LCMS\_User\_Guide

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# Legal Case Management System (LCMS) - Comprehensive User Guide

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## System Overview

Screenshot: System Overview The Legal Case Management System (LCMS) is a comprehensive, web-based application designed to streamline and centralize legal case management for organizations. Built on the Laravel framework with a Vue.js frontend, LCMS provides functionality for managing the entire case lifecycle from initiation to closure.

## User Roles and Permissions

Screenshot: User Roles The system features role-based access control, providing different permissions and functionality tailored to each role.

### Administrator

* **Access:** Full system access including user management, system configuration, and report generation.
* **Functions:** Create and manage user accounts, view complete audit logs, manage all cases.

### Supervisor

* **Access:** Case management and oversight with authority to approve closures and settlements.
* **Functions:** Assign cases, track progress, and ensure compliance.

### Lawyer

* **Access:** Assigned cases management and documentation.
* **Functions:** Create and manage cases, upload evidence, participate in communications.

### Clerk

* **Access:** Limited to data entry and basic case updates.
* **Functions:** Log court filings, update hearings.

## Getting Started

Screenshot: Getting Started

### System Requirements

Screenshot: System Requirements

#### Browser Compatibility

* **Recommended Browsers:** Chrome 90+, Firefox 88+, Safari 14+, Edge 90+
* **Screen Resolution:** Minimum 1024x768, Recommended 1920x1080
* **Internet Connection:** Stable broadband connection required
* **JavaScript:** Must be enabled for full functionality

#### Mobile Device Requirements

* **iOS:** iOS 13.0 or later
* **Android:** Android 8.0 (API level 26) or later
* **Mobile Browsers:** Safari Mobile, Chrome Mobile, Samsung Internet

### First-Time Setup and Account Activation

Screenshot: Account Activation

#### Account Activation Process

1. **Receive Invitation:**
   * Check your email for the LCMS account invitation
   * Click on the activation link within 24 hours
   * If link expires, contact your system administrator
2. **Initial Login Setup:**
   * Enter the temporary username provided
   * Use the temporary password from the invitation email
   * Complete the security verification process
3. **Password Creation:**
   * Create a strong password (minimum 8 characters)
   * Include uppercase, lowercase, numbers, and special characters
   * Password cannot match previous 5 passwords
   * Confirm password and save changes
4. **Security Questions Setup:**
   * Select 3 security questions from the provided list
   * Provide answers that you will remember
   * These will be used for password recovery

### Detailed Login Process

Screenshot: Login Interface

#### Standard Login Procedure

1. **Access the System:**
   * Navigate to the LCMS URL provided by your administrator
   * Bookmark the URL for easy access
   * Ensure you're using a secure connection (HTTPS)
2. **Enter Credentials:**
   * Input your username (case-sensitive)
   * Enter your password securely
   * Select "Remember Me" if using a personal device
3. **Two-Factor Authentication (if enabled):**

* Screenshot: Two-Factor Authentication
  + Enter the 6-digit code from your authenticator app
  + Or enter the code sent to your registered mobile number
  + Click "Verify" to complete authentication

1. **First Login Requirements:**
   * Change temporary password immediately
   * Review and accept terms of service
   * Complete profile information
   * Set notification preferences

#### Password Recovery Process

Screenshot: Password Recovery

1. **Initiate Recovery:** Click "Forgot Password" on login screen
2. **Identity Verification:** Enter your username or email address
3. **Security Questions:** Answer your pre-configured security questions
4. **Reset Options:** Choose email link or SMS code for password reset
5. **Create New Password:** Follow the secure password requirements

### Comprehensive Dashboard Navigation

Screenshot: Main Dashboard

#### Dashboard Layout and Components

* **Header Bar:**
  + System logo and organization name
  + Global search functionality
  + Notification bell with badge counter
  + User profile dropdown menu
  + Quick action buttons
* **Sidebar Navigation:**
* Screenshot: Sidebar Navigation
  + **Dashboard:** Main overview and statistics
  + **Cases:** Case management and creation
  + **Documents:** Document library and management
  + **Calendar:** Court dates and appointments
  + **Reports:** Analytics and reporting tools
  + **Chat:** Internal communication system
  + **Administration:** System settings (admin only)
* **Main Content Area:**
  + Dynamic content based on selected module
  + Breadcrumb navigation
  + Action buttons and filters
  + Data tables and visualization

#### Dashboard Widgets and Statistics

Screenshot: Dashboard Widgets

* **Case Statistics Cards:**
  + Total active cases
  + Cases assigned to you
  + Overdue cases requiring attention
  + Cases closed this month
* **Performance Metrics:**
  + Average case resolution time
  + Success rate percentage
  + Recovery amount statistics
  + Workload distribution charts
* **Recent Activity Feed:**
  + Latest case updates
  + Document uploads
  + Status changes
  + System notifications
* **Quick Actions Panel:**
  + Create new case
  + Upload documents
  + Schedule appointment
  + Generate report

#### Customizing Your Dashboard

Screenshot: Dashboard Customization

1. **Widget Management:**
   * Add or remove dashboard widgets
   * Resize and reposition widgets
   * Configure widget refresh intervals
2. **Theme Settings:**
   * Choose between light and dark themes
   * Adjust font size for accessibility
   * Set color preferences
3. **Notification Preferences:**
   * Configure email notifications
   * Set SMS alert preferences
   * Customize in-app notification settings

## Comprehensive Case Management

Screenshot: Managing Cases

### Detailed Case Creation Workflow

Screenshot: Case Creation Wizard

#### Step-by-Step Case Creation Process

1. **Access Case Creation:**
   * Navigate to Cases → Create New Case from the main menu
   * Or click the "+ New Case" button on the dashboard
   * Or use the quick action shortcut (Ctrl+N)
2. **Select Case Type:**

* Screenshot: Case Type Selection
  + **Clean Loan Recovery (Code: 01):** For loan recovery without collateral
  + **Labor Litigation (Code: 02):** Employment-related legal disputes
  + **Other Civil Litigation (Code: 03):** General civil matters
  + **Criminal Cases (Code: 04):** Criminal law proceedings
  + **Secured Loan Recovery (Code: 05):** Collateral-backed loan recovery
  + **Legal Advisory (Code: 06):** Legal consultation and advice

