



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**.

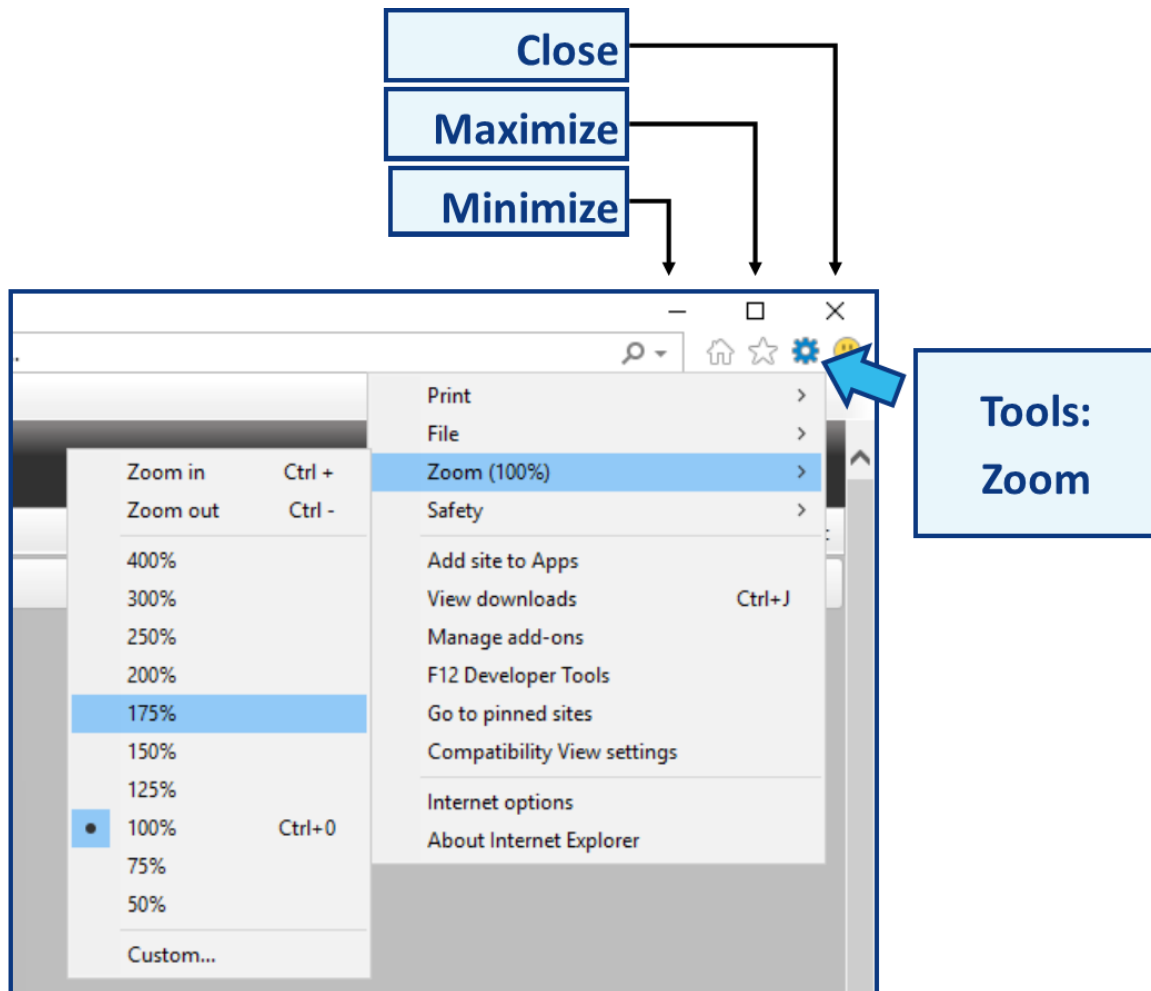
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Web Version Introduction

