

## Practice Management

MyJuris/Juris Suite  
Quick Reference Guide

TOTAL PRACTICE SOLUTIONS  
Client Development   Research Solutions   Practice Management   Litigation Services



# CONTENTS

Introduction.....	3
Note to Users of prior Versions of MyJuris.....	3
Note to Timesheet users .....	3
Logging In.....	3
First Steps .....	4
Default Location .....	4
Changing the Default Location .....	4
Entering Time.....	6
Entering Expenses.....	7
Find your recent Time.....	8
My Views Screen Settings.....	9
Adding/Removing an item from My Views.....	9
Resizing/moving Items in My Views .....	9
Altering the display of an item .....	10
My Time Screen Settings .....	11
The Grid view.....	11
Add/remove fields from the Grid .....	11
Include Sums in the Grid.....	12
View Entire narrative in the Grid .....	13
The Calendar View.....	14
Viewing time in the Calendar .....	14
Modifying the Entries within the Calendar.....	14
Modifying the Calendar View .....	15
The Tasks View .....	15
The Editor Panel.....	16

To View/Hide the Editor Panel .....	17
To Resize the Editor Panel .....	17
the Summary Panel.....	18
Time Entry Filters.....	19
Filtering Time entries.....	19
Creating a new Filter.....	20
Defining Favorite filters .....	21
Hiding a filter .....	22
Client/Matter Lookup .....	22
Using the lookup form .....	22
Quick Lookups without opening the Lookup form .....	24
Spelling/Spell Check.....	25
Client/Matter Inquiry.....	26
Accessing Client/Matter Inquiry .....	26
Viewing a Client/All Matters, or a Partuclar Matter.....	26
Viewing Recent Records/All records.....	27
Conflict Inquiry .....	27
Accessing Confclit Inquiry.....	27
Performing a Conflcit Inquiry.....	28

## INTRODUCTION

This guide is designed to assist users in navigating and functioning using Juris Suite for those who previously used Timesheet or earlier versions of MyJuris.



Juris Suite 2.0 is a single application that combines the features of the previously separate software products, MyJuris and Active Information. After 8/20/2008, all new installations will be of Juris Suite in lieu of MyJuris and Active Information applications.

This document includes detailed instructions that will help you to get around Juris Suite.

## NOTE TO USERS OF PRIOR VERSIONS OF MYJURIS

This guide will help you find all of the functions you were used to using in MyJuris. You will find that although the interface looks quite a bit different, the functional areas will work much as they did before.

To summarize, the major interface changes are as follows:

- The icon to log in is now called **Juris Suite** instead of MyJuris
- The MyJuris tab is now called **My Summary**
- My Time and My Expenses are now called **My Transactions**
- Additional functions of My Reports, Budgeting, and Business Intelligence will be shown. Most former My Juris users will not have access to these areas – they are typically available only to administrators.
- My Inquiry still contains the Client Matter Inquiry and Conflict Inquiry functions

## NOTE TO TIMESHEET USERS

Your new time entry software looks quite a bit different than the software you are used to. Getting used to the new look and feel will be challenging in the first few weeks, but as you acclimate to the software, we believe that you will begin to appreciate the new functionality available to you through this system.

## LOGGING IN

1. Click the Juris Suite Icon (shown below)



2. Log in using your same ID and Password

## FIRST STEPS

### DEFAULT LOCATION

When you first log in (depending on your user settings) you will likely see the My Calendar screen within My Summary. This view will show a summary of time and expense entries by day.

The screenshot shows the 'My Calendar: by Timekeeper [by Hours Worked]' interface. A callout box displays the following data for a selected day:

- Hours Worked: 90.00
- Hours to Bill: 90.00
- Billable: 90.00
- Nonbillable: 0.00
- Avg. Billable Rat.: \$225.00
- Effective Rate: \$225.00

Clicking on a day in the calendar will display the Time and Expense Icons. Click these icons to open the detailed line items for Time and or Expenses on that date

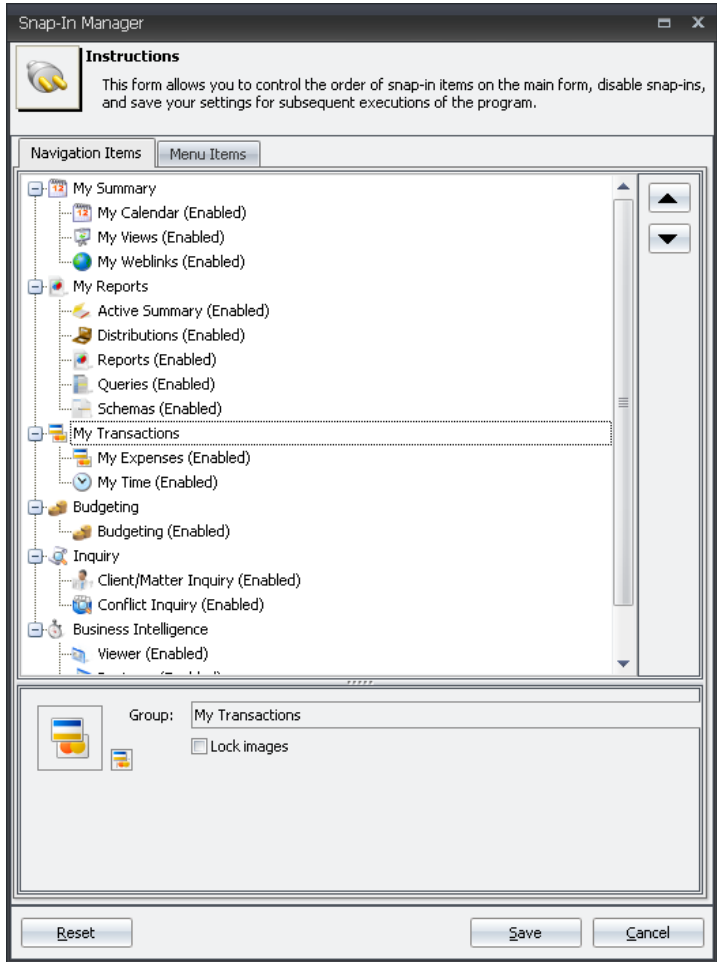
### CHANGING THE DEFAULT LOCATION

If you prefer that the system open to a different screen than the My Calendar screen within My Summary, then you can set another screen to be your default. Each user can have their own default and order of screens. Let's say that you want to go straight into the time entry area when you log in, here is how you make that change:

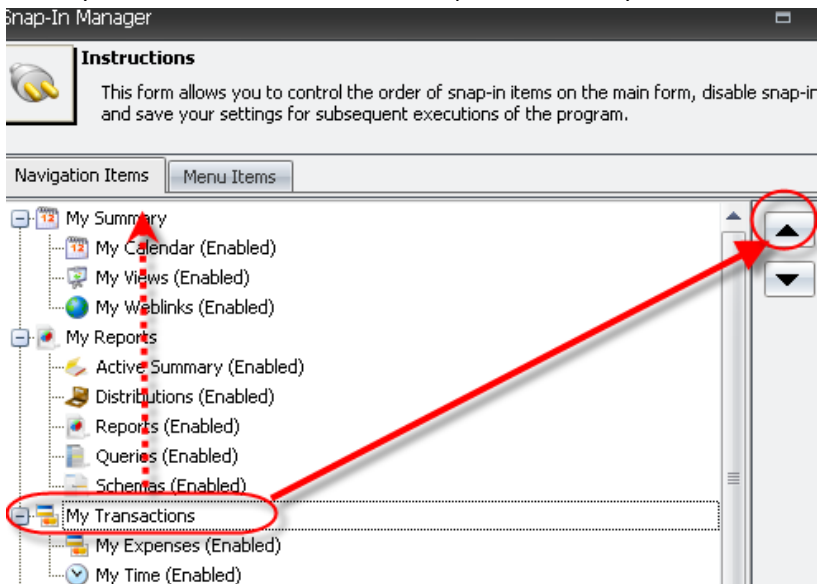
1. Select Juris > Snap Ins > Snap In Manager

The screenshot shows the 'Snap In Manager' interface. The 'Snap-Ins' menu is expanded, and 'Snap In Manager' is highlighted. The interface also shows a 'Views' section with a 'Sunday' view selected.

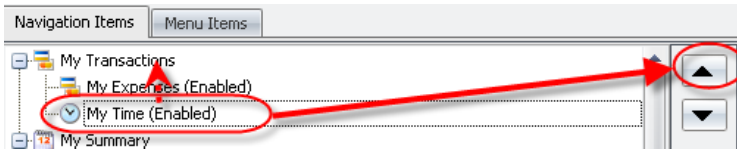
- The order in which items appear in the Snap In Manager determines the order in which they will be displayed in the screen. The first item in the list is the default Snap In and the first function below that Snap In is the default function.



