

These notes are provided by **Cycom Data Systems, Inc.** to support the use of **CLNG (CityLaw/CountyLaw Next Gen)** 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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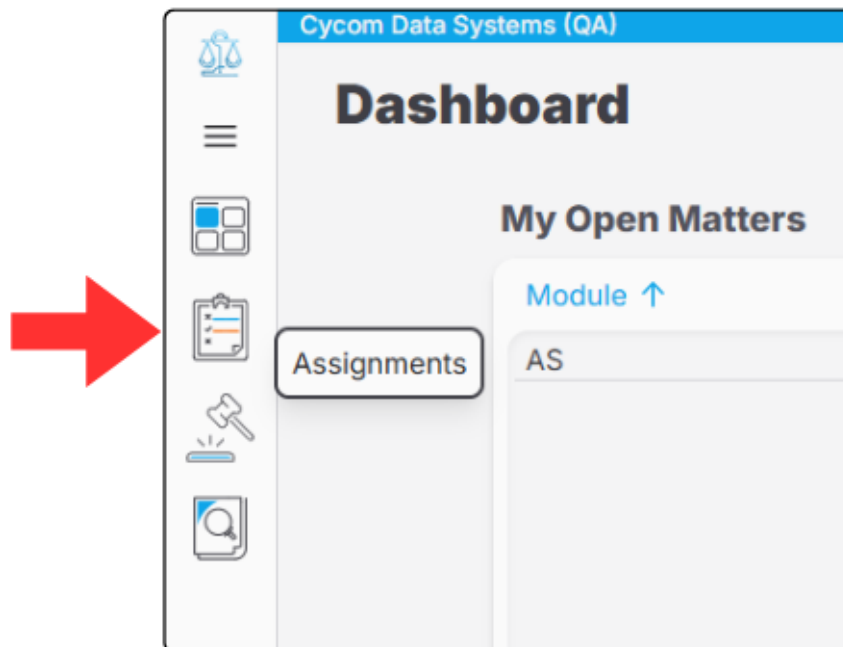
- o Basic Tab
- o Description Tab
- o Status Tab
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Assignments Basic Actions

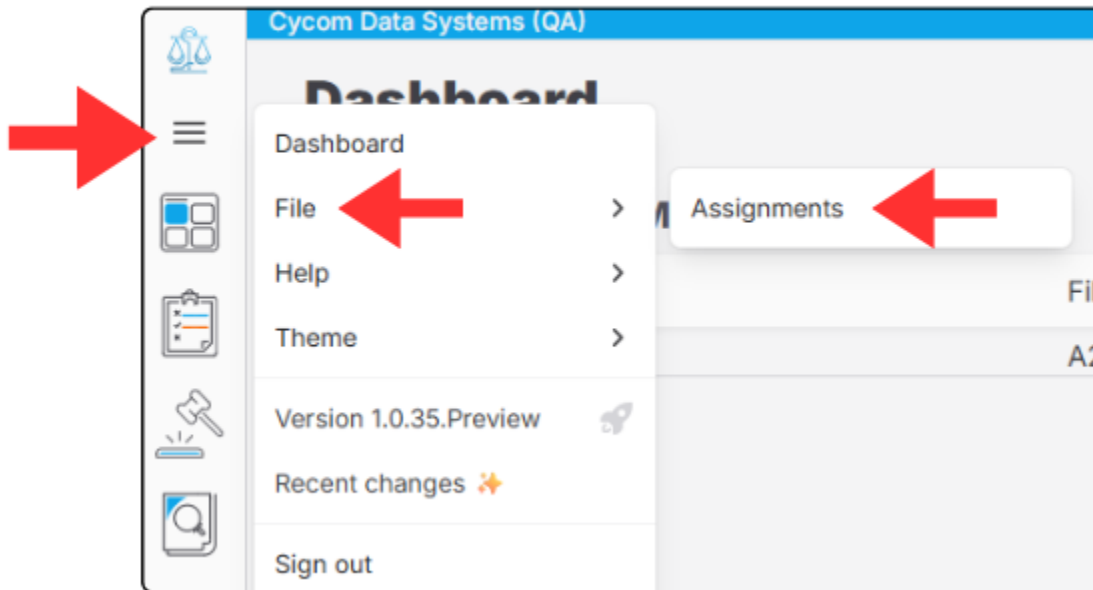
- Open the Assignments Module
- Create a New Assignments Matter
- Find an Assignments Matter
- Close an Assignments Matter

Open the Assignments Module

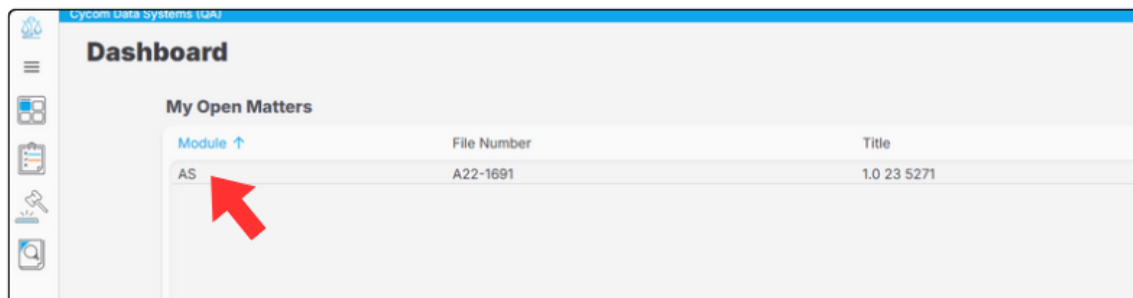
The **Assignments** module can be opened by selecting the **Assignments** icon from the **Global Toolbar**.



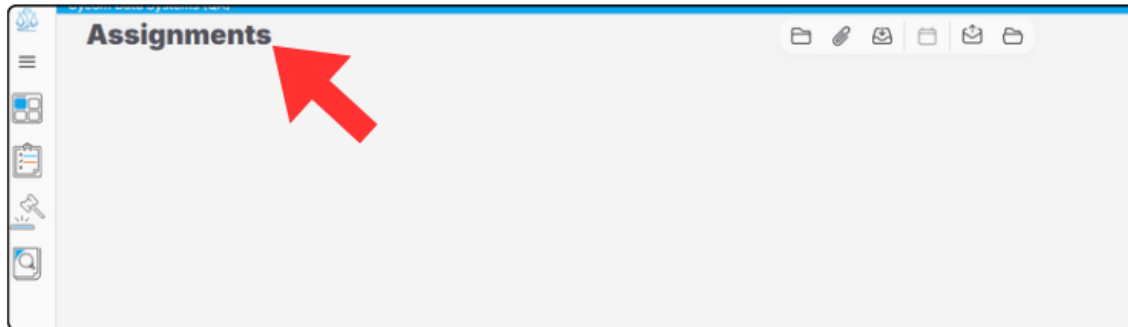
It can also be opened by selecting **File** from the **App Menu** and then selecting **Assignments** from the list of options.



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 **Dashboard** view, then double-clicking on that matter will open the **Assignments** module.

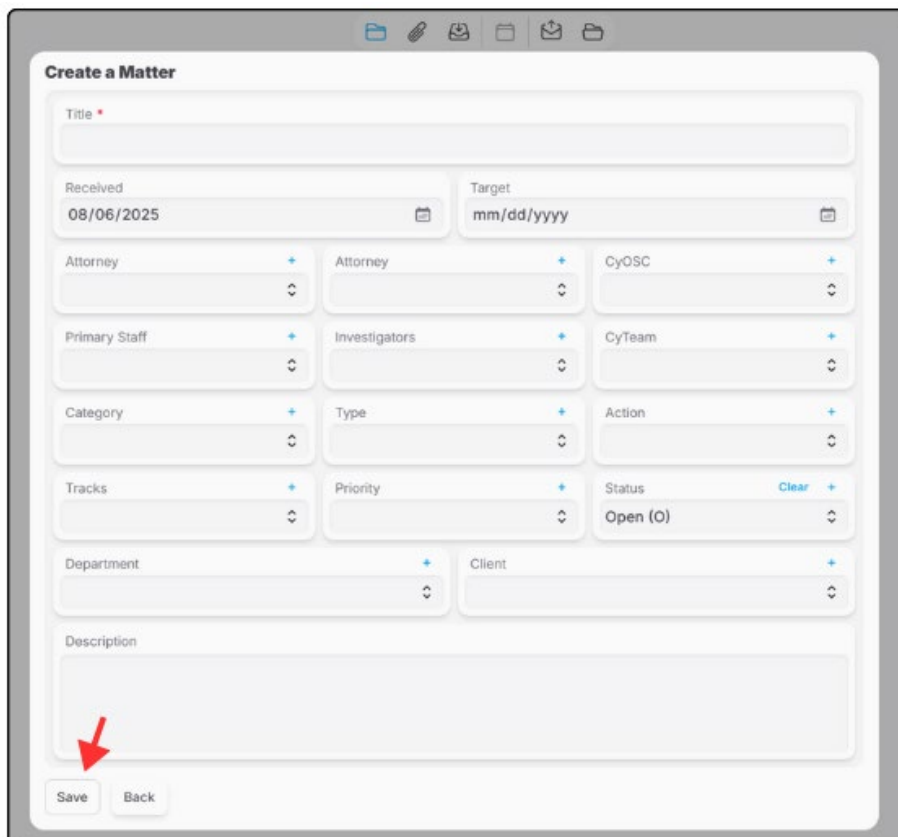


You will know you are in the **Assignments** module when you see the **Assignments** header.



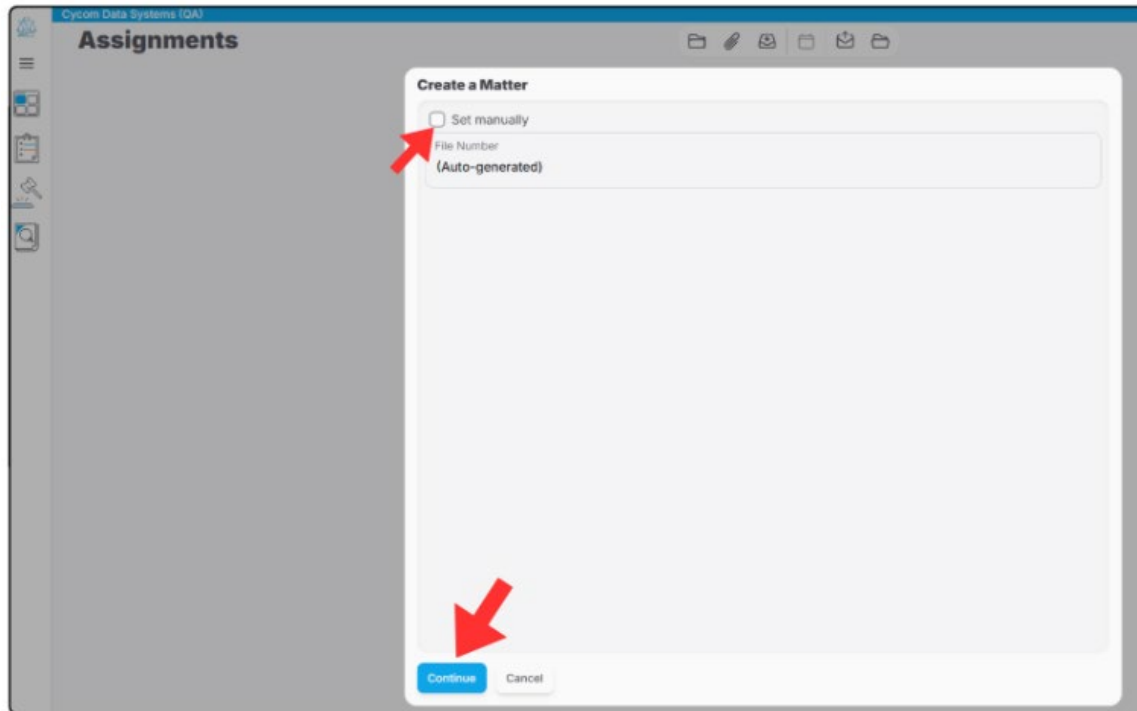
Create a New Assignments Matter

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

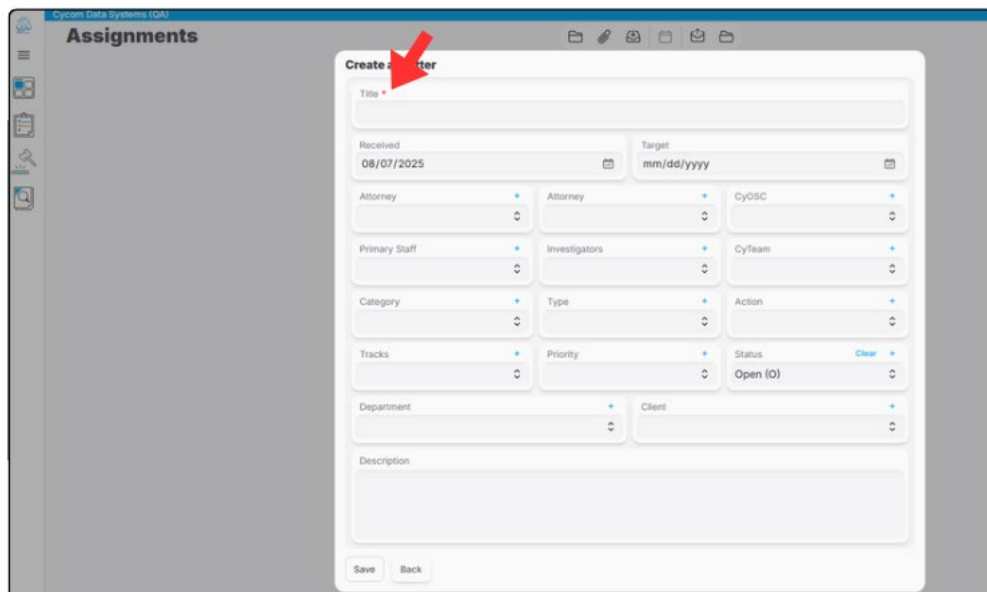


A screenshot of a "Create a Matter" form. The form is titled "Create a Matter" and contains several input fields and dropdown menus. The fields are: "Title" (required), "Received" (date field with "08/06/2025"), "Target" (date field with "mm/dd/yyyy"), "Attorney" (dropdown), "Primary Staff" (dropdown), "Category" (dropdown), "Tracks" (dropdown), "Department" (dropdown), "Investigators" (dropdown), "Type" (dropdown), "Priority" (dropdown), "Client" (dropdown), "CyOSC" (dropdown), "CyTeam" (dropdown), "Action" (dropdown), "Status" (dropdown with "Open (0)" and a "Clear" link), and "Description" (text area). At the bottom left, there are "Save" and "Back" buttons. A red arrow points to the "Save" button.

You will be prompted to create a new **File Number**. You may Select **Set Manually** to enter your own file number or keep it unselected, and it will automatically be assigned with the next available number, click **Continue** for assignment entry.