Zoom and Resize

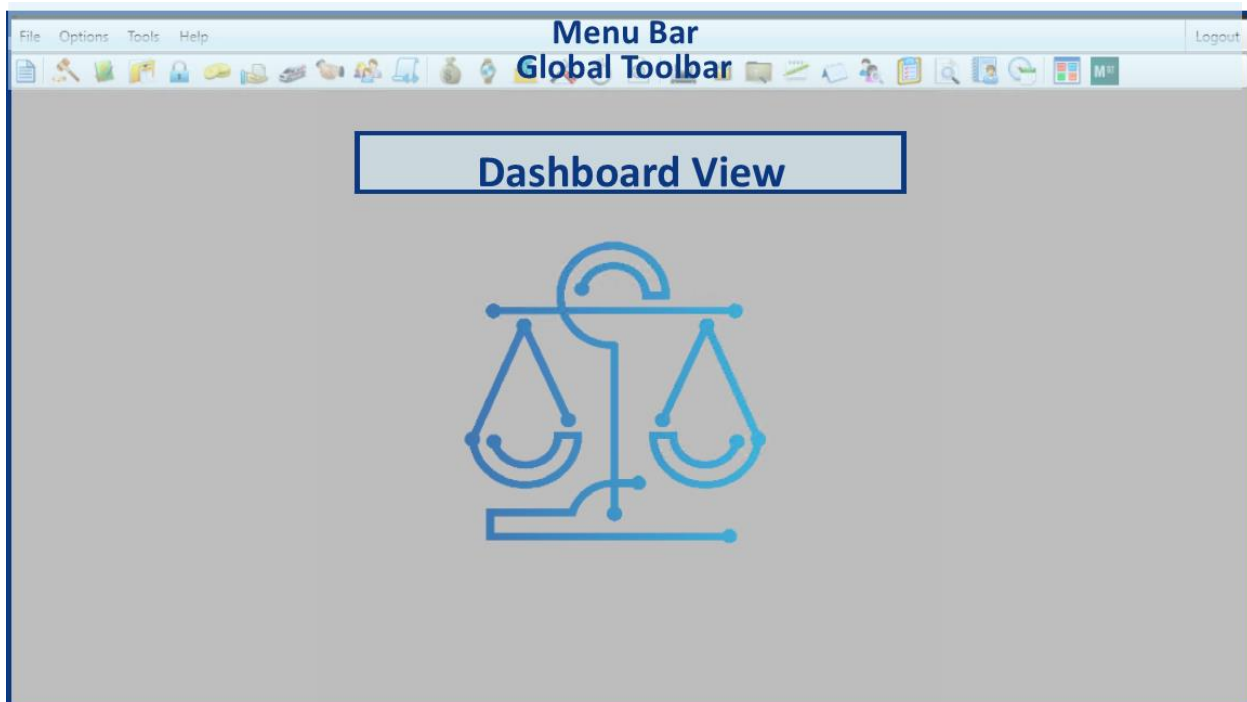
Everything in **CLW** happens in one **Internet Explorer (IE)** browser window tab. Use the tools you already know to minimize, maximize, close, resize, zoom in, and zoom out of web pages.



General Layout

CLW is comprised of three main sections which are visible unless you are viewing a report. They are the **Menu Bar**, the **Global Toolbar**, and the **Dashboard View**.

All global actions are accessible in the **Menu Bar** and/or on the **Global Toolbar**. The **Dashboard View** will change depending on default settings and selections chosen.



For more information about the general layout, check out the following article:
[**General Layout of CityLaw / CountyLaw**](#)

Customizing the Dashboard

The **Dashboard** default view can be changed and customized. By default, **Skyline View** is set as the default view.

Set the **Dashboard** default view by doing the following:

- Select **Tools** in the **Menu Bar** and select **My Preferences**.
- In the **My Preferences** window, select **Initial View**.
- Select a default view and press **OK**.

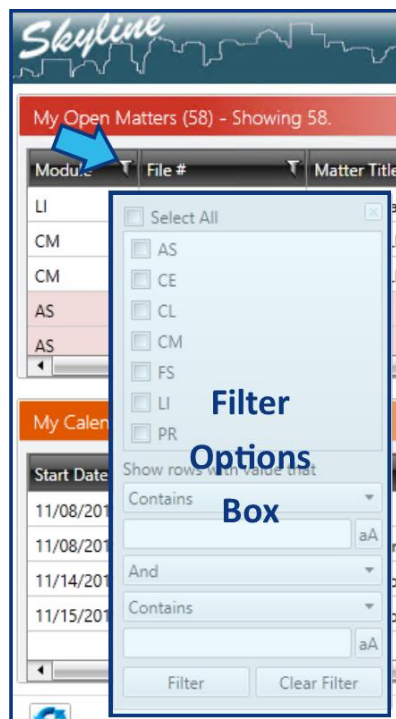
For more detailed instructions of this process, check out the following article: [Set Default View](#)

Table Sorting and Filters

All tables, or grid boxes, in **CLW** offer the ability to sort and/or filter contents to help you find what you need quickly. Left-clicking a table column heading will sort the list first in ascending order, then descending order, and finally, in default order for that table column.

