplies	
E08	Continuing Education	
E14	Other	

Chart of Accounts (Juris > Admin > Chart Of Accounts)

The firm's entire chart of accounts will be listed here. The firm can assign categories based on those accepted or defined under Account Categories (above). Selections made here are all based on firm's discretion. An example is shown below:

CHART OF ACCOUNTS		
ACCOUNT NUMBER	DESCRIPTION	CATEGORY
1001	Cash – Operating	A01/Cash & Cash Equivalents
1002	Cash – Trust	A01/Cash & Cash Equivalents
1003	Cash - Petty	A01/Cash & Cash Equivalents
…etc		

Report Administration (Juris > Admin > Report Administration)

Out of the box – all Active Information reports are restricted. To allow a user to print a report themselves (including selecting any parameters for that report) then that report must be moved from the Restricted Reports list to the Viewable Reports list.

If an administrator distributes a report to an individual then that individual will be able to view that instance of the report even if that user does not have that report on their Viewable Reports list.

A report should only be added to the Viewable Reports list if that user should have rights to run that report on demand and select any parameter changes as desired for that report at any time.

Time Entry/Expense Entry – Field Access Permissions

(> My Time / My Expenses > Field Access)

Select a User name. Options are Active/Enabled/Disabled/Hidden.

- Active: The field is present in the screen. When the user 'tabbs' through the form this field is activated when the tab reaches the field.
- Enabled: The field is present in the screen. When the user 'tabbs' through the form this field is skipped when the tab reaches the field. The user can still click into the field with their mouse and make edits.
- Disabled: The field is present in the screen but the field is completely disabled. The user cannot change the value of that field.
- Hidden: The field is not shown in the screen at all and is unavailable for editing.

Firm's selections in this area can vary widely. The recommendations below are one common way of establishing these permissions. Keep in mind that these permissions are most restrictive. This means that the most stringent setting in place that applies to a user will be observed. For example, notice that the Amount field shows as Active at the Firm level, Active at the User level but Hidden for the NoRateAmt Group. That means that for those in the NoRateAmt group this field will not be shown but all others will see this field.

TIME ENTRY FIELDS			
FIELD	**FIRM**	**GROUP(S)**	**USER**
Activity Code	Active	Active	Active
Amount	Active	Hidden for NoRateAmt Group	Active
Billable	Enabled	Active	Active
Budget Phase	Hidden/Firm Discretion	Active	Active
Client Matter	Active	Active	Active
Code 1	Hidden/Firm Discretion	Active	Active
Code 2	Hidden/Firm Discretion	Active	Active
Code 3	Hidden/Firm Discretion	Active	Active
Creator	Disabled	Disabled	Disabled
Entry Date	Active	Active	Active
Hours to Bill	Active	Hidden for NoRateAmt Group	Active
Hours Worked	Active	Active	Active
Last Modified By	Disabled	Disabled	Disabled
Narrative	Active	Active	Active
Note	Active	Active	Active
Owner	Disabled	Disabled	Disabled
Rate	Active	Hidden for NoRateAmt Group	Active
Start Time	Active	Active	Active
Task Code	Active	Active	Active
Timekeeper	Active	Active	Active

EXPENSE ENTRY FIELDS			
FIELD	**FIRM**	**GROUP(S)**	**USER**
Amount	Active	Hidden for NoRateAmt Group	Active
Budget Phase	Hidden/Firm Discretion	Active	Active
Client Matter	Active	Active	Active
Code 1	Hidden/Firm Discretion	Active	Active
Code 2	Hidden/Firm Discretion	Active	Active
Code 3	Hidden/Firm Discretion	Active	Active
Creator	Disabled	Disabled	Disabled
Entry Date	Active	Active	Active
Expense Code	Active	Active	Active
Incurred by	Active	Active	Active
Last Modified By	Disabled	Disabled	Disabled
Multiplier	Active	Active	Active
Narrative	Active	Active	Active
Note	Active	Active	Active
Owner	Disabled	Disabled	Disabled
Summarize	Enabled	Active	Active
Task Code	Active	Active	Active

Client/Matter Inquiry – Field Permissions; Field Access Permissions

(> Client/Matter Inquiry > Field Permissions > Field Access Permissions)

Select a User Name. Options are True/False. These settings are most restrictive. So if a FALSE exists on any level that applies to that user, then the FALSE will be observed.