- Click My Transactions and then click the up arrow until My Transactions is at the top:



- Now click My Time and use the up arrow to move it above My Expenses

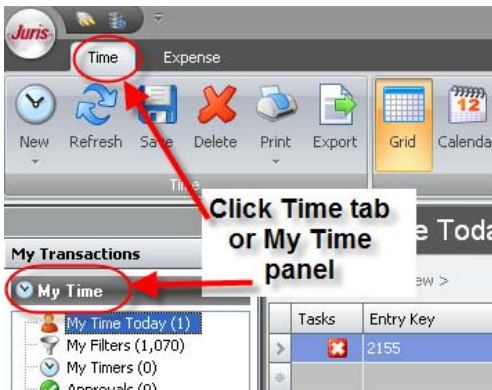


- Save and close. The system will reload and place your default screen at the top.

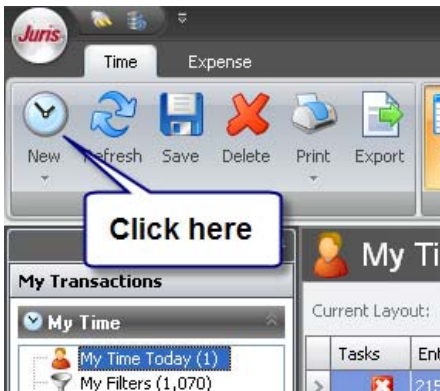
## ENTERING TIME

There are several methods for entering time in Juris Suite. The method shown here is the most direct.

- Go to My transactions
- Click the Time tab OR the My Time Panel



- Click the NEW button

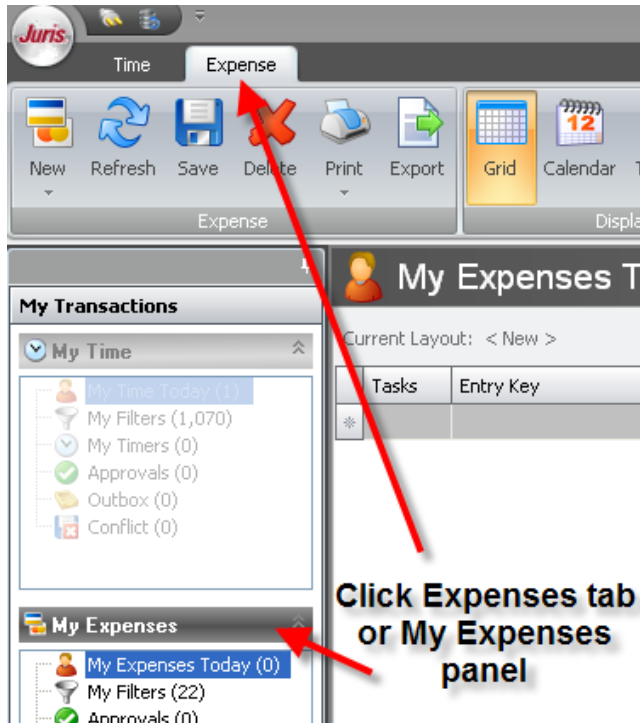


- Notice that the NEW button offers alternate functions. Click the arrow below the NEW button to change the function to Auto New, New w/Timer or Auto New w/Timer. Select your preferred setting. This setting will remain in place on subsequent logins.
  - New: Opens a new entry with the date = today's date and timekeeper = user currently logged in. If user logged in is not a timekeeper then the timekeeper field remains blank.
  - Auto-New: Opens a new entry with some fields duplicated from the prior entry. To see which fields are duplicated, open Juris > My Settings > My Time > Auto New Settings.
  - New W/Timer: Same as New but the entry opens with the timer running.
  - Auto-New w/Timer: Same as Auto-New but the entry opens with the timer running.

## ENTERING EXPENSES

There are several methods for entering expenses in Juris Suite. The method shown here is the most direct.

1. Go to My Transactions
2. Click the Expense tab OR the My Expenses Panel



3. Click the NEW button



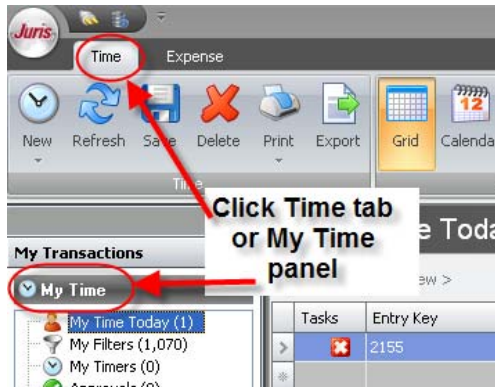
4. Notice that the NEW button offers an alternate function, Auto New. Click the arrow below the NEW button to change the function to Auto New if desired. This setting will remain in place on subsequent logins.
  - a. New: Opens a new entry with the date = today's date
  - b. Auto-New: Opens a new entry with some fields duplicated from the prior entry. To see which fields are duplicated, open Juris > My Settings > My Expense > Auto New Settings.



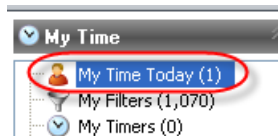
## FIND YOUR RECENT TIME

To enter open recent time:

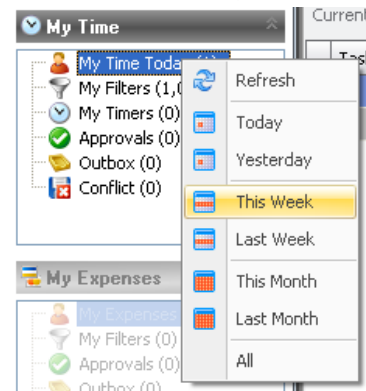
1. Go to My Transactions
2. Click the Time tab OR the My Time panel



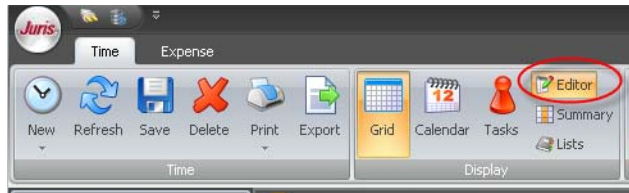
3. Click the My Time Today node (Notice that a number displays in parenthesis to show you how many time records you have today)



4. If you prefer to see time for This Week, Last Week, This Month, etc. Right-click the My Time Today node and select the preferred setting. (Watch the number of records change as you select more history to be selected). This setting will remain in place on subsequent logins.



5. The entries will be displayed in the Grid. Double-click a row to open the entry. Alternatively you may elect to display the Editor below the grid by clicking the Editor icon.

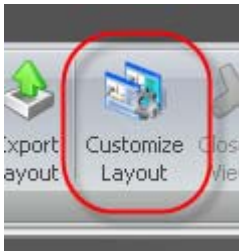


## MY VIEWS SCREEN SETTINGS

The My Views area of My Summary allows the user to select how which views they would like to have displayed.

### ADDING/REMOVING AN ITEM FROM MY VIEWS

1. From My Summary, select the My Views panel.
2. Click the Customize Layout button.



3. To add an item, drag and drop the item from the Customize layouts panel into the Views screen. To remove an item, drag and drop the item from the Views screen into the Customize layouts panel.

The screenshot shows the 'My Views' interface. On the left is a 'Heat Map by Amount (All Entries)' for the period 'From 7/20/2008 to 8/30/2008'. The heatmap has columns for days of the week (Sun-Sat) and rows for dates from July 20 to August 30. A red arrow points from the 'Billed Time-Billed Amount Realization' item in the customization panel to a cell in the heatmap. Another red arrow points from the 'Clients-Top X Clients Count' item in the customization panel to a cell in a table below the heatmap.

Status	Mon	Tue	Wed
Draft	0.00	0.00	0.00
Ready To	0.00	0.00	0.00
Memoran	0.00	0.00	0.00
Recorded	0.00	0.00	0.00
Posted	0.00	0.00	0.00

The 'Customization' panel on the right lists various items with checkboxes. A red circle highlights 'Billed Time-Billed Amount Realization'. A blue callout box with the text 'To add, drag onto the View' points to this item. Another blue callout box with the text 'To remove, drag back to the Customize layout panel.' points to 'Clients-Top X Clients Count'.

### RESIZING/MOVING ITEMS IN MY VIEWS

1. From My Summary, select the My Views panel.
2. Click the Customize Layout button, this will show the gray lines that define the borders of the items in the View.

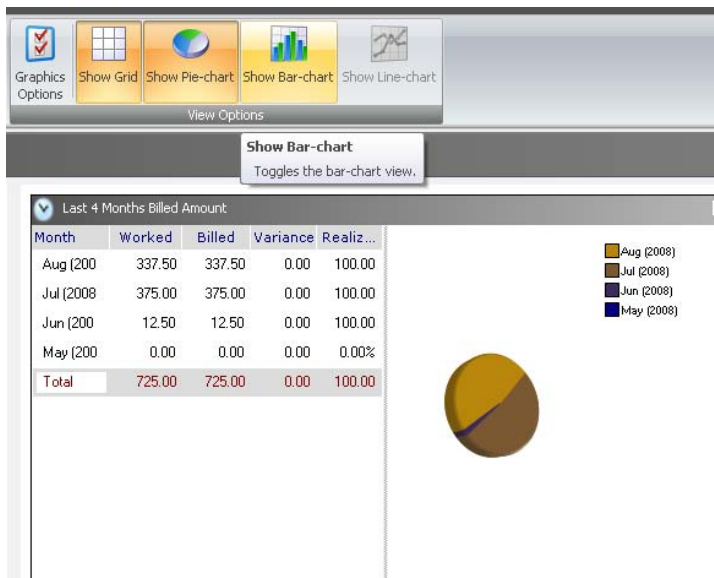
3. Drag the gray line right or left to increase/decrease the width of a view. Drag the gray line up or down to increase/decrease the height of a view.