1. **Basic Case Information:**

* Screenshot: Basic Case Information Form
  + **Case Title:** Descriptive title for easy identification
  + **Internal File Number:** Organization's internal reference
  + **Branch/Work Unit:** Originating department or branch
  + **Priority Level:** High, Medium, or Low priority
  + **Expected Resolution Date:** Target completion date
  + **Case Description:** Detailed summary of the matter

1. **Party Information:**

* Screenshot: Party Information Form
  + **Plaintiff Details:**
    - Full legal name
    - Contact information (phone, email, address)
    - Legal representative details
    - Identification documents
  + **Defendant Details:**
    - Full legal name or business name
    - Contact information and addresses
    - Legal counsel information
    - Business registration details (if applicable)

1. **Financial Information (if applicable):**
   * **Claim Amount:** Total amount being claimed
   * **Outstanding Balance:** Current amount owed
   * **Interest Rate:** Applicable interest rates
   * **Payment History:** Previous payment records
2. **Document Attachment:**

* Screenshot: Document Upload Interface
  + Upload initial case documents
  + Categorize documents by type
  + Add document descriptions
  + Set access permissions

1. **Case Assignment:**
   * Select assigned lawyer from dropdown
   * Set supervisor for oversight
   * Add assignment notes and instructions
   * Configure notification settings
2. **Review and Save:**
   * Review all entered information
   * Validate required fields
   * Save as draft or submit for approval
   * Generate case number automatically

### Advanced Case Tracking and Monitoring

Screenshot: Case Tracking Dashboard

#### Timeline Visualization and Milestones

Screenshot: Case Timeline

* **Visual Timeline Features:**
  + Chronological view of all case activities
  + Color-coded events by type and importance
  + Milestone markers for key achievements
  + Deadline indicators and overdue alerts
* **Timeline Events Include:**
  + Case creation and assignment
  + Document uploads and modifications
  + Status changes and approvals
  + Court filings and hearings
  + Settlement negotiations
  + Payment receipts and recoveries

#### Comprehensive Case Status Management

Screenshot: Status Management Panel

* **Status Categories and Workflows:**
  + **Draft:** Case being prepared, not yet active
  + **Open:** Active case requiring attention
  + **In Progress:** Case actively being worked on
  + **Under Review:** Pending supervisor or legal review
  + **Awaiting Court:** Scheduled for court proceedings
  + **Settlement Negotiation:** In active settlement discussions
  + **Appeal Process:** Under appeal or preparing for appeal
  + **Suspended:** Temporarily halted
  + **Closed - Successful:** Favorable resolution achieved
  + **Closed - Unsuccessful:** Unfavorable outcome
  + **Closed - Settled:** Resolved through settlement

#### Progress Updates and Notes

Screenshot: Progress Update Form

1. **Adding Progress Updates:**
   * Click "Add Update" from the case details page
   * Select update type (Status Change, Court Filing, Meeting, etc.)
   * Enter detailed description of progress
   * Attach supporting documents if needed
   * Set follow-up reminders
2. **Update Categories:**
   * **Court Activities:** Hearings, filings, judgments
   * **Client Communications:** Meetings, calls, correspondence
   * **Document Activities:** Drafting, reviewing, filing
   * **Settlement Activities:** Negotiations, offers, agreements
   * **Administrative:** Internal processes, approvals

#### Appointment and Calendar Management

Screenshot: Calendar Integration

* **Scheduling Features:**
  + Integrate with court calendar systems
  + Schedule client meetings and consultations
  + Set automatic reminders and notifications
  + Coordinate with multiple participants
  + Sync with personal and team calendars
* **Appointment Types:**
  + **Court Hearings:** Scheduled court appearances
  + **Client Meetings:** Face-to-face or virtual consultations
  + **Depositions:** Witness testimony sessions
  + **Settlement Conferences:** Mediation and negotiation meetings
  + **Internal Reviews:** Team meetings and case reviews

## Case Entry Forms

Each case type includes specific forms with required fields.

### Clean Loan Recovery

* **Fields:** Branch, Internal File #, Outstanding Amount.
* **Documents:** Loan agreements, statements.

### Labor Litigation

* **Fields:** Work Unit, Employee Name, Claim Type.
* **Documents:** Contracts, grievances.

## Workflow and Approvals

Screenshot: Workflow and Approvals

### Supervisor Approval

The supervisor can review cases pending execution or closure from the panel. They can approve or request further information based on case documentation.

## Comprehensive Document Management System

Screenshot: Document Management

### Document Storage and Organization

Screenshot: Document Library

#### Document Categories and Types

* **Legal Documents:**
  + Pleadings and motions
  + Court orders and judgments
  + Legal briefs and memoranda
  + Settlement agreements
  + Appeal documents
* **Evidence and Discovery:**
  + Witness statements and depositions
  + Expert reports and opinions
  + Photographs and multimedia evidence
  + Financial records and statements
  + Correspondence and communications
* **Administrative Documents:**
  + Case intake forms
  + Client agreements and retainers
  + Internal memos and notes
  + Time tracking and billing records
  + Compliance and audit documents

#### Document Upload and Processing

Screenshot: Document Upload Interface

1. **Upload Methods:**
   * Drag and drop interface
   * Browse and select files
   * Bulk upload for multiple files
   * Email-to-case functionality
   * Scanner integration
2. **Document Processing:**
   * Automatic file format conversion
   * OCR (Optical Character Recognition) for scanned documents
   * Metadata extraction and indexing
   * Virus scanning and security checks
   * File size optimization
3. **Document Categorization:**
   * Automatic categorization based on content
   * Manual category assignment
   * Tag-based organization system
   * Custom folder structures
   * Date-based filing

### Advanced Version Control System

Screenshot: Version Control Interface

#### Version Tracking Features

* **Automatic Versioning:**
  + Every document edit creates a new version
  + Version numbering system (v1.0, v1.1, v2.0)
  + Timestamp and user attribution
  + Change summary and comments
* **Version Comparison:**
  + Side-by-side document comparison
  + Highlight changes and differences
  + Track additions, deletions, and modifications
  + Comment and annotation tracking
* **Version Management:**
  + Rollback to previous versions
  + Merge different versions
  + Branch and merge workflows
  + Version approval processes

