📚 Step-by-Step User Guide

Legal Document Management System

Complete walkthrough with detailed explanations

📋 Table of Contents

1. 🔐 Logging into the System

1

Open your web browser and navigate to the system URL

Type the Legal Document Management System URL in your browser address bar. Your system administrator will provide this URL.

[Screenshot: Browser address bar with system URL]

💡 **Tip:** Bookmark this URL for easy access in the future.

2

Enter your login credentials

On the login page, enter your username and password provided by your administrator.

- `Email/Username field` - Enter your assigned email address
- `Password field` - Enter your secure password

[Screenshot: Login form with email and password fields]

⚠️ **Security:** Never share your login credentials with anyone. Always log out when finished.

3

Click the Login button

After entering your credentials, click the Login button to access the system.

✅ **Success:** You should now see the main dashboard with the cases list.

2. 🧭 Understanding the Interface

1

Main Navigation Menu

The top navigation bar contains the main system functions:

- **Cases** - Main case management area
- **Search Documents** - Find documents across all cases
- **Shared Links** - Manage external document sharing
- **Audit Trail** - System activity logs (Admin only)

[Screenshot: Top navigation menu with all options highlighted]

2

User Menu

Click on your name in the top-right corner to access:

- **Profile** - View and edit your profile
- **Settings** - Personal preferences
- **System Documentation** - Access this guide
- **Logout** - Securely exit the system

[Screenshot: User dropdown menu showing all options]

3

Cases Dashboard

The main dashboard shows all cases you have access to:

- **Case Number** - Unique identifier for each case

- **Title & Description** - Case details
- **Client** - Client name
- **Status** - Current case status (Active, Pending, Closed)
- **Documents** - Number of documents in the case
- **Actions** - Quick access buttons

[Screenshot: Cases dashboard table with columns labeled]

3. 📁 Creating a New Case

1

Click the "New Case" button

From the Cases dashboard, click the + New Case button in the top-right corner.

[Screenshot: Cases page with "New Case" button highlighted]

💡 **Note:** If you don't see this button, you may not have permission to create cases. Contact your administrator.

2

Fill in the case details form

Complete all required fields in the case creation form:

Basic Information:

- `Case Title` - Descriptive name for the case
- `Description` - Detailed case description
- `Client Name` - Full client name or company

Case Classification:

- `Matter Type` - Select from dropdown (Contract, Litigation, Corporate, etc.)
- `Priority` - Low, Medium, High, or Urgent
- `Status` - Usually "Active" for new cases

Timeline:

- `Start Date` - When the case begins

- `End Date` - Expected completion date (optional)

[Screenshot: New case form with all fields labeled]

3

Assign team members

Select who will work on this case:

- `Assigned To` - Primary lawyer/paralegal responsible
- `Team Members` - Additional team members with access

💡 **Team Access:** Only assigned team members will be able to see and work with this case.

[Screenshot: Team assignment section of the form]

4

Save the case

Click the Create Case button to save your new case.

✅ **Success:** The system will generate a unique case number (e.g., CASE-20251002-123) and redirect you to the case dashboard.

[Screenshot: Success message with new case number]

4. 📤 Uploading Documents

1

Navigate to the case

From the Cases list, click Preview on the case where you want to upload documents.

[Screenshot: Cases list with Preview button highlighted]

2

Access the upload area

In the case preview, look for the document upload section on the right side of the screen.

[Screenshot: Case preview page with upload area highlighted]

3

Choose your upload method

You have two options for uploading documents:

Option A: Click to Browse

- Click the Choose Files button
- Browse your computer and select files
- Hold Ctrl (Windows) or Cmd (Mac) to select multiple files

Option B: Drag and Drop

- Open your file explorer/finder
- Drag files from your computer
- Drop them into the upload area

[Screenshot: Upload area showing both browse button and drag-drop zone]

💡 **Supported Formats:** PDF, DOC, DOCX, XLS, XLSX, JPG, PNG, GIF, TXT, and more.

4

Set document information

For each uploaded document, you can set:

Required Information:

- `Title` - Descriptive document name
- `Category` - Select from:
  - **Evidence** - Photos, exhibits, physical evidence
  - **Pleadings** - Court filings, motions, briefs
  - **Correspondence** - Letters, emails, communications
  - **Contracts** - Agreements, terms, conditions
  - **Reports** - Expert reports, investigations
  - **Other** - Miscellaneous documents

Optional Information:

- `Description` - Detailed document description
- `Tags` - Keywords for easy searching (comma-separated)
- `Confidentiality` - Public, Confidential, or Restricted

[Screenshot: Document metadata form with all fields]

⚠️ **Important:** Choose the correct category as it affects how documents appear in bundles and searches.

5

Complete the upload

Click Upload Documents to save the files to the case.

✅ **Upload Complete:** You'll see the documents appear in the case document list.