Filters, where available, allow additional sorting options. Set table filter options for a column by doing the following:

- Press the **Filter** icon on the column heading.
- In the **Filter Options** box that appears, select or enter your filter options.
- Press **Filter**.



Modules and Matters

Entering Data

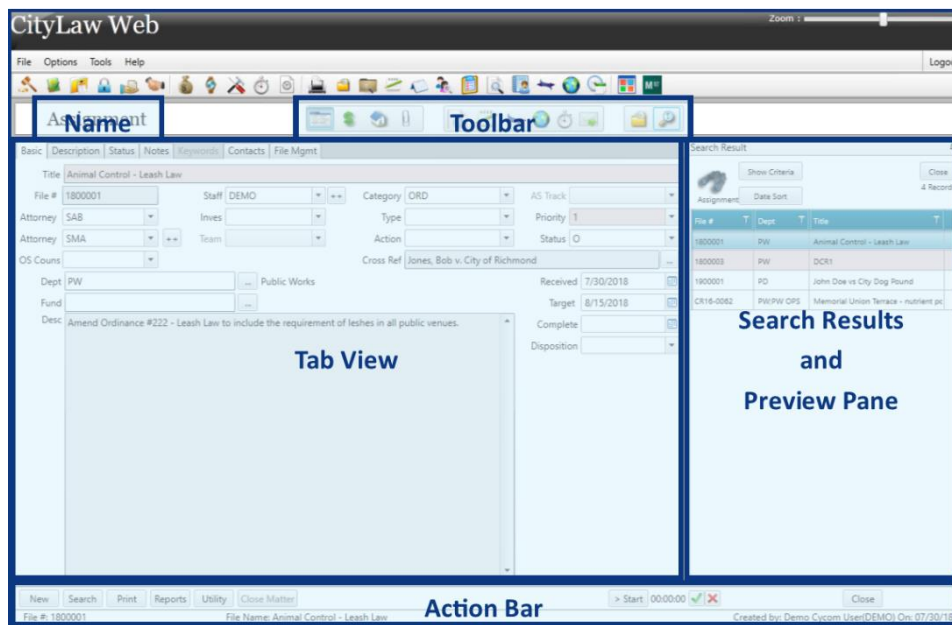
In addition to standard data entry fields such as text, drop-downs, and dates, **CLW** has some drop-down fields that allow multiple selections, denoted with a button to the right of the drop-down arrow labelled with “++”. **CLW** also has search selection fields that allow you to search for the option from a list, denoted with a button to the right of the entry field labelled with “...”.

Some fields are freely editable. Others, such as **Notes**, may require being selected first and then pressing an **Edit** button. A few fields, such as **File Number**, are only editable by users with specific security profiles and/or passwords.

For more detailed information about data entry, check out the following article: [**Navigation and Data Entry Tips**](#)

General Module Layout

Standard modules in **CLW** follow the same layout. They include the following sections: **Module Name**, **Module Toolbar**, **Tab View**, **Search Results and Preview Pane**, and **Module Action Bar**.



For detailed information about the general layout of the standard modules, such as **Litigation**, **Assignments**, **Claims**, etc., check out the following article: [General Layout of Modules](#)

Creating New Matters

New matters are created by first selecting the correct module and then pressing **New** in the **Module Action Bar**. Each module may have subtle differences, but the process is mostly the same. A prompt for allowing **Auto-Numbering** or entering a **File Number** manually appears. Then basic matter data fields are entered.

