

Quick Reference Guide

There are 5 steps to create a new Litigation Matter:

1. Open the Litigation module.
2. Press New.
3. In the New Litigation Entry window, Keep Auto-Generate File Number Checked.
4. In the New Litigation Entry window, fill out all mandatory fields.
5. Press Create.

Standard Guide

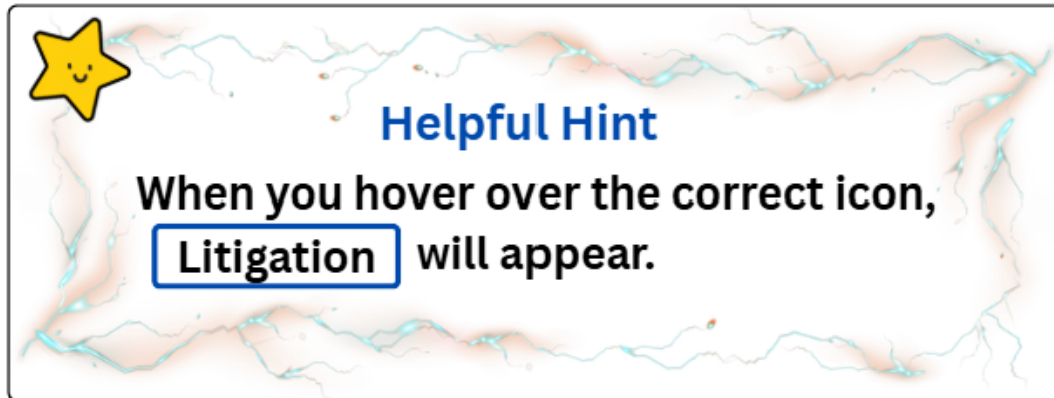
Step 1. Open the Litigation module.

There are 2 ways to open this module.

1-Step Option:

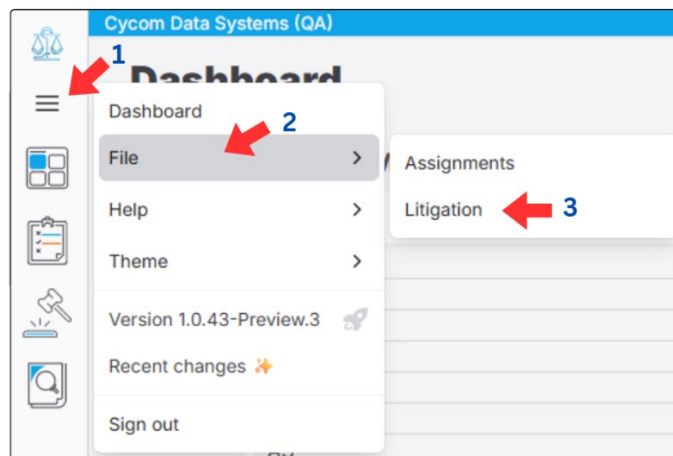
Press the **Litigation** icon on the **Global Toolbar**.





