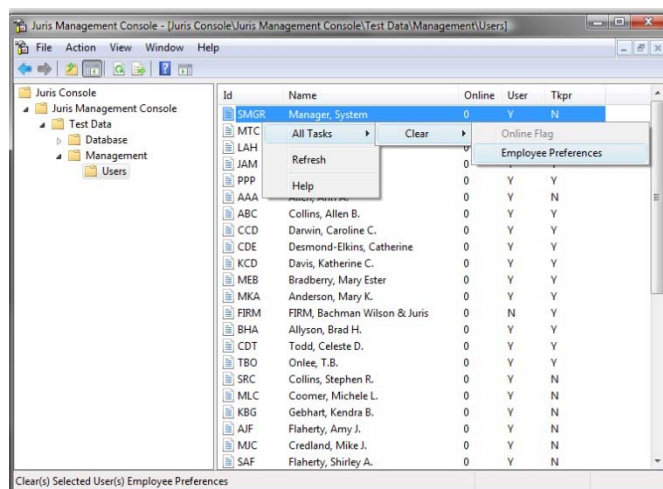


How to Clear Employee Preferences and the Effects

1. The user experiencing issues must exit Juris.
2. Open Juris Management Console on an Administrative workstation or the server
Start > Programs > Juris > Juris Administrative Tools > Juris Management Console
3. Expand the + or > beside Juris Management Console folder
 - a. expand the + or > beside your company name folder
 - b. expand the + or > beside Management folder and then left click the Users folder
 - c. locate the user in the right hand pane, left click to highlight the user name
 - d. then right click > all tasks > clear > employee preferences
(you will not see anything happen)



4. Close the Juris Management Console, have the user log back into Juris and verify that the issue is resolved.

Effects of Clearing Employee Preferences

When clearing Employee preferences it should be noted that certain user preferences are reset to default values and these can include but are not limited to:

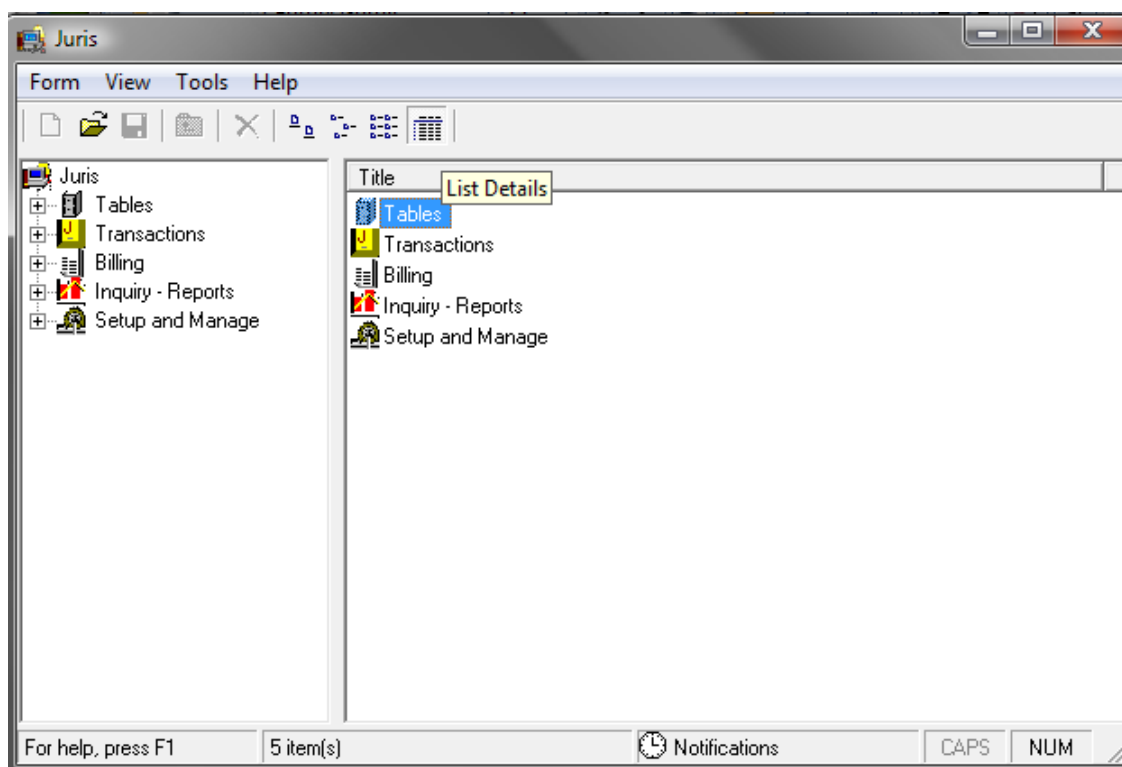
Views of Juris Menus

Explorer View of Juris reset to Single Pane

- To put in Explorer view, go to Form > Explore then close out of the single pane window by using the RED X in the upper right hand corner of window

The view each of the different areas of Juris ie: menus and whether listed in large icons, small icons or list view are reset to large icons

- To modify, go to View and choose the desired option or click the toolbar icon



Views in Transactions that are effected**Journal Entries:**

- Resets to Default of “View by Control Number”

The screenshot shows the 'Journal Entries' window. The 'View' menu is open, and 'View by Control Number' is selected, which is highlighted in yellow. Other options in the menu include 'View All Items'. The window also shows a toolbar, a status bar, and a table with columns: Account, Description, Debit, Credit, Document, and Reference. The first row of the table has the value '1' in the Account column.

Time and Expense Entries:

- (Accessed by opening a new transaction type and going to Tools > Preferences)
- All previously selected preferences will remain.

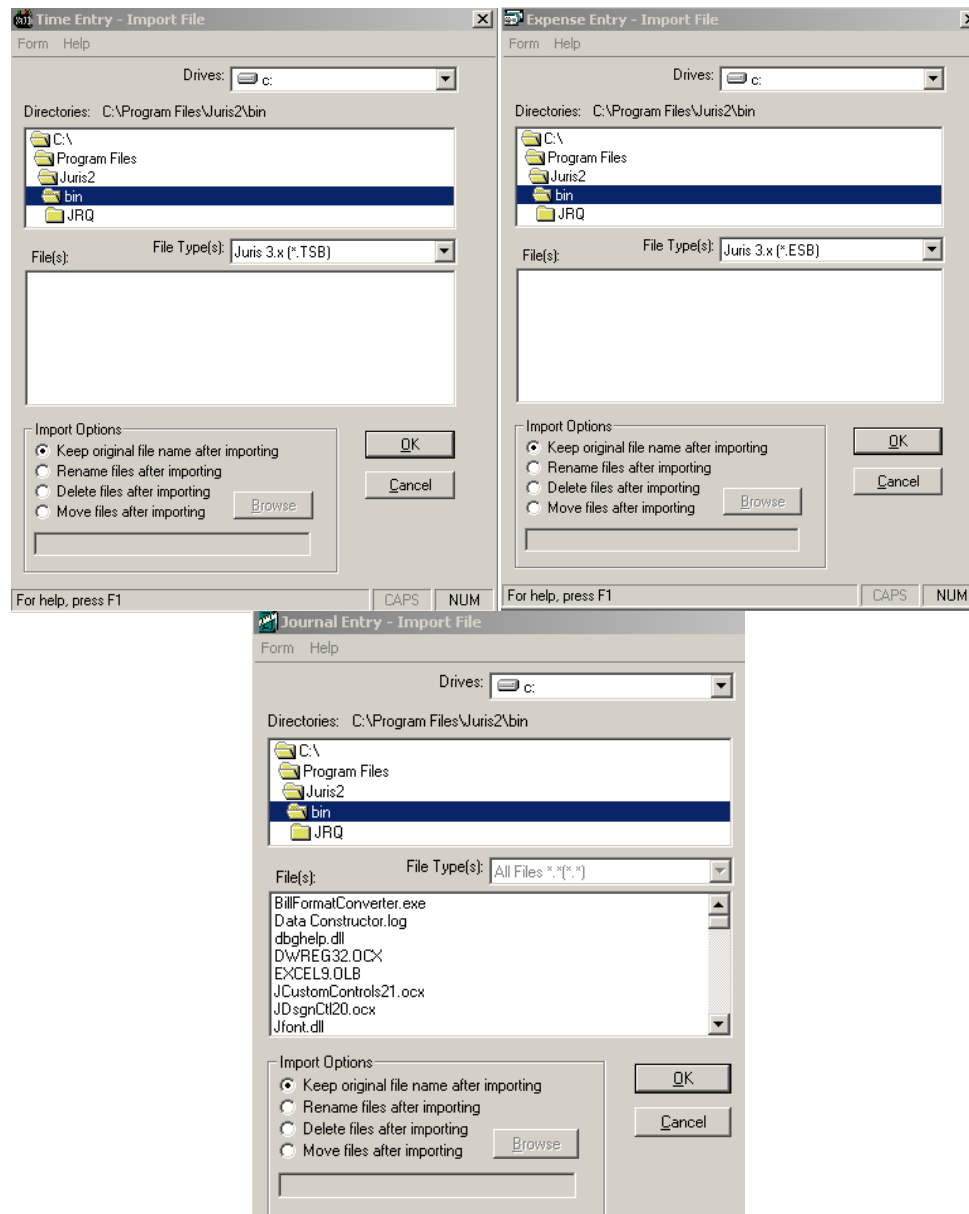
Note: The specific data that was keyed in the fields for auto-duplication will need to be re-entered.

