

Need a Reminder? Use the [Quick Reference Guide](#).

Need more details? check out the [Standard Guide](#).

# Quick Reference Guide

There are 5 steps to completing this task:

1. [Open the Assignments Module.](#)
2. [Press New](#)
3. [In the New File Window, Press Auto.](#)
4. [In the New Assignments Entry Window, Fill Out All Mandatory Fields.](#)
5. [Press Save.](#)

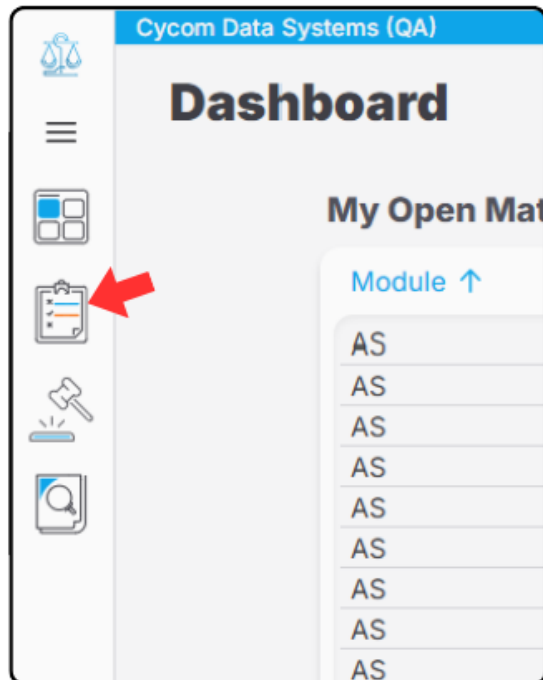
# Standard Guide

**Step 1. Open the Assignments module.**

There are 2 ways to open this module.