GENERAL			
A/R	**FIRM**	**GROUP(S)**	**USER**
Balance Due	True	False[1]	True
Bill Number	True	False[2]	True
Cash Expense Adjusted	True	False[1]	True
Cash Expense Billed	True	False[1]	True
Cash Expense Received	True	False[1]	True
Code	True	True	True
Date	True	True	True
Expenses	True	False[1]	True
Fee Adjusted	True	False[1]	True
Fee Billed	True	False[1]	True
Fee Pending	True	False[1]	True
Fee Received	True	False[1]	True

Fees	True	False[1]	True
Interest Adjusted	True	False[1]	True
Interest Billed	True	False[1]	True
Interest Pending	True	False[1]	True
Interest Received	True	False[1]	True
Ledger History Link	True	True	True
NickName	True	True	True
Noncash Expense Adjusted	True	False[1]	True
Noncash Expense Billed	True	False[1]	True
Noncash Expense Pending	True	False[1]	True
Noncash Expense Received	True	False[1]	True
Pending Cash Expense	True	False[1]	True
Pending Flag	True	True	True
Surcharge Adjusted	True	False[1]	True
Surcharge Billed	True	False[1]	True
Surcharge Pending	True	False[1]	True
Surcharge Received	True	False[1]	True
Surchg/Tax/Int	True	False[1]	True
Surchg/Tax/Int	True	False[1]	True
Tax1 Billed	True	False[1]	True
Tax1 Pending	True	False[1]	True
Tax1 Received	True	False[1]	True
Tax2 Adjusted	True	False[1]	True
Tax2 Billed	True	False[1]	True
Tax2 Pending	True	False[1]	True
Tax2 Received	True	False[1]	True
Tax3 Adjusted	True	False[1]	True
Tax3 Billed	True	False[1]	True
Tax3 Pending	True	False[1]	True
Tax3 Received	True	False[1]	True
Ledger History	**Firm**	**Group(s)**	**User**
Balance	True	False[1]	True
Bill Number	True	False[2]	True
Cash Amount	True	False[1]	True
Cash Expense	True	False[1]	True
Code	True	True	True
Comment	True	True	True
Date	True	True	True
Expenses	True	False[1]	True
Fees	True	False[1]	True
Interest	True	False[1]	True
NickName	True	True	True

Noncash Expense Amount	True	False[1]	True
Period Number	True	True	True
Period Year	True	True	True
Surcharge	True	False[1]	True
Surchg/Tax/Int	True	False[1]	True
System Number	True	True	True
Taxes1	True	False[1]	True
Taxes2	True	False[1]	True
Taxes3	True	False[1]	True
Type	True	True	True
FEES			
UNBILLED DETAILS	**FIRM**	**GROUP(S)**	**USER**
Activity Code	True	True	True
Actual Hours Worked	True	True	True
Amount	True	False[1]	True
Amount at Standard Rate	True	False[1]	True
Amount Source	True	True	True
Batch Number	True	True	True
Batch Number	True	True	True
Billable Flag	True	True	True
Budget Phase	True	True	True
Code	True	True	True
Code1	True	True	True
Code2	True	True	True
Code3	True	True	True
Date	True	True	True
Employee ID	True	True	True
Fee Schedule Code	True	True	True
Hours Source	True	True	True
Hours To Bill	True	True	True
Initials	True	True	True
Name	True	True	True
Narrative	True	True	True
NickName	True	True	True
Period Number	True	True	True
Period Year	True	True	True
Post Date	True	True	True
Post In	True	True	True
Rate	True	False[1]	True
Rate Source	True	True	True
Record Number	True	True	True
Standard Rate	True	False[1]	True

