

These notes are provided by **Cycom Data Systems, Inc.** to support the use of **CityLaw / CountyLaw Web (CLW)** 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](mailto:support@cycominc.com) or by calling **888-292-6688**.

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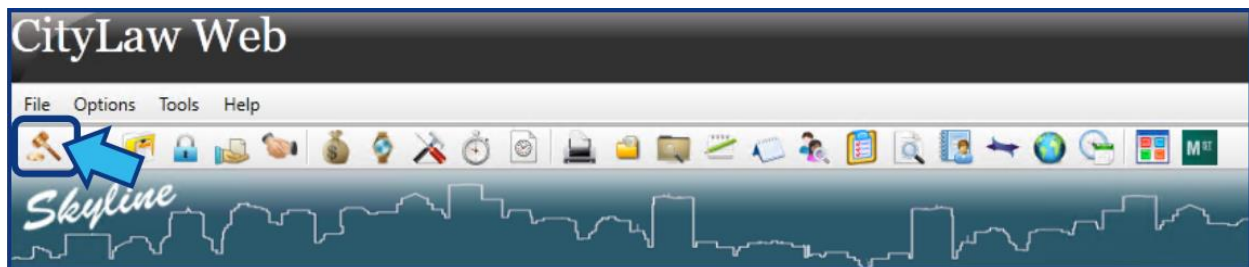
- **Litigation Basic Actions**
  - Open the Module
  - Create a New Matter
  - Find a Matter
  - Close a Matter
- **Litigation Report Options**
  - Print Customized Reports
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## Litigation Basic Actions

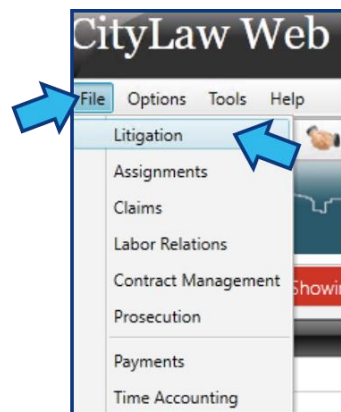
- [Open the Litigation Module](#)
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### Open the Litigation Module

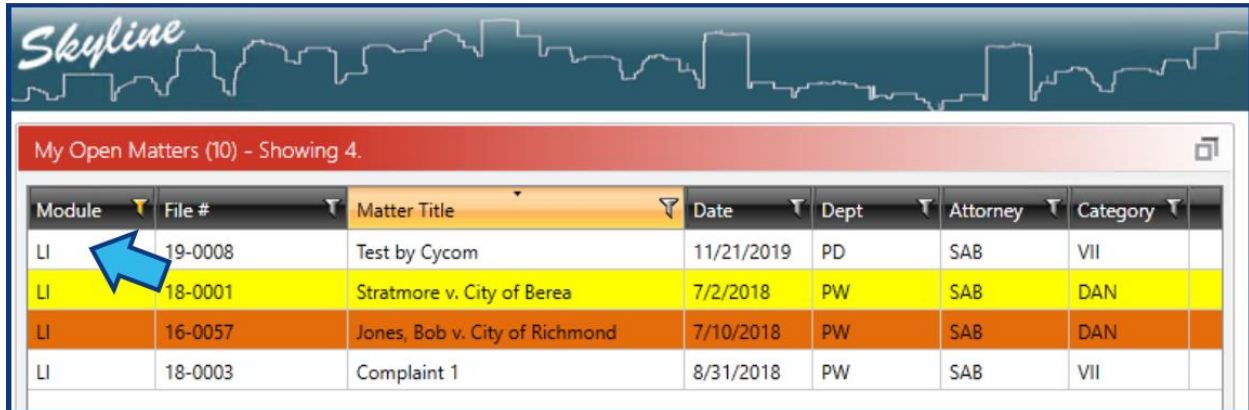
The **Litigation** module can be opened by selecting the **Litigation** icon from the **Global Toolbar**.



It can also be opened by selecting **File** from the **Menu Bar** and then selecting **Litigation** from the list of options.

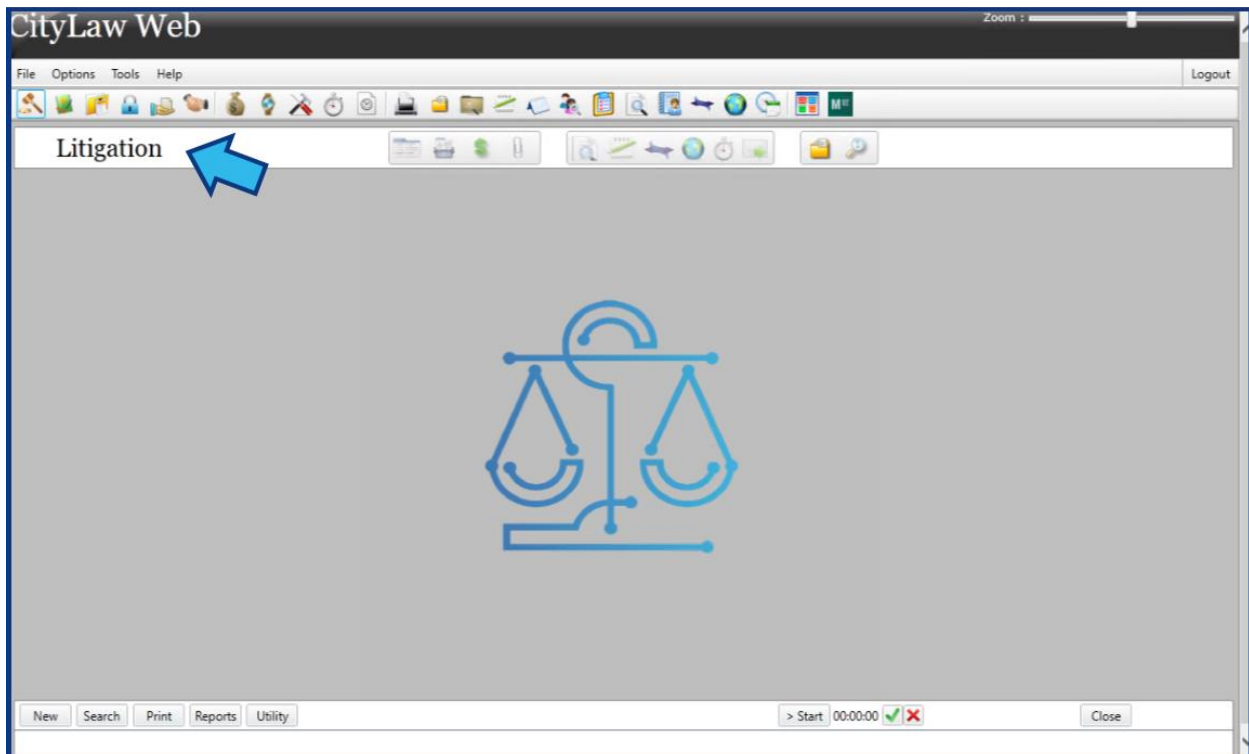


Finally, it can be opened by opening a **Litigation** matter. For example, if a **Litigation** matter is in the **My Open Matters** display in the **Skyline** view, then double-clicking on that matter will open the **Litigation** module.



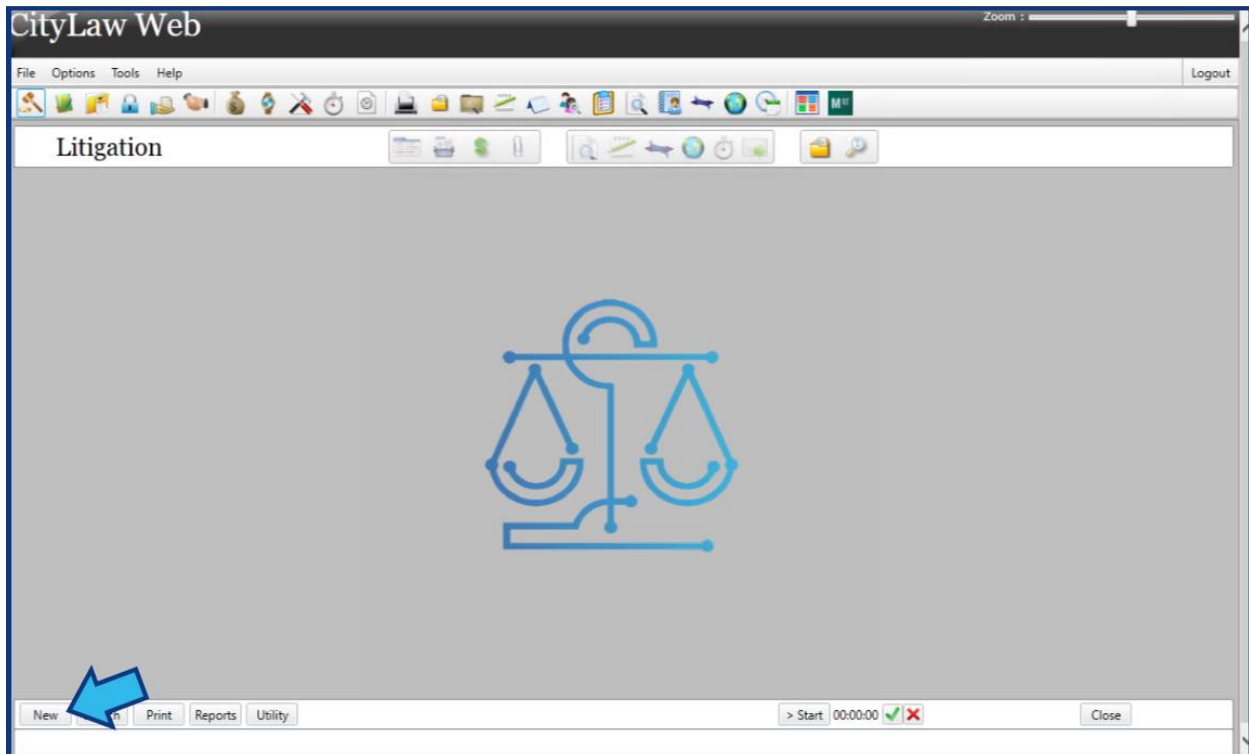
Module	File #	Matter Title	Date	Dept	Attorney	Category
LI	19-0008	Test by Cycom	11/21/2019	PD	SAB	VII
LI	18-0001	Stratmore v. City of Berea	7/2/2018	PW	SAB	DAN
LI	16-0057	Jones, Bob v. City of Richmond	7/10/2018	PW	SAB	DAN
LI	18-0003	Complaint 1	8/31/2018	PW	SAB	VII

You will know you are in the **Litigation** module when you see the **Litigation** header.

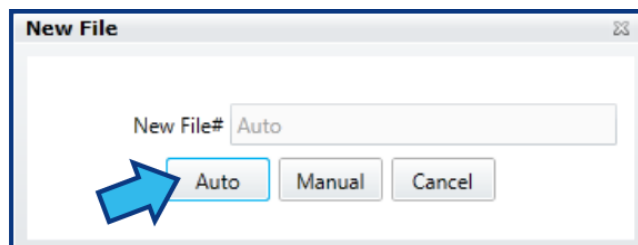


## Create a New Litigation Matter

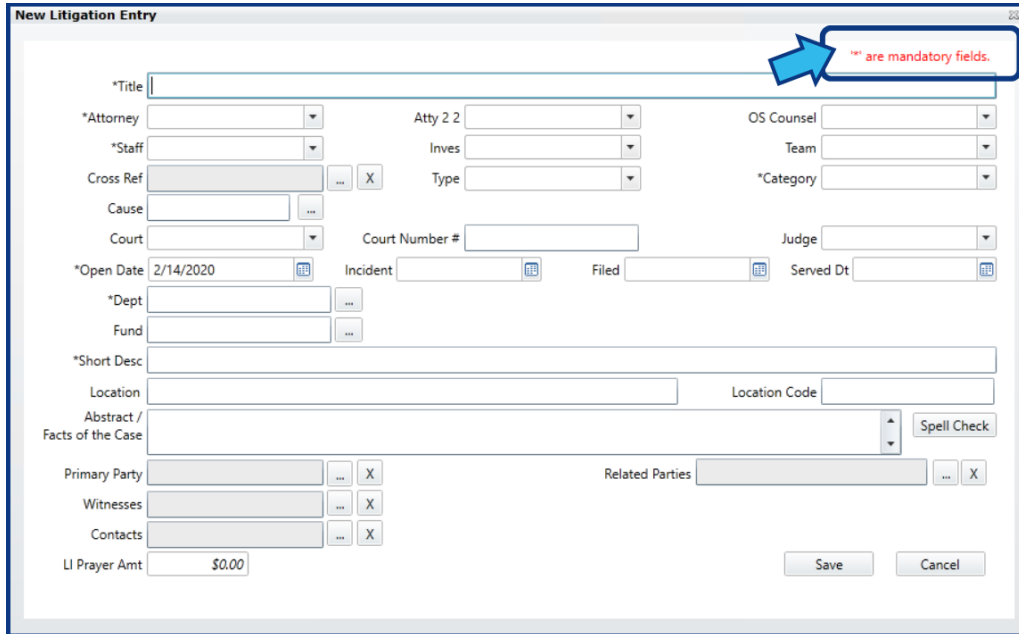
To create a new **Litigation** matter, open the **Litigation** module and select the **New** button on the action bar at the bottom.



