



## CLNG Training Notes Litigation Module

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These notes are provided by **Cycom Data Systems, Inc.** to support the use of **CityLaw / CountyLaw Next Generation (CLNG)** 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**.

### Contents:

#### Litigation Basic Actions

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

#### Litigation Report Options

- Create Built-in Reports

#### Litigation Basic Matter Data Fields

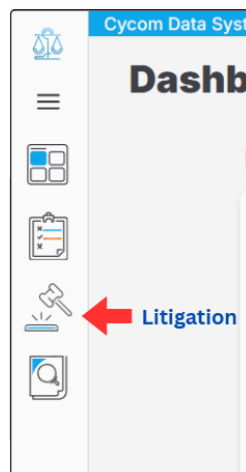
- Overview Tab
- Description Tab
- Notes Tab
- Evaluation Tab

## Litigation Basic Actions

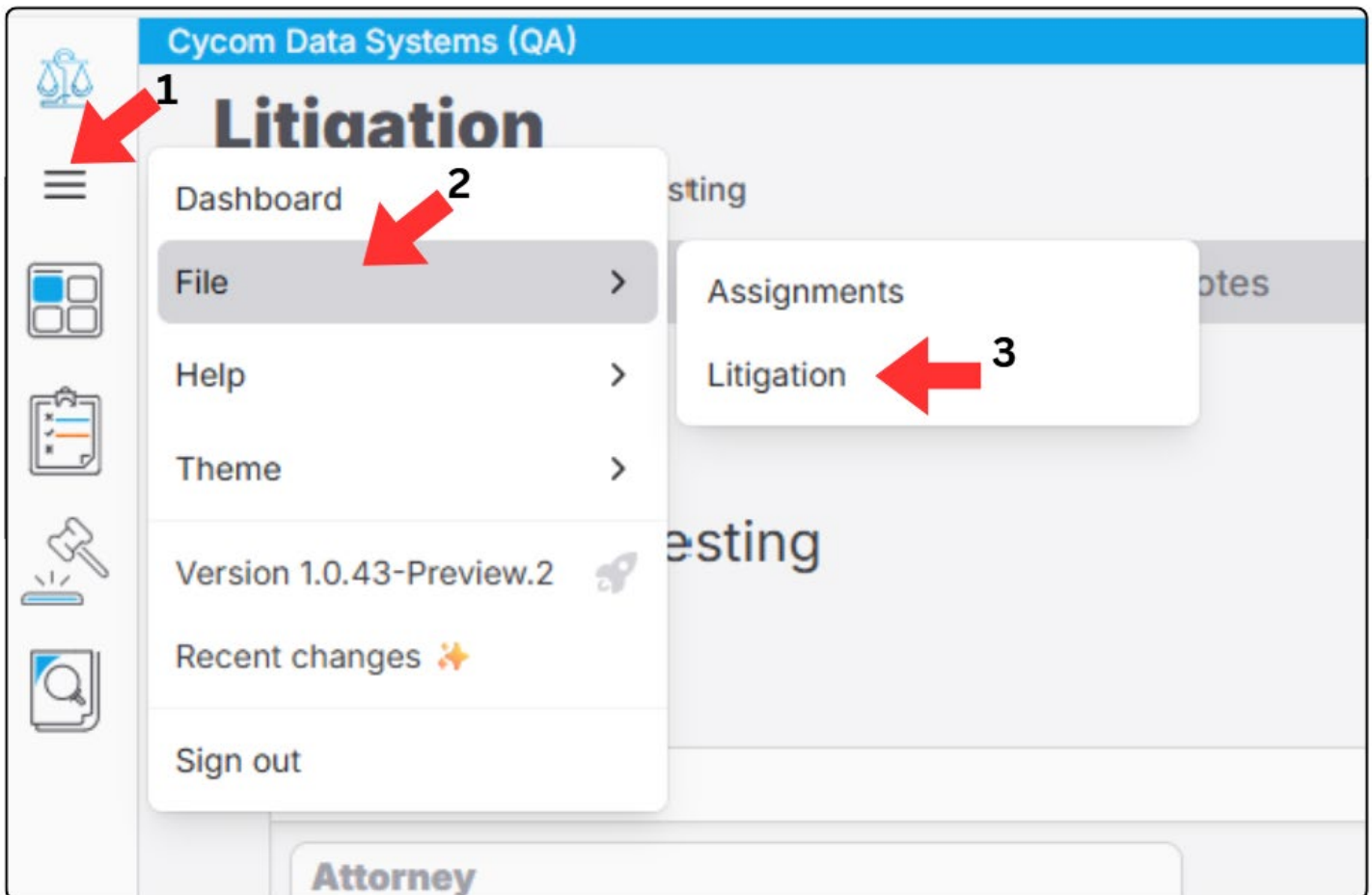
- [Open the Litigation Module](#)
- [Create a New Litigation Matter](#)
- [Find a Litigation Matter](#)
- [Close a Litigation Matter](#)

### Open the Litigation Module

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



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



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

ycom Data Systems (QA) Yolande Chango-Jones (ychango@cyc

### Dashboard

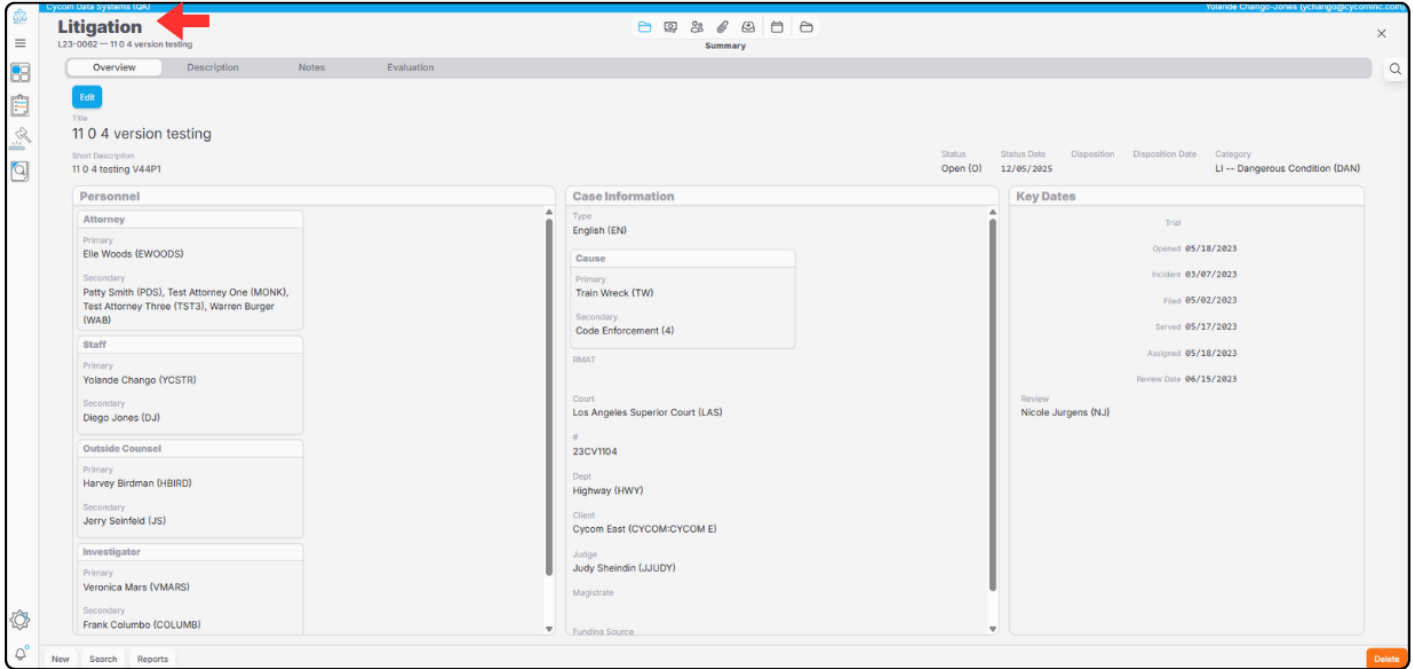
#### My Open Matters

Module ↑	File Number	Title
AS	A26-0006	Smith, Edward - Personal Injury Case
AS	A26-0007	Doe Corporation - Contract Dispute
AS	A26-0013	Personal Injury
AS	A26-0018	Adding Test Files
AS	A26-0019	Matter for Testing
AS	A26-0020	Test Matter 20
AS	A26-0021	Test Matter 21
AS	A26-0022	Test Matter 22
AS	A26-0023	Test Matter 23
AS	A26-0024	Test Matter 24
AS	A26-0025	Test Matter 25
LI	L23-0062	11 0 4 version testing

12 Rows

**Open Litigation Matter** (with red arrow pointing to the LI row)

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



**Litigation**  
L23-0082 — 11 0 4 version testing

Overview | Description | Notes | Evaluation | Summary

**Title**  
11 0 4 version testing

**Short Description**  
11 0 4 testing V44P1

**Status** Open (O) | **Status Date** 12/05/2025 | **Disposition** | **Disposition Date** | **Category** LI -- Dangerous Condition (DAN)

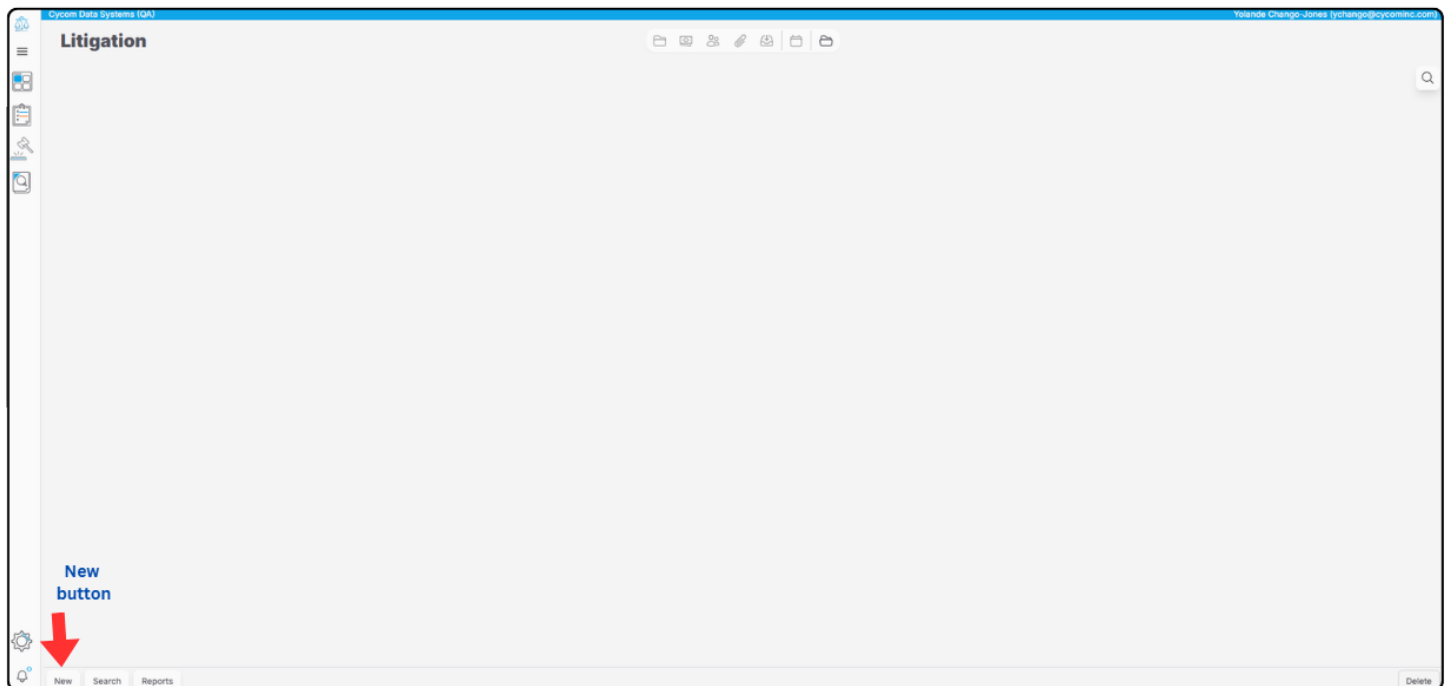
Personnel	Case Information	Key Dates
<b>Attorney</b> Primary: Ele Woods (EWOODS) Secondary: Patty Smith (PDS), Test Attorney One (MONK), Test Attorney Three (TST3), Warren Burger (WAB)	<b>Type</b> English (EN) <b>Cause</b> Primary: Train Wreck (TW) Secondary: Code Enforcement (4) <b>RMAT</b>  <b>Court</b> Los Angeles Superior Court (LAS) <b>#</b> 23CV104 <b>Dept</b> Highway (HWY) <b>Client</b> Cycom East (CYCOM:CYCOM E) <b>Judge</b> Judy Sheindin (JJUDY) <b>Magistrate</b>  <b>Funding Source</b>	<b>Trial</b> Opened 05/18/2023 Incident 03/07/2023 Filed 05/02/2023 Served 05/17/2023 Assigned 05/18/2023 Review Date 06/15/2023 <b>Review</b> Nicole Jurgens (NJ)

Personnel categories: Attorney, Staff, Outside Counsel, Investigator.