Task Code	True	True	True
Unbilled Time ID	True	True	True
Billed Details	**Firm**	**Group(s)**	**User**
Activity Code	True	True	True
Actual Hours Worked	True	True	True
Amount	True	False[1]	True
Amount at Standard Rate	True	False[1]	True
Amount On Bill	True	False[1]	True
Amount Source	True	False[1]	True
Batch Number	True	True	True
Bill Note	True	True	True
Bill Number	True	False[2]	True
Billable Flag	True	True	True
Budget Phase	True	True	True
Code	True	True	True
Code1	True	True	True
Code2	True	True	True
Code3	True	True	True
Date	True	True	True
Employee ID	True	True	True
Fee Schedule Code	True	True	True
Hours On Bill	True	True	True
Hours Source	True	True	True
Name	True	True	True
Narrative	True	True	True
Period Number	True	True	True
Period Year	True	True	True
Post Date	True	True	True
Post In	True	True	True
Rate	True	False[1]	True
Rate On Bill	True	False[1]	True
Rate Source	True	True	True
Record Number	True	True	True
Standard Rate	True	False[1]	True
Status On Bill	True	True	True
Task Code	True	True	True
Worked Timekeeper	True	True	True
A/R Allocations	**Firm**	**Group(s)**	**User**
Write-off	True	False[1]	True
EXPENSES			
Unbilled Details	**Firm**	**Group(s)**	**User**
Amount	True	False[1]	True

Amount Source	True	True	True
Authorized By	True	True	True
Auto Suppress	True	True	True
Batch Number	True	True	True
Bill Note	True	True	True
Budget Phase	True	True	True
Budget Task Code	True	True	True
Code	True	True	True
Code1	True	True	True
Code2	True	True	True
Code3	True	True	True
Date	True	True	True
Expense Code	True	True	True
Expense Schedule	True	True	True
Multiplier	True	True	True
Narrative	True	True	True
NickName	True	True	True
Period Number	True	True	True
Period Year	True	True	True
Post Date	True	True	True
Post In	True	True	True
Record Number	True	True	True
Summarize	True	True	True
Unbilled Expense ID	True	True	True
Units	True	True	True
BILLED DETAILS	**FIRM**	**GROUP(S)**	**USER**
Amount	True	False[1]	True
Amount On Bill	True	False[1]	True
Amount Source	True	True	True
Authorized By	True	True	True
Batch Number	True	True	True
Bill Note	True	True	True
Bill Number	True	False[2]	True
Billed Expense ID	True	True	True
Budget Phase	True	True	True
Budget Task Code	True	True	True
Code	True	True	True
Code1	True	True	True
Code2	True	True	True
Code3	True	True	True
Date	True	True	True
Expense Code	True	True	True

Expense Schedule	True	True	True
Multiplier	True	True	True
Narrative	True	True	True
NickName	True	True	True
Period Number	True	True	True
Period Year	True	True	True
Post Date	True	True	True
Post In	True	True	True
Record Number	True	True	True
Status On Bill	True	True	True
Summarize	True	True	True
Units	True	True	True
Units On Bill	True	True	True
A/R ALLOCATIONS	**FIRM**	**GROUP(S)**	**USER**
AR Expense ID	True	True	True
Balance	True	False[1]	True
Bill Date	True	True	True
Bill Number	True	False[2]	True
Billed	True	False[1]	True
Billed Value	True	False[1]	True
Code	True	True	True
Expense Code	True	True	True
Expense Code Type	True	True	True
NickName	True	True	True
Paid	True	False[1]	True
Pending Amount	True	False[1]	True
Write-off	True	False[1]	True
BILLS			
UNPAID BILLS	**FIRM**	**GROUP(S)**	**USER**
A/R Balance Due	True	False[1]	True
Bill Date	True	True	True
Bill Number	True	False[2]	True
Cash Expense Billed	True	False[1]	True
Cash Expense Received	True	False[1]	True
Code	True	True	True
Fee Adjusted	True	False[1]	True
Fee Billed	True	False[1]	True
Fee Pending	True	False[1]	True
Fee Received	True	False[1]	True
Interest Adjusted	True	False[1]	True
Interest Billed	True	False[1]	True
Interest Pending	True	False[1]	True