#### Collaborative Editing Features

Screenshot: Collaborative Editing

* **Real-time Collaboration:**
  + Multiple users editing simultaneously
  + Live cursor tracking
  + Real-time change synchronization
  + Conflict resolution mechanisms
* **Review and Approval Workflow:**
  + Document review assignments
  + Approval routing and notifications
  + Comment and suggestion system
  + Final approval and lock functionality

### Document Security and Access Control

Screenshot: Document Security Settings

#### Security Features

* **Encryption and Protection:**
  + AES-256 encryption for stored documents
  + SSL/TLS encryption for data transmission
  + Digital signatures and certificates
  + Watermarking for sensitive documents
* **Access Control:**
  + Role-based document permissions
  + User-specific access rights
  + Time-limited access grants
  + IP-based access restrictions
* **Audit and Compliance:**
  + Complete access audit trails
  + Document view and download tracking
  + Compliance with legal hold requirements
  + Data retention policy enforcement

#### Backup and Recovery

Screenshot: Backup Management

* **Backup Strategy:**
  + Automated daily backups
  + Multiple backup locations
  + Incremental and full backup options
  + Cloud and on-premise backup storage
* **Recovery Options:**
  + Point-in-time recovery
  + Individual file restoration
  + Bulk recovery operations
  + Disaster recovery procedures

## Advanced Communication and Collaboration System

Screenshot: Communication and Chat

### Real-Time Messaging System

Screenshot: Chat Interface

#### Core Messaging Features

* **Instant Messaging:**
  + Real-time message delivery
  + Read receipts and delivery confirmations
  + Typing indicators
  + Message search and history
  + Emoji and reaction support
* **File Sharing and Collaboration:**
  + Drag-and-drop file sharing
  + Document preview in chat
  + Version control integration
  + File access permissions
  + Collaborative document editing
* **Message Organization:**
  + Message threading and replies
  + Message pinning and bookmarks
  + Message categories and tags
  + Advanced search and filtering
  + Message archiving

#### Conversation Types and Management

Screenshot: Conversation Management

* **Private Conversations:**
  + One-on-one messaging
  + Confidential communication
  + End-to-end encryption options
  + Self-destructing messages
* **Group Conversations:**
  + Team and project-based groups
  + Case-specific discussion groups
  + Department-wide communications
  + Temporary project groups
* **Channel Management:**
  + Public and private channels
  + Channel moderation tools
  + Member management and permissions
  + Channel archiving and deletion

### Video and Audio Conferencing

Screenshot: Video Conferencing

#### Conferencing Capabilities

* **Video Conferencing:**
  + HD video calls with multiple participants
  + Screen sharing and presentation mode
  + Virtual backgrounds and filters
  + Recording and playback functionality
  + Meeting scheduling and calendar integration
* **Audio Conferencing:**
  + High-quality voice calls
  + Conference call management
  + Mute and unmute controls
  + Call recording and transcription
  + Phone bridge integration
* **Meeting Management:**
  + Meeting rooms and scheduling
  + Participant management
  + Meeting notes and action items
  + Follow-up task assignment
  + Meeting analytics and reporting

### External Communication Integration

Screenshot: External Communication

#### Email Integration

* **Email Management:**
  + Integrated email client
  + Case-specific email threading
  + Automatic email archiving
  + Email template management
  + Bulk email capabilities
* **Client Communication:**
  + Secure client portals
  + Automated status updates
  + Document sharing with clients
  + Appointment scheduling
  + Client feedback collection

#### Comprehensive Notification System

Screenshot: Notification Center

* **Notification Types:**
  + Case status changes
  + Document updates and approvals
  + Court date reminders
  + Task assignments and deadlines
  + System maintenance alerts
* **Delivery Methods:**
  + In-app notifications
  + Email notifications
  + SMS text messages
  + Push notifications (mobile)
  + Desktop notifications
* **Notification Management:**
  + Customizable notification preferences
  + Notification scheduling and timing
  + Priority-based notification routing
  + Notification history and tracking
  + Do not disturb settings

## Advanced Notifications and Alert System

Screenshot: Notifications and Alerts

### Comprehensive Notification Categories

Screenshot: Notification Categories

#### Case-Related Notifications

* **Case Management Alerts:**
  + New case assignments with priority indicators
  + Case status changes and updates
  + Case closure approvals and rejections
  + Settlement offer notifications
  + Appeal filing deadlines
* **Court and Legal Alerts:**
  + Upcoming court hearings (24hr, 1 week advance)
  + Filing deadline reminders
  + Court order notifications
  + Judgment and decision alerts
  + Discovery deadline reminders
* **Document Notifications:**
  + New document uploads
  + Document review requests
  + Document approval/rejection status
  + Version update notifications
  + Document access requests

#### System and Administrative Alerts

* **User Management:**
  + New user account creation
  + Password expiration warnings
  + Account lockout notifications
  + Role and permission changes
  + Login attempt alerts
* **System Maintenance:**
  + Scheduled maintenance windows
  + System update notifications
  + Backup completion status
  + Performance monitoring alerts
  + Security incident notifications

### Notification Delivery and Management

Screenshot: Notification Settings

#### Multi-Channel Delivery System

* **In-Application Notifications:**
  + Real-time notification bell with badge counts
  + Notification center with categorization
  + Pop-up alerts for urgent matters
  + Toast notifications for updates
  + Dashboard notification widgets
* **Email Notifications:**
  + Immediate email alerts for critical events
  + Daily digest summaries
  + Weekly case status reports
  + Custom email templates
  + HTML and plain text formats
* **Mobile Notifications:**
  + Push notifications to mobile devices
  + SMS text message alerts
  + Mobile app badge notifications
  + Location-based court reminders
  + Offline notification queuing

#### Notification Customization and Preferences

Screenshot: Notification Preferences

* **Personal Preferences:**
  + Individual notification settings per user
  + Priority-based notification filtering
  + Time-based notification scheduling
  + Do not disturb periods
  + Vacation and out-of-office settings
* **Role-Based Notifications:**
  + Administrator-specific system alerts
  + Supervisor approval notifications
  + Lawyer case assignment alerts
  + Clerk data entry reminders
  + Client communication notifications
* **Advanced Filtering:**
  + Case type-specific notifications
  + Branch and department filtering
  + Amount threshold-based alerts
  + Date range notification settings
  + Keyword-based notification rules