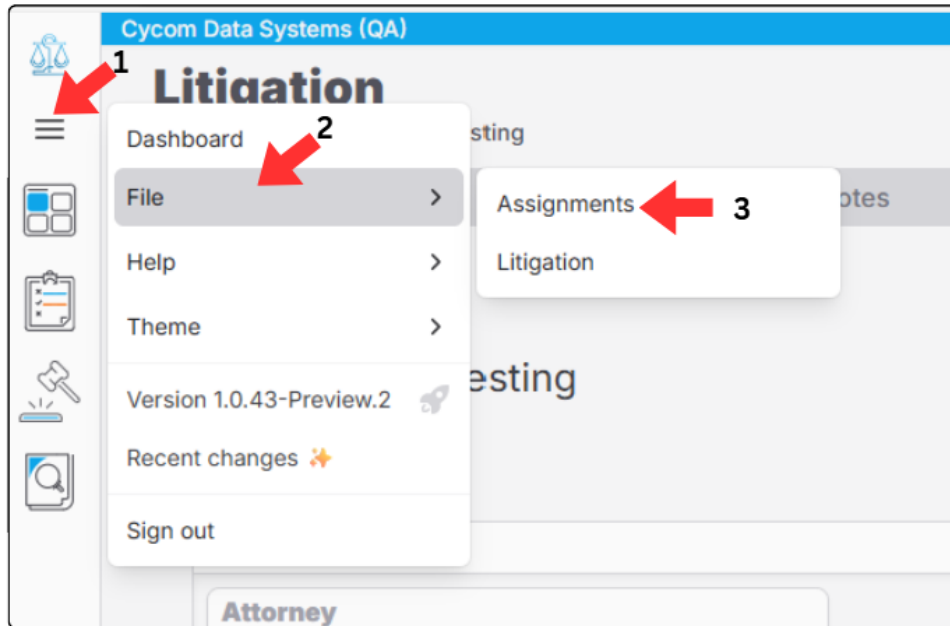
**1-Step Option:**

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



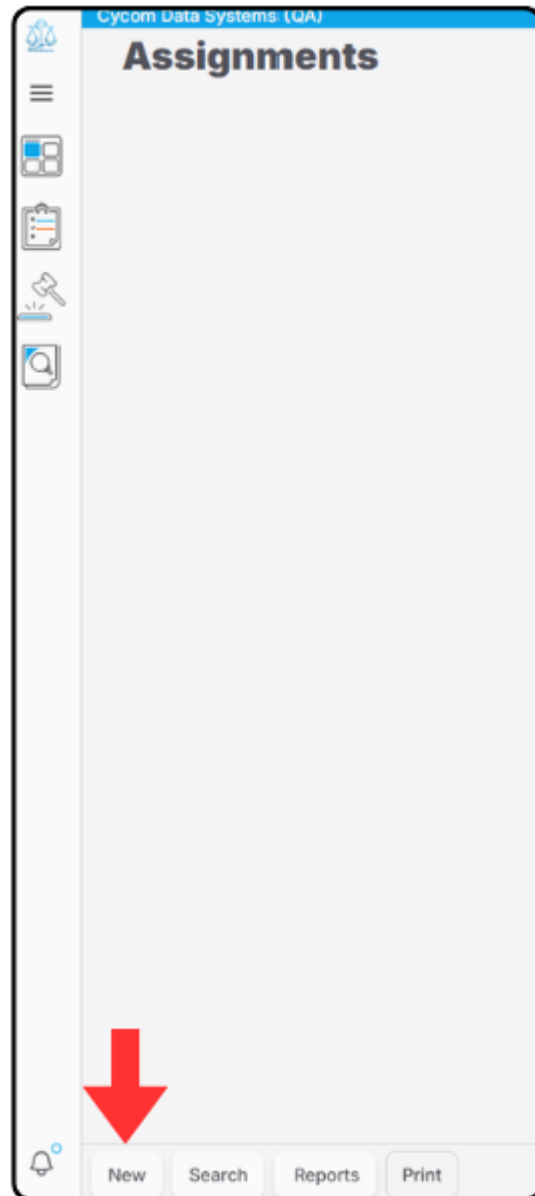
### 2-Step Option:

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



### Step 2. Press New.

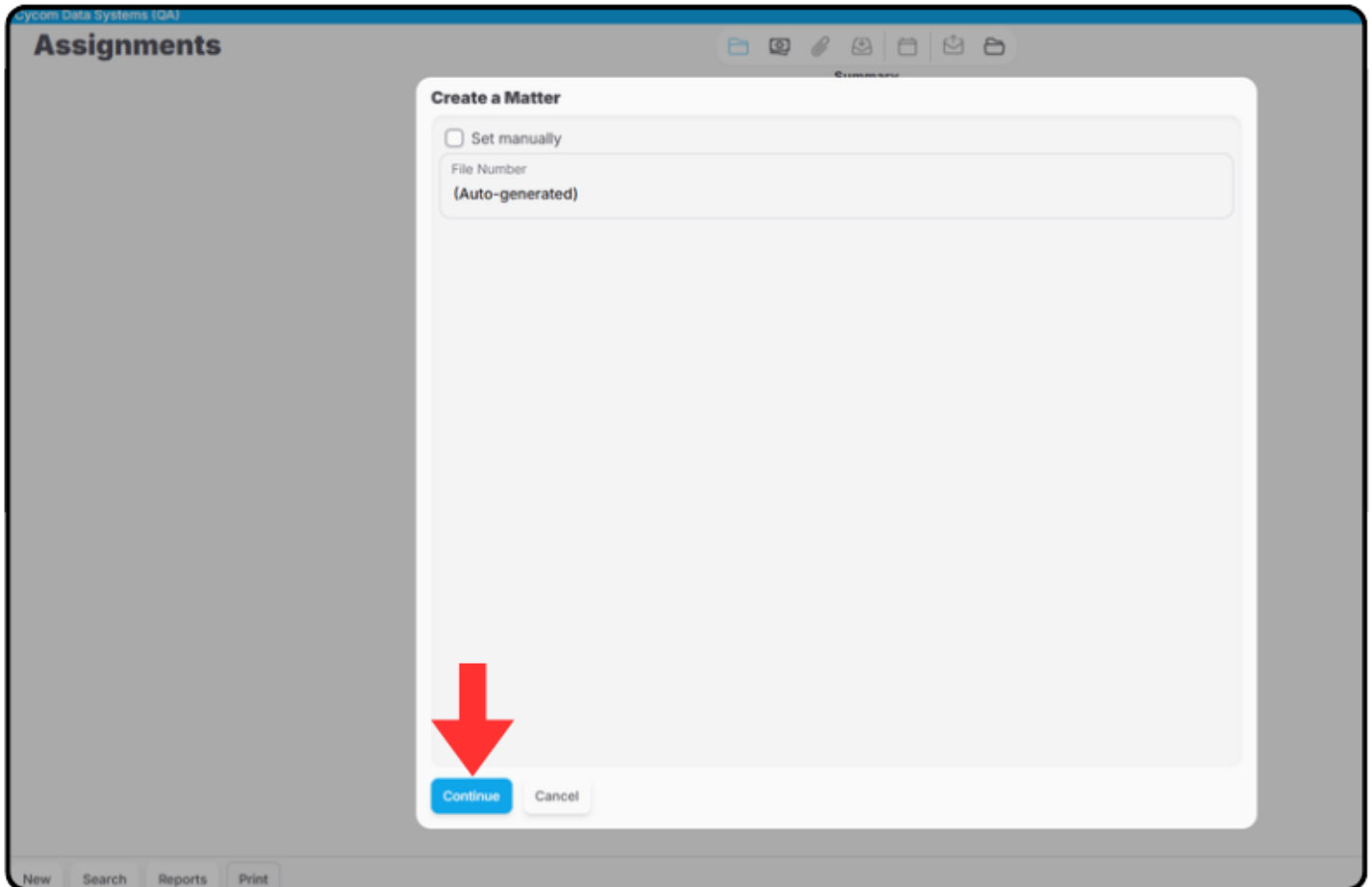
The **New** button is located in the bottom-left corner of the screen.



