Juris® and Juris Suite 2.6

Release Notes

Before you install

Be sure to do the following before installing Juris® and Juris Suite 2.6:

- Perform a **complete backup** of your Juris data files and documents.
- Close Juris and all open applications on your computer.

What's new in this release

The following features and enhancements are new in Juris and Juris Suite 2.6:

**Windows® 8, Windows Server® 2012, and SQL Server® 2012**

Windows 8, Windows Server 2012, and SQL Server 2012 are now supported operating systems for Juris and Juris Suite.

**New Juris Suite reports**

Over 100 new reports have been added to Juris Suite reporting with 2.6. These reports were formerly packaged as "Juris West Coast," "Gold," or "Supplemental" reports. The reports are as follows:

**Accounts Payable specific reports:**

- All AP Batch GL & Expense Distributions By Month & Year
- All AP Batch GL & Expense Distributions Subreport
- Alpha Vendor List
- AP 1099 JWC - AP - AP Batch GL & Expense Distributions
- AP Batch GL & Expense Distributions Subreport
- AP Open Invoices As Of
- AP Open Invoices with Matter Exp Dists - Current
- AP Unpaid Voucher Distribution by GL Account
- AP Unpaid Voucher Distribution by Vendor
- AP Vendor Check History
AP Vendor Invoice History
AP Vendor Voucher History
Total GL Subreport
Total GL Subreport by Invoice Date
Total GL Subreport by Voucher Date
Voucher GL Subreport
Voucher GL Subreport by Invoice Date
Voucher Vendor GL Subreport
Voucher Vendor GL Subreport by Invoice Date
Voucher Vendor GL Subreport by Voucher Date

**Billing specific reports:**
Accounts Receivable Writeoffs - Accounts Receivable Writeoffs
Accounts Receivable Writeoffs - Accounts Receivable Writeoffs by Billing Timekeeper
Aged Accounts Receivable - Aged Detail by Client
Aged Accounts Receivable - Aged Detail by Originating Timekeeper
Aged Accounts Receivable - Aged Summary by Billing Timekeeper
Aged Accounts Receivable - Aged Summary by Billing Timekeeper for Clients > X Amt
Aged Accounts Receivable - Aged Summary by Billing Timekeeper with Matter Balances >
Aged Accounts Receivable - Aged Summary by Client
Aged Accounts Receivable - Aged Summary by Client Consolidation
Aged Accounts Receivable - Aged Summary by Originating Timekeeper
Aged Work in Process - Aged Expenses by Billing Timekeeper
Aged Work in Process - Aged Expenses by Client
Aged Work in Process - Aged Expenses by Expense Code
Aged Work in Process - Aged Fees by Billing Timekeeper
Aged Work in Process - Aged Fees by Client
Aged Work in Process - Aged Fees by Working Timekeeper
Analysis of WIP and AR - Firm Accrual Analysis
Analysis of WIP and AR - Firm Accrual Analysis with Tax Surcharge and Interest
Billed Fees and Hours - Billed Fees and Hours by Working Timekeeper
Billing and Receipts - Billings and Receipts by Billing Attorney
Billing and Receipts - Billings and Receipts by Personnel Type, Working, Billing, O
Billing and Receipts - Billings and Receipts by Working, Billing, Originating
Billing and Receipts- Billings and Receipts by Client Matter
Billing and Receipts- Billings and Receipts by Originating Attorney
Billing Worksheet - Billing Worksheet by Billing Timekeeper
Billing Worksheet - Billing Worksheet by Client Matter
Cash/Trust - Prepaid Balance Report with As Of Date
Cash/Trust - Trust Prepaid Balance Report with As Of Date
Cash/Trust - Daily Cash Deposit Summary
Cash/Trust - Daily Cash Deposit Summary by Bank Account
Cash/Trust - Prepaid Applied
Collection History - Collection Detail by Client Matter
Collection History - Collection Summary by Billing Agreement
Collection History - Collection Summary by Billing Attorney
Collection History - Collection Summary by Client
Collection History - Collection Summary by Originating Attorney
Collection History - Collection Summary by Practice Class
Employee Time Report - Time Entry by Personnel Type, Timekeeper
Expense Analysis - Summary by Expense Type, Code
Expense Analysis - Summary by Expense Type, Matter
Expense Analysis - Summary by Matter, Expense Code & Type
Fee Adjustments and Writeoffs - MTD YTD by Billing Timekeeper
Fee Adjustments and Writeoffs - MTD YTD by Client with Working Timekeeper
Fee Adjustments and Writeoffs - MTD YTD by Working Timekeeper
Fee Analysis - Fee Analysis Summary by Billing Timekeeper
Fee Analysis - Fee Analysis Summary by Billing Timekeeper and Working Timekeeper
Fee Analysis - Fee Analysis Summary by Client
Fee Analysis - Fee Analysis Summary by Client and Working Timekeeper
Fee Analysis - Fee Analysis Summary by Origination Timekeeper
Fee Analysis - Fee Analysis Summary by Origination Timekeeper and Working Timekeeper
Fee Analysis - Fee Analysis Summary by Practice Class
Fee Analysis - Fee Analysis Summary by Practice Class and Working Timekeeper
Fee Analysis - Fee Analysis Summary by Working Timekeeper
Fee Analysis - Fee Analysis Summary by Working Timekeeper and Billing Timekeeper
Fee Analysis - Fee Analysis Summary by Working Timekeeper and Client
Fee Analysis - Fee Analysis Summary by Working Timekeeper and Origination Timekeeper
Fee Analysis - Fee Analysis Summary by Working Timekeeper and Practice Class
Markup/Markdowns - Expenses by Client, Exp Code
Markup/Markdowns - Expenses by Billing Timekeeper, Client
Markup/Markdowns - Expenses by Billing Timekeeper, Client, Exp Code
Markup/Markdowns - Expenses by Expense Code, Client
Markup/Markdowns - Fees by Billing Timekeeper, Client
Markup/Markdowns - Fees by Billing Timekeeper, Working Timekeeper
Markup/Markdowns - Fees by Client Matter
Markup/Markdowns - Fees by Working Attorney, Client
Matter Expense Analysis
Productivity Analysis - Productivity Analysis by Timekeeper
Productivity Analysis - Productivity Analysis Firm Totals
Time and Fee Analysis - Time and Fee Analysis by Billing and Working Timekeeper
Time and Fee Analysis - Time and Fee Analysis by Billing Timekeeper
Time and Fee Analysis - Time and Fee Analysis by Personnel Type and Timekeeper
Time and Fee Analysis - Time and Fee Analysis by Working Timekeeper
WIP Time and Expense Details - WIP Time and Expense Details
WIP Time Expense Detail - Sub Report Client Matter WIP Expense
WIP Time Expense Detail - Sub Report Client Matter WIP Time
Work Values - Billing Attorney Matter Detail
Work Values - Billing Attorney Summary
Work Values - Client, Matter, Working Timekeeper
Working Attorney Monthly Report
Ledger History - Ledger History Billings
Ledger History - Ledger History Billings by Billing Timekeeper
Ledger History - Ledger History Details
Ledger History - Ledger History Details by Billing Timekeeper
Ledger History - Ledger History Receipts
Ledger History - Ledger History Receipts by Billing Timekeeper
**Special reports:**
Billed Rate Statistics  
Client and Matter Summary - BAC Clt Nbr  
Client and Matter Summary - Billing Atty  
Client and Matter Summary - Client Name  
Client and Matter Summary - Clt Nbr  
Client and Matter Summary - Clt NickName  
Client Matter List - Originating Attorney  
Client Note - Conflicts

