

## Quick Reference Guide

There are 5 steps to complete this task:

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

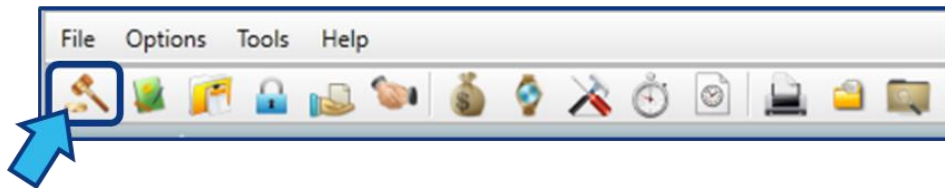
## Standard Guide

### Step 1. Open the Litigation module.

There are 2 ways to open this module.

#### 1-Step Option:

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

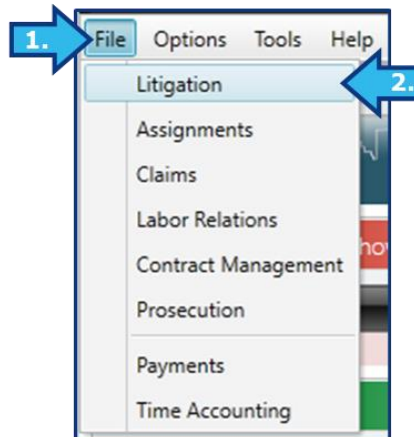


**+** **Helpful Hint**

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

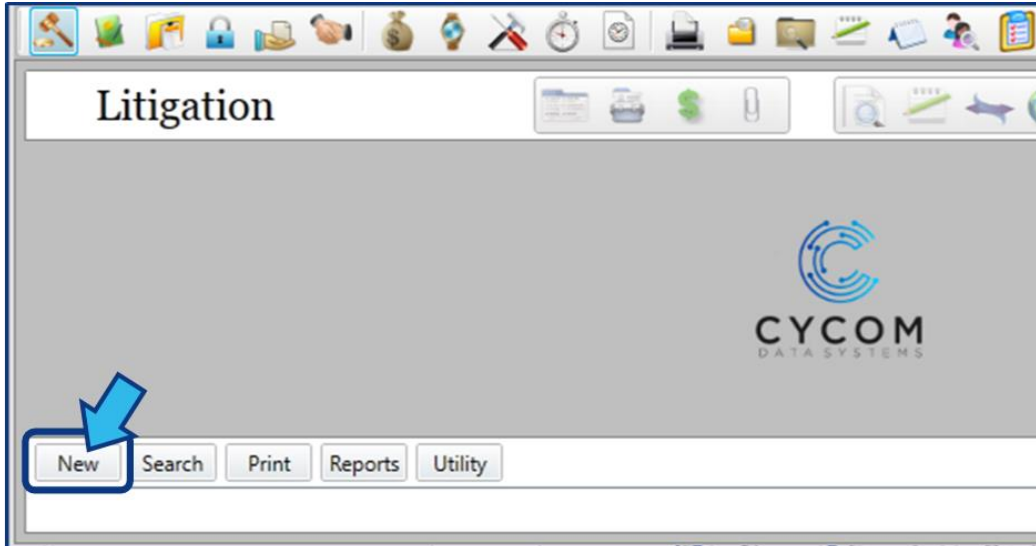
#### 2-Step Option:

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



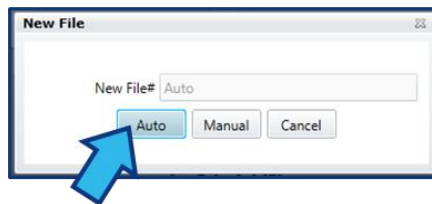
## Step 2. Press New.

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



## Step 3. Press Auto in the New File window.

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

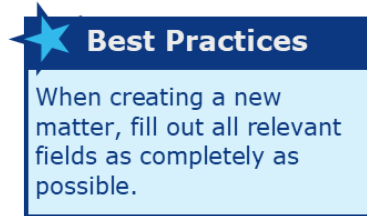


## Step 4. Fill out the mandatory fields in the New Litigation Entry window.

A **New Litigation Entry** window appears on completing **Step 3**. Fill out the mandatory fields for the matter.