You will be prompted to create a new **File Number**. Select the **Auto** button to have this number automatically assigned with the next available number.



Enter the matter information into the **New Litigation Entry** window. Note that mandatory fields are marked with an asterisk.



**New Litigation Entry**

\*\*\* are mandatory fields.

\*Title

\*Attorney Atty 2 2 OS Counsel

\*Staff Inves Team

Cross Ref Type \*Category

Cause

Court Court Number # Judge

\*Open Date 2/14/2020 Incident Filed Served Dt

\*Dept

Fund

\*Short Desc

Location Location Code

Abstract / Facts of the Case Spell Check

Primary Party Related Parties

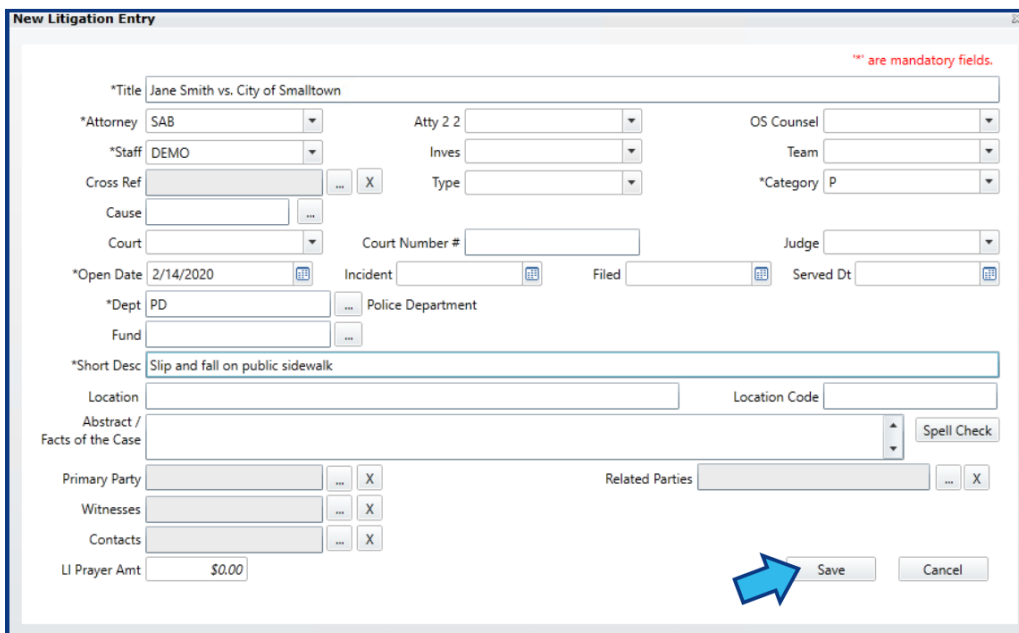
Witnesses

Contacts

LI Prayer Amt \$0.00

Save Cancel

Once you've entered the data into the fields, select the **Save** button in the lower right corner.



**New Litigation Entry**

\*\*\* are mandatory fields.

\*Title Jane Smith vs. City of Smalltown

\*Attorney SAB Atty 2 2 OS Counsel

\*Staff DEMO Inves Team

Cross Ref Type \*Category P

Cause

Court Court Number # Judge

\*Open Date 2/14/2020 Incident Filed Served Dt

\*Dept PD Police Department

Fund

\*Short Desc Slip and fall on public sidewalk

Location Location Code

Abstract / Facts of the Case Spell Check

Primary Party Related Parties

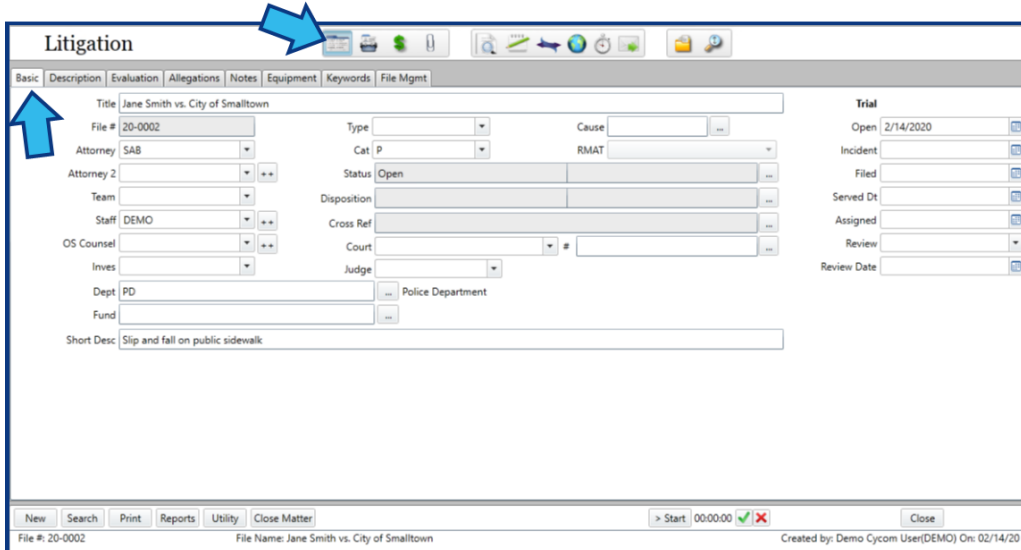
Witnesses

Contacts

LI Prayer Amt \$0.00

Save Cancel

Your new matter will open. By default, it will display the **Basic** tab of the **Basic Matter Data** view.



**Litigation**

Basic | Description | Evaluation | Allegations | Notes | Equipment | Keywords | File Mgmt

Title: Jane Smith vs. City of Smalltown

File #: 20-0002

Attorney: SAB

Attorney 2: [Dropdown]

Team: [Dropdown]

Staff: DEMO

OS Counsel: [Dropdown]

Inves: [Dropdown]

Dept: PD

Fund: [Dropdown]

Short Desc: Slip and fall on public sidewalk

Type: [Dropdown]

Cause: [Dropdown]

Cat: P

Status: Open

Disposition: [Dropdown]

Cross Ref: [Dropdown]

Court: [Dropdown]

Judge: [Dropdown]

Police Department

**Trial**

Open: 2/14/2020

Incident: [Dropdown]

Filed: [Dropdown]

Served Dt: [Dropdown]

Assigned: [Dropdown]

Review: [Dropdown]

Review Date: [Dropdown]

New Search Print Reports Utility Close Matter

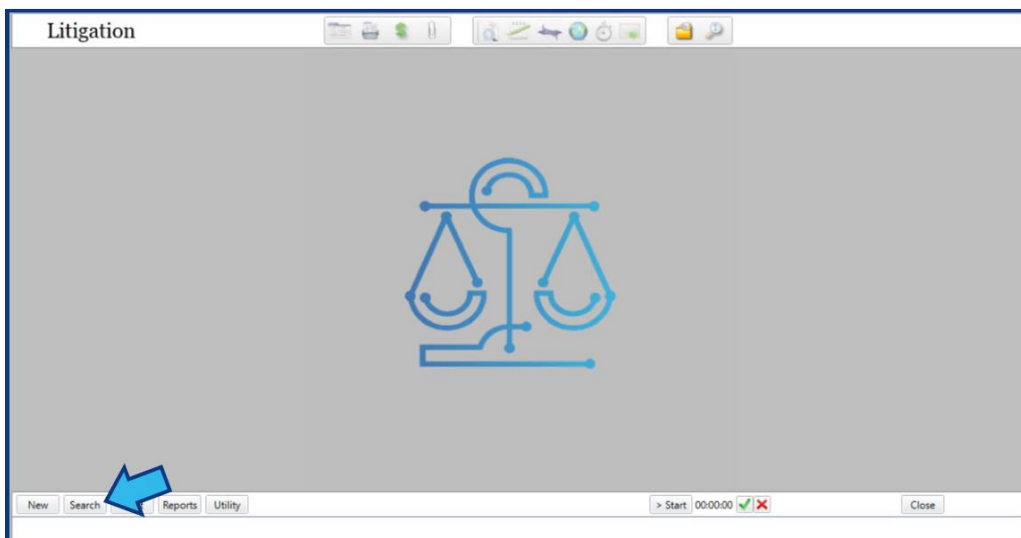
> Start 00:00:00 [Checkmark] [X]

Close

File #: 20-0002 File Name: Jane Smith vs. City of Smalltown Created by: Demo Cycom User(DEMO) On: 02/14/20

## Find a Litigation Matter

To find a **Litigation** matter, first open the **Litigation** module. Then select the **Search** button from the action bar on the bottom.



**Litigation**


New Search [Checkmark] Reports Utility

> Start 00:00:00 [Checkmark] [X]

Close

A **Search Criteria** window will appear allowing you to enter or select options to filter your search. Enter any information you know to locate the matter. Select **Search** to return the results.

**Litigation Search Criteria**
✖



**Enter any criteria to filter and select desired Litigation files.**

**Search selection**

File #

Inves  ++

Status  ++

Cat  ++

Type  ++

Attorney  ++

1st  2nd

Team  ++

Staff  ++

Court  ++

Court No

Cause  ++

RMAT

Dept  ++

Fund  ++

Dispo  ++

OS Cnsl  ++

**Search words**

+  +

or

+  +

**Found in :**

Title  Status Desc  Keyword  Payee

Abstract Desc  Dispo Notes  Short Desc  Caption

Location  Location Code  Evaluation  Matter notes

Search Type

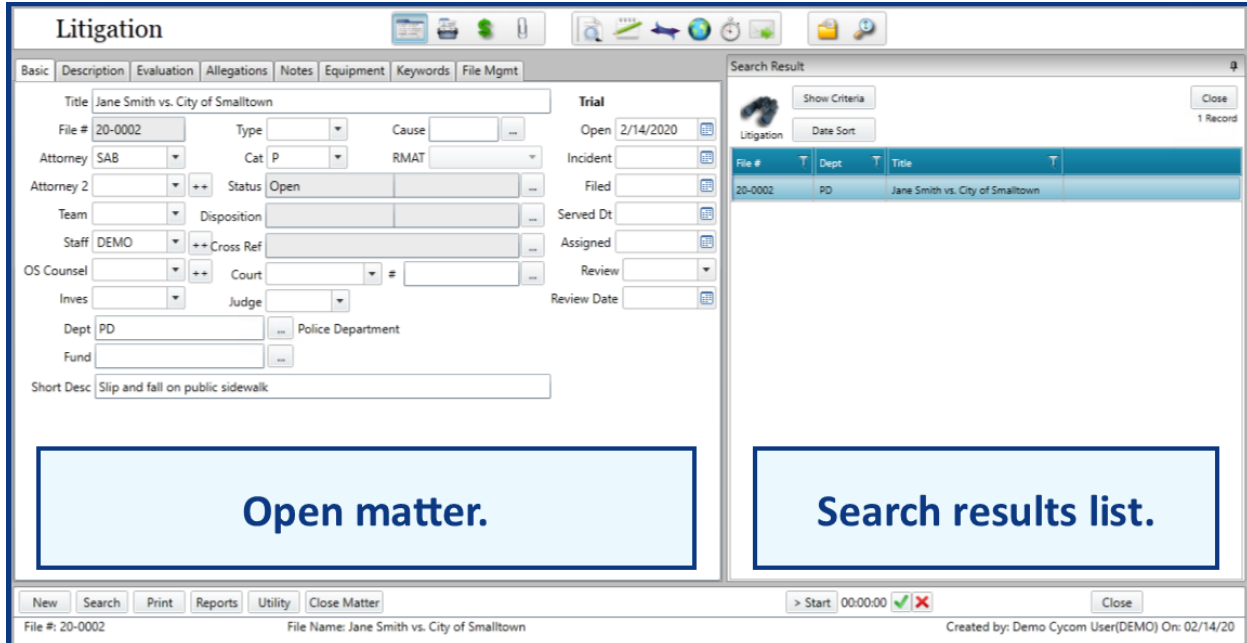
Contains  Begins with

**Dates**

	Empty	From	To
Trial Dt	<input type="text"/>	<input type="text"/>	<input type="text"/>
Open Dt	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
Incident	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
Filed	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
Served	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
Assigned	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
Review Date	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
Disposition	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
Status	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
Notes	<input type="text"/>	<input type="text"/>	<input type="text"/>
Judge	<input type="text"/>	<input type="text"/>	<input type="text"/>

Include history

Assuming your selected **Search Criteria** finds at least one match, a **Search Result** window will appear on the right side of the **Litigation** module and a matter from this list will be displayed on the left side. Selecting a matter from this list will open that matter on the left side.