Buttons: New, Search, Reports, Done

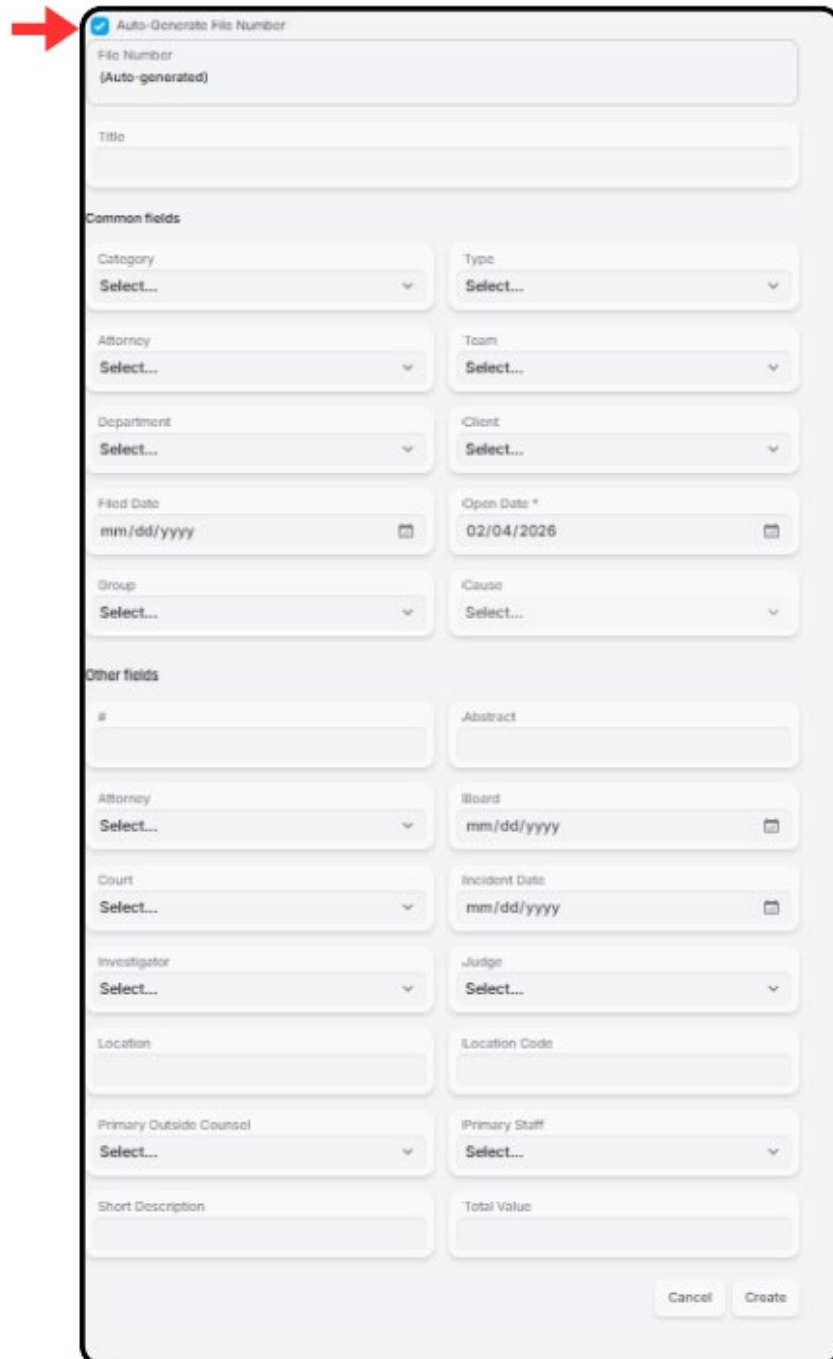
### Create a New Litigation Matter

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



A **New Litigation Entry** window appears. **Leaving the Auto-Generate File Number checked** will automatically generate a **File Number** for the new matter in accordance with the naming convention of our office. Uncheck the box if you wish to enter a file number manually.

Enter the matter information into the **Create a Matter** window.



Auto-Generate File Number

File Number  
(Auto-generated)

Title

Common fields

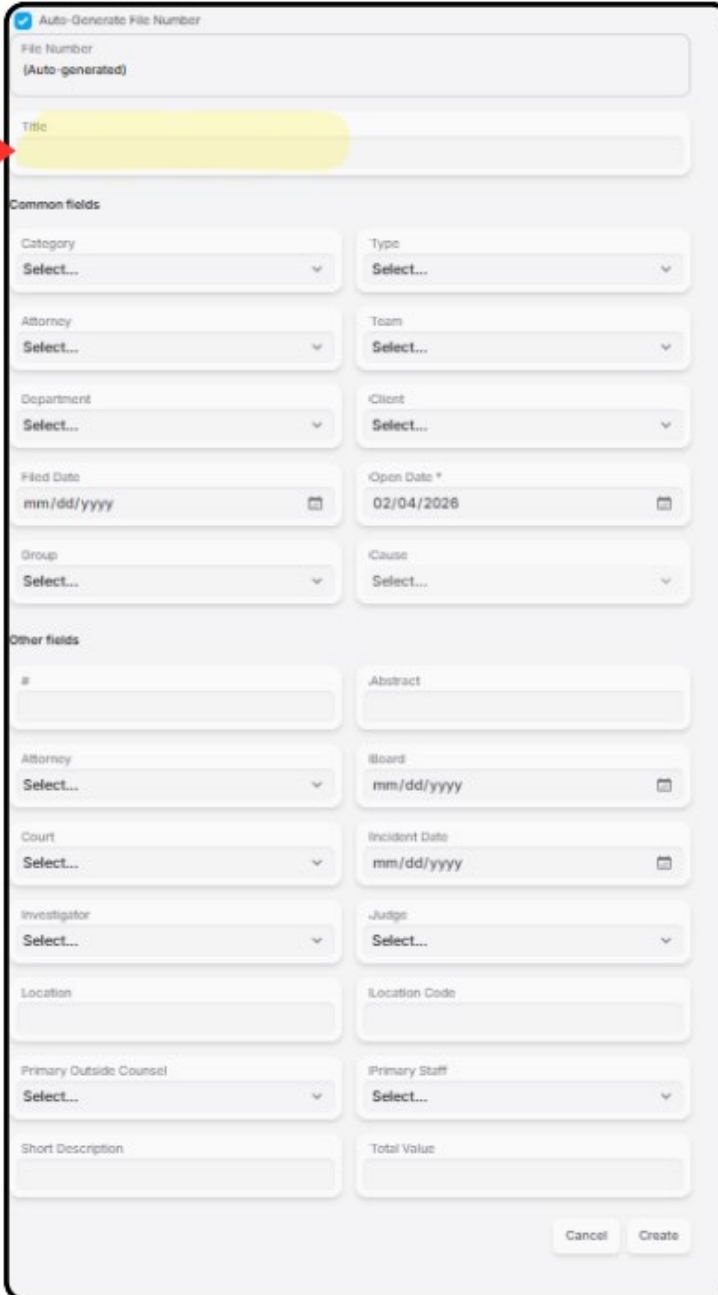
Category Select...	Type Select...
Attorney Select...	Team Select...
Department Select...	Client Select...
Filed Date mm/dd/yyyy	Open Date * 02/04/2026
Group Select...	Cause Select...

Other fields

#	Abstract
Attorney Select...	Board mm/dd/yyyy
Court Select...	Incident Date mm/dd/yyyy
Investigator Select...	Judge Select...
Location	Location Code
Primary Outside Counsel Select...	Primary Staff Select...
Short Description	Total Value

Cancel Create

Enter the matter information into the **New Litigation Entry** window. The Title field is required and any other fields as needed or predetermined by the System Administrator.



Auto-Generate File Number

File Number  
(Auto-generated)

**Title**

**Common fields**

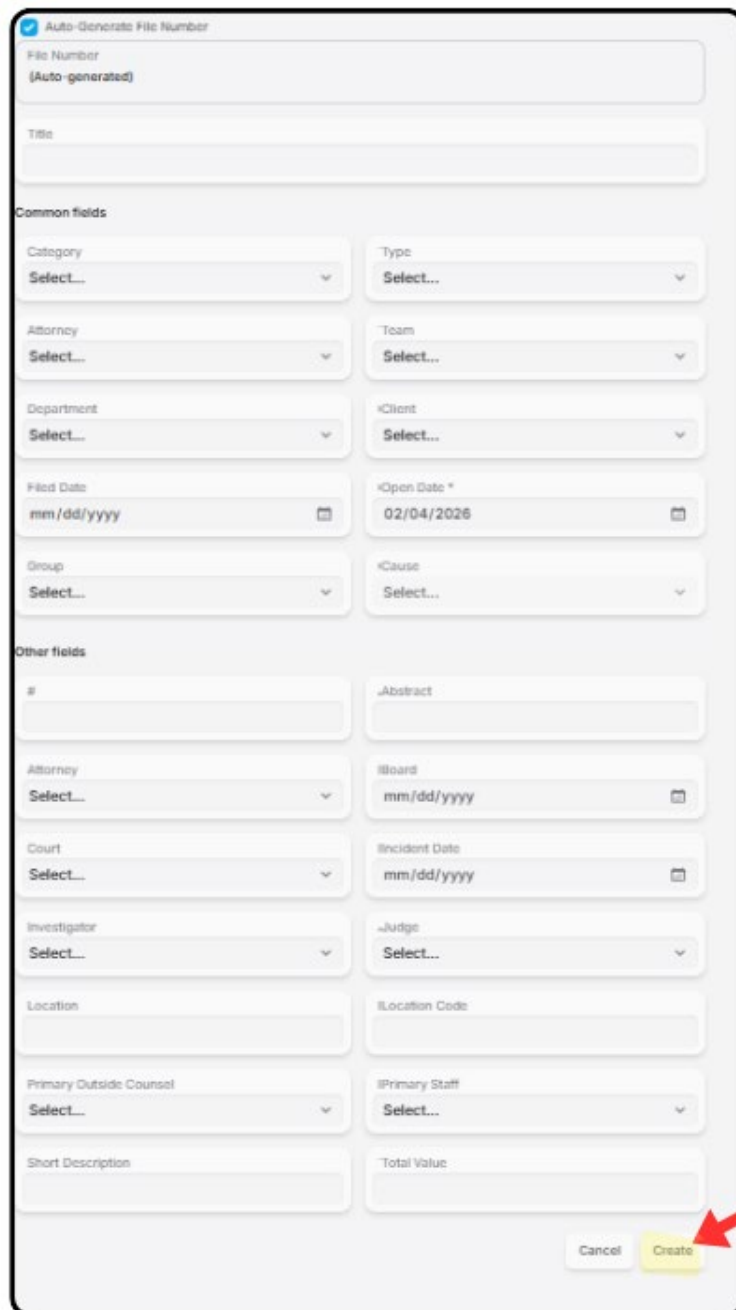
Category Select...	Type Select...
Attorney Select...	Team Select...
Department Select...	Client Select...
Filed Date mm/dd/yyyy	Open Date * 02/04/2026
Group Select...	Cause Select...

**Other fields**

#	Abstract
Attorney Select...	Board mm/dd/yyyy
Court Select...	Incident Date mm/dd/yyyy
Investigator Select...	Judge Select...
Location	Location Code
Primary Outside Counsel Select...	Primary Staff Select...
Short Description	Total Value

Cancel Create

Once you've entered the relevant data into the fields, select the **Create** button at the bottom left corner to save the Data.

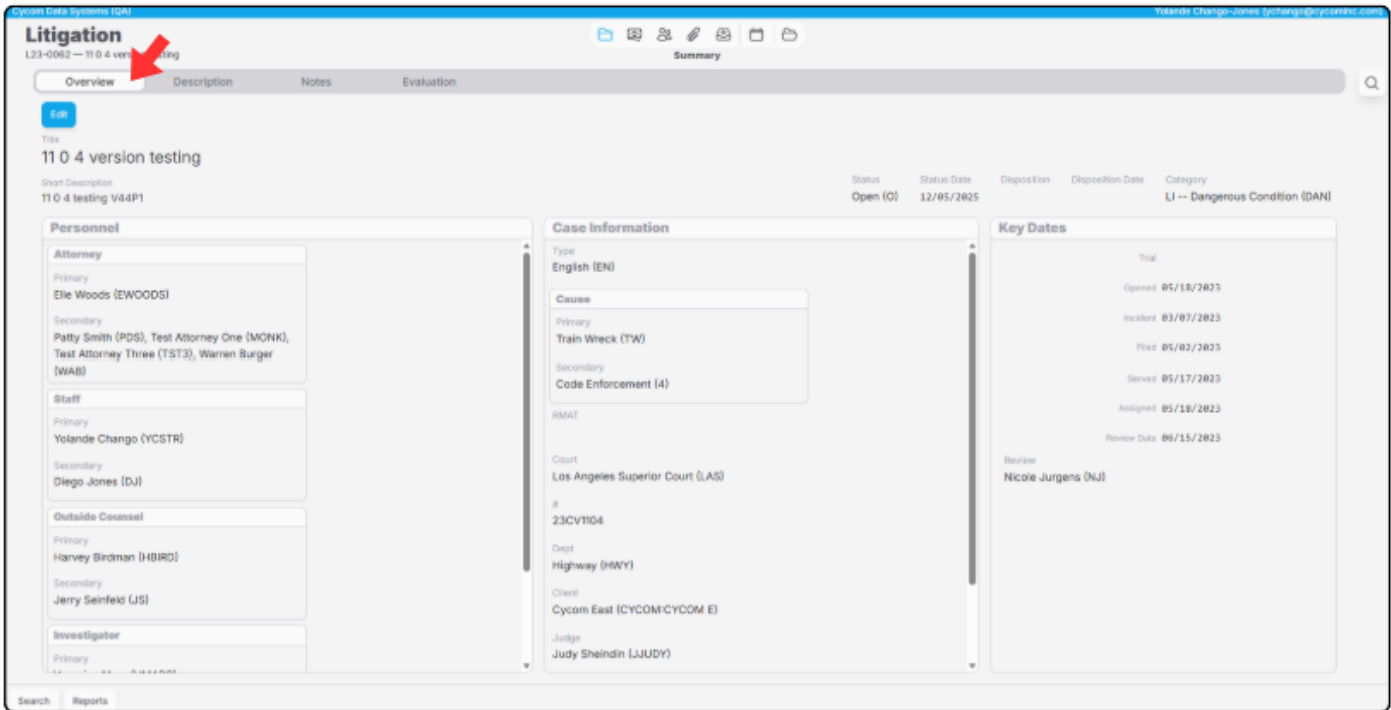


The screenshot shows a form titled "Auto-Generate File Number" with the following fields:

- File Number (Auto-generated)
- Title
- Common fields:**
  - Category (Select...)
  - Type (Select...)
  - Attorney (Select...)
  - Team (Select...)
  - Department (Select...)
  - Client (Select...)
  - Filed Date (mm/dd/yyyy)
  - Open Date \* (02/04/2026)
  - Group (Select...)
  - Cause (Select...)
- Other fields:**
  - #
  - Abstract
  - Attorney (Select...)
  - Board (mm/dd/yyyy)
  - Court (Select...)
  - Incident Date (mm/dd/yyyy)
  - Investigator (Select...)
  - Judge (Select...)
  - Location
  - Location Code
  - Primary Outside Counsel (Select...)
  - Primary Staff (Select...)
  - Short Description
  - Total Value

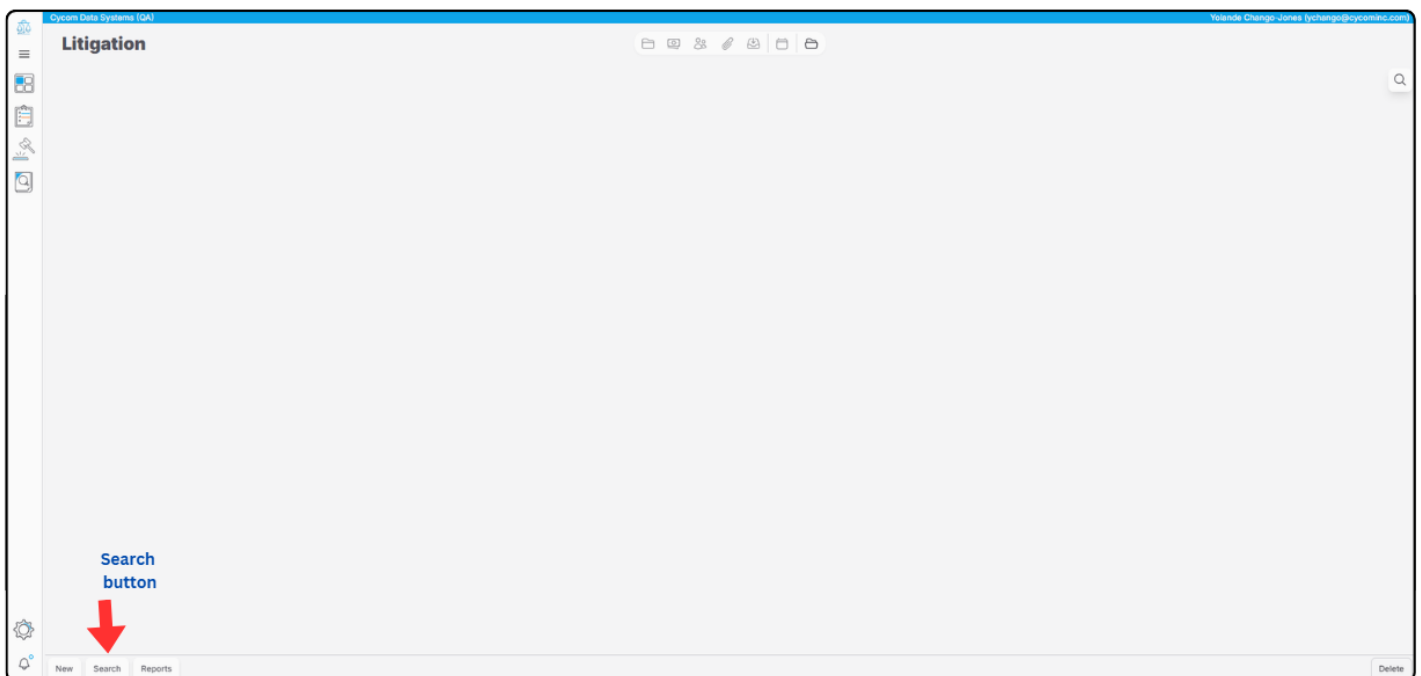
At the bottom right, there are two buttons: "Cancel" and "Create". A red arrow points to the "Create" button.

Your new matter will open. By default, it will be displayed in the **Overview Tab**.

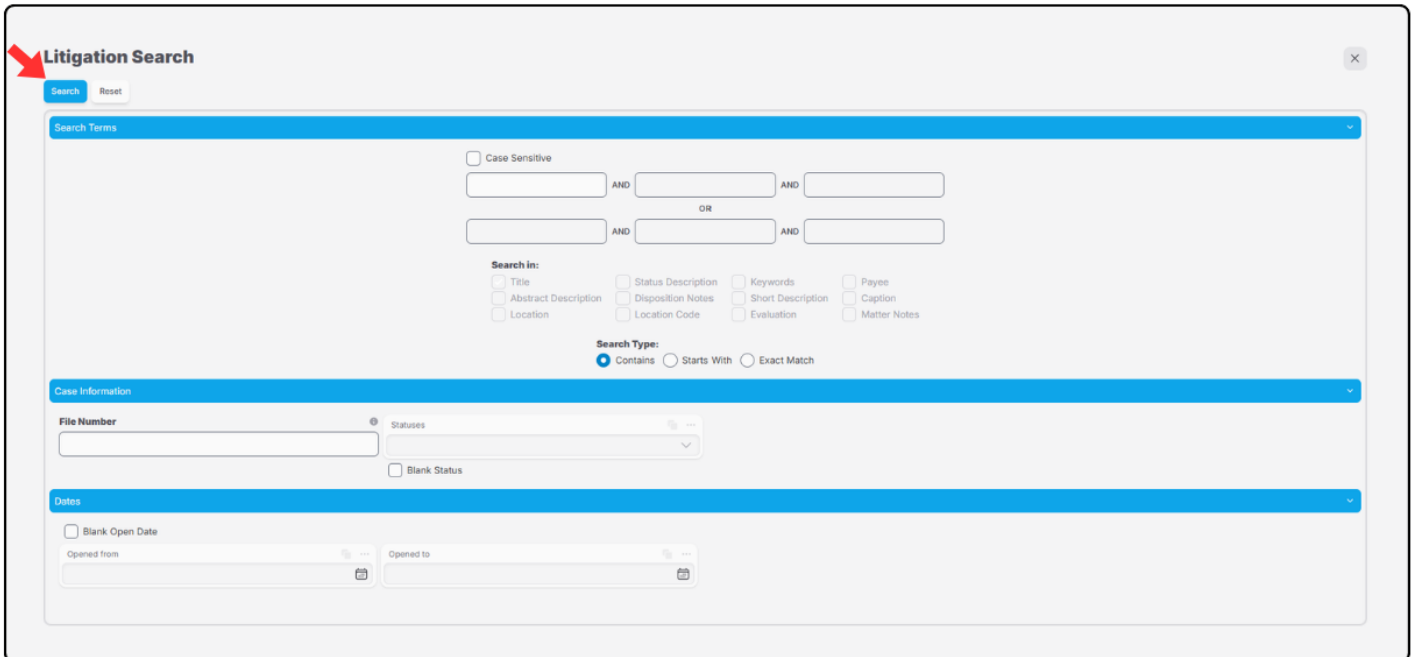


### Find a Litigation Matter

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



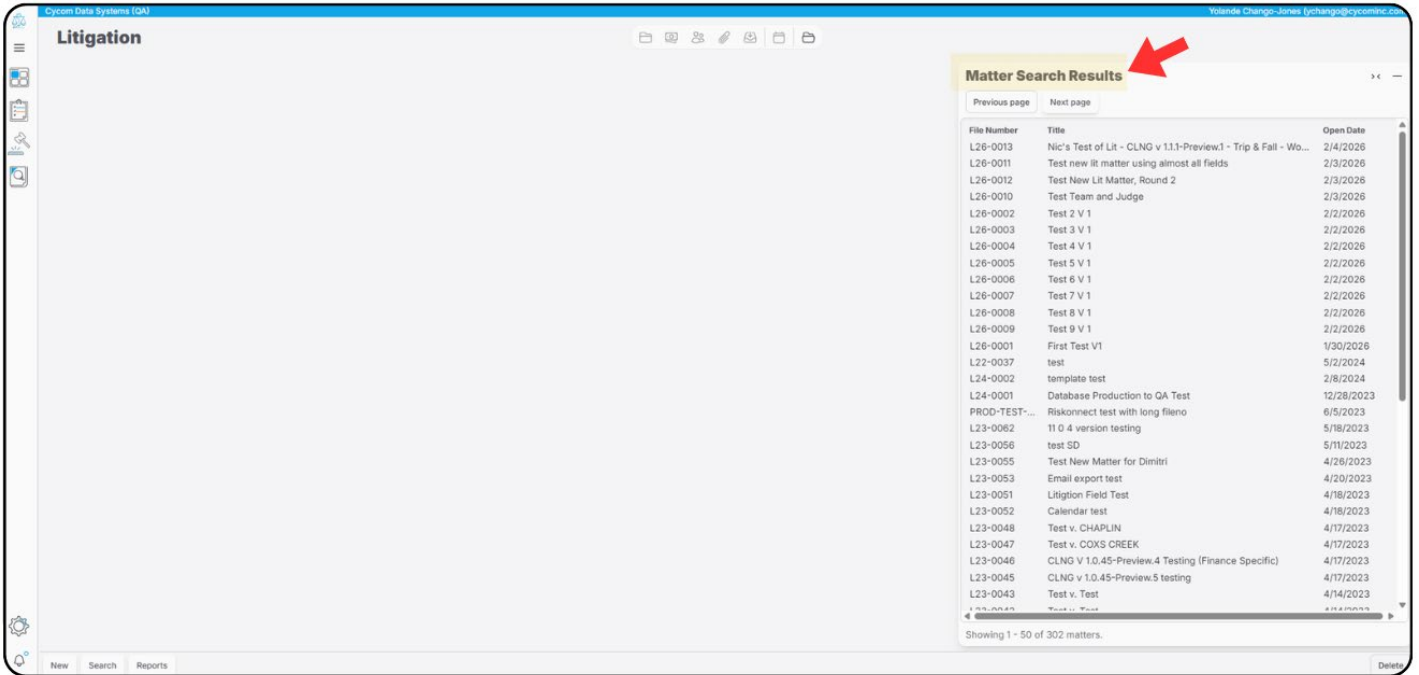
A **Search Criteria** window will appear allowing you to enter or select options to filter your search. Enter any information you know to locate the matter. Select **Search** to return the results.



