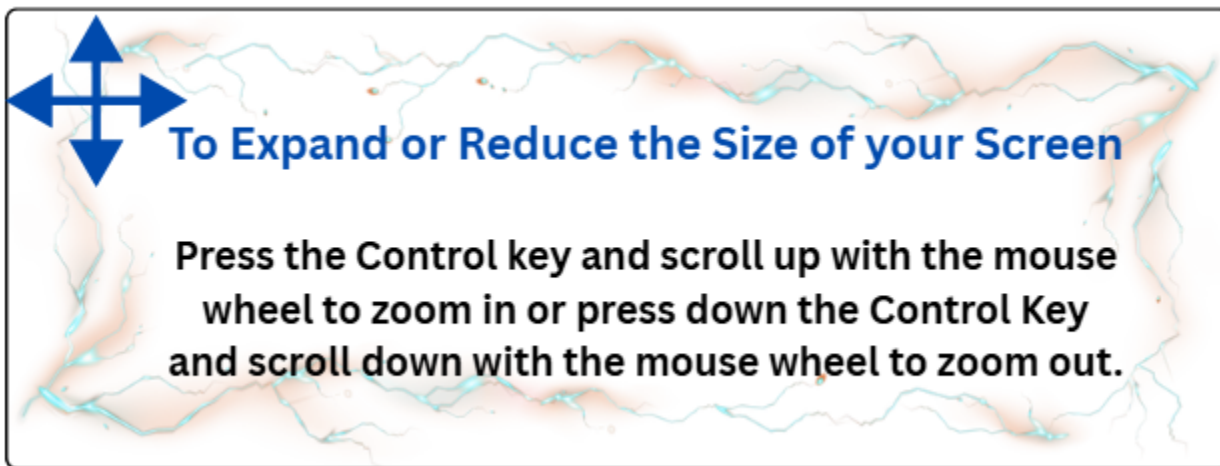


These notes are provided by **Cycom Data Systems, Inc.** to support the use of **CLNG (CityLaw/CountyLaw Next Gen)** and are intended to be used for review of general topics covered during training.

If you discover an error in this document, or if you encounter any problems performing any steps described, please contact **Cycom Support** at support@cycominc.com or by calling **888-292-6688**.

Helpful Hint:



Matter Calendar

The **Matter Calendar** in **CityLaw/CountyLaw NG** is a **calendar manager** within each module, represented by the calendar icon in the **module toolbar**. It is **specific to each matter's** schedules such as appointments, due dates, ticklers, etc. A user can **search, filter** for specific events, or print a **report** of all the events within a matter.

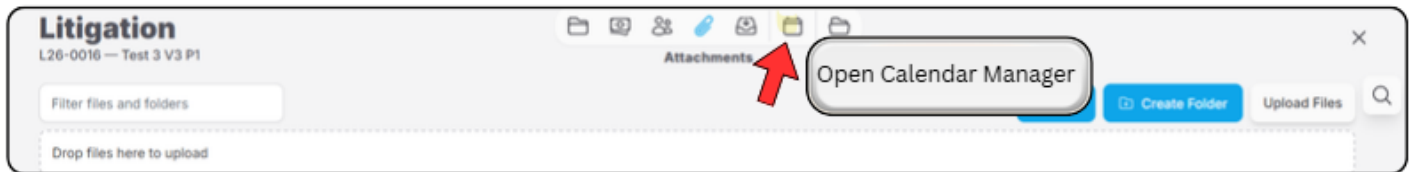
Create Calendar Events on a Matter

Contents:

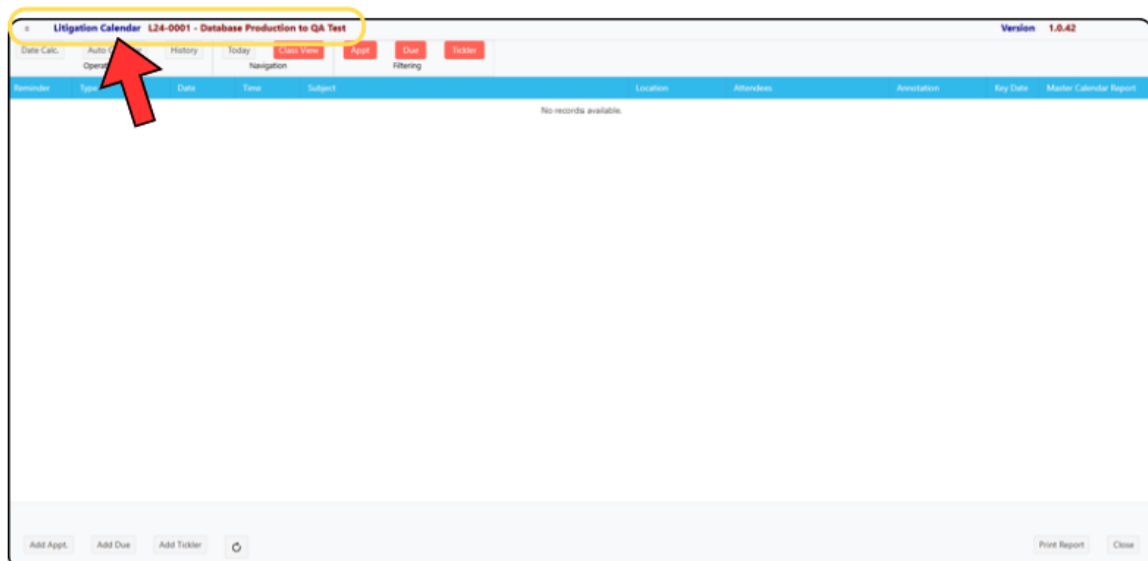
- **General Operation**
- **Creating New Calendar Events**
- **Editing Events**
- **Disposition Events**

General Operation

While **in a Matter** and you hover over the **calendar** icon, the label "**Open Calendar Manager**" will show.

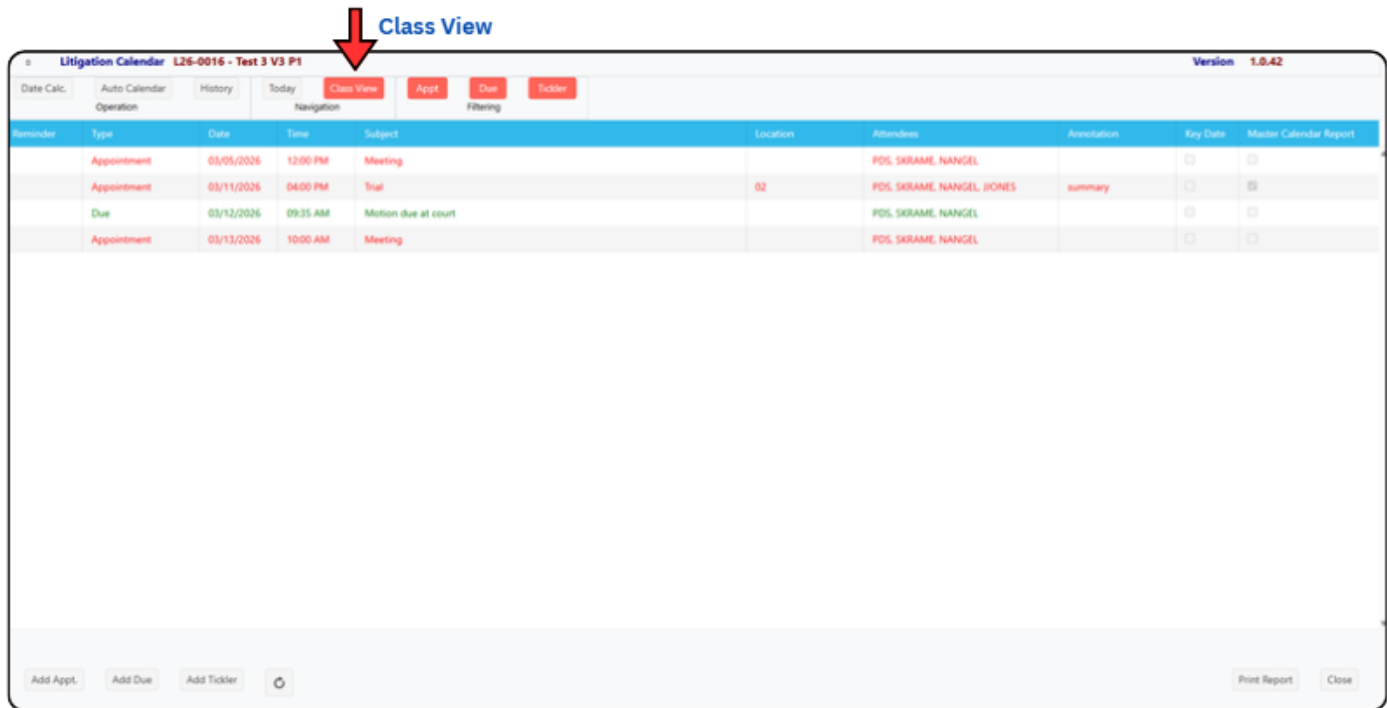


To Open the Calendar Manager, click the icon. A new window will open in a separate tab in the browser labeled with **the name of the module you are in and the word Calendar**, as in our example below the module is Litigation therefore the calendar is labeled **Litigation Calendar**. The matter **file# and name** will follow.



Create Calendar Events on a Matter

By default, the **initial display** view will be the **Class View**.



All events, Appointments, Due dates and Ticklers will be listed in the **Class View**. Double-click on any of these scheduled events to reopen and edit. **When selected** the buttons will turn **red**. The Class View, Appt, Due, and Tickler toggle buttons are selected by default.

To Filter for only one of the three, Appt, Due, or Tickler simply deselect the ones you don't need. The list you filtered for will be the only one showing in the **Class view**.

There are three panels at the top of the currently displayed calendar view.

Operation includes these options: **Date Calculator (Calc.)**, **Auto Calendar**, **History**.

Navigation includes these options: **Today**, **Class View**.

Filtering includes these options: Appointment (**Appt**), **Due**, **Tickler**.

Create Calendar Events on a Matter

Litigation Calendar

L26-0016 - Test 3 V3 P1

Version 1.0.42

Date Calc.

Auto Calendar

History

Today

Class View

Appt

Due

Tickler

Operation

Navigation

Filtering

Reminder	Type	Date	Time	Subject	Location	Attendees	Annotation	Key Date	Master Calendar Report
	Appointment	03/05/2026	12:00 PM	Meeting		PDS, SKRAME, NANGEL		☐	☐
	Appointment	03/11/2026	04:00 PM	Trial	02	PDS, SKRAME, NANGEL, JONES	summary	☐	☒
	Due	03/12/2026	09:35 AM	Motion due at court		PDS, SKRAME, NANGEL		☐	☐
	Appointment	03/13/2026	10:00 AM	Meeting		PDS, SKRAME, NANGEL		☐	☐

Add Appt.