The screenshot shows the Litigation module interface. The left pane displays a matter form for 'Jane Smith vs. City of Smalltown' with fields for Title, File # (20-0002), Type, Cause, Attorney (SAB), Cat (P), Status (Open), and Dept (PD). The right pane shows a 'Search Result' window with a table containing one record: File # 20-0002, Dept PD, Title Jane Smith vs. City of Smalltown. Two blue boxes are overlaid on the interface: one on the left matter form labeled 'Open matter.' and one on the right search results table labeled 'Search results list.'

## Close a Litigation Matter

When we speak of closing a matter, this refers to two different tasks. The first refers to closing a matter because you are finished with your edits, research, or additions. The second refers to changing the matter status to closed, such as when a matter is disposed.

To close a **Litigation** matter to continue with other work, you can simply open another **Litigation** matter. Or you can also close the **Litigation** module using the **Close** button in the bottom right corner.

### Litigation

Basic
Description
Evaluation
Allegations
Notes
Equipment
Keywords
File Mgmt

Title: Jane Smith vs. City of Smalltown

File #: 20-0002    Type: [v]    Cause: [v] ...

Attorney: SAB    Cat: P    RMAT: [v]

Attorney 2: [v] ++    Status: Open [v] ...

Team: [v]    Disposition: [v] ...

Staff: DEMO [v] ++    Cross Ref: [v] ...

OS Counsel: [v] ++    Court: [v] # [v] ...

Inves: [v]    Judge: [v]

Dept: PD [v] Police Department

Fund: [v]

Short Desc: Slip and fall on public sidewalk

#### Trial

Open: 2/14/2020 [v]

Incident: [v]

Filed: [v]

Served Dt: [v]

Assigned: [v]

Review: [v]

Review Date: [v]

New   Search   Print   Reports   Utility   Close Matter
> Start 00:00:00 [v] [x]
Close

File #: 20-0002
File Name: Jane Smith vs. City of Smalltown
Created by: Demo Cycom User(DEMO) On: 02/14/20

To dispose a **Litigation** matter, select the ellipsis button, "...", to the right of the **Status** field.

### Litigation

Basic
Description
Evaluation
Allegations
Notes
Equipment
Keywords
File Mgmt

Title: Jane Smith vs. City of Smalltown

File #: 20-0002    Type: [v]    Cause: [v] ...

Attorney: SAB    Cat: P    RMAT: [v]

Attorney 2: [v] ++    Status: Open [v] ...

Team: [v]    Disposition: [v] ...

Staff: DEMO [v] ++    Cross Ref: [v] ...

OS Counsel: [v] ++    Court: [v] # [v] ...

Inves: [v]    Judge: [v]

Dept: PD [v] Police Department

Fund: [v]

Short Desc: Slip and fall on public sidewalk

#### Trial

Open: 2/14/2020 [v]

Incident: [v]

Filed: [v]

Served Dt: [v]

Assigned: [v]

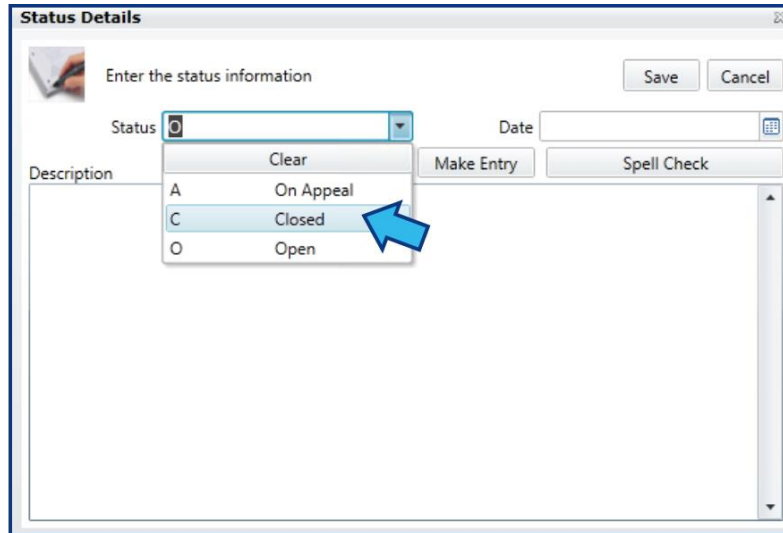
Review: [v]

Review Date: [v]

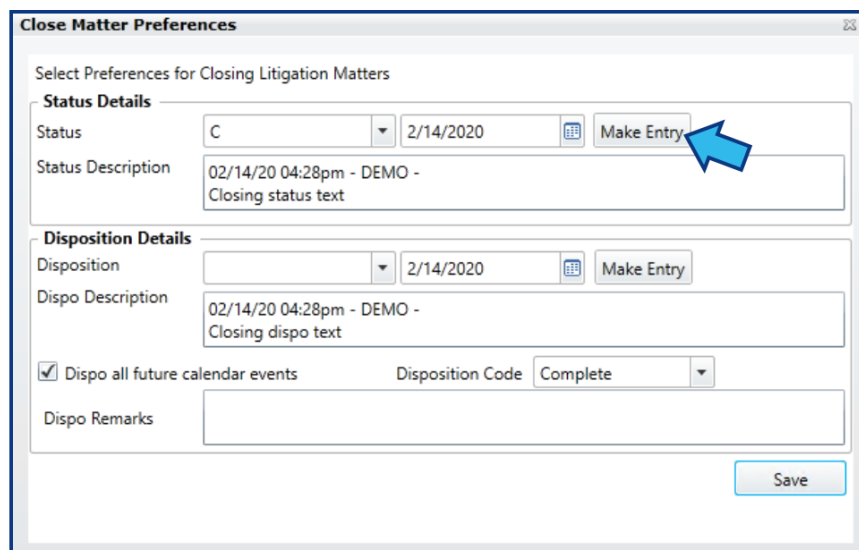
New   Search   Print   Reports   Utility   Close Matter
> Start 00:00:00 [v] [x]
Close

File #: 20-0002
File Name: Jane Smith vs. City of Smalltown
Created by: Demo Cycom User(DEMO) On: 02/14/20

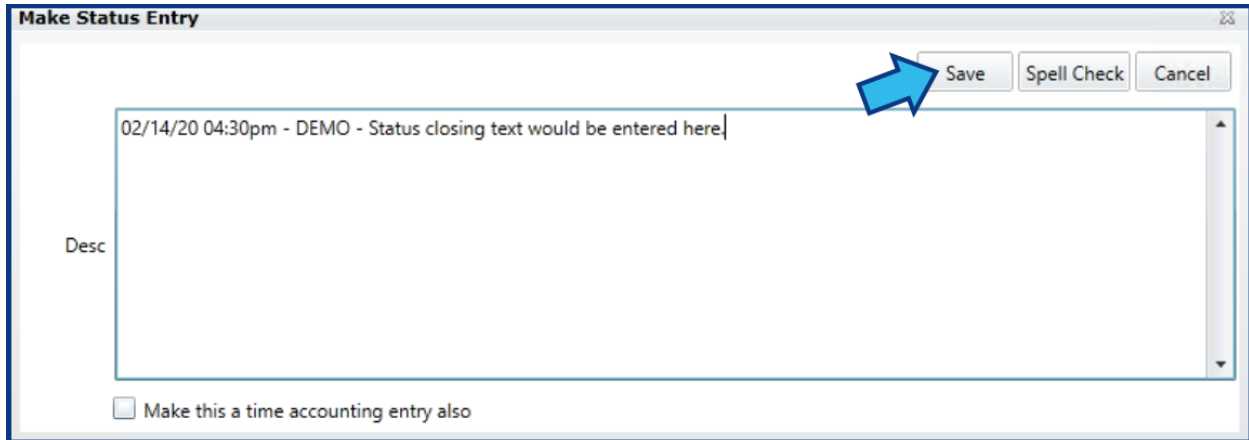
A **Status Details** window appears. Select a closed status type from the drop-down. You might only have one closed status named **Closed**. Or you might have multiple closed statuses to choose from.



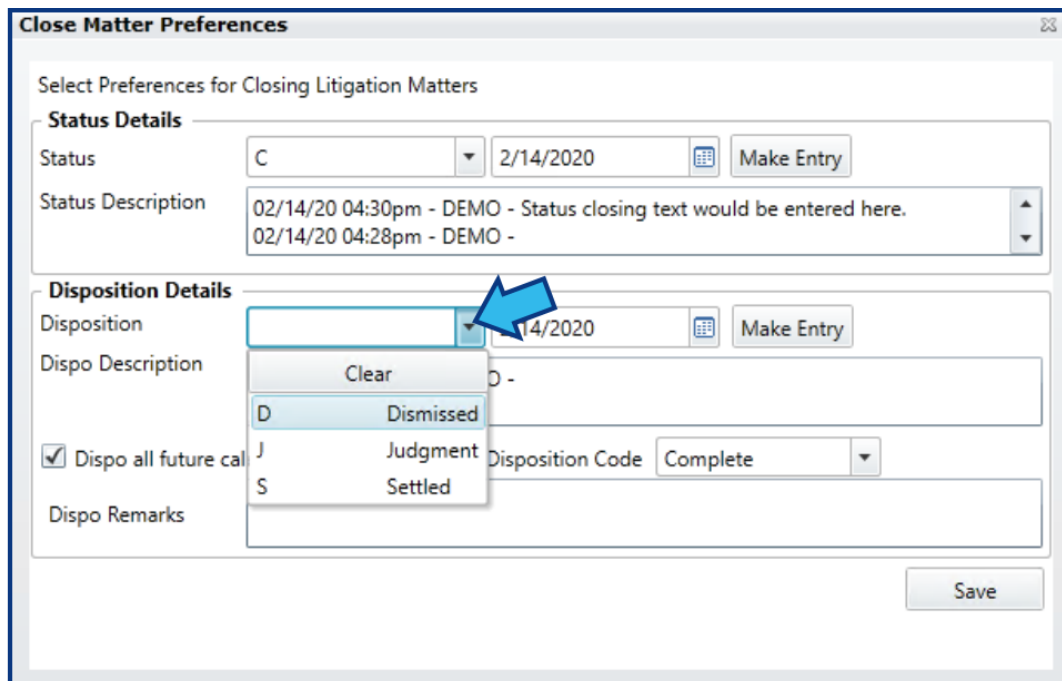
On selecting any closed type status, a **Close Matter Preferences** window will appear. By default, the **Status** will be marked with the closed status you chose, the **Status Date** field will show today's date, and the **Status Description** may be populated with a message. Select **Make Entry** to add any additional closing status text desired. (NOTE: You can enter or edit text directly in the **Status Description** box, but **CLW Best Practices** encourage using the **Make Entry** button.)



A **Make Status Entry** window appears. Today's date, time, and the **User ID** (typically the user's initials) are filled in. Enter any additional status closing text. Select **Save**.