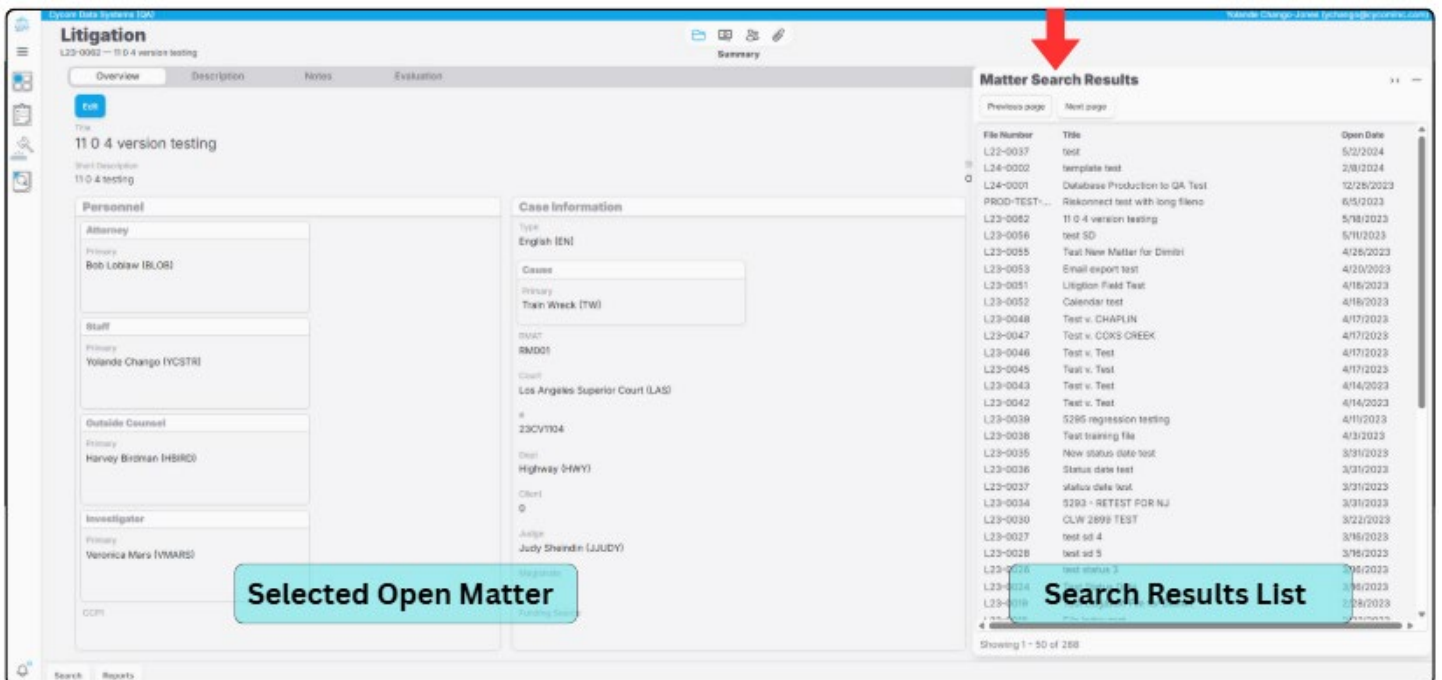
The screenshot shows the "Litigation Search" window with a red arrow pointing to the title. The window contains the following sections:

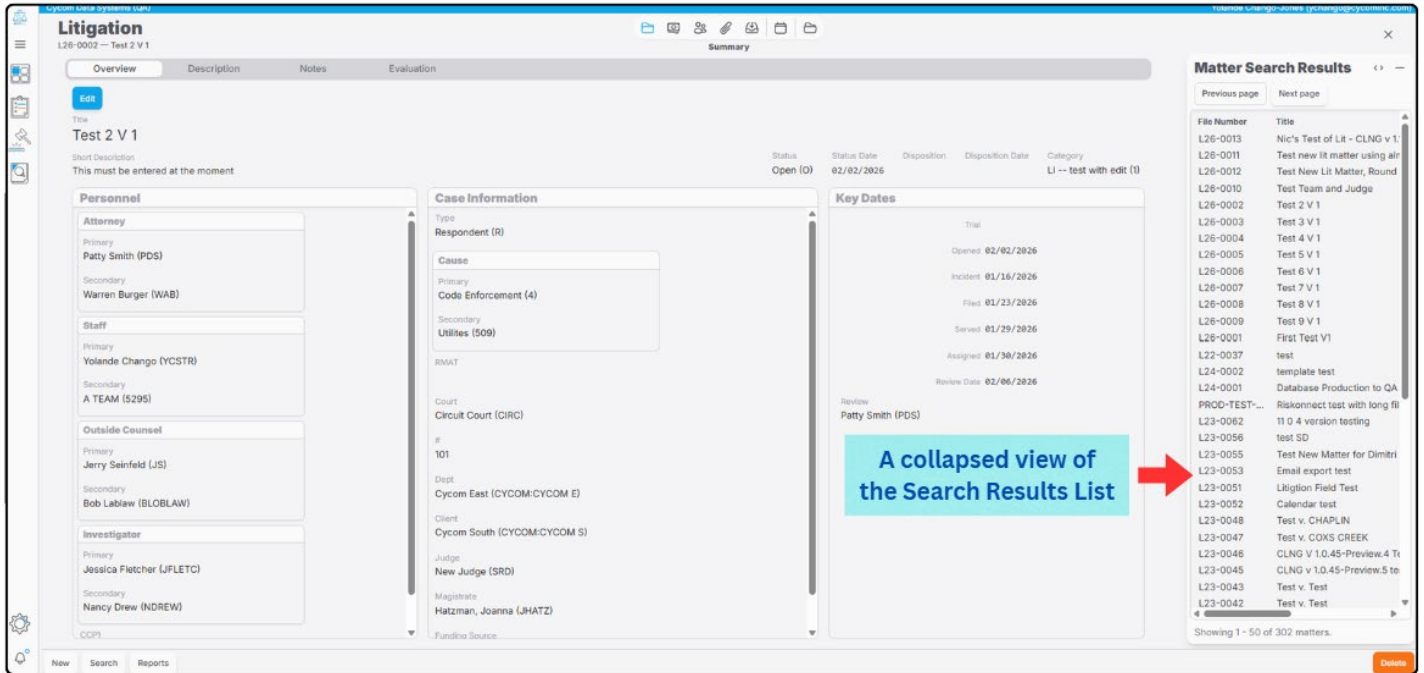
- Search Terms:** Includes a "Search" button, a "Reset" button, a "Case Sensitive" checkbox, and two rows of search input fields with "AND" and "OR" operators.
- Search in:** A grid of checkboxes for search criteria: Title, Abstract Description, Location, Status Description, Disposition Notes, Location Code, Keywords, Short Description, Evaluation, Payee, Caption, and Matter Notes.
- Search Type:** Radio buttons for "Contains" (selected), "Starts With", and "Exact Match".
- Case Information:** Includes a "File Number" input field, a "Statuses" dropdown menu, and a "Blank Status" checkbox.
- Dates:** Includes a "Blank Open Date" checkbox and two date range pickers labeled "Opened from" and "Opened to".

Assuming your selected **Search Criteria** finds at least one match, a **Search Result** panel will appear on the right side of the **Litigation** module.

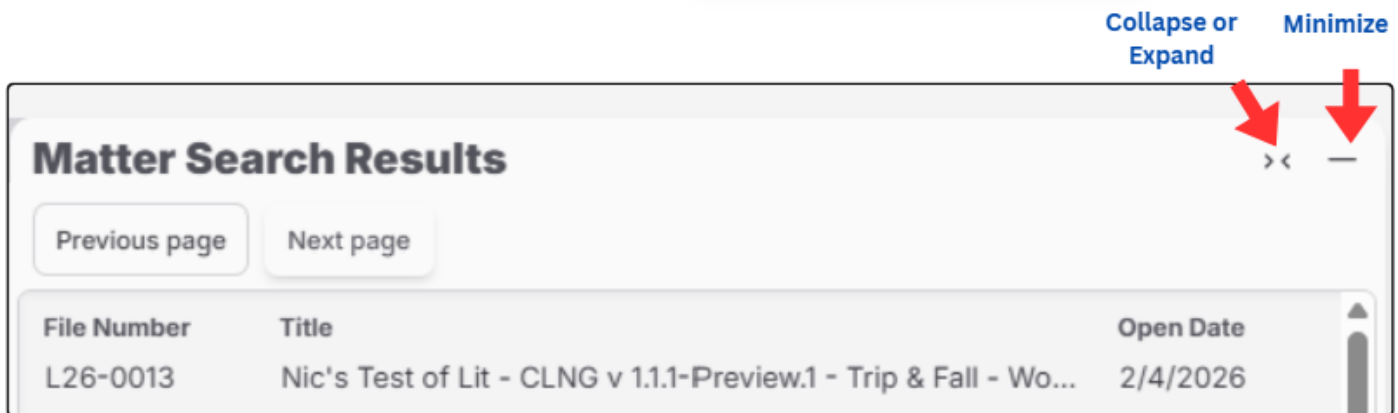


Selecting a matter from this list will open that matter on the left side.

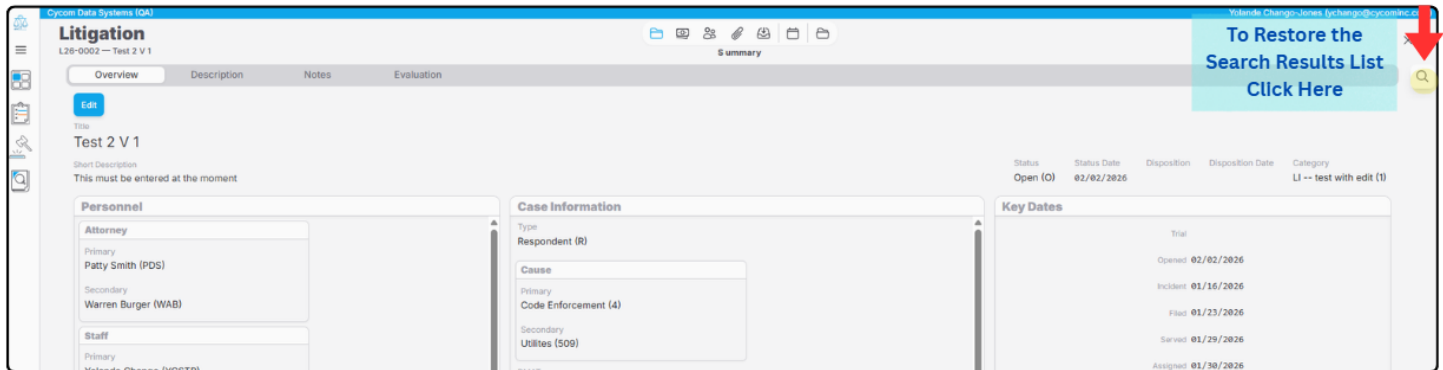




To collapse or expand the Search Results List click on the facing arrows, > < at the top right of the list, to minimize click on the dash to the top right.



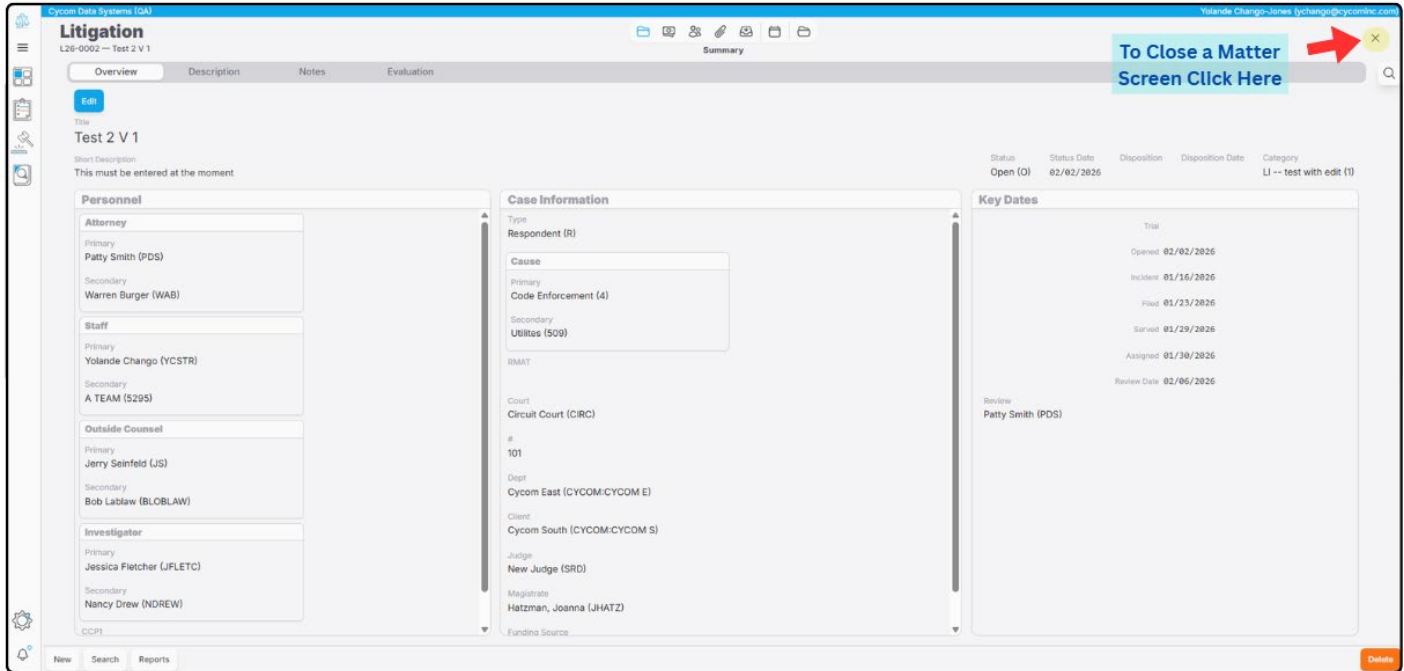
To restore the Search Results List, click on the magnifying glass.



