CityLaw/CountyLaw

Training Notes - Assignments Module

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 or by calling **888-292-6688**.

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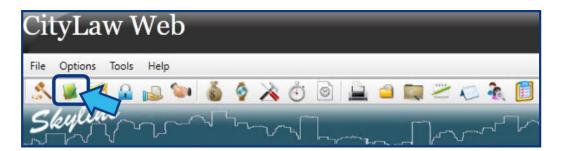


Assignments Basic Actions

- Open the Assignments Module
- Create a New Assignments Matter
- Find an Assignments Matter
- Close an Assignments Matter

Open the Assignments Module

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

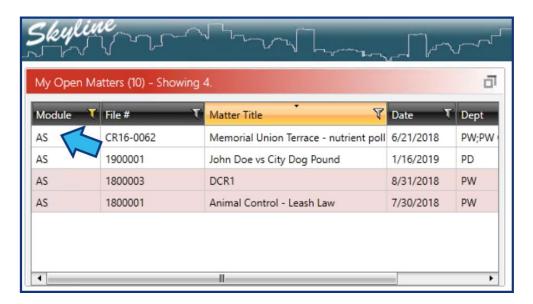


It can also be opened by selecting **File** from the **Menu Bar** and then selecting **Assignments** from the list of options.

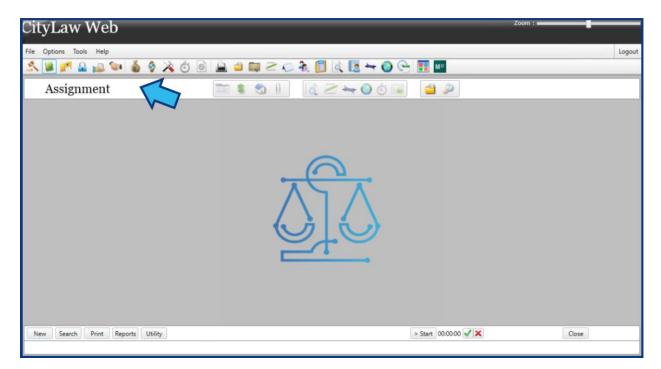




Finally, it can be opened by opening an **Assignments** matter. For example, if an **Assignments** matter is in the **My Open Matters** display in the **Skyline** view, then double-clicking on that matter will open the **Assignments** module.



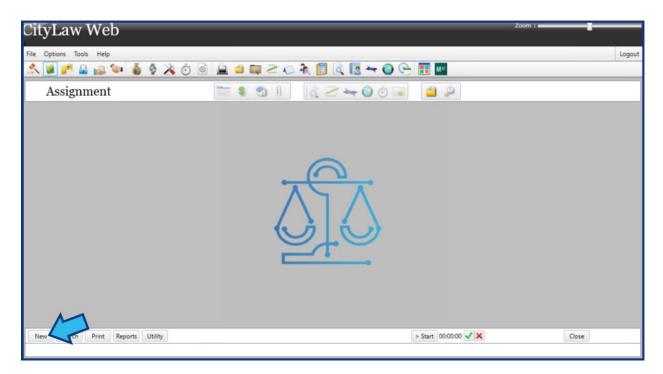
You will know you are in the **Assignments** module when you see the **Assignments** header.



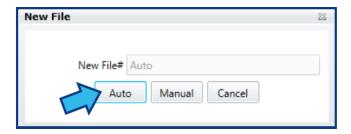


Create a New Assignments Matter

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

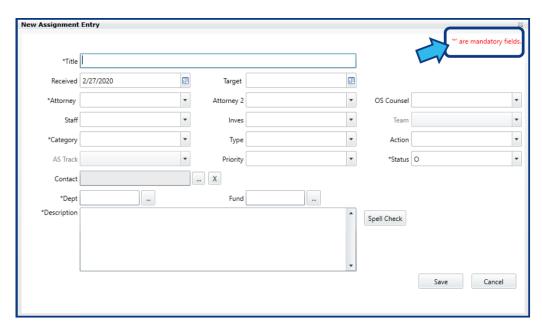


You will be prompted to create a new **File Number**. Select the **Auto** button to have this number automatically assigned with the next available number.

