

LexisNexis Firm Manager™

Using LexisNexis Firm Manager™ Time and Expense Entries for Output into Microsoft® Word

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Introduction

LexisNexis Firm Manager provides a tool to organize, share and manage the activities in the law firm to include capturing time and expense. This white paper provides step-by-step instructions of how to get the time and expense being captured in LexisNexis Firm Manager into Word.

Who is this for?

For attorneys and firms who use the LexisNexis Firm Manager application for matter and law practice management.

What are the benefits?

The benefits of exporting billing entries from LexisNexis Firm Manager to then import and use in Word is the time you save not entering it twice, and minimizing the risk of data entry mistakes made during the process. Additionally, you continue to use the billing system you know.

What are the requirements?

- Users should have Microsoft Word
- LexisNexis Firm Manager exports time and expense entries in two formats: (1) CSV format and (2) Microsoft Excel format. For more details about a CSV file format, see the **appendix**. The appropriate format for importing entries will depend on the add-on utility being used.

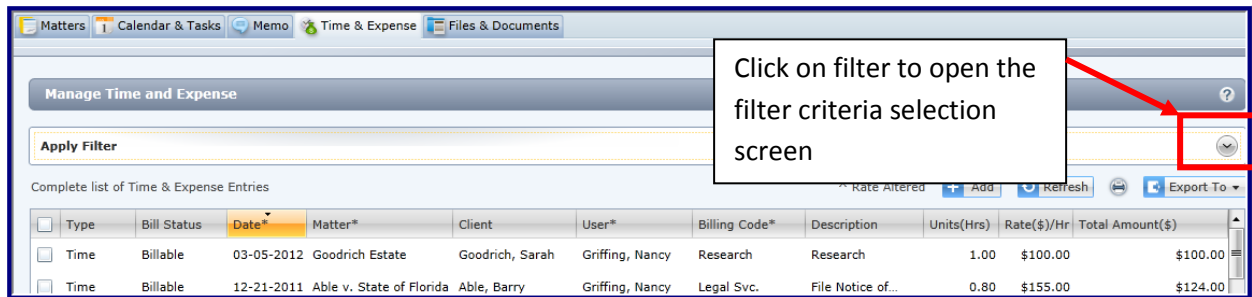
Getting Started

Before providing step-by-step instructions of how to export and import time and expense entries from LexisNexis Firm Manager into Word it's important to note that in LexisNexis Firm Manager only certain users have access to time and expense reports. If you are designated as the **Application Administrator, Managing Attorney or Billing Clerk**, you have access to run billing reports to include exporting time and expenses. Attorneys have the ability to run billing reports with their time and expenses but not for other billers, unless designated as a managing attorney or application administrator. An Application Administrator and Managing Attorney are the only two designated LexisNexis Firm Manager users who have access to **ADMIN TOOLS** in LexisNexis Firm Manager where you can add, edit and view user permissions. You can designate more than one Application Administrator for your firm.

How Do I Export?

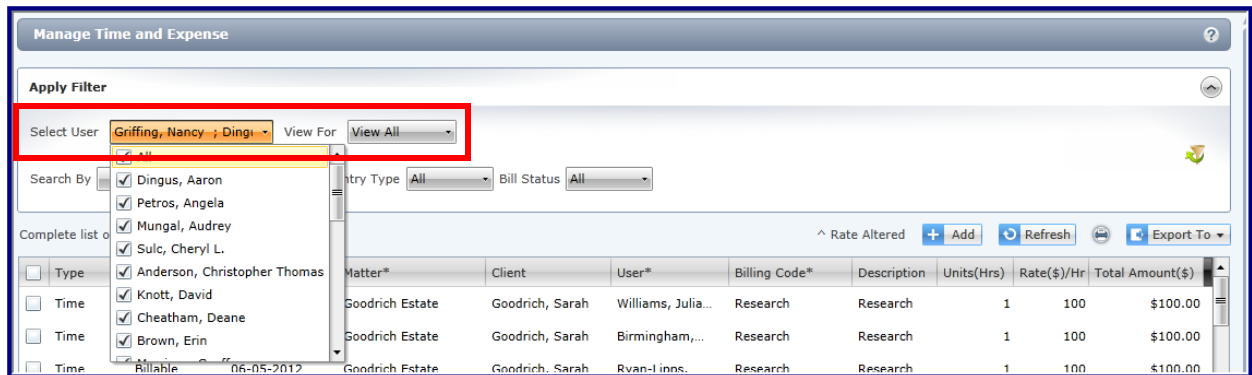
From LexisNexis Firm Manager

Go to the Time and Expense tab and then click on the apply filter “down arrow” to open up the filter criteria selection screen. It is recommended that you export time and expenses separately due the nature of the QuickBooks import requirements

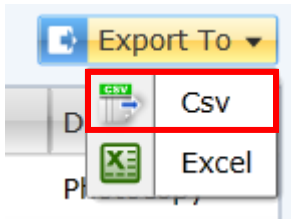


Let's begin by selecting the users and the time period for which you want to export. The defaults for filters are for time and expense entries, all client / matters, and bill statuses.

