

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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## Labor Relations Basic Actions

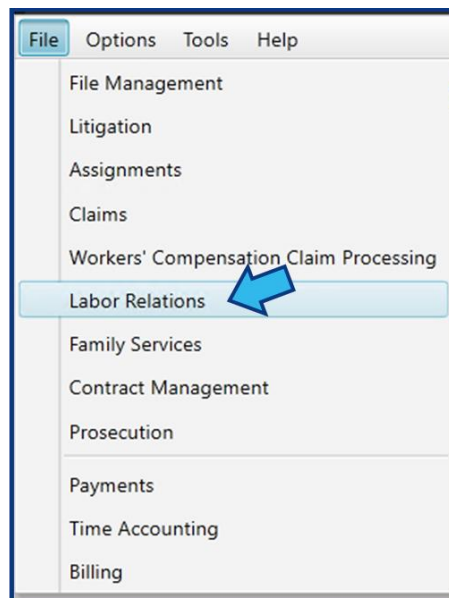
- [Open the Labor Relations Module](#)
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### Open the Labor Relations Module

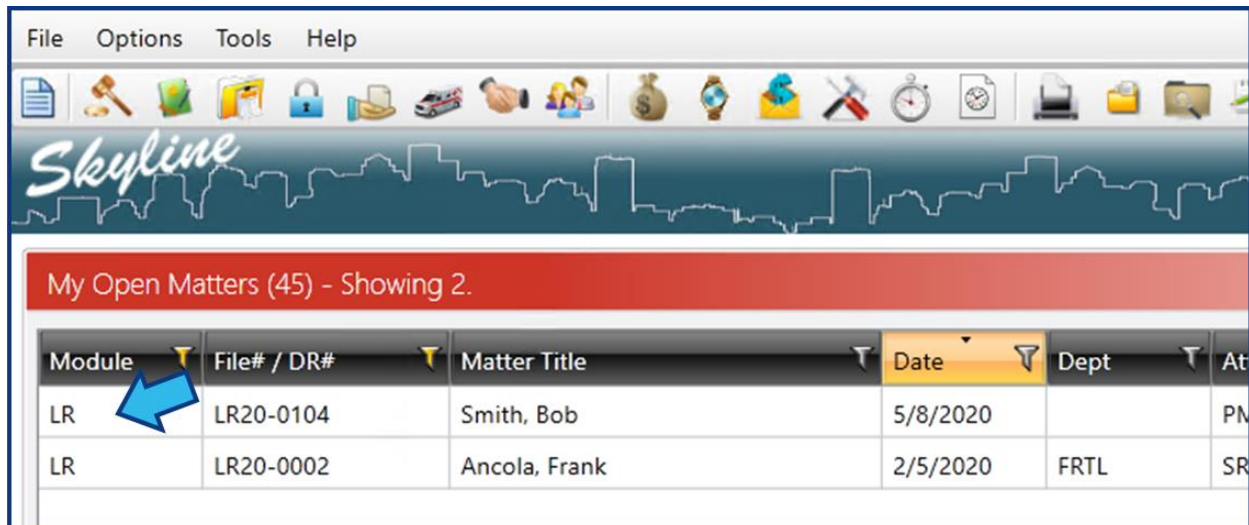
The **Labor Relations** module can be opened by selecting the **Labor Relations** icon from the **Global Toolbar**.



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

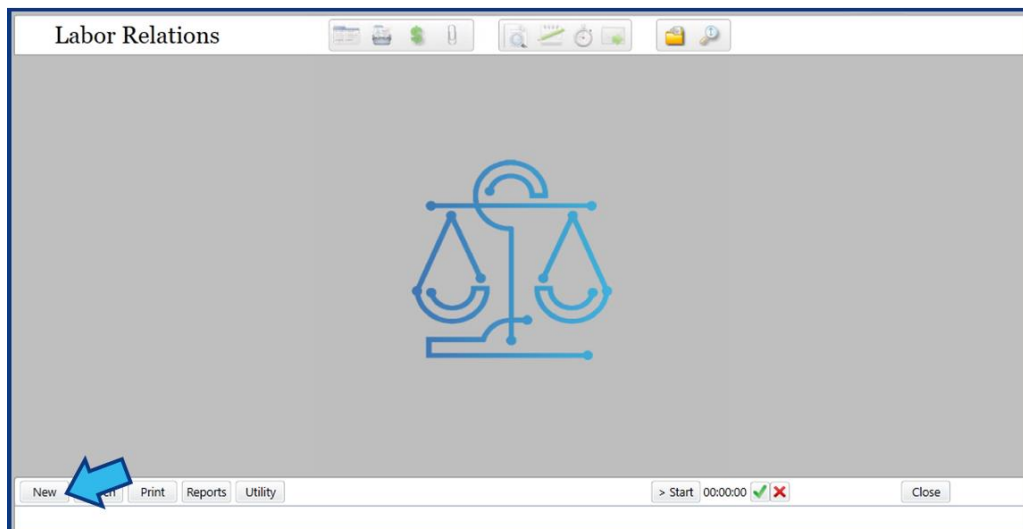


Finally, it can be opened by opening a **Labor Relations** matter. For example, if a **Labor Relations** matter is in the **My Open Matters** display in the **Skyline** view, then double-clicking on that matter will open the **Labor Relations** module.