Looking for field descriptions?

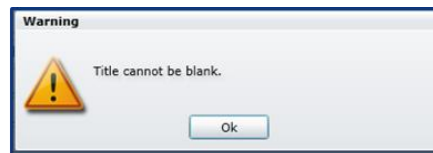
Check out the [New Litigation Entry Field Description Guide](#).



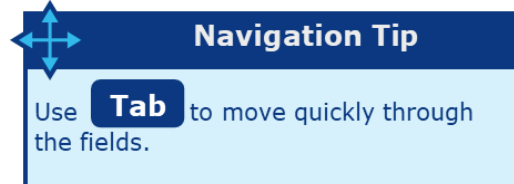
**Best Practices**

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

**Mandatory** fields are marked with an asterisk (\*). The new matter cannot be saved until values for these fields are provided. A **Warning** window will appear if you try to save a new litigation without values in these fields.

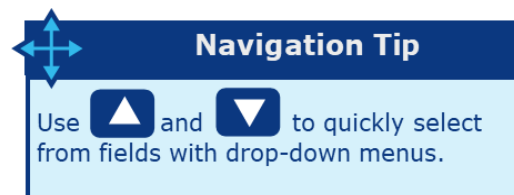


You can navigate from field to field using **Tab** or **Shift + Tab** and can cycle through drop-down lists with the up and down arrow keys.