**Step 3. Press Continue in the New File window.**

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

## Create New Assignments Matter

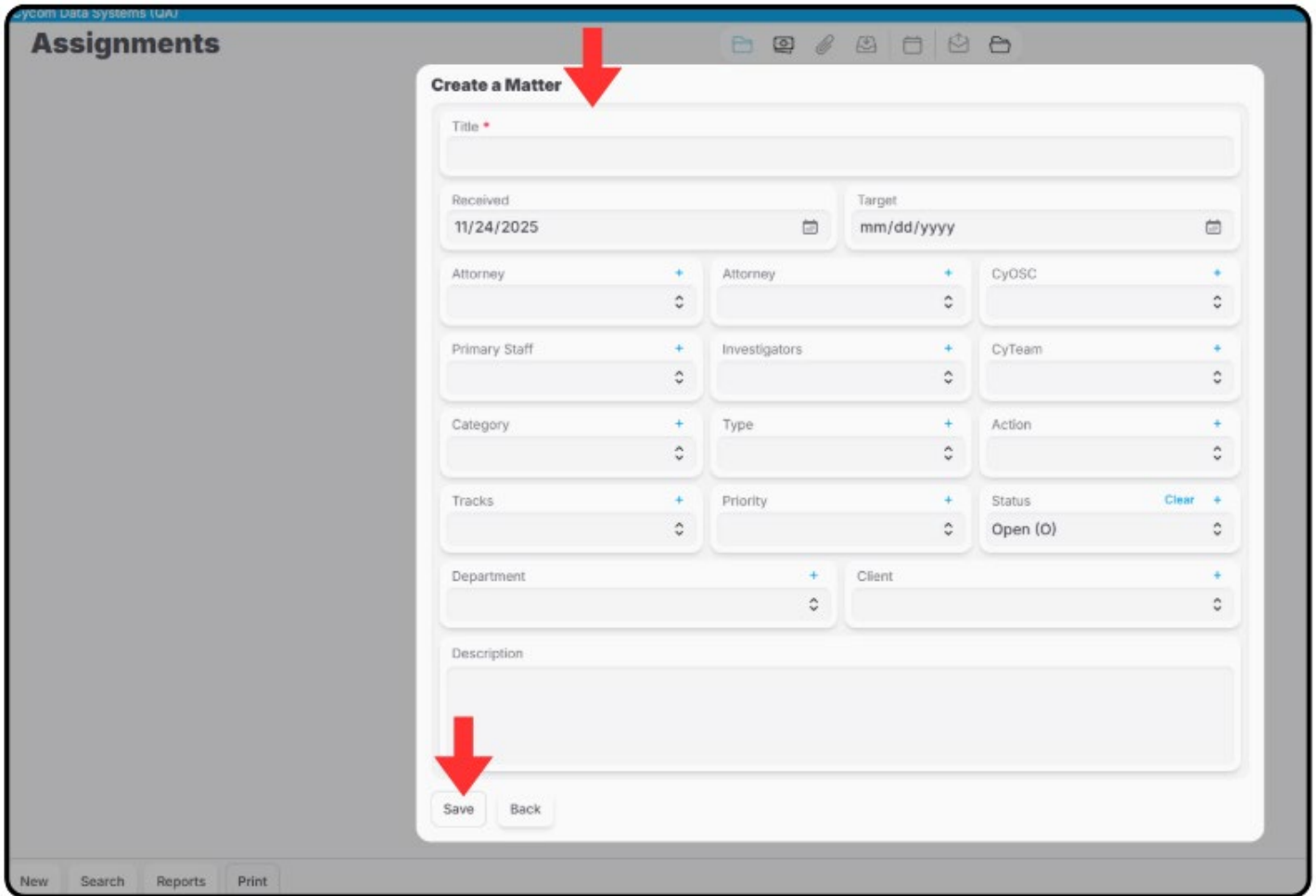


The screenshot shows the 'Assignments' window in the CYCOM Data Systems application. A 'Create a Matter' dialog box is open, featuring a 'Set manually' checkbox, a 'File Number (Auto-generated)' text field, and 'Continue' and 'Cancel' buttons at the bottom. A large red arrow points directly to the 'Continue' button.

**Step 4. Fill out the mandatory fields in the New Assignment Entry window.**

A **New Assignment Entry** window appears after you complete Step 3. Fill out the mandatory fields for the matter.

## Create New Assignments Matter



The screenshot displays the 'Assignments' module in the CYCOM Data Systems application. The 'Create a Matter' form is the central focus, featuring several input fields and dropdown menus. A red arrow points to the 'Title' field at the top. Below it are 'Received' (with a date of 11/24/2025) and 'Target' (with a date format of mm/dd/yyyy) fields. The form is organized into a grid of dropdown menus for 'Attorney', 'Primary Staff', 'Category', 'Tracks', 'Department', 'Investigators', 'Type', 'Priority', 'CyOSC', 'CyTeam', 'Action', 'Status' (with a 'Clear' link), and 'Client'. A large text area for 'Description' is located at the bottom of the form. At the very bottom of the form are 'Save' and 'Back' buttons. A second red arrow points to the 'Save' button. The interface includes a top navigation bar with icons and a bottom navigation bar with 'New', 'Search', 'Reports', and 'Print' buttons.

Looking for field descriptions?  
Check out the [New Assignment 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 a red asterisk (\*). The new assignment cannot be saved until values for these fields are provided. The word "**Required**" will appear in red if you try to save a new assignment without values in these fields.

You can navigate from field to field using tab and can cycle through drop-down lists with the up and down arrow keys. Using the **Shift + Tab** allows you to move backwards through the fields.



### Navigation Tip

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

**Step 5. Press Save.**

The **Save** button is located at the bottom-left corner of the **New Assignment Entry** window.