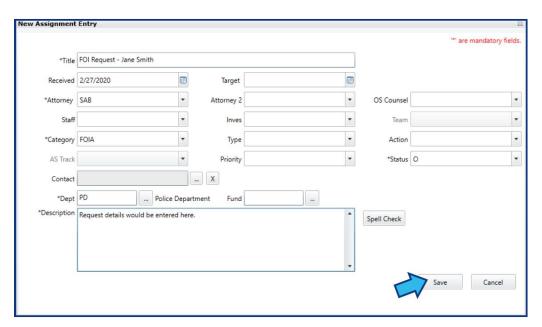




Enter the matter information into the **New Assignment Entry** window. Note that mandatory fields are marked with an asterisk.

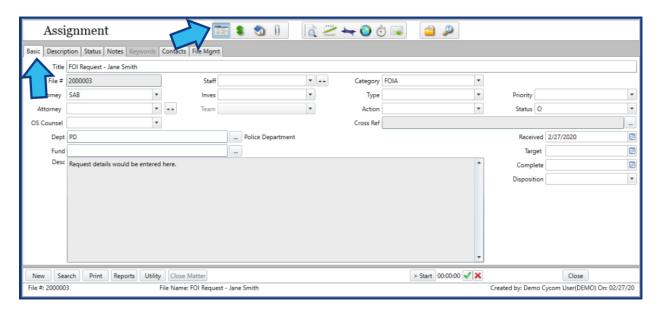


Once you've entered the data into the fields, select the **Save** button in the lower right corner.





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



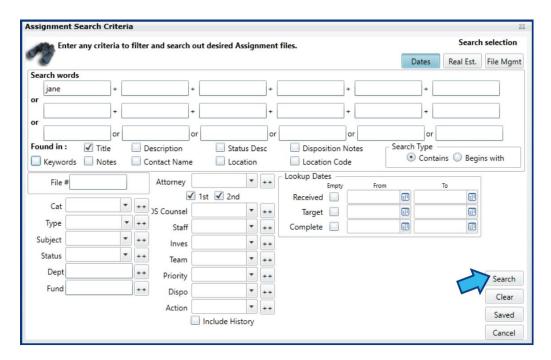
Find an Assignments Matter

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

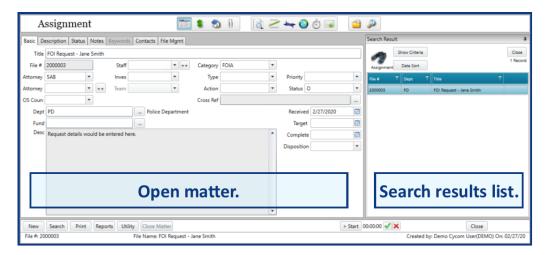




A **Search Criteria** window will appear allowing you to enter or select options to filter your search. Enter any information you know to locate the matter. Select **Search** to return the results.



Assuming your selected **Search Criteria** finds at least one match, a **Search Result** window will appear on the right side of the **Assignments** 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.

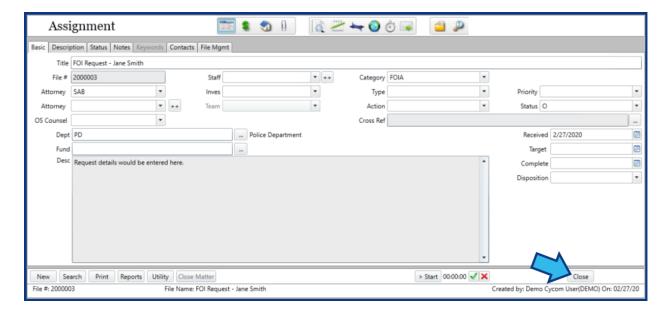




Close an Assignments Matter

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.