### Close a Litigation Matter

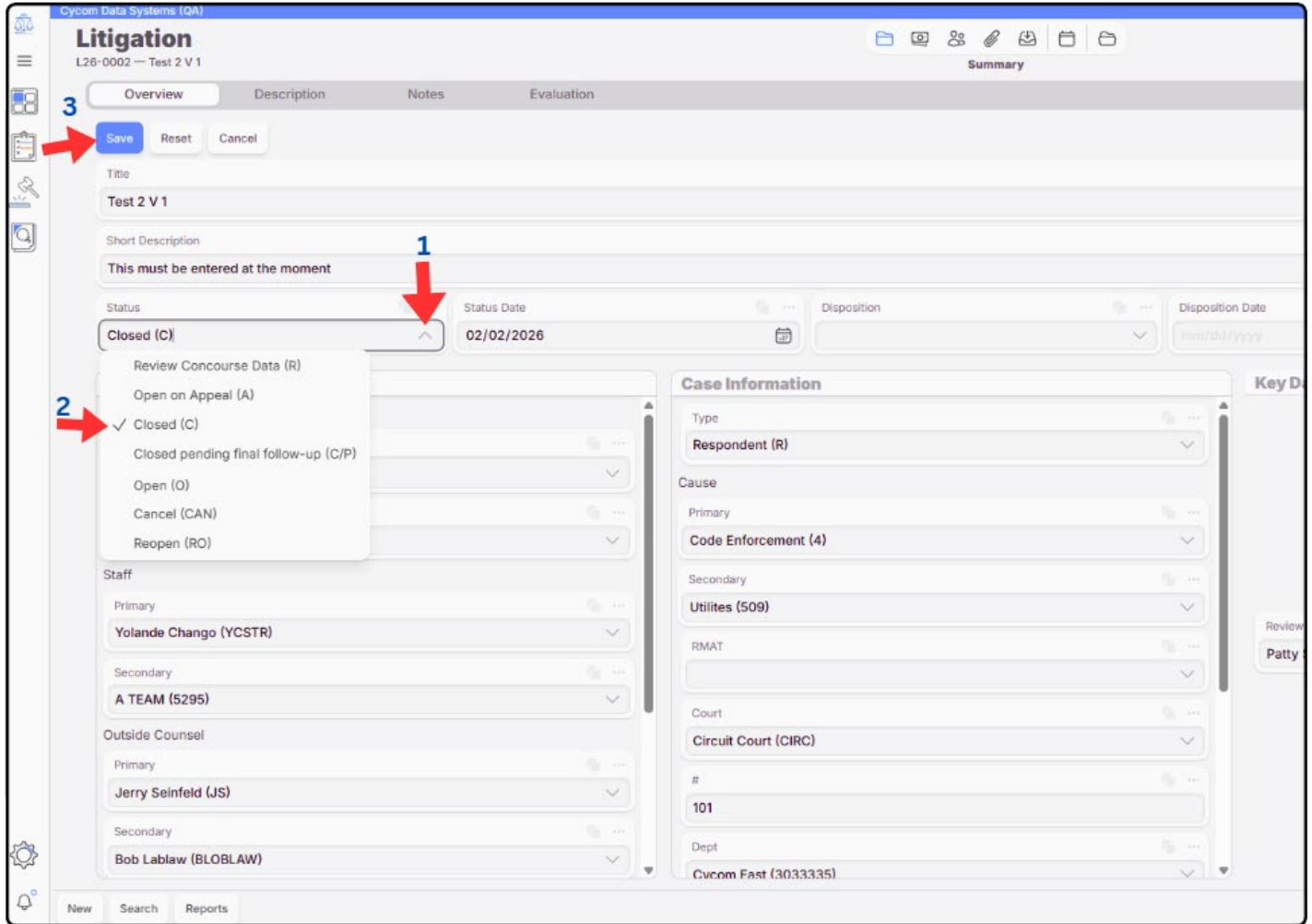
When we speak of closing a matter, this refers to two different tasks. The first refers to closing a matter because you are finished with your edits, research, or additions. The second refers to changing the matter status to closed, such as when a matter is disposed.

To close a **Litigation** matter to continue with other work, you can simply open another **Litigation** matter. Or you can also close the **Litigation** module using the **X** at the top right corner.



To disposition a Litigation matter, select **Edit** at the top left. The **Edit** button will be replaced by **Save**, **Reset**, and **Cancel** buttons. From the **drop-down** to the right of the **Status** field, select **Close (C)** type from the options listed or you might have multiple closed statuses to choose **one** from. Click **Save** to save your entry.

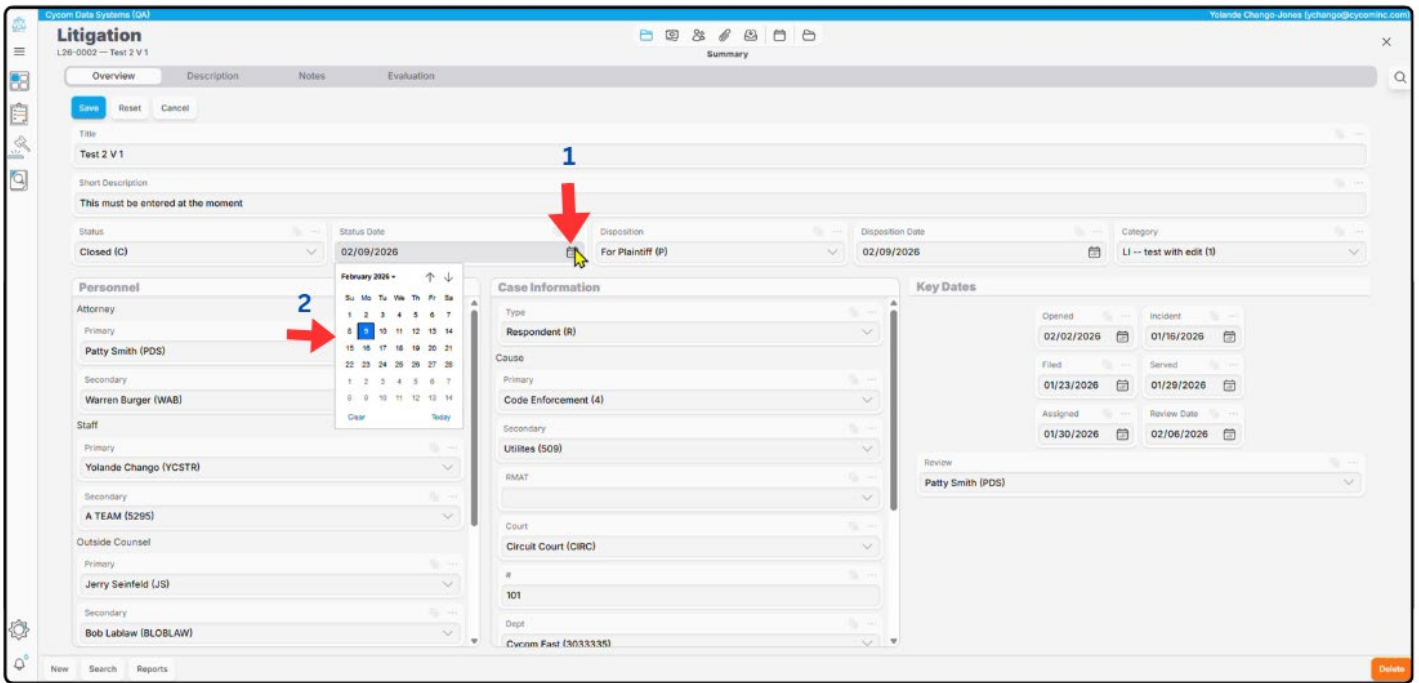
## Entering Status Type



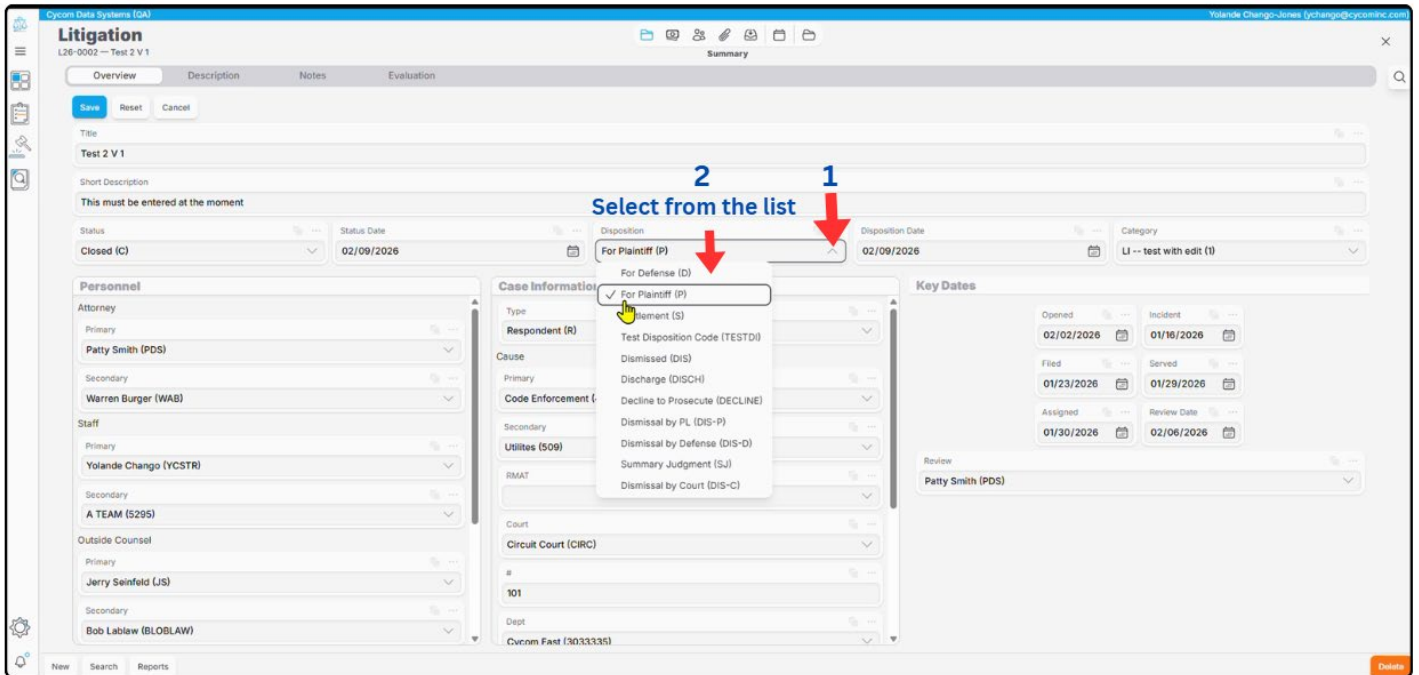
The screenshot displays the 'Litigation' module interface for case 'L26-0002 - Test 2 V 1'. The 'Overview' tab is active, showing a 'Save' button (labeled '3') and a dropdown menu for 'Status' (labeled '1'). The dropdown menu is open, showing options: 'Review Concourse Data (R)', 'Open on Appeal (A)', 'Closed (C)' (checked, labeled '2'), 'Closed pending final follow-up (C/P)', 'Open (O)', 'Cancel (CAN)', and 'Reopen (RO)'. The 'Status' field is currently set to 'Closed (C)'. The 'Status Date' is '02/02/2026'. The 'Disposition' field is empty. The 'Case Information' section on the right shows 'Type' as 'Respondent (R)', 'Cause' as 'Code Enforcement (4)', 'RMAT' as 'Utilites (509)', 'Court' as 'Circuit Court (CIRC)', and 'Dept' as 'Cyccom East (3033335)'. The 'Staff' section shows 'Primary' as 'Yolande Chango (YCSTR)' and 'Secondary' as 'A TEAM (5295)'. The 'Outside Counsel' section shows 'Primary' as 'Jerry Seinfeld (JS)' and 'Secondary' as 'Bob Lablaw (BLOBLAW)'. The bottom of the interface has 'New', 'Search', and 'Reports' buttons.

The **Status Date**, **Disposition**, and **Disposition Date** fields will need to be updated as well, the **Status Description** may be updated in the Description tab as needed.

## Entering Status Date



## Entering Disposition Type



The screenshot displays the Litigation module interface with the Disposition dropdown menu open. The menu lists various disposition types, with 'For Plaintiff (P)' selected. Red arrows and a blue text label '2 Select from the list' point to the dropdown menu. Another red arrow labeled '1' points to the Disposition field in the form header.

**2 Select from the list**

**1**

**Disposition**

- For Plaintiff (P)
- For Defense (D)
- Settlement (S)
- Test Disposition Code (TESTD)
- Dismissed (DIS)
- Discharge (DISCH)
- Decline to Prosecute (DECLINE)
- Dismissal by PL (DIS-P)
- Dismissal by Defense (DIS-D)
- Summary Judgment (SJ)
- Dismissal by Court (DIS-C)

**Case Information**

- Type: Respondent (R)
- Cause: Code Enforcement (C)
- Primary: Utilites (509)
- Secondary: RMAT
- Court: Circuit Court (CIRC)
- #: 101
- Dept: Cvcrom Fast (3033335)

**Personnel**

- Attorney: Primary: Patty Smith (PDS), Secondary: Warren Burger (WAB)
- Staff: Primary: Yolande Chango (YCSTR), Secondary: A TEAM (5295)
- Outside Counsel: Primary: Jerry Seinfeld (JS), Secondary: Bob Lablaw (BLOBLAW)