Add Due

Add Tickler

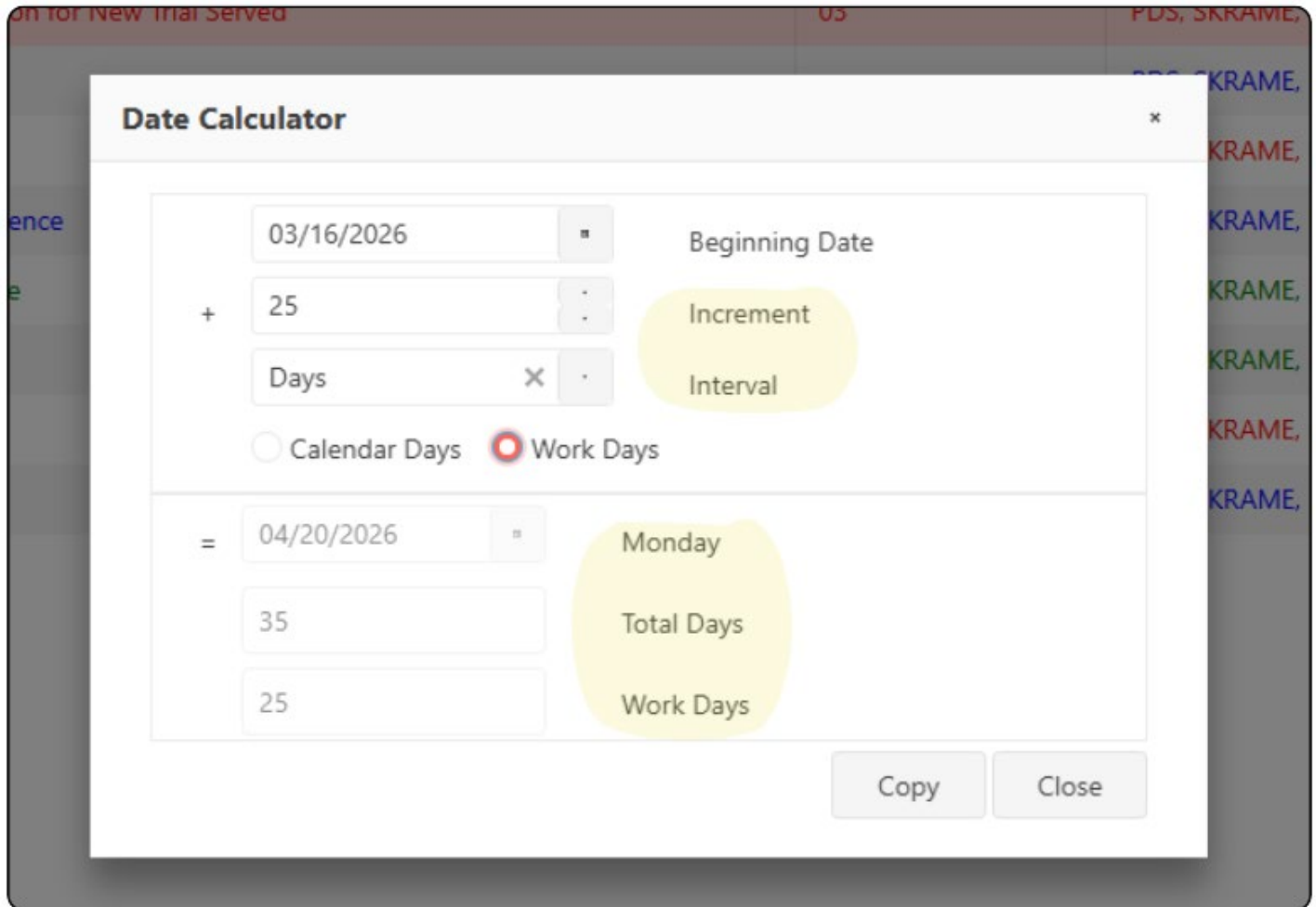
Print Report

Close

Operation:

Date Calc. - a date calculator to assist with scheduling future events. You can calculate based on increments of days, weeks, months, or years (interval). The drop downs within each field will offer options.

Create Calendar Events on a Matter



The screenshot shows a "Date Calculator" dialog box with the following fields and labels:

- Beginning Date:** 03/16/2026
- Increment:** 25
- Interval:** Days
- Calendar Days:** ☐
- Work Days:** ☒
- Monday:** 04/20/2026
- Total Days:** 35
- Work Days:** 25

Buttons: Copy, Close

Auto Calendar – an automated date calculation engine to generate Trigger deadlines (which requires a third-party subscription to Calendar Rules).

Create Calendar Events on a Matter

Litigation Calendar L26-0004 - Cal Mgr Test Matter for Jury Trial Spanning Multiple Days Version 1.0.42

Date Calc: **Auto Calendar** History Today **Class View** **Appt** **Due** **Tickler**

Operation Navigation Filtering

Reminder	Type	Date	Time	Subject	Location	Attendees	Annotation	Key Date	Master Calendar Report
	Due	05/06/2026	01:00 AM	Meeting		VMARS		☐	☐
	Due	05/06/2026	01:00 AM	Meeting		VMARS		☐	☐
	Due	04/20/2026		Professional Negligence Cases Against Health Care Provider - L/D to File and Serve Motio...		Bl, Bl, SP, NJ, LHUTZ	test annotation	☐	☐
	Due	06/10/2026		Reminder: Consider Contacting Court to Confirm Motion Date Availability in Anticipation ...		Bl, Bl, SP, NJ, LHUTZ	test annotation	☐	☐
	Due	06/11/2026		L/D to Serve Motion for Summary Judgment (Mail outside U.S.) (Based on Trial Da...		Bl, Bl, SP, NJ, LHUTZ	test annotation	☐	☐
	Due	06/21/2026		L/D to Serve Motion for Summary Judgment (Mail outside State) (Based on Trial Date)		Bl, Bl, SP, NJ, LHUTZ	test annotation	☐	☐
	Due	06/24/2026		L/D to Serve Motion for Summary Judgment (Mail) (Based on Trial Date)		Bl, Bl, SP, NJ, LHUTZ	test annotation	☐	☐
	Due	06/29/2026		L/D to Serve Motion for Summary Judgment (Electronic/Fax/Overnight) (Based on Trial Da...		Bl, Bl, SP, NJ, LHUTZ	test annotation	☐	☐
	Due	10/01/2026		L/D to Serve Motion for Summary Judgment (Hand) and File with Court (Based on Trial Da...		Bl, Bl, SP, NJ, LHUTZ	test annotation	☐	☐
	Due	10/16/2026		Reminder: Contemplate Final Discovery and Serve in Time to Bring Motion to Compel		Bl, Bl, SP, NJ, LHUTZ	test annotation	☐	☐
	Due	10/22/2026		L/D to File Stipulation to Mediate		Bl, Bl, SP, NJ, LHUTZ	test annotation	☐	☐
	Due	10/22/2026		Case Filed on/after January 1, 2024: L/D to Propound Supplemental Demand for Initial Dis...		Bl, Bl, SP, NJ, LHUTZ	test annotation	☐	☐
	Due	10/30/2026		L/D to Serve Written Discovery (Mail Outside U.S.)		Bl, Bl, SP, NJ, LHUTZ	test annotation	☐	☐
	Due	10/30/2026		L/D to Serve Demand for Physical Examination if Plaintiff Seeking Recovery for Personal Inj...		Bl, Bl, SP, NJ, LHUTZ	test annotation	☐	☐
	Due	11/05/2026		L/D to Serve Notice of Motion to bifurcate if No Pretrial Conference Held (Mail Outside U...		Bl, Bl, SP, NJ, LHUTZ	test annotation	☐	☐
	Due	11/09/2026		L/D to Serve Subpoena Duces Tecum and Notice of Privacy Rights on Consumer or Emplo...		Bl, Bl, SP, NJ, LHUTZ	test annotation	☐	☐
	Due	11/10/2026		L/D to Serve Demand for Physical Examination if Plaintiff Seeking Recovery for Personal Inj...		Bl, Bl, SP, NJ, LHUTZ	test annotation	☐	☐
	Due	11/10/2026		L/D to Serve Written Discovery (Mail Outside State)		Bl, Bl, SP, NJ, LHUTZ	test annotation	☐	☐
	Due	11/12/2026		L/D to Serve Demand for Exchange of Expert Witnesses (or 10 Days After Initial Trial Date ...		Bl, Bl, SP, NJ, LHUTZ	test annotation	☐	☐
	Due	11/13/2026		L/D to Serve Notice of Motion to Bifurcate if No Pretrial Conference Held (Mail Outside St...		Bl, Bl, SP, NJ, LHUTZ	test annotation	☐	☐
	Due	11/16/2026		L/D to Serve Written Discovery (Mail)		Bl, Bl, SP, NJ, LHUTZ	test annotation	☐	☐
	Due	11/16/2026		L/D to Serve Demand for Physical Examination if Plaintiff Seeking Recovery for Personal Inj...		Bl, Bl, SP, NJ, LHUTZ	test annotation	☐	☐
	Due	11/17/2026		L/D to Serve Written Discovery (Electronic/Fax/Overnight)		Bl, Bl, SP, NJ, LHUTZ	test annotation	☐	☐

Add Appt. Add Due Add Tickler Print Report Close

The **Auto Calendar** includes three panels side by side: **Triggers**, associated **Events**, and **Details**.

Calendar Manager **Litigation Calendar L26-0004 - Cal Mgr Test Matter for Jury Trial Spanning Multiple Days** Version 1.0.42

Date Calc: **Auto Calendar** History Today **Class View** **Appt** **Due** **Tickler**

Operation Navigation Filtering

Triggers

Date	Subject
01/20/2027	Jury Trial
01/20/2027	Jury Trial
01/20/2027	Jury Trial
01/20/2027	Jury Trial

Events

Date	Subject
04/20/2026	Professional Negligence Cases Against Health Care Provid...
06/10/2026	Reminder: Consider Contacting Court to Confirm Motion ...
06/11/2026	L/D to Serve Motion for Summary Judgment (Mail outside ...
06/21/2026	L/D to Serve Motion for Summary Judgment (Mail outside ...
06/24/2026	L/D to Serve Motion for Summary Judgment (Mail) (Based ...
06/29/2026	L/D to Serve Motion for Summary Judgment (Electronic/Fa...
10/01/2026	L/D to Serve Motion for Summary Judgment (Hand) and R...
10/16/2026	Reminder: Contemplate Final Discovery and Serve in Time ...
10/22/2026	L/D to File Stipulation to Mediate
10/22/2026	Case Filed on/after January 1, 2024: L/D to Propound Supp...
10/30/2026	L/D to Serve Written Discovery (Mail Outside U.S.)
10/30/2026	L/D to Serve Demand for Physical Examination if Plaintiff S...
11/05/2026	L/D to Serve Notice of Motion to Bifurcate if No Pretrial C...
11/09/2026	L/D to Serve Subpoena Duces Tecum and Notice of Privac...
11/10/2026	L/D to Serve Demand for Physical Examination if Plaintiff S...
11/10/2026	L/D to Serve Written Discovery (Mail Outside State)
11/12/2026	L/D to Serve Demand for Exchange of Expert Witnesses (or ...
11/13/2026	L/D to Serve Notice of Motion to Bifurcate if No Pretrial C...
11/16/2026	L/D to Serve Written Discovery (Mail)
11/16/2026	L/D to Serve Demand for Physical Examination if Plaintiff S...
11/17/2026	L/D to Serve Written Discovery (Electronic/Fax/Overnight)
11/17/2026	L/D to Serve Demand for Physical Examination if Plaintiff S...