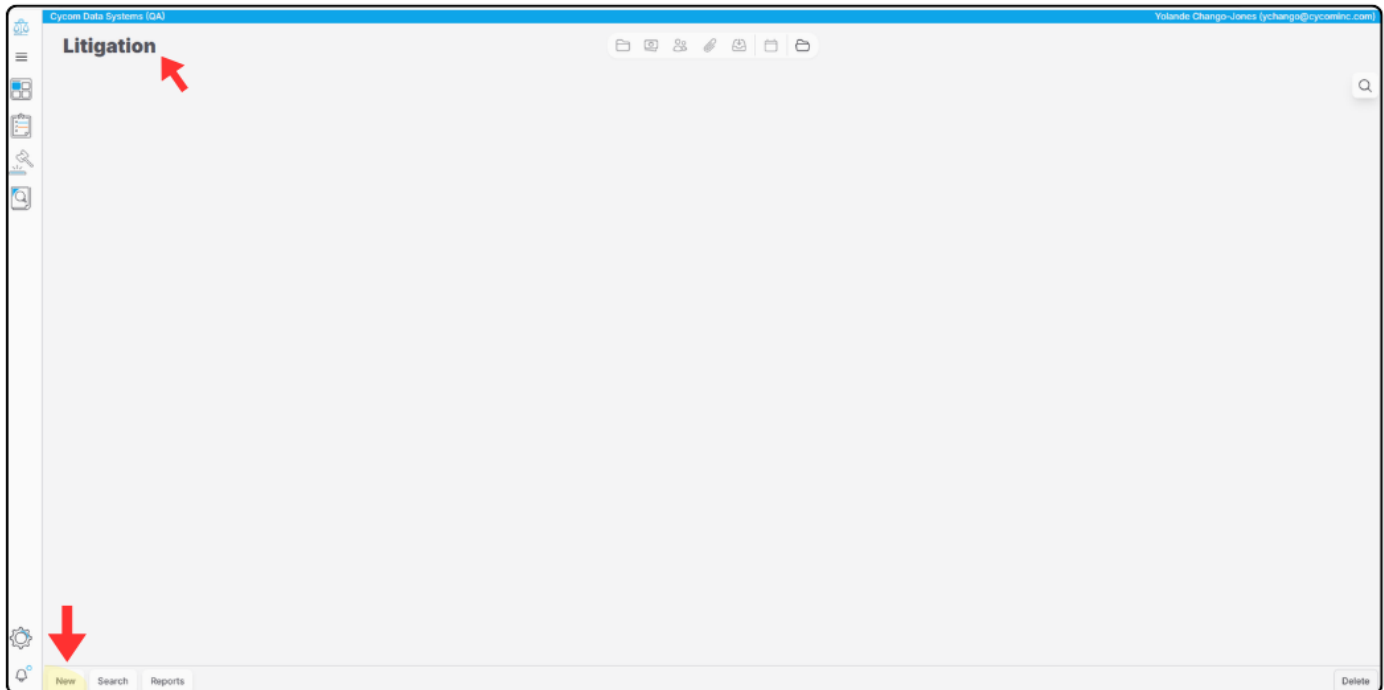
2-Step Option:

1. On the **Menu Bar**, press **File**.
2. Press **Litigation**.



Step 2. Press New.

The **New** button is located at the bottom-left corner of the screen.



Step 3. Keep Auto-Generate File Number checked in the New Litigation Entry window.

A **New Litigation Entry** window appears on completing Step 2. **Leaving the Auto-Generate File Number checked** will automatically generate a **File Number** for the new matter in accordance with the naming convention of your office. Uncheck the box if you wish to enter a file number manually.

Create New Litigation Matter – Best Practices



☒ Auto-Generate File Number

File Number
(Auto-generated)

Title

Common fields

Category
Select...

Type
Select...

Attorney
Select...

Team
Select...

Department
Select...

Client
Select...

Filed Date
mm/dd/yyyy

Open Date *
02/04/2026

Group
Select...

Cause
Select...

Other fields

#

Abstract

Attorney
Select...

Board
mm/dd/yyyy

Court
Select...

Incident Date
mm/dd/yyyy

Investigator
Select...

Judge
Select...

Location

Location Code

Primary Outside Counsel
Select...

Primary Staff
Select...