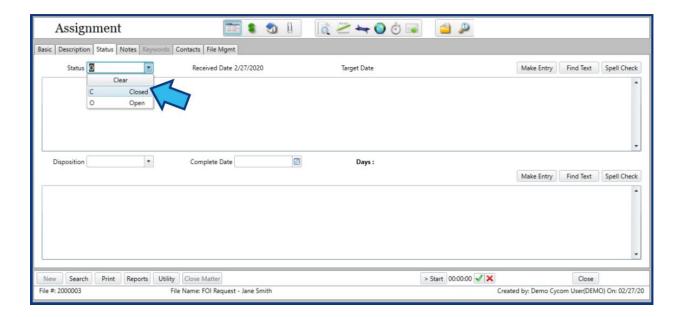
To close an **Assignments** matter to continue with other work, you can simply open another **Assignments** matter. Or you can also close the **Assignments** module using the **Close** button in the bottom right corner.



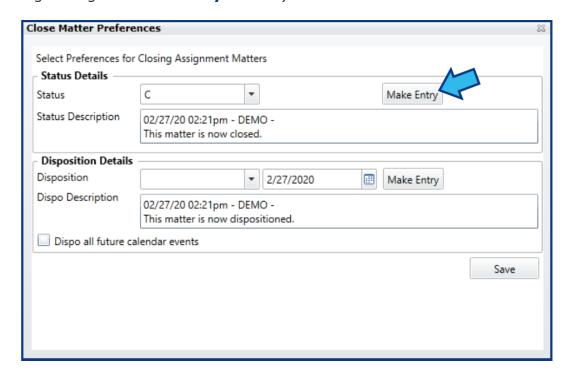
To dispose an **Assignments** matter, select the **Status** tab in the **Basic Matter Data** view.

You can dispose an **Assignment** while also setting the matter's status to a closed type. To dispose an **Assignment** in this way, select a closed status type in the **Status** field. You might only have one closed status named **Closed**. Or you might have multiple closed statuses to choose from.



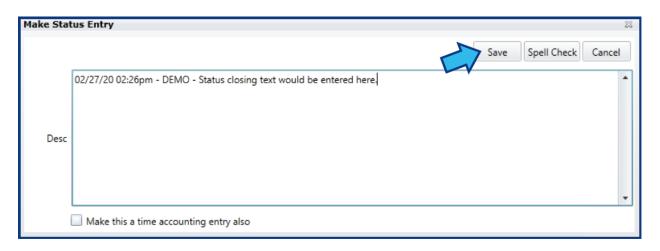


On selecting any closed type status, a **Close Matter Preferences** window will appear. By default, the **Status** will be marked with the closed status you chose, and the **Status Description** may be populated with a message. Select **Make Entry** to add any additional closing status text desired.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

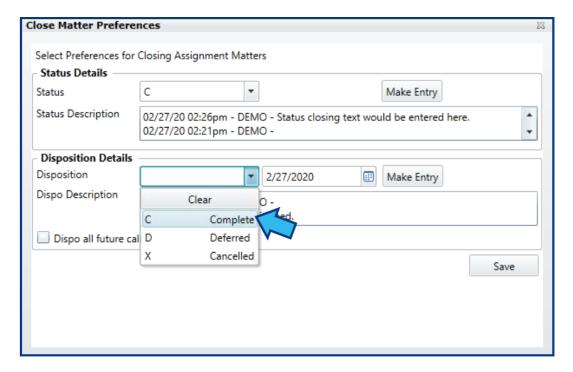




A **Make Status Entry** window appears. Today's date, time, and the **User ID** (typically the user's initials) are filled in. Enter any additional status closing text. Select **Save**.