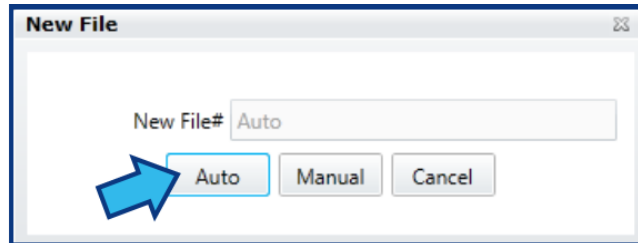


### Create a New Labor Relations Matter

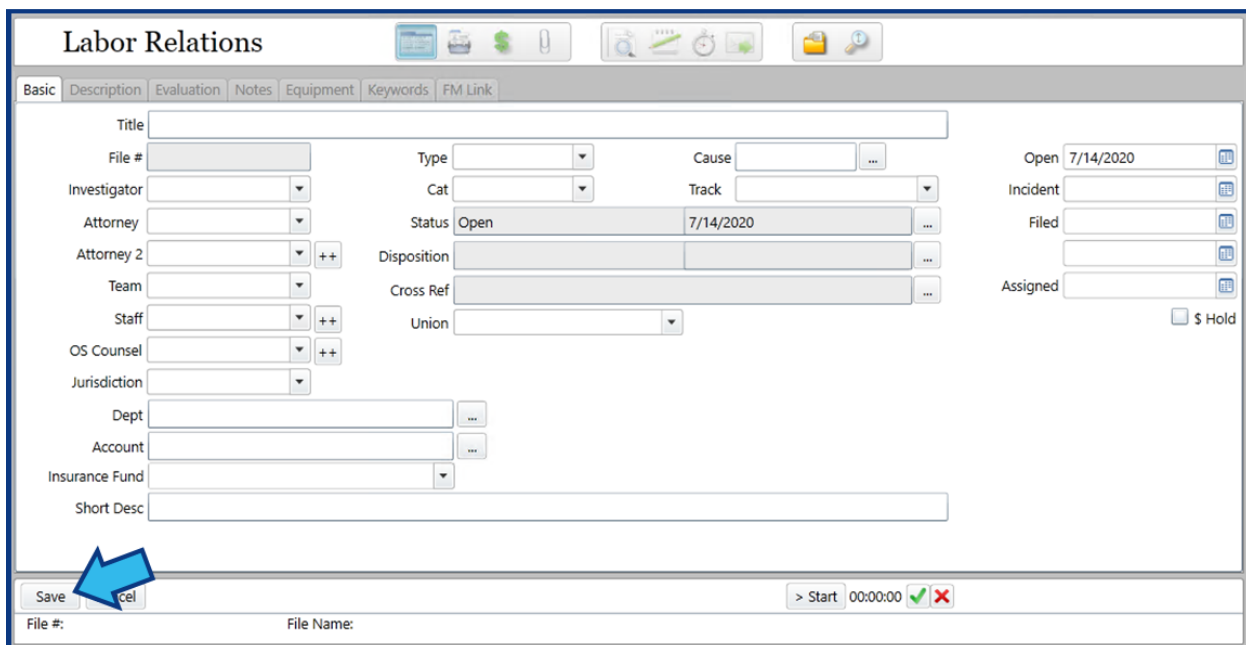
To create a new **Labor Relations** matter, open the **Labor Relations** module and select the **New** button on the action bar at the bottom.



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.

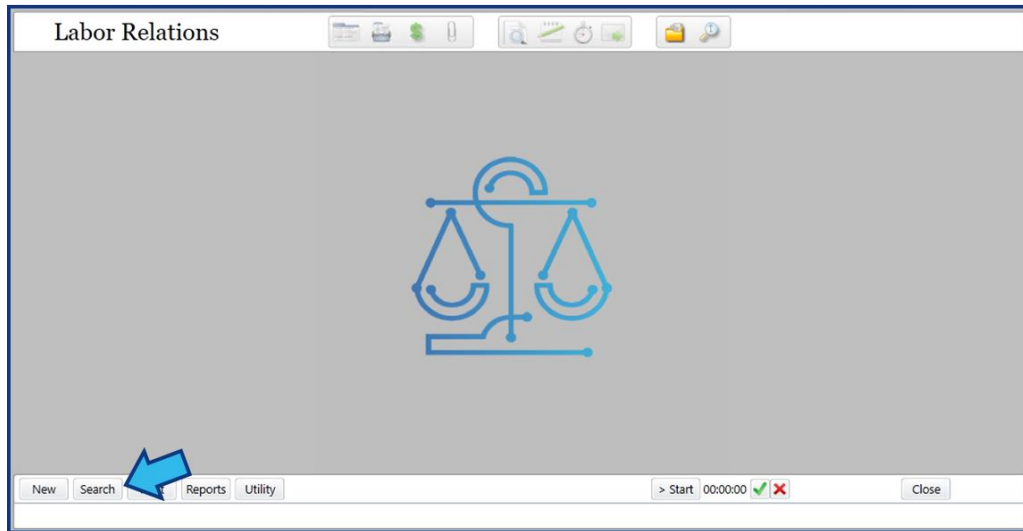


Enter the matter information into the **Basic** tab fields. The matter may automatically be saved when the information is added. If not, select **Save** in the lower left corner to save the matter and make the other tabs selectable.