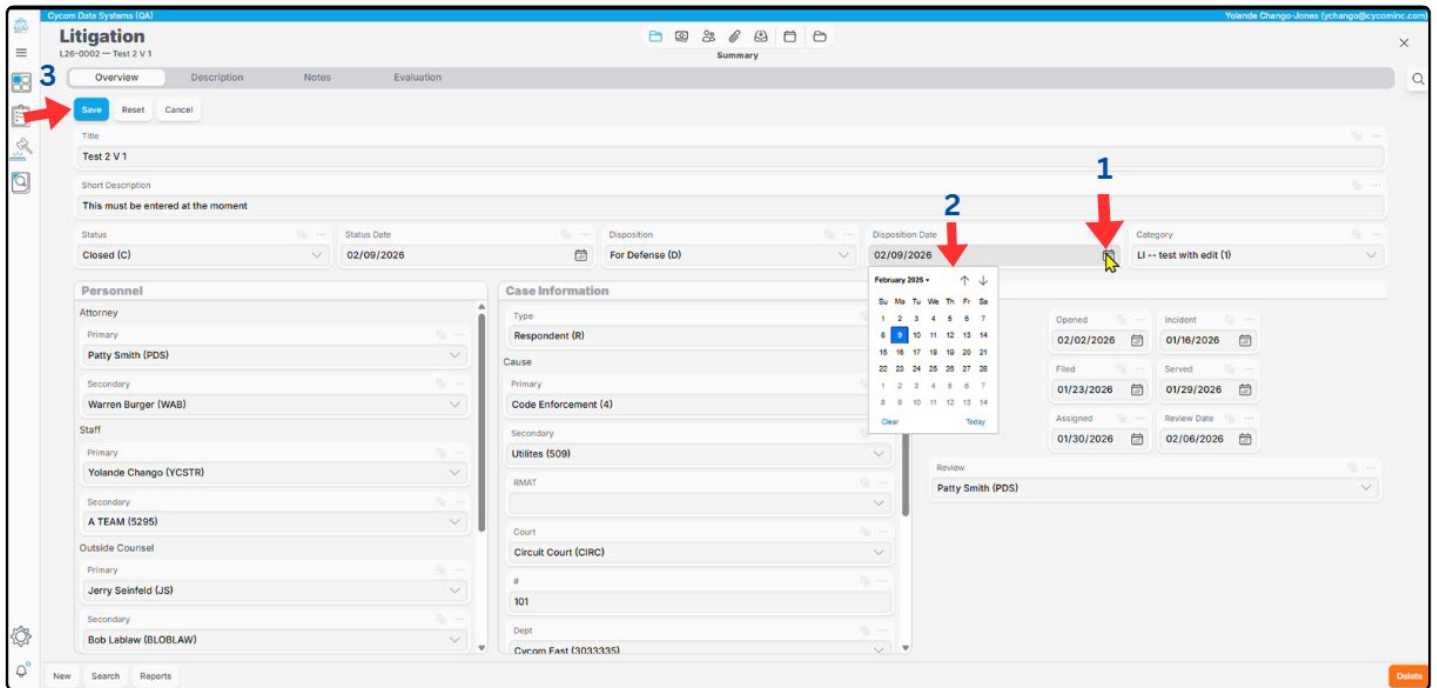
**Key Dates**

- Opened: 02/02/2026
- Incident: 01/10/2026
- Filed: 01/23/2026
- Served: 01/29/2026
- Assigned: 01/30/2026
- Review Date: 02/06/2026

**Review**

- Patty Smith (PDS)

## Entering Disposition Date



Select **Save** once done with the entries.

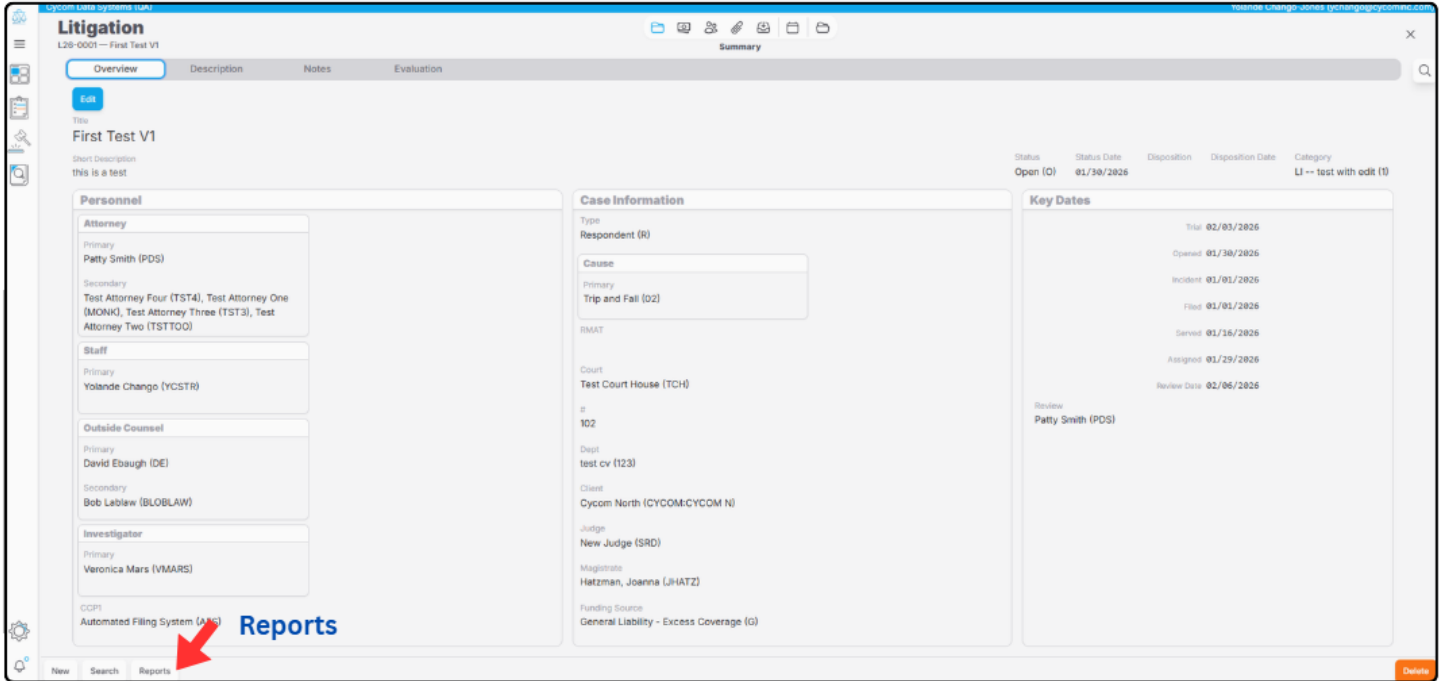
Now your matter status is set to **Closed** and will no longer appear in **Searches** or **Reports** limited to **Open Matters**. It will remain searchable and will remain in reports referencing **Closed Matters**.

# Litigation Report Options

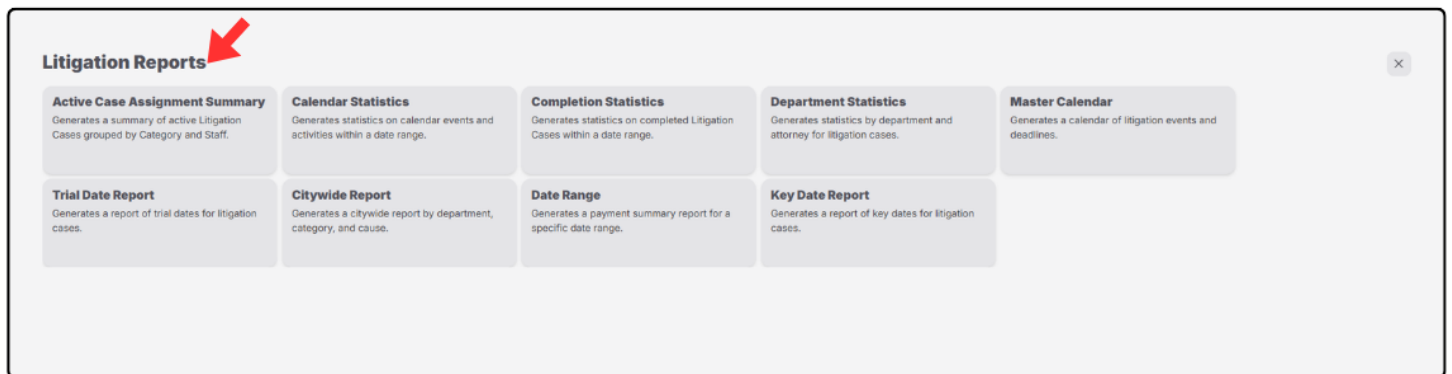
- [Create Built-in Litigation Reports](#)

## Create Built-in Litigation Reports

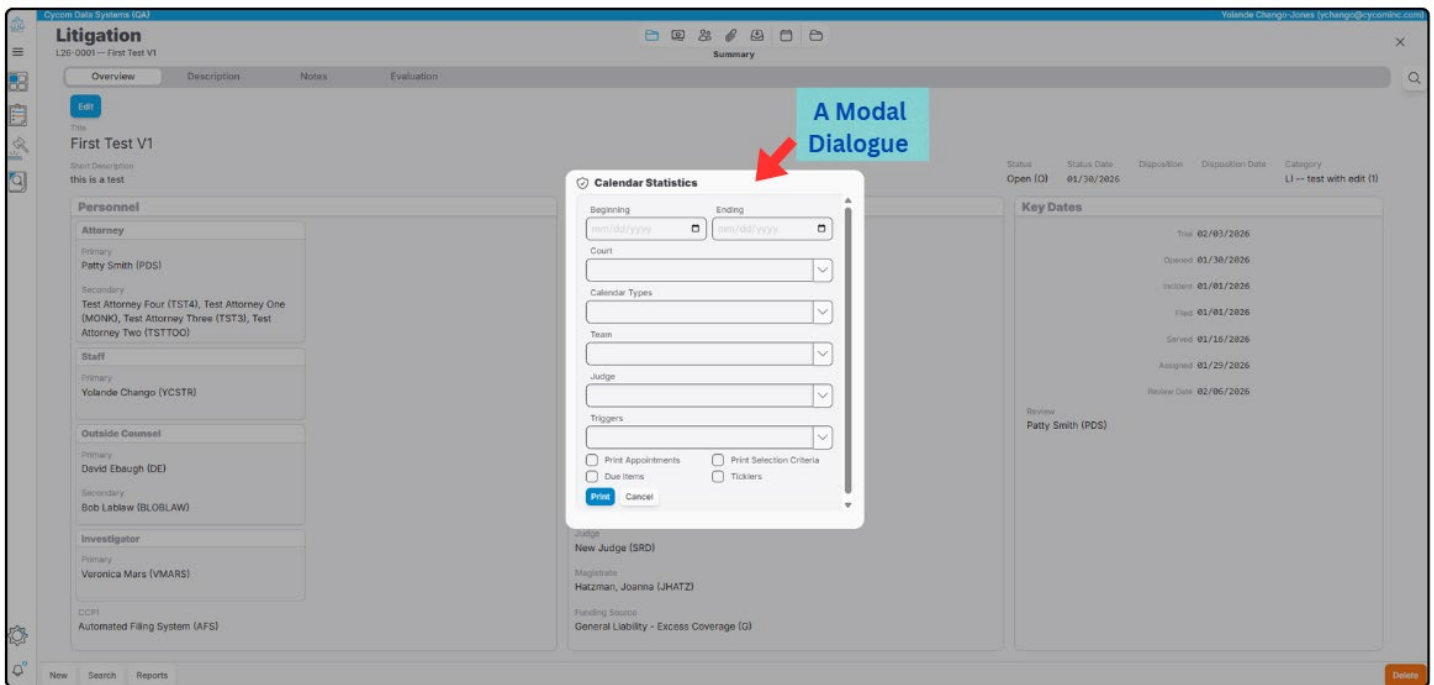
There are numerous built-in **Litigation** reports to choose from. To access these reports, select the **Reports** button from the action bar at the bottom.



The **Litigation Reports Cards** will appear. Select the report you wish to view.



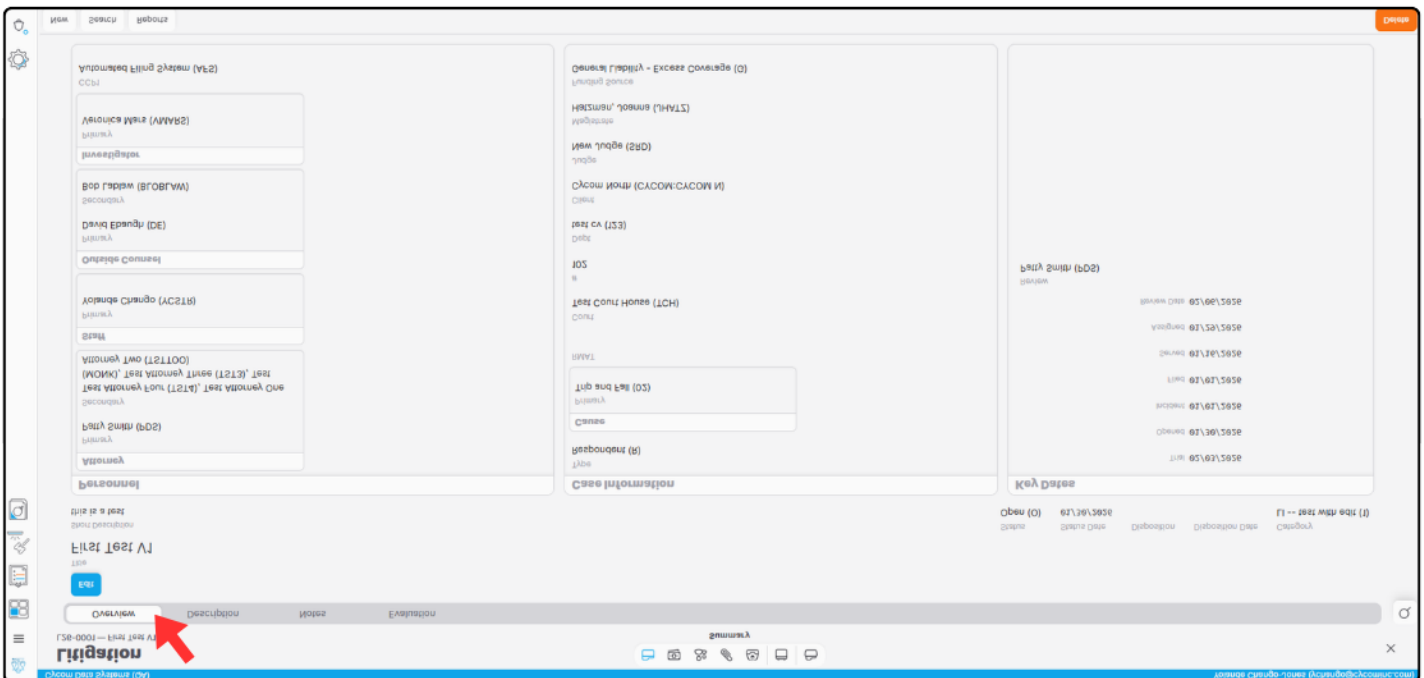
Some reports allow **additional customization options**, and you will be prompted to make your selections. The **example** in the image below is the **Calendar Statistics Report** option. Once selected, a modal dialogue (a pop-up window) appears. Your report will be displayed once you have made your selections.