4. Click in the middle of an item and drag and drop to move that item to another area of the screen.

## ALTERING THE DISPLAY OF AN ITEM

1. From My Summary, select the My Views panel.
2. Click the view that you wish to alter.
3. From the View Options panel, select or de-select Show Grid to show/hide the grid portion of the selected item.
4. From the View Options panel, select or de-select Show Pie Chart/Show Bar Chart/Show Line Chart to show/hide the chart portion of the selected item, or to change the chart shown.
5. From the View Options panel, select the Graphics Options function to change the colors or orientation of the graphics shown in the selected item,
6. If any one of the above functions is disabled, that indicates that the function is not available on the selected item (or that possibly an item within the view has not been selected for alteration).



## MY TIME SCREEN SETTINGS

The My Time area of My Transactions (as well as My Expenses) allows the user to select how they would like their transactional information to be displayed. Options are:

- Grid view: Shows each entry as a line item in a grid that functions much like a spreadsheet.
- Calendar View: Shows each entry within a calendar view, using entry date and start time of entry to place the items in the correct location within the calendar. Moving an entry within the calendar changes the start time of the entry. Increasing or decreasing the size of the entry will increase/decrease the hours worked for that entry.
- Tasks View: Shows all compliance violations for entries so the user can correct all violations and submit time.
- Editor Panel: Shows a single entry in a large editor window.
- Summary Panel: Shows summary values for the current user or selected team.
- Lists Panels: Shows lists of Clients, Timekeepers, Task Codes or Activity Codes that may be dragged into an entry with the mouse.

## THE GRID VIEW

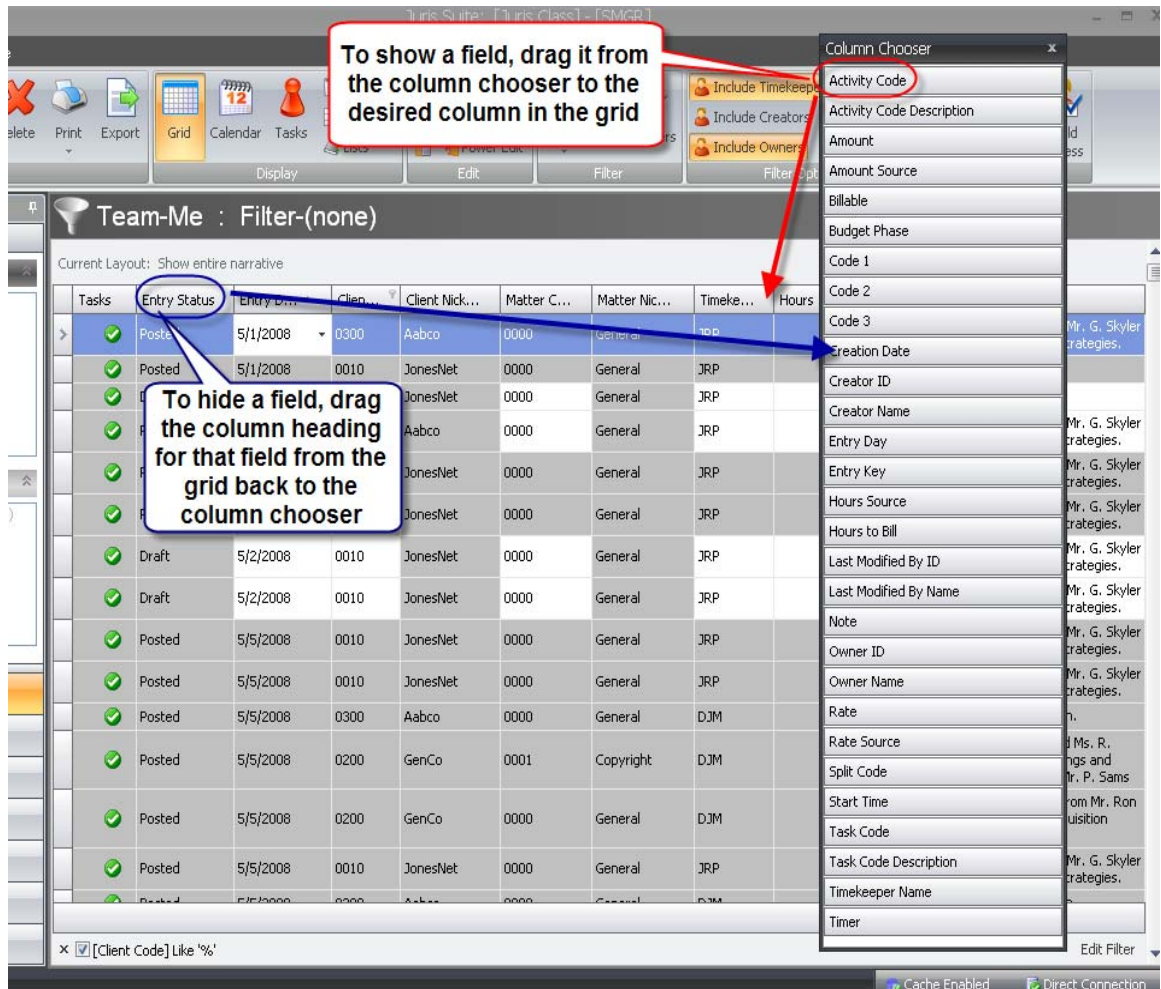
### Add/remove fields from the Grid

You may elect to add or remove fields from the time entry grid. Here's how:

1. First open the Column Chooser

The screenshot shows a grid of time entries. The grid has columns for 'T...', 'Entry Sta...', 'Entry ...', 'Client ...', 'Client Nick...', 'Matter ...', and 'Matter Ni...'. The 'Entry ...' column contains dates like '5/1/2008' and '5/2/2008'. The 'Client ...' column contains codes like '0300' and '0010'. The 'Client Nick...' column contains names like 'JonesNet' and 'Aabco'. The 'Matter ...' column contains codes like '0000'. The 'Matter Ni...' column contains the word 'General'. The grid also has a 'Narrative' column with text like 'Review documents; confer...' and 'Skyler to review potential leg... strategies.'. A 'Layout Chooser' menu is open over the grid, with 'Column Chooser' selected. The menu also includes options like 'Clear Sorting', 'Clear Filters', 'Clear Group By', 'Clear Summaries', 'Clear Pinned Columns', 'Best Fit Columns', 'Auto Fit Columns', 'Auto Size Rows', and 'New Row Position'. Two callouts are present: one pointing to the gray bar above the grid with the text 'Right-click in the gray bar to access the layout menu', and another pointing to the 'Column Chooser' option in the menu with the text 'Select Column Chooser'.

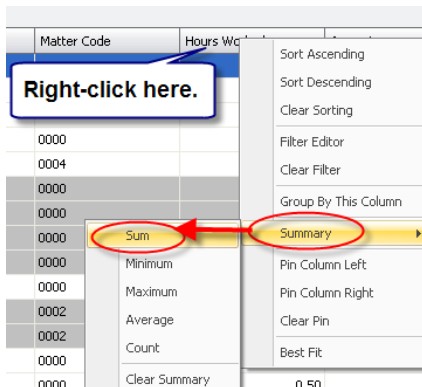
2. Now add or remove fields



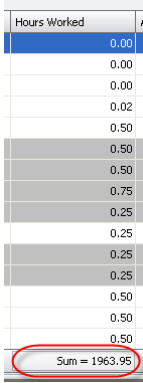
Include Sums in the Grid

Each column may be summarized. Options vary based on column – but you may elect to sum, average, show minimum value, show maximum value or count the rows. Here’s how:

1. Right-click the name of the column you wish to summarize.
2. Select Summary, then select the desired summary function from the Summary menu as shown:



3. The system will show the total in the gray bar at the bottom of the grid.

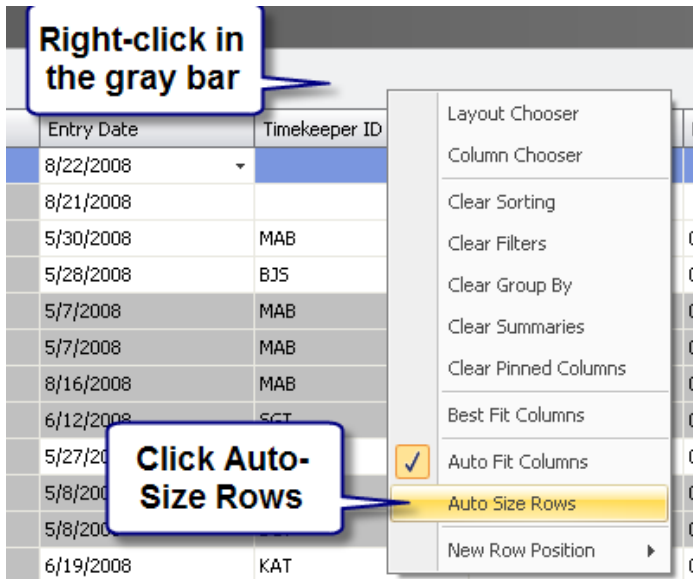


A screenshot of a grid with a 'Hours Worked' column. The grid contains several rows with values ranging from 0.00 to 0.50. The bottom row is a gray bar containing the text 'Sum = 1963,95', which is circled in red.