Interest Received	True	False[1]	True
Ledger History Link	True	True	True
NickName	True	True	True
Noncash Expense Adjusted	True	False[1]	True
Noncash Expense Billed	True	False[1]	True
Noncash Expense Pending	True	False[1]	True
Noncash Expense Received	True	False[1]	True
Pending Cash Expense	True	False[1]	True
Pending Flag	True	True	True
Surcharge Adjusted	True	False[1]	True
Surcharge Billed	True	False[1]	True
Surcharge Pending	True	False[1]	True
Surcharge Received	True	False[1]	True
Tax1 Adjusted	True	False[1]	True
Tax1 Billed	True	False[1]	True
Tax1 Pending	True	False[1]	True
Tax1 Received	True	False[1]	True
Tax2 Adjusted	True	False[1]	True
Tax2 Billed	True	False[1]	True
Tax2 Pending	True	False[1]	True
Tax2 Received	True	False[1]	True
Tax3 Adjusted	True	False[1]	True
Tax3 Billed	True	False[1]	True
Tax3 Pending	True	False[1]	True
Tax3 Received	True	False[1]	True
ALL BILLS AND A/R ADJ.	**FIRM**	**GROUP(S)**	**USER**
A/R Balance Due	True	False[1]	True
Amount	True	False[1]	True
Bill Date	True	True	True
Bill Number	True	False[2]	True
Code	True	True	True
Comment	True	True	True
Type	True	True	True
RECEIPTS			
ALL RECEIPTS	**FIRM**	**GROUP(S)**	**USER**
Bill Number	True	False[2]	True
Cash Amount	True	False[1]	True
Cash Expense	True	False[1]	True
Code	True	True	True
Comment	True	True	True
Date	True	True	True
Fees	True	False[1]	True

Interest	True	False[1]	True
NickName	True	True	True
Noncash Expense Amount	True	False[1]	True
Period Number	True	True	True
Period Year	True	True	True
Surcharge	True	False[1]	True
Surcharge	True	False[1]	True
Taxes1	True	False[1]	True
Taxes2	True	False[1]	True
Taxes3	True	False[1]	True
Type	True	True	True
PREPAID RECEIPTS	**FIRM**	**GROUP(S)**	**USER**
Bill Number	True	False[2]	True
Cash Amount	True	False[1]	True
Cash Expense	True	False[1]	True
Code	True	True	True
Comment	True	True	True
Date	True	True	True
Fees	True	False[1]	True
Interest	True	False[1]	True
NickName	True	True	True
Noncash Expense Amount	True	False[1]	True
Period Number	True	True	True
Period Year	True	True	True
Surcharge	True	False[1]	True
Surcharge	True	False[1]	True
Taxes1	True	False[1]	True
Taxes2	True	False[1]	True
Taxes3	True	False[1]	True
Type	True	True	True
TRUST			
ALL BANKS	**FIRM**	**GROUP(S)**	**USER**
Adjustment	True	False[3]	True
Bank Code	True	False[3]	True
Code	True	False[3]	True
Deposits	True	False[3]	True
Payments	True	False[3]	True
Period Number	True	False[3]	True
Period Year	True	False[3]	True
LEDGER	**FIRM**	**GROUP(S)**	**USER**
Amount	True	False[3]	True
Balance	True	False[3]	True