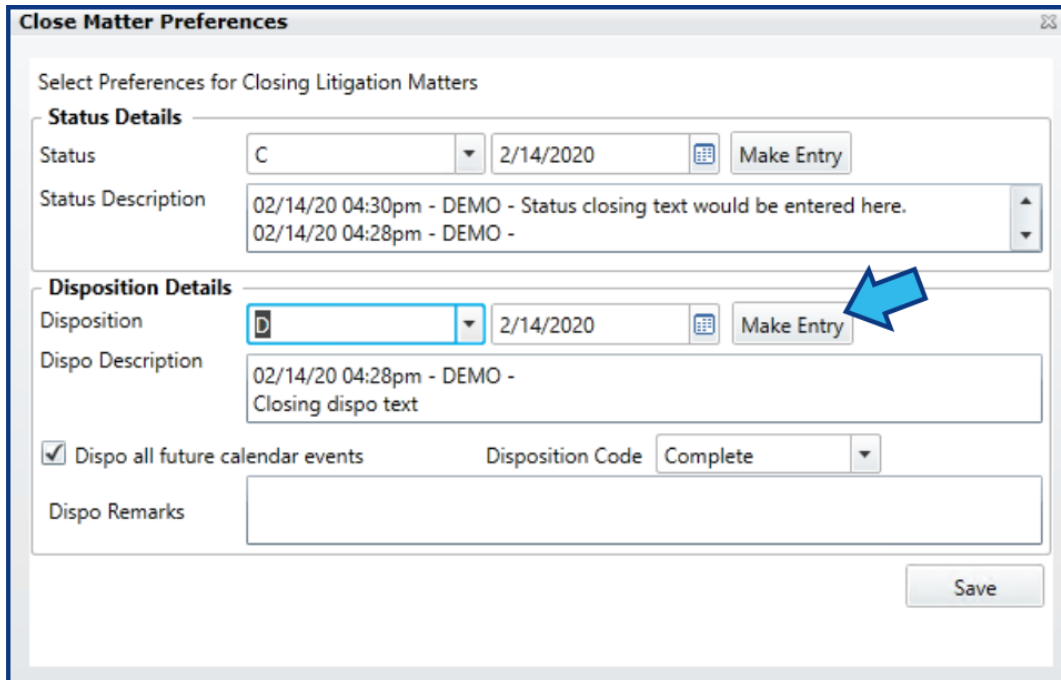


Select a **Disposition** type from the drop-down.



The **Disposition Date** will show today's date, and the **Dispo Description** may be populated with a message. Select **Make Entry** to add any additional closing dispo

text desired. (NOTE: You can enter or edit text directly in the **Dispo Description** box, but **CLW Best Practices** encourage using the **Make Entry** button.)



**Close Matter Preferences**

Select Preferences for Closing Litigation Matters

**Status Details**

Status: C 2/14/2020 **Make Entry**

Status Description: 02/14/20 04:30pm - DEMO - Status closing text would be entered here.  
02/14/20 04:28pm - DEMO -

**Disposition Details**

Disposition: D 2/14/2020 **Make Entry**

Dispo Description: 02/14/20 04:28pm - DEMO -  
Closing dispo text

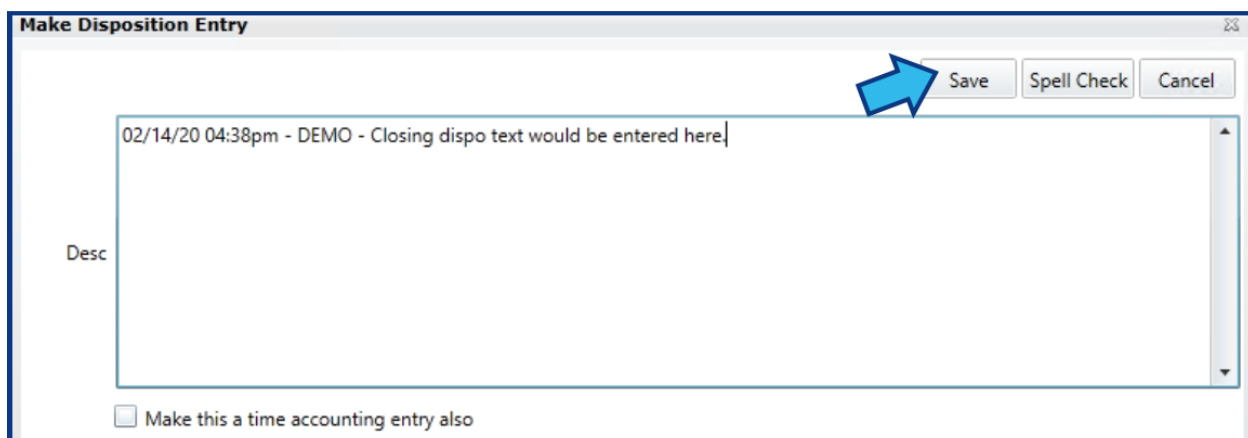
Dispo all future calendar events      Disposition Code: Complete

Dispo Remarks:

**Save**

A blue arrow points to the **Make Entry** button in the Disposition Details section.

A **Make Disposition Entry** window appears. Today's date, time, and the **User ID** (typically the user's initials) are filled in. Enter any information regarding the disposition of the matter. Select **Save**.



**Make Disposition Entry**

02/14/20 04:38pm - DEMO - Closing dispo text would be entered here

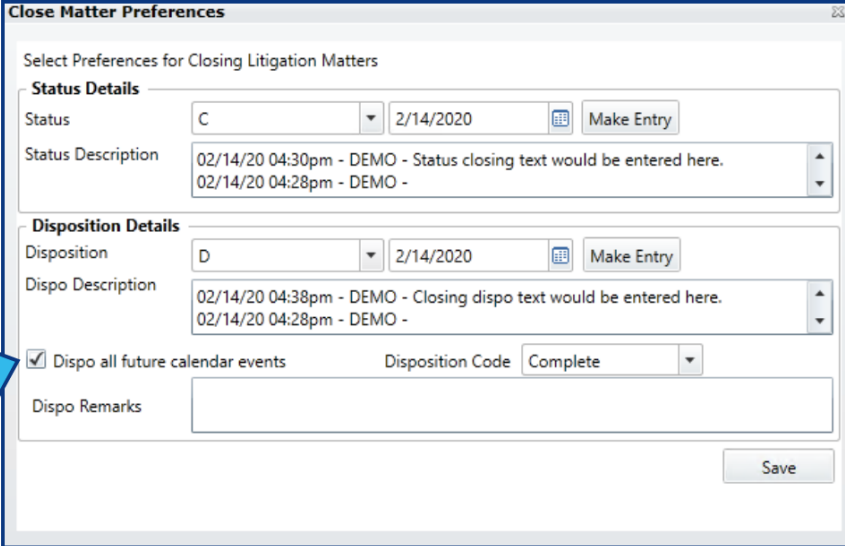
Desc

Make this a time accounting entry also

**Save** **Spell Check** **Cancel**

A blue arrow points to the **Save** button.

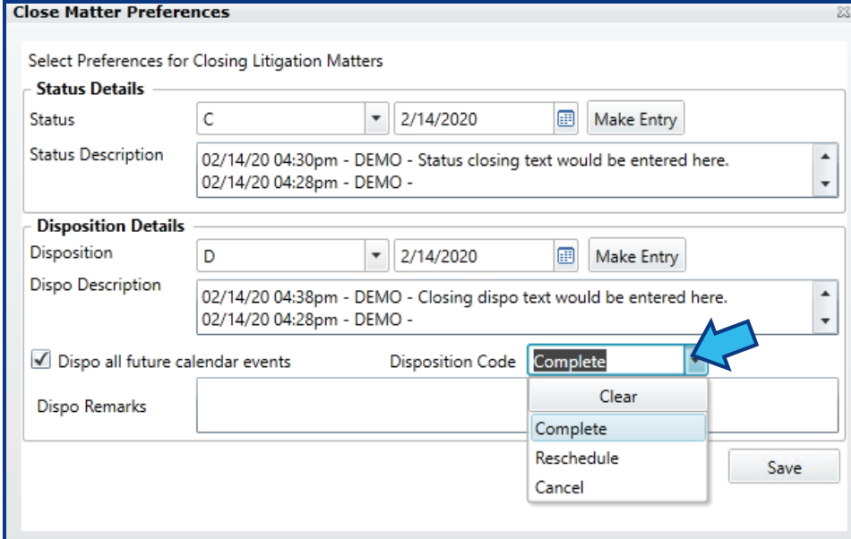
If you wish for all future calendar events that may remain on the matter to be disposed, make sure a check is placed in the box **Dispo all future calendar events**.



The image shows a screenshot of the "Close Matter Preferences" dialog box. It is titled "Close Matter Preferences" and contains the following sections:

- Status Details:** Status is set to "C" with a date of "2/14/2020" and a "Make Entry" button. Status Description is a text area containing "02/14/20 04:30pm - DEMO - Status closing text would be entered here." and "02/14/20 04:28pm - DEMO -".
- Disposition Details:** Disposition is set to "D" with a date of "2/14/2020" and a "Make Entry" button. Dispo Description is a text area containing "02/14/20 04:38pm - DEMO - Closing dispo text would be entered here." and "02/14/20 04:28pm - DEMO -".
- Dispo all future calendar events:** A checkbox is checked, and a blue arrow points to it.
- Disposition Code:** A dropdown menu is set to "Complete".
- Dispo Remarks:** An empty text area.
- Save:** A button at the bottom right.

Select a **Disposition Code** from the drop-down.

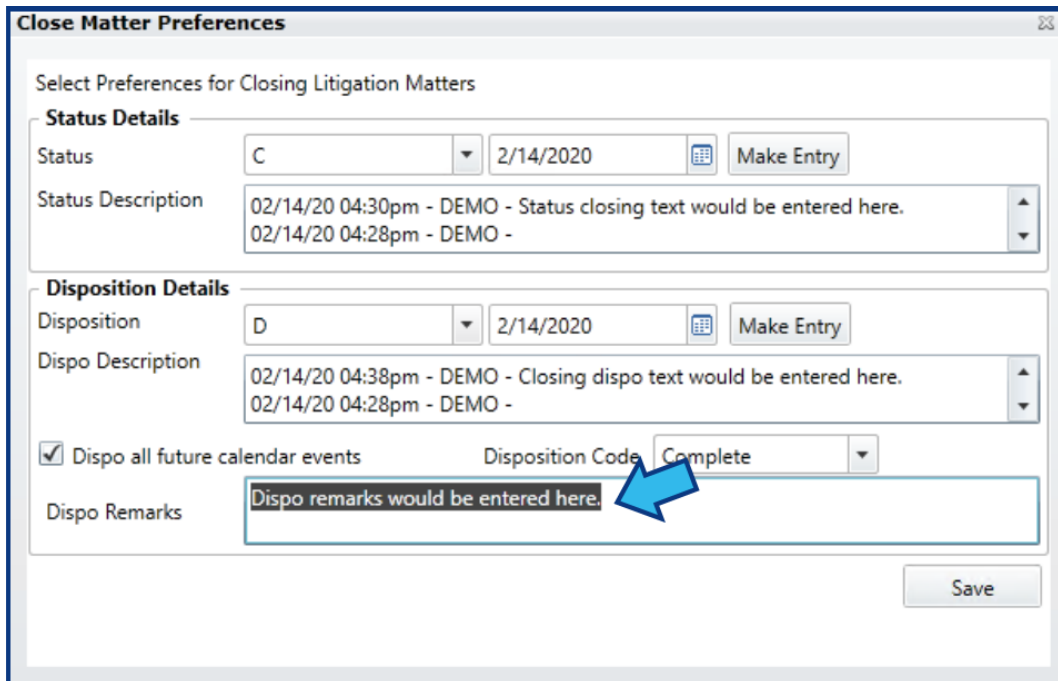


The image shows a screenshot of the "Close Matter Preferences" dialog box, similar to the one above, but with the "Disposition Code" dropdown menu open. The dropdown menu is positioned over the "Complete" option and contains the following items:

- Clear
- Complete
- Reschedule
- Cancel

A blue arrow points to the "Complete" option in the dropdown menu.

Enter any **Dispo Remarks**.