**Other reports:**
Alphabetic Matter List  
Alphabetic Matter List by Billing Tkpr  
Alphabetic Matter List by Billing Tkpr and Cycle  
Alphabetic Matter List by Office  
Alphabetic Matter List by Originating Tkpr  
Alphabetic Client List  
Alphabetic Client Matter List  
Alphabetic Client Matter List with Billing Timekeeper  
Alphabetic Client Matter List with Codes  
Alphabetic Client Matter List with Open Status  
AR Adjustments  
Billable Time Utilization by Working Timekeeper  
Billed Expenses By Matter Descending Amount  
Billed Fees By Matter Descending Amount

**Reports Guide**
A new Reports Guide for Juris has been created. This guide is a "living" document, meaning that it will be continually updated to cover all the most commonly used reports. Currently, only a few reports have been added to the guide. However, most all of the common reports should be available in the guide by the end of 2013. The Reports Guide can be accessed from the new link found under the Juris Help menu. Because the guide is being continually updated, you may want to check it periodically for new information.
Mobile Web Access

There have been several Mobile Web Access security features added to Juris for setup and administration of the new Juris® Mobility Service, when it becomes available. The features are:

- An addition to the Firm Options window that lets you turn on Mobile Web Access for the firm
- An addition to the User ID window that lets the administrator or a user turn on Mobile Web Access for themselves (only if it has been turned on for the firm)
- An addition to the Change Password window that lets you set up/change your password for Mobile Web Access

Help menu enhancements

- The Help menu In Juris and Juris Suite have been restructured to make it easier to find help, assistance and product documentation.
- Links to the Administration, Installation, and Reports Guides have been added to the Help menu in Juris and Juris Suite.
- A link to a Beta version of a new online Help has been added to the Help menu.
# Issues addressed

The following issues have been addressed in Juris® and Juris Suite 2.6:

## Juris Suite

### Reports

<table>
<thead>
<tr>
<th>Issue</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>4870036</td>
<td>Editing parameters for a report in a distribution, resets the parameters for other reports in the distribution to the defaults.</td>
</tr>
<tr>
<td>3834879</td>
<td>The * option for matters does not work if matters are set to numeric. When set to numeric and the * option is used, if you select all matters for a particular client, the Active information report shows all matters in the database.</td>
</tr>
<tr>
<td>2901164</td>
<td>The Billing Projection Report is not displaying Unbilled Expenses.</td>
</tr>
<tr>
<td>2794528</td>
<td>The Billing Projection Report only shows data if Use Billing Month is set to 1.</td>
</tr>
<tr>
<td>3308707</td>
<td>The Aged Open Items Report includes checks that were paid on the same date as the cutoff date.</td>
</tr>
<tr>
<td>2728436</td>
<td>The Voucher Audit Report Subreport results in an error and does not run, when the firm is set to cash basis for A/P.</td>
</tr>
<tr>
<td>4012614</td>
<td>When you set the date offset last day of the month to -1 on any report, the system only subtracts the number of days in the current month. For example, if you set the -1 on the 30th of June (the last day of June) the resulting report only shows through May 30th, even though there are 31 days in May.</td>
</tr>
</tbody>
</table>

### My Transactions

<table>
<thead>
<tr>
<th>Issue</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>4233383</td>
<td>Client/matter code populates very slowly when the client/matter is entered in the Time Entry grid.</td>
</tr>
<tr>
<td>3095202</td>
<td>Need to remove the application issue in Field level access permissions for the group &quot;Firm.&quot;</td>
</tr>
</tbody>
</table>
Plans for the future
The following issue will be considered for inclusion in a future release.

Juris

Installation

API files do not register during installation.

3209 Currently, JurisEE.dll, JurisTE.dll, and JurisTableInterface.dll need to be manually registered.