# Litigation Basic Matter Data Fields

- [Overview Tab](#)
- [Description Tab](#)
- [Notes Tab](#)
- [Evaluation Tab](#)

## Overview Tab



### **File #**

The **CLNG Litigation** matter **File Number**. This will be auto generated upon creating a new **Litigation** matter.

### **Title**

A descriptive title for the matter. **This is a mandatory field.**

### **Short Description**

A text field to enter a brief description of the matter.

### **Status**

The current state of the matter. Status codes are classified 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 in the **Dashboard** view.

### **Status Date**

The date the status was last changed.

### **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 dispositioned.

### **Disposition Date**

The date the matter was dispositioned.

### **Category**

Category codes separate **Litigation** matters into classifications relevant to your office. Some examples of categories are Dangerous Condition, Personal Injury, Motor Vehicle Accident-Property Damage.

### Personnel

#### Attorney

**Primary:** The lead attorney on the matter. This field will auto-populate with the username if the user is the attorney.

**Secondary:** An unlimited number of staff may be assigned to assist with this matter.

#### Staff

**Primary:** The lead staff assigned to assist with this matter.

**Secondary:** An unlimited number of staff may be assigned to assist with this matter.

#### Outside Counsel

**Primary:** The lead outside counsel assigned to this matter.

**Secondary:** An unlimited number of outside counsels assisting with this matter.

#### Investigator

**Primary:** The lead investigator assigned to this matter.

**Secondary:** An unlimited number of investigators may be entered.

#### CCP1

This field is customizable and may be labeled differently by your office.

### Case Information

#### Type

Each category code has a subset of type codes. Some examples of type codes are Respondent, Petitioner, Defendant.

#### Cause

The cause code for the matter. A **primary** (only **one**) and **secondary** (maximum **five**) causes may be

#### Court

The code for the court that will see this matter.

#### Court Number (#)

This field may be used to refer to a specific courtroom number, or it may be used to enter a court filing number for the matter. Check with your **System Administrator** or **Office Manager** to confirm how your site uses this field.

#### Department (Dept)

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

#### Client/Account/Customizable Field Name

This field is often used to mirror the Department's Financial account field.

#### Judge

The judge that will preside over this matter.

#### Magistrate

The magistrate connected to this matter. This is an optionally visible field on the basic tab.

#### Funding Source

The fund from which the claims or settlement from the matter may be paid.

### **Key Dates**

#### **Opened Date**

The date the matter was opened.

#### **Incident Date**

The date the matter incident occurred.

#### **Filed Date**

The date the matter was filed.

#### **Served Date**

The date the matter was served.

#### **Assigned Date**

The date the matter was assigned.

#### **Review Date**

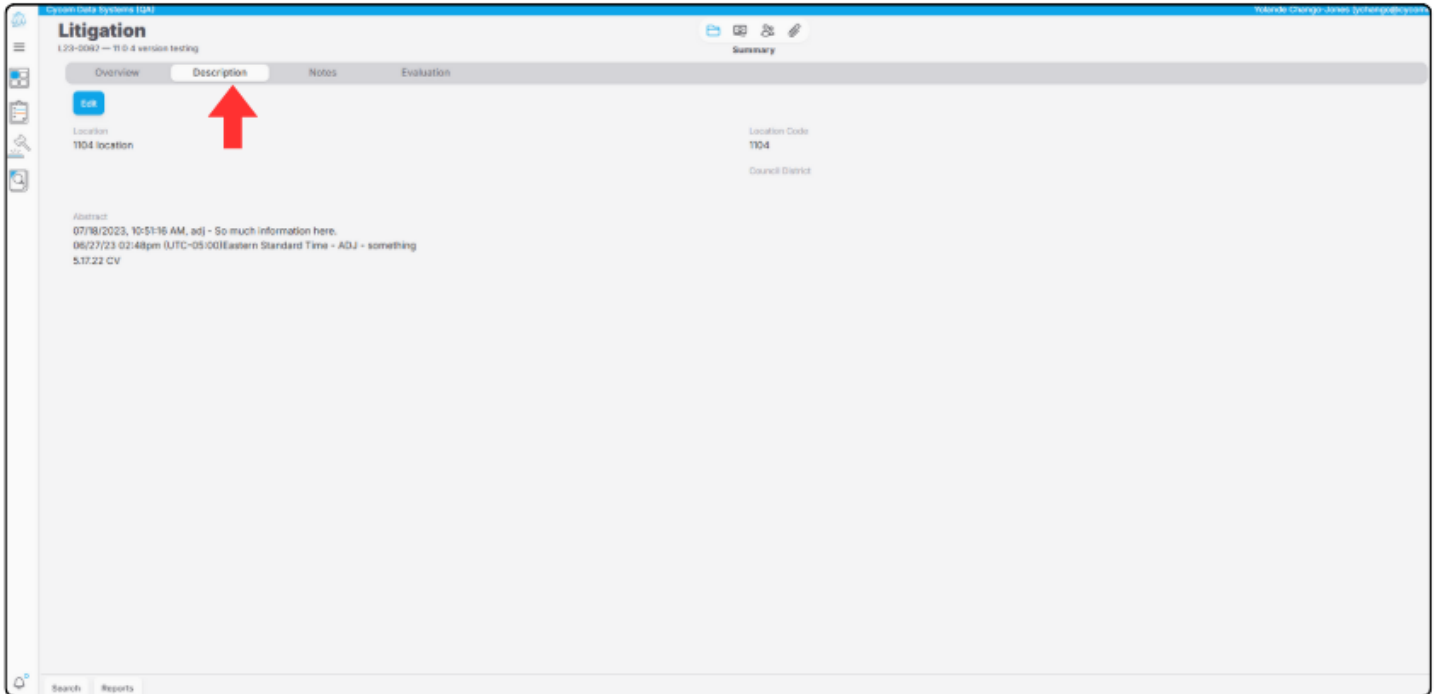
The date the matter is scheduled for review.

#### **Review**

The name of the Reviewer is listed here and can be selected from the drop-down menu.

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## 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.

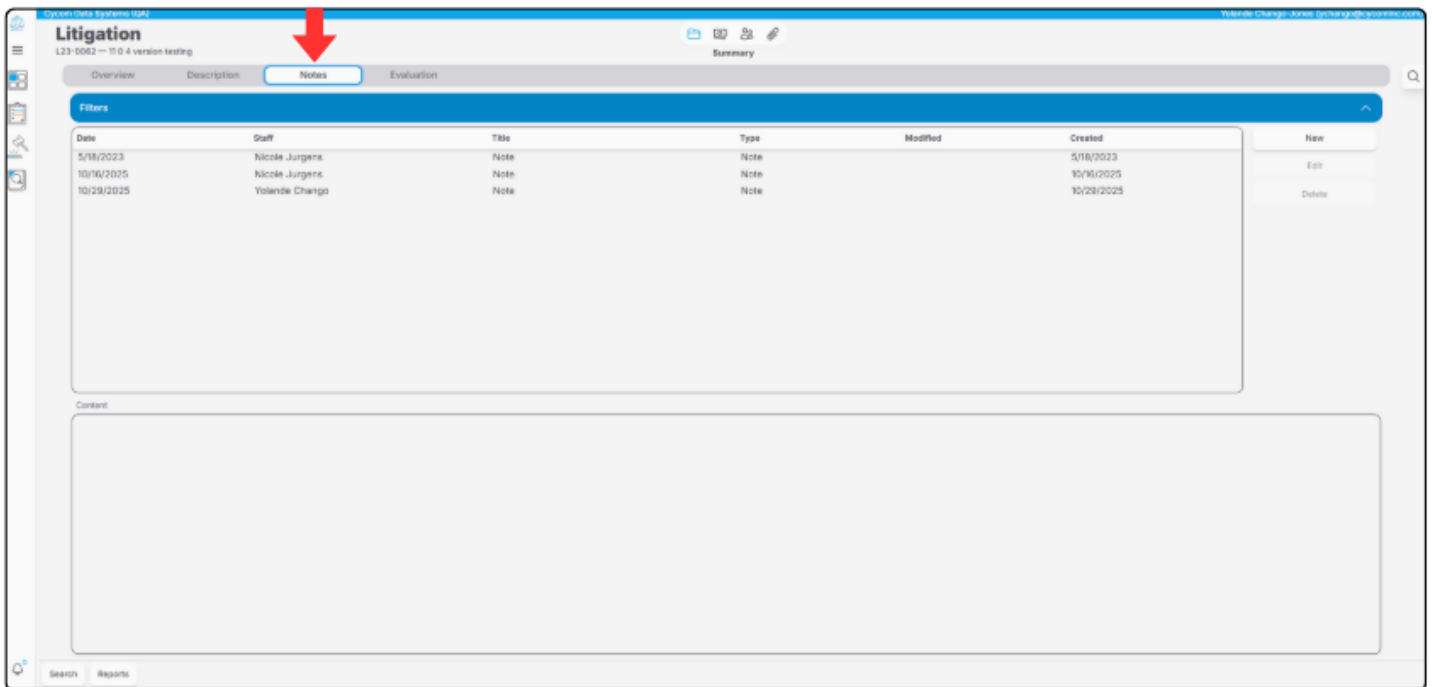
### Council District

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.

### Abstract

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

### Notes Tab



The screenshot shows the 'Litigation' module interface. The 'Notes' tab is selected, indicated by a red arrow. The interface displays a table of notes with the following data:

Date	Staff	Title	Type	Modified	Created
5/18/2023	Nicole Jurgens	Note	Note		5/18/2023
10/16/2025	Nicole Jurgens	Note	Note		10/16/2025
10/29/2025	Yolande Chango	Note	Note		10/29/2025

Below the table, there is a 'Content' section for the selected note, which is currently empty.

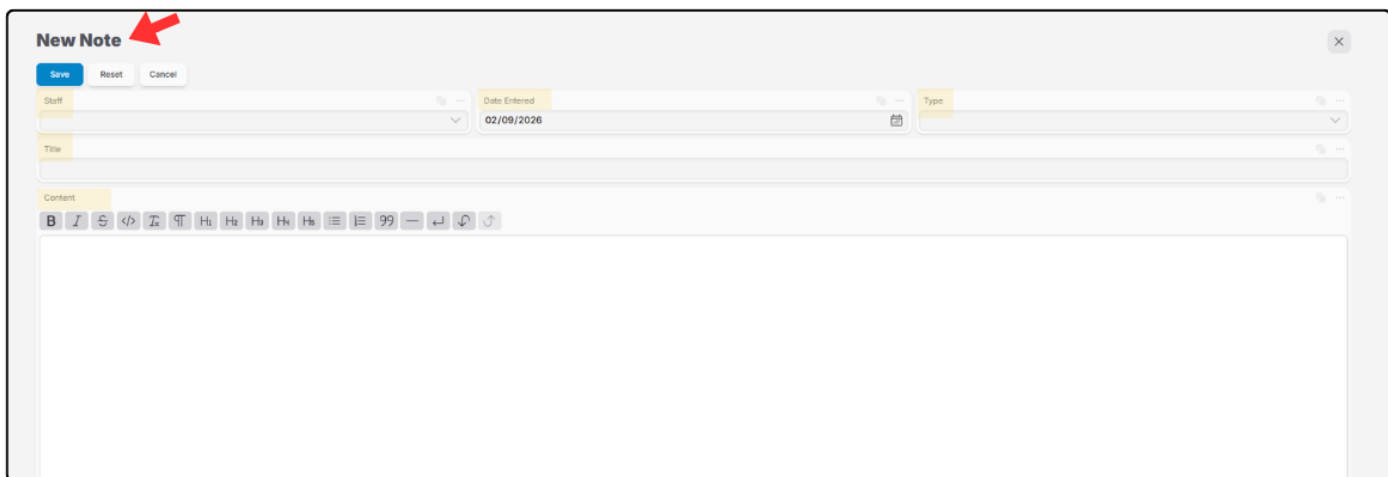
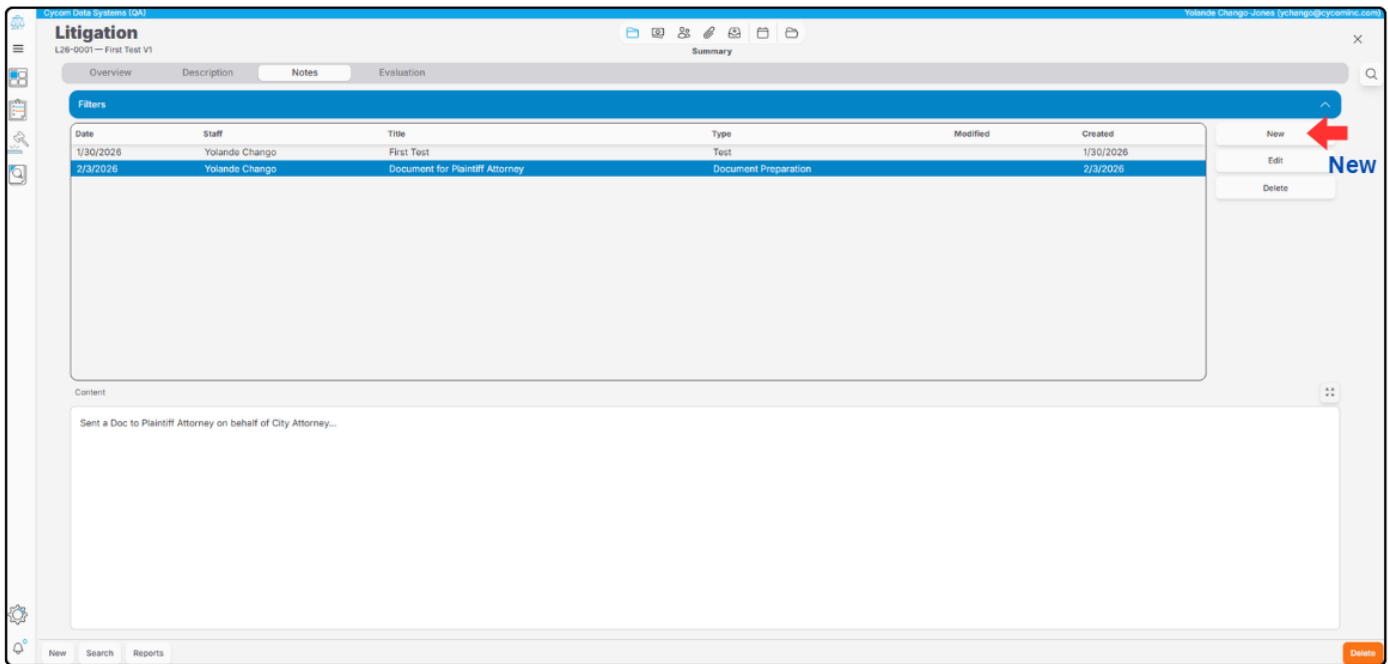
The **Notes** tab displays a list of notes that can be sorted using the list column headings and filtered using the filter options. The **Content** section (the lower half of the screen) of the Note will contain the details of the selected note.

