

Contents:**Page 1: Quick Reference Guide****Page 2: Standard Guide****Page 6: New Assignment Entry Field Description Guide****Quick Reference Guide****There are 5 steps to complete this task:**

1. Open the **Assignments** module.
2. Press **New**.
3. In the **New File** window, press **Auto**.
4. In the **New Assignment Entry** window, fill out all mandatory fields.
5. Press **Save**.

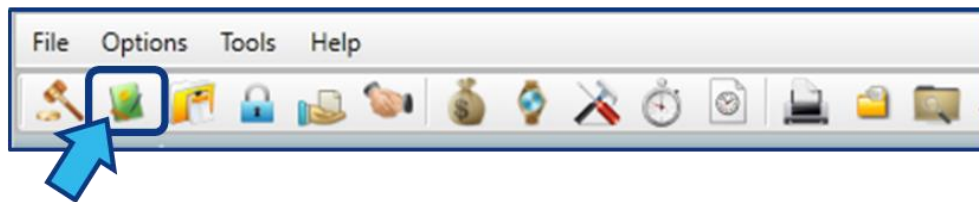
Standard Guide

Step 1. Open the Assignments module.

There are 2 ways to open this module.

1-Step Option:

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



+ **Helpful Hint**

When you hover over the correct icon, **Assignments** will appear.

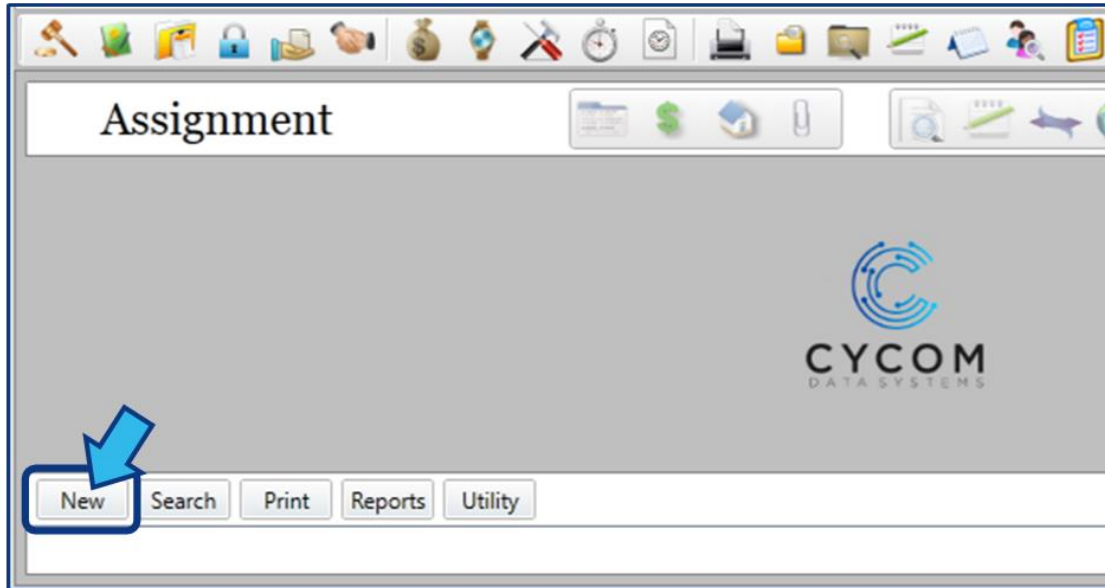
2-Step Option:

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



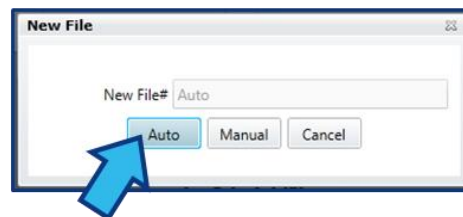
Step 2. Press New.

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



Step 3. Press Auto in the New File window.

A **New File** window appears after you complete Step 2. Press the **Auto** button to automatically generate a **File Number** for the new matter in accordance with the naming convention of your office.



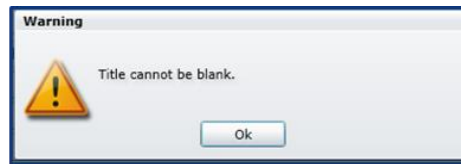
Step 4. Fill out the mandatory fields in the New Assignment Entry window.

A **New Assignment Entry** window appears after you complete Step 3. Fill out the mandatory fields for the matter.

★ Best Practices

When creating a new matter, fill out all relevant fields as completely as possible.

Mandatory fields are marked with an asterisk (*). The new assignment cannot be saved until values for these fields are provided. A **Warning** window will appear if you try to save a new assignment 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.