Details

Original Trigger: Jury Trial
Showing: Event

Litigation Calendar L26-0004 - Cal Mgr Test Matter for Jury Trial Spanning Multiple Days

Date: 06/10/2026 **81 days before triggering event. Adjustment: do nothing.**

Subject: Reminder: Consider Contacting Court to Confirm Motion Date Availability in Anticipation of Filing Motion for Summary Judgment or Adjudication

Attendees: Bl, Bl, SP, NJ, LHUTZ

Annotation: test annotation

Description: CCP 437.5(a)
 California Code of Civil Procedure
 Summary Judgments and Motions for Judgment on the Pleadings (a)(1) A party may move for summary judgment in an action or proceeding if it is contended that the action has no merit or that there is no defense to the action or proceeding. The motion may be made at any time after 60 days have elapsed since the general appearance in the action or proceeding of each party against whom the motion is directed or at any earlier time after the general appearance that the court, with or without notice and upon good cause shown, may direct. (2) Notice of the motion and supporting papers shall be served on all other parties to the action at least 81 days before the time appointed for hearing. If the notice is served by mail, the required 81-day period of notice shall be increased by 5 days if the place of address is within the State of California, 10 days if the place of address is outside the State of California but within the United States, and 20 days if the place of address is outside the United States. If the notice is served by facsimile transmission, express mail, or another method of delivery providing for overnight delivery, the required 81-day period of notice shall be increased by two court days. (3) The motion shall be heard no later than 30 days before the date of trial, unless the court for good cause orders otherwise. The filing of the motion shall not extend the time within which a party must otherwise file a responsive pleading.

Edit Trigger Delete Triggers Edit Event Delete Events Print Triggers Print Report Close

History - All completed/archived events can be found here.

Navigation:

Today - when the Class View is unselected it **defaults to the current day's events** calendar. From here you can choose to view the Week's or Month's events depending on the settings you select.

Class View - this is the default view when the Module Calendar is opened within a matter. It contains the list of all the events connected to the matter.

Filtering:

Appt - Appointments relating to the current open matter.

Due - Events with a date deadline but without a time associated with it. For example, the last day to file a motion.

Tickler – A reminder the user sets.

Creating New Calendar Events

You can add appointments, due dates, and ticklers using the buttons in the bottom left corner:



The following fields will be **auto populated**: **Module Name**, **File #**, **Court** (will be checked if entered for the matter), the **code/name of the staff** creating the event, and the **Attendees** (the names of the **Attorneys and Investigators** on this matter).

Create Calendar Events on a Matter

Add Appointment

Show As Select an item...
Class Appointment

Court

Entered YCSTR

Module Litigation
File # L26-0016
Start Time 03/11/2026 12:00 PM
End Time 03/11/2026 01:00 PM
Subject
Team Select an item...
Location
Annotation

Triggers Enter Trigger
Title Test 3 V3 P1

Calendar Type Select an item...
Is Trial Date

Disposition
Remarks
Disposition Date MM/dd/yyyy

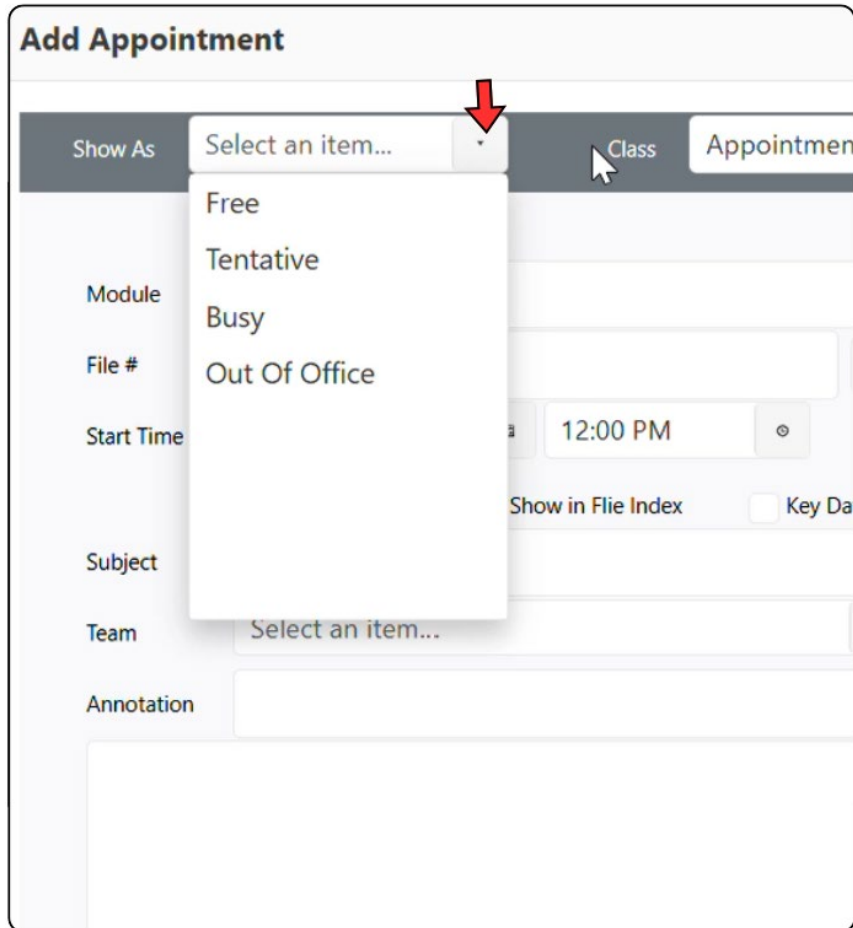
Complete Reschedule Cancel Item Clear

Attendees
NANGEL - Nicholas Angel
PDS - Patty Smith
SKRAME - Steven Kramer

Save
Cancel

The **Show As** field, at the top left in the grey banner, can be used if your office is set up with Outlook integration. If it is, the user can select from the drop down their availability and it **will show in their Outlook calendar**.

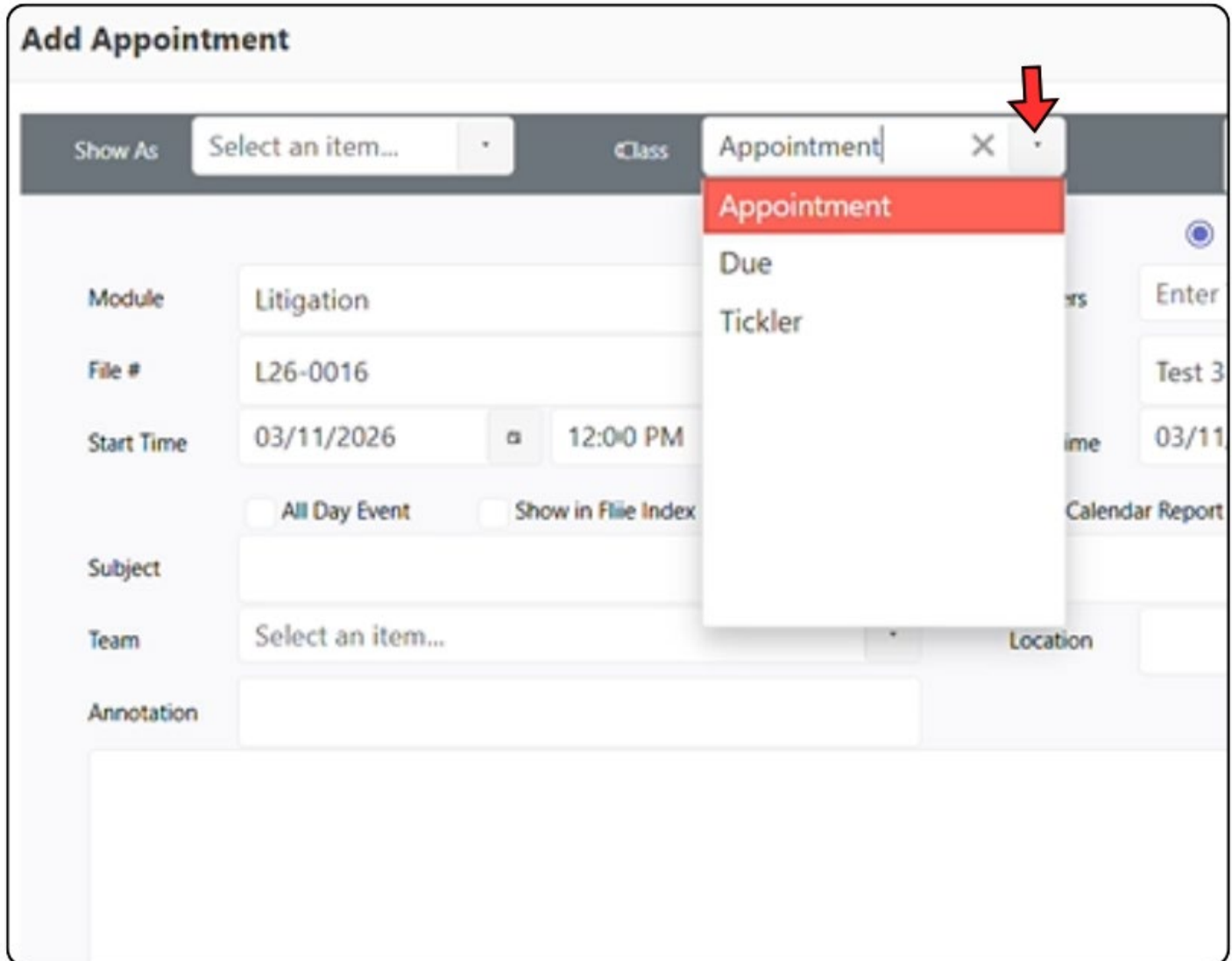
Create Calendar Events on a Matter



The screenshot shows the 'Add Appointment' form. At the top, there is a grey banner with the text 'Show As' and a dropdown menu labeled 'Select an item...'. A red arrow points to this dropdown menu. The dropdown menu is open, showing four options: 'Free', 'Tentative', 'Busy', and 'Out Of Office'. To the right of the dropdown menu, there is a 'Class' field with a button labeled 'Appointment'. Below the banner, there are several input fields: 'Module', 'File #', 'Start Time' (with a time picker set to 12:00 PM), 'Subject', 'Team' (with a dropdown menu labeled 'Select an item...'), and 'Annotation'.

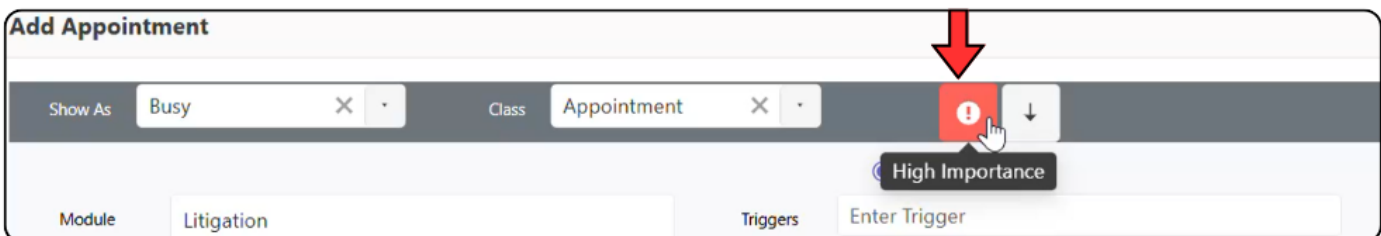
The **Class** field, in the grey banner at the top, will default to the option you selected to enter your event, whether it is an **Appointment, Due, or Tickler**. However, you can change from one to another in the **Class** field if it was mis-selected without having to close the window.