See screen below. If you are exporting time for all users for a certain period of time (for example: last month, or last week) select "ALL" under the **Select User** drop down box and select the **View For** field to choose the period you want. Otherwise, select your specific criteria for export such as: user, billing period, client/matter, entry type = time or expense; and bill status = billable, no charge, do not bill.



After making your selections, you'll see the filtered results of the time and expense that meet the criteria. Then click on the **Export To** button located to the right side of the time and expense entry list and select CSV. Save it in a location you can find easily.

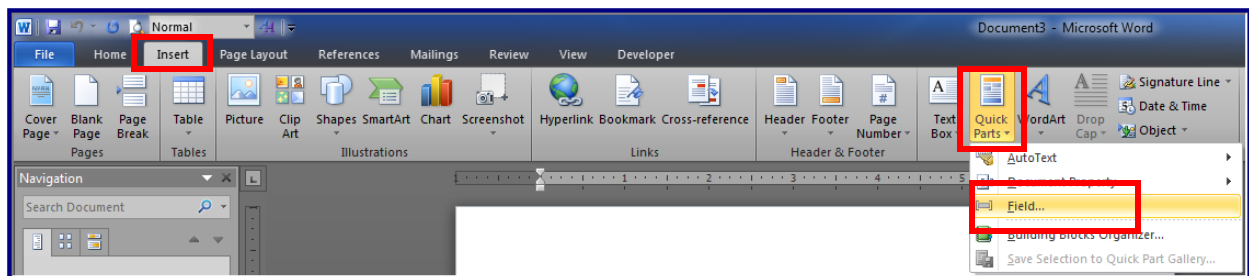


Save the file to a folder. It is recommended that the file name includes the period that represents the selected date range. For example, if you are exporting time for June, name the file:” LNFM_June.csv” and place it in a folder on a shared drive for easy access and reference.

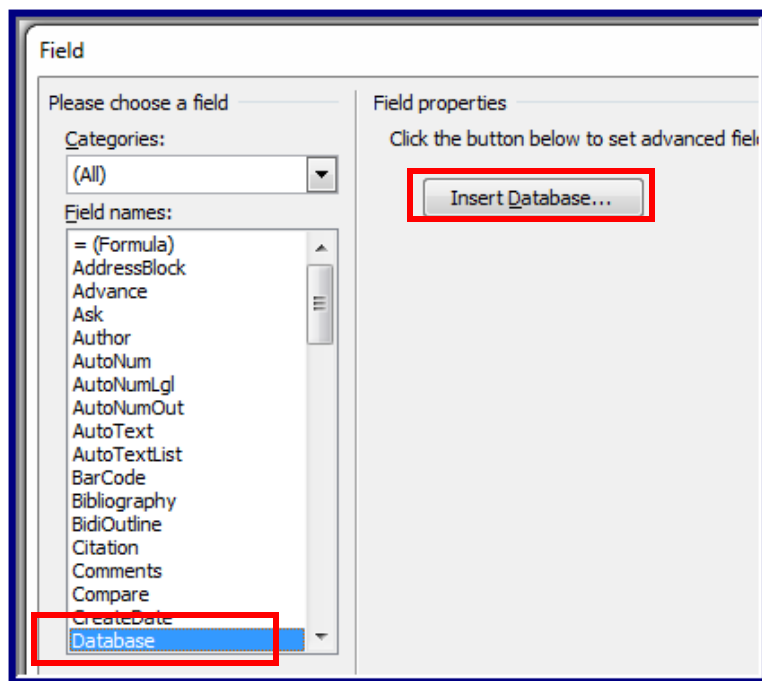
How Do I Import?