**Close Matter Preferences**

Select Preferences for Closing Litigation Matters

**Status Details**

Status: C 2/14/2020 Make Entry

Status Description: 02/14/20 04:30pm - DEMO - Status closing text would be entered here.  
02/14/20 04:28pm - DEMO -

**Disposition Details**

Disposition: D 2/14/2020 Make Entry

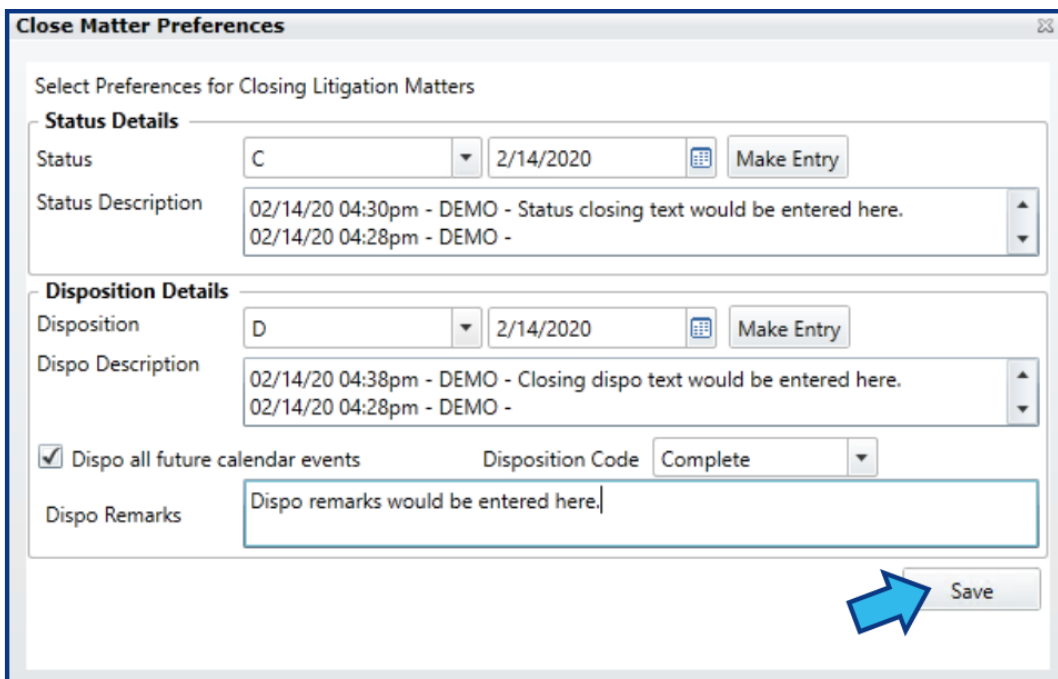
Dispo Description: 02/14/20 04:38pm - DEMO - Closing dispo text would be entered here.  
02/14/20 04:28pm - DEMO -

Dispo all future calendar events Disposition Code: Complete

Dispo Remarks: Dispo remarks would be entered here.

Save

Select **Save**.



**Close Matter Preferences**

Select Preferences for Closing Litigation Matters

**Status Details**

Status: C 2/14/2020 Make Entry

Status Description: 02/14/20 04:30pm - DEMO - Status closing text would be entered here.  
02/14/20 04:28pm - DEMO -

**Disposition Details**

Disposition: D 2/14/2020 Make Entry

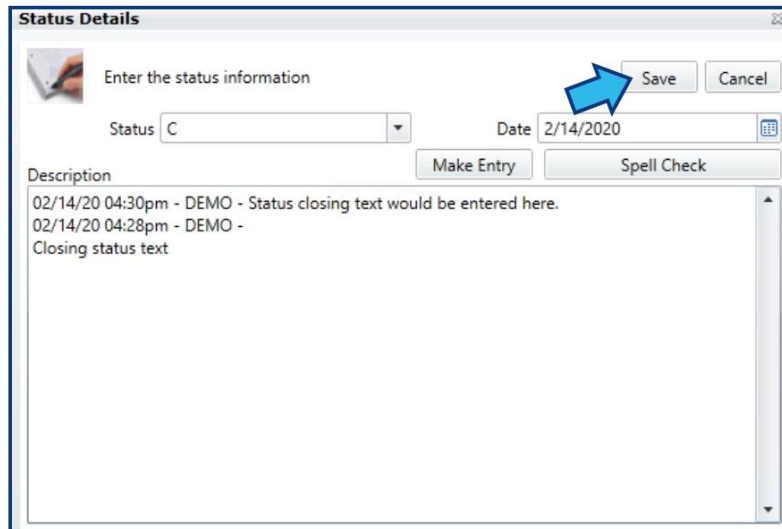
Dispo Description: 02/14/20 04:38pm - DEMO - Closing dispo text would be entered here.  
02/14/20 04:28pm - DEMO -

Dispo all future calendar events Disposition Code: Complete

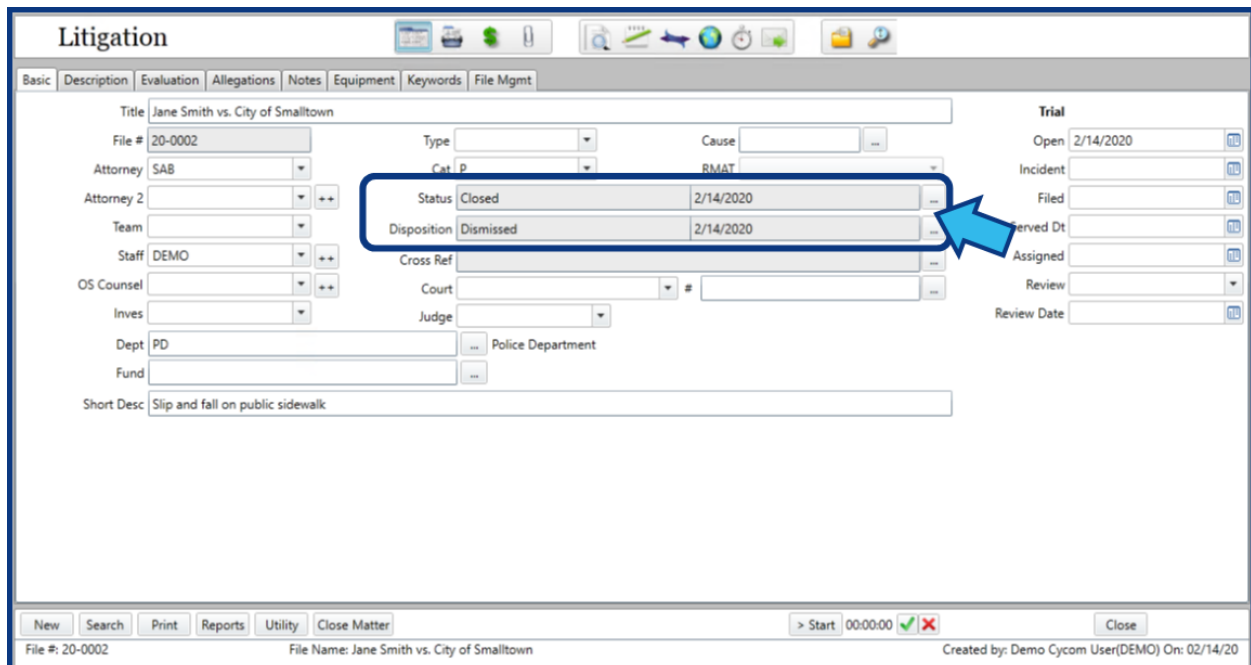
Dispo Remarks: Dispo remarks would be entered here.

Save

You will return to the **Status Details** window. Select **Save**.



Now your matter status is set to **Closed** and will no longer appear in **Searches** or **Reports** limited to **Open Matters**. It will remain searchable and will remain in reports referencing **Closed Matters**.

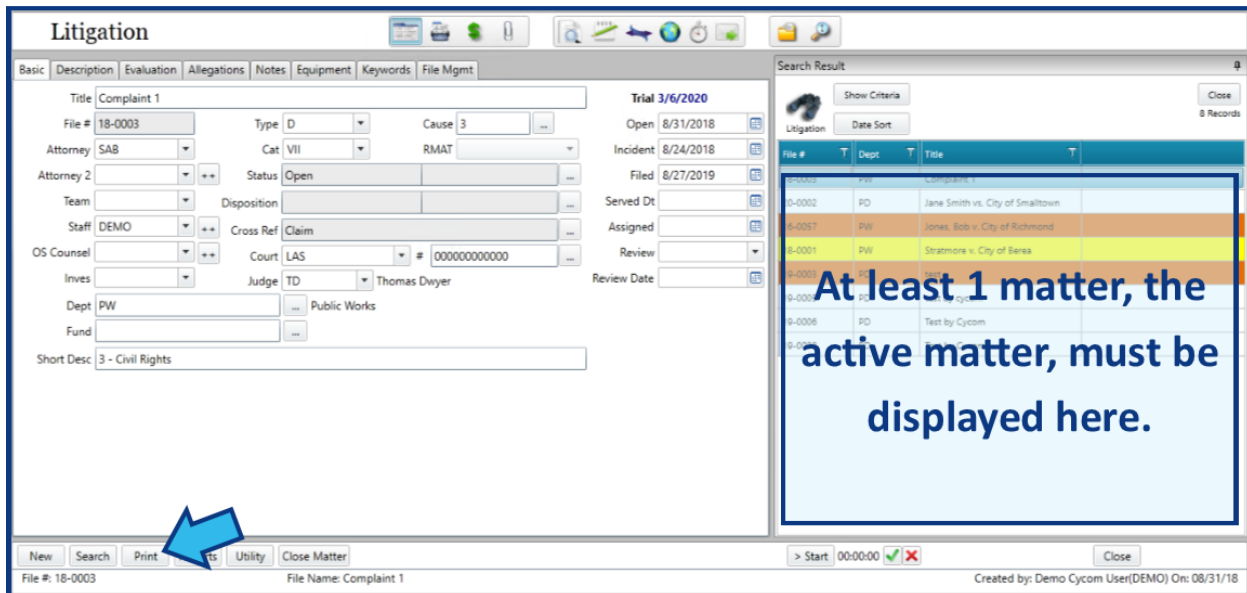


## Litigation Report Options

- [Print Customized Litigation Reports](#)
- [Create Built-in Litigation Reports](#)

### Print Customized Litigation Reports

Customized reports can be created by first executing a **Search** to find the **Litigation** matters you want to include. Once at least 1 matter is displayed in the **Search Result** pane, select the **Print** button in the action bar at the bottom.



The screenshot shows the 'Litigation' application window. On the left is a form for entering case details like Title, File #, Attorney, and Status. On the right is a 'Search Result' pane containing a table of search results. A blue box highlights the table with the text: 'At least 1 matter, the active matter, must be displayed here.' At the bottom of the application, a 'Print' button is highlighted with a blue arrow.

File #	Dept	Title
9-0002	PD	Jane Smith vs. City of Smalltown
9-0057	PW	Jones, Bob v. City of Richmond
9-0001	PW	Stramore v. City of Brea
9-0003	PD	...
9-0004	PD	...
9-0006	PD	Test by Cycom
9-0005	PD	...

If you want to create a report for only the active matter, be sure to check the box for **Selected matter only**. If this box is unchecked, any report will include all the matters listed in the **Search Results**.

**Litigation Printing**

Choose Report menu option

Selected matter only

Print Search criteria

Print Confidential Footer

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One Line Report

Multi-line Report

Initial Litigation Report

Case Disposition Report

Detail Page

Key Dates report

Folder Labels (Avery 5366)

Folder Labels (Avery 4150)

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Custom List

Litigation Status Report

Close

Select the type of report you'd like to generate. Some reports allow additional options and you will be prompted to make your selections. Your report will be displayed with options to print or export.