The image shows two side-by-side screenshots of preference windows. The left window is 'SMGR's Time Entries Preferences' and the right is 'SMGR's Expense Entries Preferences'. Both windows have a 'Form' tab selected. The 'Time Entries Preferences' window shows the following checked options: 'Use Continuous New mode', 'Auto-duplicate Date', 'Auto-duplicate Timekeeper', and 'Auto-duplicate Client / Matter'. The 'Expense Entries Preferences' window shows the following checked options: 'Use Continuous New mode', 'Auto-duplicate Date', and 'Auto-duplicate Client / Matter'. Both windows also have 'Auto-duplicate Task Code', 'Auto-duplicate Activity Code', and 'Use Note field' unchecked.

Time, Expense and Journal entry import options will also need to be reset.

- (Accessed by going to transactions > time, expense or journal entry > tools > import

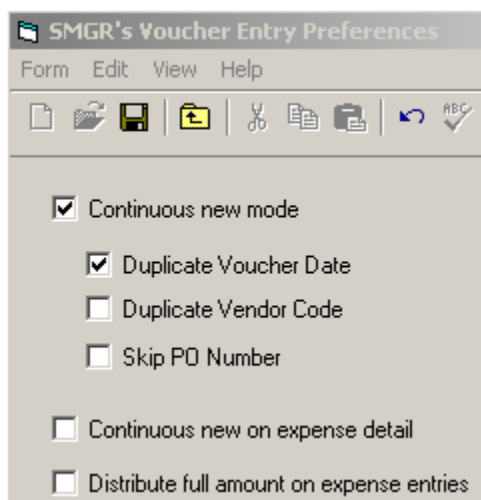
Note: If the import options are not changed importing of batches more than once could occur



Payment Vouchers:

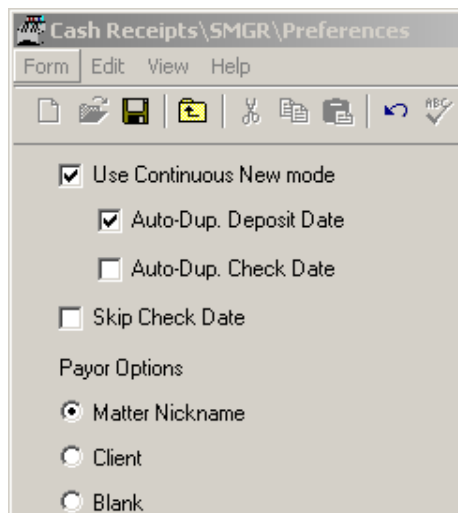
- (Accessed by opening a new payment voucher and going to Tools > Preferences)
- All previously selected preferences will remain.