[Screenshot: Successful upload confirmation with document list]

5. 🗂️ Organizing Documents

1

Understanding categories

Categories help organize documents by type and are essential for bundle creation:

- **Evidence:** Appears first in bundles, numbered E1, E2, etc.
- **Pleadings:** Court documents, numbered P1, P2, etc.
- **Correspondence:** Communications, numbered C1, C2, etc.
- **Contracts:** Legal agreements
- **Reports:** Expert opinions and reports
- **Other:** Miscellaneous documents

> 💡 **Bundle Order:** Documents appear in bundles in the order: Evidence → Pleadings → Correspondence → Contracts → Reports → Other

2

Creating folders (if available)

Some cases may support folder organization:

1. Click New Folder in the document area
2. Enter a folder name (e.g., "Discovery Documents", "Expert Reports")
3. Drag documents into folders to organize them

[Screenshot: Folder creation dialog and folder structure]

3

Using tags effectively

Tags are keywords that make documents easier to find:

Good Tag Examples:

- **Names:** "John Smith", "ABC Corporation"
- **Dates:** "2025", "January", "Q1"
- **Subjects:** "contract dispute", "settlement", "damages"
- **Document Types:** "signed", "draft", "final"

How to Add Tags:

1. Click on a document in the list
2. Click the Edit button
3. In the tags field, enter keywords separated by commas
4. Save the changes

[Screenshot: Document edit form showing tags field with examples]

💡 **Search Power:** Well-tagged documents are much easier to find using the search function.

6. 🔍 Finding Documents

1

Using basic search

Click **Search Documents** in the top navigation menu.

[Screenshot: Navigation menu with Search Documents highlighted]

2

Enter your search terms

In the search box, you can search for:

- **Case Numbers:** CASE-20251002-123
- **Client Names:** John Smith, ABC Corporation
- **Document Titles:** Settlement Agreement
- **File Names:** contract_signed.pdf
- **Tags:** settlement, damages, expert
- **Content:** Any text within document descriptions

[Screenshot: Search page with search box and examples]

3

Advanced search techniques

Use these techniques for more precise results:

Multiple Keywords:

- `contract Smith` - Find documents containing both "contract" and "Smith"

- `evidence photo` - Find evidence documents with photos

Exact Phrases:

- `"settlement agreement"` - Find exact phrase
- `"John Smith"` - Find exact name

Category Search:

- `evidence` - Find all evidence documents
- `pleadings` - Find all court filings

[Screenshot: Search results page showing different types of matches]

4

Understanding search results

Search results show:

- **Document Title** - With matching terms highlighted
- **Case Information** - Case number and title
- **Document Type** - Category and confidentiality level
- **Actions** - View, Download, or go to Case

> 💡 **Access Control:** You only see documents from cases you have access to.

7. 📚 Creating Document Bundles

1

Navigate to case preview

From the Cases list, click Preview on the case you want to bundle.

[Screenshot: Case preview page with documents listed]

2

Review document order

Documents are automatically organized by category:

1. Evidence documents (E1, E2, E3...)
2. Pleadings (P1, P2, P3...)
3. Correspondence (C1, C2, C3...)
4. Other categories in order

> 💡 **Bundle Order:** The order shown is how documents will appear in the final bundle.

3

Configure bundle settings

Look for the Bundle Settings panel (usually on the right side):

- **Continuous Numbering** - Enable for sequential page numbers across all documents
- **Include Index** - Generate table of contents
- **Mark Inserted Documents** - Highlight documents added after original bundle

[Screenshot: Bundle settings panel with options]

4

Export the bundle

Click the Export Bundle button to generate your document bundle.

[Screenshot: Export Bundle button location]

5

Save as PDF

The system will open a new page with your bundle. To save as PDF:

1. Press **Ctrl+P** (Windows) or **Cmd+P** (Mac)
2. Select "Save as PDF" as the destination
3. Choose your file location
4. Click "Save"

✅ **Court-Ready Bundle:** Your PDF bundle includes an index, continuous page numbering, and professional formatting suitable for court submission.

[Screenshot: Print dialog showing Save as PDF option]

8. 🔗 Sharing Documents

1

Select document to share

Navigate to the document you want to share and click the Share button.

[Screenshot: Document with Share button highlighted]

2

Configure sharing settings

Set up how the document will be shared:

- `Recipient Email` - Who will receive the link
- `Expiration Date` - When the link stops working
- `Password Protection` - Optional password requirement
- `Download Limit` - Maximum number of downloads

> ⚠️ **Security:** Always set expiration dates and consider password protection for sensitive documents.

3

Send the secure link

Click Create Share Link to generate a secure URL that you can send to the recipient.

> ✅ **Tracking:** All shared document access is logged and can be monitored from the Shared Links page.

9. 🛠️ Common Issues & Solutions

1

Upload problems

File too large:

- Check the file size (usually max 50MB for documents)
- Compress PDFs or images if possible
- Contact admin if you need to upload larger files

Unsupported file type:

- Convert to a supported format (PDF, DOC, JPG, etc.)
- Contact admin to add support for specific file types

2

Search not finding documents

- Check spelling and try different keywords
- Verify you have access to the case containing the document
- Try searching by case number instead of document title
- Use broader search terms

3

Can't access a case

- Verify you're assigned to the case
- Contact the case owner or administrator
- Check if the case has been archived

4

Bundle export issues

- Ensure all documents in the case are accessible
- Try exporting smaller bundles if there are many documents

- Check that your browser allows pop-ups from the site
- Use Chrome or Firefox for best compatibility

⚠️ **Need Help?** If you continue to experience issues, contact your system administrator with:

- Your username
- The case number (if applicable)
- What you were trying to do
- Any error messages you saw

📞 Support & Resources

📋

Quick Reference

System Administrator: Contact for technical issues and access problems

Documentation: Access this guide anytime from your user menu

Training: Schedule additional training sessions as needed

💡 **Remember:** This system is designed to make legal document management easier and more secure. Take time to explore and practice with non-critical cases first.

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