Hours Worked
0.00
0.00
0.00
0.02
0.50
0.50
0.75
0.25
0.25
0.25
0.50
0.50
0.50
Sum = 1963,95

### View Entire narrative in the Grid

You may elect to increase the row size to accommodate the entire narrative in the time entry grid. Here's how:

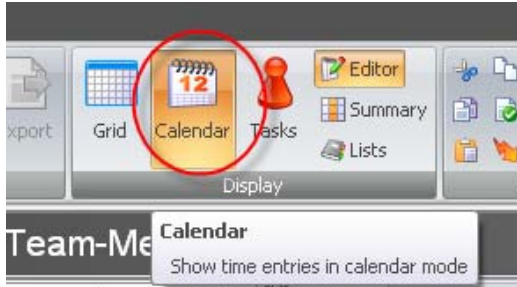


## THE CALENDAR VIEW

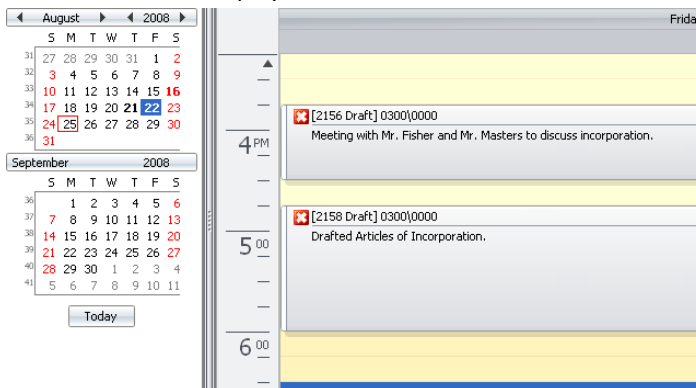
### Viewing time in the Calendar

Entries may be shown in a calendar mode. Here's how:

1. Click the Calendar icon



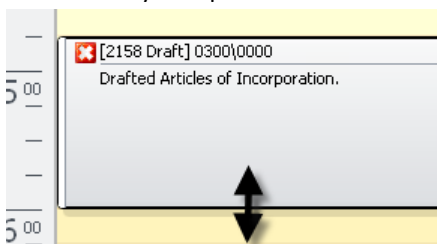
2. The entries will be displayed in the Calendar mode.



### Modifying the Entries within the Calendar

When an item is resized or moved within the calendar, the entry itself is modified by that change.

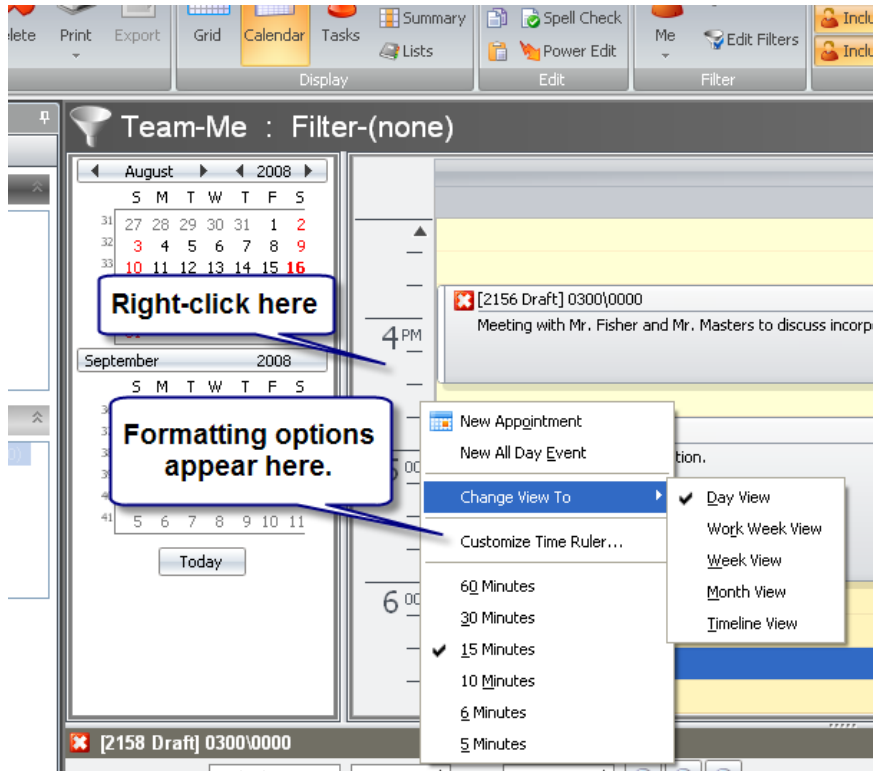
1. Making a field taller or shorter will increase or decrease the hours on the entry. This is because the area that the entry occupies in the calendar represents the time spent on that entry.



2. Dragging an entry from one area of the Calendar to the other alters the 'start time' of that entry. If you drag an entry from 5pm to 9am, then the start time of that entry will change to 9am.

## Modifying the Calendar View

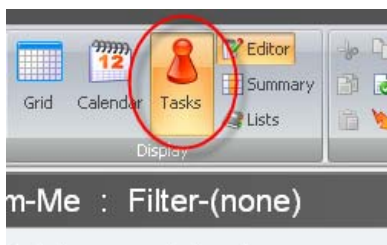
The Calendar can be viewed with different time increments or viewing multiple days at a time. It is easy to change the Calendar view to show these options. Here's how:



## THE TASKS VIEW

Entries may be shown in a tasks mode. This view shows one line item for each task (or violation of a compliance rule.)

1. Click the Tasks icon.





- The entries will be displayed in the Tasks mode.

**Team-Me : Filter-(none)**

Drag a column header here to group by that column

Entry Key	Severity	Field Name	Rule Type	Instructions
2158	Error	Timekeeper	Juris	A valid Timekeeper is required.This erro
2157	Error	Timekeeper	Juris	A valid Timekeeper is required.This erro
2157	Error	Matter	Juris	A valid Matter is required.This error mu:
2156	Error	Timekeeper	Juris	A valid Timekeeper is required.This erro
2155	Error	Timekeeper	Juris	A valid Timekeeper is required.This erro
2155	Error	Matter	Juris	A valid Matter is required.This error mu:
2153	Error	Timekeeper	Juris	A valid Timekeeper is required.This erro
2153	Error	Client	Juris	A valid Client is required.This error must
2153	Error	Matter	Juris	A valid Matter is required.This error mu:
1388	Error	Matter	Juris	A valid Matter is required.This error mu:
1567	Error	Matter	Juris	A valid Matter is required.This error mu:
1566	Error	Matter	Juris	A valid Matter is required.This error mu:
1565	Error	Matter	Juris	A valid Matter is required.This error mu:

---

**[2158 Draft] 0300\0000**

Date/Time: 8/22/2008 1:00 PM 00:00:00

Timekeeper:  A(10)

Client: 0300 A(1) Aabco

Matter: 0000 N(1) General

Task Code:  A(79)

Activity Code:  A(10)

Budget Phase:  0

**Notes**

Code 1:  Narrative: Drafted Articles of Incorporation.

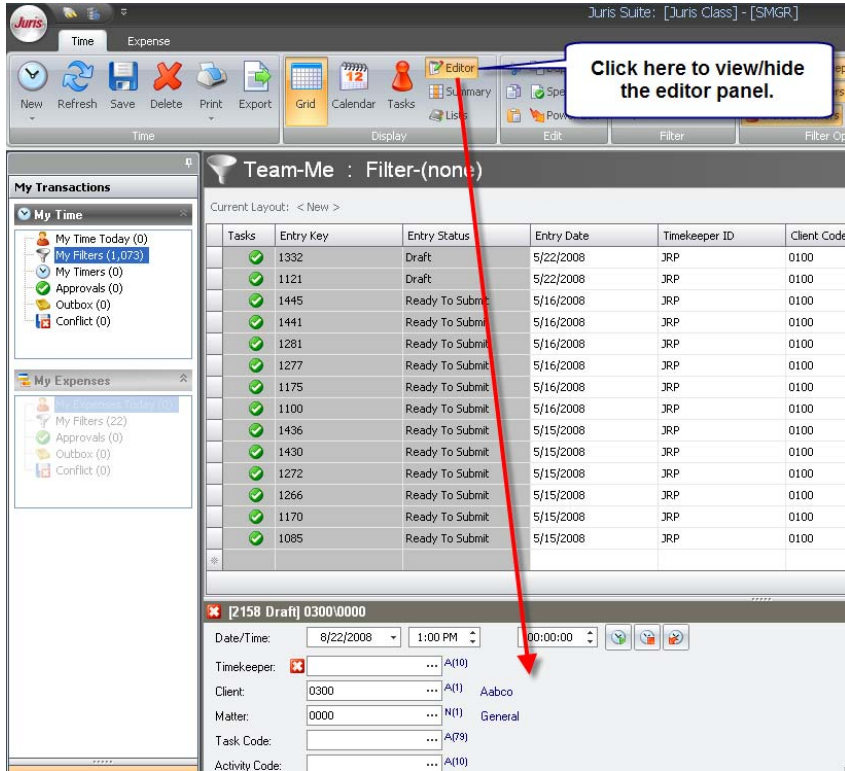
Code 2:

## THE EDITOR PANEL

The Editor panel may be viewed in conjunction with the Grid, Calendar or Tasks view. It may also be hidden altogether. The Editor panel displays a single time entry in full detail based on the fields that the user currently logged in has rights to view.