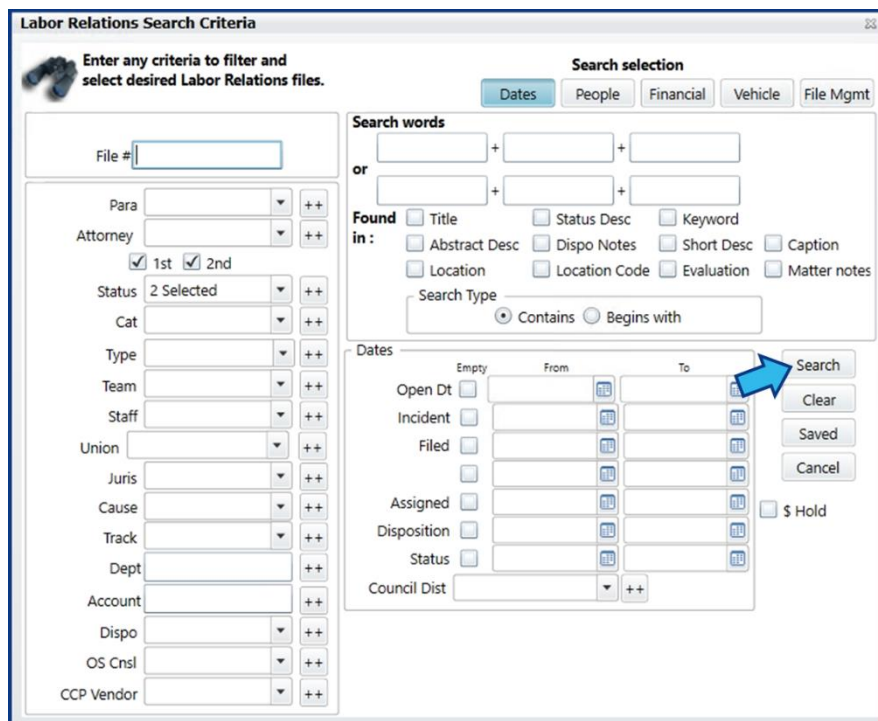


**Find a Labor Relations Matter**

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

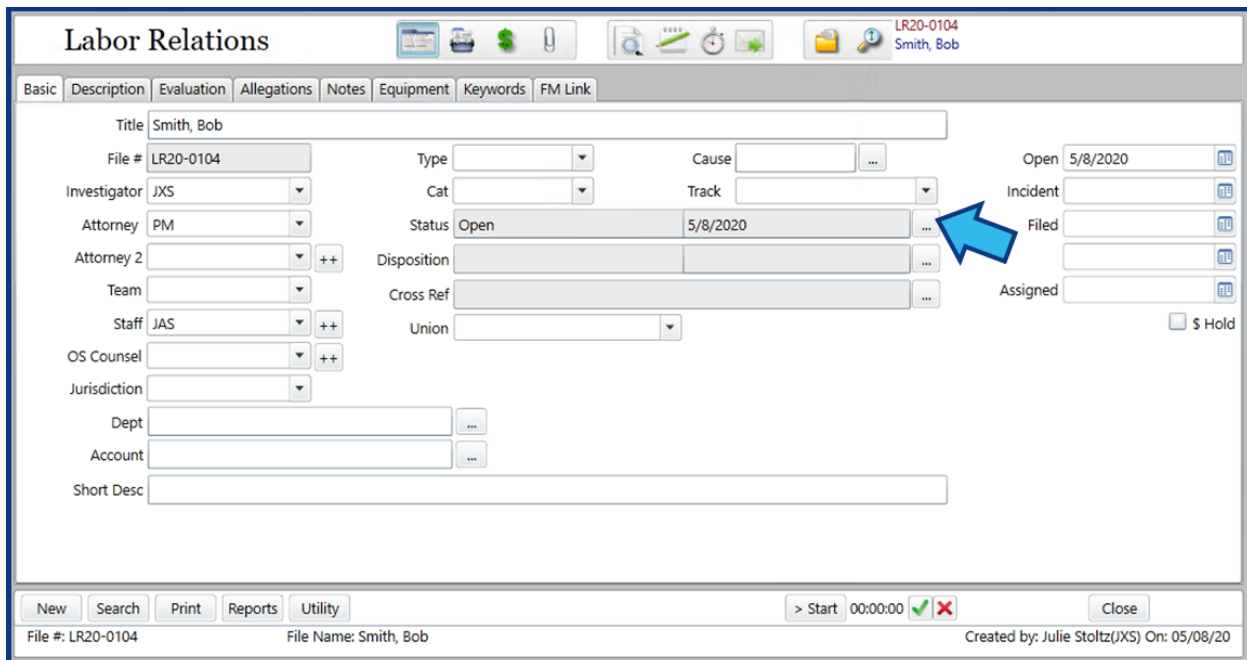


A **Search Criteria** window will appear allowing you to enter or select options to filter your search. Enter any information you know to locate the matter. Select **Search** to return the results.



## Close a Labor Relations Matter

To close a **Labor Relations** matter, first open the matter and select the ellipsis button to the right of the **Status** field.



**Labor Relations** LR20-0104  
Smith, Bob

Basic | Description | Evaluation | Allegations | Notes | Equipment | Keywords | FM Link

Title: Smith, Bob

File #: LR20-0104    Type: [v]    Cause: [v]    Open: 5/8/2020

Investigator: JXS    Cat: [v]    Track: [v]    Incident: [v]

Attorney: PM    Status: Open 5/8/2020    **...**    Filed: [v]

Attorney 2: [v] ++    Disposition: [v]    Assigned: [v]

Team: [v]    Cross Ref: [v]    \$ Hold:

Staff: JAS    Union: [v]

OS Counsel: [v] ++

Jurisdiction: [v]

Dept: [v] ...

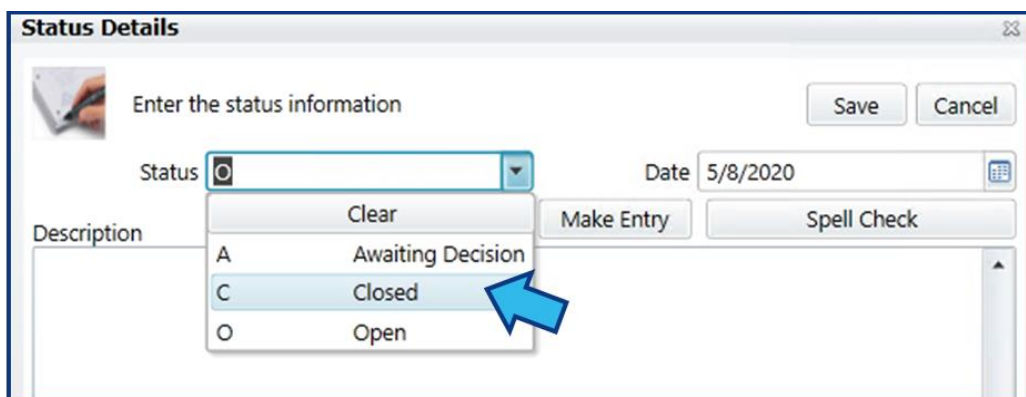
Account: [v] ...

Short Desc: [v]

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

File #: LR20-0104    File Name: Smith, Bob    Created by: Julie Stoltz(JXS) On: 05/08/20

Next, in the **Status Details** window, change **Status** to **Closed**, or if you have more than one **Closed** state, select the appropriate one.



**Status Details** [x]

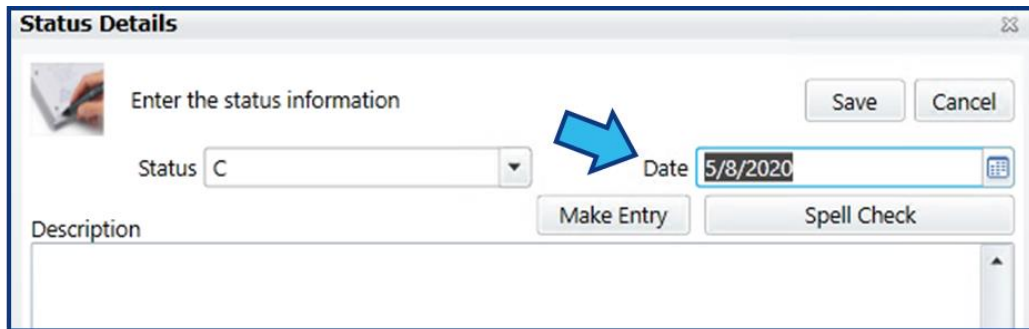
Enter the status information    Save    Cancel

Status: [v]    Date: 5/8/2020

Description: [v]    Make Entry    Spell Check

- Clear
- A Awaiting Decision
- C Closed**
- O Open

Enter the closing date in the **Date** field.