Short Description

Total Value

Cancel

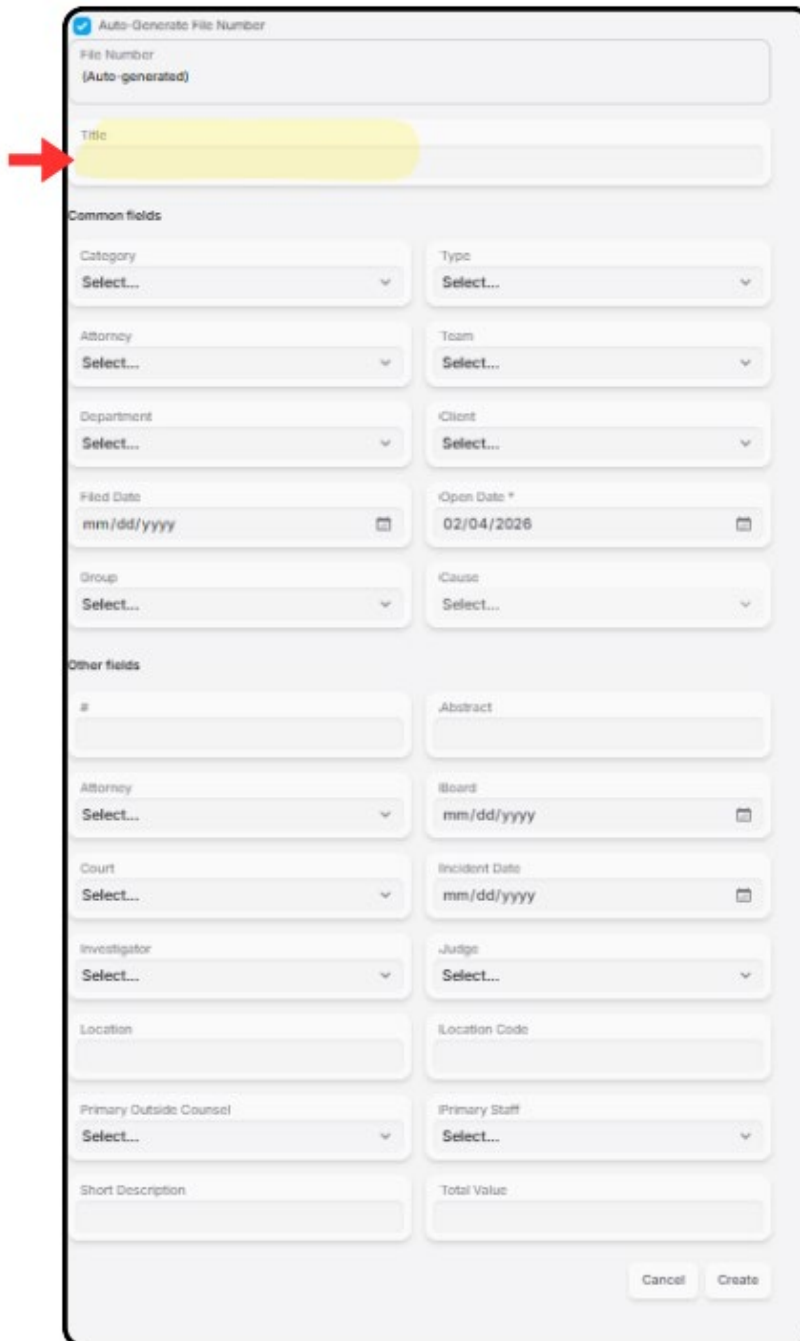
Create

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Create New Litigation Matter – Best Practices

Step 4. Fill out the mandatory fields in the New Litigation Entry window.

In the same **New Litigation Entry** window **fill in the Title, which is required**, and any other fields as needed or predetermined by the System Administrator.



☒ Auto-Generate File Number

File Number
(Auto-generated)

Title

Common fields

Category Select...	Type Select...
Attorney Select...	Team Select...
Department Select...	Client Select...
Filed Date mm/dd/yyyy	Open Date * 02/04/2026
Group Select...	Cause Select...

Other fields

#	Abstract
Attorney Select...	Board mm/dd/yyyy
Court Select...	Incident Date mm/dd/yyyy
Investigator Select...	Judge Select...
Location	Location Code
Primary Outside Counsel Select...	Primary Staff Select...
Short Description	Total Value

Cancel Create

Create New Litigation Matter – Best Practices

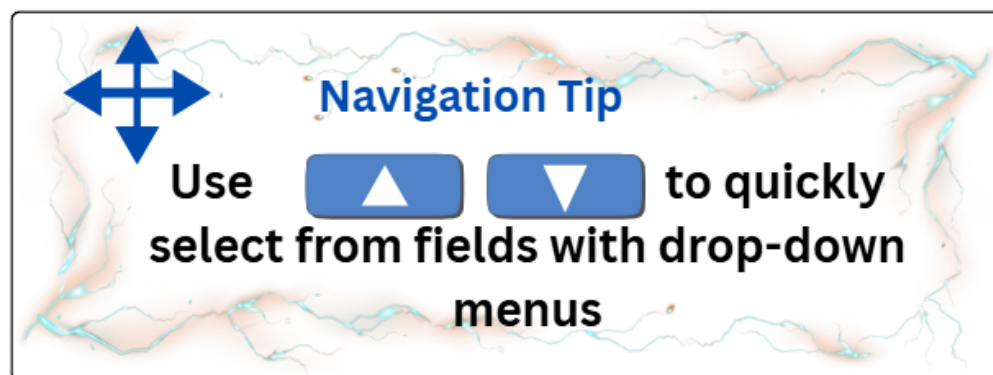
Looking for field descriptions?