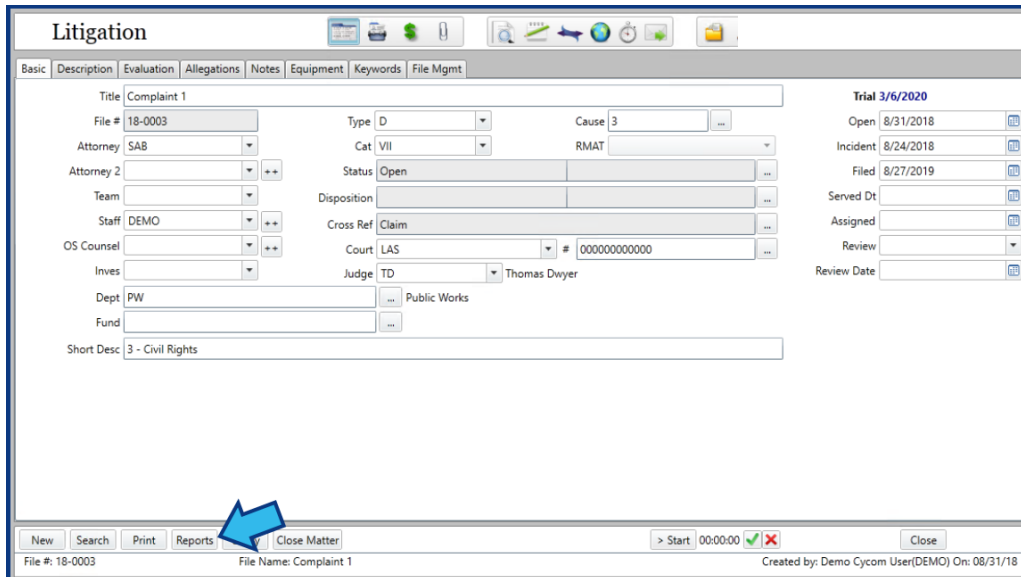
**Print** ↓

↑ **Export**

City Attorney Litigation Manager's Report										
Case Number	Case#	Filed	Judge	Dept	Attorney	Plaintiff Atty	MSJ	FSC	Trial	Status
Jones, Bob v. City of Richmond	18-12340-A	7/9/2018		Public Works	Sarah A. Boyd	Edna Ward				Open
Stratmore v. City of Berea	18-1234-B	7/2/2018		Public Works	Sarah A. Boyd	William Hendle, Frank Tatum			2/4/2019	Open
Complaint 1	000000000000	8/27/2019	Thomas Dwyer	Public Works	Sarah A. Boyd	John Doe			3/6/2020	Open
test				Police Department	U. S. Mail					Closed
test by cycom				Police Department	Sarah A. Boyd	David Q Jones				Closed
Test by Cycom				Police Department	Sarah A. Boyd					Closed
Test by Cycom	123		Thomas Dwyer	Police Department	Sarah A. Boyd				8/25/2020	Open
Jane Smith vs. City of Smalltown				Police Department	Sarah A. Boyd					Closed

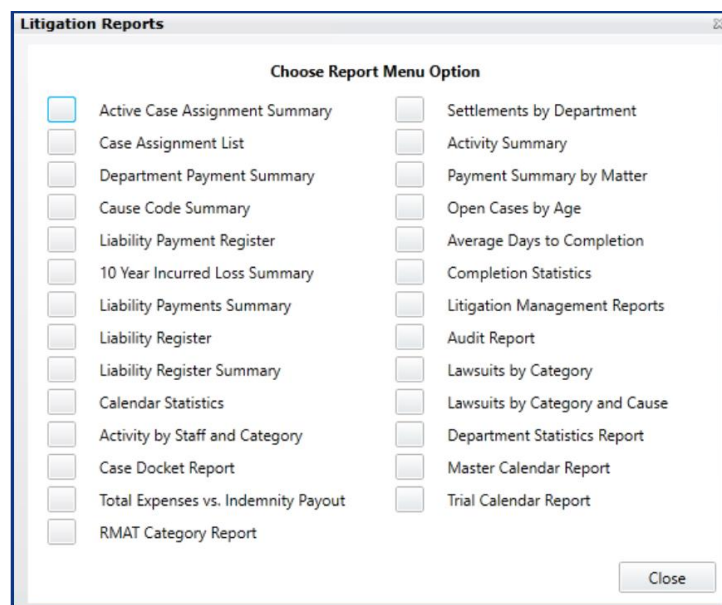
## Create Built-in Litigation Reports

There are numerous built-in **Litigation** reports to choose from. To access these reports, select the **Reports** button from the action bar at the bottom.



The screenshot shows the 'Litigation' case management interface. The main area contains various fields for case information, including Title, File # (18-0003), Type (D), Cause (3), Attorney (SAB), Cat (VII), Status (Open), Disposition, Cross Ref (Claim), Court (LAS), Judge (TD Thomas Dwyer), Dept (PW), and Short Desc (3 - Civil Rights). A blue arrow points to the 'Reports' button in the bottom action bar, which is located next to 'New', 'Search', 'Print', and 'Close Matter'.

The **Litigation Reports** will appear. Select the report you wish to view. Some reports allow additional customization options and you will be prompted to make your selections. Your report will be displayed once you have made your selections.



The 'Litigation Reports' dialog box is titled 'Choose Report Menu Option'. It contains a list of 24 report options, each with an unchecked checkbox:

- Active Case Assignment Summary
- Case Assignment List
- Department Payment Summary
- Cause Code Summary
- Liability Payment Register
- 10 Year Incurred Loss Summary
- Liability Payments Summary
- Liability Register
- Liability Register Summary
- Calendar Statistics
- Activity by Staff and Category
- Case Docket Report
- Total Expenses vs. Indemnity Payout
- RMAT Category Report
- Settlements by Department
- Activity Summary
- Payment Summary by Matter
- Open Cases by Age
- Average Days to Completion
- Completion Statistics
- Litigation Management Reports
- Audit Report
- Lawsuits by Category
- Lawsuits by Category and Cause
- Department Statistics Report
- Master Calendar Report
- Trial Calendar Report


A 'Close' button is located at the bottom right of the dialog box.

## Litigation Basic Matter Data Fields

- [Basic Tab](#)
- [Description Tab](#)
- [Evaluation Tab](#)
- [Allegations Tab](#)
- [Notes Tab](#)
- [Equipment Tab](#)
- [Keywords Tab](#)
- [File Management Tab](#)

### Basic Tab

Litigation



Basic | Description | Evaluation | Allegations | Notes | Equipment | Keywords | File Mgmt

Title <input type="text" value="Jane Smith vs. City of Smalltown"/>			<b>Trial</b>		
File # <input type="text" value="20-0002"/>	Type <input type="text"/>	Cause <input type="text"/>	Open <input type="text" value="2/14/2020"/>		
Attorney <input type="text" value="SAB"/>	Cat <input type="text" value="P"/>	RMAT <input type="text"/>	Incident <input type="text"/>		
Attorney 2 <input type="text"/>	Status <input type="text" value="Closed"/>	<input type="text" value="2/14/2020"/>	Filed <input type="text"/>		
Team <input type="text"/>	Disposition <input type="text" value="Dismissed"/>	<input type="text" value="2/14/2020"/>	Served Dt <input type="text"/>		
Staff <input type="text" value="DEMO"/>	Cross Ref <input type="text"/>	<input type="text"/>	Assigned <input type="text"/>		
OS Counsel <input type="text"/>	Court <input type="text"/>	# <input type="text"/>	Review <input type="text"/>		
Inves <input type="text"/>	Judge <input type="text"/>	<input type="text"/>	Review Date <input type="text"/>		
Dept <input type="text" value="PD"/>	<input type="text" value="Police Department"/>				
Fund <input type="text"/>	<input type="text"/>				
Short Desc <input type="text" value="Slip and fall on public sidewalk"/>					

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

File #: 20-0002
File Name: Jane Smith vs. City of Smalltown
Created by: Demo Cycom User(DEMO) On: 02/14/20

**Title**

A descriptive title for the matter.

**File #**

The **CLW Litigation** matter **File Number**. This will be auto-generated upon selecting **Auto** when creating a new **Litigation** matter.

**Attorney**

The lead attorney on the matter.

**Attorney 2**

Additional attorneys on the matter. (NOTE: **CLW** limits the number of second attorneys to 4)

**Team**

If your office divides work assignments by team, the assigned team for this matter is selected for this field.

**Staff**

Any staff assigned to assist with this matter.

**OS Counsel**

Outside counsel assigned to this matter.

**Investigator**

The investigator assigned to this matter.

**Department**

The department represents the entity to whom the services of the **Litigation** are being rendered.

**Funding Source**

The funding source for this matter.

## **Short Description**

A text field to enter a brief description of the matter.

## **Type**

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

## **Category**

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

## **Cause**

The cause code for the matter.

## **RMAT**

The **RMAT** code for the matter.

## **Status**

The current state of the matter. Status codes are classified as either open or closed types and these are used in searches and reports to limit selections to those types. One common observance of this in practice is the user's **My Open Matters** list in **Skyline** or **Main Street** view.

## **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 disposed.

## **Cross Reference**

A list of other matters that should be referenced to the current matter.

## **Court**

The court code for the court that will see this matter.

**Court #**

This field may be used to refer to a specific courtroom number, or it may be used to enter a court filing number for the matter. Check with your **System Administrator** or **Office Manager** to confirm how your site uses this field.

**Judge**

The judge that will preside over this matter.

**DR #**

The **Defendant Record** number for this matter.

**Open Date**

The date the matter was opened.

**Incident Date**

The date the matter incident occurred.

**Filed Date**

The date the matter was filed.

**Board Date**

The board date of the matter.

**Assigned Date**

The date the matter was assigned.

**Review**

The date the matter is scheduled for review.

**CAR Transmit Date**

The date the **CAR** was transmitted.

## Legal Hold label

A check indicates this matter has a **Legal Hold** applied. Fields are not editable when this is applied. Some exceptions can be allowed by the **System Administrator**. Only a **System Administrator**, or someone with access to the Admin password, can apply a **Legal Hold** on a matter.

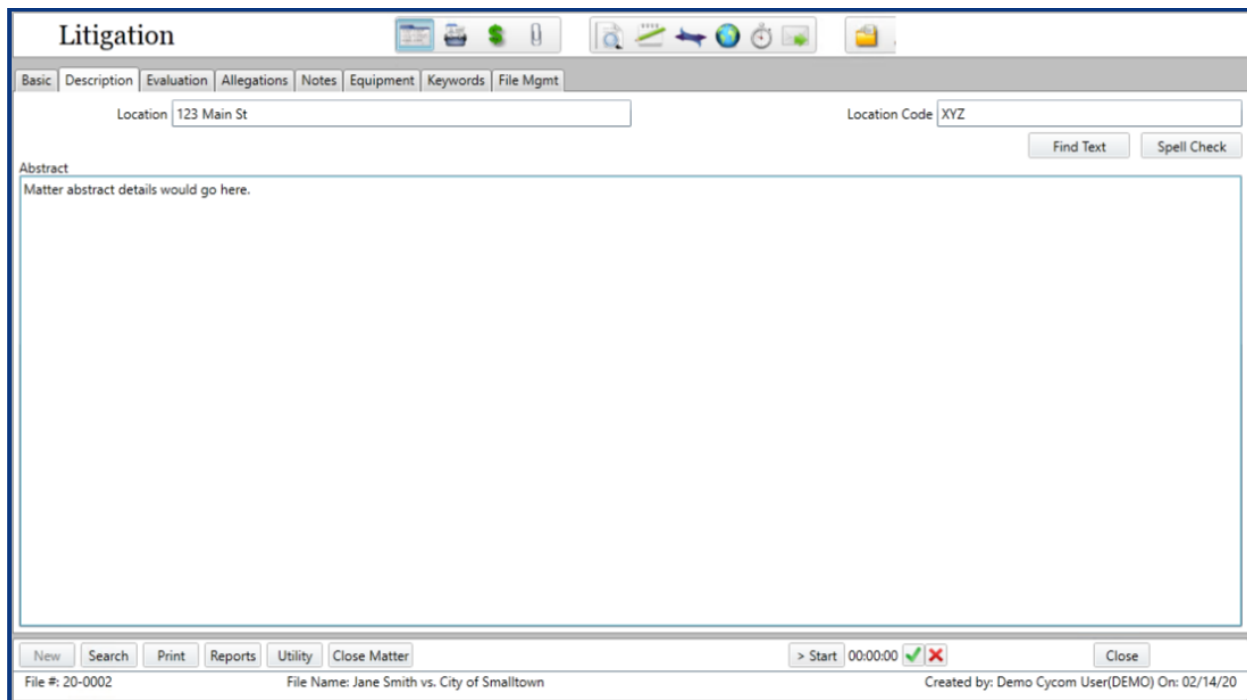
## CMS Reportable

A check indicates this matter is **CMS Reportable**.

## Alleged Cause

The alleged cause of this matter.