## Create New Assignments Matter

**Create a Matter**

Title \*

Received

11/25/2025

Target

mm/dd/yyyy

Attorney

+

⇅

Attorney

+

⇅

CyOSC

+

⇅

Primary Staff

+

⇅

Investigators

+

⇅

CyTeam

+

⇅

Category

+

⇅

Type

+

⇅

Action

+

⇅

Tracks

+

⇅

Priority

+

⇅

Status

Clear

+

Open (O)

⇅

Department

+

⇅

Client

+

⇅

Description

Save

Back

After saving, the **Basic Tab** of your new **Assignment** matter will appear.

## Create New Assignments Matter

Cycom Data Systems (QA) Yolande Chango-Jones (ychango@cycominc.com)

### Assignments

A26-0032 — 11 25 Test

**Basic** | Description | Status | Notes | Contacts | Archive

**Tab**

Title  
11 25 Test

File Number  
A26-0032

Status  
Open (O)

Category  
Advice (ADV)

Tracks

Primary Attorney  
Wyatt, Ben (BW)

Primary Staff  
Yolande Chango (YCSTR)

Type

Priority  
Medium Priority (2)

Secondary Attorney

Action  
Contact (CON)

CyOGC  
Jerry Seinfeld (JS)

Investigators

Department

CyTeam

Review Date

Date Received  
2025-11-25

Client

Target Date  
2026-01-25

Description  
<p>Description for contract review and advice</p>

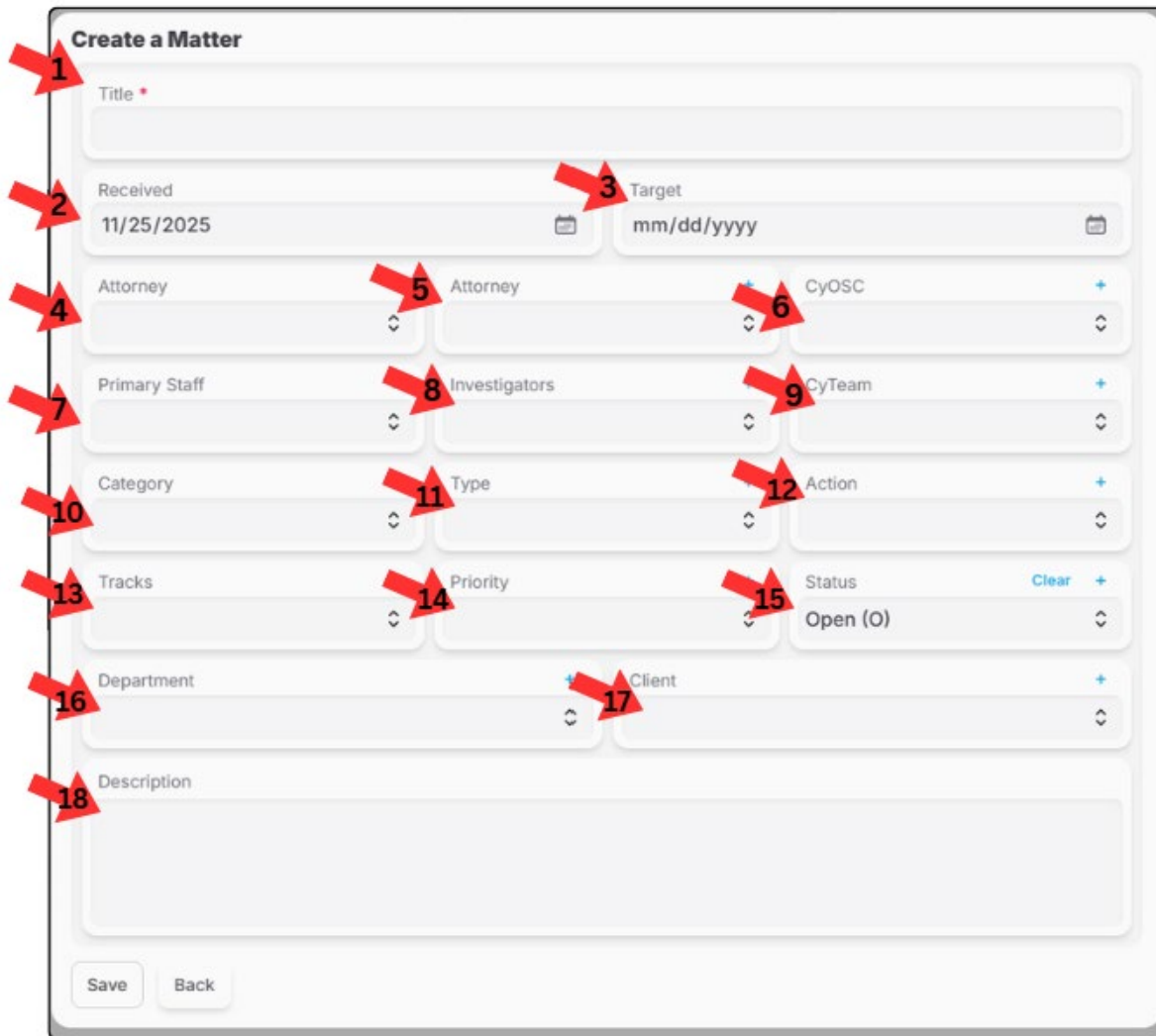
Complete Date

Disposition

New Search Reports Print

# New Assignment Entry Field Description Guide

1. Title
2. Received (Date)
3. Target (Date)
4. Primary Attorney
5. Secondary Attorney
6. Outside Counsel (OS Counsel)
7. Primary Staff
8. Investigators
9. Team
10. Category
11. Type
12. Action
13. Track
14. Priority
15. Status
16. Department
17. Client
18. Description



**Create a Matter**

1 Title \*

2 Received 11/25/2025 3 Target mm/dd/yyyy

4 Attorney 5 Attorney 6 CyOSC

7 Primary Staff 8 Investigators 9 CyTeam

10 Category 11 Type 12 Action

13 Tracks 14 Priority 15 Status Open (O)

16 Department 17 Client

18 Description

Save Back

The configuration of the CityLaw/CountyLaw NG 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 Assignment Entry window, please contact your System Administrator.

### 1. Title

The name of the new Assignment matter.