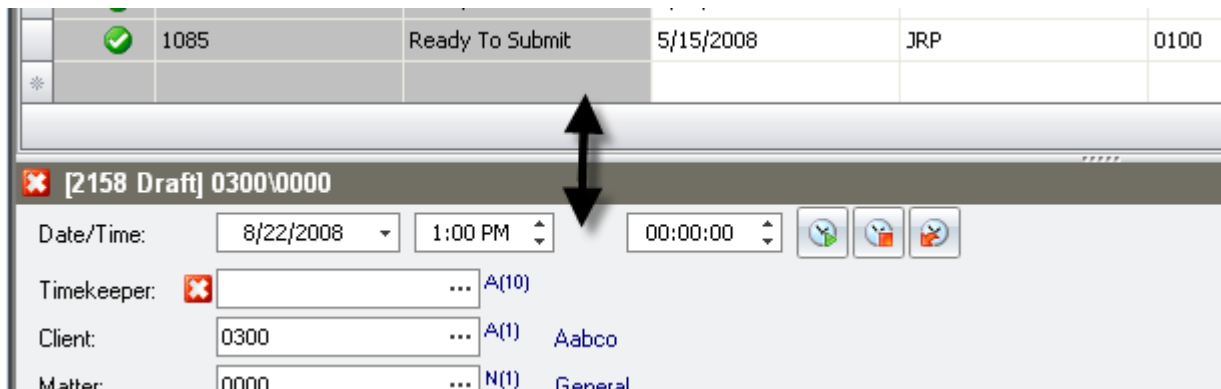
## To View/Hide the Editor Panel

1. Click the Editor button in the Ribbon to hide the Editor panel.
2. Click the Editor button a second time to view the Editor panel.



## To Resize the Editor Panel

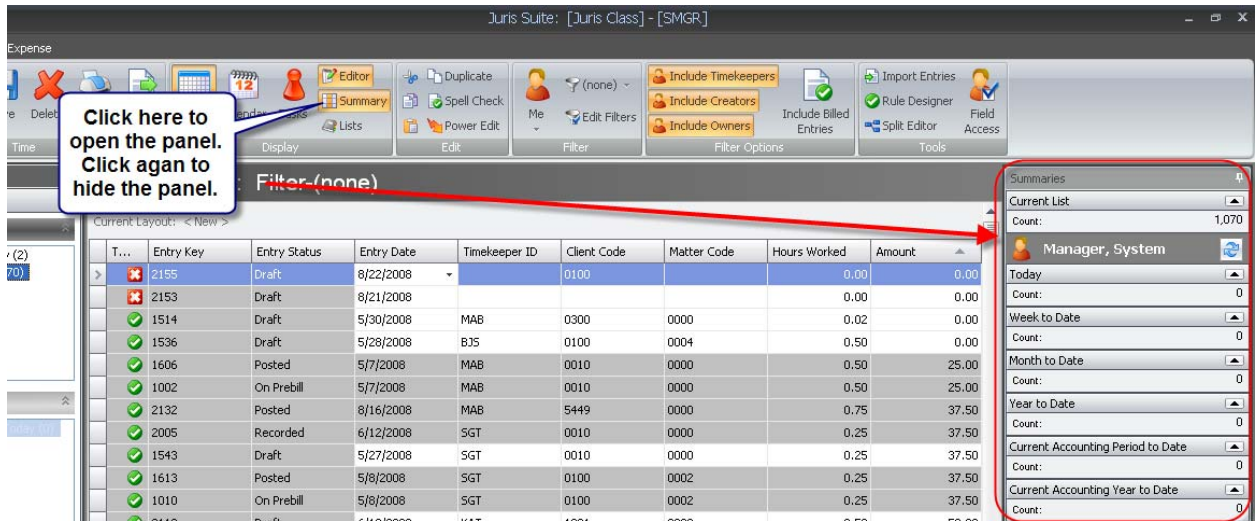
The mouse can be used to increase or decrease the size of the Editor panel. Please note that the system will prevent the user from decreasing the size of the panel to any size smaller than the system can display all functions of that panel. See View/Hide editor for instructions on eliminating the Editor panel altogether, if more space is needed for the Grid, Calendar, or Tasks views.



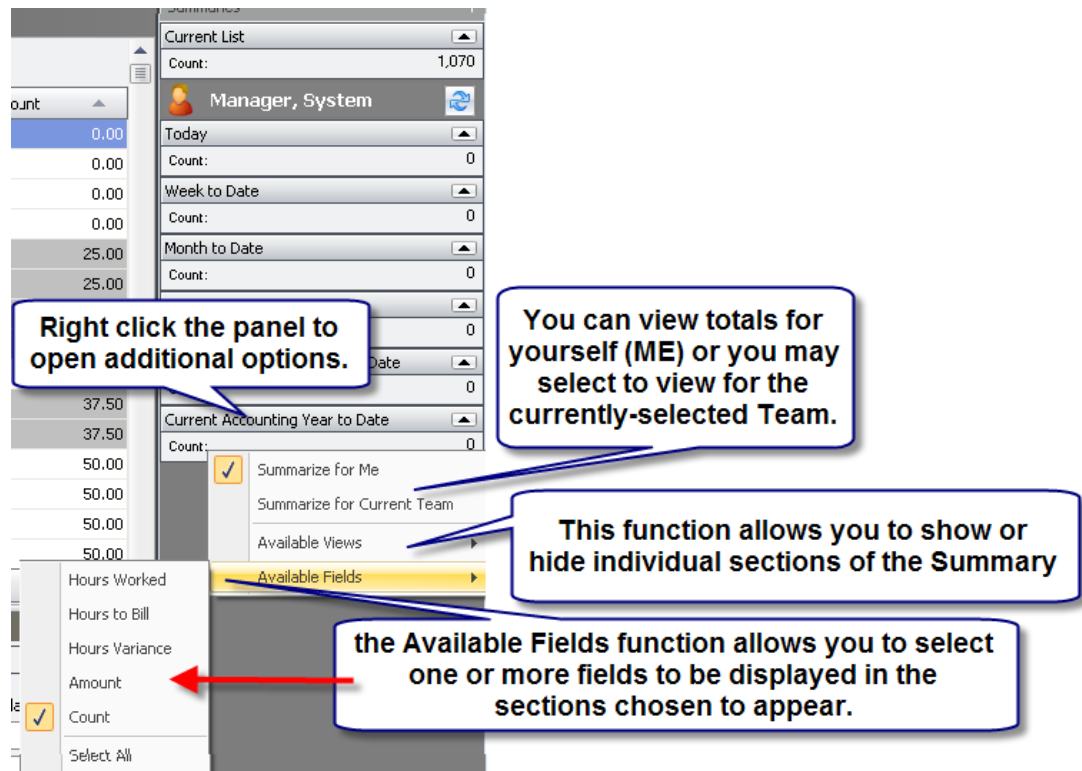
## THE SUMMARY PANEL

Summary information is available to show Today, Week to Date, Month To Date and more in a brief summary panel.

1. To Display the Panel, click the Summary button from the ribbon. A second click will hide the panel.



2. To add/remove information from the panel:
  - a. First open the Panel
  - b. Then select the appropriate settings according to your needs as shown:



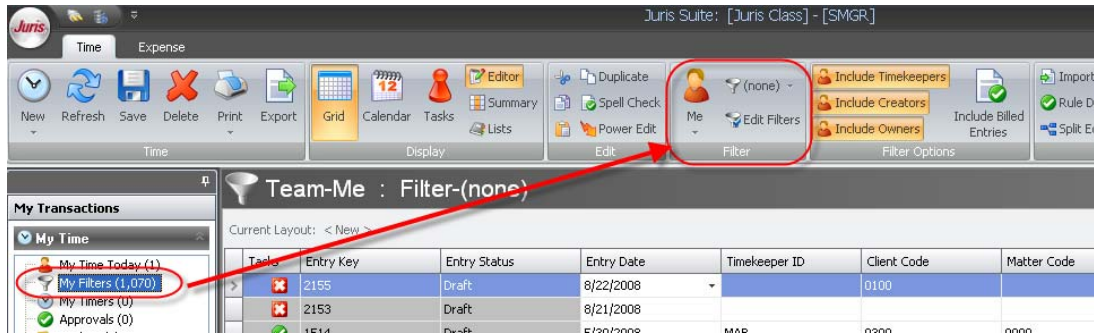
# TIME ENTRY FILTERS

## FILTERING TIME ENTRIES

Sometimes you may want to see other entries besides recently keyed entries (Today, This Week, etc.). In those cases, a Filter can be selected to return entries that match other criteria for yourself or for other timekeepers you may have rights to view via Teams.