Navigation Tip

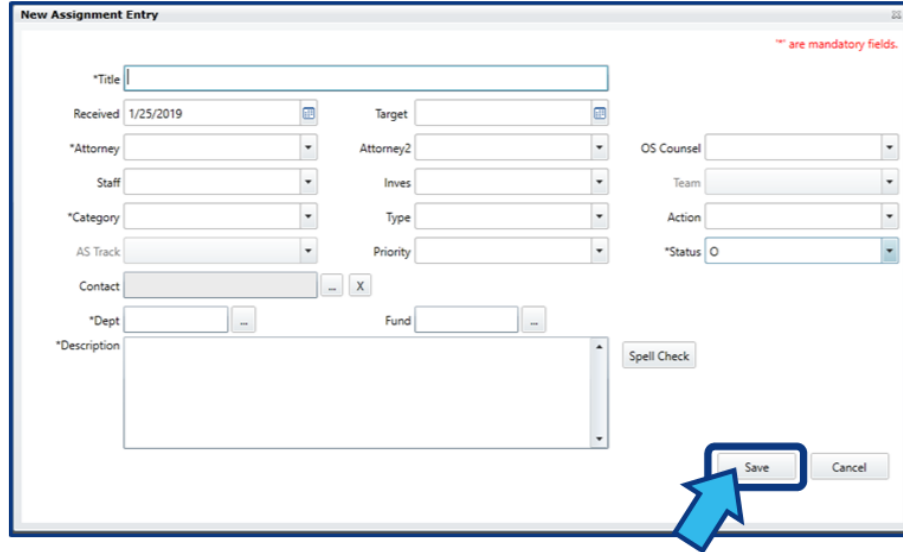
Use **Tab** to move quickly through the fields.

Navigation Tip

Use  and  to quickly select from fields with drop-down menus.

Step 5. Press Save.

The **Save** button is located in the bottom-right corner of the **New Assignment Entry** window.



New Assignment Entry

** are mandatory fields.

*Title

Received 1/25/2019 Target

*Attorney Attorney2 OS Counsel

Staff Inves Team

*Category Type Action

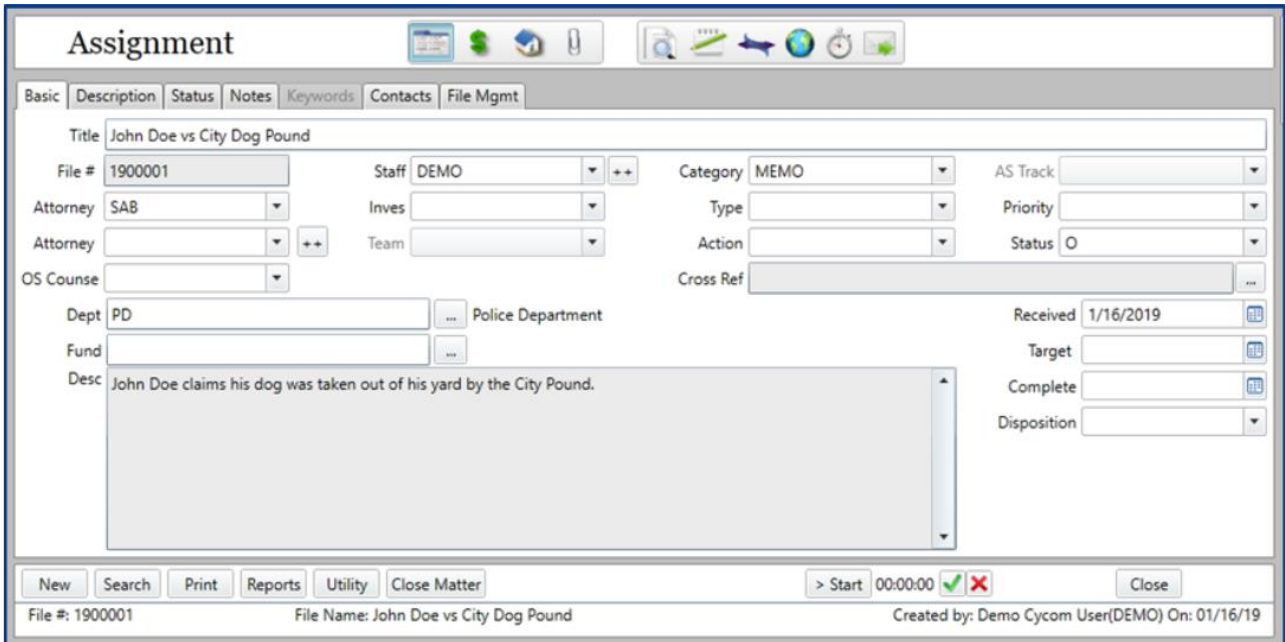
AS Track Priority *Status O

Contact

*Dept Fund

*Description

After saving, the **Basic Tab** of your new **Assignment** matter will appear.