**Navigation Tip**

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

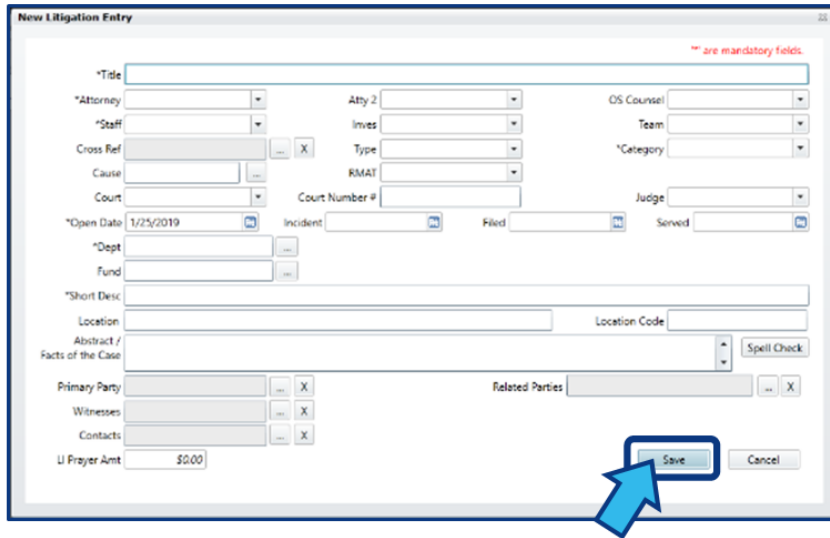


**Navigation Tip**

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

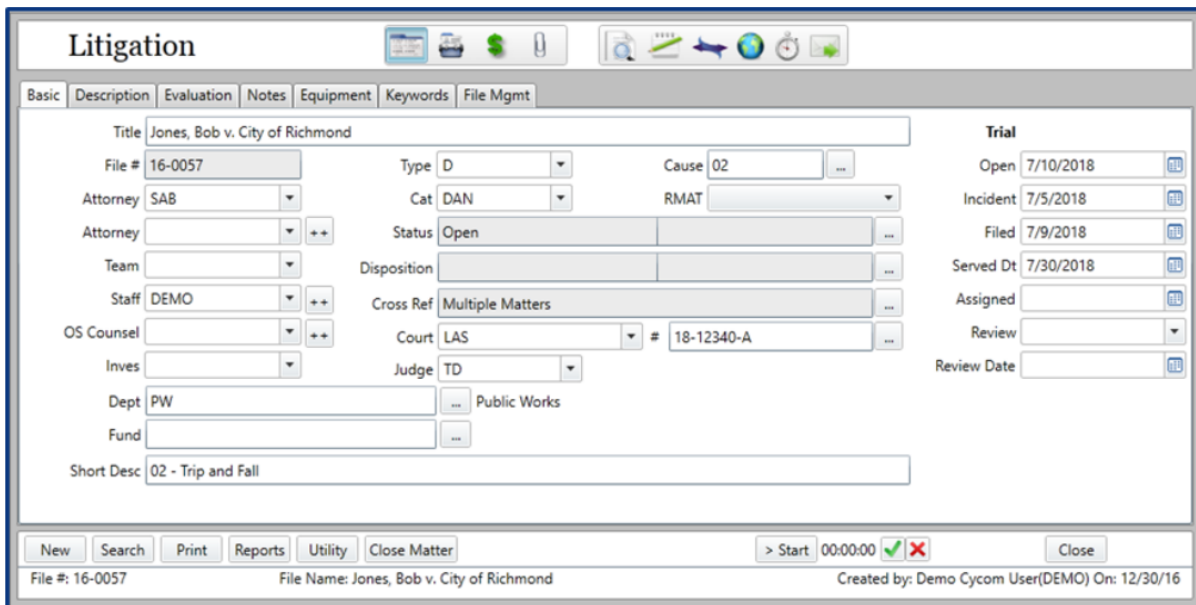
## Step 5. Press Save.

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



The screenshot shows the 'New Litigation Entry' form with various fields for case information. A blue arrow points to the 'Save' button in the bottom right corner of the form.

After saving, the **Basic** tab of your new **Litigation** matter will appear.



The screenshot shows the 'Litigation' application window with the 'Basic' tab selected. The case details are as follows:

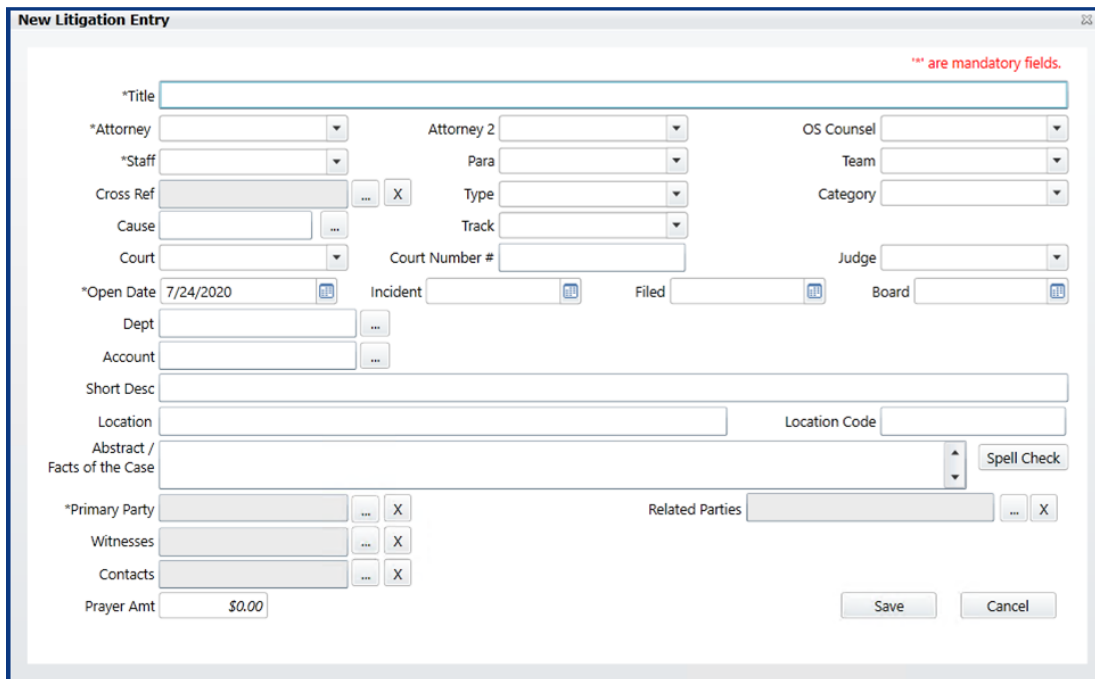
Basic		Description		Evaluation		Notes		Equipment		Keywords		File Mgmt	
Title	Jones, Bob v. City of Richmond												
File #	16-0057	Type	D	Cause	02	Trial		Open	7/10/2018				
Attorney	SAB	Cat	DAN	RMAT		Incident	7/5/2018						
Attorney		Status	Open			Filed	7/9/2018						
Team		Disposition				Served Dt	7/30/2018						
Staff	DEMO	Cross Ref	Multiple Matters				Assigned						
OS Counsel		Court	LAS	#	18-12340-A	Review							
Inves		Judge	TD			Review Date							
Dept	PW	Public Works											
Fund													
Short Desc	02 - Trip and Fall												