Create Calendar Events on a Matter



The screenshot shows the 'Add Appointment' form. At the top, there is a grey banner with 'Show As' set to 'Select an item...' and 'Class' set to 'Appointment'. A dropdown menu is open next to 'Appointment', showing options: 'Appointment' (highlighted in red), 'Due', and 'Tickler'. A red arrow points to the dropdown arrow in the banner. Below the banner, the form fields include: Module (Litigation), File # (L26-0016), Start Time (03/11/2026 at 12:00 PM), All Day Event (unchecked), Show in File Index (unchecked), Subject (empty), Team (Select an item...), and Annotation (empty).

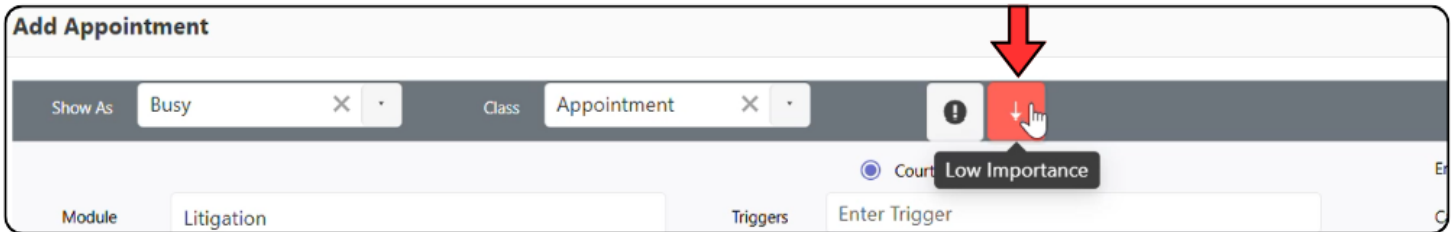
The button with the exclamation point, at the top on the grey banner, is the **High Importance** label. If the event is of high importance, then select this button and it will turn **red**.



This screenshot shows the 'Add Appointment' form with the 'Show As' dropdown set to 'Busy' and 'Class' set to 'Appointment'. The 'High Importance' button, represented by a red square with a white exclamation point, is now selected and highlighted. A red arrow points to this button. Below the banner, the form fields include: Module (Litigation), Triggers (Enter Trigger), and a 'High Importance' label below the banner.

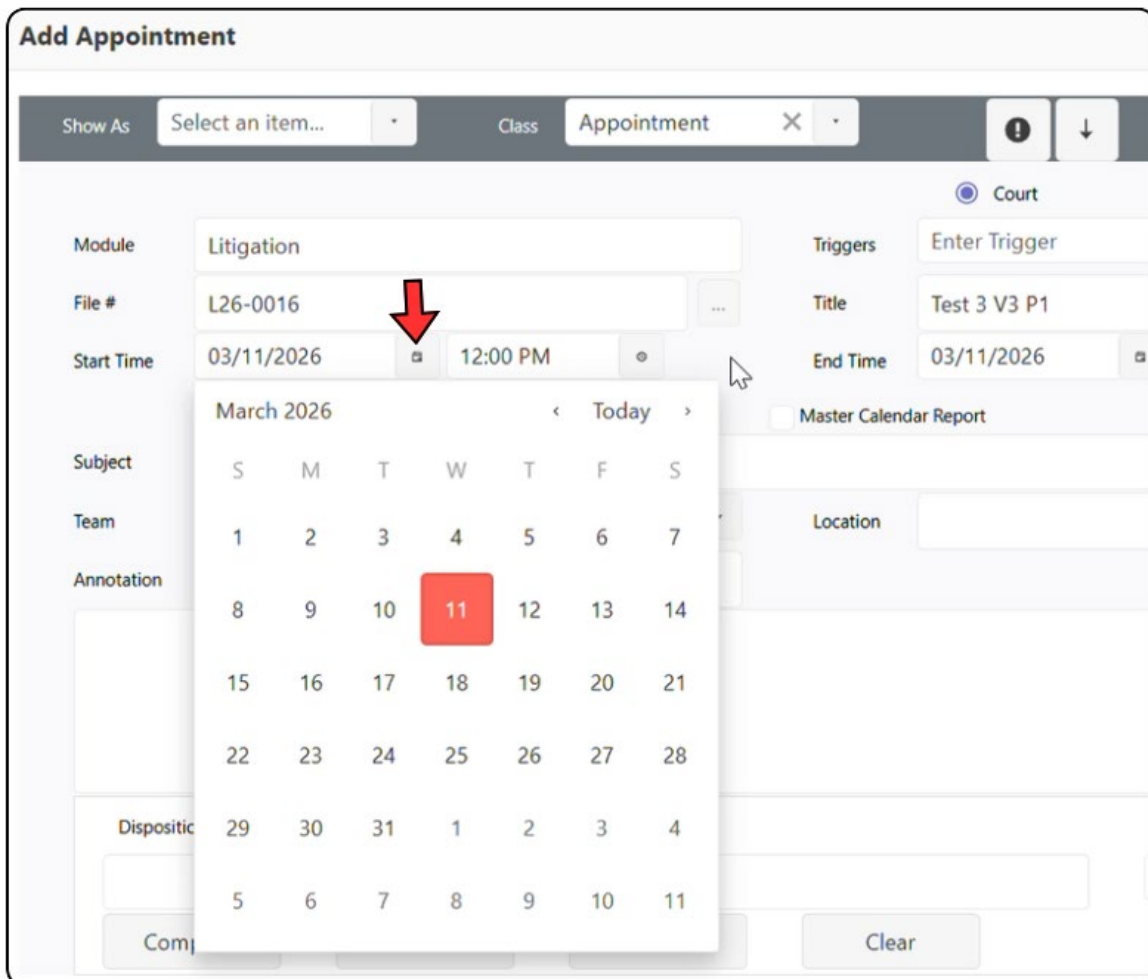
Create Calendar Events on a Matter

The button with the down arrow, at the top on the grey banner, is the **Low Importance** label. If the event is of low importance, then select this button and it will turn **red**.



The screenshot shows the 'Add Appointment' form. At the top, there is a grey banner with several controls. A red arrow points to a button with a downward arrow icon, which is highlighted in red. Below this button, a tooltip reads 'Low Importance'. Other visible controls include 'Show As' set to 'Busy', 'Class' set to 'Appointment', and a 'Module' dropdown set to 'Litigation'.

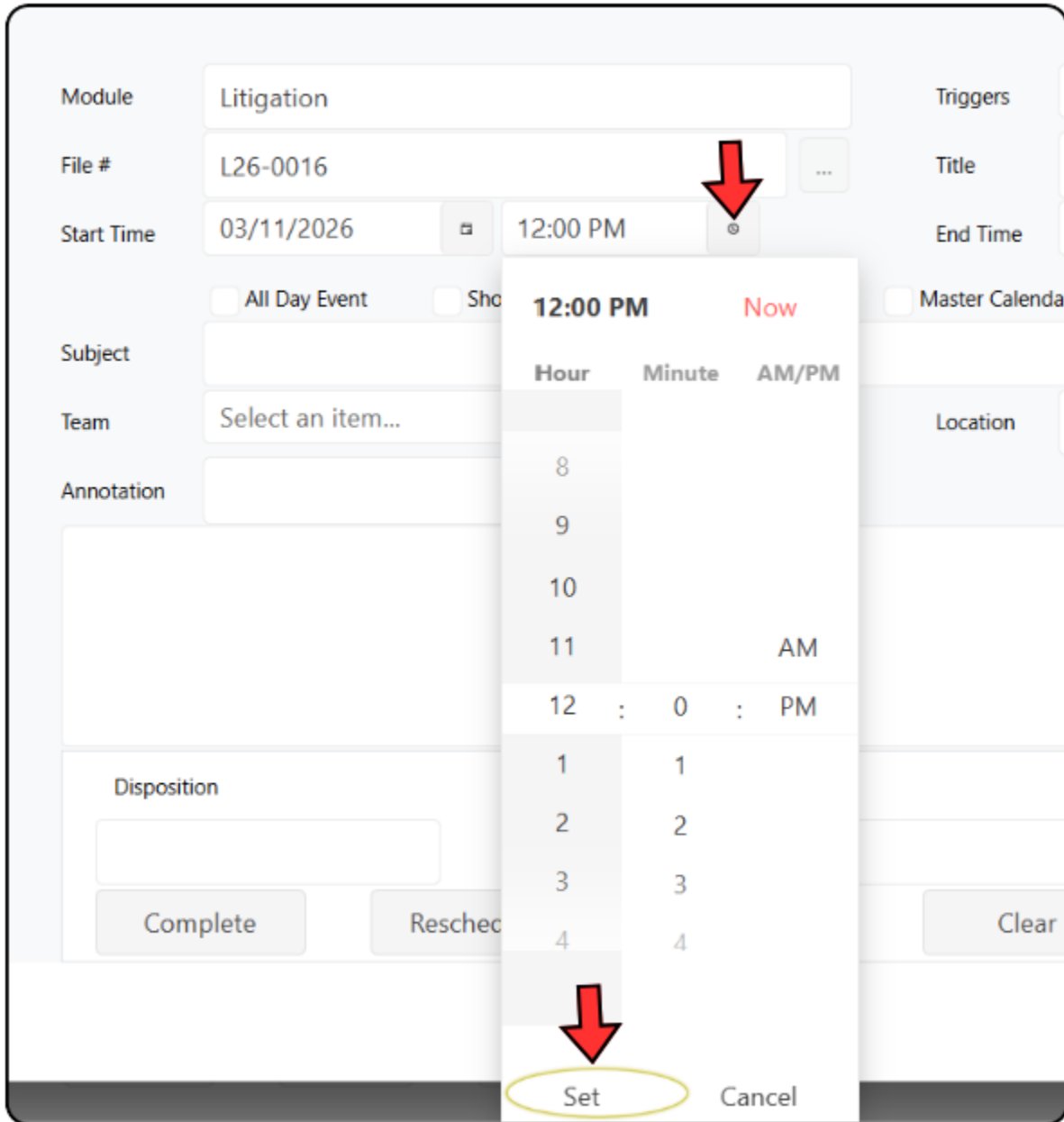
The **Start Time and End Time Calendar fields** have a drop-down calendar you can select the date from, or you can free form type the date in. Today's date will auto populate and a time is entered; both may be edited.



This screenshot shows the 'Add Appointment' form with the date picker for the 'Start Time' field open. A red arrow points to the calendar icon next to the 'Start Time' field. The calendar shows the month of March 2026, with the 11th highlighted in red. The 'Start Time' is currently set to '03/11/2026' at '12:00 PM'. Other fields visible include 'File #' (L26-0016), 'Title' (Test 3 V3 P1), and 'End Time' (03/11/2026).

Create Calendar Events on a Matter

The **time** drop down menu has **set** and **cancel** buttons at the bottom of the drop-down menu. Select your time using the scroll menu, then click **Set**. You can type your time free form if you choose, without the need to use the **Set** button.