Assignment

Basic | Description | Status | Notes | Keywords | Contacts | File Mgmt

Title John Doe vs City Dog Pound

File # 1900001 Staff DEMO ++ Category MEMO AS Track

Attorney SAB Inves Type Priority

Attorney ++ Team Action Status O

OS Course Cross Ref

Dept PD Police Department Received 1/16/2019

Fund Target

Desc John Doe claims his dog was taken out of his yard by the City Pound. Complete

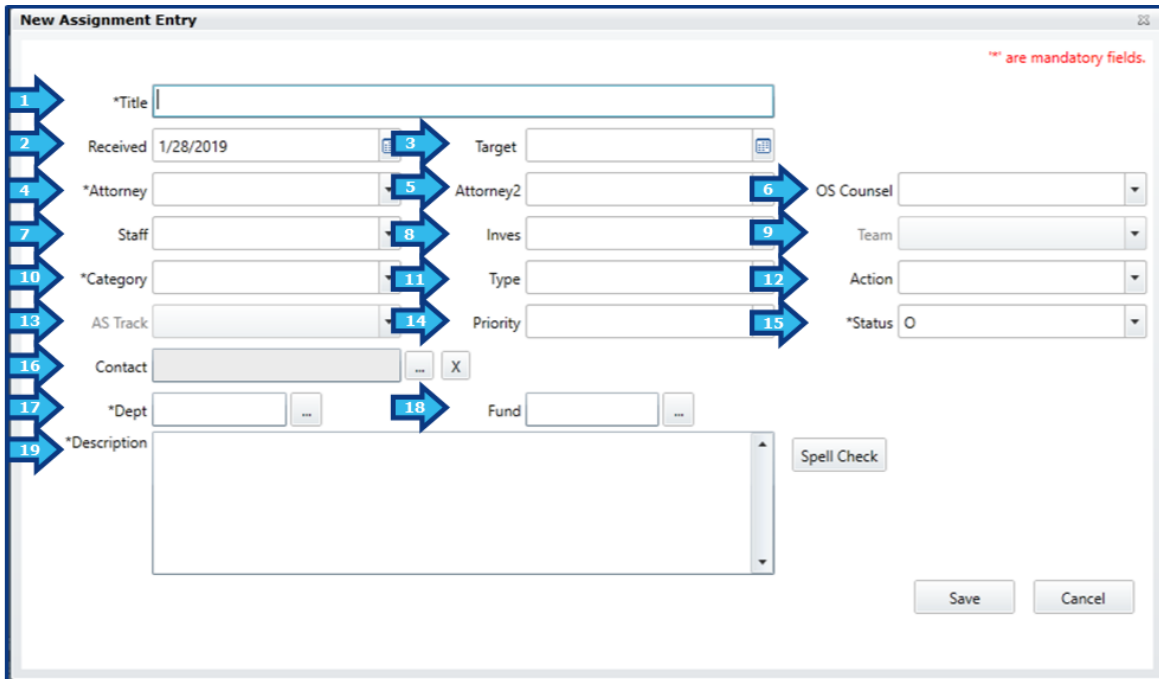
Disposition

New Search Print Reports Utility Close Matter > Start 00:00:00 Close

File #: 1900001 File Name: John Doe vs City Dog Pound Created by: Demo Cycom User(DEMO) On: 01/16/19

New Assignment Entry

Field Description Guide



The screenshot shows a 'New Assignment Entry' window with the following fields and callouts:

- 1: *Title
- 2: Received (Date)
- 3: Target
- 4: *Attorney
- 5: Attorney2
- 6: OS Counsel
- 7: Staff
- 8: Inves
- 9: Team
- 10: *Category
- 11: Type
- 12: Action
- 13: AS Track
- 14: Priority
- 15: *Status
- 16: Contact
- 17: *Dept
- 18: Fund
- 19: *Description

Additional elements include a 'Spell Check' button and 'Save'/'Cancel' buttons at the bottom right. A red note in the top right corner states: **"" are mandatory fields.**

The configuration of the **CityLaw/CountyLaw** 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 Assignment Entry** window, please contact your **System Administrator**.

1. Title

The name of the new Assignment matter.

This is a mandatory field.

2. Received (Date)

The date the assignment was received. The value will default to the current date.

This is a mandatory field.

3. Target (Date)

The estimated date the assignment will be completed. Entering a Target Date will automatically place it on the calendar.

4. Attorney

The attorney to whom the assignment was given. If you are an attorney, this field will auto-populate with your username.

5. Attorney 2

An additional attorney, if applicable.

6. Outside Counsel (OS Counsel)

Outside Counsel used on the assignment.

7. Staff

The staff to whom the assignment was given, or the staff responsible for managing the entry of this assignment.

8. Investigator (Inves)

The investigator used on the assignment.

9. Team

The Team responsible for the assignment.

10. Category

Category codes separate assignments into classifications relevant to your office. Some examples of Categories are Contracts, Ordinances, Opinions, and Resolutions.

This is a mandatory field.

11. Type

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

12. Action

Action codes describe the service to be performed by the Attorneys or Staff member on the assignment matter (e.g. Review, Prepare, Attend, Advice).

13. AS Track

...

14. Priority

The priority assigned to this matter.

15. Status

The current state of the matter (e.g. Open, Closed, Pending).

This is a mandatory field.

16. Contact

It is best practice to assign a contact to every Assignment matter. This might be a Department contact or a non-City/County employee.

17. Department (Dept)

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

This is a mandatory field.

18. Fund

...

19. Description

This is a description of the nature of the assignment for the purpose of understanding its scope and aiding in future searches for this or similar assignments.