**Status Details**

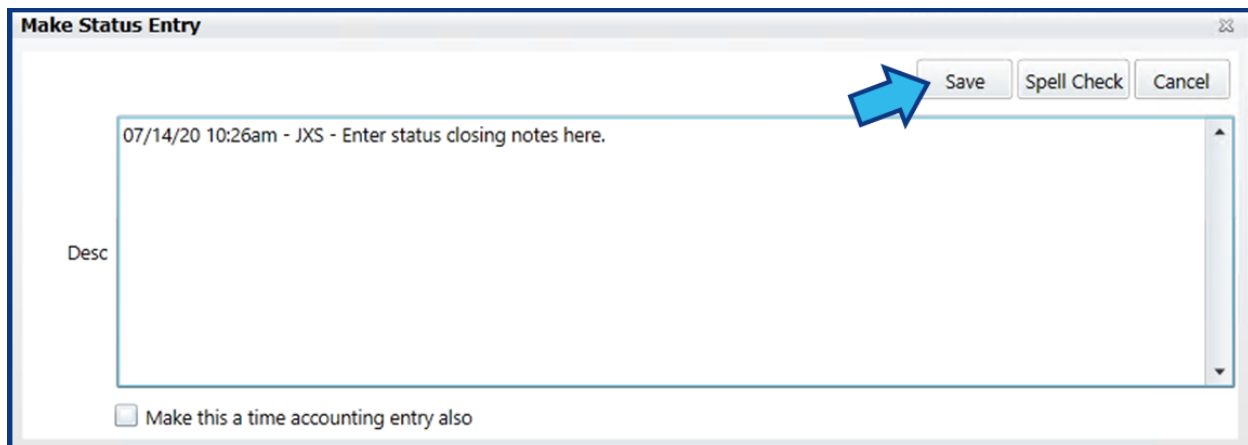
Enter the status information

Status

Date

Description

Select the **Make Entry** button to enter status closing notes according to your office's closing protocols. When finished, select **Save**.



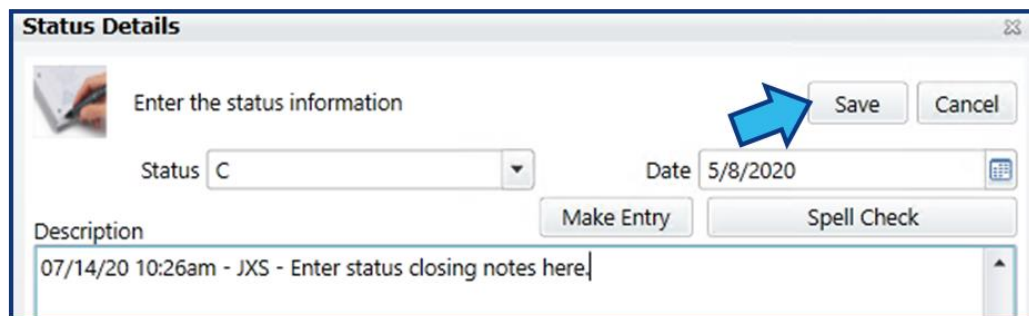
**Make Status Entry**

Desc

07/14/20 10:26am - JXS - Enter status closing notes here.

Make this a time accounting entry also

Select **Save** in the **Status Details** window to save your changes.



**Status Details**

Enter the status information

Status

Date

Description

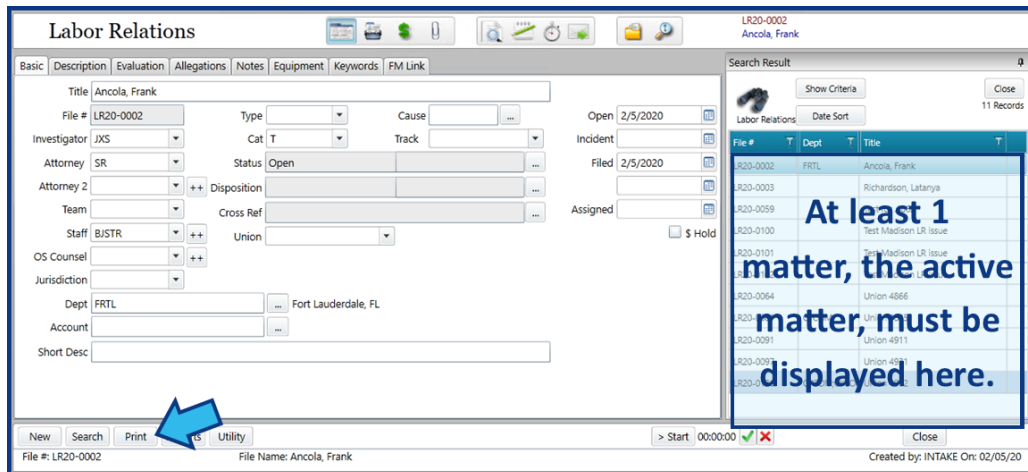
07/14/20 10:26am - JXS - Enter status closing notes here.

## Labor Relations Report Options

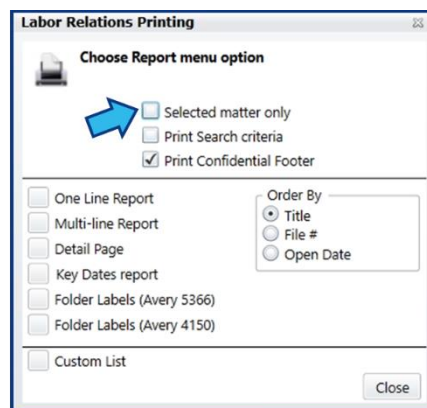
- [Print Customized Labor Relations Reports](#)