NOTE: For firms on earlier versions – the user had to select a filter from below the team node. In Juris Suite, both the Team and the Filter are selected on the Ribbon

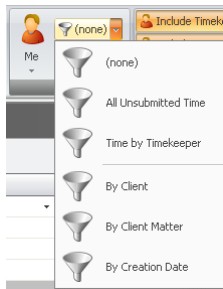
1. Click the My Filters node (notice that a number displays in parenthesis to show you how many records have been returned by your selected filter.)
2. The Filter options on the Ribbon are used to select the Team and the Filter



3. Click the Drop-down on the ME item if you wish to run the Filter for a specific Team (a group of people whose time entries you have permission to view and/or edit)

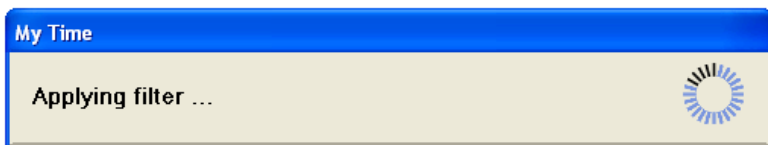


4. Click the Drop-down on the Filter item to select a filter from your menu (if you have no filters on your menu, see the topic **Creating a Filter**). Select the filter you wish to apply to ME or the selected Team.

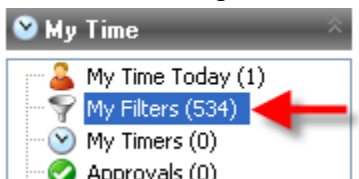


NOTE: Some filters will force a prompt, asking you to supply information to complete the filter. If you see a prompt, supply the requested information.

- The Applying Filter status will appear



- The system will return the results of the selected filter. Notice that the count shown on the My Filters node will have changed to reflect the number of items selected by the filter.

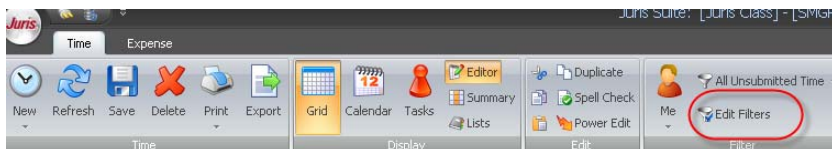


NOTE: You must be on the My Filters node to see the results of your filter. If you are on My Time Today, My Timers, Approvals, Outbox of Conflict, the system is returning your filter results as you run a filter, but those results are not displayed until the **My Filters** node is selected.

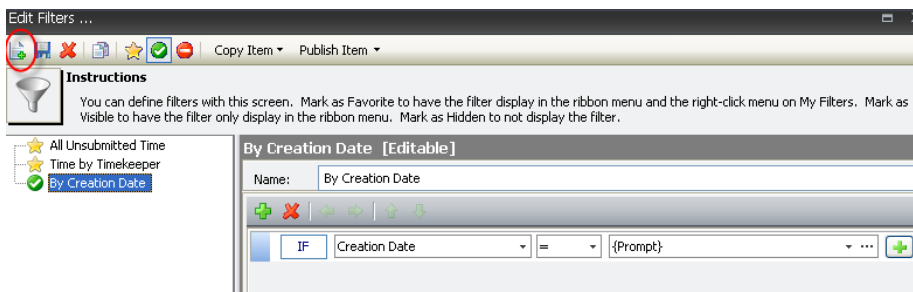
## CREATING A NEW FILTER

Sometimes the filter you need does not exist. Filters are easy to create. Here's how:

- Select the Edit Filters function from the Ribbon



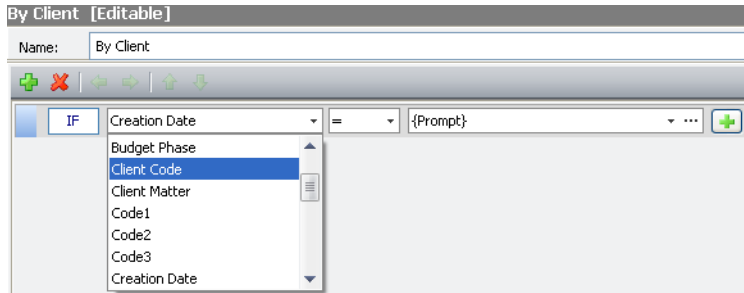
- A panel will open showing all of the current filters.
- Select the NEW icon to create a new filter.



- Give the filter a descriptive name



- Define the criteria for the filter. For example, perhaps you need to pull all time entries for a particular Client – but you wish for the system to allow you to enter a client code at runtime. Define as “IF Client = {Prompt}”

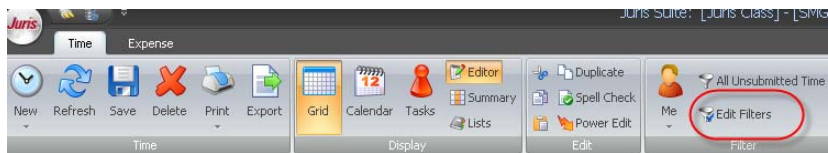


- Click the save icon. Now you will have this filter available in your Filters drop-down list.

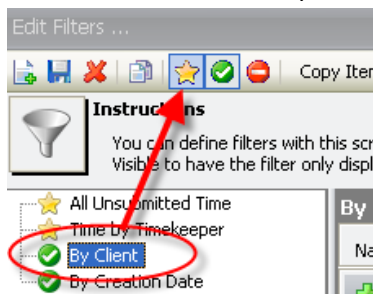
## DEFINING FAVORITE FILTERS

If you use a filter often – define it as a Favorite. This places the filter in the top section of your Filter drop-down list and it makes the filter available as a right-click from the My Filters node. Here’s how:

- Select the Edit Filters function from the Ribbon



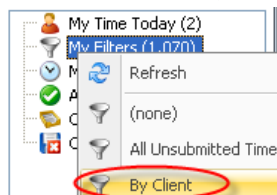
- A panel will open showing all of the current filters.
- Click the name of the filter you wish to have as a favorite and select the star icon as shown.



- Now the filter is defined as a favorite. To check that it appears correctly:
  - Is it shown in the top section of the Filters drop-down?



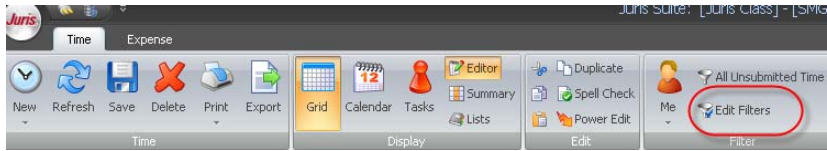
- Is it available as a right-click from the My Filters node?



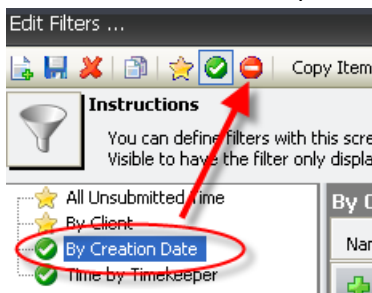
## HIDING A FILTER

If someone publishes a filter - the recipients of that filter will not have rights to alter or delete it. If they choose not to utilize the filter published to them, they may hide that filter. Here's how:

1. Select the Edit Filters function from the Ribbon



2. A panel will open showing all of the current filters.
3. Click the name of the filter you wish to have as a favorite and select the "Set as Hidden" icon as shown.