**To view the notes in the table in descending or ascending order**, click on the Column headings: Date, staff, Title, Type, Modified, Created, a third time click will bring them to their original order.

Once a note is entered the **Edit** and **Delete** buttons will become bolded therefore available to use.

## New

An action button that opens **New Note** dialogue to create a new note.



**Staff**

The staff member recording the note.

**Date Entered**

This date will populate automatically with the current date.

**Type**

There is a list of type codes to choose from the drop-down menu. Some examples of type codes are Meeting, Phone call, Correspondence.

**Title**

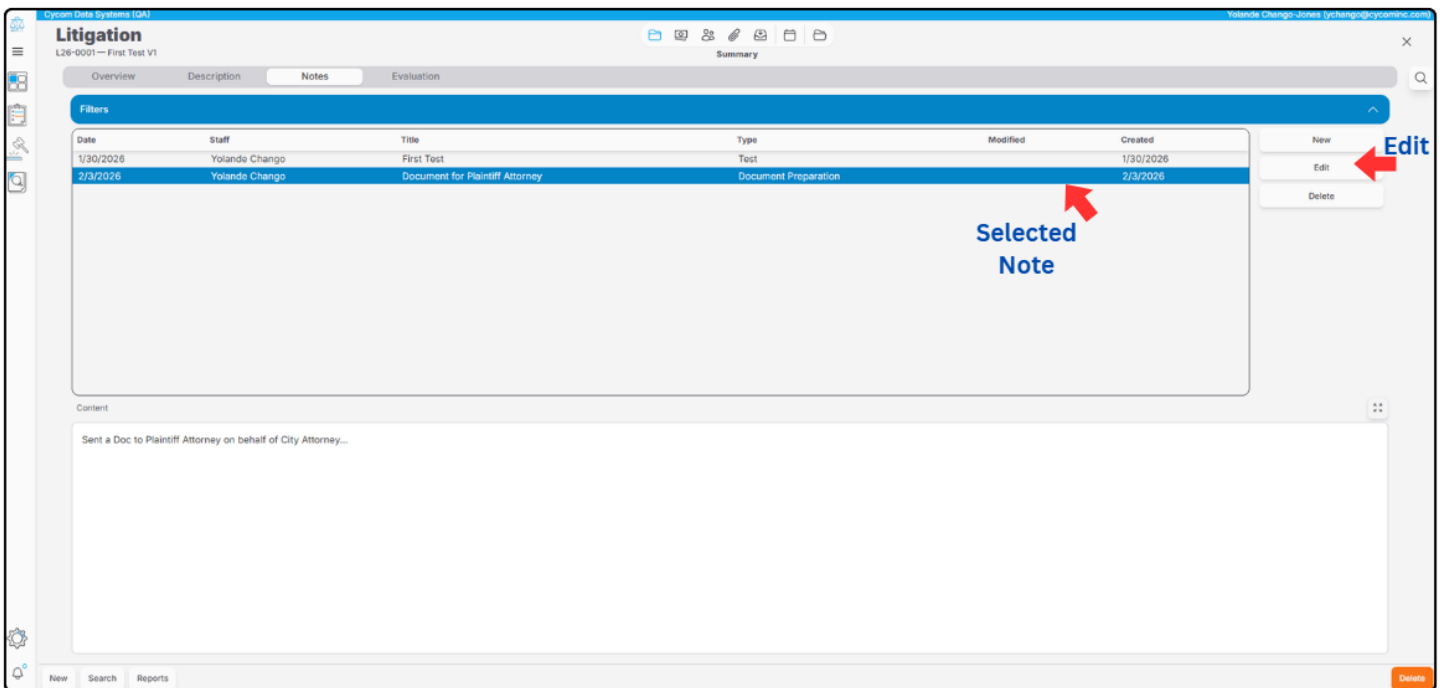
A descriptive title for the note.

**Content**

An unlimited text description of the note.

## Edit

An action button that opens the **Edit Note** dialogue. **A note must be selected** for the edit button to become available and allow for edits.



Any of the fields may be edited: the **Staff, Date Entered, Type, Title, Content** then **Save**.

**Edit Note** ✕

Save Reset Cancel

Staff: Yolande Chango (YCSTR) | Date Entered: 02/03/2026 | Type: Document Preparation (DOCPREP)

Title: Document for Plaintiff Attorney

Content:
 

Sent a Doc to Plaintiff Attorney on behalf of City Attorney...

## Delete

An action button that deletes the selected note.

**Litigation** Yolande Chango-Jones | ychango@cycominc.com

L26-0001 — First Test V1

Overview | Description | **Notes** | Evaluation

Filters

Date	Staff	Title	Type	Modified	Created
1/30/2026	Yolande Chango	First Test	Test		1/30/2026
2/3/2026	Yolande Chango	Document for Plaintiff Attorney	Document Preparation		2/3/2026

**Selected Note** ➔

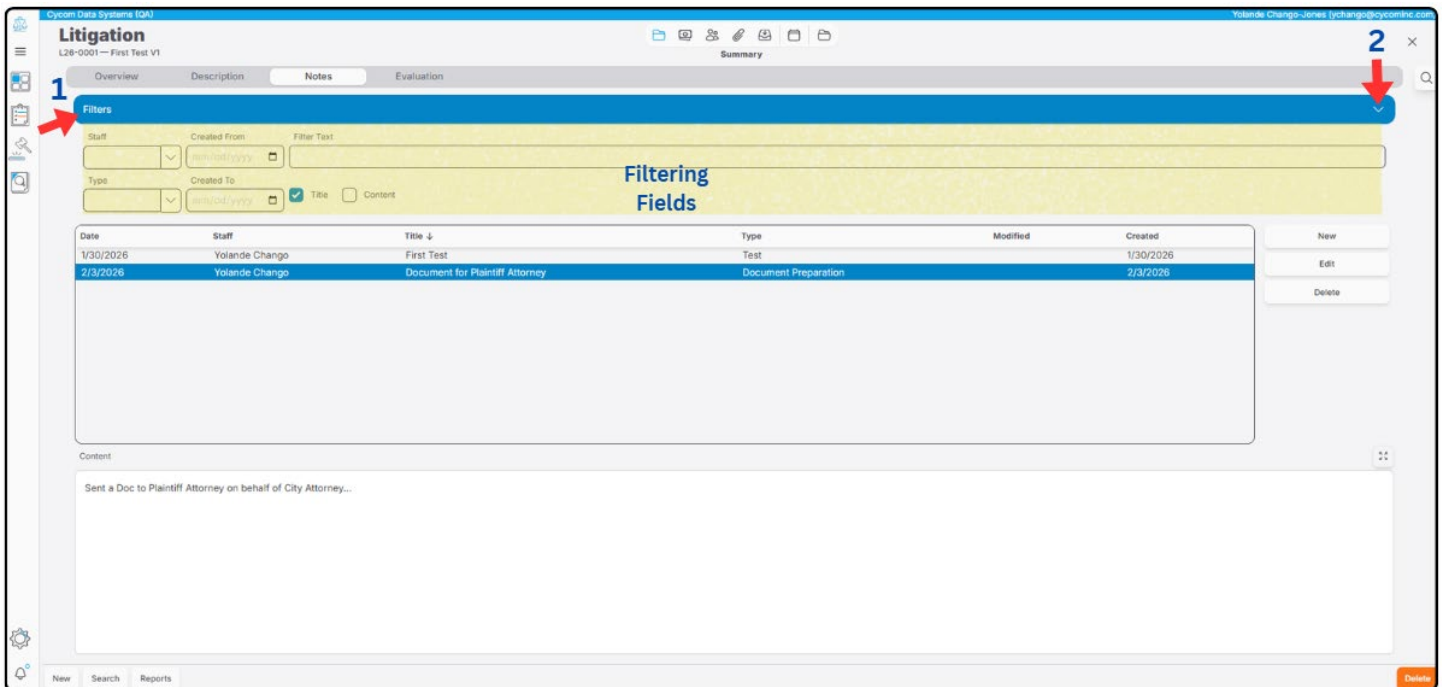
Content:
 

Sent a Doc to Plaintiff Attorney on behalf of City Attorney...

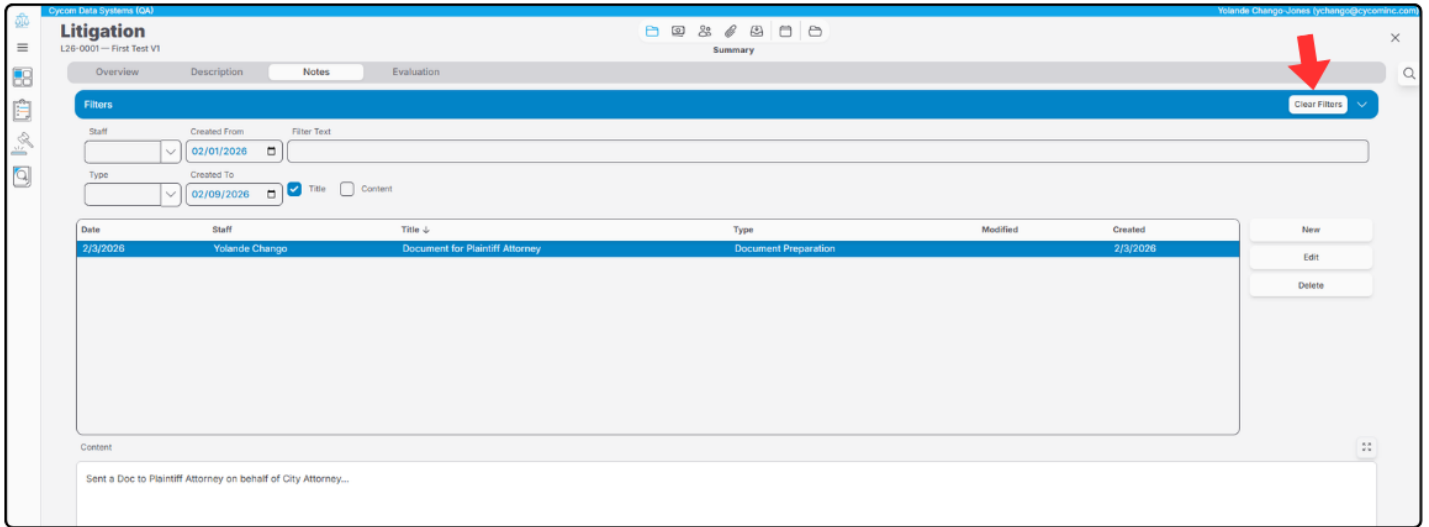
New  
Edit  
Delete ➔ **Delete**

## Filters

An action button to filter the note list according to the parameters selected or entered. This **can be expanded by clicking on the arrow to the far right** of the screen.



Once a date range is selected a **"Clear Filters"** button shows at the far right of the blue ribbon to clear selections and return to show all 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.

## Date From/To

Filter the notes according to a specific date range.

## Filter Text

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.

## Content

The content of a note will appear in this panel when a note is highlighted.

### **Evaluation Tab**

#### **Unlabeled Text Field**

An unlimited text field to enter any evaluation details of the matter.

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