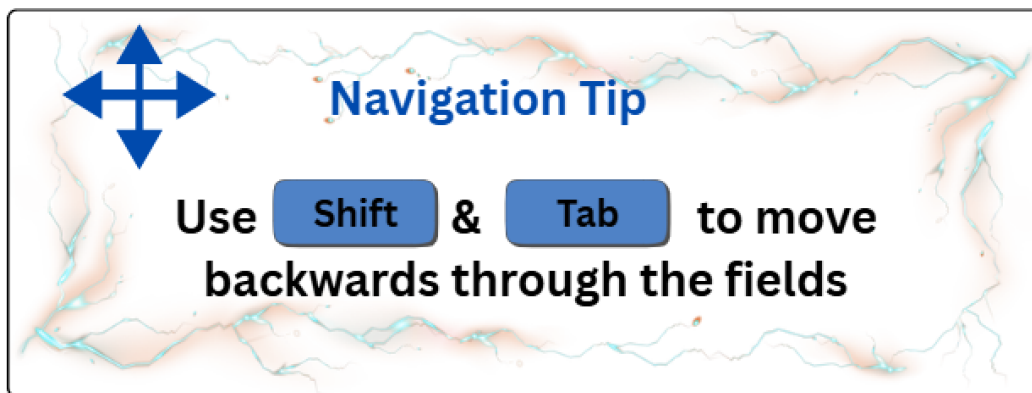
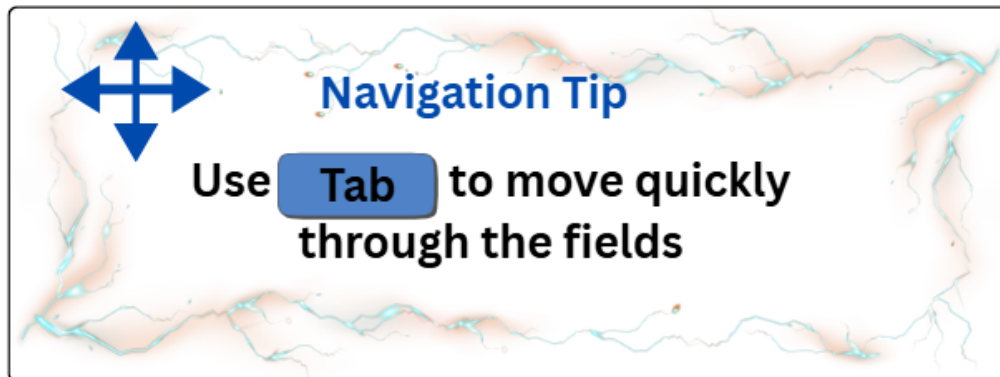
Check out the [New Litigation Entry Field Description Guide](#).



Mandatory fields are marked with an asterisk (*). The new litigation cannot be saved until values for these fields are provided. The word "**Required**" will appear in red if you try to save a new matter without values in these fields.

You can navigate from field to field using **Tab** and can cycle through drop-down lists with the up and down arrow keys. Using the **Shift + Tab** allows you to move backwards through the fields.





Step 5. Press Create.

The **Create** button is at the bottom-right corner of the **New Litigation Entry** window.

Create New Litigation Matter – Best Practices

☒ Auto-Generate File Number

File Number
(Auto-generated)

Title

Common fields

Category
Select...

Type
Select...

Attorney
Select...

Team
Select...

Department
Select...

Client
Select...

Filed Date
mm/dd/yyyy

Open Date *
02/04/2026

Group
Select...

Cause
Select...

Other fields

#

Abstract

Attorney
Select...

Board
mm/dd/yyyy

Court
Select...

Incident Date
mm/dd/yyyy

Investigator
Select...

Judge
Select...

Location

Location Code

Primary Outside Counsel
Select...

Primary Staff
Select...