### Alert Escalation and Response Management

Screenshot: Alert Escalation

#### Escalation Procedures

* **Automatic Escalation:**
  + Time-based escalation rules
  + Unread notification escalation
  + Critical alert escalation chains
  + Supervisor notification backup
  + Emergency contact procedures
* **Response Tracking:**
  + Notification acknowledgment tracking
  + Response time monitoring
  + Action taken documentation
  + Follow-up requirement tracking
  + Resolution confirmation

## Comprehensive Reporting and Analytics System

Screenshot: Reporting and Analytics

### Standard Report Categories

Screenshot: Standard Reports

#### Case Management Reports

* **Case Status Reports:**
  + Active cases by status and priority
  + Case aging analysis and overdue cases
  + Case closure rates and trends
  + Case assignment distribution
  + Case type performance analysis
* **Performance Analytics:**
  + Average case resolution times
  + Success rate by case type and lawyer
  + Recovery amount statistics and trends
  + Settlement vs. litigation outcomes
  + Appeal success rates
* **Workload Analysis:**
  + Lawyer workload distribution
  + Case assignment balance
  + Productivity metrics and KPIs
  + Time allocation analysis
  + Resource utilization reports

#### Financial and Recovery Reports

Screenshot: Financial Reports

* **Recovery Analytics:**
  + Total recovery amounts by period
  + Recovery rate by case type
  + Outstanding debt analysis
  + Settlement amount trends
  + Cost-benefit analysis
* **Financial Performance:**
  + Revenue generation reports
  + Cost per case analysis
  + Profitability by case type
  + Budget vs. actual spending
  + ROI calculations

### Custom Report Builder

Screenshot: Custom Report Builder

#### Report Creation Tools

* **Drag-and-Drop Interface:**
  + Visual report designer
  + Field selection and arrangement
  + Chart and graph creation
  + Template-based report building
  + Real-time preview functionality
* **Advanced Filtering:**
  + Multi-criteria filtering options
  + Date range selections
  + Case type and status filters
  + User and department filters
  + Amount and value-based filters
* **Data Visualization:**
  + Charts: Bar, line, pie, scatter plots
  + Tables with sorting and grouping
  + Dashboards with multiple widgets
  + Heat maps and trend analysis
  + Interactive data exploration

### Analytics Dashboard and KPIs

Screenshot: Analytics Dashboard

#### Key Performance Indicators (KPIs)

* **Operational KPIs:**
  + Case resolution time averages
  + Case backlog and aging metrics
  + Document processing efficiency
  + Court appearance success rates
  + Client satisfaction scores
* **Financial KPIs:**
  + Recovery rate percentages
  + Cost per case metrics
  + Revenue per lawyer
  + Settlement success rates
  + Collection efficiency ratios

#### Report Scheduling and Distribution

Screenshot: Report Scheduling

* **Automated Reporting:**
  + Scheduled report generation
  + Automatic email distribution
  + Dashboard refresh scheduling
  + Alert-based report triggers
  + Conditional report generation
* **Export and Sharing:**
  + Multiple export formats (PDF, Excel, CSV)
  + Secure report sharing links
  + Print-optimized layouts
  + Mobile-friendly report formats
  + API access for external systems

- **Reports Include:** - Case summaries and financial reports. - Analytics dashboards showing KPIs.

## Audit Logs and Compliance

Screenshot: Audit Logs and Compliance Comprehensive audit logs track all user activities. - **Features:** Activity tracking, data integrity checks, compliance reporting.

## System Administration

Screenshot: System Administration

### User and Role Management

* Create, modify, and deactivate user accounts.
* Assign roles and permissions.

### System Configuration

* Manage branches, case types, and workflows.

## Conclusion

LCMS is a robust tool for managing legal operations effectively, providing accountability, compliance, and insights essential for organizational growth.

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## System Overview

The Legal Case Management System (LCMS) is a comprehensive web-based platform designed to centralize and streamline legal operations within organizations. Built on Laravel framework with Vue.js frontend, LCMS provides:

* **Centralized Case Management:** Single repository for all legal cases with complete lifecycle tracking
* **Role-Based Access Control:** Secure access based on user roles (Admin, Supervisor, Lawyer)
* **Document Management:** Secure storage and version control for legal documents
* **Workflow Automation:** Automated approval processes and task assignments
* **Real-time Communication:** Built-in chat system for case collaboration
* **Comprehensive Reporting:** Analytics and insights for legal operations
* **Audit Trail:** Complete activity logging for compliance and accountability

### Key Features:

* Multi-tenant architecture supporting branches and work units
* Six distinct case types with specialized forms and workflows
* Progress tracking with timeline visualization
* Appeal and execution management
* Evidence and document attachment capabilities
* Automated notifications and reminders
* PDF report generation
* Advanced search and filtering capabilities

## User Roles and Permissions

### Administrator

**Full System Access** - **User Management:** Create, edit, delete, and manage user accounts - **System Configuration:** Manage branches, work units, case types, and system settings - **Role Management:** Assign and modify user roles and permissions - **Audit Access:** View complete audit logs and system activity - **Report Generation:** Access all reports and analytics - **System Maintenance:** Database backups, system updates, and maintenance tasks - **Case Oversight:** View and manage all cases across all branches

### Supervisor

**Case Management and Oversight** - **Case Assignment:** Assign cases to lawyers and monitor workload distribution - **Approval Authority:** Approve case executions, closures, and settlements - **Progress Monitoring:** Track case progress and lawyer performance - **Report Access:** Generate reports for supervised cases and lawyers - **Budget Oversight:** Monitor claimed amounts and recovery targets - **Quality Control:** Review case documentation and ensure compliance - **Cannot:** Modify system settings or manage user accounts

### Lawyer

**Case Handling and Documentation** - **Assigned Cases:** Create, update, and manage assigned cases - **Document Management:** Upload, organize, and manage case documents - **Progress Updates:** Post regular updates on case developments - **Evidence Management:** Add and organize case evidence - **Appointment Scheduling:** Schedule and manage court appointments - **Communication:** Participate in case-related communications - **Cannot:** View other lawyers' private notes or access system administration