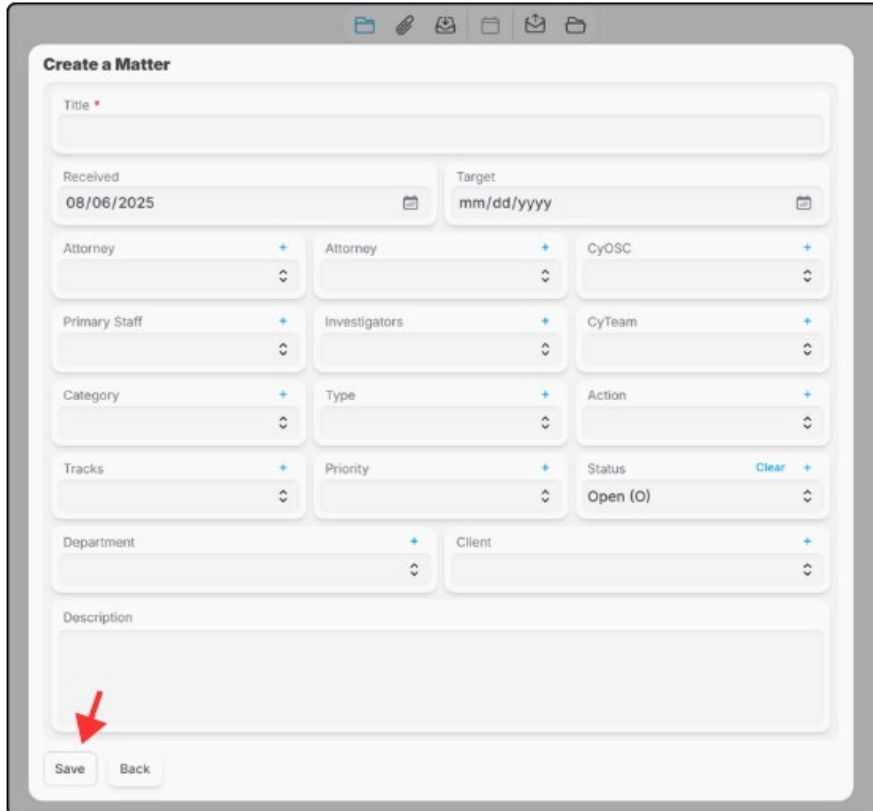


Enter the information on the matter into the **New Assignment Entry** window. Note that mandatory fields are marked with an asterisk.

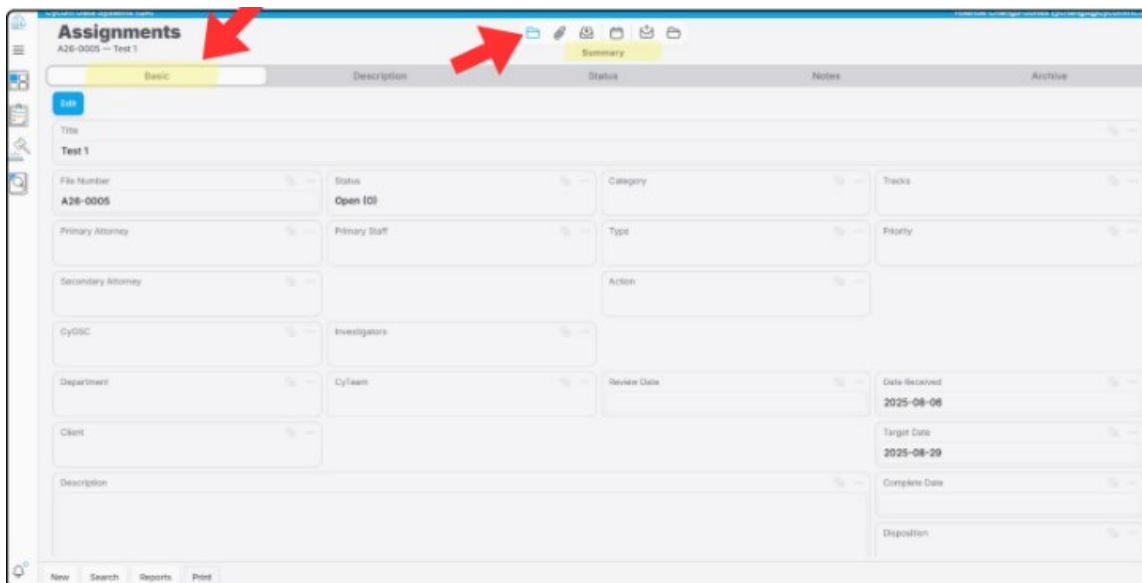


Training Notes Assignments Module

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

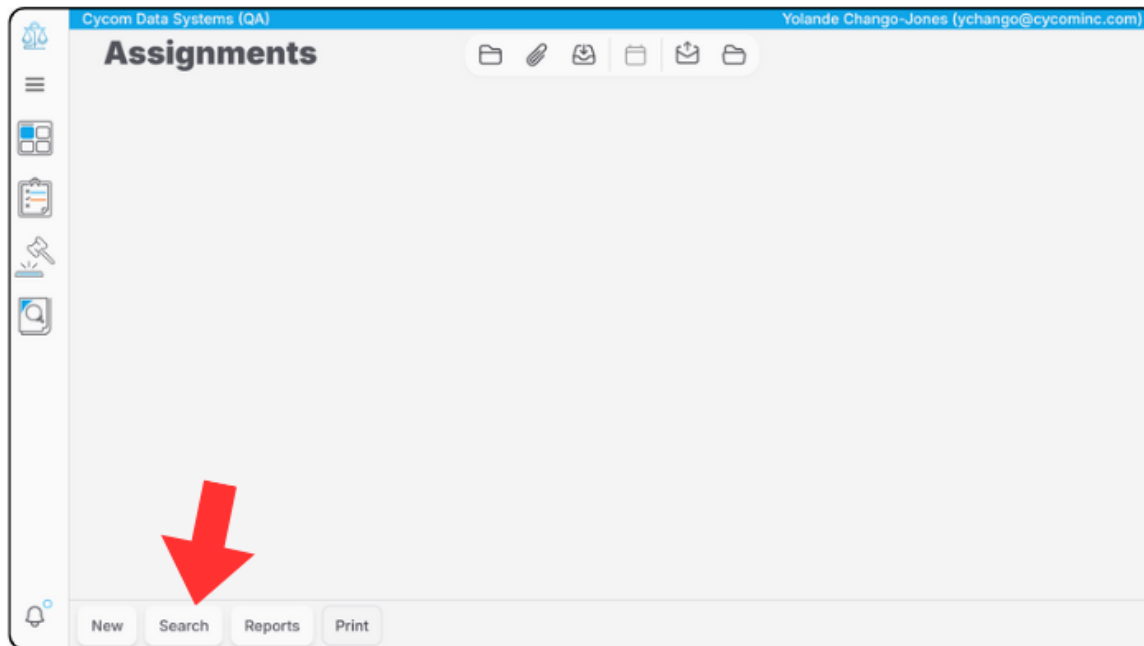


Your new matter will open. By default, it will display the **Basic** tab of the **Summary** view.

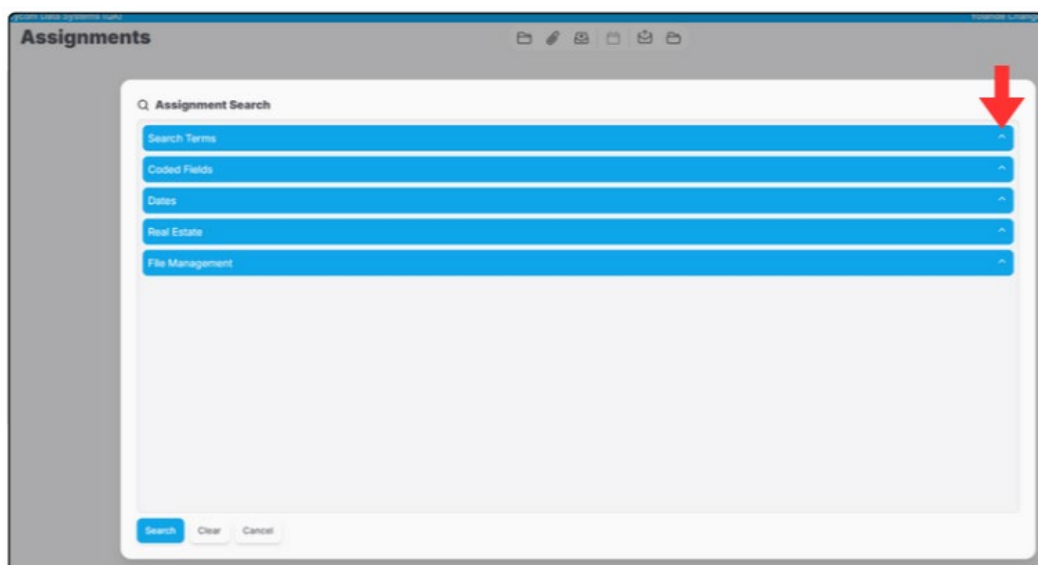


Find an Assignments Matter

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



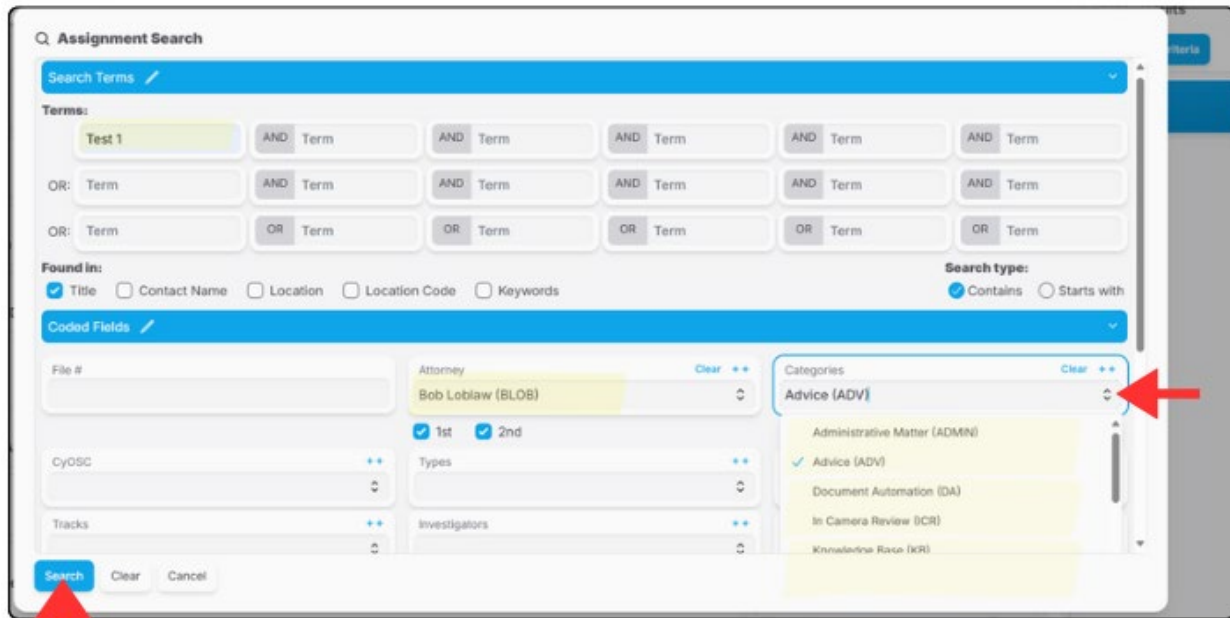
A **Search Criteria** window will appear allowing you to enter or select options to filter your search. Each field listed, **Search Terms, Coded Fields, Dates, Real Estate, File management** has a drop down to the far right (an arrow point up), within each of these fields there are multiple options offered to help narrow down your search.



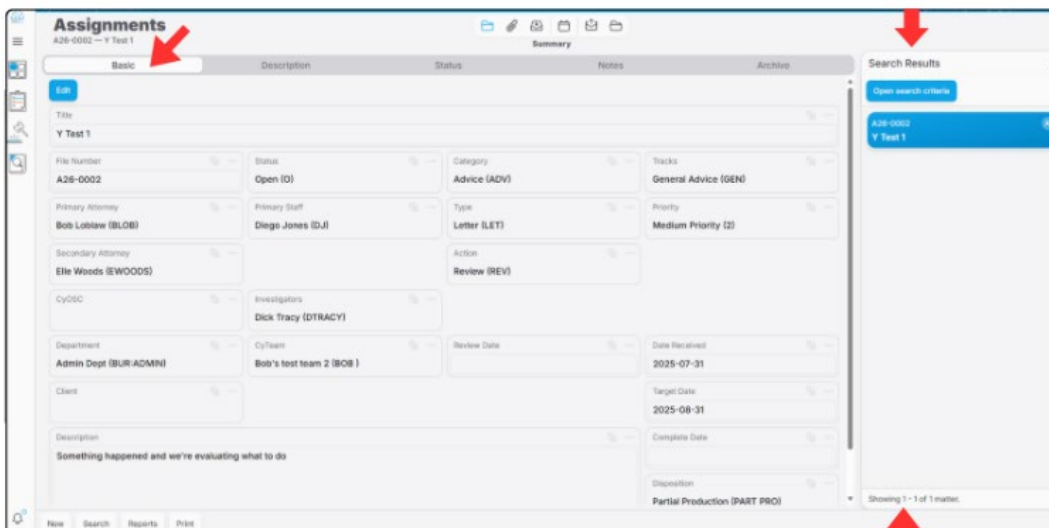
Training Notes Assignments Module

You may enter one criterion or as many as you need in one field or in multiple fields simultaneously. The more information you enter the more defined the search will be. Some of the fields offer a drop-down menu, with predetermined options by your administrator, to select from (see image below).

Once you've entered any information you know to locate the matter. Select **Search** to return the results.



The **Search Results** will appear in a side panel to the right of the screen, the number of matters found will be listed at the bottom of the right panel. The details of the matter highlighted will appear under the **Basic tab** in the left panel (see image below).