To Word

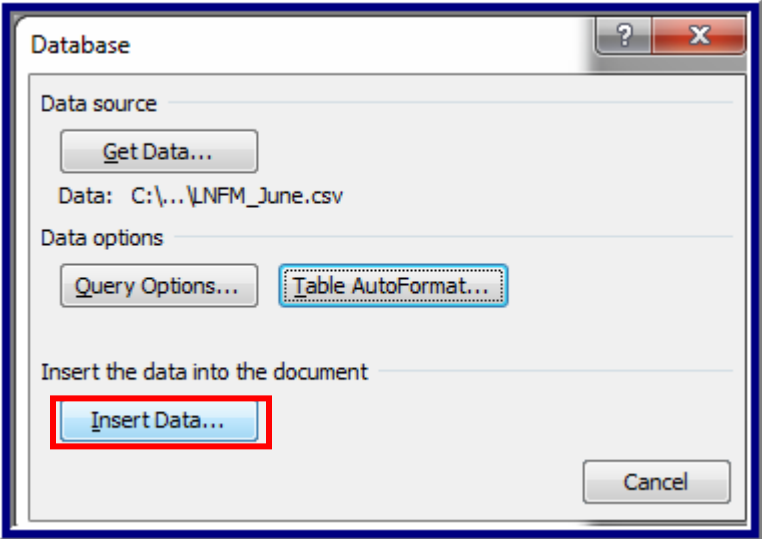
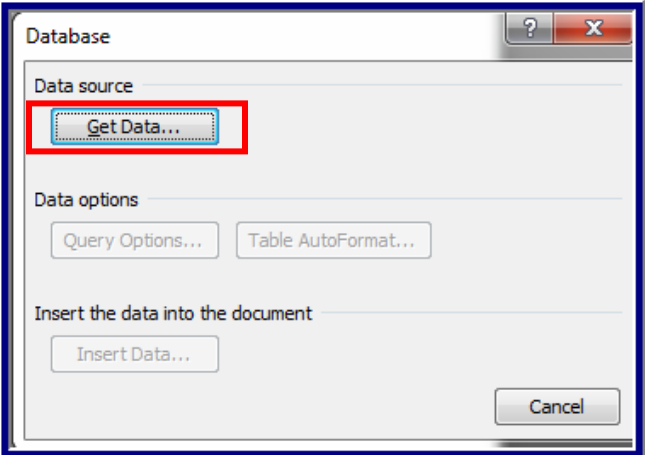
Open a new/existing Word document and on the Insert tab, click the Quick Parts Icon and choose the Field option.



Select the Database on the left-hand side and click the Insert Database... button



Click the Get Data button. Search and select the CSV export file you saved a few steps ago. Click the Open button to continue. Click the Insert Data... button to finish the import process. From this point you can format the layout to your liking as well as make grammar and spelling corrections.



Please note that this documentation is based on Word 2010 and if you currently have an older version the layout will not be exactly as the same above. The list is provided to assist you and does not constitute an endorsement of the specific product.

On-going maintenance required between LexisNexis Firm Manager

The client and matter details in LexisNexis Firm Manager will be specific to the management of the matter/case file.

Whether you can add new timekeepers, items or customer: jobs, during the import process will depend on the import program you are using. Regardless, you will probably need to go into Word after importing to complete and modify the layout.

The current version of LexisNexis Firm Manager does not mark the time and expense entries as exported. A best practice for exporting and importing time and expense is to develop a procedure to ensure you do not import time and expense entries more than once. For example, if you enforce that everyone enters their time into LexisNexis Firm Manager by the 2nd business day following the end of a month, then on the third business day, you export all time for the previous month, this ensures you are on a cadence and lessens the risk of multiple imports of the same time and expenses.

Appendix

What is a CSV file? From LexisNexis Firm Manager you can export your time and expense in a comma separated value file format otherwise referred to as a CSV file format. A CSV file contains the field information you enter into a time or expense record i.e. Date, Client and Matter, User, Duration, Rate, Bill Code, and Description. The comma (,) between each field record is what separates one field of information from another. You can use Microsoft Excel or Notepad to open up a CSV file. If you have a field that contains a comma, for example a matter named “Barry Able, Estate Planning”, putting quotations around the entire field will prevent it from being mistaken for Barry Able and Estate Planning being two separate fields.

CSV File Examples

To help you understand what is being sent from LexisNexis Firm Manager to QuickBooks there are a couple of examples below. One example illustrates the view as if you opened up the file in Microsoft® Excel™; the other in Notepad.

Example: If you open up the exported CSV file in Excel, you see each time or expense records in rows with information from the fields in separate columns.

Type	Bill Status	Date	Matter	Client	User	Billing Code	Units	Rate	Total Amount	Description
Time	Billable	5/11/2011	Boswinkel Aviation, Inc.	Boswinkel Aviation, Inc.	Brown, Robert S.	Court	1.3	\$300.00	\$390.00	Court Appearance
Expense	Billable	5/10/2011	Able v. State of Florida	Able, Barry	Brown, Robert S.	Photocopy	1	^ \$0.10	\$0.10	Photocopy

Using Notepad to view the exported billing records will reflect the native view of the file with commas separating each of the fields.

Type,Bill Status,Date,Matter,Client,User,Billing Code,Units,Rate>Total Amount,Status,Other Clients,Description

Time,Billable,5/11/2011,"Boswinkel Aviation, Inc. ","Boswinkel Aviation, Inc. ","Brown, Robert S. ",Court,1.3,\$300.00 ,\$390.00,Court Appearance

Expense,Billable,5/10/2011,Able v. State of Florida,"Able, Barry","Brown, Robert S. ",Photocopy,1,^ \$0.10,\$0.10,Photocopy