For detailed information on creating new matters, check out the following articles:

- [Create New Assignment Matter](#)
- [Create New Claims Matter](#)
- [Create New Litigation Matter](#)

Module Tabs

Selecting some items in the **Module Toolbar** changes the tabs available in the **Tab View**. Every module, except for **Time Accounting**, **Billing and Accounts Receivable**, and **System Management**, has a **Basic Matter Data** tab view. The **Basic Matter Data** tab view is also the default view when a matter is first created or whenever the matter is opened from outside the module.

For a description of some of the **Assignment** module **Basic Matter Data** tabs, check out the following article: [Assignment matter screens](#)

Module Toolbar

The **Module Toolbar** has icons for the various module **Tab Views**, including **Basic Matter Data** and **Attachments**. It also has icons for displaying the matter calendar, your open matters, and the search criteria.

Module Action Bar

Action buttons for each standard module can be found at the bottom on the **Action Bar**. This is where you will find the **New** button to create new matters. It is also where you will find the **Print** and **Report** buttons to display customized and built-in reports.

Searching for Matters

There are several ways to search for matters. The **Global Matter Search**, which is found on the **Global Toolbar**, will search through all modules and matters to which you have at least read access according to the search criteria you specify.

Each module has a **Search** button that will search for all matters within that module to which you have at least read access according to the search criteria you specify.

You can find all your matters across all modules by selecting the **My Open Files** icon from the **Global Toolbar**. You can find all your matters within a specific module by selecting **Show My Open Files** on a **Module Toolbar**.

For detailed instructions on searching for a matter, check out the following article: [**Find a Matter**](#)

Attaching Files to Matters

Importing Files and Folders

Any type of allowable file or any folder containing allowable file types may be imported into a matter in **CLW**. Almost all file types are allowable. Applications, such as those that end with the file extension, **.exe**, are not allowed. All other documents, images, audio, or video file types can be imported successfully.

Folders can be imported using the **Import Folder** button on the **Documents** tab of the **Attachments** tab view (the paperclip). Files can be imported using the **Import Files** button on the **Documents** tab of the **Attachments** tab view (the paperclip).

For detailed instructions on importing a folder from your **Desktop**, check out the following article: [Import a Folder from Desktop](#)

Importing Using CyImportFile Tool

Any file on your **Desktop** can be dragged onto the **CyImportFile** icon to be directly imported into **CLW**. This is only available if the **CyImportFile** icon has been added to your **Desktop**.

For instructions to add the **CyImportFile Tool** to your **Desktop**, check out the following article: [Add CyImportFile Icon to Desktop](#)

Importing Using Send To Option

Any file on your computer can be imported into **CLW** by using the **Send To** option by right-clicking the file and selecting **Send To** and then selecting the **CLW Import** option. This is only available if **CLW** has been added to your **Send To Menu**.

For instructions to add **CLW** to your **Send To** options, check out the following article: [Add CityLaw / CountyLaw to Send To Menu](#)

Importing Using Outlook Add-In

Email can be imported to **CLW** if you have the **Cycom Email Exporter Plus** add-in for **Outlook**. If you do, you will see a **CLW** tab in the **Menu Bar** at the top of **Outlook**.

For instructions for importing an email and/or email attachment from **Outlook** to **CLW**, check out the following articles:

- [**Save Email\(s\) to Matter**](#)
- [**Save Email Attachment\(s\) to Matter**](#)

Creating New Documents from Templates

New documents can be created from templates. Each user has access to **System** and **Personal** templates that are stored on a shared drive.

To create a new document, from the **Documents** tab of the **Attachments** tab view, press **New** and then select the template. Templates are module specific, so you will likely need to first select the folder for the module and then select the template inside that module. Some exceptions exist, but such practice is discouraged.

Support Contact Information

Cycom Support can be reached in the following ways:

- Phone call to **888-292-6688**
- Email to [**support@cycominc.com**](mailto:support@cycominc.com)

Email is usually the quickest way to reach support. Many questions or issues can be addressed even when we are assisting other clients.

When contacting support, please include the following:

- Your name and site (City, Division (if applicable), and State)
- The question or issue
- Details relevant to the question or issue
 - These might include the following:
 - Module(s) involved
 - Actions you have attempted and results
 - Tab(s) involved
 - Report(s) involved
 - If an issue has occurred, these are helpful:
 - When did it occur?
 - Was this working correctly previously?
 - Is it happening for one user or many?
 - Are there error messages? (Screenshots or exact wording are very helpful)