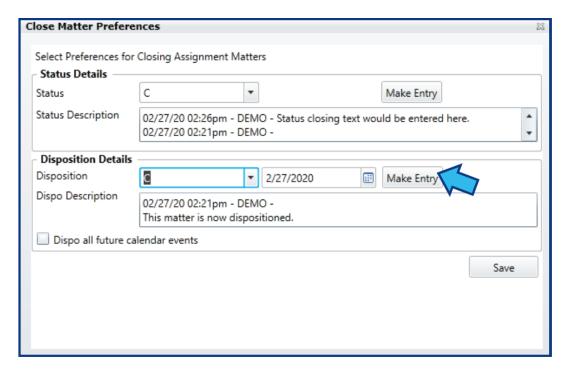
Select a **Disposition** type from the drop-down.



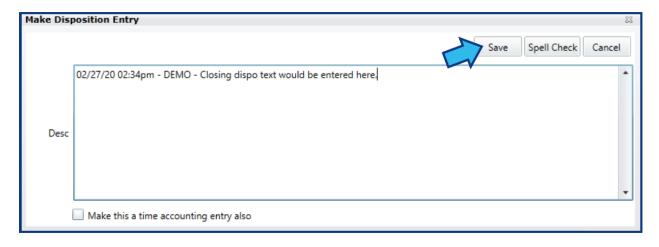
The **Disposition Date** will show today's date, and the **Dispo Description** may be populated with a message. Select **Make Entry** to add any additional closing dispo



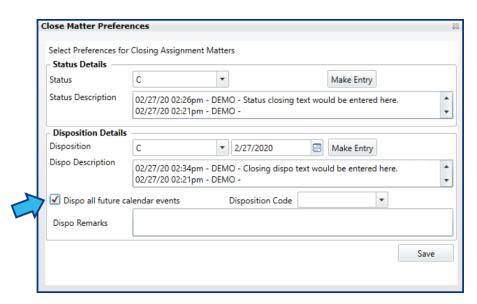
text desired. (NOTE: You can enter or edit text directly in the **Dispo Description** box, but **CLW Best Practices** encourage using the **Make Entry** button.)



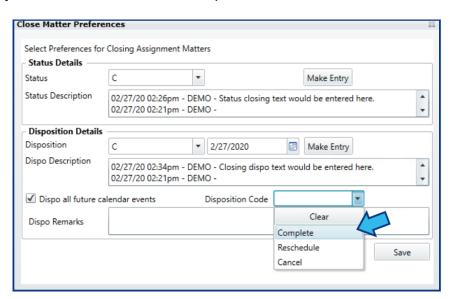
A **Make Disposition Entry** window appears. Today's date, time, and the **User ID** (typically the user's initials) are filled in. Enter any information regarding the disposition of the matter. Select **Save**.



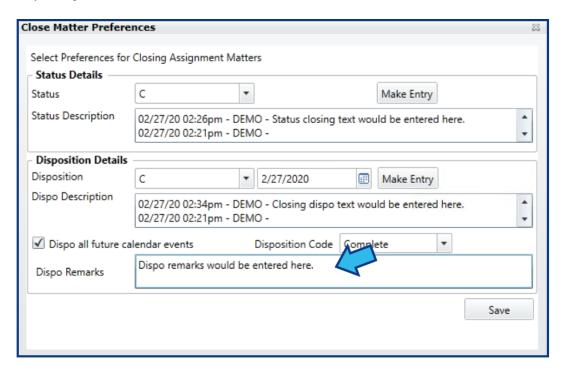
If you wish for all future calendar events that may remain on the matter to be disposed, make sure a check is placed in the box **Dispo all future calendar events**. On checking this box, a **Disposition Code** and **Dispo Remarks** field appears.



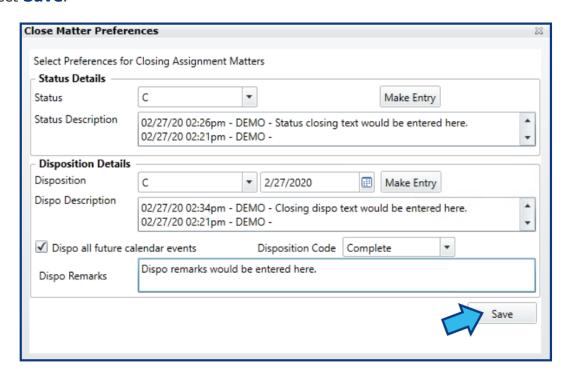
Select a **Disposition Code** from the drop-down.