Bank Code	True	False[3]	True
Check Number	True	False[3]	True
Code	True	False[3]	True
Date	True	False[3]	True
Memo	True	False[3]	True
NickName	True	False[3]	True
Trust Ledger ID	True	False[3]	True
Trust Ledger Sys Number	True	False[3]	True
Type	True	False[3]	True
CLIENT DETAILS			
ADDRESS	**FIRM**	**GROUP(S)**	**USER**
Address	True	True	True
City	True	True	True
Contact	True	True	True
Fax Number	True	True	True
Name	True	True	True
NickName	True	True	True
Phone	True	True	True
State	True	True	True
Zip	True	True	True
UDFS	**FIRM**	**GROUP(S)**	**USER**
Varies by Firm	True	True	True
NOTE CARDS	**FIRM**	**GROUP(S)**	**USER**
Note Index	True	True	True
Note Text	True	True	True
MATTER DETAILS			
ADDRESS	**FIRM**	**GROUP(S)**	**USER**
Address	True	True	True
City	True	True	True
Contact	True	True	True
Fax Number	True	True	True
Name	True	True	True
NickName	True	True	True
Phone	True	True	True
State	True	True	True
Zip	True	True	True
UDFS	**FIRM**	**GROUP(S)**	**USER**
Varies by Firm	Varies	Varies	Varies
NOTE CARDS	**FIRM**	**GROUP(S)**	**USER**
Note Index	True	True	True
Note Text	True	True	True

1 This item exposes rates or amounts. If your firm has sensitivity to rates or amounts then this item should be set

to FALSE for the NoRateAmt group. It can remain True for other groups that are allowed to see Rates or Amounts.

1 This item exposes a bill number. Any field containing a bill number can be right-clicked and the archived image of the client bill can be opened and viewed. This field should be set to false for any group that should not have access to the archived bill image.

3 This item should be set to false for any user that should not see trust bank account detail.

Client/Matter Inquiry – Field Permissions; Client Lookup Permissions

(> Client/Matter Inquiry > Field Permissions > Client Lookup Permissions)

Select a User Name. By default each user will be set to ***Allow user to see all clients*** and all other options will be disabled. Once the checkmark beside ***Allow user to see all clients*** is removed , the other options will become enabled. When more than one of the options is selected, the system treats those multiple selections as an OR clause (where when any of the criteria are met, then the Client (all matters) can be displayed) not an AND clause (where all of the criteria myst be met before the Client (all matters) can be displayed).

The Client Lookup Permissions allow a firm to limit timekeepers to view only the matters for particualr clients. There are no 'best practices' here because the settings needed will vary quite a bit based on each firm's sepcific needs. This section will explain how these Permisions function:

TIMEKEEPER TYPES

Options:

- Billing: Allows the administrator to grant access for the selected user to see Clients (all matters) where that user is defined as the Billing Timekeeper for that client.
- Originating: Allows the administrator to grant access for the selected user to see Clients (all matters) where that user is defined as an Originating Timekeeper for that client (keep in mind some firms allow more than one Originator).
- Responsible: Allows the administrator to grant access for the selected user to see Clients (all matters) where that user is defined as a Responsible Attorney for that client. (keep in mind, Juris allows more than one Responsible Attorney).

If the administrator selects more than one of the above options for a particular user, the system will display the Clients (all matters) where that user is either the Billing OR Originating OR Responsible timekeeper for the Client.

PRACTICE CLASSES

Allows the selected user to see Clients (all matters) where the Practice Class for that client is one of the Practice Classes selected. If the administrator selects more than one Practice Class, the system will display the Clients (all matters) where the Practice Class is any one of the selected Classes.

OFFICE CODES

Allows the selected user to see Clients (all matters) where the Office Code for that client is one of the Office Codes selected. If the administrator selects more than one Office Code, the system will display the Clients (all matters) where the Office Code is any one of the selected Offices.

CHOOSE SPECIFIC CLIENTS

Allows the selected user to see Clients (all matters) where the specific Client has been selected for inclusion in the list. This allows a firm to cherry-pick specific clients that a particular user may need to see.

This option also can be used to OMIT specific clients as well. For example, let's say that User Jane Smith works in the bankruptcy department and has been granted access to all – but the firm does not want her to view a particular Bankruptcy client, JonesNet. Notice how in the example below, the Bankruptcy class has been selected, then the JonesNet client was added in the Choose Specific Clients window and the checkmark beside that client has been removed. That tells the system that even if JonesNet is in the Bankruptcy class, this user should not see that Client.