## Description Tab



The screenshot displays the 'Litigation' software interface. At the top, there is a title bar with the word 'Litigation' and several icons. Below the title bar is a menu bar with tabs for 'Basic', 'Description', 'Evaluation', 'Allegations', 'Notes', 'Equipment', 'Keywords', and 'File Mgmt'. The 'Description' tab is currently selected. In the main area, there are two input fields: 'Location' with the text '123 Main St' and 'Location Code' with the text 'XYZ'. To the right of these fields are two buttons: 'Find Text' and 'Spell Check'. Below these fields is a large text area labeled 'Abstract' with the placeholder text 'Matter abstract details would go here.' At the bottom of the window, there is a status bar with several buttons: 'New', 'Search', 'Print', 'Reports', 'Utility', and 'Close Matter'. To the right of these buttons is a progress indicator showing '> Start 00:00:00' with a green checkmark and a red X. Further right is a 'Close' button. The status bar also contains the following text: 'File #: 20-0002', 'File Name: Jane Smith vs. City of Smalltown', and 'Created by: Demo Cycom User(DEMO) On: 02/14/20'.

## Location

This field may be used to note the location of the incident or the location of matter files. Check with your **System Administrator** or **Office Manager** to confirm how your site uses this field.

**Location Code**

The location code for this matter.

**Council Dist**

The council district in which this matter occurred or in which this matter is being prosecuted. Check with your **System Administrator** or **Office Manager** to confirm how your site uses this field.

**Find Text**

An action button that opens a text search tool.

**Spell Check**

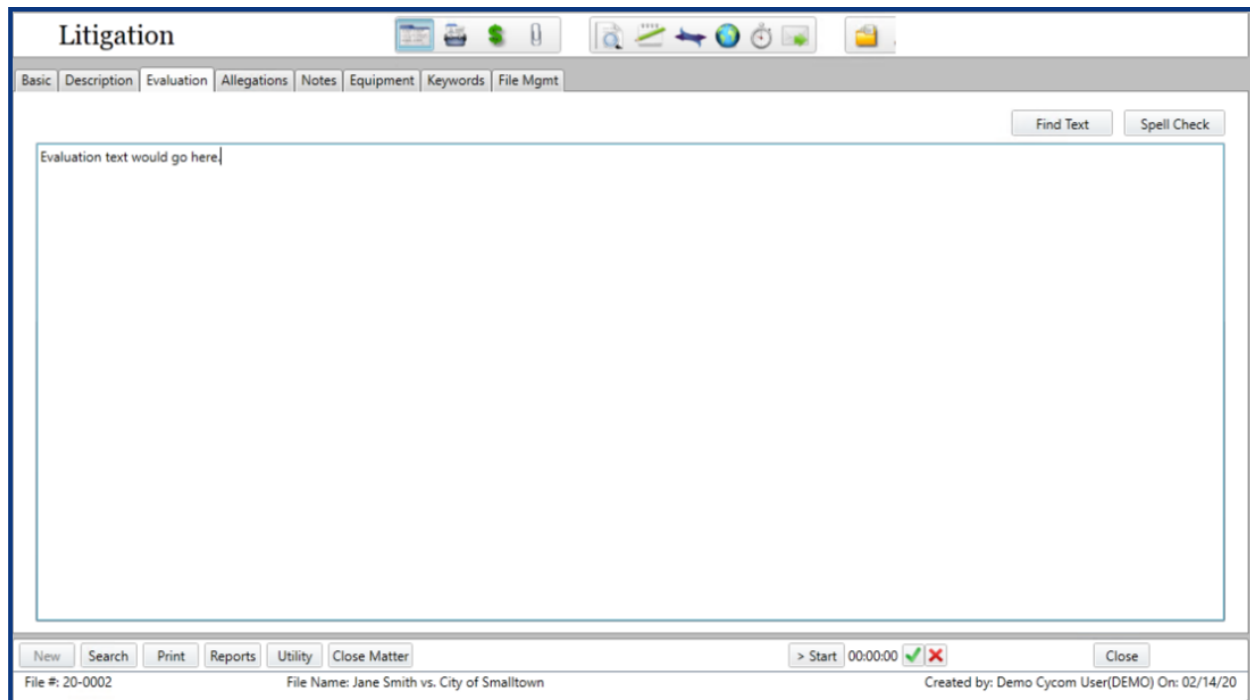
An action button that opens a spell-checking tool.

**Abstract**

An unlimited text field to enter the matter abstract and/or any additional description of the matter.

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## Evaluation Tab



### Find Text

An action button that opens a text search tool.

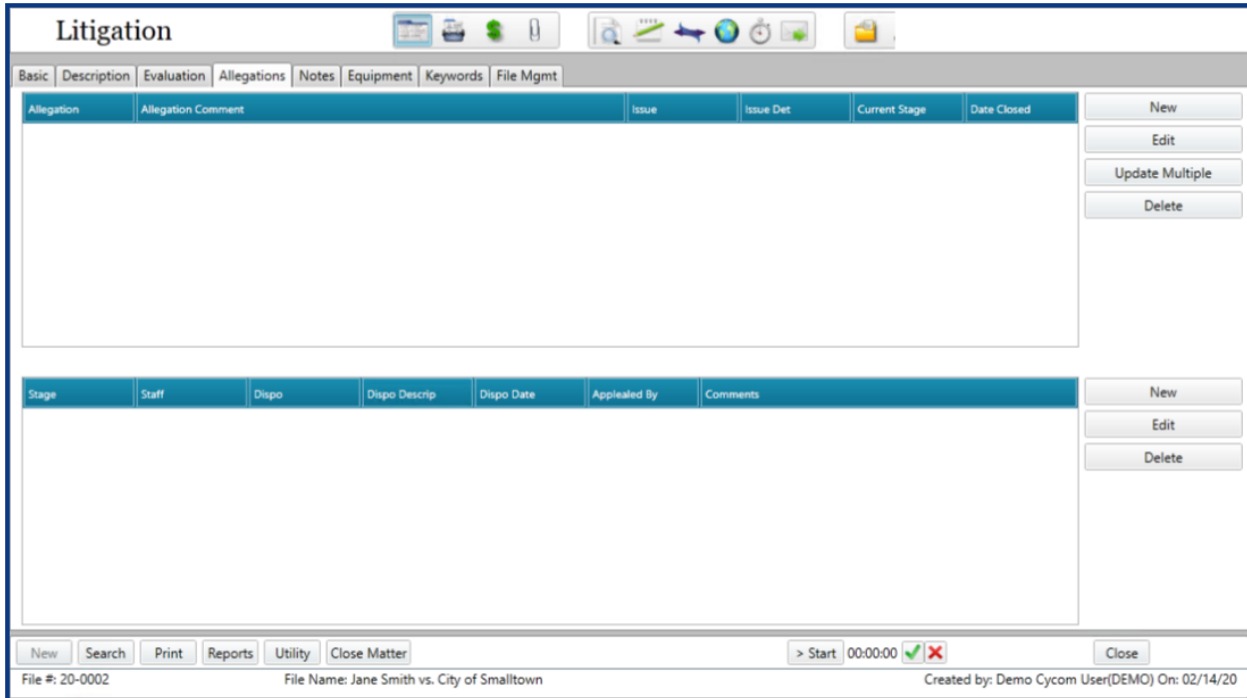
### Spell Check

An action button that opens a spell-checking tool.

### Unlabeled Text Field

An unlimited text field to enter any evaluation details of the matter.

## Allegations Tab



The screenshot shows the 'Litigation' application window with the 'Allegations' tab selected. The interface is divided into two main sections. The top section is a table with columns: Allegation, Allegation Comment, Issue, Issue Det, Current Stage, and Date Closed. To the right of this table are buttons for 'New', 'Edit', 'Update Multiple', and 'Delete'. The bottom section is a table with columns: Stage, Staff, Dispo, Dispo Descrip, Dispo Date, Appealed By, and Comments. To the right of this table are buttons for 'New', 'Edit', and 'Delete'. At the bottom of the window, there is a status bar with buttons for 'New', 'Search', 'Print', 'Reports', 'Utility', and 'Close Matter'. It also displays 'File #: 20-0002', 'File Name: Jane Smith vs. City of Smalltown', a timer '> Start 00:00:00', and 'Created by: Demo Cycom User(DEMO) On: 02/14/20'.

The **Allegations** tab contains 2 sections. The top section displays a list of allegations. The lower section displays a list of allegation stages for the allegation highlighted in the top section.

### **New (top section)**

An action button that opens the **Add Allegation** tool to create a new allegation.

### **Edit (top section)**

An action button that opens the **Edit Allegation** tool to edit an allegation entry.

### **Update Multiple**

An action button that opens the **Update Multiple Allegations** tool to change multiple allegations. To become enabled, multiple allegations must be selected (highlighted in blue). To select multiple allegations, hold down the **CTRL** key while making selections with the left mouse button.

### Delete (top section)

An action button that deletes the selected allegation entry.

### New (lower section)

An action button that opens the **Add Allegation Stage** tool to create a new allegation stage.

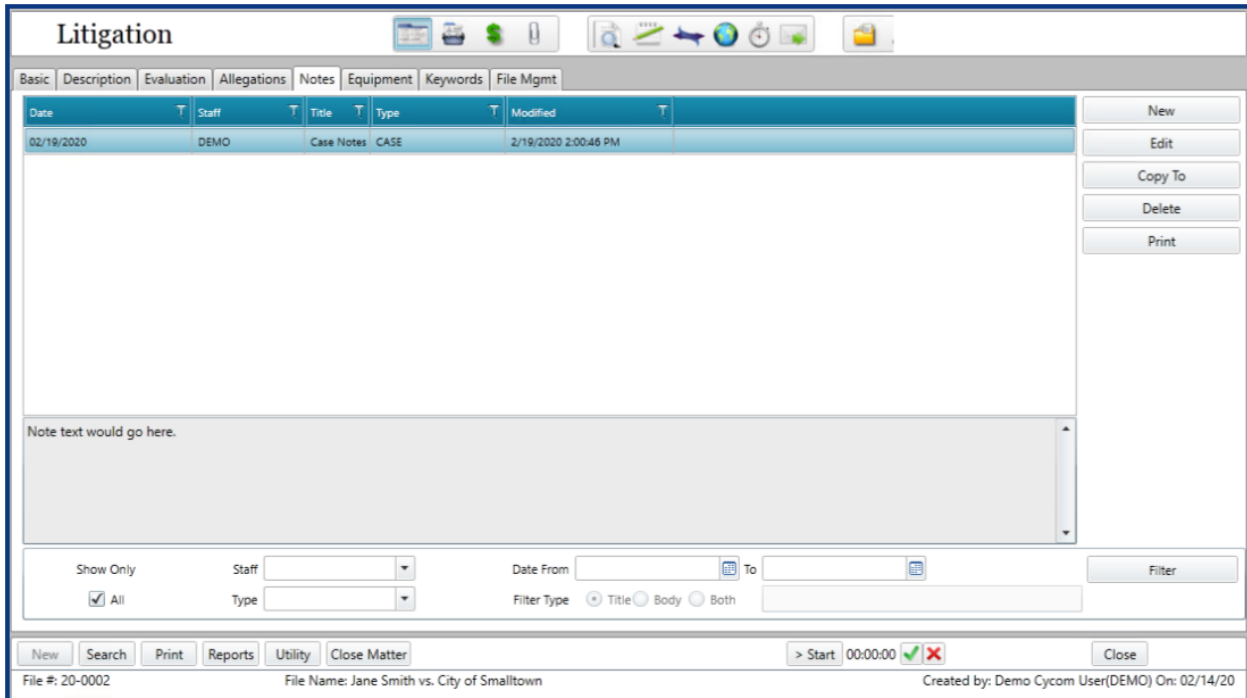
### Edit (lower section)

An action button that opens the **Edit Allegation Stage** tool to edit an allegation stage entry.

### Delete (lower section)

An action button that deletes the selected allegation stage entry.

## Notes Tab



The screenshot shows the 'Litigation' application window with the 'Notes' tab selected. The interface includes a table with columns for Date, Staff, Title, Type, and Modified. A single entry is visible: Date: 02/19/2020, Staff: DEMO, Title: Case Notes, Type: CASE, Modified: 2/19/2020 2:00:46 PM. To the right of the table are buttons for New, Edit, Copy To, Delete, and Print. Below the table is a text area for notes with the placeholder text 'Note text would go here.'. At the bottom, there are filter controls including 'Show Only' (with a checked 'All' option), 'Staff' and 'Type' dropdown menus, 'Date From' and 'To' date pickers, and 'Filter Type' radio buttons for Title, Body, and Both. The footer of the application shows 'File #: 20-0002', 'File Name: Jane Smith vs. City of Smalltown', and 'Created by: Demo Cycom User(DEMO) On: 02/14/20'.