Note: The specific data that was keyed in the fields for auto-duplication will need to be re-entered.

**Cash Receipts:**

- (Accessed by opening a new cash receipt and going to Tools > Preferences)
- All previously selected preferences will remain with the exception of the Payor Option, it is reset to default of Matter Nickname

Note: The specific data that was keyed in the fields for auto-duplication will need to be re-entered.



Checks:

- Payment Date reset to today's date
- Next Payment Date reset to 7 days out of Payment Date

Select Vouchers for Payment

Bank Account: OPER Operating Account

A/P Account: << ALL >>

Vendor Group: << ALL >>

Payment Date: 05/26/2010

Next Payment Date: 06/02/2010

☐ Select PAST DUE Vouchers with a Due Date before Payment Date.

☐ Select CURRENT Vouchers with a Due Date before Next Payment Date.

☐ Select Vouchers that would lose discount if paid on or after Next Payment Date.

Select Manual Select Cancel

Billing:

- Select Prebill, Reprint Prebills, Print Bills, Post Bills, Export & Email Bills are all reset to default selections
- Print Statements is reset to default selections
- Edit Prebill view reset to default of My Unedited Prebills

Billing\Edit Prebills

Form Edit View Sort Tools Help

✓ Toolbar

✓ Status Bar

✓ My Unedited Prebills

All Unedited Prebills

All My Prebills

All Prebills

Filter...

Prebill

Billing Timekeeper

Client Code / Matter Code

Client / Consolida

For help, press F1

CAPS NUM

Edit Prebill:

- Prebill Edit preferences are reset to default for both time and expenses
- (Accessed by editing a time or expense entry>tools>preferences)

Prebill Fee Item

	As Worked	As Billed
Date	05/26/2010	05/26/2010
Timekeeper		
Client	0001	
Matter	0000	
Budget Phase		0
Task Code		
Activity Code		
Billable Time	<input checked="" type="checkbox"/> Yes	
Hours Worked		0.00
Hours To Bill		0.00
Rate		0.00
Amount		0.00
Code 1		
Code 2		
Code 3		

Prebill Edit Preferences

As Worked

- ☐ Update As Billed Date when As Worked changes
- ☐ Update As Billed Timekeeper when As Worked changes
- ☐ Update As Billed Hours, Rate, and Amount when As Worked changes

As Billed

- ☒ Prompt to use new rate when Timekeeper changes
- ☐ Recalculate hours to bill when amount changes
- ☐ Recalculate rate when amount changes

OK Apply Cancel

Prebill Expense Item

	As Entered	As Billed
Date	05/26/2010	
Client	0001	
Matter		0
Expense Code	E101	
Units	60.00	60.00
Multiplier	1.0000	
Amount	60.00	60.00
Summarize	<input type="checkbox"/> No	
Incurred By		
Budget Phase		0
Task Code		
Code 1		
Code 2		
Code 3		

Prebill Edit Preferences

As Entered

- ☐ Update As Billed Units and Amount when As Entered changes
- ☐ Reserved
- ☐ Reserved

As Billed

- ☐ Reserved
- ☐ Reserved
- ☐ Reserved

OK Apply Cancel

Setup and Manage:

- If you clear employee preferences for SMGR this will clear **ALL** Client Templates regardless of who created them

Setup and Manage Client Template

Form View Tools Help

Contact E-mail Address:

	Client	Client Nickname
1	0001	Firm Client
2		