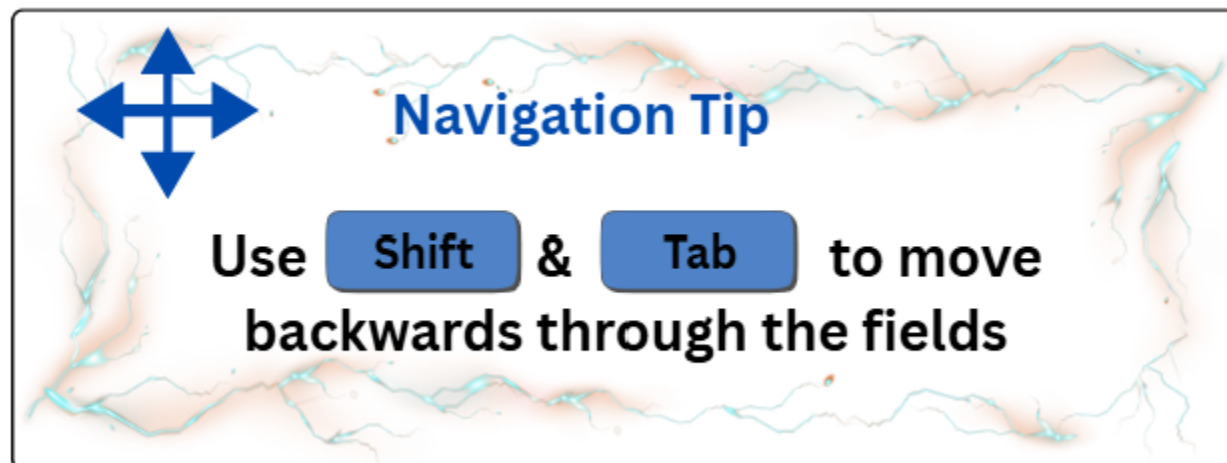
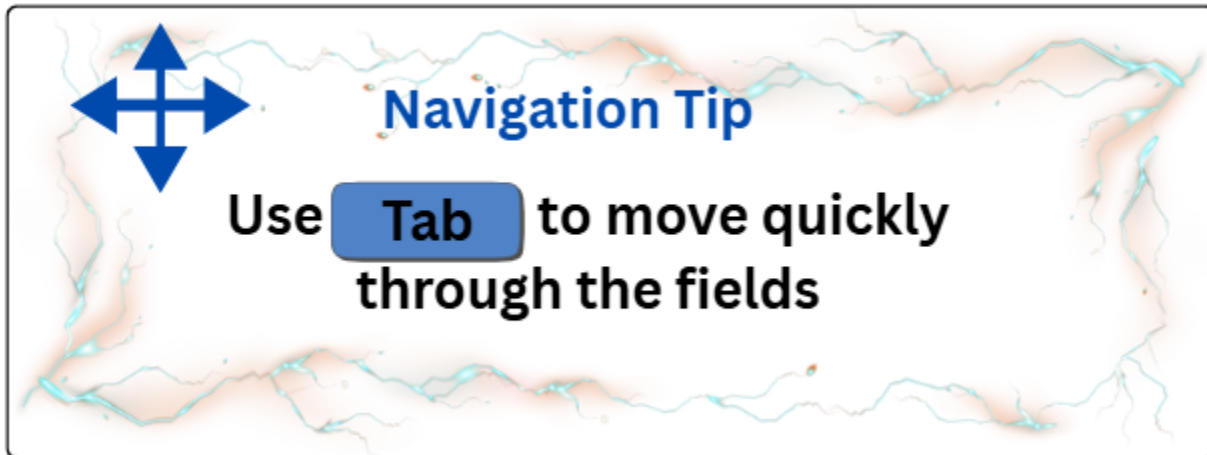


The screenshot shows the 'Create Calendar Events on a Matter' form. The 'Start Time' field is set to '03/11/2026' and '12:00 PM'. A red arrow points to the time dropdown icon. The dropdown menu is open, showing a scrollable list of times from 8 AM to 4 PM. The 'Set' button at the bottom of the menu is highlighted with a yellow circle and a red arrow.

Hour	Minute	AM/PM
8		
9		
10		
11		AM
12	0	PM
1	1	
2	2	
3	3	
4	4	

Buttons: **Set** (highlighted), **Cancel**

You can **tab in and out** of any of these fields.

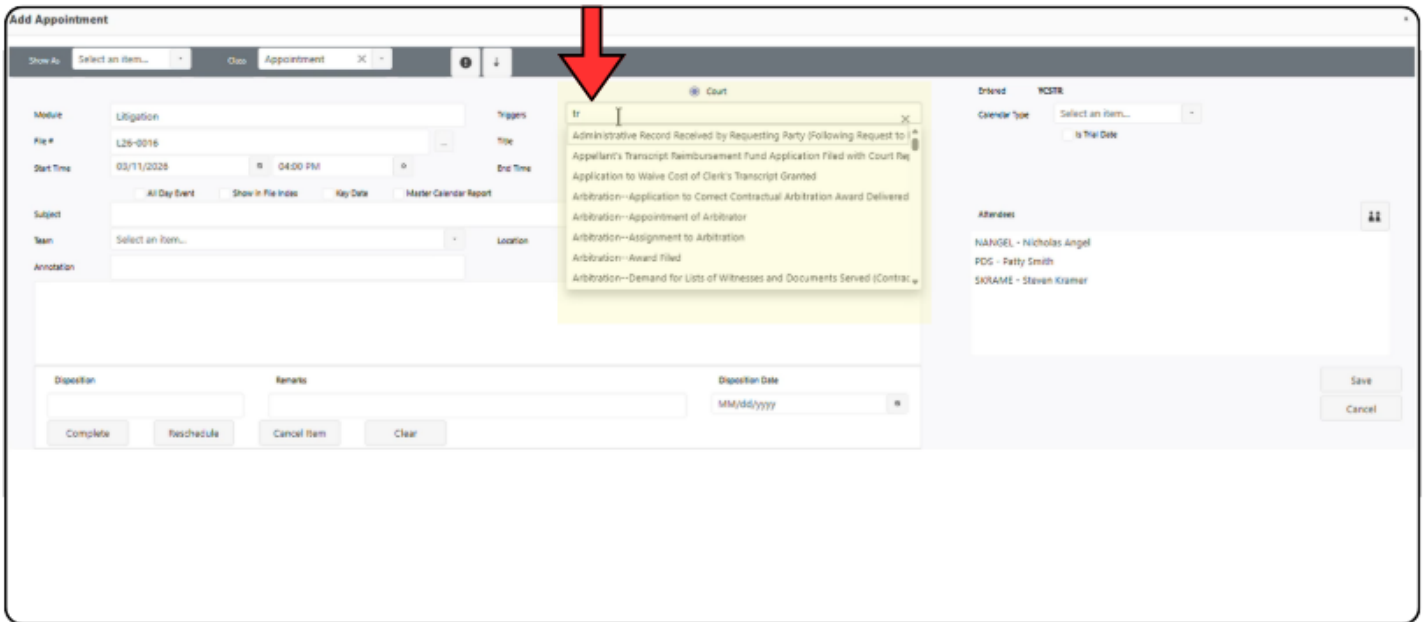


For more details on Triggers see the article: [Manage Events with Triggers](#).

If a **Court, Judge, and/or Magistrate** are entered in the matter, then they will show **above the Triggers** field with their radio button checked, otherwise they will not be visible.

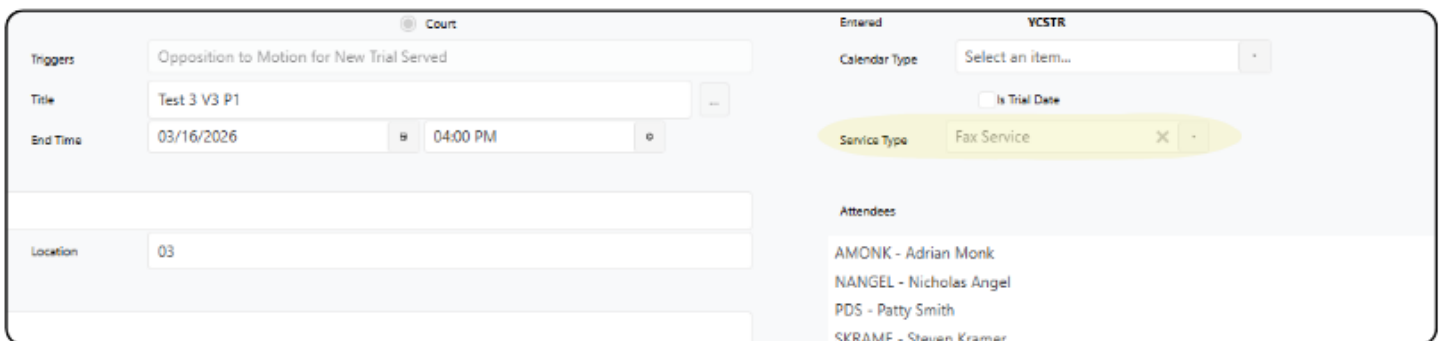
To enter a Trigger, begin writing in the field and a drop-down list will appear. Once you make your selection, the drop-down list will disappear and your selection is saved. Your selection will also appear in the **Subject** field. However, the **Subject field remains editable** should you wish to rename the event.

Create Calendar Events on a Matter



The screenshot shows the 'Add Appointment' form. A red arrow points to the 'Triggers' dropdown menu, which is open and displaying a list of legal events. The form includes fields for 'Matter' (Litigation), 'File #' (L25-0016), 'Start Time' (03/11/2025), 'End Time' (04:00 PM), 'Subject', 'Team', 'Location', 'Disposition', 'Remarks', 'Disposition Date', and 'Attendees'.

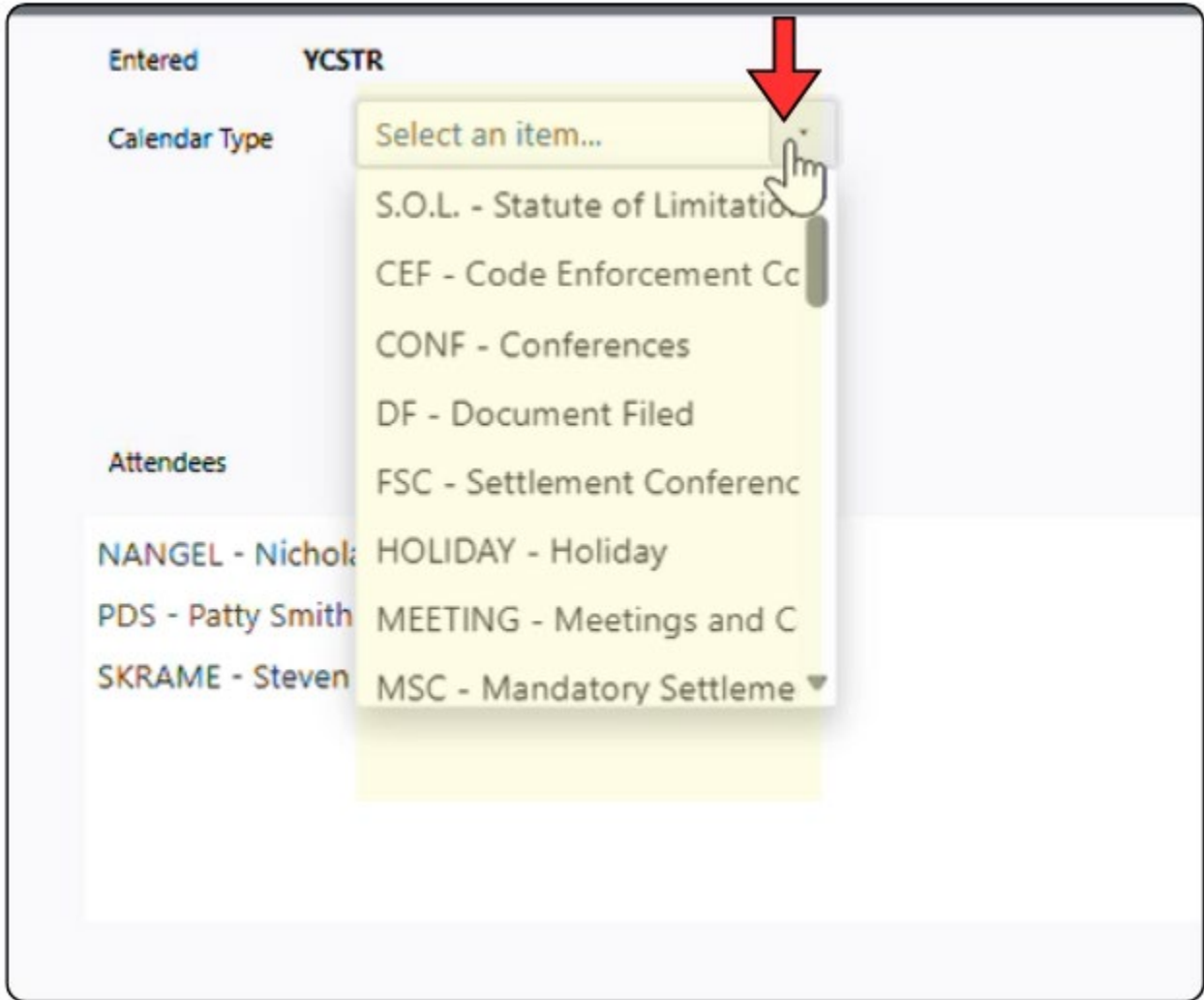
If your selection involves a motion served, then a **Service Type** field will show to the right. You may select the appropriate method from the drop down.