Enter any **Dispo Remarks**.

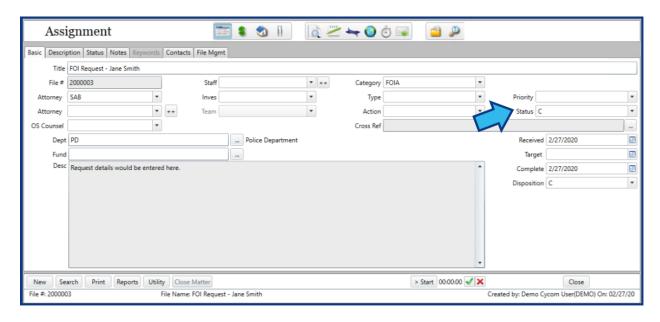


Select Save.





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**.



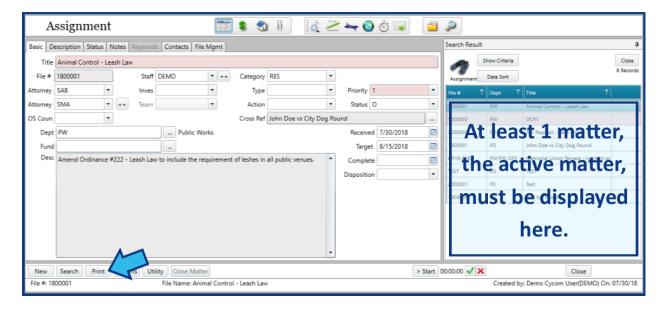


Assignments Report Options

- Print Customized Assignments Reports
- Create Built-in Assignments Reports

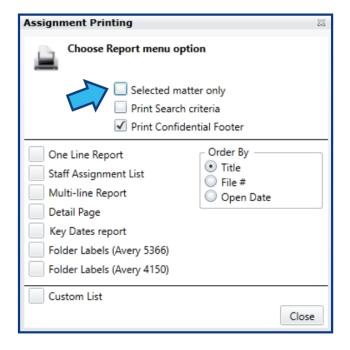
Print Customized Assignments Reports

Customized reports can be created by first executing a **Search** to find the **Assignments** 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.

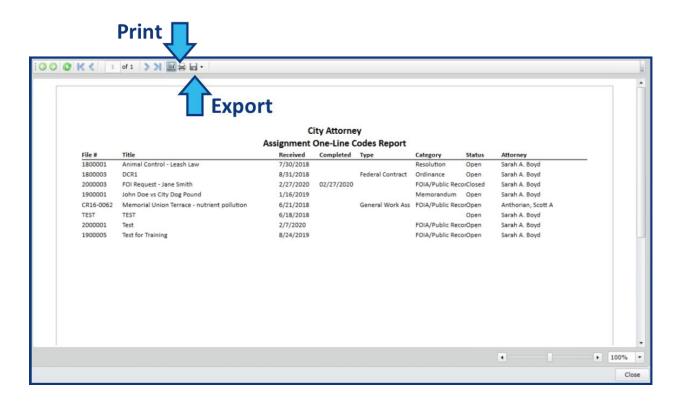


If you want to create a report for only the active matter, be sure to check the box for **Selected matter only**. If this box is unchecked, any report will include all the matters listed in the **Search Results**.



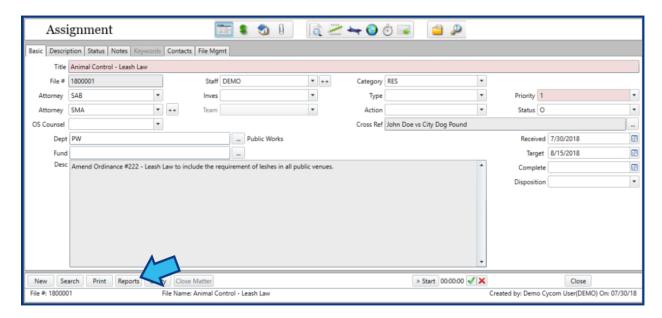


Select the type of report you'd like to generate. Some reports allow additional options and you will be prompted to make your selections. Your report will be displayed with options to print or export.