### Print Customized Labor Relations Reports

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

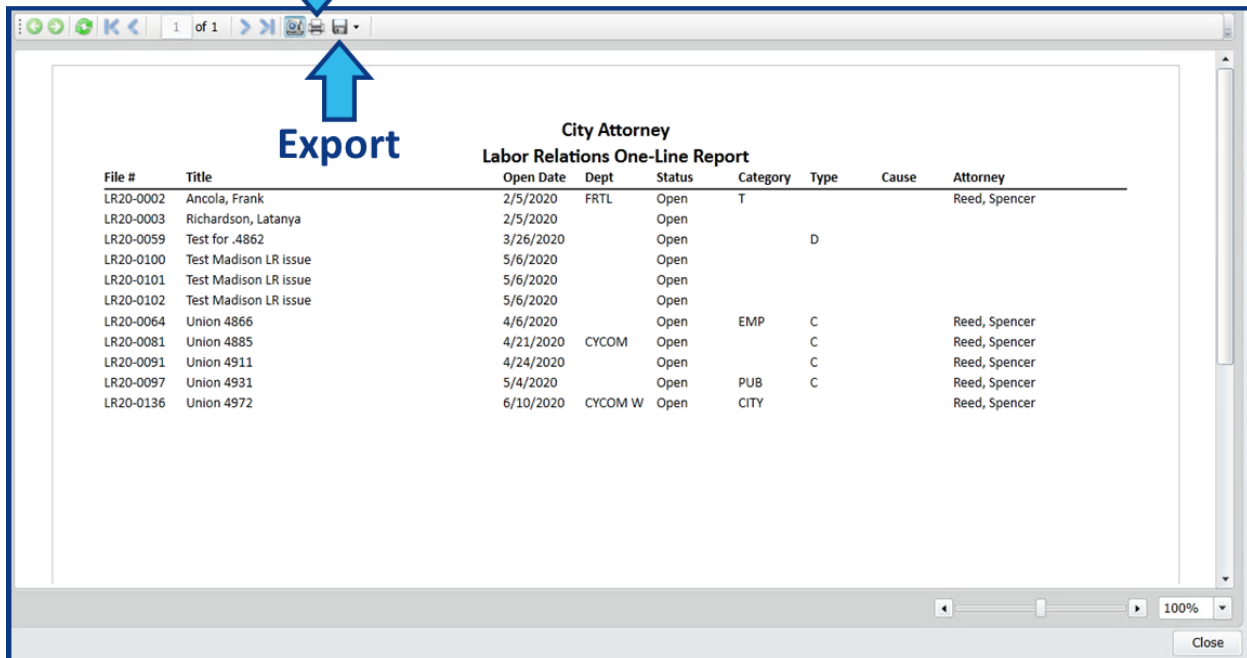


If you want to create a report for only the active matter, be sure to check the box for **Selected matter only**. If this box is unchecked, any report will include all the matters listed in the **Search Results**.



Select the type of report you would 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**

File #	Title	Open Date	Dept	Status	Category	Type	Cause	Attorney
LR20-0002	Ancola, Frank	2/5/2020	FRTL	Open	T			Reed, Spencer
LR20-0003	Richardson, Latanya	2/5/2020		Open				
LR20-0059	Test for ,4862	3/26/2020		Open		D		
LR20-0100	Test Madison LR issue	5/6/2020		Open				
LR20-0101	Test Madison LR issue	5/6/2020		Open				
LR20-0102	Test Madison LR issue	5/6/2020		Open				
LR20-0064	Union 4866	4/6/2020		Open	EMP	C		Reed, Spencer
LR20-0081	Union 4885	4/21/2020	CYCOM	Open		C		Reed, Spencer
LR20-0091	Union 4911	4/24/2020		Open		C		Reed, Spencer
LR20-0097	Union 4931	5/4/2020		Open	PUB	C		Reed, Spencer
LR20-0136	Union 4972	6/10/2020	CYCOM W	Open		CITY		Reed, Spencer

## Labor Relations Basic Matter Data Fields

- [Basic Tab](#)
- [Description Tab](#)
- [Evaluation Tab](#)
- [Allegations Tab](#)
- [Notes Tab](#)
- [Equipment Tab](#)
- [Keywords Tab](#)
- [FM Link Tab](#)

### Basic Tab

Basic	Description	Evaluation	Allegations	Notes	Equipment	Keywords	FM Link
Title <input style="width: 100%;" type="text"/>							
File #	<input type="text" value="LR19-0037"/>	Type	<input type="text"/>	Cause	<input type="text"/>	Open	<input type="text"/>
Investigator	<input type="text"/>	Cat	<input type="text"/>	Track	<input type="text"/>	Incident	<input type="text"/>
Attorney	<input type="text"/>	Status	<input type="text"/>			Filed	<input type="text"/>
Attorney 2	<input type="text"/>	Disposition	<input type="text"/>				<input type="text"/>
Team	<input type="text"/>	Cross Ref	<input type="text"/>			Assigned	<input type="text"/>
Staff	<input type="text"/>	Union	<input type="text"/>				<input type="checkbox"/> \$ Hold
OS Counsel	<input type="text"/>						
Jurisdiction	<input type="text"/>						
Dept	<input type="text"/>						
Account	<input type="text"/>						
Short Desc <input style="width: 100%;" type="text"/>							

### Title

The descriptive title for the matter.

**File #**

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

**Investigator**

The investigator assigned to this matter.

**Attorney**

The lead attorney on the matter.

**Attorney 2**

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

**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.

**Jurisdiction**

The jurisdiction for which this matter is assigned.

**Dept (Department)**

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

**Account**

The account to which expenses for this matter are applied.

**Short Desc (Description)**

A short description of the matter.

**Type**

Type codes separate matters into classifications relevant to your office.

**Cat (Category)**

Category codes separate matters into classifications relevant to your office.

**Cause**

The cause code for the matter.

**Track**

The track code for the matter.

**Status**

The current status of the matter. Status codes are classified as either open or closed types and 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 Ref (Reference)**

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

**Union (or Court)**

The union or court that will see this matter. (NOTE: A court number field may be used to further identify the court.)

**Open**

The date the matter was opened.

**Incident**

The date the matter incident occurred.

**Filed**

The date the matter was filed.

**Board**

The board date of the matter. (NOTE: In the image above the **Board** label is not shown.)