## Getting Started

### System Access

1. **Login Process:**
2. Navigate to the LCMS URL provided by your administrator
3. Enter your username and password
4. Complete two-factor authentication if enabled
5. Change password on first login (required)
6. **Dashboard Overview:**
7. **Sidebar Navigation:** Access different modules (Cases, Reports, Chat, etc.)
8. **Notification Bell:** View pending tasks and alerts
9. **Search Bar:** Quick case and document search
10. **User Profile:** Access profile settings and logout
11. **Statistics Cards:** Overview of case counts and performance metrics
12. **Interface Navigation:**
13. **Main Dashboard:** Central hub with key metrics and recent activities
14. **Cases Module:** Primary workspace for case management
15. **Reports Section:** Analytics and reporting tools
16. **Chat System:** Internal communication platform
17. **Settings:** Personal preferences and system configuration (admin only)

## Case Management

### Creating a New Case

1. **Navigate to Cases → Create New Case**
2. **Select Case Type** from the six available options:
3. Clean Loan Recovery
4. Labor Litigation
5. Other Civil Litigation
6. Criminal Litigation
7. Secured Loan Recovery
8. Legal Advisory
9. **Complete Basic Information:**
10. File Number (auto-generated or manual)
11. Case Title
12. Description
13. Branch and Work Unit
14. Court Name (if applicable)
15. **Fill Case-Specific Fields** (detailed below)
16. **Add Parties:**
17. Plaintiff information (name, contact, address, email)
18. Defendant information (name, contact, address, email)
19. **Save and Assign** to appropriate lawyer

### Case Status Management

Cases progress through defined statuses: - **Open:** Active cases requiring attention - **Closed:** Completed cases with final resolution - **Suspended:** Temporarily halted cases

### Progress Tracking

* **Timeline View:** Visual representation of case milestones
* **Progress Updates:** Regular status reports by assigned lawyer
* **Appointment Tracking:** Court dates and legal meetings
* **Evidence Log:** Chronological evidence collection
* **Document History:** Version control for case documents

## Detailed Case Types and Entry Fields

### 1. Clean Loan Recovery (Code: 01)

**Purpose:** Recovery of loans without collateral security

**Core Case Fields:** - **File Number:** Auto-generated (CLN-[BRANCH]-[SEQUENCE]) - **Title:** Case description/title - **Description:** Detailed case summary - **Branch:** Originating branch - **Work Unit:** Responsible work unit - **Court Name:** Court handling the case - **Status:** Open/Closed/Suspended - **Opened At:** Case initiation date - **Closed At:** Case closure date (if applicable) - **Lawyer ID:** Assigned lawyer - **Created By:** Case creator

**Specific Fields:** - **Outstanding Amount:** *[Required]* Remaining loan balance to be recovered - **Recovered Amount:** Amount successfully recovered from borrower - **Court File Number:** Court's reference number for the case - **Claimed Amount:** Total amount claimed in legal proceedings

**Parties Information:** - **Plaintiff:** Bank/Financial institution details - **Defendant:** Borrower information with contact details

**Workflow Features:** - Progress tracking with recovery milestones - Settlement negotiation records - Payment plan management - Early closure approval process

### 2. Labor Litigation (Code: 02)

**Purpose:** Employment and labor law disputes

**Core Case Fields:** - **File Number:** Auto-generated (LBR-[BRANCH]-[SEQUENCE]) - **Title, Description, Branch, Work Unit, Court Name, Status, Dates** - **Lawyer Assignment and Creator Information**

**Specific Fields:** - **Claim Type:** *[Required]* Dropdown options: - Money: Financial compensation claims - Material: Property or asset claims - Both: Combined monetary and material claims - **Claim Amount:** *[Conditional]* Required if claim type includes 'Money' - **Claim Material Description:** *[Conditional]* Required if claim type includes 'Material' - **Recovered Amount:** Total amount/value recovered - **Early Settled:** Boolean flag for out-of-court settlements - **Execution Opened At:** Date legal execution began - **Court File Number:** Court reference - **Claimed Amount:** Total claimed value

**Closure Management:** - **Closed At:** Case closure date - **Closed By:** User who closed the case - **Closure Type:** Settlement/Judgment/Dismissal

### 3. Other Civil Litigation (Code: 03)

**Purpose:** General civil disputes not covered by other categories

**Core Case Fields:** Same as Labor Litigation

**Specific Fields:** - **Claim Type:** Money/Material/Both (same as Labor Litigation) - **Claim Amount:** Financial value of claim - **Claim Material Description:** Description of non-monetary claims - **Recovered Amount:** Successfully recovered value - **Early Settled:** Settlement indicator - **Execution Opened At:** Execution commencement date - **Court File Number:** Court reference number - **Claimed Amount:** Total claim value

**Additional Features:** - Contract dispute management - Property dispute tracking - Damage claim calculations - Settlement negotiation history

### 4. Criminal Litigation (Code: 04)

**Purpose:** Criminal cases involving the organization

**Core Case Fields:** Standard case information

**Specific Fields:** - **Police Ref No:** *[Optional]* Police investigation reference - **Prosecutor Ref No:** *[Optional]* Prosecution office reference - **Evidence Summary:** *[Optional]* Brief overview of collected evidence - **Status:** *[Required]* Dropdown options: - Submitted: Case filed with authorities - ProsecutorReview: Under prosecution review - Court: Active in court proceedings - Closed: Case concluded - **Recovered Amount:** Any financial recovery from criminal proceedings - **Court File Number:** Court case reference

**Criminal-Specific Features:** - Evidence chain-of-custody tracking - Witness management - Law enforcement coordination - Prosecution liaison

### 5. Secured Loan Recovery (Code: 05)

**Purpose:** Recovery of loans backed by collateral

**Core Case Fields:** Standard case information

**Financial Fields:** - **Loan Amount:** *[Required]* Original loan principal - **Outstanding Amount:** *[Required]* Current unpaid balance - **Claimed Amount:** *[Optional]* Amount claimed in legal proceedings - **Recovered Amount:** Amount successfully recovered - **Customer Name:** *[Optional]* Borrower's full name - **Company File Number:** *[Optional]* Internal company reference