**This is a mandatory field.**

### 2. Received (Date)

The date the assignment was received. The value will default to the current date.

**This is a mandatory field.**

### 3. Target (Date)

The estimated date the assignment will be completed. Entering a Target Date will automatically place it on the calendar.

### 4. Primary Attorney

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

### 5. Secondary Attorney

An additional attorney, if applicable. (accommodates up to four attorneys)

### 6. Outside Counsel (OS Counsel)

Outside Counsel used on the assignment.

### 7. Primary Staff

The staff to whom the assignment was given, or the staff responsible for managing the entry of this assignment.

### 8. Investigators

The investigator/s used on the assignment.

### 9. Team

The Team responsible for the assignment. The label of this field is customizable.

### 10. Category

Category codes separate assignments into classifications relevant to your office. Some examples of Categories are Contracts, Ordinances, Opinions, and Resolutions.

**Best Practices recommend that this be a mandatory field, but it is a site-specific decision.**

### 11. Type

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

### 12. Action

Action codes describe the service to be performed by the Attorneys or Staff member on the assignment matter (e.g. Review, Prepare, Attend, Advice).

**13. Track**

This is a customizable label.

**14. Priority**

The priority assigned to this matter.

**15. Status**

The current state of the matter (e.g. Open, Closed, Pending).

**This is a mandatory field.**

**17. Department**

The Department field represents the entity to whom the services of the Assignment are being rendered.

**This is a mandatory field.**

**16. Client**

This is a customizable label, usually used to associate with your Finance Department's accounting structure.

**19. Description**

This is a description of the nature of the assignment for the purpose of understanding its scope and aiding in future searches for this or similar assignments.