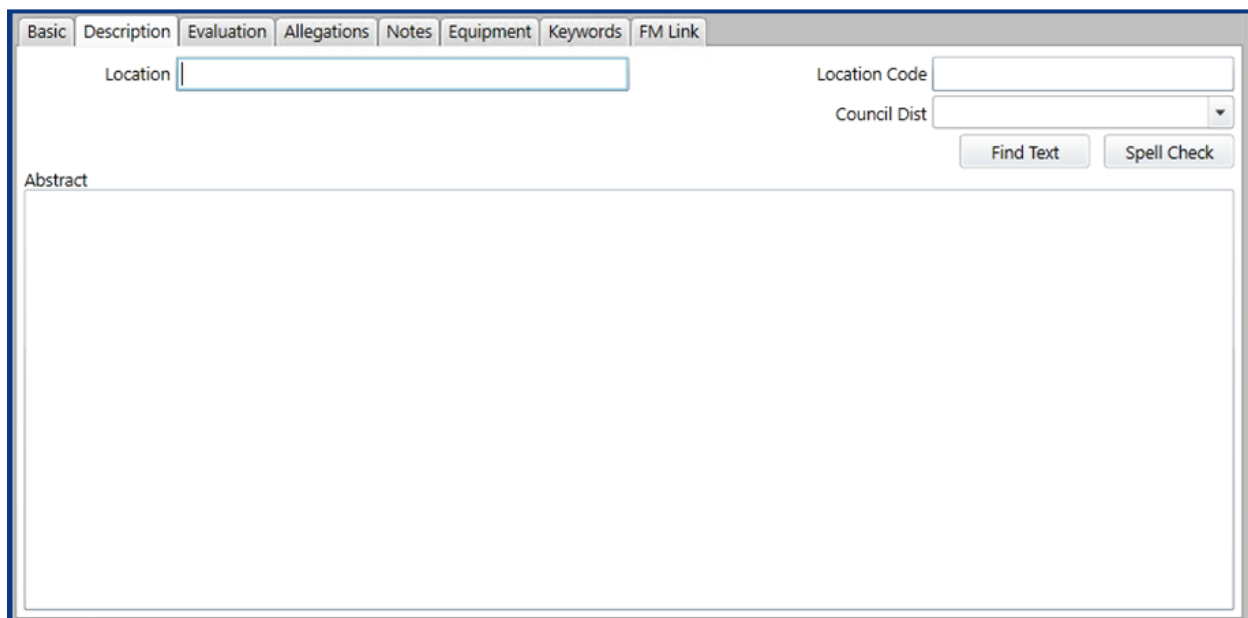
**Assigned**

The date the matter was assigned.

**Legal Hold**

A check indicates this matter has a hold applied. Editing fields is restricted when this is applied. Only a **System Administrator**, or someone with access to the admin password, can apply a hold on a matter.

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**Description Tab**

The screenshot shows a software interface with a tabbed menu at the top containing: Basic, Description, Evaluation, Allegations, Notes, Equipment, Keywords, and FM Link. The 'Description' tab is active. Below the tabs, there are two input fields: 'Location' and 'Location Code'. To the right of the 'Location Code' field is a dropdown menu labeled 'Council Dist'. Below these fields are two buttons: 'Find Text' and 'Spell Check'. A large text area labeled 'Abstract' is positioned below the buttons.

**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 (District)**

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.

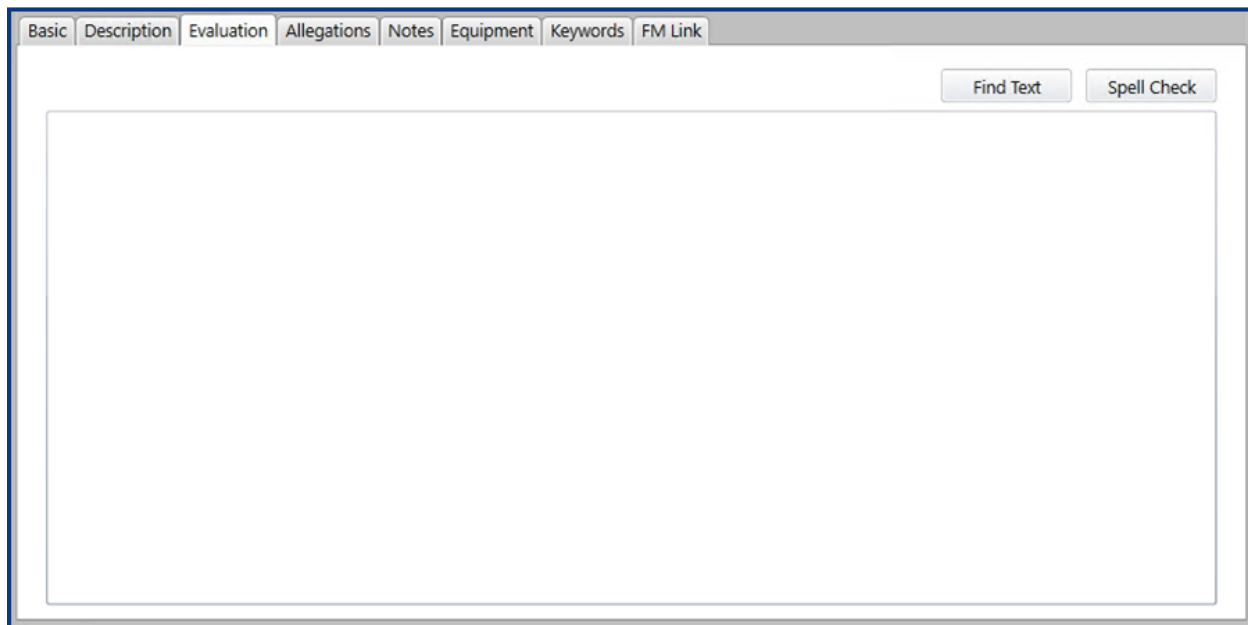
**Spell Check**

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**

The screenshot shows a software interface with a tabbed menu at the top. The tabs are labeled: Basic, Description, Evaluation, Allegations, Notes, Equipment, Keywords, and FM Link. The 'Evaluation' tab is currently selected. In the top right corner of the main content area, there are two buttons: 'Find Text' and 'Spell Check'. Below these buttons is a large, empty rectangular text field for entering evaluation details.

**Find Text**

An action button that opens a text search tool.