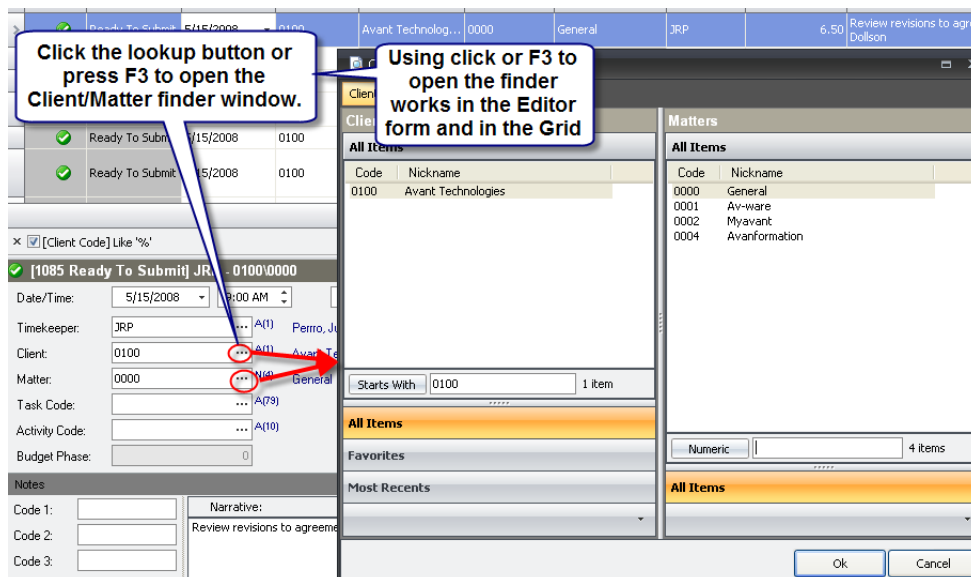


4. Now the filter is defined as hidden. It will no longer appear in the filter's drop-down, but it will be available from the Edit Filters menu in case you elect to set the filter as visible at some point in the future.

## CLIENT/MATTER LOOKUP

### Using the lookup form

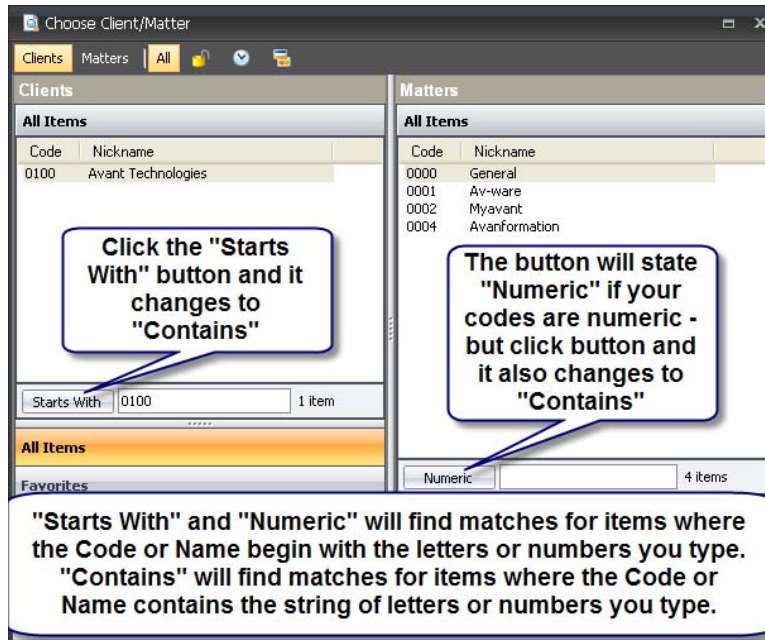
The Client/Matter Lookup is available from the Client field in the Grid or the Editor form. Click the lookup icon (the ellipses button) or press F3 to open as shown:



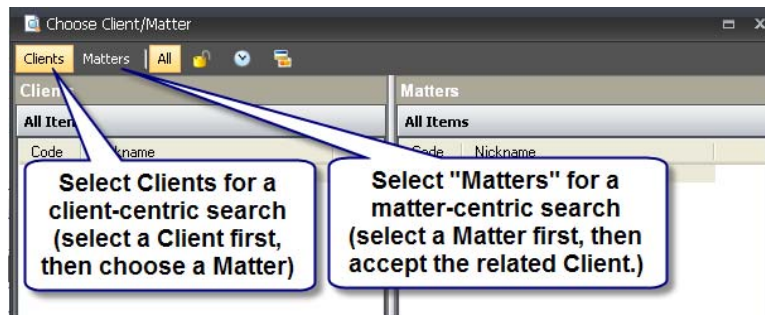


Once within the lookup, you can elect to search by beginning characters or by items containing the characters you enter.

If I am searching for Jane Smith Enterprises, I can perform a "Starts With" search and type in "Jane" as long as the Client Code or Client Name begin with JANE it will find the match.

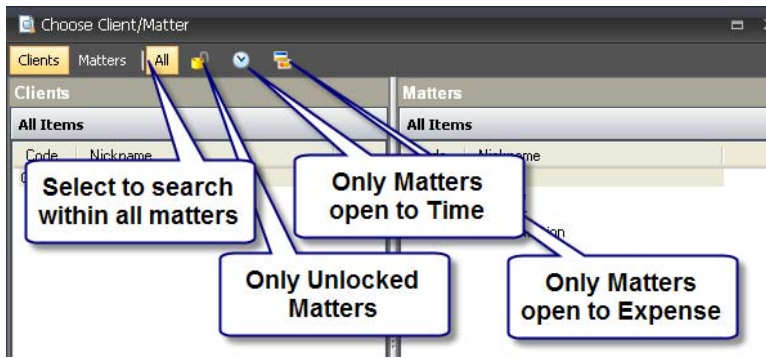


Now let's suppose that Jane Smith also has her personal estate plan with your firm. A "Starts With" search for Jane might not work if her matter is entered as Smith, Jane. However, click the "Starts With" button and it will change to "Contains". Now if you perform a search for Jane, both Jane Smith Enterprises and Smith, Jane will be returned as matches, as well as any other client that contains the name Jane.



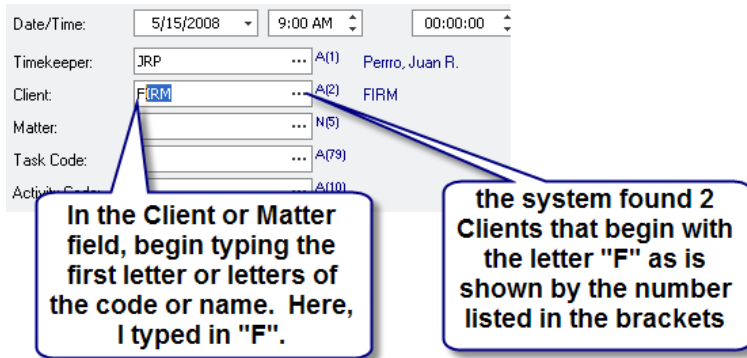
You may elect a client-centric or matter-centric search by selecting from within the lookup form using the buttons shown above. Once you make this setting, it remains in this setting until you change it, so searches in the Grid and Editor will remain using that setting even without having to open the lookup form.





Quick Lookups without opening the Lookup form

**From within the Editor**




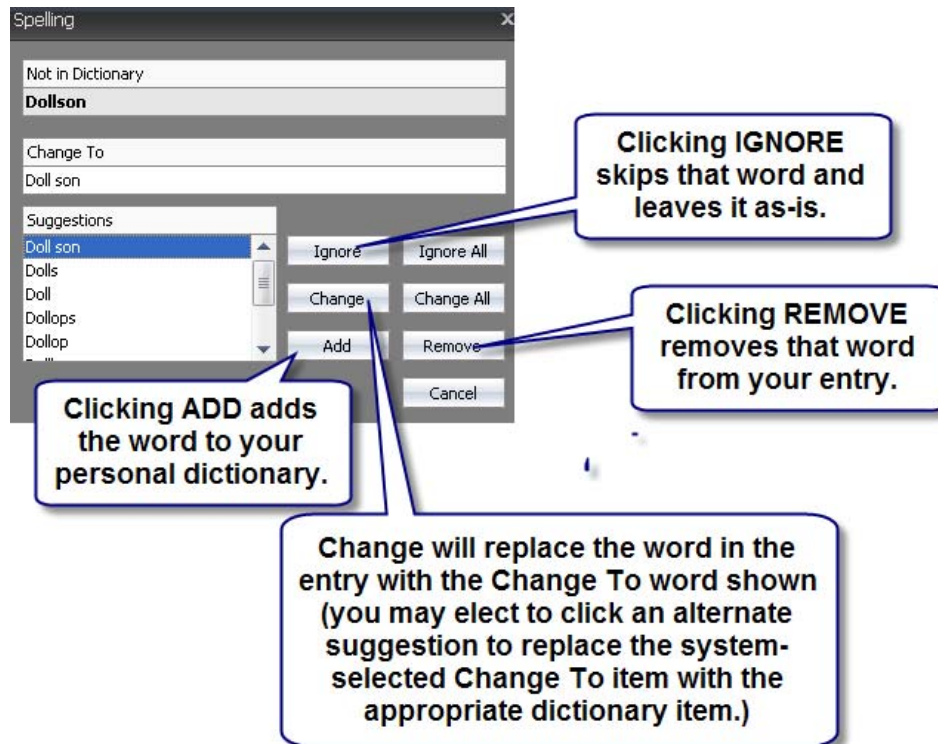
Simply press the up and down arrows on your keyboard to scroll through potential matches. Pres the tab key once you see the correct item displayed and the system will populate the Client field with that item.

**From within the Grid**

You can select Clients/Matters similar to the workflow shown above, but you must use the Ctrl + Up Arrow or Ctrl + Down Arrow keystroke combination to scroll through the potential matches for Client or Matter.