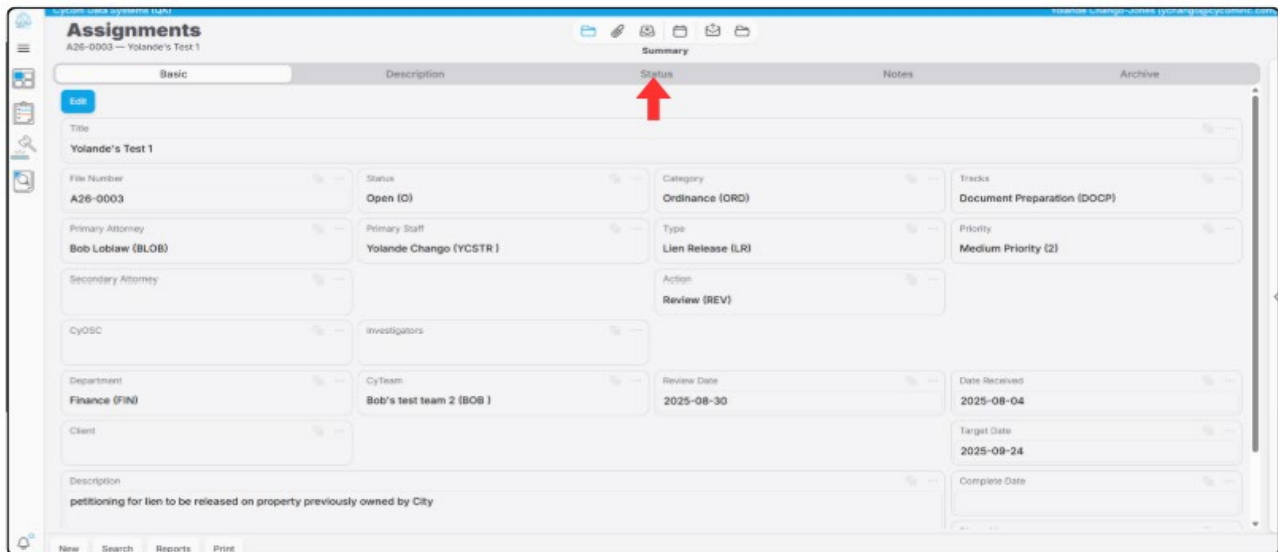


Close an Assignments Matter

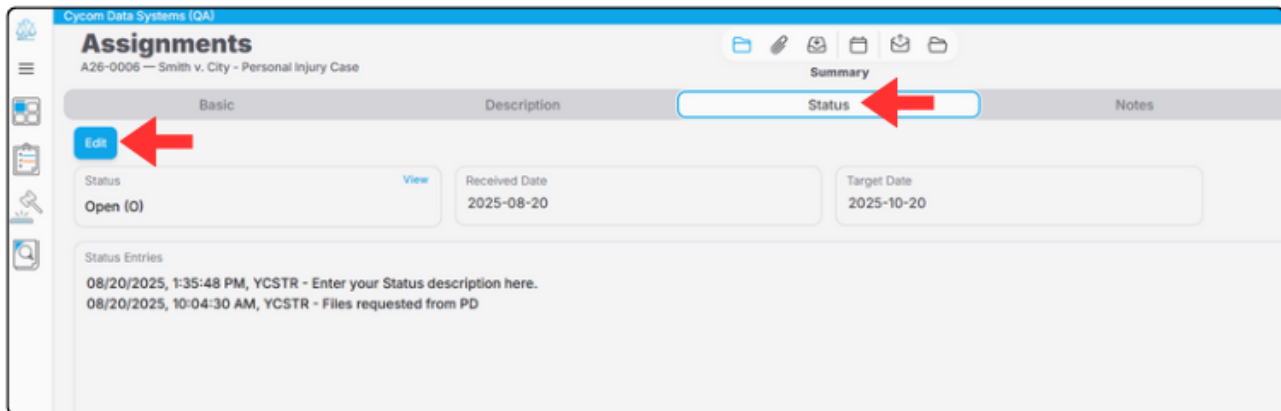
When we speak of closing a matter, this refers to two different tasks. The first refers to closing a matter because you are finished with your edits, research, or additions. The second refers to changing the matter status to closed, such as when a matter is disposed.

To close an **Assignments** matter and continue with other work, you can simply open another **Assignments** matter.

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

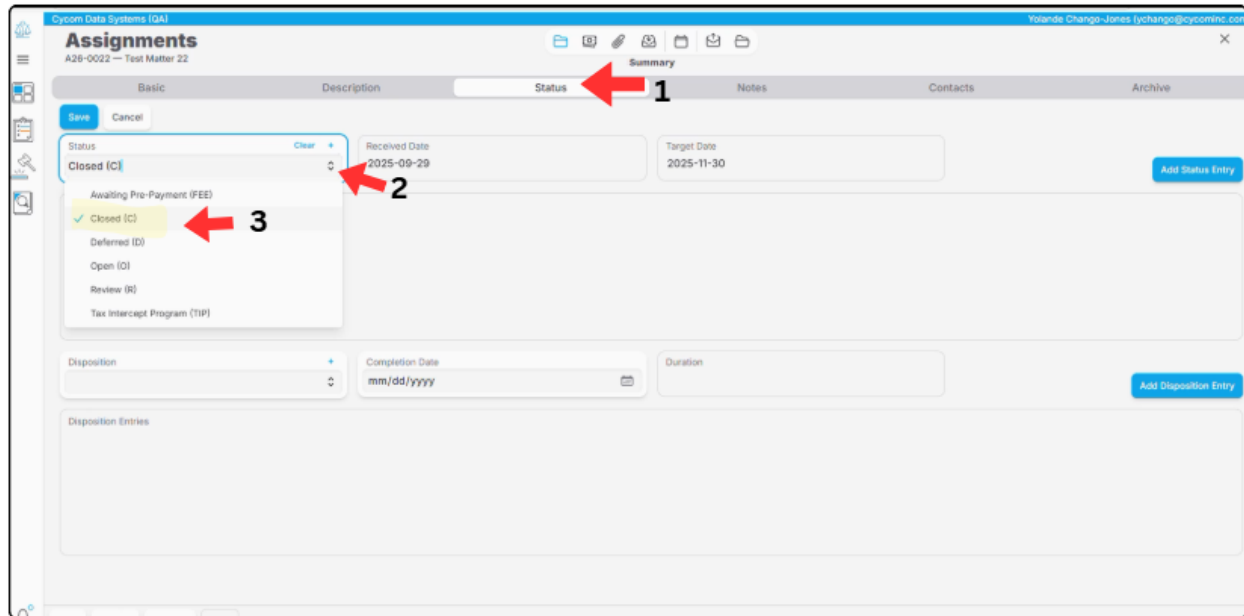


Then select **Edit**.

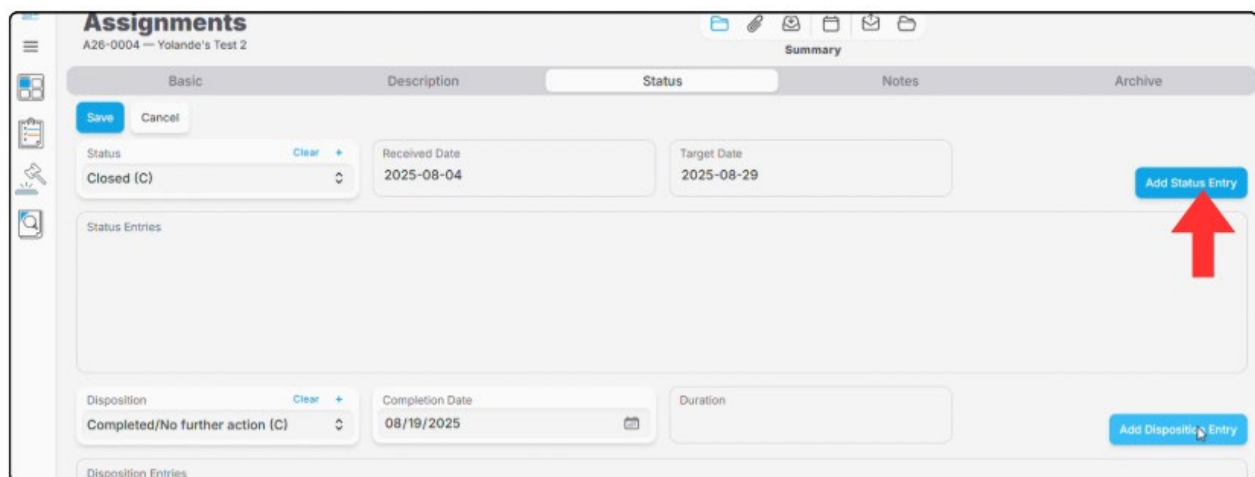


Training Notes Assignments Module

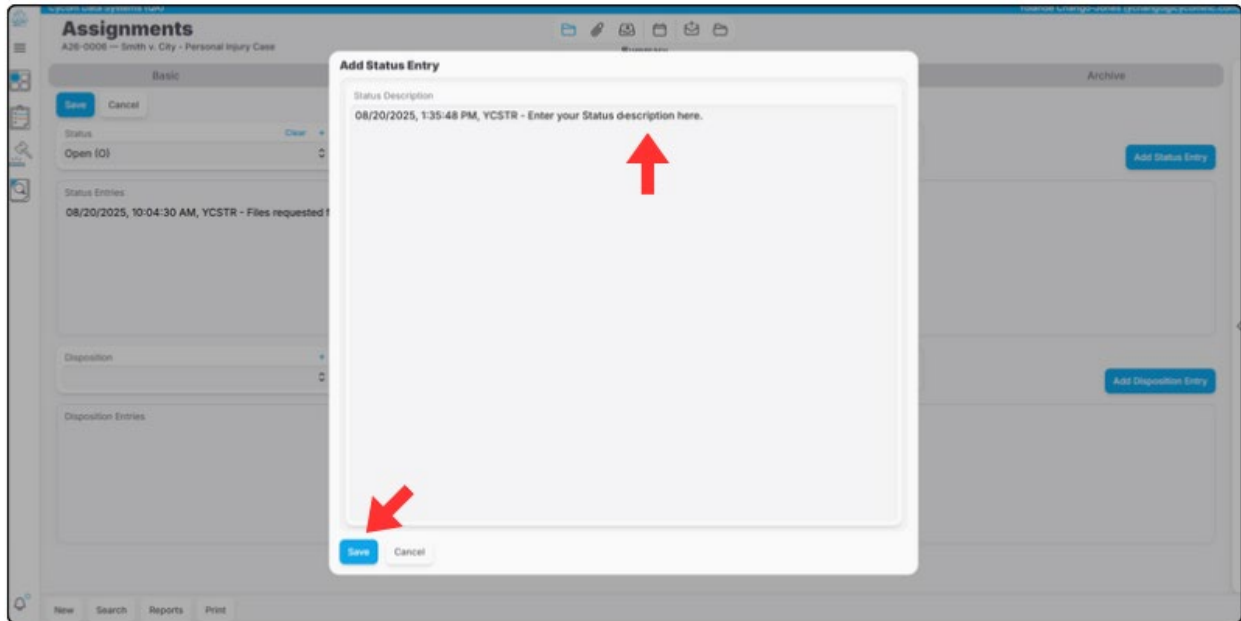
You can dispose an **Assignment** while also setting the matter's status to a closed type. To dispose an **Assignment** in this way, select a closed status type in the **Status** field. You might only have one closed status named **Closed**. Or you might have multiple closed statuses to choose from.



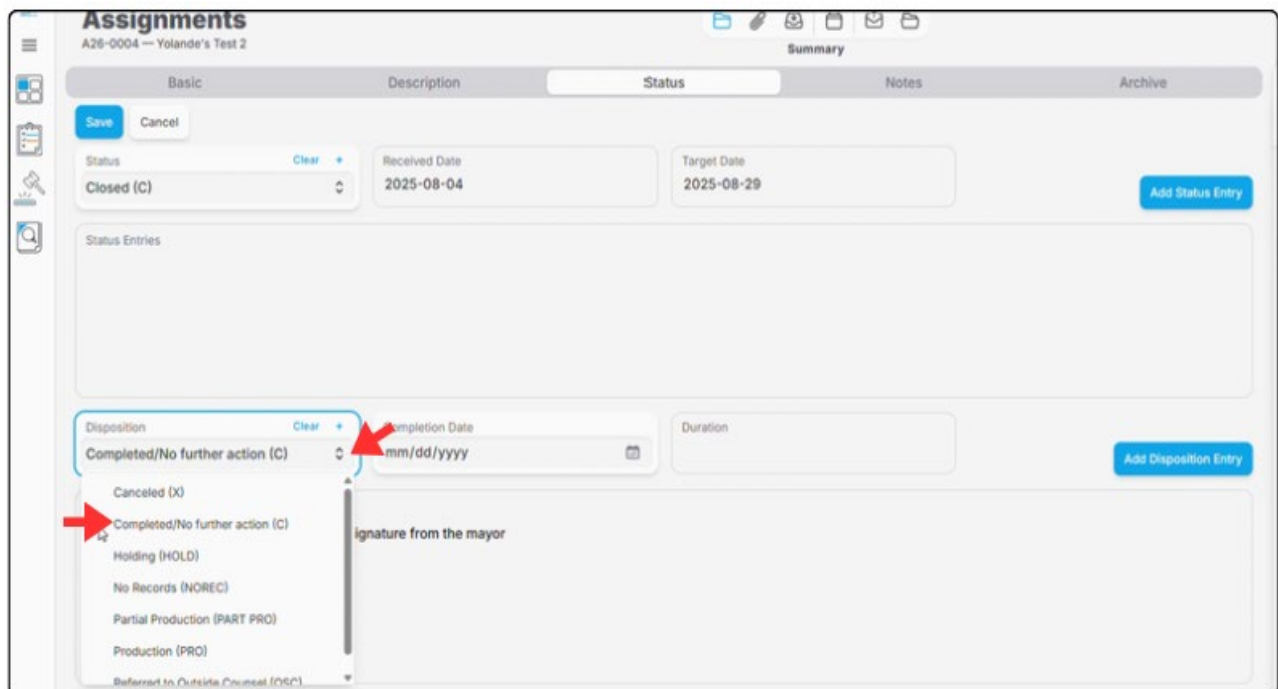
On selecting any closed Type Status, a **Close Matter Preferences** window will appear. By default, the **Status** will be marked with the closed status you chose, and the **Status Description** may be populated with a message. Select **Add Status Entry** to add any additional closing status text desired.