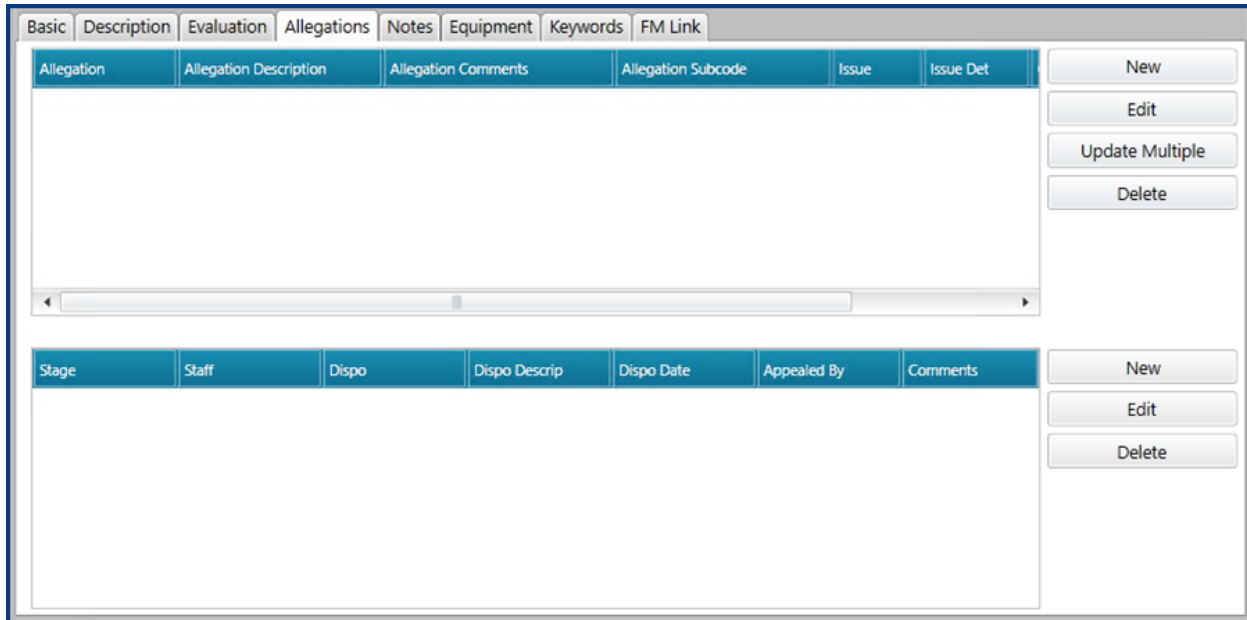
**Spell Check**

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 a software interface with a tabbed menu at the top: Basic, Description, Evaluation, Allegations (selected), Notes, Equipment, Keywords, FM Link. Below the tabs are two data tables. The top table has columns: Allegation, Allegation Description, Allegation Comments, Allegation Subcode, Issue, Issue Det. The bottom table has columns: Stage, Staff, Dispo, Dispo Descrip, Dispo Date, Appealed By, Comments. To the right of each table are action buttons: New, Edit, Update Multiple, and Delete. A horizontal scrollbar is visible between the two tables.

The **Allegations** tab contains two 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.

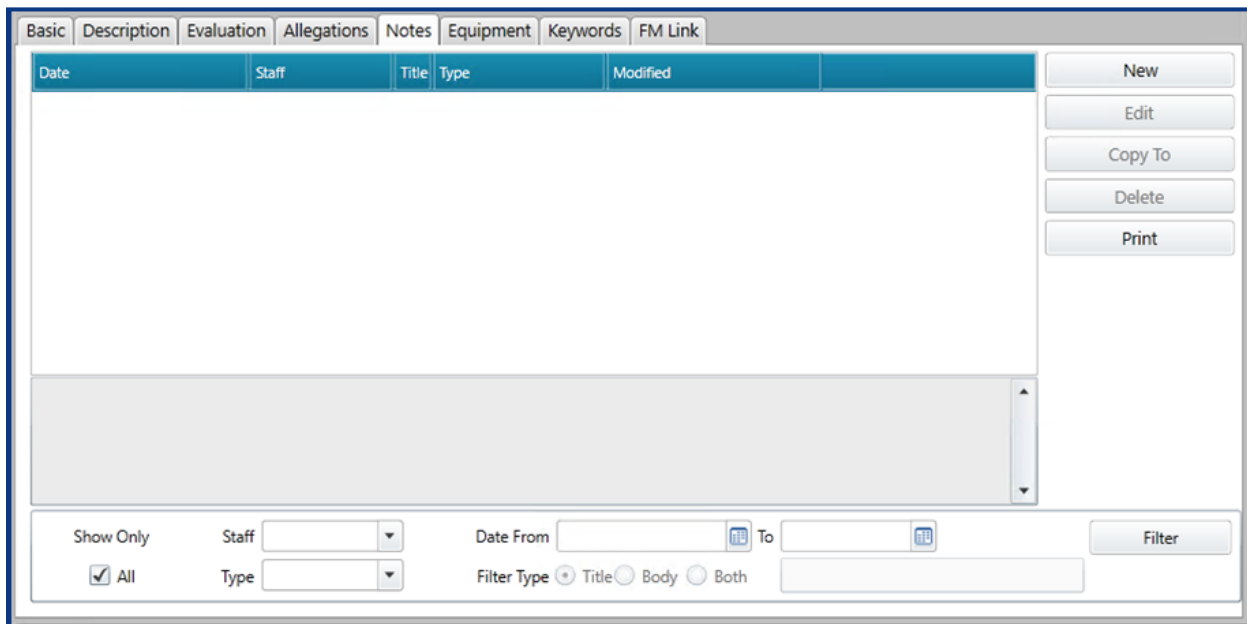
### **Edit (lower section)**

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**



Date	Staff	Title	Type	Modified
[Preview of highlighted note]				

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 would 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.

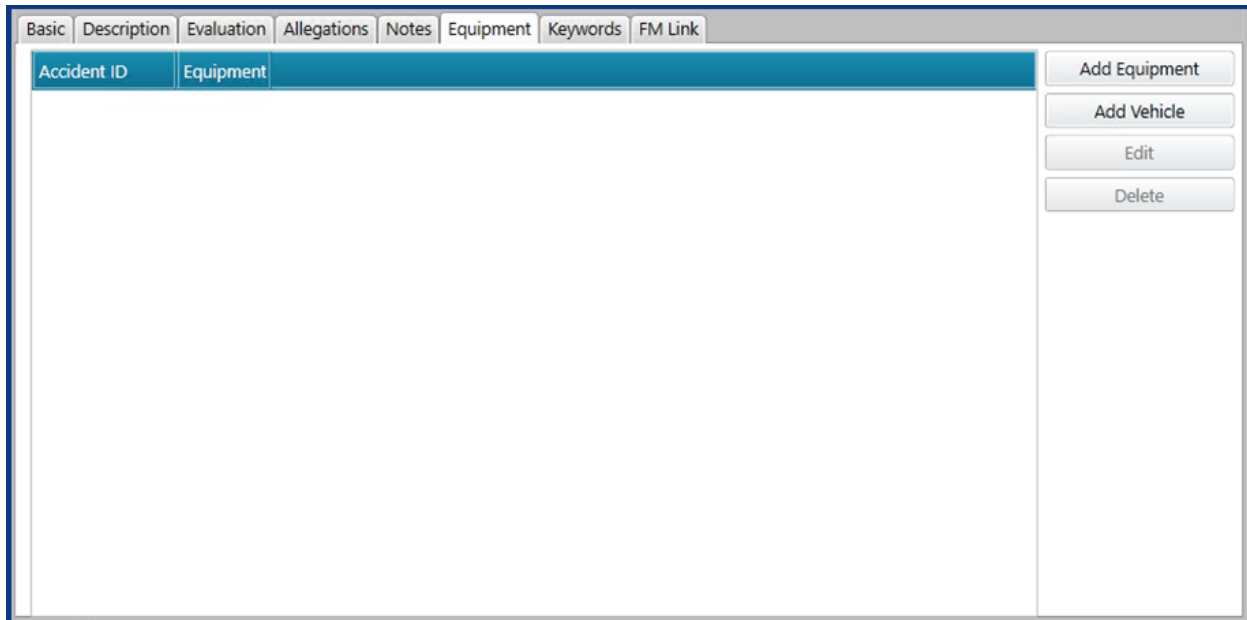
**Filter Type**

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, you must uncheck the **Show Only All** box.)