**Collateral Management:** - **Collateral Description:** *[Optional]* Detailed description of security - **Collateral Value:** *[Optional]* Estimated market value - **Collateral Estimation Path:** *[Optional]* Document path for valuation reports

**Foreclosure Process:** - **Foreclosure Notice Date:** *[Optional]* Date of foreclosure notification - **Foreclosure Warning:** *[Boolean]* Warning issued flag - **First Auction Held:** *[Boolean]* First auction completion status - **Second Auction Held:** *[Boolean]* Second auction completion status - **Warning Document Path:** *[Optional]* Path to warning documentation - **Auction Publication Path:** *[Optional]* Path to auction notices

**Closure Management:** - **Closure Type:** *[Optional]* Method of case resolution: - fully\_repaid: Complete loan repayment - collateral\_sold: Asset liquidation - restructured: Modified payment terms - settlement: Negotiated agreement - collateral\_acquired: Bank takes possession - **Closure Notes:** *[Optional]* Additional closure information - **Closed At:** Case closure date - **Closed By:** User who closed the case

**Related Records:** - **Auctions:** Linked auction events and results - **Progress Updates:** Regular status updates

### 6. Legal Advisory (Code: 06)

**Purpose:** Internal legal consultation and document review services

**Core Case Fields:** Standard case information

**Advisory Classification:** - **Advisory Type:** *[Required]* Service type: - written\_advice: Legal opinion and recommendations - document\_review: Contract and document analysis - **Subject:** *[Required]* Advisory topic or issue - **Description:** *[Optional]* Detailed explanation of advisory need - **Requesting Department:** *[Optional]* Department requesting service - **Work Unit Advised:** *[Optional]* Specific unit receiving advice

**Assignment and Scheduling:** - **Assigned Lawyer ID:** *[Required]* Responsible legal counsel - **Request Date:** *[Required]* Date advisory was requested - **Submission Date:** *[Optional]* Date advisory was delivered

**Status Management:** - **Status:** *[Required]* Current stage: - draft: Initial preparation - in\_review: Under legal review - approved: Management approved - completed: Advisory delivered - cancelled: Request cancelled

**Document Review Specific:** - **Document Path:** *[Optional]* Original document location - **Review Notes:** *[Optional]* Analysis and recommendations - **Reviewed Document Path:** *[Optional]* Modified document location

**Tracking and Control:** - **Is Own Motion:** *[Boolean]* Self-initiated advisory flag - **Reference Number:** *[Optional]* External reference identifier

**Approval Workflow:** - **Approved By:** *[Optional]* Approving authority - **Approved At:** *[Optional]* Approval timestamp

**Closure Information:** - **Closure Notes:** *[Optional]* Final advisory summary - **Closed At:** *[Optional]* Completion timestamp - **Closed By:** *[Optional]* User completing advisory

**Related Entities:** - **Document Versions:** Track document revision history - **Advisory Stakeholders:** Internal and external parties involved: - requester: Service requestor - reviewer: Legal reviewer - approver: Final authority - recipient: Advice recipient

## Workflow and Approvals

### Case Assignment Process

1. **Supervisor Review:** New cases are reviewed for complexity and resource allocation
2. **Lawyer Assignment:** Cases assigned based on expertise and workload
3. **Notification:** Assigned lawyer receives automatic notification
4. **Acceptance:** Lawyer confirms case acceptance and begins work

### Approval Workflows

**Case Execution Approval:** - Required for initiating legal proceedings - Supervisor reviews case merit and documentation - Approval triggers court filing and formal proceedings

**Early Closure Approval:** - Required for settlements and early case termination - Financial impact assessment - Supervisor approval before case closure

**Settlement Approval:** - Multi-level approval based on settlement amount - Documentation of settlement terms - Legal review of settlement agreements

### Progress Reporting

**Regular Updates:** Lawyers provide periodic case status reports **Milestone Tracking:** Key events and deadlines monitored **Exception Reporting:** Automatic alerts for overdue tasks or missed deadlines

## Document Management

### Document Types

* **Case Documents:** Pleadings, motions, contracts, correspondence
* **Evidence:** Physical and digital evidence files
* **Court Documents:** Orders, judgments, hearing transcripts
* **Internal Documents:** Memos, analysis, strategy documents

### Version Control

* **Document Versioning:** Automatic version tracking for all documents
* **Revision History:** Complete audit trail of document changes
* **Access Control:** Role-based document access permissions

### File Management

* **Secure Storage:** Encrypted document storage with backup
* **File Organization:** Hierarchical folder structure by case and type
* **Search Capability:** Full-text search across all documents
* **Export Options:** Bulk download and archive capabilities

## Communications and Chat

### Built-in Chat System

* **Real-time Messaging:** Instant communication between team members
* **Group Conversations:** Case-specific discussion channels
* **File Sharing:** Direct document sharing within conversations
* **Message History:** Complete conversation archives

### Notification Integration

* **Chat Notifications:** Instant alerts for new messages
* **Case Updates:** Automatic notifications for case changes
* **Assignment Alerts:** New case assignment notifications
* **Deadline Reminders:** Court date and deadline alerts

## Notifications and Alerts

### Automated Notifications

**Case Assignments:** - New case assignment to lawyer - Case reassignment notifications - Workload distribution alerts

**Approval Requests:** - Execution approval requests to supervisors - Settlement approval notifications - Early closure approval requests

**Deadline Reminders:** - Court hearing reminders (configurable timing) - Filing deadline alerts - Progress update reminders

**System Notifications:** - Document upload confirmations - Status change notifications - System maintenance alerts

### Notification Channels

* **In-App Notifications:** Real-time system notifications
* **Email Alerts:** Configurable email notifications
* **Dashboard Alerts:** Centralized notification center

## Reporting and Analytics

### Case Reports

**Case Summary Reports:** - Total cases by type and status - Case age analysis and trend reporting - Recovery rate analysis by case type - Lawyer performance metrics

**Financial Reports:** - Outstanding amounts by case type - Recovery performance analysis - Cost analysis and budget tracking - Settlement vs. judgment outcomes

**Operational Reports:** - Case processing times - Court appearance tracking - Document filing statistics - Workload distribution analysis