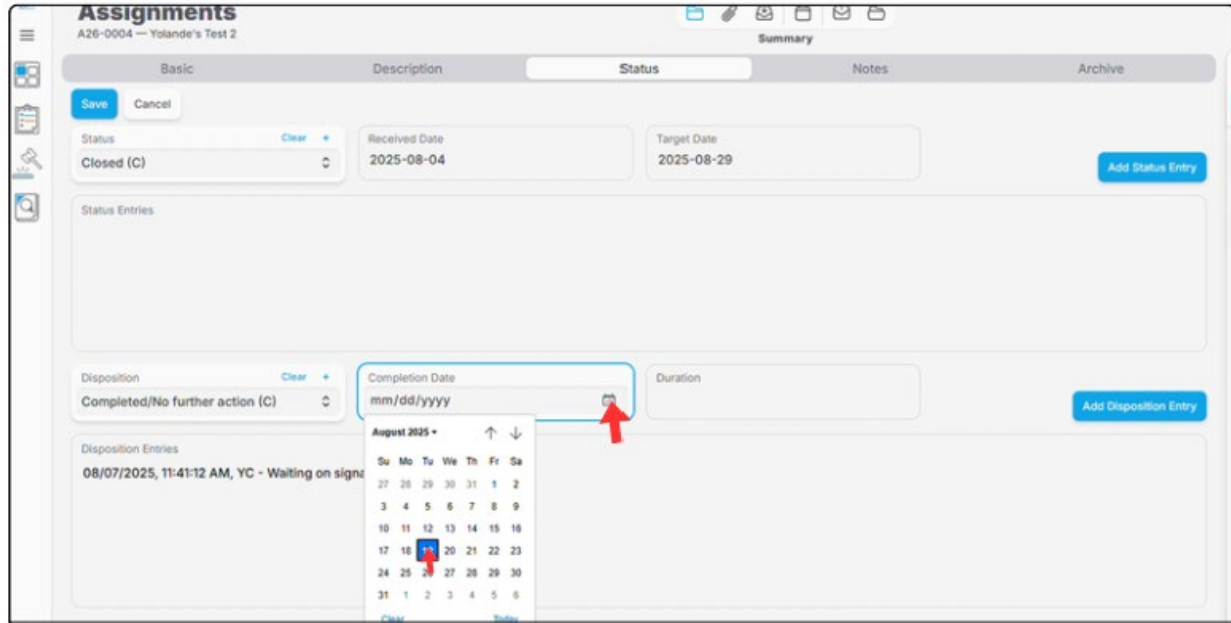
Add Status Entry window will appear. Today's date, time, and the **User ID** (typically the user's initials) are filled in. Enter any additional status closing text. Select **Save**.



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

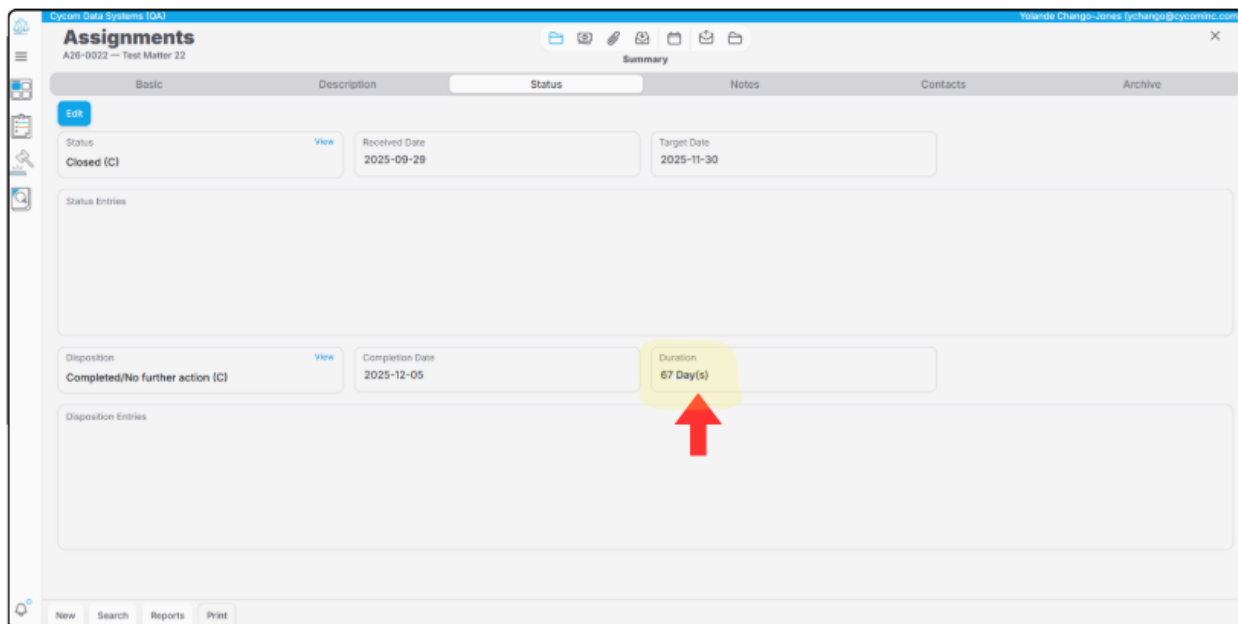


You may enter the **Disposition Date** manually or select it from the drop-down calendar.



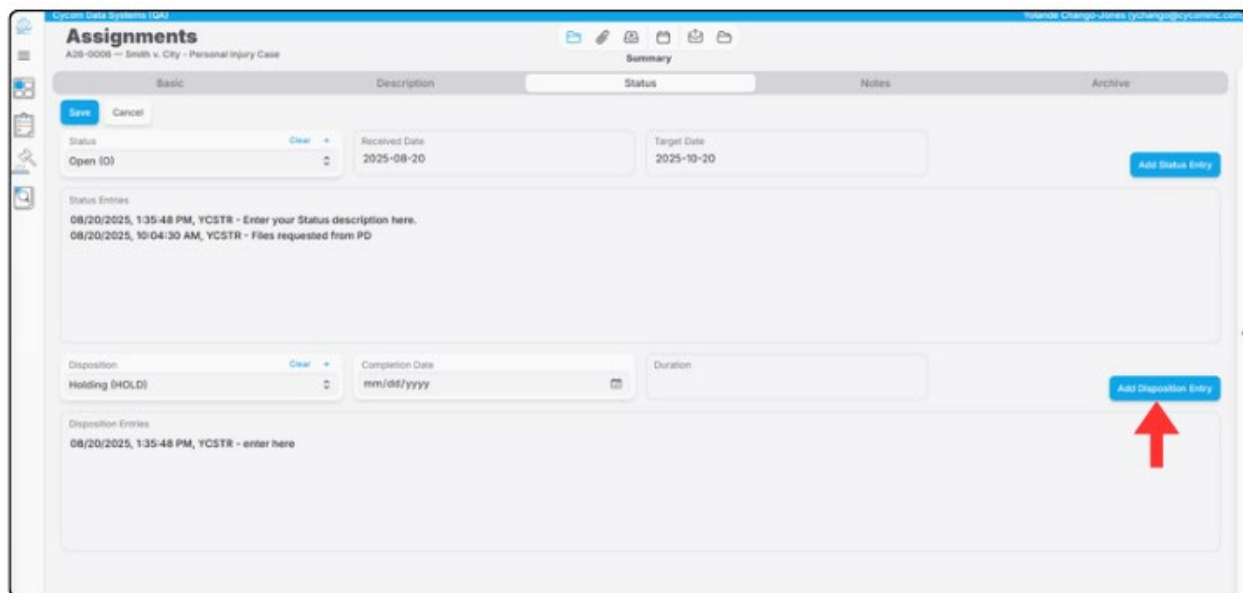
The screenshot shows the 'Assignments' form for 'A26-0004 - Yolande's Test 2'. The 'Status' is 'Closed (C)'. The 'Received Date' is '2025-08-04' and the 'Target Date' is '2025-08-29'. The 'Disposition' is 'Completed/No further action (C)'. The 'Completion Date' field is highlighted with a red box, and a calendar dropdown is open, showing the date '18' selected. A red arrow points to the calendar icon in the completion date field.

The duration will automatically populate once the date is entered and saved.

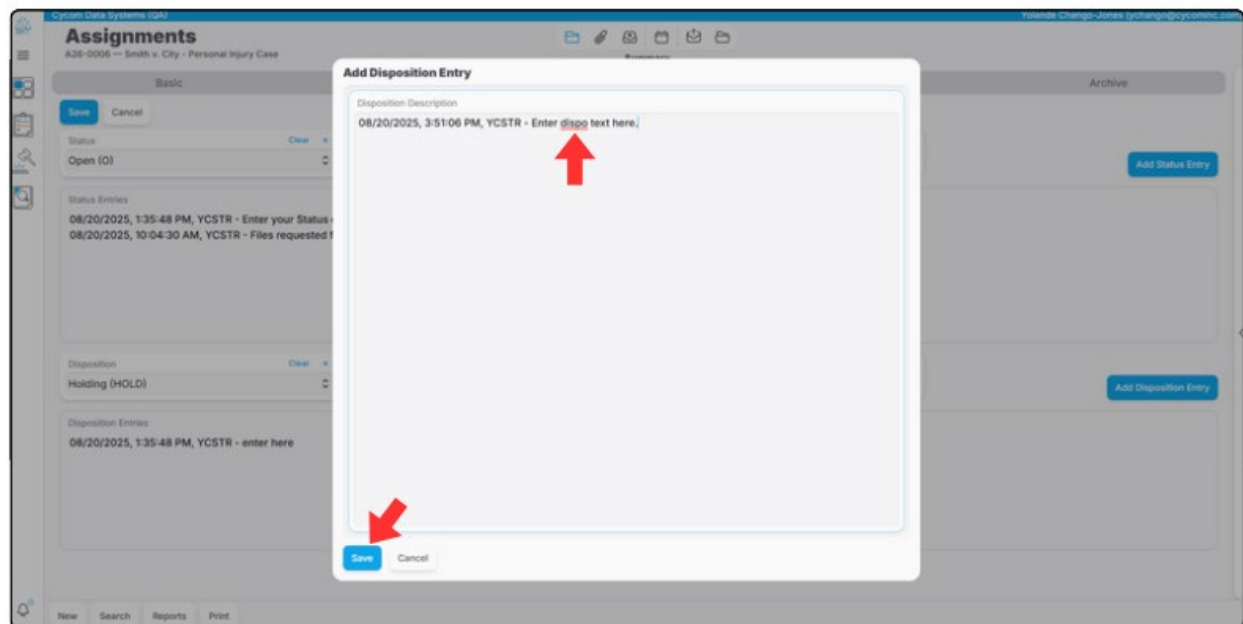


The screenshot shows the 'Assignments' form for 'A26-0022 - Test Matter 22'. The 'Status' is 'Closed (C)'. The 'Received Date' is '2025-09-29' and the 'Target Date' is '2025-11-30'. The 'Disposition' is 'Completed/No further action (C)'. The 'Completion Date' is '2025-12-05'. The 'Duration' field is highlighted with a yellow box and contains the text '67 Day(s)'. A red arrow points to the duration field.

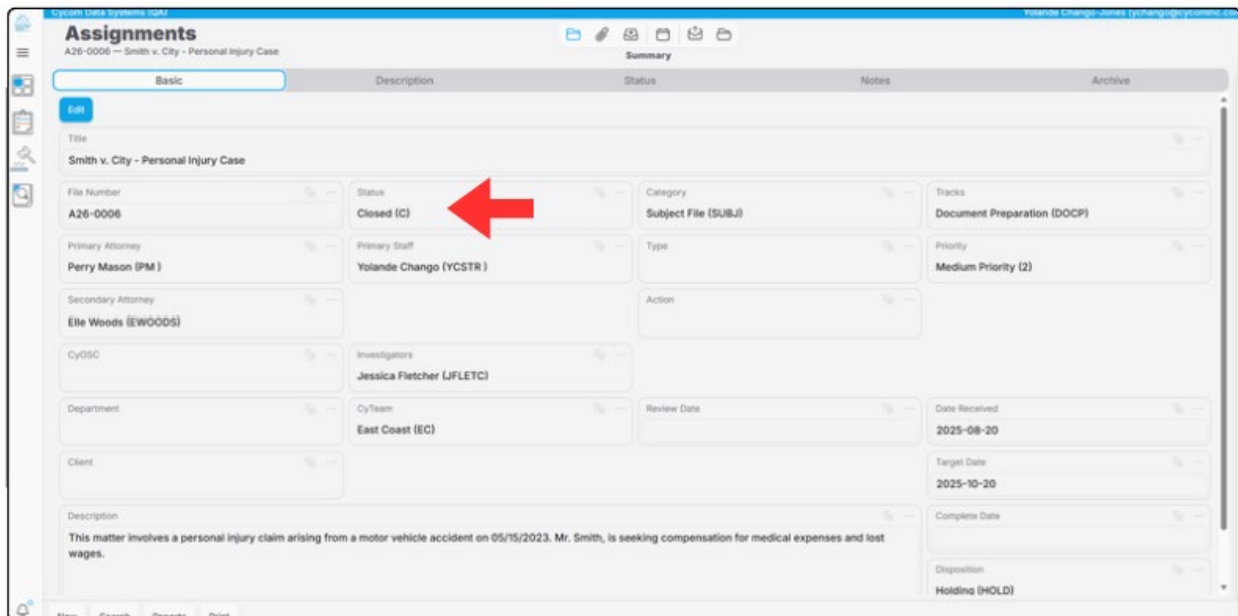
The **Dispo Description** may be populated with a message. Select **Add Disposition Entry** to add any additional closing disposition text desired.



The **Add 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**.



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
A26-0006 — Smith v. City - Personal Injury Case

Summary

Basic Description Status Notes Archive

File Number: A26-0006
Status: Closed (C)
Category: Subject File (SUBJ)
Tracks: Document Preparation (DOCP)
Primary Attorney: Perry Mason (PM)
Primary Staff: Yolande Chango (YCSTR)
Type:
Priority: Medium Priority (2)
Secondary Attorney: Elle Woods (EWOODS)
Action:
CyOSC:
Investigators: Jessica Fletcher (JFLETC)
Department:
CyTeam: East Coast (EC)
Review Date:
Date Received: 2025-08-20
Client:
Target Date: 2025-10-20
Description: This matter involves a personal injury claim arising from a motor vehicle accident on 05/15/2023. Mr. Smith, is seeking compensation for medical expenses and lost wages.
Complete Date:
Disposition: Holding (HOLD)

Assignments Reports Options

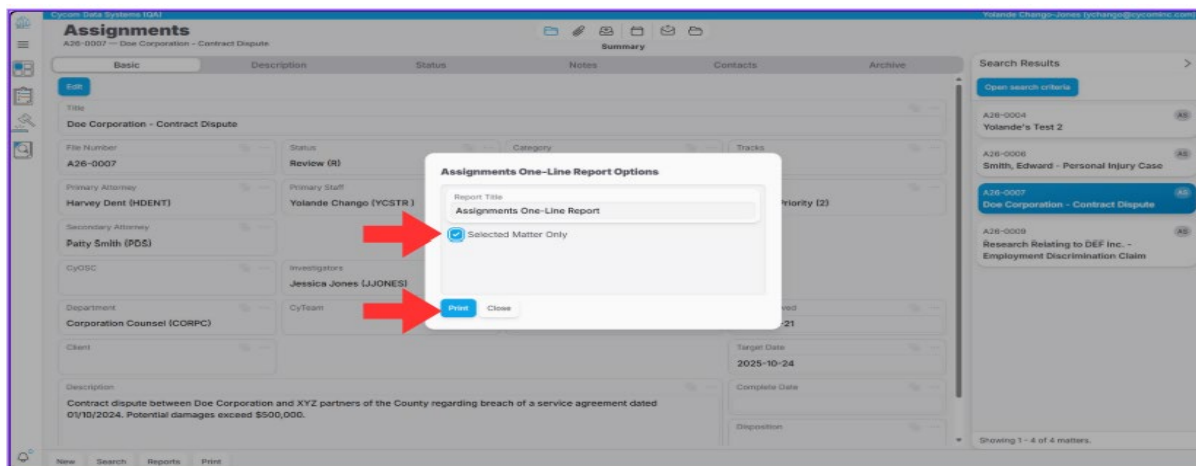
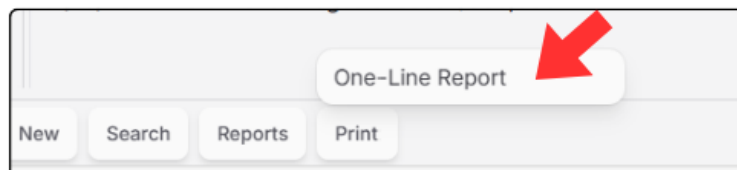
- **Print Customized Assignment Reports**
- **Create Built-in Assignment Reports**

Print Customized Assignment 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.