This screenshot shows the 'Add Appointment' form with the 'Triggers' dropdown set to 'Opposition to Motion for New Trial Served'. The 'Service Type' field is now visible and set to 'Fax Service'. The 'Calendar Type' is set to 'Select an item...'. The 'Attendees' list includes AMONK - Adrian Monk, NANGEL - Nicholas Angel, PDS - Patty Smith, and SKRAME - Steven Kramer.

Calendar Type, select from the drop down by clicking on the applicable type.

Create Calendar Events on a Matter



Entered YCSTR

Calendar Type

Select an item...

- S.O.L. - Statute of Limitation
- CEF - Code Enforcement Cc
- CONF - Conferences
- DF - Document Filed
- FSC - Settlement Conferenc
- HOLIDAY - Holiday
- MEETING - Meetings and C
- MSC - Mandatory Settleme

Attendees

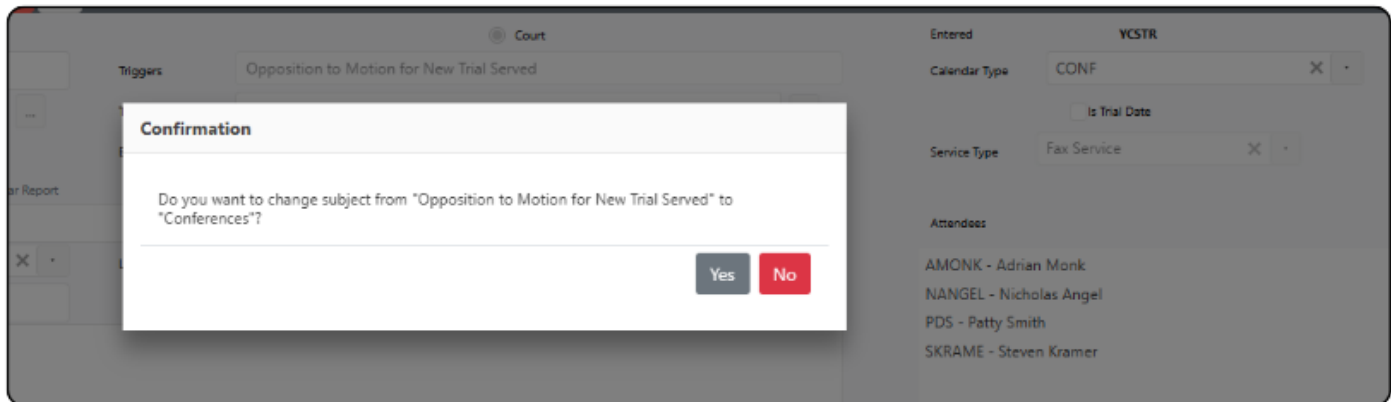
NANGEL - Nicholas

PDS - Patty Smith

SKRAME - Steven

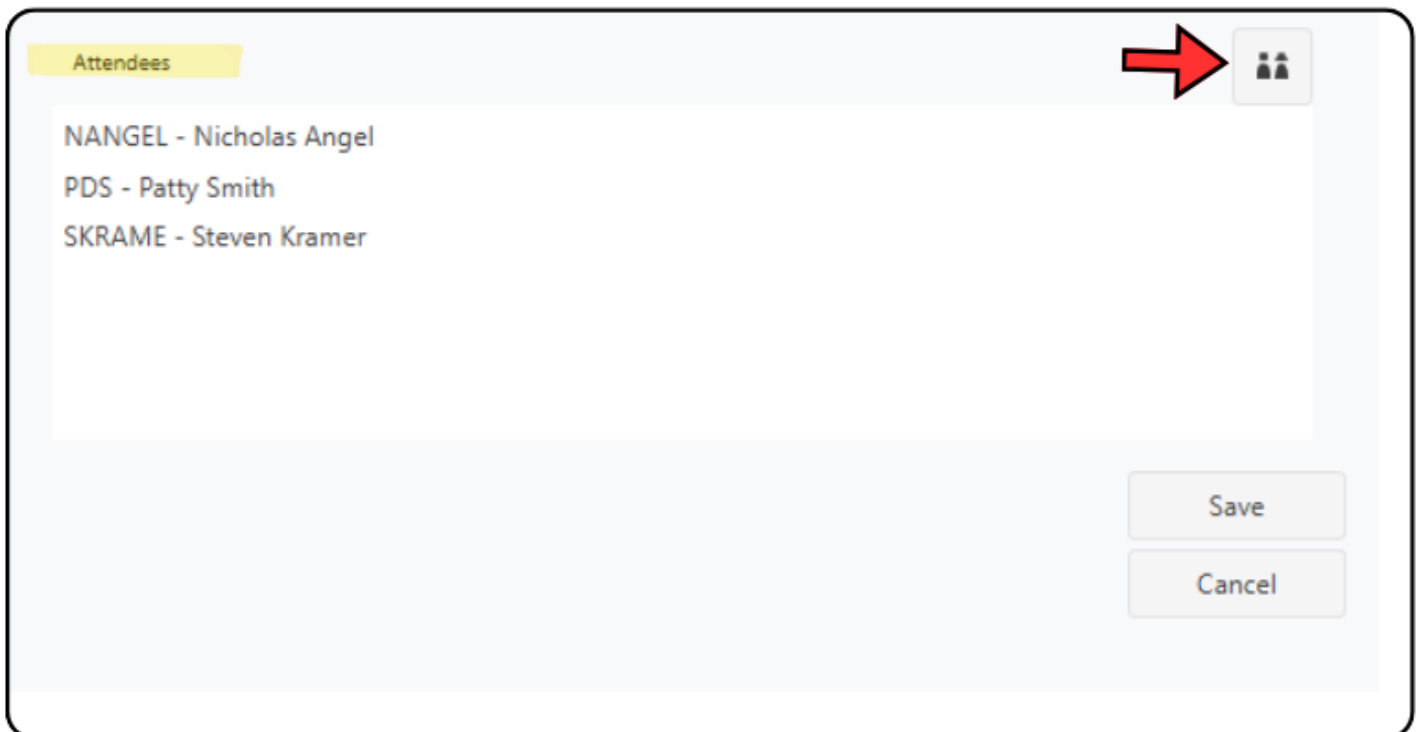
Depending on your selection, you may be prompted to change the Subject field to match the **Calendar Type**.

Create Calendar Events on a Matter



The screenshot shows the CYCOM interface with a Confirmation dialog box in the foreground. The dialog box asks: "Do you want to change subject from 'Opposition to Motion for New Trial Served' to 'Conferences'?" with "Yes" and "No" buttons. In the background, the "Attendees" field is visible, listing: AMONK - Adrian Monk, NANGEL - Nicholas Angel, PDS - Patty Smith, and SKRAME - Steven Kramer. The "Calendar Type" is set to "CONF" and "Service Type" is "Fax Service".

To add or remove attendees from the list shown, click the people icon  to the top right corner of the **Attendees** field.

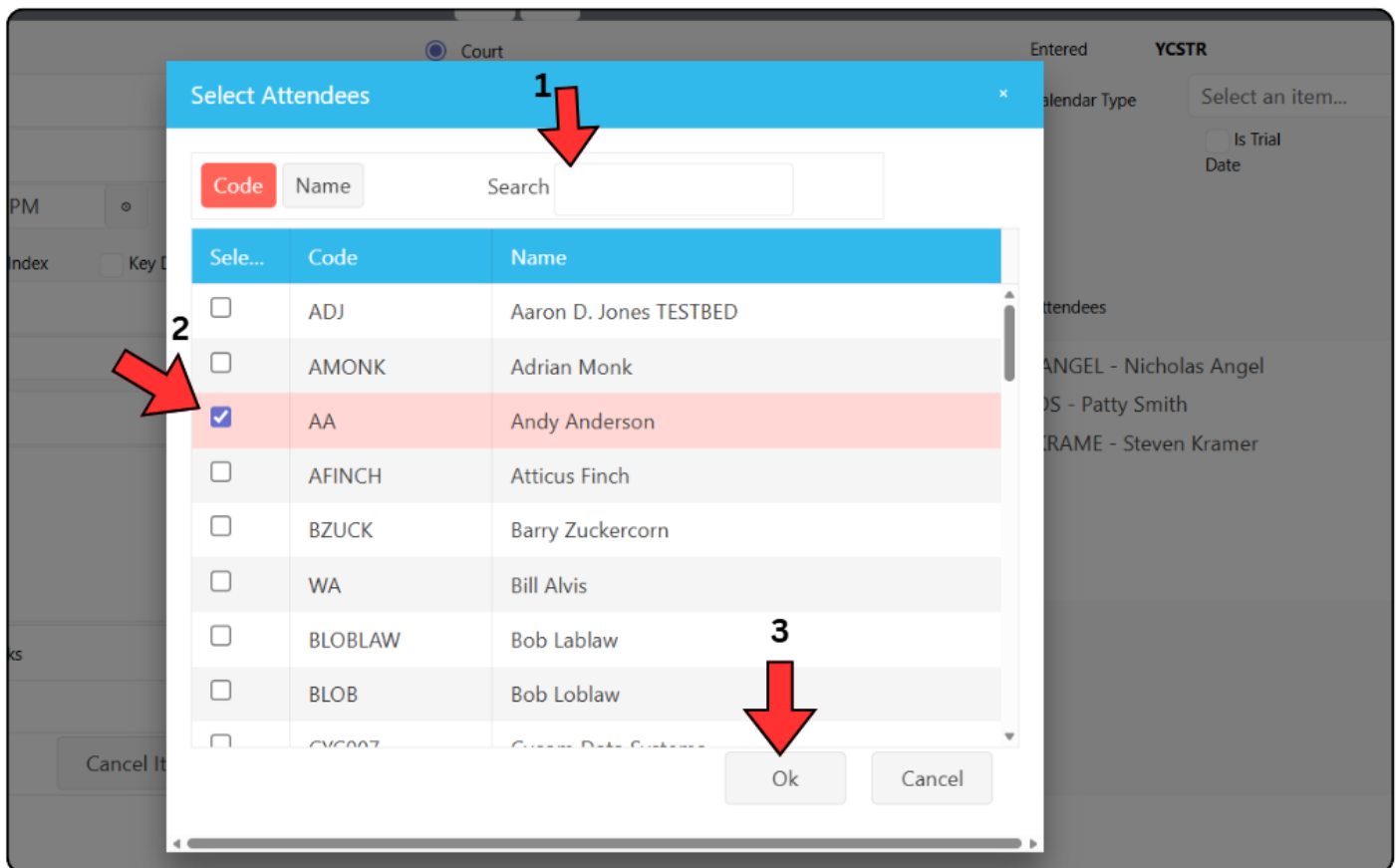


This close-up view of the "Attendees" field shows a list of attendees: NANGEL - Nicholas Angel, PDS - Patty Smith, and SKRAME - Steven Kramer. A red arrow points to the people icon in the top right corner of the field, which is used to add or remove attendees. Below the list are "Save" and "Cancel" buttons.