Date	Staff	Title	Type	Modified
02/19/2020	DEMO	Case Notes	CASE	2/19/2020 2:00:46 PM

The **Notes** tab displays a list of notes that can be sorted using the list column headings and filtered using the filter options. A gray box at the bottom shows a preview of the highlighted note in the list above.

### **New**

An action button that opens the **Memo Field Description** tool to create a new note.

### **Edit**

An action button that opens the **Memo Field Description** tool to edit a note.

### **Copy To**

An action button that opens the **Select Matter** tool to select a matter to which to copy the selected note. The original and copied note will exist separately in the database. Edits to one will not affect the other.

### **Delete**

An action button that deletes the selected note.

### **Print**

An action button that creates a report listing all the notes in the notes list. The report can be printed or exported.

### **Show Only All**

Checking this box shows all the notes. Uncheck this box if you'd like to filter the list using any of the parameters provided.

### **Staff**

Filter the notes to show only those created by a specific staff person.

### **Type**

Filter the notes to show only those of a specific type.

## Date From/To

Filter the notes according to a specific date range.

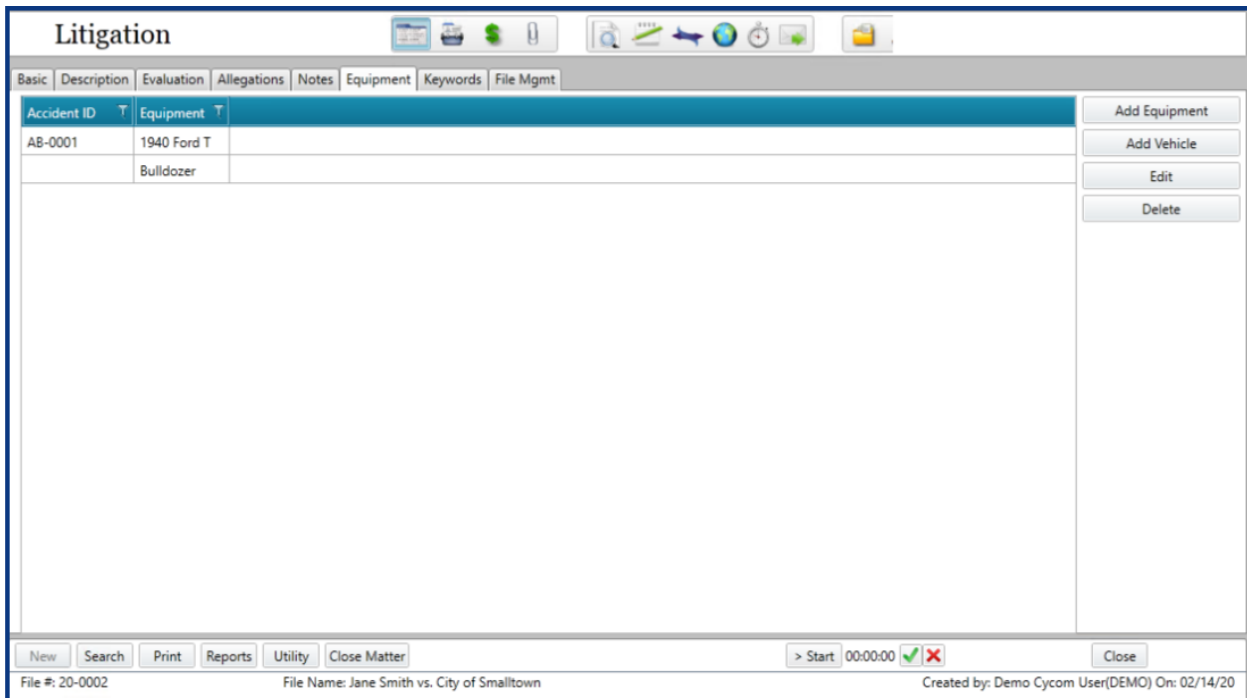
## Filter Type

Radio buttons to select to filter the notes by **Title**, **Body**, or **Both**. The text field to the right of the buttons is used to enter the filter terms.

## Filter

An action button to filter the note list according to the parameters selected or entered. NOTE: To filter the notes list, uncheck the **Show Only All** box.

## Equipment Tab



Accident ID	Equipment
AB-0001	1940 Ford T Bulldozer

The **Equipment** tab displays a list of equipment and/or vehicles involved in the matter.

## Add Equipment

An action button that opens the **Add Equipment Form** tool to create a new equipment entry.

## Add Vehicle

An action button that opens the **Vehicle Add Form** tool to create a new vehicle entry.

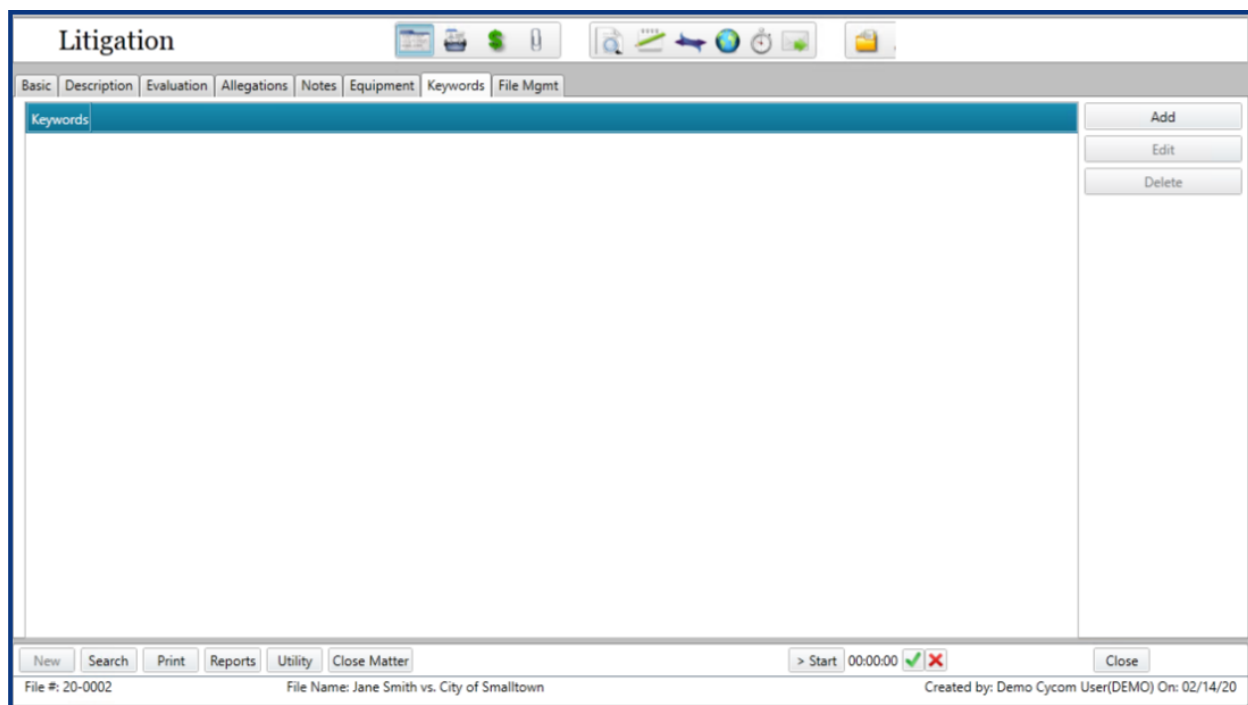
## Edit

An action button that opens the **Edit Equipment Form** or **Vehicle Edit Form** tool to edit the selected equipment or vehicle entry.

## Delete

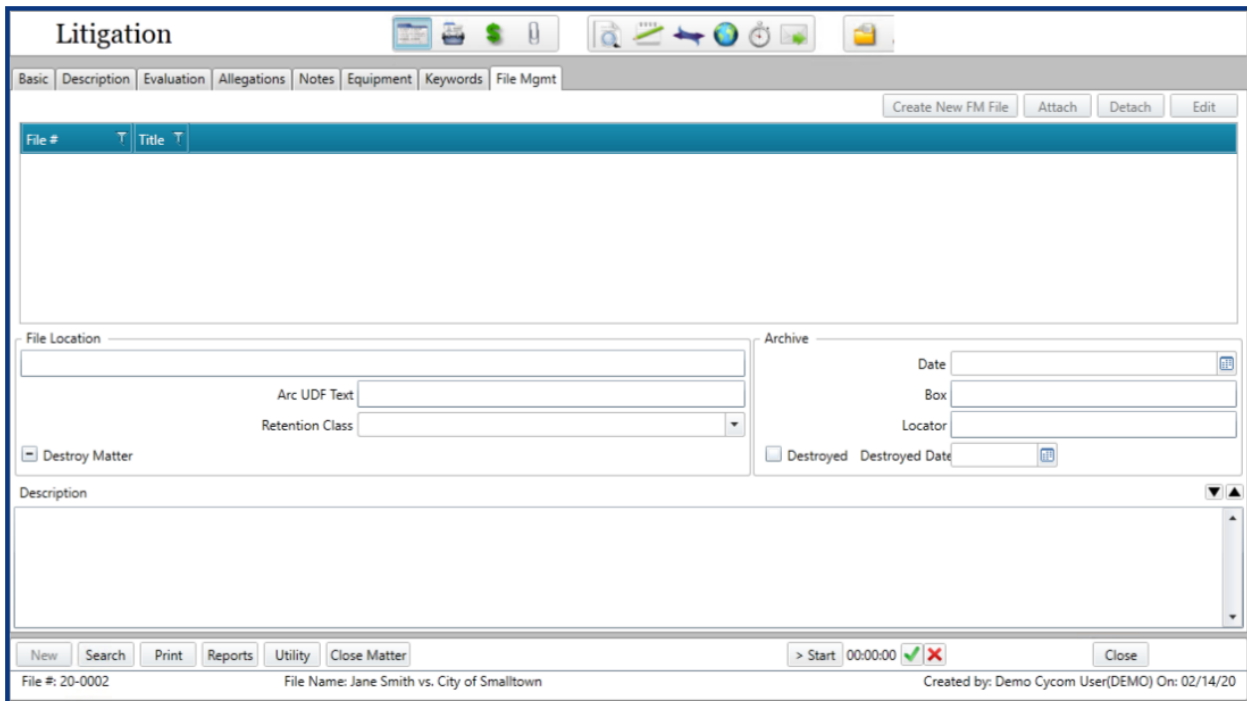
An action button that deletes the selected equipment or vehicle entry.

## Keywords Tab



The **Keywords** tab displays a list of keywords. The use of keywords is no longer needed because of the full text search capabilities in **CLW**. Because of this your keywords tab may be inactive or missing. **CLW Best Practices** discourages using keywords, and instead encourages attention to proper spelling in all documents and text fields. All unlimited text fields in **CLW** have a **Spell Check** button for this purpose.

## File Management Tab



The screenshot shows the 'Litigation' application window with the 'File Mgmt' tab selected. The interface includes a menu bar with options: Basic, Description, Evaluation, Allegations, Notes, Equipment, Keywords, and File Mgmt. Below the menu bar are buttons for 'Create New FM File', 'Attach', 'Detach', and 'Edit'. The main area contains a table with columns 'File #' and 'Title'. Below the table are input fields for 'File Location', 'Arc UDF Text', and 'Retention Class'. There are also checkboxes for 'Destroy Matter' and 'Destroyed', along with a 'Destroyed Date' field. The 'Archive' section includes fields for 'Date', 'Box', and 'Locator'. A 'Description' field is located below the 'Destroyed' section. At the bottom, there is a status bar with buttons for 'New', 'Search', 'Print', 'Reports', 'Utility', and 'Close Matter'. The status bar also displays 'File #: 20-0002', 'File Name: Jane Smith vs. City of Smalltown', and 'Created by: Demo Cycom User(DEMO) On: 02/14/20'.

The **File Management** tab has fields to enter file storage, archival, and destruction information. There are 4 buttons at the top right named **Create New FM File**, **Attach**, **Detach**, and **Edit**. These allow you to create a file management file (available if you have the **File Management** module), and to attach or detach additional matters to this matter.