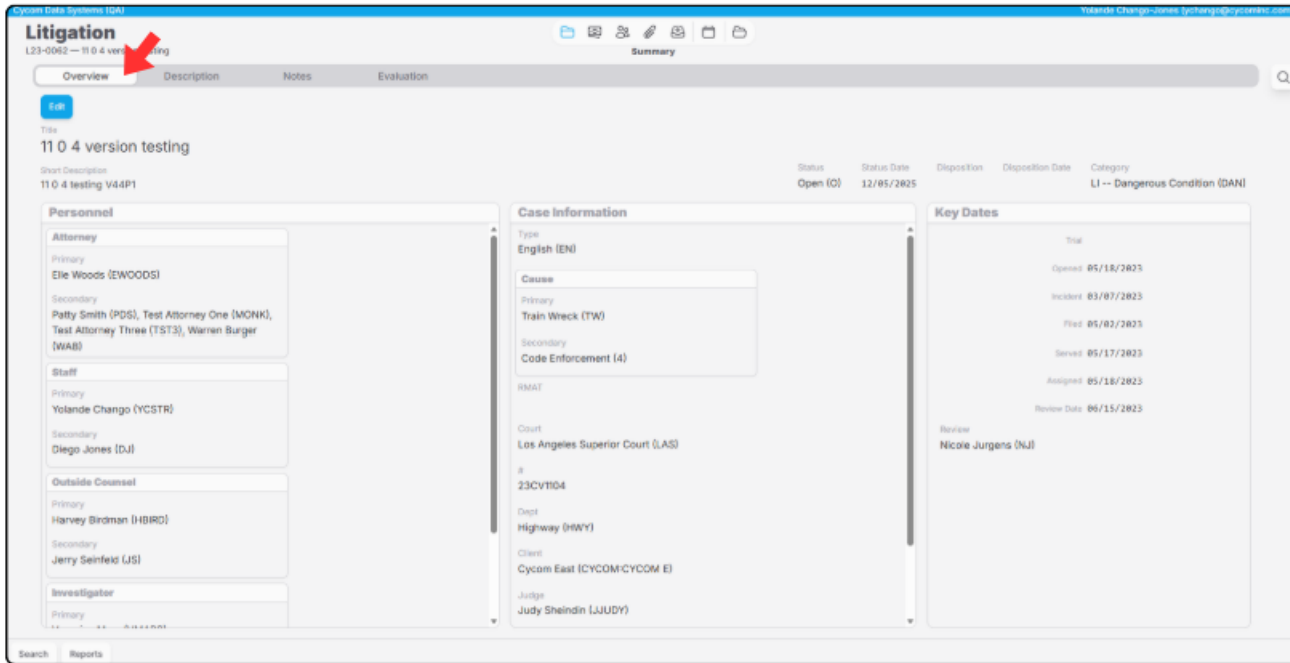
Short Description

Total Value

Cancel

Create

After saving, the **Overview Tab** of your new **Litigation** matter will appear.



The screenshot shows the 'Litigation' overview tab in the CYCOM Data Systems (GAT) interface. A red arrow points to the 'Overview' tab. The interface displays the following information:

- Title:** 1104 version testing
- Short Description:** 1104 testing V44P1
- Status:** Open (O)
- Status Date:** 12/05/2025
- Disposition:**
- Disposition Date:**
- Category:** LI -- Dangerous Condition (DAN)

The interface is divided into three main sections:

- Personnel:**
 - Attorney:**
 - Primary: Elle Woods (EWOODS)
 - Secondary: Patty Smith (PDS), Test Attorney One (MONK), Test Attorney Three (TST3), Warren Burger (WAB)
 - Staff:**
 - Primary: Yolande Chango (YCSTR)
 - Secondary: Diego Jones (DJ)
 - Outside Counsel:**
 - Primary: Harvey Birdman (HBRO)
 - Secondary: Jerry Seinfeld (JS)
 - Investigator:**
 - Primary:
- Case Information:**
 - Type: English (EN)
 - Cause:
 - Primary: Train Wreck (TW)
 - Secondary: Code Enforcement (4)
 - RMAT:
 - Court: Los Angeles Superior Court (LAS)
 - # 23CV1104
 - Dept: Highway (HWY)
 - Client: Cycom East (CYCOM-CYCOM E)
 - Judge: Judy Sheindin (JUDY)
- Key Dates:**
 - Trial
 - Opened: 05/18/2023
 - Incident: 03/07/2023
 - Filed: 05/02/2023
 - Served: 05/17/2023
 - Assigned: 05/18/2023
 - Review Date: 06/15/2023
 - Review: Nicole Jurgens (NJ)