Create Calendar Events on a Matter

A card **Select Attendees** will pop up. You may **Search** for a name simply by typing a partial or full name, first or last, of an individual and any names that include the letters you entered will be automatically populated.

You may also **check** any individuals you wish to include **or uncheck** any individuals you wish to exclude from the list. Click **OK** to save your selection.



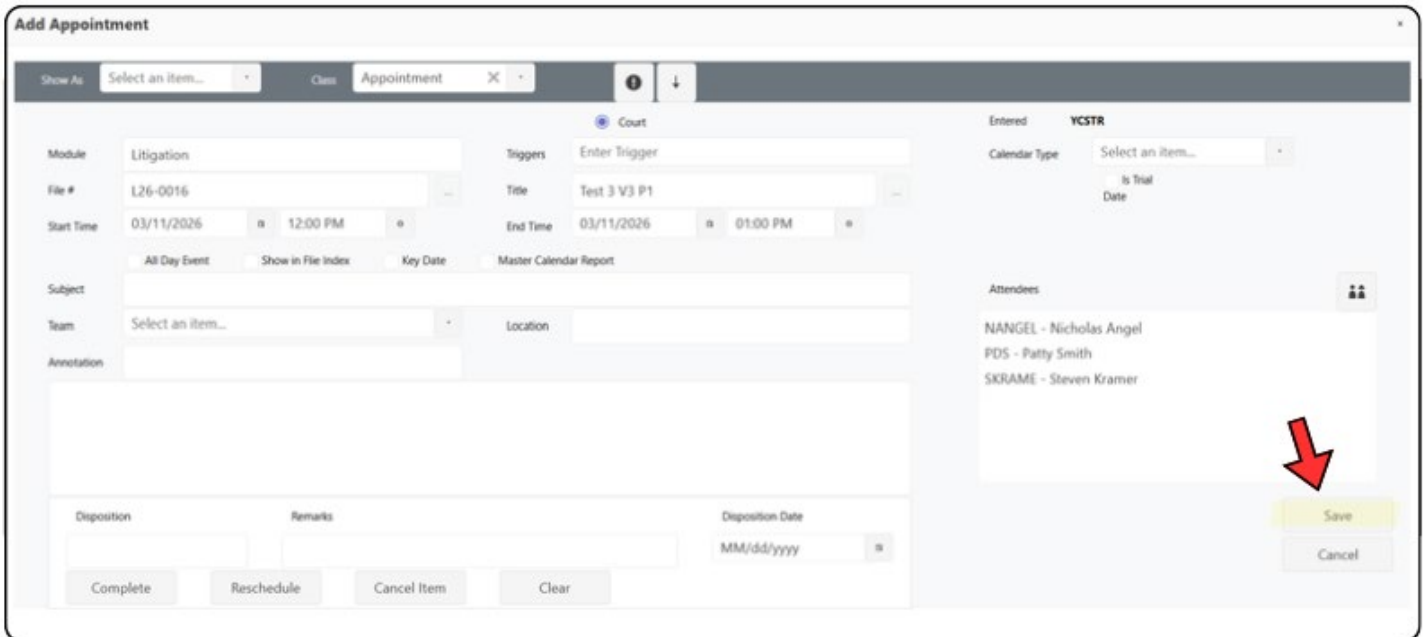
The **Team** field has drop-down options, pre-entered by your system administrator, for you to select your team from.

The **Location** field can be used for room numbers in a court, a building or an address. The **Annotation** is a short description of the event.

The **Description** block below the Annotation is **an unlimited text field** that will contain the rule from Calendar Rules that relates to the event (if you have a subscription). Otherwise, you may use this space for free form typing, entering links or a longer description of the event.

Create Calendar Events on a Matter

Once you have completed entering the data needed for the event click **Save** at the right side of the screen to save the event. Click **Cancel** if you wish to not save the event.



Add Appointment

Show As: Select an item... Class: Appointment

Module: Litigation Triggers: Enter Trigger

File #: L26-0016 Title: Test 3 V3 P1

Start Time: 03/11/2026 12:00 PM End Time: 03/11/2026 01:00 PM

Calendar Type: Select an item... Is Trial Date

Subject: [Empty] Location: [Empty]

Team: Select an item... Annotation: [Empty]

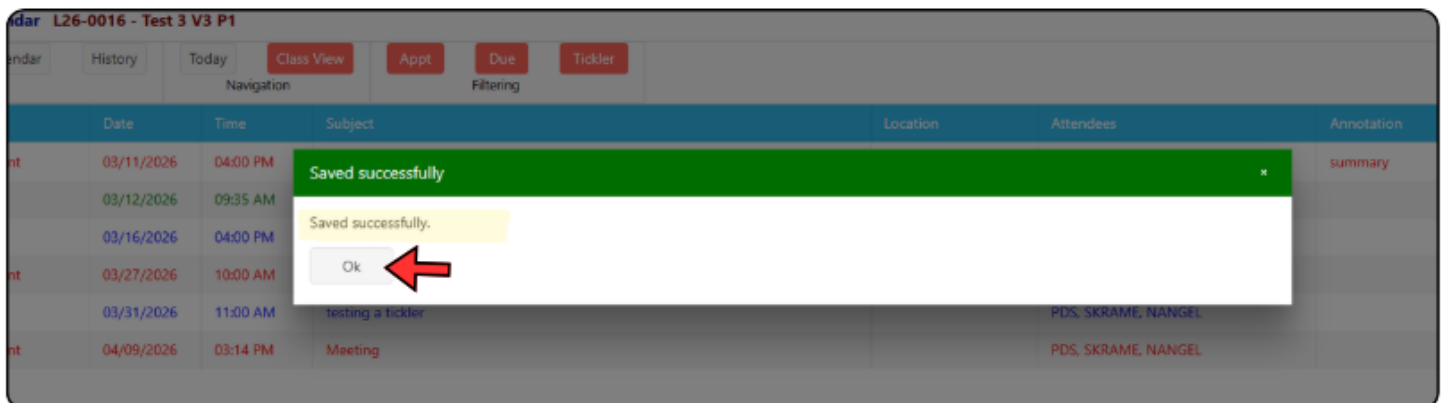
Disposition: [Empty] Remarks: [Empty] Disposition Date: MM/dd/yyyy

Complete Reschedule Cancel Item Clear

Attendees: NANGEL - Nicholas Angel, PDS - Patty Smith, SKRAME - Steven Kramer

Save **Cancel**

A **Saved successfully** note will appear, click **OK**. The event will be listed in **Class View**.



L26-0016 - Test 3 V3 P1

Calendar History Today **Class View** Appt Due Tickler

Navigation Filtering

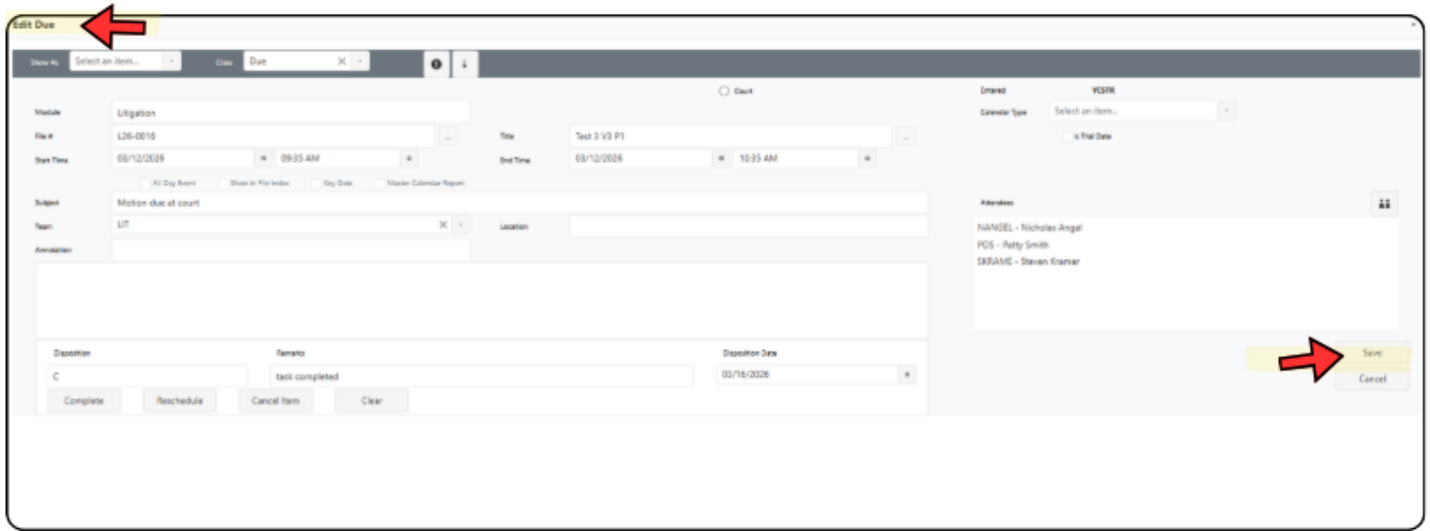
Date	Time	Subject	Location	Attendees	Annotation
03/11/2026	04:00 PM	Saved successfully			summary
03/12/2026	09:35 AM	Saved successfully.			
03/16/2026	04:00 PM				
03/27/2026	10:00 AM				
03/31/2026	11:00 AM	testing a tickler		PDS, SKRAME, NANGEL	
04/09/2026	03:14 PM	Meeting		PDS, SKRAME, NANGEL	

Ok

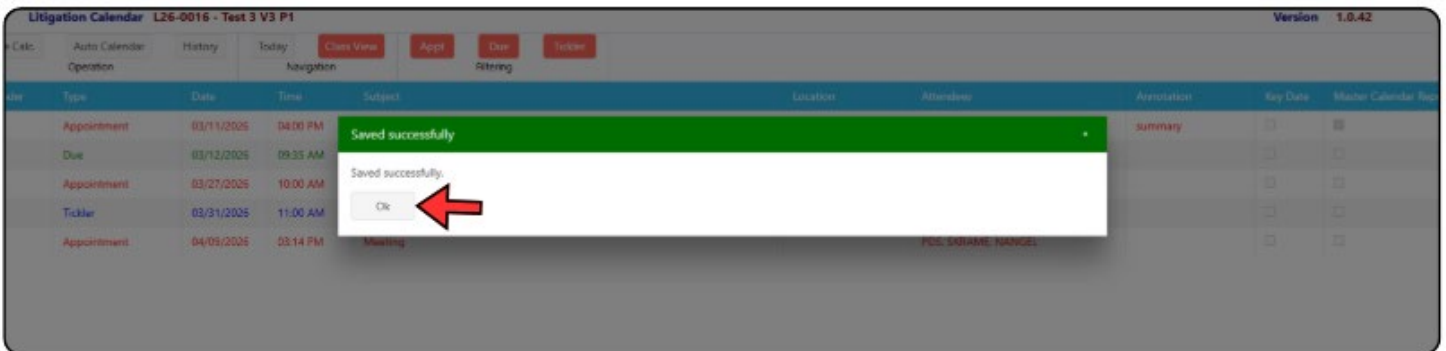
Create Calendar Events on a Matter

Editing Events

To edit an event, simply **double click** on it in the **Class View**. An Edit Appt, Edit Due, or Edit Tickler card will open, make any changes needed to any of the fields then click **Save**.