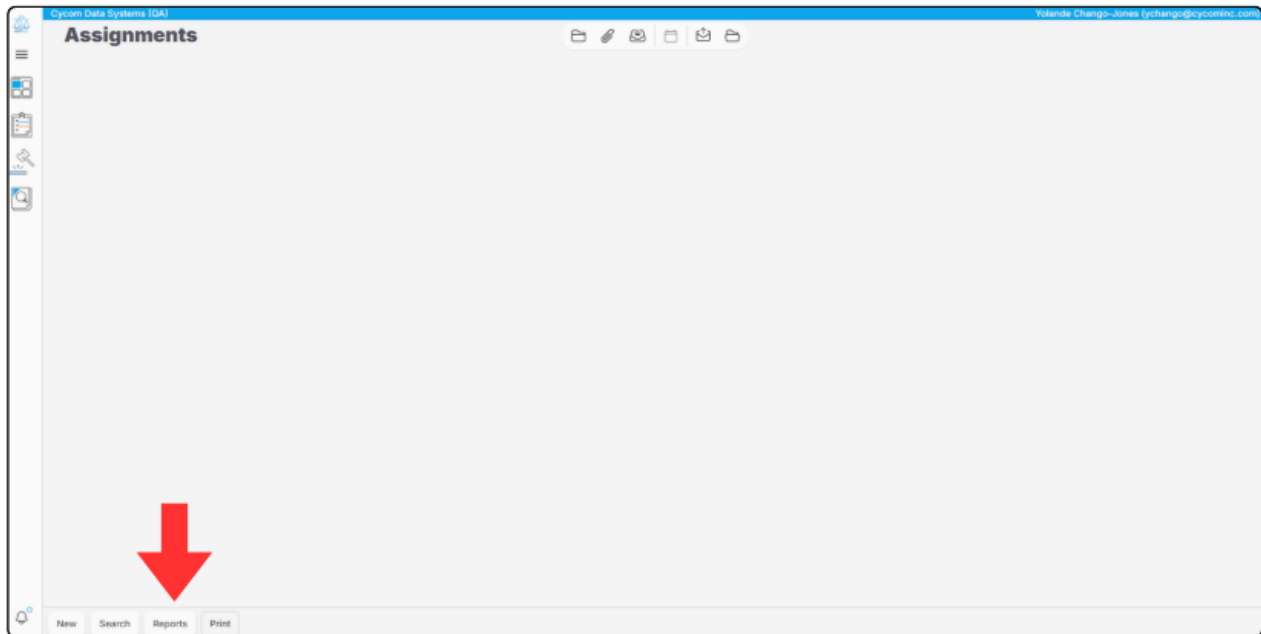
If you want to create a report for only the active matter, be sure to check the box for **Selected matter only**. If this box is unchecked, any report will include all the matters listed in the **Search Results**.



Click **Print** at bottom left of pop-up window to generate the report.

Create Built-in Assignment Reports

For other types of reports, while in the **Assignment Module** or within a matter, click **Reports** in the action bar at the bottom.



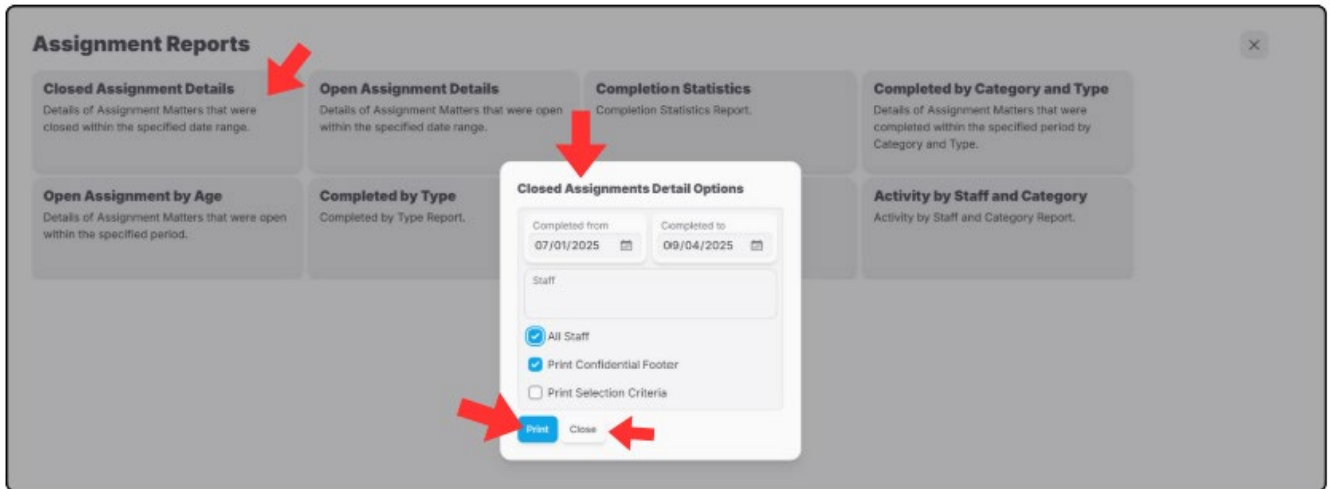
An **Assignment Reports** window will open, and a list of **Report Options** will be listed with descriptions of what is included in each report. To close this window, click the **X** at the far top right of the window.



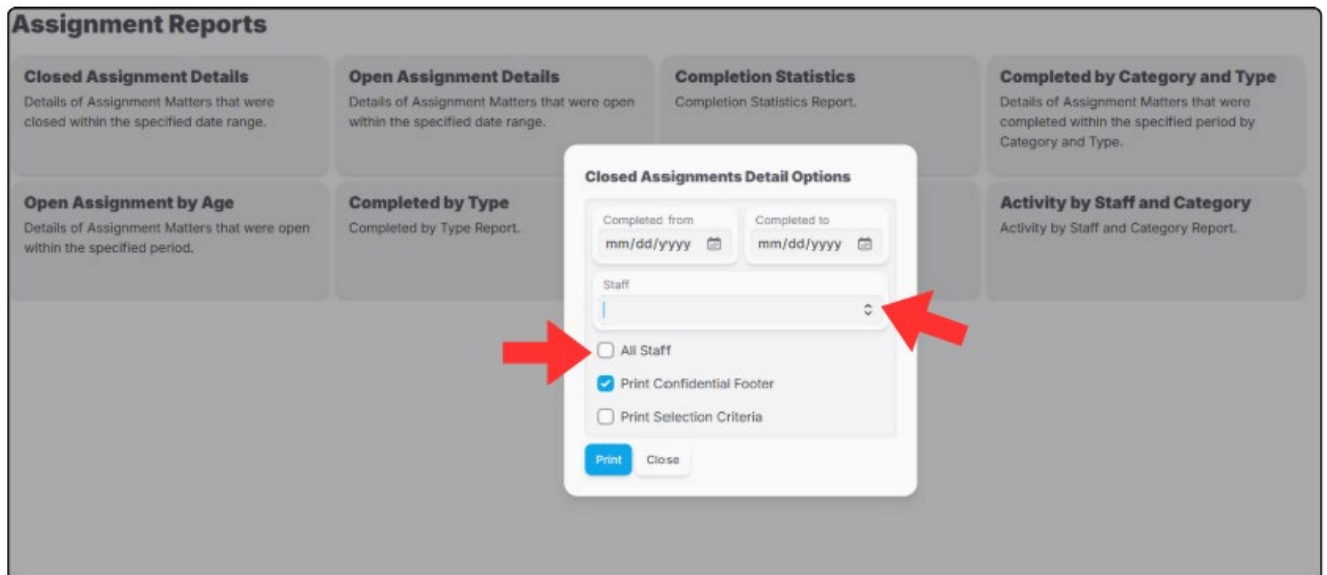
When you hover over a report button the color will turn to darker grey. Select the type of report you wish to generate by clicking on it. A pop-up window will appear.

Training Notes Assignments Module

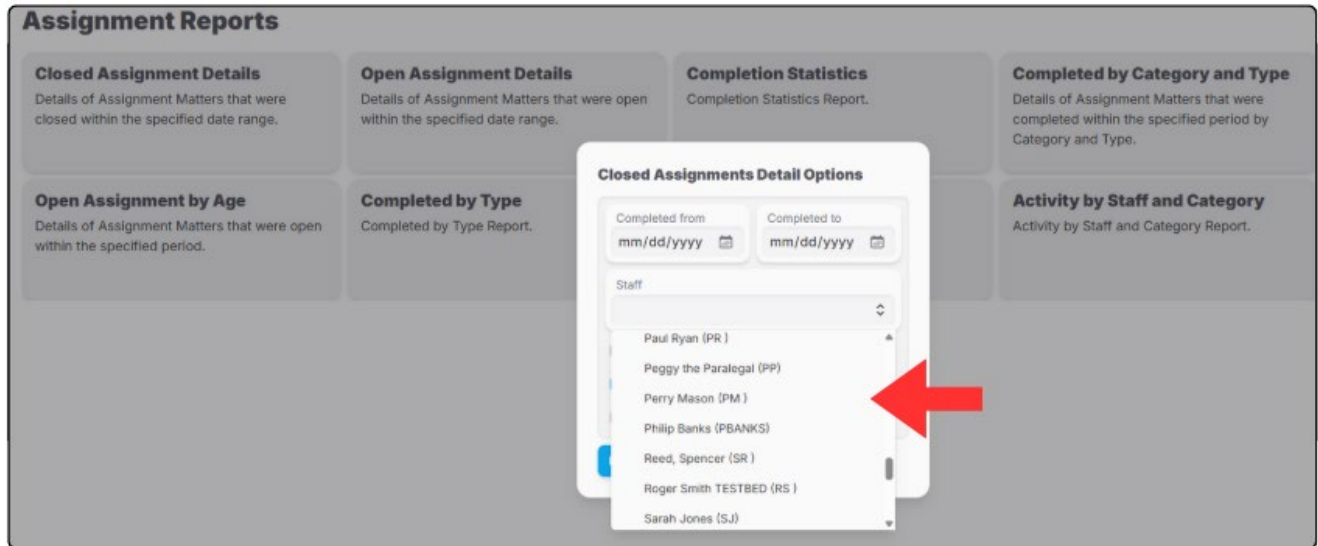
Some reports allow additional options, and you will be prompted to make your selections. Select the **Print** button to view your report. If you selected the report type in error, select the **Close** button to close the options window and resume your selection.



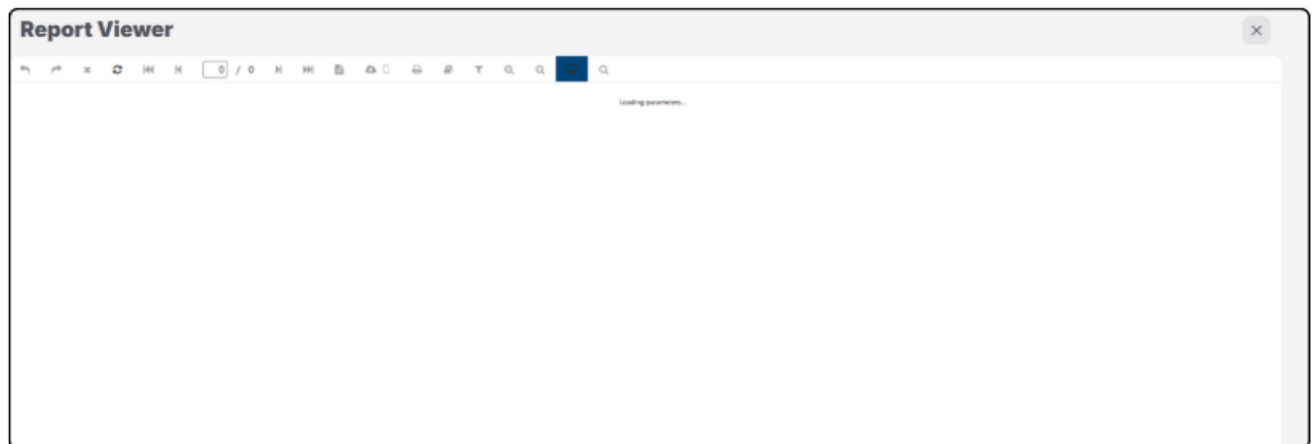
When you de-select **All Staff**, a drop-down option for the **Staff** field becomes available.



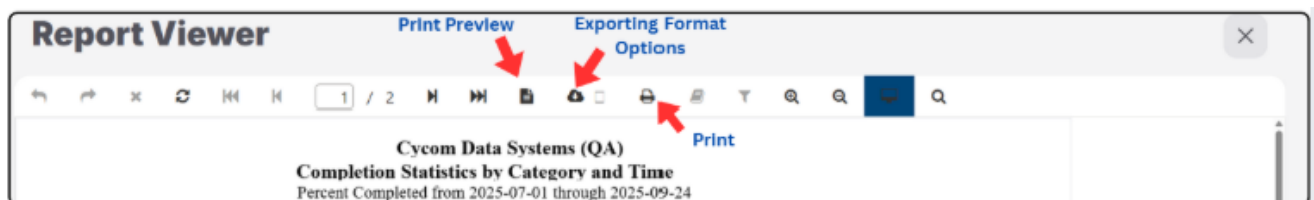
You may select one or more staff members from the list.