At the bottom of the window, there are buttons for 'New', 'Search', 'Print', 'Reports', 'Utility', and 'Close Matter'. A status bar shows '> Start 00:00:00' and 'Close'. The footer contains: 'File #: 16-0057', 'File Name: Jones, Bob v. City of Richmond', and 'Created by: Demo Cycom User(DEMO) On: 12/30/16'.

## New Litigation Entry Field Description Guide

- **Title**
- **Attorney**
- **Attorney 2 (Atty 2)**
- **Outside Counsel (OS Counsel)**
- **Staff**
- **Paralegal (Para)**
- **Team**
- **Cross Reference (Cross Ref)**
- **Type**
- **Category**
- **Cause**
- **Track**
- **Court**
- **Court Number #**
- **Judge**
- **Open Date**
- **Incident**
- **Filed**
- **Board**
- **Department (Dept)**
- **Account**
- **Short Description (Short Desc)**
- **Location**
- **Location Code**
- **Abstract / Facts of the Case**
- **Primary Party**
- **Related Parties**
- **Witnesses**
- **Contacts**
- **Prayer Amount (Prayer Amt)**

The configuration of the **CLW** installation in your office determines which fields are mandatory or disabled, and which fields are visible. If you discover an issue with the field configuration in the **New Litigation Entry** window, please contact your **System Administrator**.



## Title

The name of the new matter.

**This is a mandatory field.**

## Attorney

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

## Attorney 2 (Atty 2)

An additional attorney, if applicable.

**Outside Counsel (OS Counsel)**

Outside Counsel used on the matter.

**Staff**

The staff assigned to the matter, or the staff responsible for managing the entry of this matter.

**Paralegal (Para)**

The paralegal assigned to this matter.

**Team**

The team to which the matter is assigned.

**Cross Reference (Cross Ref)**

It is possible to cross-reference another matter when creating a new case. See [Cross-referencing a matter](#) to learn more.

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

**Cause**

The cause code for the matter.

**Track**

A tracking code to identify the matter handling process.

**Court**

The court that will see this matter.

**Court Number #**

The court number for this matter.

**Judge**

The judge that will preside over this matter.

**Open Date**

The date the matter was opened.

**Incident**

The date of the incident.

**Filed**

The date the matter was filed.

**Board**

The board date of the matter.

**Department (Dept)**

The Department field 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 Description (Short Desc)**

A short description of the matter.

**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.

**Abstract / Facts of the Case**

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

**Primary Party**

The primary party, or parties, on this matter. Primary parties typically include the Claimant and Respondent.

**Related Parties**

Parties related to a primary party. Related parties typically include attorneys or others responsible for representing the interests of, or acting as agents for, a primary party.

**Witnesses**

Individuals who may have witnessed the incident or may provide relevant information.

**Contacts**

Additional individuals relevant to the matter that are neither assigned staff, primary parties, related parties, or witnesses.

**Prayer Amount (Prayer Amt)**

The amount the Litigant is seeking to resolve the matter.