A **Saved successfully** note will appear, click **OK** and it will return you to the main Module Calendar **Class View** list.



Type	Date	Time	Subject	Location	Attendees	Annotations	Key Date	Master Calendar Rep
Appointment	03/11/2025	04:00 PM				summary		
Due	03/12/2025	09:35 AM						
Appointment	03/27/2025	10:00 AM						
Tickler	03/31/2025	11:00 AM						
Appointment	04/09/2025	03:14 PM			POL, SARAH, NANCY			

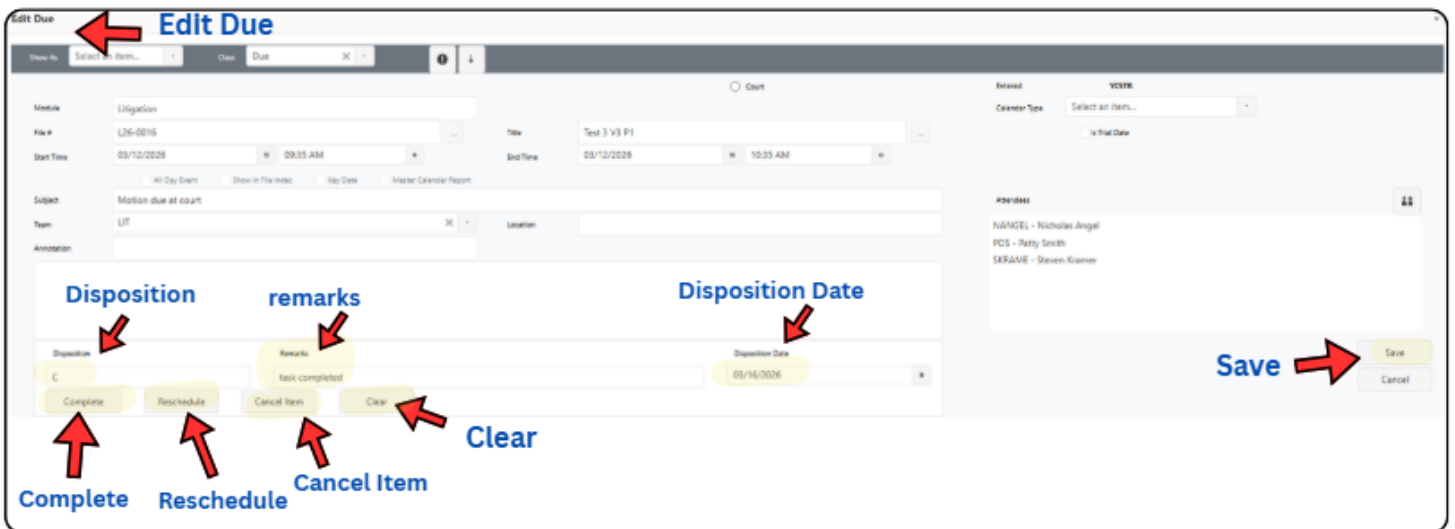
Disposition Events

- To Complete an Event
- To Reschedule an Event
- To Cancel an Event
- To Clear the Disposition Fields

To Disposition an event, double click on it in the Module Calendar list. An Edit event window will open, in the **Disposition** section, click **Complete**, **Reschedule**, **Cancel Item** or **Clear**.

To Complete an Event

To complete the event, select **Complete** a **C** will appear in the disposition field, enter brief **remarks** about the event. The **Disposition Date** will auto populate for the current date. Click **Save** and the event will disappear from your active events in Class View. You can always access the completed event by selecting the **History** toggle button.



The screenshot shows the 'Edit Due' window with the following elements and annotations:

- Disposition**: A dropdown menu showing 'C' (Complete). An arrow points to this field with the label 'Disposition'.
- remarks**: A text input field containing 'task completed'. An arrow points to this field with the label 'remarks'.
- Disposition Date**: A date field showing '03/16/2026'. An arrow points to this field with the label 'Disposition Date'.
- Action Buttons**: Four buttons are visible: 'Complete', 'Reschedule', 'Cancel Item', and 'Clear'. Arrows point to each of these buttons with labels 'Complete', 'Reschedule', 'Cancel Item', and 'Clear' respectively.
- Save Button**: A yellow 'Save' button is located at the bottom right. An arrow points to it with the label 'Save'.

Create Calendar Events on a Matter

To Reschedule an Event

If you edit an existing event and dispose as **“reschedule”**, an **R** will be entered in the Disposition field,

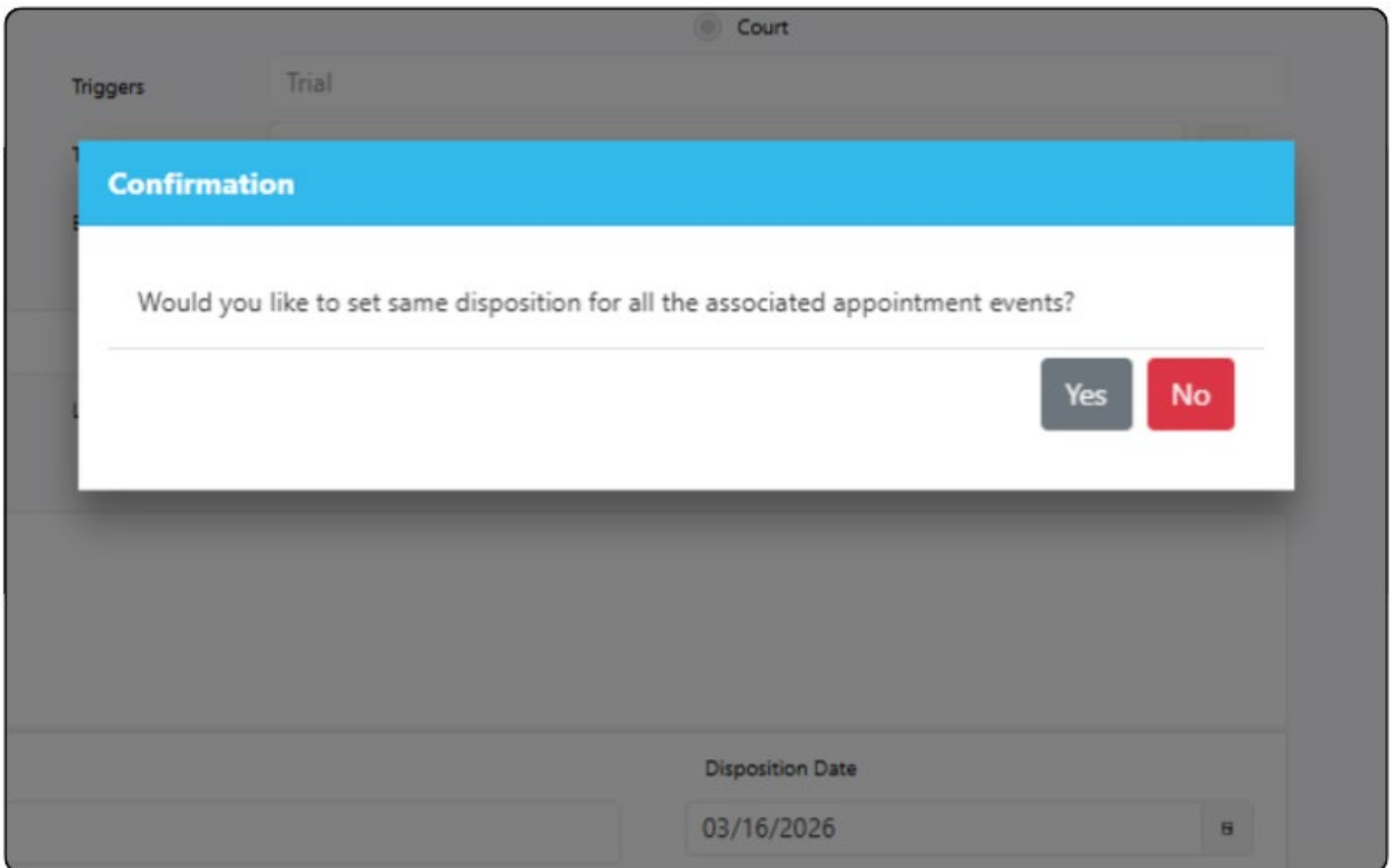


The screenshot shows a form with the following fields and buttons:

- Disposition:** A dropdown menu with 'R' selected.
- Remarks:** An empty text input field.
- Disposition Date:** A date picker showing '03/16/2026'.
- Buttons:** 'Complete', 'Reschedule' (highlighted with a red arrow), 'Cancel Item', and 'Clear'.

Below the 'Reschedule' button, the word **Reschedule** is written in blue text.

and you will be prompted to recreate the event using all previously selected criteria, except for the date and time. You will need to enter the new time and date for the event.



The screenshot shows a confirmation dialog box with the following content:

- Title:** Confirmation
- Message:** Would you like to set same disposition for all the associated appointment events?
- Buttons:** 'Yes' (grey) and 'No' (red).

The background shows a blurred view of the event form with the 'Disposition Date' field set to '03/16/2026'.

Create Calendar Events on a Matter

Your newly rescheduled event will have the same **Calendar Type, attendees, Subject, team, location, annotation, and description**, if previously completed. Click **Save** once you have updated the event.

To Cancel an Event

To Cancel an event select **Cancel Item**, an **X** will automatically be entered in the **Disposition** field. Click **Save** and the event will be removed from **Class View** list but can be accessed if needed by selecting **History** toggle button.



The screenshot shows the 'Disposition' section of an event form. It includes a 'Disposition' field with a dropdown menu currently showing 'X'. Below this field are four buttons: 'Complete', 'Reschedule', 'Cancel Item', and 'Clear'. The 'Cancel Item' button is highlighted with a yellow background and a red arrow points to it from below. Another red arrow points to the 'X' in the 'Disposition' field. To the right of these buttons is a 'Remarks' text area and a 'Disposition Date' field showing '03/19/2026'.

To Clear Disposition Fields

To clear entries from all the fields in the **Disposition** section of the event, click the **Clear** button.



The screenshot shows the 'Disposition' section of an event form after clearing. The 'Disposition' field is now empty. Below it are the same four buttons: 'Complete', 'Reschedule', 'Cancel Item', and 'Clear'. The 'Clear' button is highlighted with a yellow background and a red arrow points to it from below. To the right are the 'Remarks' text area and the 'Disposition Date' field, which now shows the placeholder 'MM/dd/yyyy'.

If you **clear** all the disposition fields in an event **in the History** list, then it **will be moved** back to the active events list in the **Class View**.