### Analytics Dashboard

* **Key Performance Indicators (KPIs):** Visual metrics and trends
* **Interactive Charts:** Drill-down capabilities for detailed analysis
* **Export Capabilities:** PDF and Excel report generation
* **Scheduled Reports:** Automated report delivery

### Custom Reporting

* **Report Builder:** Create custom reports with drag-and-drop interface
* **Filter Options:** Advanced filtering by date, case type, lawyer, status
* **Data Export:** Multiple format options (PDF, Excel, CSV)

### Data Visualization

* **Interactive Dashboards:** Customizable dashboards for data visualization
* **Chart and Graph Options:** Various chart and graph options for data representation

## Audit Logs and Compliance

### Comprehensive Audit Trail

**User Activity Tracking:** - Login/logout activities with IP addresses - Case creation, modification, and deletion events - Document upload and access logs - Status change history with timestamps

**Data Integrity:** - Complete change history for all case data - User attribution for all system changes - Tamper-evident logging system - Backup and recovery audit trails

### Compliance Features

* **Legal Hold Management:** Document preservation for litigation
* **Privacy Controls:** Personal data access and modification logs
* **Retention Policies:** Automated data retention and archival
* **Access Reviews:** Regular review of user permissions and access

### Audit Report Generation

* **Activity Reports:** User activity summaries and detailed logs
* **Security Reports:** Access attempts and security events
* **Compliance Reports:** Regulatory compliance verification
* **Data Reports:** Data integrity and backup status reports

## System Administration

### User Management

**User Account Administration:** - Create, modify, and deactivate user accounts - Password policy enforcement and reset capabilities - Role assignment and permission management - Multi-factor authentication configuration

**Role Management:** - Define custom roles and permissions - Role-based access control implementation - Permission inheritance and override capabilities - Regular access reviews and updates

### System Configuration

**Branch and Work Unit Management:** - Organizational structure configuration - Branch-specific settings and preferences - Work unit assignment and management - Geographic and functional organization

**Case Type Configuration:** - Custom case type creation and modification - Field configuration and validation rules - Workflow customization per case type - Form layout and user interface customization

### System Maintenance

**Database Management:** - Regular database backups and integrity checks - Performance monitoring and optimization - Data archival and cleanup procedures - Disaster recovery planning and testing

**System Monitoring:** - Server performance monitoring - Application error tracking and resolution - Security monitoring and incident response - User activity monitoring and anomaly detection

### Integration and API Management

* **External System Integration:** Court systems, document management
* **API Security:** Authentication and authorization for external access
* **Data Exchange:** Secure data import and export capabilities
* **Third-party Services:** Email, SMS, and notification services

## Detailed Case Management

### Case Status Lifecycle Management

Screenshot: Case Status Lifecycle

The LCMS provides comprehensive case status management throughout the entire legal process:

#### Status Categories

* **Open:** Active cases requiring immediate attention
* **In Progress:** Cases currently being worked on
* **Under Review:** Cases pending supervisor or legal review
* **Awaiting Court:** Cases scheduled for court proceedings
* **Settlement Negotiation:** Cases in active settlement discussions
* **Appeal Process:** Cases under appeal or preparing for appeal
* **Suspended:** Temporarily halted cases
* **Closed:** Completed cases with final resolution

#### How to Update Case Status

Screenshot: Case Status Update Interface

1. **Navigate to Case Details:** Open the specific case from your dashboard
2. **Access Status Panel:** Click on the "Status" tab in the case details view
3. **Select New Status:** Choose the appropriate status from the dropdown menu
4. **Add Status Notes:** Provide detailed comments explaining the status change
5. **Attach Supporting Documents:** Upload any relevant documents supporting the status change
6. **Set Notifications:** Configure who should be notified of the status change
7. **Save Changes:** Click "Update Status" to save the changes

#### Status Change Approval Workflow

Screenshot: Status Change Approval

Certain status changes require supervisor approval:

* **Closure Requests:** All case closures must be approved by supervisors
* **Settlement Agreements:** Settlements above threshold amounts require approval
* **Case Suspension:** Temporary suspension requires justification and approval
* **Appeal Initiation:** Starting appeal process requires supervisor authorization

### Appeal Management System

Screenshot: Appeal Management Dashboard

#### Initiating Appeals

The appeal process in LCMS is comprehensive and tracks every step:

1. **Appeal Assessment:**
   * Review original case judgment or decision
   * Analyze grounds for appeal (legal errors, procedural issues, new evidence)
   * Calculate appeal deadlines and filing requirements
   * Assess probability of success and cost-benefit analysis
2. **Appeal Preparation:**

* Screenshot: Appeal Preparation Form
  + Draft notice of appeal
  + Prepare appellate brief and supporting documents
  + Compile case record and transcripts
  + Research applicable appellate law and precedents

1. **Filing Process:**
   * Submit appeal documents to appropriate appellate court
   * Pay required filing fees
   * Serve notice to opposing parties
   * Update case status to "Appeal Filed"

#### Appeal Progress Tracking

Screenshot: Appeal Timeline View

Track appeal progress through dedicated timeline:

* **Filing Deadlines:** Automated reminders for critical dates
* **Court Scheduling:** Integration with court calendar systems
* **Document Submissions:** Track all appellate briefs and responses
* **Oral Arguments:** Schedule and prepare for appellate hearings
* **Decision Tracking:** Monitor appellate court decisions and outcomes

#### Appeal Outcomes Management

* **Affirmed:** Original decision upheld - case closed
* **Reversed:** Decision overturned - case may return to lower court
* **Remanded:** Case sent back for further proceedings
* **Modified:** Decision partially changed - update case accordingly

## Advanced Case Operations

### Case Assignment and Workload Management

Screenshot: Case Assignment Dashboard

#### Automatic Case Assignment

LCMS includes intelligent case assignment features:

* **Workload Balancing:** Automatically distribute cases based on current lawyer workload
* **Expertise Matching:** Assign cases based on lawyer specialization and experience
* **Geographic Considerations:** Consider lawyer location and court jurisdiction
* **Conflict Checking:** Automatic conflict of interest detection