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**Equipment Tab**

The screenshot shows a software interface with a tabbed menu at the top containing 'Basic', 'Description', 'Evaluation', 'Allegations', 'Notes', 'Equipment', 'Keywords', and 'FM Link'. The 'Equipment' tab is selected and active. Below the tabs is a large empty table area with a header row containing 'Accident ID' and 'Equipment'. To the right of the table are four action buttons: 'Add Equipment', 'Add Vehicle', 'Edit', and 'Delete'.

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.

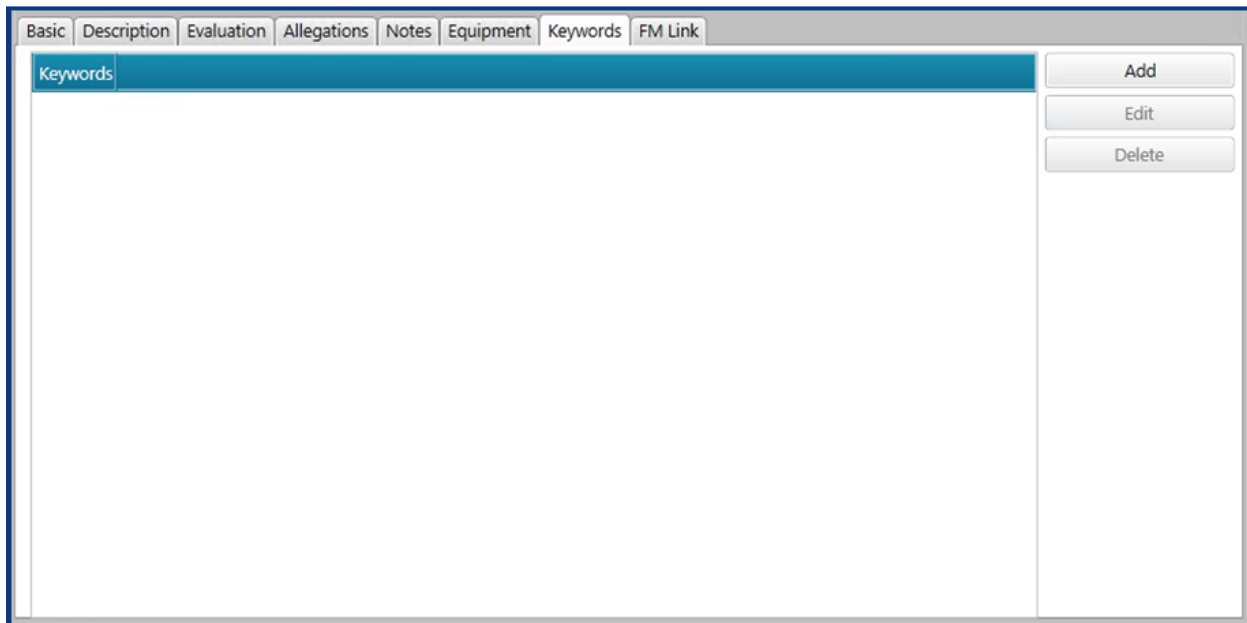
**Edit**

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.

### **Add**

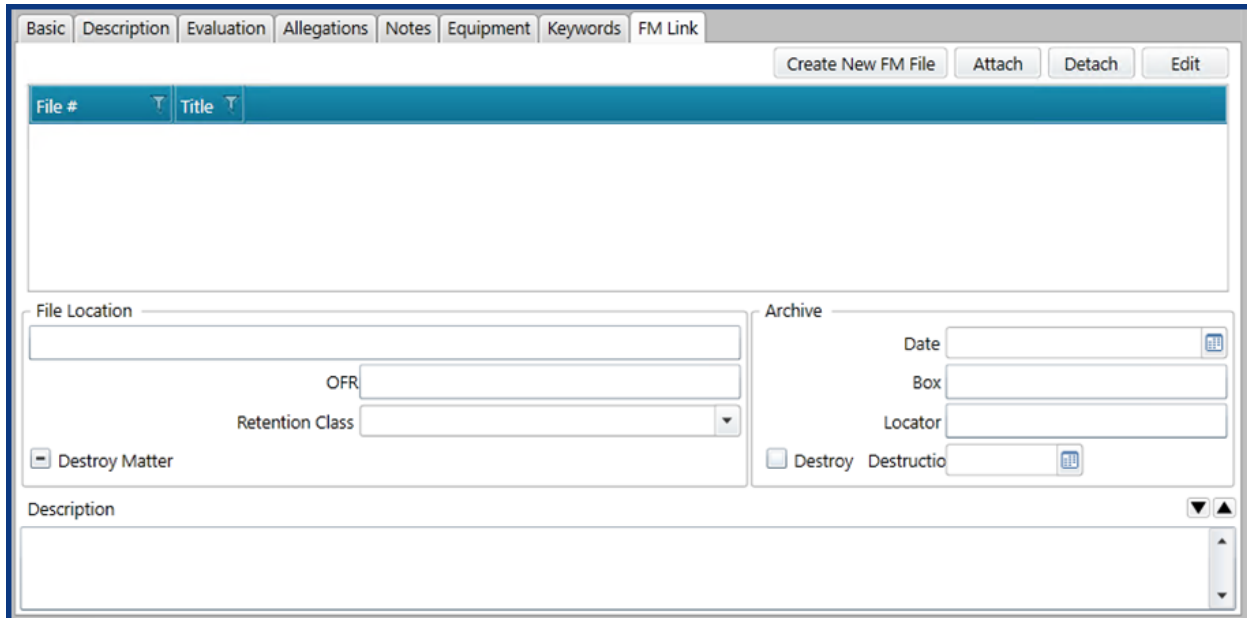
An action button that opens the **Keyword Add** tool to create a new keyword.

### **Edit**

An action button that opens the **Keyword Edit** tool to edit the selected keyword entry.

### **Delete**

An action button that deletes the selected keyword entry.

**FM Link Tab**

Basic Description Evaluation Allegations Notes Equipment Keywords FM Link

Create New FM File Attach Detach Edit

File #	Title
--------	-------

File Location

File Location

OFR

Retention Class

Destroy Matter

Archive

Date

Box

Locator

Destroy Destructio

Description

The **FM Link** tab has fields to enter file storage, archival, and destruction information. There are four 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.