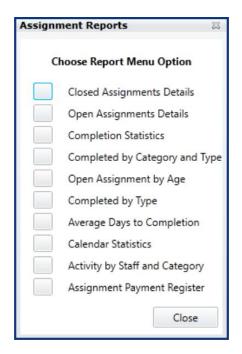


Create Built-in Assignments Reports

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



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

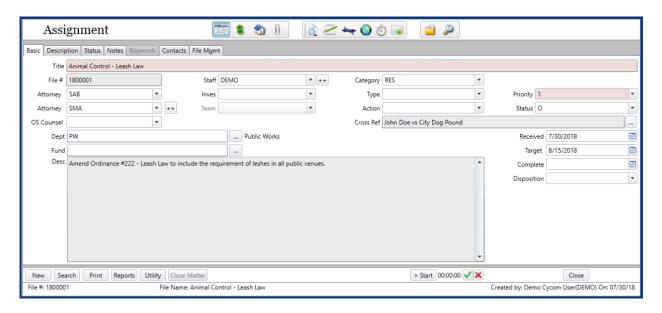




Assignments Basic Matter Data Fields

- Basic Tab
- <u>Description Tab</u>
- Status Tab
- Notes Tab
- Keywords Tab
- Contacts Tab
- File Management Tab

Basic Tab



Title

A descriptive title for the matter.



File

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

OS Counsel

Outside counsel assigned to this matter.

Department

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

Fund

The funding source for this matter.

Description

A text field to enter a description of the matter.

Staff

Any staff assigned to assist with this matter.

Investigator

The investigator assigned to this matter.

Team

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



Category

Category codes separate **Assignments** matters into classifications relevant to your office. Some examples of categories are FOIA Requests, Memorandums, and Opinions.

Type

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

Action

The next action needed on the matter is selected for this field.

Cross Reference

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

Priority

The priority of the matter is entered in this field. Priority determines the color coding applied to the matter in search results.

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.

Received Date

The date the matter was received.

Target Date

The target completion date for the matter.

Complete Date

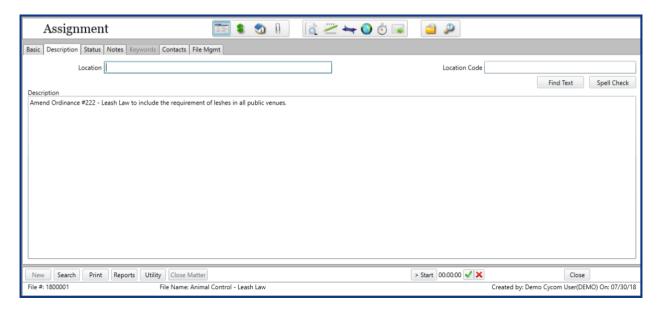
The date the matter was completed.



Disposition

The manner in which the matter was disposed is entered in this field.

Description Tab



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.

Find Text

An action button that opens a text search tool.

Spell Check

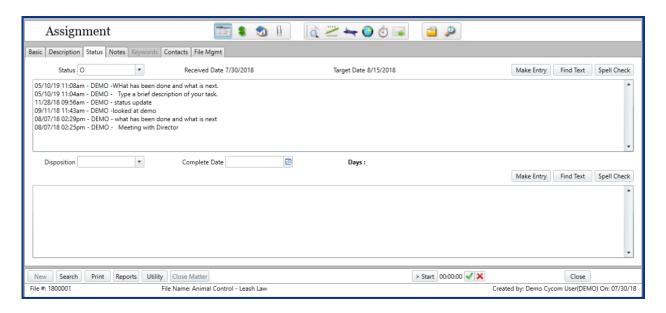
An action button that opens a spell-checking tool.