## SPELLING/SPELL CHECK

Pressing F7 or clicking the Spell Check icon  will spell check all entries selected. You must select all entry rows to spell check a group of entries. Spell check works as shown in the screen below:



### Removing an item added to your dictionary:

If you add a word to your dictionary by mistake – it can be removed. You must open your dictionary file, find the word and delete it. Here's how:

1. Locate your dictionary file
  - For XP machines, the file will be located in  
C:\Documents and Settings\{YourNetworkID}\Local Settings\Application Data\Juris\Dictionary
  - For Vista machines  
C:\Users\{YourNetworkID}\Local Settings\Application Data\Juris\Dictionary
  - For Citrix users your Dictionary will be on your personal profile. This profile will likely be located on one of the Citrix servers and not your local machine so you will need to ask your network technician to locate the dictionary file and make the change for you.
2. Open using NOTEPAD (not Word, WordPerfect or WordPad)
3. Find the word you wished you had not added and delete it from the file
4. Save the file and close.

# CLIENT/MATTER INQUIRY

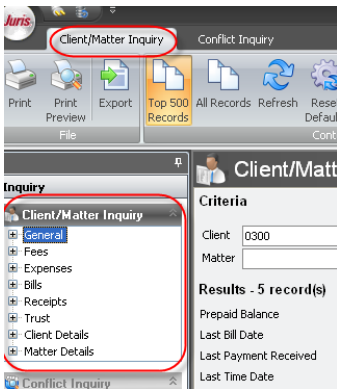
The Client/Matter Inquiry area allows a user to view detail about all Matters for a selected Client, or only specific Matters for a selected client.

## ACCESSING CLIENT/MATTER INQUIRY

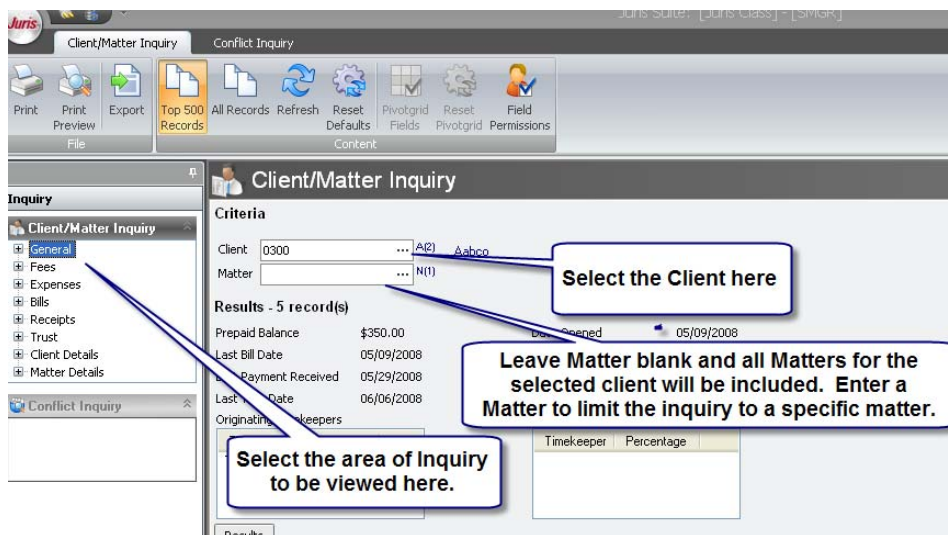
1. In Juris Suite, select the Inquiry snap-in



2. From within the Inquiry snap-in, select Client/Matter Inquiry.

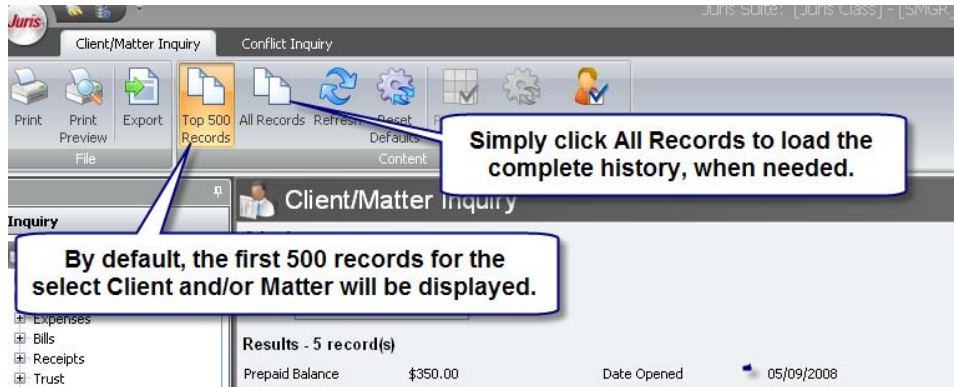


## VIEWING A CLIENT/ALL MATTERS, OR A PARTICULAR MATTER



## VIEWING RECENT RECORDS/ALL RECORDS

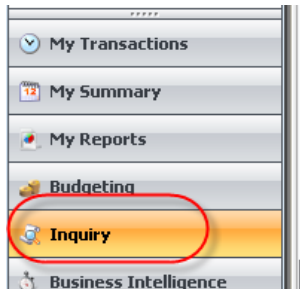
When viewing a Client and/or Matter, the system will load the recent records first. This is because many times, the user is only interested in the recent history (bills, fees, etc.). The All Records button may be selected to load the remaining records for the Client and/or Matter, when all history is needed.



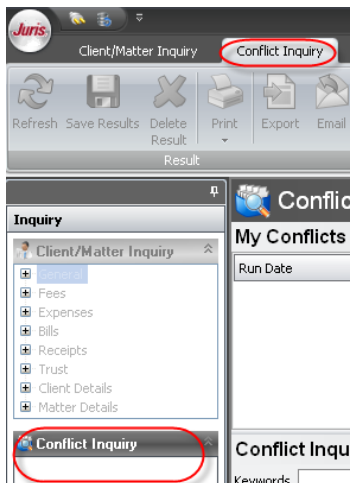
## CONFLICT INQUIRY

### ACCESSING CONFLICT INQUIRY

1. In Juris Suite, select the Inquiry snap-in



2. From within the Inquiry snap-in, select Conflict Inquiry.



## PERFORMING A CONFLCIT INQUIRY

Performing a Conflict Inquiry is easy. Simply enter keywords and click the Search icon,

The screenshot shows the 'Conflict Inquiry' web interface. At the top, there is a search bar with the text 'Av\* and copyright' and a 'Search' button. A callout box points to the search bar with the text 'Enter criteria here'. Another callout box points to the 'Search' button with the text 'Click Search icon'. Below the search bar, there is a 'Matches' section with a 'Custom' button. A callout box points to the results area with the text 'Hits are displayed here. Keywords found are highlighted.' The results are displayed in a table with the following data:

Date of Search	Search Pattern	Number of Hits
8/25/2008	Av* and copyright	2

Matter										
Field Name	Client Code	Matter Code	Client Nickname	Matter Nickname	Date Opened	Date Closed	Status Flag	Billing Timekeeper ID	Billing Timekeeper Name	Contents
Matter Description	0100	0001	Avant Technologies	Av-ware	5/9/2008		Open	DJM	Marris, Douglas J.	Av-ware Copyright
Matter Description	0100	0004	Avant Technologies	Avanformation	5/9/2008		Open	DJM	Marris, Douglas J.	Avanformation Copyright

Boolean operators and wildcards can be used in searches as follows:

1. **AND:** Instructs the system to return a match when one keyword and another keyword are both present within a field. The search *John Smith* would find all instances of John or Smith. The search *John and Smith* would only return matches when both keywords John and Smith are present.
2. **OR:** Instructs the system to return a match when either one or another keyword are present. The search *Jill or Smith* would return matches when either Jill or Smith is present. The search *Jill and (Smith or Jones)* would return a match for Jill Smith or Jill Jones.
3. **AND NOT:** Instructs the system to eliminate a keyword from the search. The search *Jones and not Allen* would return all records that contained the word Jones unless the field also contained the name Allen.
4. **\*** (asterisk): A wildcard that represents an unknown number of unknown characters. The search *ABC\** would consider a match anything that began with ABC (ABC Co., ABC Company, ABC Consulting, etc.)
5. **?** (question mark): A wildcard that represents a single unknown character. The search *Sm?th* would consider a match for Smith or Smyth.
6. **Date:** Most information in the Juris database are stored as text strings. When a date is stored in the database as a date field, it has to be searched for in a specific way. For example, the information on most available search fields in Juris, such as Notecards, Remarks, etc., are stored as text strings. Searching for a date that is entered in one of these fields would be performed in the same way as any other text string and would be done using the typical search rules. However, a UDF (user defined field) that is defined as a date field must be searched for in a different manner since it is formatted as a date and stored as such in the database. Dates must be searched for using the date format of MMM DD YYYY. (Three character month, two character day, four character year.)
7. **Quotes:** Placing quotes around search criteria will search only for that specific string. For example, the search "John Smith" would return a match only for fields containing John Smith in that specific string. Smith, John would not be considered a match.