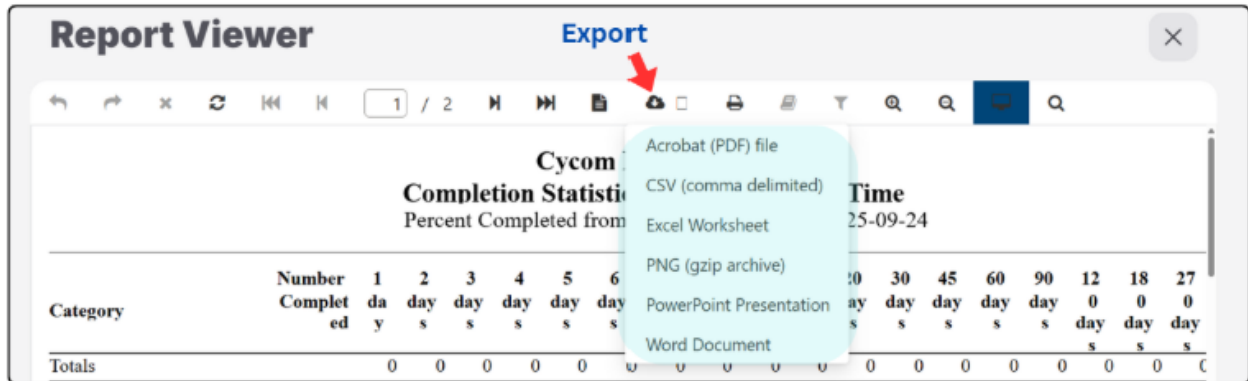
Once you make your selections and set your criteria for the report, click **Print**. A **Report Viewer** will be displayed.



Once the Report you selected has populated, you will be able to preview the report before printing by selecting **Print Preview**.



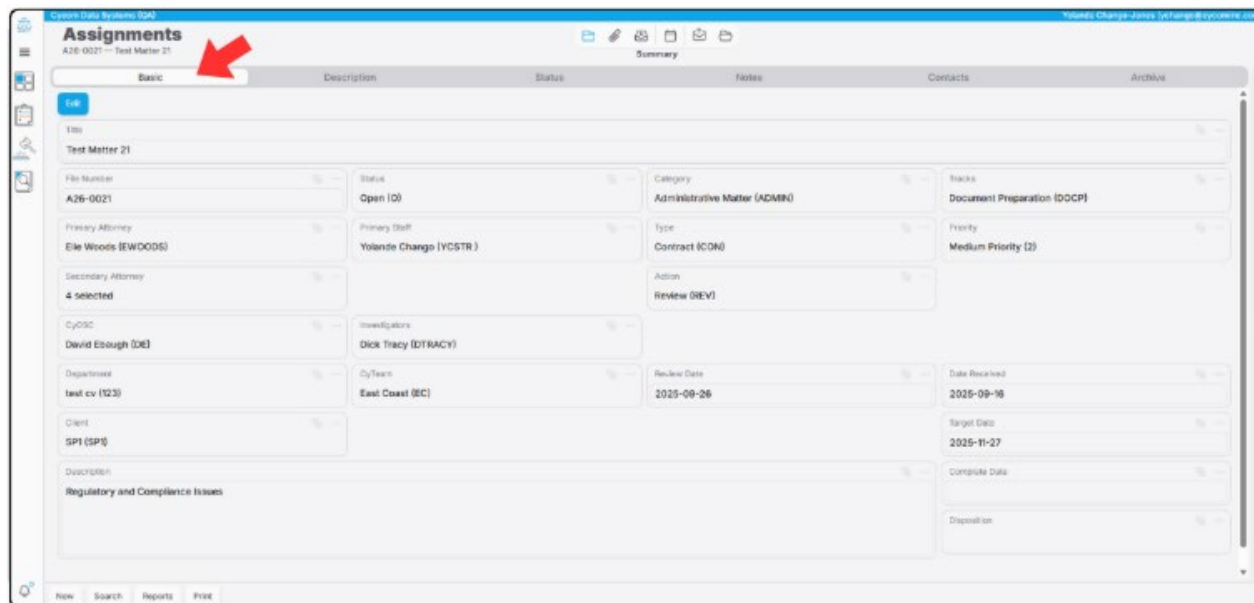
To export the file, click on the cloud icon **Export File**, then select the type of format you wish to export the report in, for example PDF, Word or other types. It will automatically download for you.



Assignments Basic Matter Data Fields

- **Basic Tab**
- **Description Tab**
- **Status Tab**
- **Notes Tab**
- **Contacts Tab**
- **Archive Tab**

Basic Tab



Title

A descriptive title for the matter.

File

The **CLNG Assignments** matter **File Number**. This will be auto generated upon selecting **Continue** when creating a new **Assignments** matter.

Attorney

The lead attorney on the matter.

Attorney 2

Additional attorneys on the matter. (NOTE: **CLNG** 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.

Client

the Client field identifies the **company, organization, or person** that your department is providing services for. If you are in an **assignment, task, or email import**, the Client field ensures the work gets tied to the **correct client's record** in the system. It's often linked to your city's/county's **master client list**, so the same **Client** name can be reused across different matters and assignments.

Description

A text field to enter a description of the matter. It will allow 1-2 GB of text data.

Status

The current state of the matter. Status codes are classified mainly 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 on the Dashboard view.

Primary Staff

The staff member assigned to assist the attorneys 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. The **Category field** is mainly used to:

1. **Classify** the nature of the assignment (for easier tracking/reporting).
2. **Filter or search** assignments quickly within a matter.
3. **Standardize workflows** (so everyone tags work consistently).

Type

Each category code has a subset of type codes. Some examples of type codes are Procurement, Licensing, Civil Rights, Personnel, and Zoning. This list depends on how your organization configured CLNG.

Key difference:

- Category is what “kind” of work (Memorandum, Advice, FOIA, etc.)
- Type is the exact task within that kind of work.

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.

Received Date

The date the matter was received.

Target Date

The target completion date for the matter.

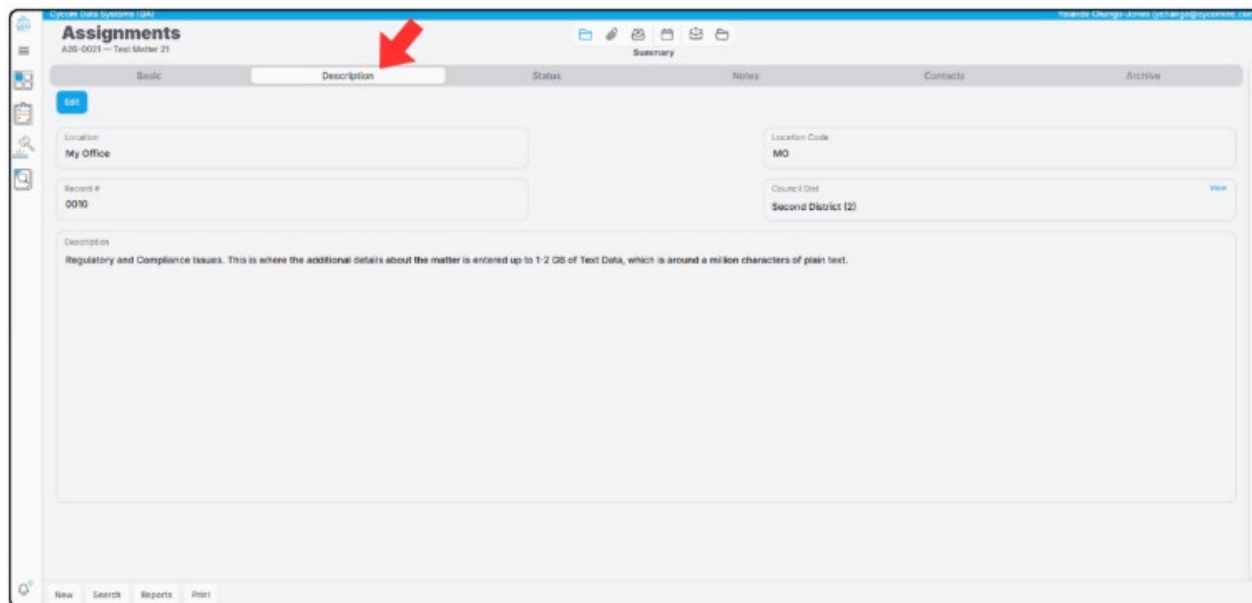
Complete Date

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. It is typically used as an internal reference code that ties the assignment to a physical or organizational location.

Location Number

the system's unique identifier for that specific assignment record. It is an auto-generated number created when a new assignment is saved. This number is what CLNG uses behind the scenes to track, retrieve, and link that assignment to related items (e.g., emails, notes, documents).

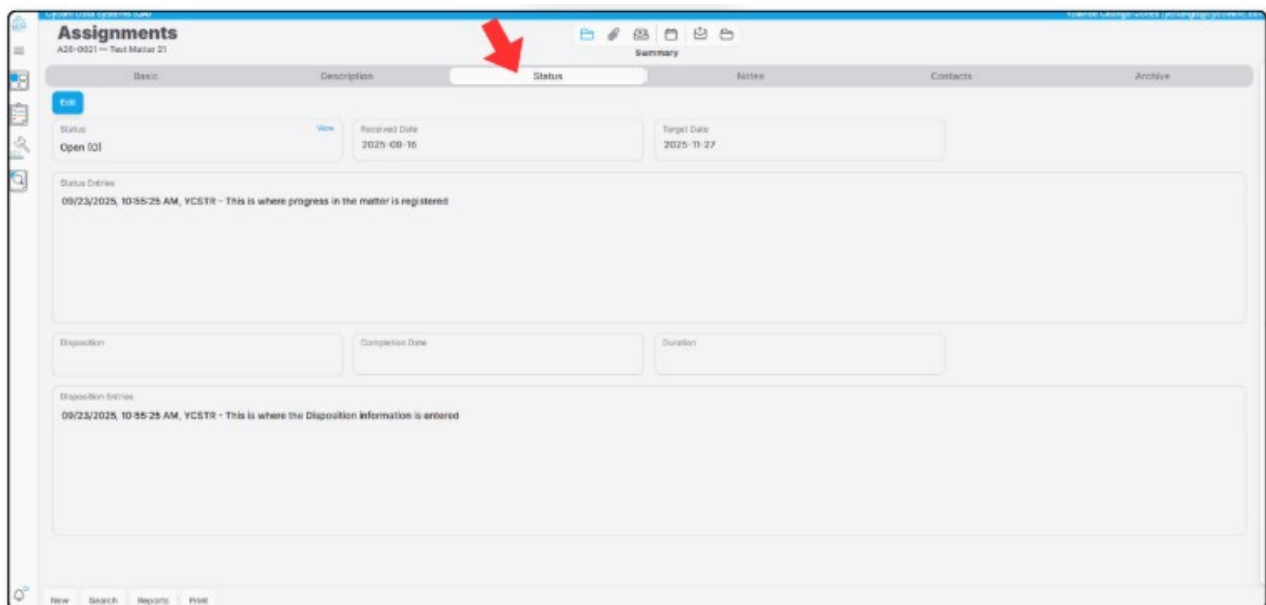
Council District

This field is used to capture the local government jurisdiction connected to the assignment.

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. The drop-down will offer options for Open, Close or other types.

Add Status Entry

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

Disposition

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

Completion Date

The date the matter was disposed.

Add Disposition Entry

An action button that opens the **Add Disposition Entry** window. The date and time and user code will be entered automatically, the user can enter the **Disposition** description.

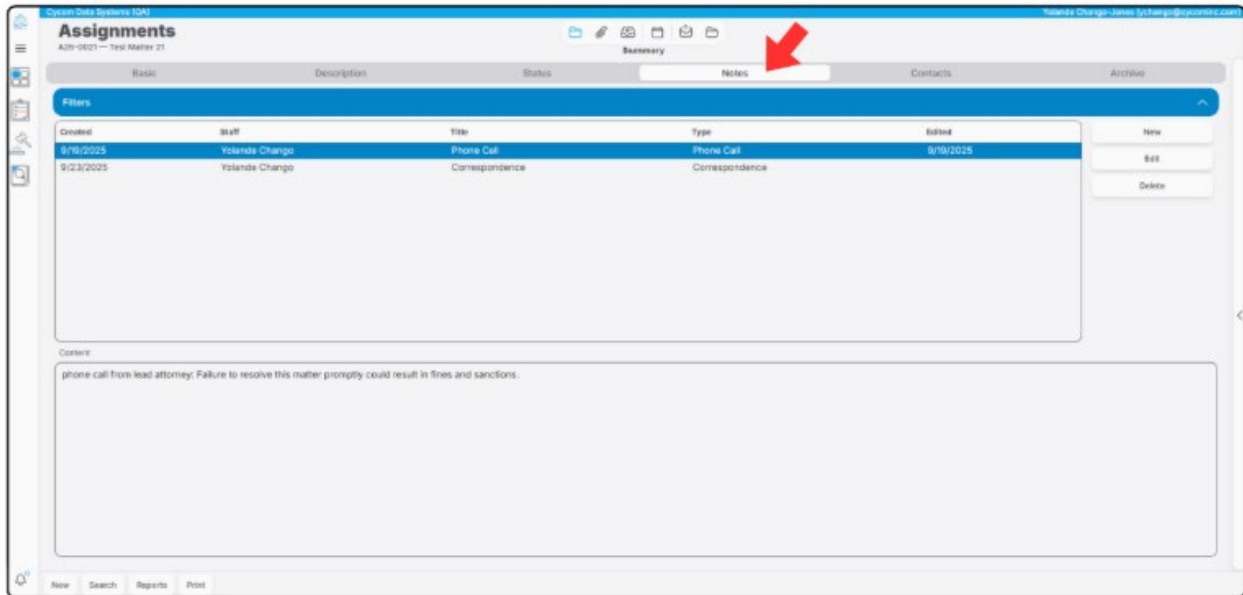
Find Text

An action button that opens a text search tool.

Spell Check

An action button that opens a spell-checking tool.

Notes Tab



The **Notes** tab displays a list of notes that can be sorted using the column headings and filtered using the filter options. Clicking once on a heading, i.e. **Created, Staff, Title, etc.** will list the notes in **Ascending** order by date, clicking a second time will list the notes in **Descending** order by date, clicking a third time will list them in the order they were originally created.

New

An action button that opens the window tool to create a **New Note**.

Edit

An action button that opens the window tool to **edit** a highlighted note.