#### Manual Case Assignment Process

Screenshot: Manual Assignment Interface

1. **Select Case:** Choose unassigned case from the queue
2. **Review Case Details:** Analyze case type, complexity, and requirements
3. **Choose Lawyer:** Select appropriate lawyer based on availability and expertise
4. **Set Priority Level:** Assign urgency level (High, Medium, Low)
5. **Add Assignment Notes:** Provide specific instructions or considerations
6. **Notify Parties:** Send automatic notifications to assigned lawyer and stakeholders

### Document Version Control and Management

Screenshot: Document Version Control

#### Document Version Tracking

* **Version History:** Complete audit trail of all document changes
* **Change Tracking:** Detailed log of who made changes and when
* **Comparison Tools:** Side-by-side comparison of document versions
* **Rollback Capability:** Ability to revert to previous document versions

#### Collaborative Document Editing

Screenshot: Collaborative Editing Interface

* **Real-time Collaboration:** Multiple users can edit documents simultaneously
* **Comment System:** Add comments and suggestions to specific document sections
* **Review Workflow:** Structured review and approval process
* **Lock Management:** Prevent conflicting edits through document locking

### Advanced Search and Filtering

Screenshot: Advanced Search Interface

#### Comprehensive Search Capabilities

* **Full-Text Search:** Search across all case documents and notes
* **Metadata Search:** Search by case attributes, dates, and parties
* **Boolean Search:** Complex search queries with AND, OR, NOT operators
* **Saved Searches:** Save frequently used search queries

#### Advanced Filtering Options

Screenshot: Filter Panel

* **Date Range Filters:** Filter by creation date, last modified, court dates
* **Status Filters:** Filter by current case status or status history
* **Party Filters:** Search by plaintiff, defendant, or legal representatives
* **Amount Filters:** Filter by claim amounts, settlement values, or recovery amounts
* **Geographic Filters:** Filter by court jurisdiction, branch, or work unit

## System Integration Features

### Court System Integration

Screenshot: Court System Integration

#### Electronic Court Filing

* **Direct Filing:** Submit documents directly to court systems
* **Filing Status Tracking:** Real-time updates on filing acceptance/rejection
* **Court Calendar Sync:** Automatic synchronization with court scheduling systems
* **Fee Calculation:** Automatic calculation and payment of court fees

#### Court Notifications and Updates

Screenshot: Court Notifications Panel

* **Hearing Schedules:** Automatic import of court hearing schedules
* **Order Notifications:** Receive court orders and judgments electronically
* **Deadline Reminders:** Automated reminders for filing deadlines
* **Status Updates:** Real-time case status updates from court systems

### Financial System Integration

Screenshot: Financial Integration Dashboard

#### Billing and Time Tracking Integration

* **Time Tracking:** Integrated time tracking for billable hours
* **Expense Management:** Track case-related expenses and costs
* **Invoice Generation:** Automatic invoice creation based on time and expenses
* **Payment Tracking:** Monitor client payments and outstanding balances

#### Recovery and Settlement Tracking

Screenshot: Recovery Tracking Interface

* **Settlement Management:** Track settlement negotiations and agreements
* **Recovery Monitoring:** Monitor actual vs. expected recovery amounts
* **Payment Schedules:** Manage installment payment plans
* **Collection Activities:** Track collection efforts and outcomes

## Mobile Accessibility and Remote Access

### Mobile Application Features

Screenshot: Mobile App Interface

#### Mobile Case Access

* **Case Dashboard:** View case summaries and key information
* **Document Viewing:** Access and review case documents on mobile devices
* **Status Updates:** Update case status and add notes from mobile
* **Photo Capture:** Capture and upload photos directly to cases

#### Mobile Notifications

Screenshot: Mobile Notifications

* **Push Notifications:** Receive real-time alerts on mobile devices
* **Calendar Integration:** Sync court dates with mobile calendar apps
* **Offline Access:** Limited offline functionality for critical information
* **Secure Authentication:** Biometric authentication for mobile access

### Remote Work Capabilities

Screenshot: Remote Access Dashboard

#### Secure Remote Access

* **VPN Integration:** Secure connection for remote workers
* **Multi-Factor Authentication:** Enhanced security for remote access
* **Session Management:** Control and monitor remote user sessions
* **Data Encryption:** End-to-end encryption for remote communications

## Training and Support System

### User Training and Onboarding

Screenshot: Training Module Interface

#### Interactive Training Modules

* **Role-Based Training:** Customized training based on user role
* **Interactive Tutorials:** Step-by-step guided tutorials
* **Video Training:** Comprehensive video training library
* **Progress Tracking:** Monitor training completion and competency

#### Integrated Help System

Screenshot: Help System Interface

* **Contextual Help:** Context-sensitive help throughout the system
* **Search Help:** Searchable knowledge base and FAQ
* **Video Guides:** Quick video guides for common tasks
* **Live Chat Support:** Real-time support chat functionality

### System Maintenance and Updates

Screenshot: System Maintenance Dashboard

#### Automated Maintenance Features

* **Automatic Backups:** Scheduled database and file backups
* **System Health Monitoring:** Continuous monitoring of system performance
* **Update Management:** Automated system updates and patches
* **Performance Optimization:** Automatic database optimization and cleanup

#### Maintenance Scheduling

Screenshot: Maintenance Schedule

* **Scheduled Downtime:** Plan and communicate system maintenance windows
* **Update Notifications:** Advance notice of system updates and changes
* **Rollback Procedures:** Ability to rollback updates if issues occur
* **Performance Reports:** Regular system performance and health reports

## Conclusion

The Legal Case Management System (LCMS) provides a comprehensive, secure, and efficient platform for managing all aspects of legal operations. From case initiation through final resolution, LCMS ensures:

* **Complete Case Lifecycle Management:** Every case type supported with specialized workflows
* **Enhanced Collaboration:** Real-time communication and document sharing
* **Regulatory Compliance:** Complete audit trails and compliance reporting
* **Operational Efficiency:** Automated workflows and intelligent notifications
* **Data-Driven Insights:** Comprehensive reporting and analytics capabilities
* **Scalable Architecture:** Supports organizational growth and changing requirements

Whether managing complex litigation, loan recovery, or providing legal advisory services, LCMS empowers legal teams to work more effectively while maintaining the highest standards of accountability and compliance.

For technical support or additional training, contact your system administrator or refer to the technical documentation provided with your LCMS installation.