Description

An unlimited text field to enter the matter description and/or any additional details of the matter. The description contents are also displayed on the **Basic** tab, but must be edited through the **Description** tab.

Status Tab



Status

The matter's current status is entered in this field. Status types are either open or closed. Entering a closed type status will open a **Close Matter Preferences** window to allow you to enter **Disposition** information.

Make Entry

An action button that opens the **Make Status Entry** window.

Find Text

An action button that opens a text search tool.

Spell Check

An action button that opens a spell-checking tool.



Status Description

All status entries will be listed in this field. (NOTE: You can enter or edit text directly in the **Status Description** box, but **CLW Best Practices** encourage using the **Make Entry** button.)

Disposition

The matter's disposition type is entered in this field.

Complete Date

The date the matter was disposed.

Make Entry

An action button that opens the **Make Disposition Entry** window.

Find Text

An action button that opens a text search tool.

Spell Check

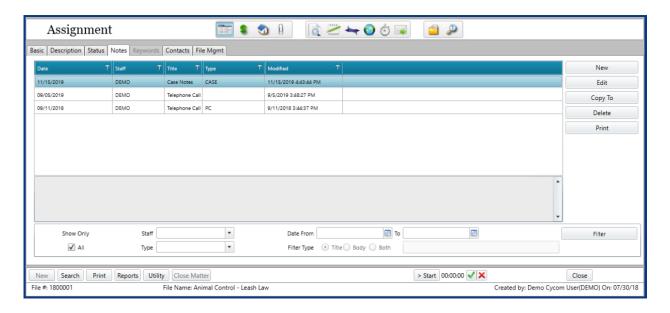
An action button that opens a spell-checking tool.

Disposition Description

All disposition entries will be listed in this field. (NOTE: You can enter or edit text directly in the **Disposition Description** box, but **CLW Best Practices** encourage using the **Make Entry** button.)



Notes Tab



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

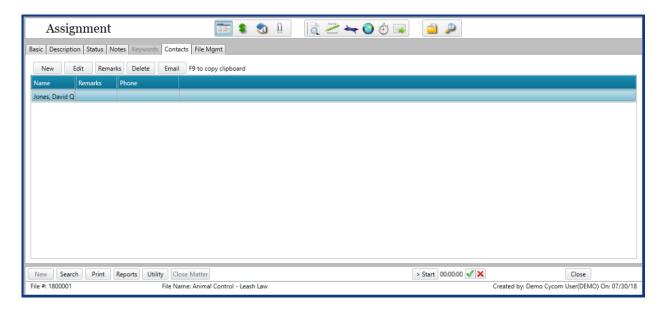
An action button to filter the note list according to the parameters selected or entered. NOTE: To filter the notes list, uncheck the **Show Only All** box.

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.



Contacts Tab



New

An action button that opens the **Find a Person** tool to create a new contact.

Edit

An action button that opens the **Edit Party** tool to edit a contact.

Remarks

An action button that opens the **Remarks** tool to add a remark.

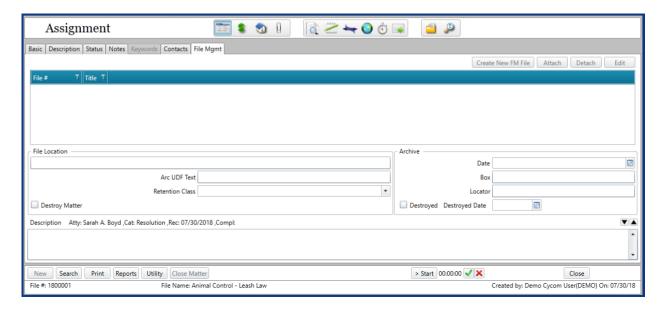
Delete

An action button that deletes the selected note.

Email

An action button that opens an email draft populated with the contact's email address, if one is included in the person's contact record.

File Management Tab



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.