New Litigation Entry Field Description Guide

1. [Title](#)
2. [Short Description](#)
3. [Status](#)
4. [Status Date](#)
5. [Disposition](#)
6. [Disposition Date](#)
7. [Category](#)

Personnel

1. [Attorney](#)

Create New Litigation Matter – Best Practices

- [Primary](#)
 - [Secondary](#)
- 2. [Staff](#)
 - [Primary](#)
 - [Secondary](#)
- 3. [Outside Counsel](#)
 - [Primary](#)
 - [Secondary](#)
- 4. [Investigator](#)
 - [Primary](#)
 - [Secondary](#)
- 5. [CCP1](#)

Case Information

- 1. [Type](#)
- 2. [Cause](#)
 - [Primary](#)
 - [Secondary](#)
- 3. [Track](#)
- 4. [Court](#)
- 5. [Court Number \(#\)](#)
- 6. [Department \(Dept\)](#)
- 7. [Account](#)
- 8. [Judge](#)
- 9. [Magistrate](#)
- 10. [Funding Source](#)

Key Dates

- 1. [Opened Date](#)
- 2. [Incident](#)
- 3. [Filed](#)
- 4. [Served](#)
- 5. [Assigned](#)
- 6. [Review Date](#)
- 7. [Review](#)

The configuration of the CityLaw/CountyLaw NG installation in your office determines which fields are mandatory or disabled, and which fields are visible. If you discover an issue with the field configuration in the New Litigation Entry window, please contact your System Administrator.

1. Title

The name of the new matter.

This is a mandatory field.

2. Short Description

A short description of the matter.

3. Status

The status of the matter, generally Open.

4. Status Date

The date the status was last changed.

5. Disposition

The disposition details for the matter. Disposition includes a disposition code identifying how the matter was disposed, as well as a disposition date identifying when the matter was dispositioned.

6. Disposition Date

the date the matter was dispositioned.

7. Category

Category codes separate **Litigation** matters into classifications relevant to your office. Some examples of categories are Contracts, Ordinances, Opinions, and Resolutions.

Personnel

1. Attorney

The attorney to whom the matter was given.

Primary: If you are an attorney, this field will auto-populate with your username.

Secondary: An additional attorney (maximum of **four** may be selected), if applicable.

2. Staff

The staff assigned to the matter, or the staff responsible for managing the entry of this matter. A primary and an unlimited number of secondary staff may be entered.

3. Outside Counsel

Outside Counsel used on the matter. A primary and an unlimited number of secondary outside counsel may be entered.

4. Investigator

The investigator to which the matter is assigned. A Primary and an unlimited number of secondary investigators may be entered.

5. CCP

The Criminal Complaint Phase.

Case Information

1. Type

Each Category code has a subset of Type codes. Some examples of type codes are Procurement, Licensing, Civil Rights, Personnel, and Zoning.

2. Cause

The cause code for the matter. A primary (only one) and secondary (maximum five) causes may be entered.

3. Track

A tracking code to identify the matter handling process.

4. Court

The code for the court that will see the matter.

5. Court Number (#)

The court filing number or a specific courtroom number for a matter. This is predetermined by the **System Administrator** or **Office Manager** at your office.

7. Department (Dept)

The Department field represents the entity to whom the services of the Litigation matter are being rendered.

8. Account/Client/Customizable Field Name

This field is often used to mirror the Department's Financial account field. The account to which expenses for the matter are applied.

6. Judge

The judge that will preside over the matter.

7. Magistrate

The magistrate connected to the matter. This is an optionally visible field on the basic tab.

8. Funding Source

The fund from which the claims or settlement from the matter may be paid.

Key Dates

1. Opened Date

The date the matter was opened.

2. Incident

The date of the incident.

3. Filed

The date the matter was filed.

4. Served

The date the matter was served.

5. Assigned

The date the matter was assigned to the attorney.

6. Review Date

The date the case is to be reviewed.

7. Review

The staff whose responsibility it is to review the matter.