



Juris to WORLD DOX Client Matter Sync

Version 1.2.2

Introduction

The Juris to WORLDOX Client Matter Sync program is designed to automate the transfer of Client and Matter codes from the Juris Time and Billing system to the WORLDOX Document Management system.

Once the WDJuris program is setup and configured it will monitor the Juris Client Matter tables for changes once every 60 seconds. When an existing Juris code is changed or a new Juris code is added that information will automatically be updated in your WORLDOX Client Matter tables.

This program is not designed to perform the initial transfer of all existing Client Matter codes from Juris to WORLDOX for a new install. The initial transfer will still need to be accomplished via a ASCII CSV file exported from Juris and then imported into WORLDOX via WAdmin.

System Requirements

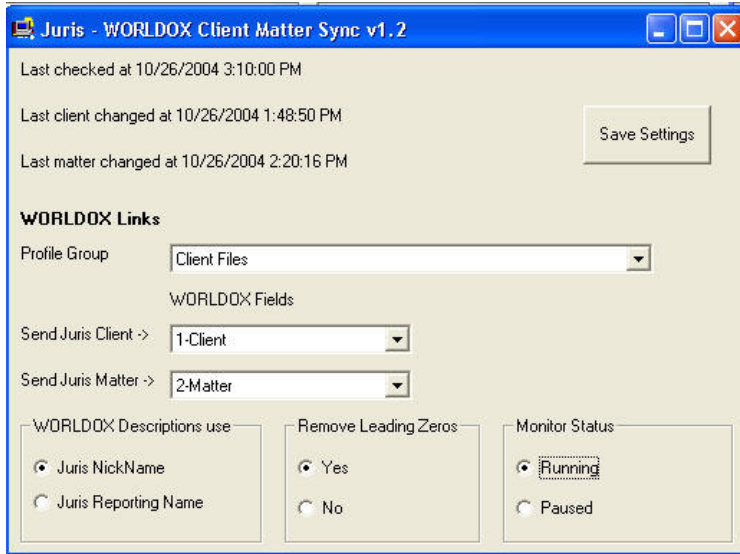
1. Juris 2.2x or higher, the Juris client must be installed on the workstation that you plan to run WDJuris.exe from
2. WORLDOX 2002 initial release or higher, the WORLDOX client must be installed and also must be running on the workstation that you plan to run WDJuris.exe from
3. WDAPI32.DLL dated 10/21/04 or later
4. Windows 2000 or XP as the PC Operating system

WDJuris.exe Installation

1. Ensure that the Juris Client 2.2x or higher is installed and configured on the workstation
2. Make sure you have your Juris Database set to be the default via the Juris License Manager
3. You need to have your Juris Change logs turned on - **SEE PAGE 4 of this document**
4. Ensure that the WORLDOX 2002 client is installed and configured on the workstation
5. Copy the WDJuris.exe file to the Juris client Program folder, typically C:\Program Files\Juris2
6. Check the Date of WDAPI32.DLL in your WORLDOX Program folder on your Server. If the DLL is older than 10/21/04, then replace it with the WDAPI32.DLL that was shipped with the WDJuris zip file. If you are going to replace your current WDAPI32.DLL with a newer one, first rename your current WDAPI32.DLL to WDAPI32.bak as a backup.
7. Create a shortcut on your Desktop for the WDJuris.exe program
8. Start the WORLDOX client, if the WORLDOX client is not running first the WDJuris program will fail to load
9. Start the WDJuris Program
10. Configure the WDJuris settings and the Save your Settings using the guidelines on the next page.

Errors

1. Unable to connect to Juris Database or retrieve Juris Data. – Ensure that the Juris client 2.2x or later is correctly installed on the workstation. Go into the Juris License Manager and verify that your Firms database is set as the default database and make sure you have the Juris Change logs turned on. – After verifying these settings, reboot your PC and try again. If the error still occurs then contact Juris Tech Support
2. WORLDOX Error on start of application, WDJuris Application Closes. – Make sure the WORLDOX client is running on your workstation prior to starting the WDJuris program. Verify the date of the WDAPI32.DLL file in your local WORLDOX program folder and your Windows folder to ensure they are dated 10/21/04 or later. If changes are required, reboot, restart the WORLDOX client then try loading WDJuris again. If it continues to fail contact WORLDOX Tech Support.



The Juris – WORLDOX Client Matter Sync Dialog settings

Profile Group – Select the WORLDOX Profile Group from the Dropdown list that you wish to transfer the Juris Client and Matter codes to.

Send Juris Client - After you have selected the WORLDOX Profile Group you will need to select which WORLDOX Field you want the Juris Client Codes to transfer to.

Send Juris Matter - After you have selected the WORLDOX Profile Group and Client Field you will need to select which WORLDOX Field you want the Juris Matter Codes to transfer to.

WORLDOX Descriptions use – Determines which Juris Client and Matter description field to use in the WORLDOX Client and Matter description fields.

Remove Leading Zeros - Determines if leading zeros on Juris Client and Matter numbers should be removed when transferred to WORLDOX. Setting the option to yes will result in a Matter code in Juris of “0004” to appear in WORLDOX as “4”. It is very important that you set this switch to reflect your current codes in WORLDOX. If your Matter codes in WORLDOX are currently showing up with leading zeros then you need to set this option to No. WORLDOX will not consider Matter “0004” and Matter “4” to be the same matter code within the WORLDOX System.

Monitor Status - When set to running, the program will check the Juris Client and Matter tables every 60 seconds for changes and then update the WORLDOX tables accordingly. When to set to Paused, the program is inactive.

Save Settings Button – Click on the Save Settings Button after you have selected the options for your installation. This will save your settings in the wdjuris.ini file for future use.

Juris Database Settings

In order for the WDJuris program to detect the changes in the Juris Client and Matter Tables you need to have the following settings on your Juris database. Failure to do this will show the last Client and Matter change dates with the year 1900 and no data will be transferred from Juris to WORLDOX.

Set the Default Juris Database

1. Start the Juris License Manager
2. Highlight your Firms Database
3. Make sure the Default Database checkbox is checked.
4. Save the changes

Turn on Juris Change Logs

1. Start the Juris Client and login using a Juris Admin ID
2. Go into the Setup and Manage Option
3. Click on the Change Mode Icon in the right hand portion of the screen
4. Set the Mode to Maintenance and then close out of the Change Mode Screen
5. Click on the Firm Options Icon in the right hand portion of the screen
6. Click on the MISC tab
7. Check the box for Use Change Logs
8. Exit out of the Juris Client

If you have any problems setting the Juris Database or change logs please contact Juris Technical Support.