Copy To

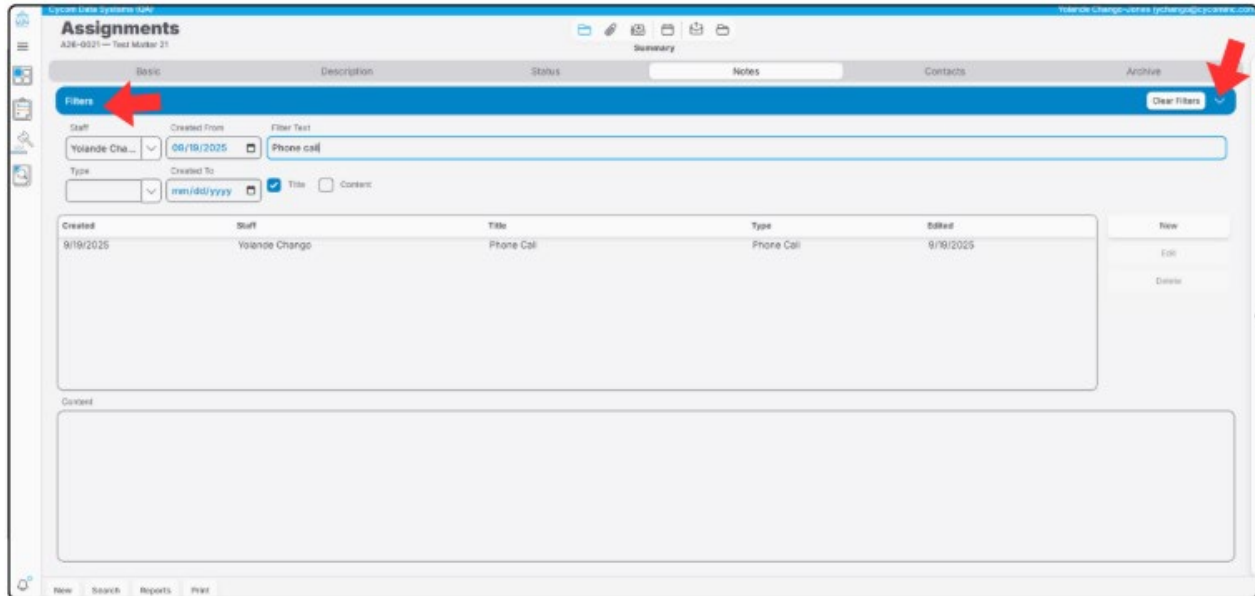
An action button that opens the **Select Matter** tool to select a matter to which a copy of the selected note will be attached. The original and copied note will exist separately in the database. Edits to one will not affect the other.

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.



Filters

An action button to filter the note list according to the parameters selected or entered. Click the arrow at the far right on the blue ribbon, a drop down window will appear with **filtering options**.

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.

Created From/To

Filter the notes according to a specific **date range**.

Filter Text

The text field to enter the filter terms found within the notes. The **Content** box below it must be checked when terms are entered in the Filter Text field.

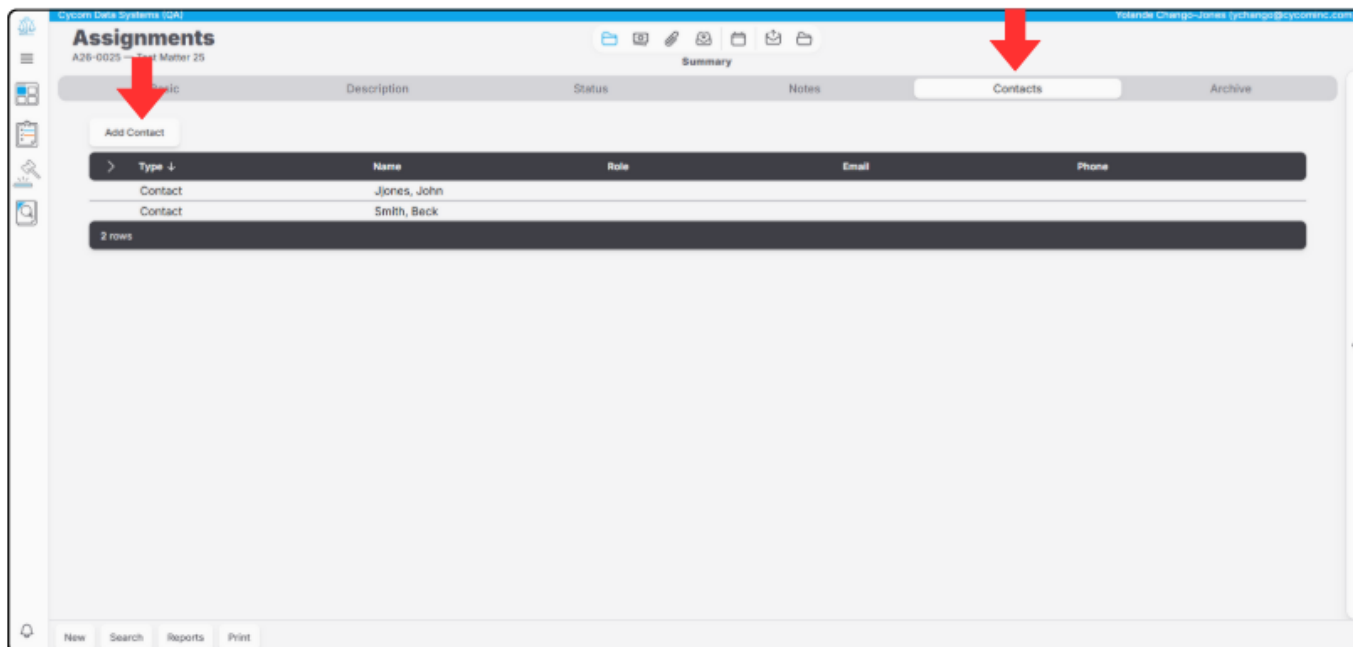
Title

To filter the notes by a specific **Title**, check this box. It may be checked with **Content** as well.

Content

To filter by terms found in the **Content** of the notes, used in conjunction with the **Filter Text** field and may be used with the **Title** selected as well.

Contacts Tab



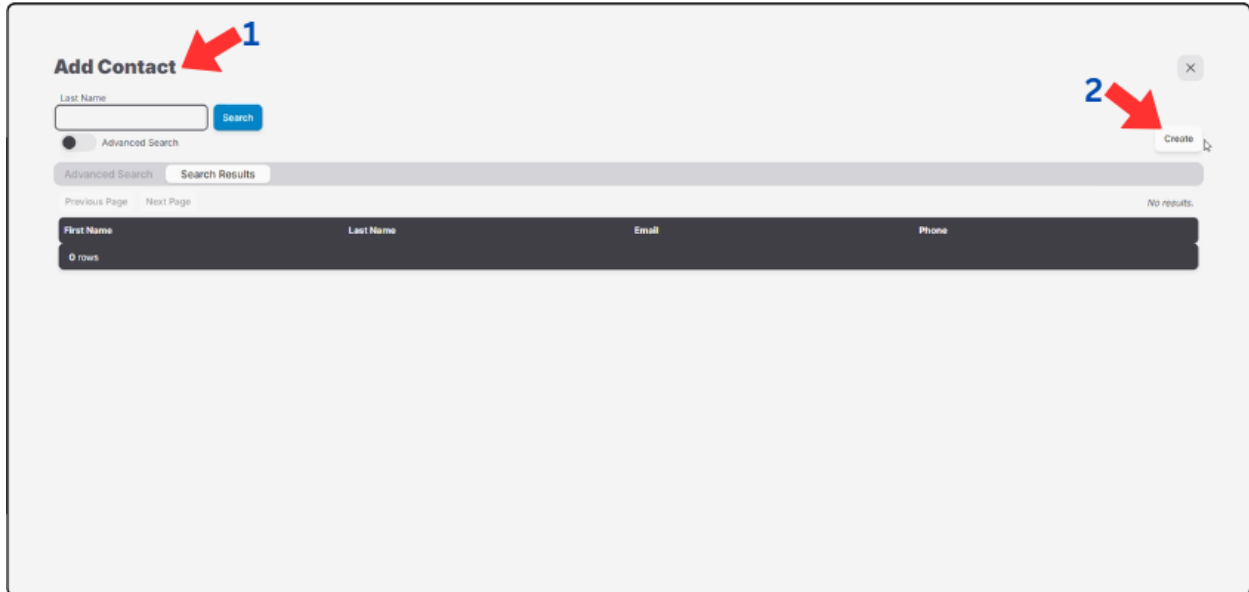
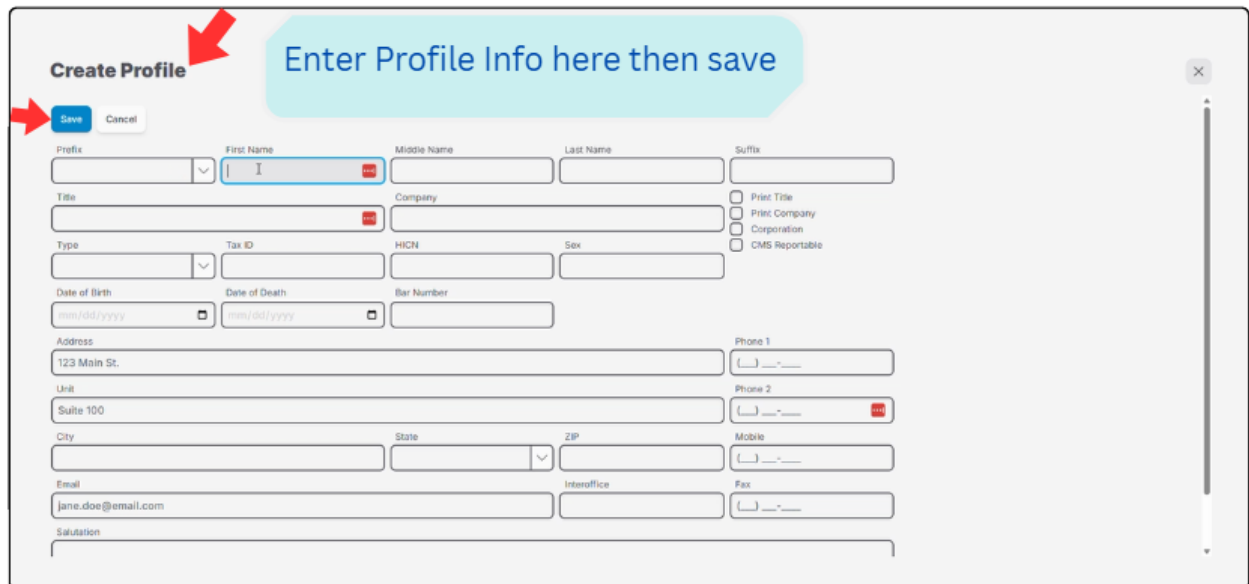
The screenshot displays the 'Assignments' module interface. At the top, there is a navigation bar with tabs for 'Summary', 'Notes', 'Contacts', and 'Archive'. The 'Contacts' tab is currently selected, indicated by a red arrow pointing to it. Below the navigation bar, there is a table with columns for 'Type', 'Name', 'Role', 'Email', and 'Phone'. The table contains two rows of contact information:

Type	Name	Role	Email	Phone
Contact	Jones, John			
Contact	Smith, Beck			

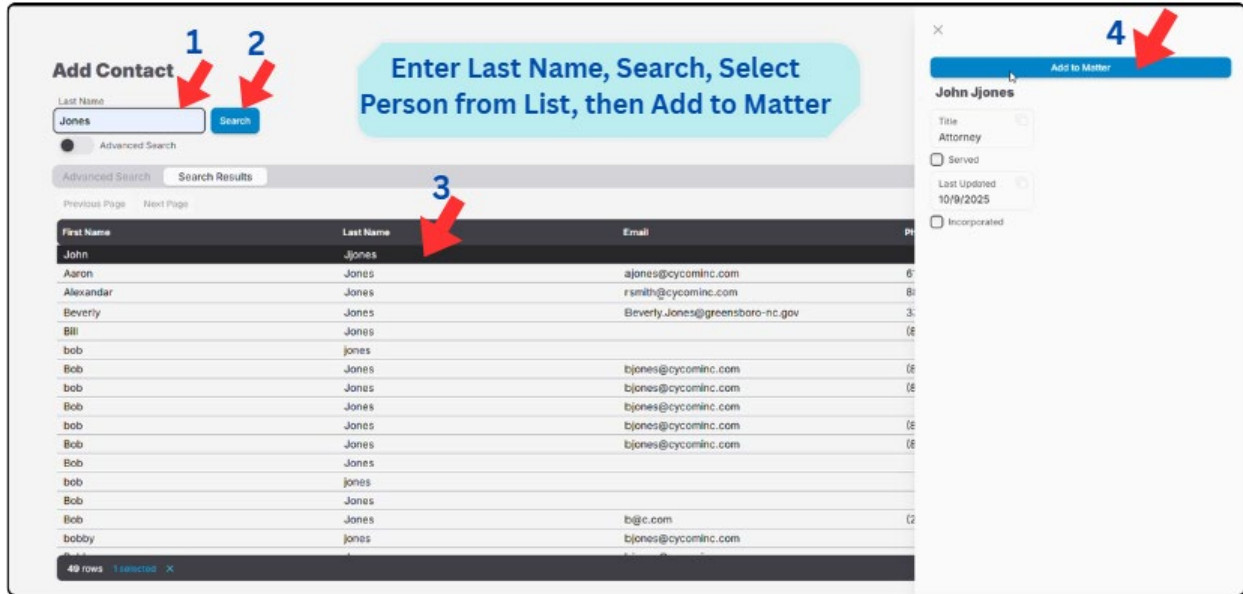
At the bottom of the interface, there are buttons for 'New', 'Search', 'Reports', and 'Print'.

Add Contact

An action button that opens the **Find a Person** tool to **Create** a new contact or **Search** for existing contacts.

To Search:



Add Contact

Last Name:

Advanced Search

Advanced Search Search Results

Previous Page Next Page

First Name	Last Name	Email	PH
John	Jones		
Aaron	Jones	ajones@cycominc.com	6
Alexandar	Jones	rsmith@cycominc.com	8
Beverly	Jones	Beverly.Jones@greensboro-nc.gov	3
Bill	Jones		6
bob	jones		6
Bob	Jones	bjones@cycominc.com	6
bob	Jones	bjones@cycominc.com	6
Bob	Jones	bjones@cycominc.com	6
bob	Jones	bjones@cycominc.com	6
Bob	Jones	bjones@cycominc.com	6
Bob	Jones		6
bob	jones		6
Bob	Jones		6
Bob	Jones		6
Bob	Jones	b@c.com	2
bobby	jones	bjones@cycominc.com	

49 rows 1 selected

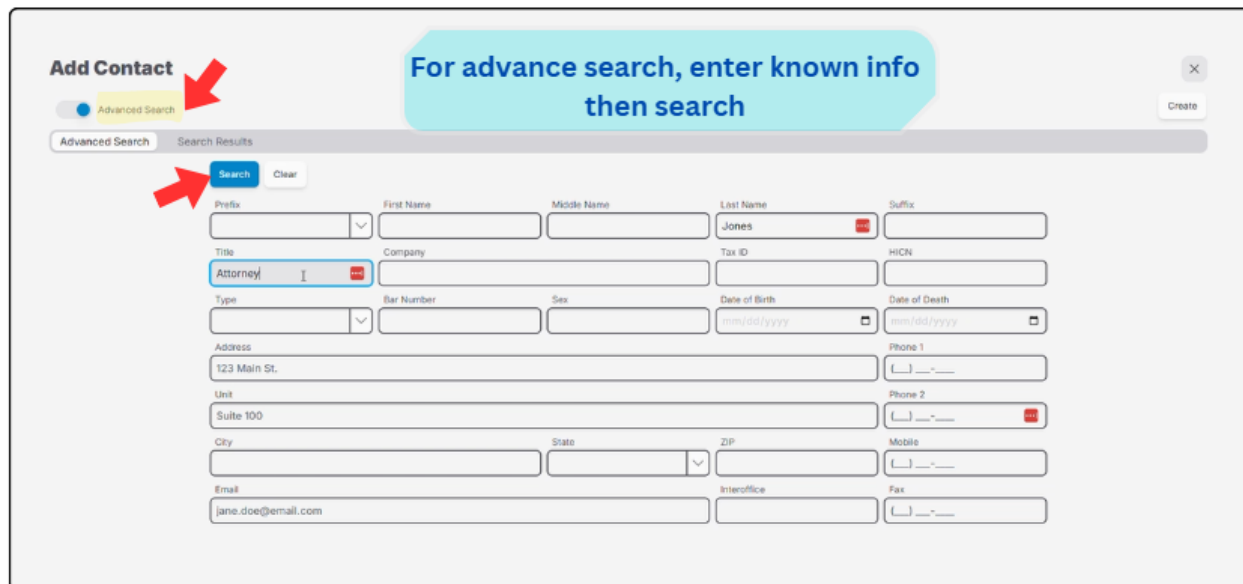
John J Jones

Title: Attorney

Served

Last Updated: 10/9/2025

Incorporated



Add Contact

Advanced Search

Advanced Search Search Results

Prefix:

First Name: Middle Name: Last Name: Suffix:

Title: Company: Tax ID: HICN:

Type: Bar Number: Sex: Date of Birth: Date of Death:

Address: Phone 1:

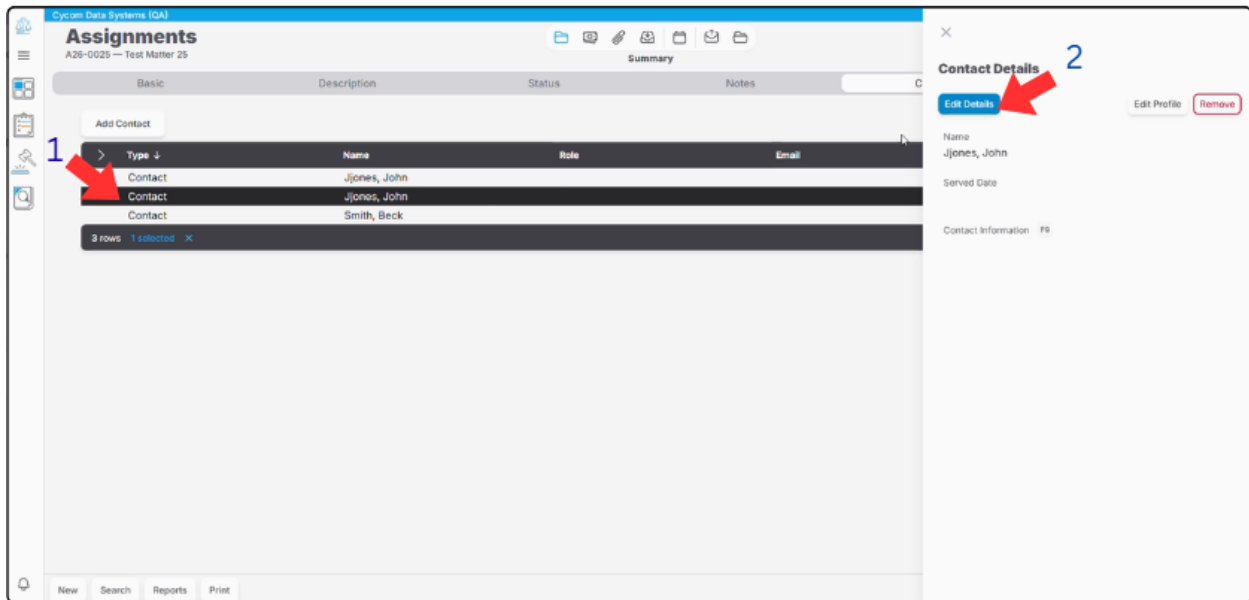
Unit: Phone 2:

City: State: ZIP: Mobile:

Email: Interoffice: Fax:

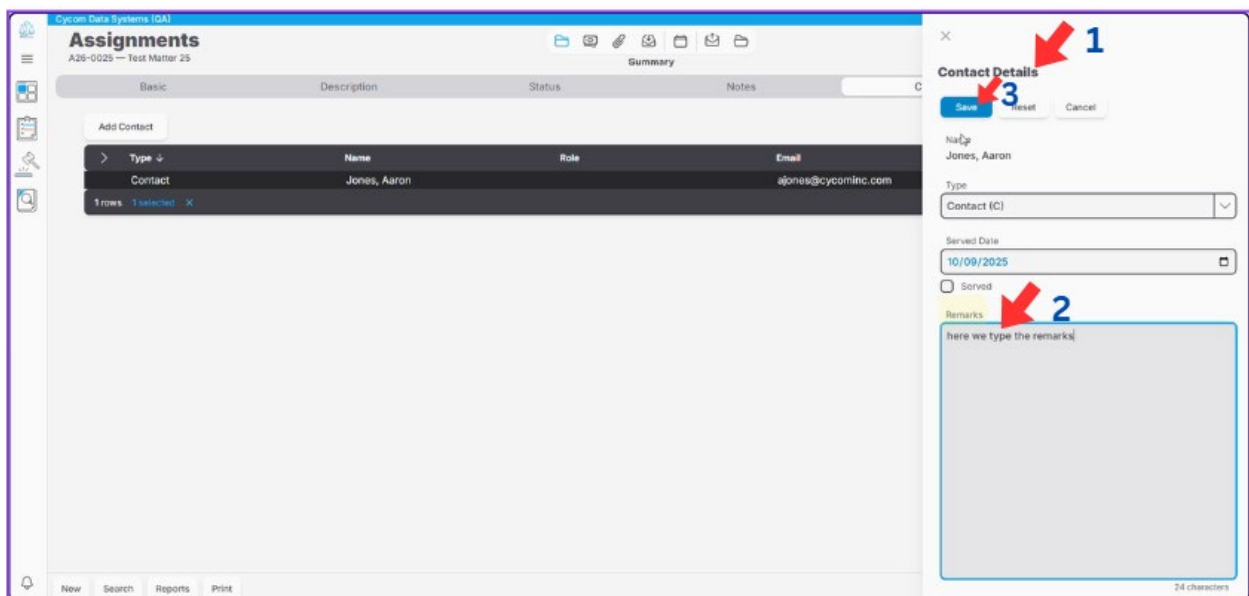
Edit Details

An action button that opens the **Edit Party** tool to edit information about a contact relevant to the matter. To access this function, select/highlight a contact first.



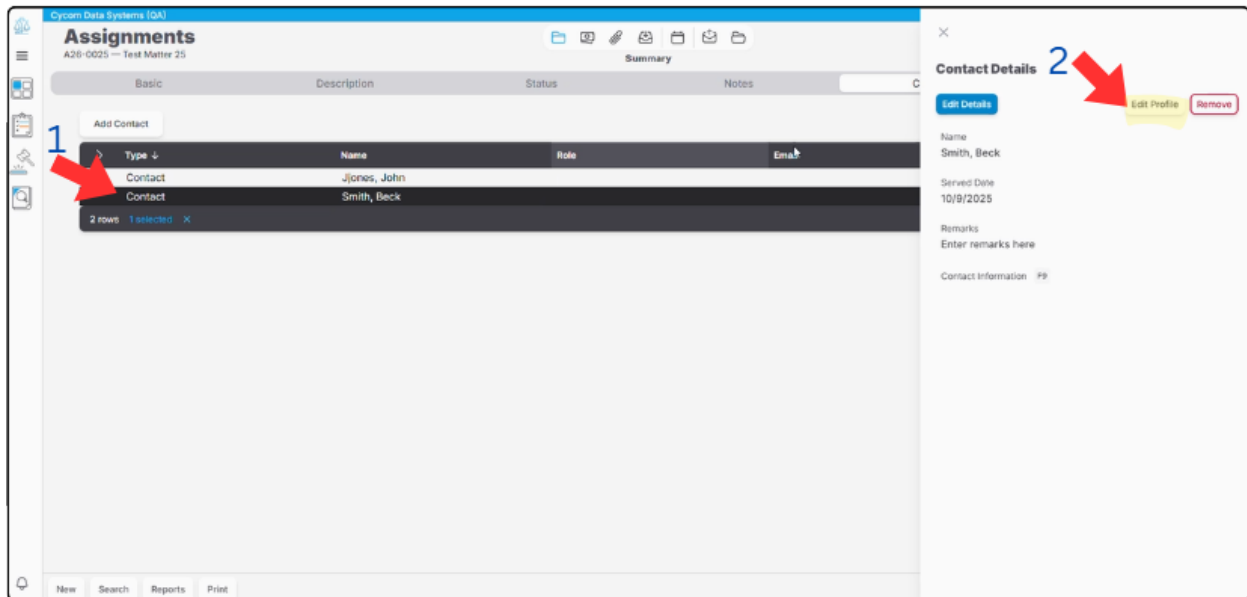
Remarks

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



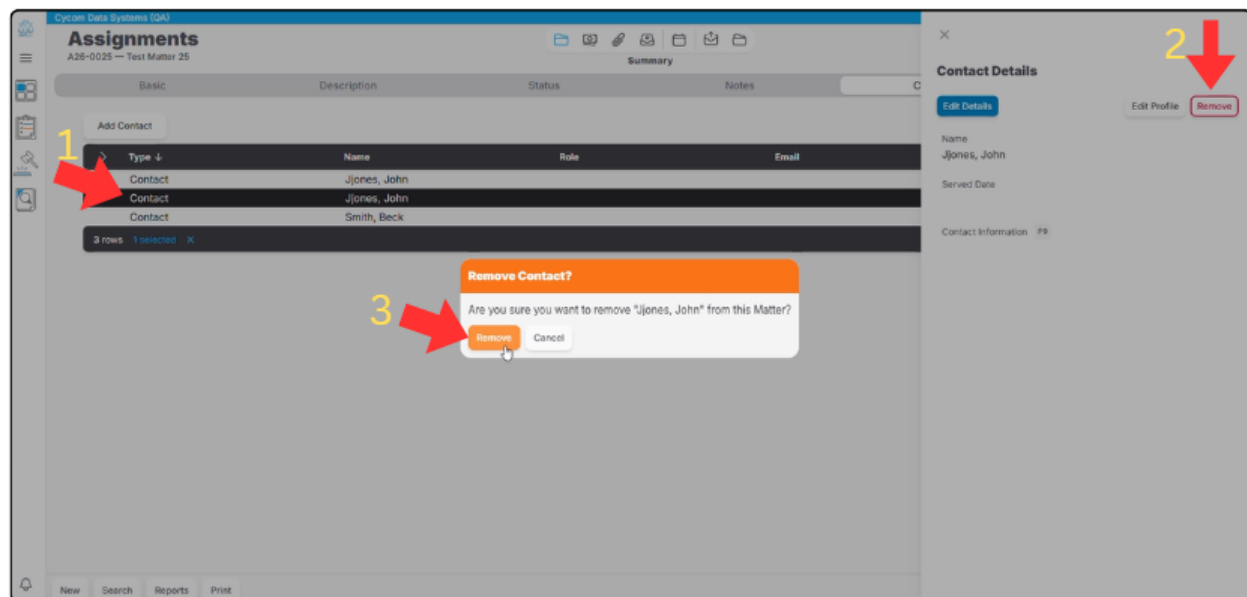
Edit profile

An action button that opens a profile window of the selected contact to edit. All edits within this window **will change the source information** and be applied throughout the application.

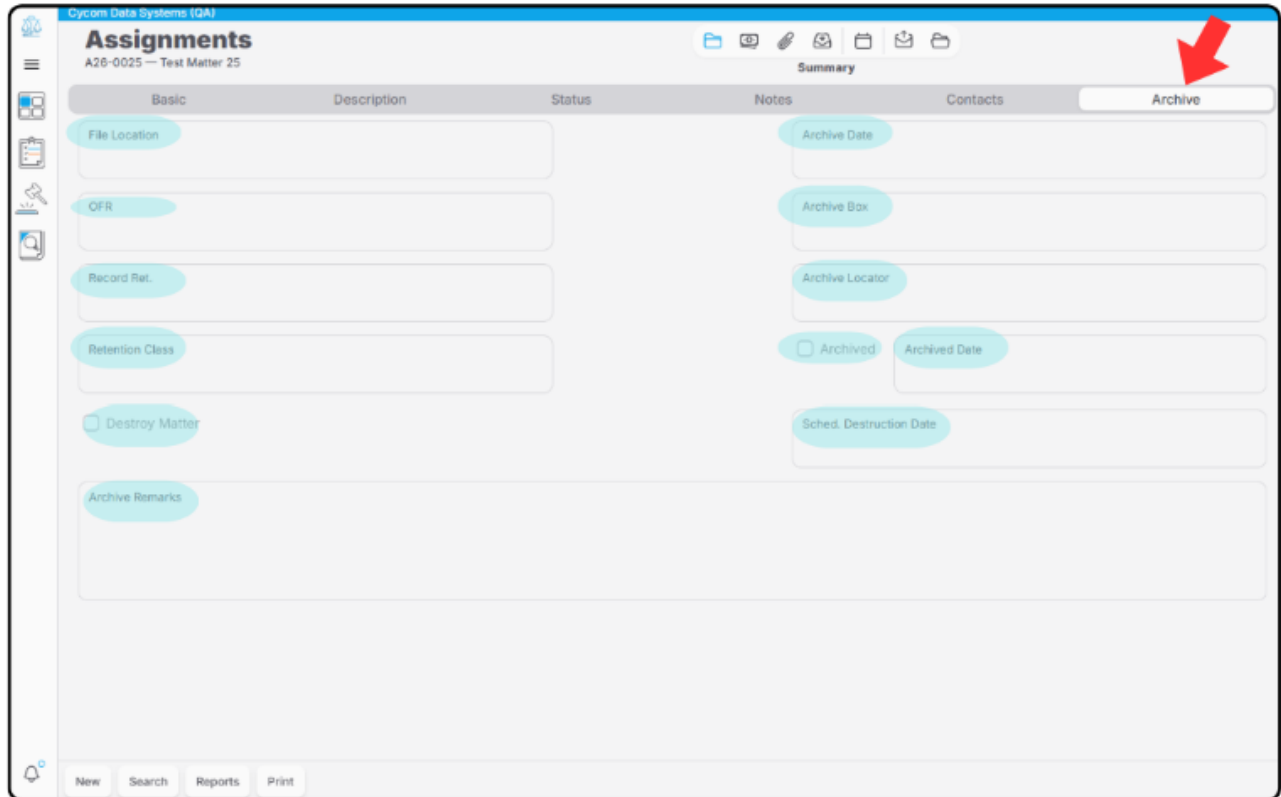


Remove

An action button that **Removes** the selected contact.



Archive Tab



The **Archive Tab** has fields to enter **File Location**, **Archival**, and **Scheduled Destruction** information. This will allow you to create a file management process, to attach or detach additional matters to a specific matter, and to locate an archived file quickly and efficiently.