



## **Sophisticated Reporting for Juris Suite Users of all Levels**

by

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### **Course Information**

Prerequisite	None
Field of Study	Law Firm Management
CPE Credit Hours	1

### **Author Biographies**

Kathy Baker-Elder has worked with Juris for over 20 years providing guidance, business consulting, training, and accounting consulting to law firms across the United States and Puerto Rico. Kathy is a Senior Consultant with LexisNexis and worked with Juris when it was still an independent company prior to acquisition by LexisNexis in 2007. She has specialized knowledge in Billing, Electronic Billing, Law Firm Accounting and is an expert in Juris/Juris Suite software. She has become a trusted advisor to and assisted hundreds of law firms across the country in developing the best business workflows and unique solutions for her clients.

Stan Graham, CPA is a CPA in the State of Ohio and is a Senior Consultant for LexisNexis; providing guidance, business consulting, and accounting consulting for law firms across the United States for over 11 years. He has a B.S. in Business (Accountancy) from Miami University in Oxford, Ohio and an MBA in Finance from the University of Cincinnati. Stan has specialized knowledge in Law Firm Accounting and is an expert in Juris software; an integrated billing and accounting software package designed for law firms which is owned by LexisNexis. He also maintains a small tax practice in the Dayton, Ohio area.

### **Course Description**

Critical business metrics and reports for effective decision-making at a law firm can range from Financial Statements, Compensation Calculations, Client Profitability, and Timekeeper Productivity to Working, Billing and Collection Reports. Key business decisions, such as staffing levels, compensation, personnel decisions, billing rates, collection efforts, and tax planning all rely on a suite of comprehensive and accurate reports that will need to be generated on a regular basis by the firm's administrative team. In addition, it's not enough to just generate these reports, but value must be added by understanding the underlying data and being able to communicate the meaning behind the numbers in a concise and easy to understand way, so that the correct decisions can be made in the quickest and most efficient manner possible.

This course will help the user to identify key reports and business metrics that are important to most law firms and how to use the Juris Suite Reporting module to organize these reports in an efficient manner to enable prompt and accurate reporting. In addition, users will learn how to find the story behind the numbers and how to impress their firm's leadership with value and quality of the reporting that you provide to them.



## Learning Objectives

Upon successful completion of *Sophisticated Reporting for Juris Suite Users of all Levels*, the user should be able to:

- Identify “Favorite” reports with corresponding and appropriate parameters.
- Use and create Report Folders for organization.
- View and further evaluate underlying data produced by the report query.
- Identify additional reports and data-gathering techniques for evaluating and understanding reports and the meaning behind the numbers.
- Communicate clearly and effectively the meaning of reports so that actionable decisions can be taken.