

Integrate and Customize File Manager Project Specification

PROJECT SPECIFICATION

BASIC FUNCTIONAL OVERVIEW



STANDARD USER



Standard User
Completes Basic Application
Form

Basic Application Form



FUNDING REQUEST
TABLE

Funding Request ID
Standard User ID
Funding Amount Requested
Funding Type
Partner ID
Standard User bizVAULT Access Code

Standard User's
bizVAULT Status must be
"Basic Files Upload Complete"



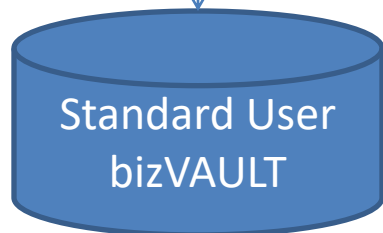
PARTNER USER

Insert Task (Deal) record in
TaskBoard Table
Insert Access Code record in
bizVAULT Access Table



PARTNER
DASHBOARD

Partner granted temporary
access to Standard User "Basic"
Files



Standard User
bizVAULT





STANDARD USER

A screenshot of the 'Standard User Online Application Form'. The form is titled 'Standard User Online Application Form' and features a progress bar at the top with seven steps: Step 1 (Contact Information), Step 2 (Company Information), Step 3 (Loan Details), Step 4 (Business Information), Step 5 (Financial Information), Step 6 (Additional Information), and Step 7 (Review). The 'Contact Information' section is currently active and includes fields for Company Name, Address, City, State, Zip Code, Website, Phone, Contact Name (Name and Title), and Email. A blue banner at the bottom of the form contains the following text:

STATUS:
In order to complete your Funding Request
Please complete uploading your basic files to your
bizVAULT

Basic Application Form

CODING NOTE:

*Basic Application Form
CAN ONLY BE SUBMITTED
After Standard User's bizVAULT Status is
"BASIC FILES UPLOAD COMPLETE"*



STANDARD USER

A screenshot of the 'Standard User Online Application Form'. The form is titled 'Standard User Online Application Form' and has a progress bar at the top with steps 1 through 7. Step 1 is highlighted. The form contains several sections: 'Contact Information' with fields for 'Company Name', 'Address', 'City', 'State', 'Zip Code', 'Website', 'Phone', 'Contact Name (C)', 'Contact Name (E)', 'Title', and 'Email'. A green 'SUBMIT' button is visible at the bottom of the form.

Basic Application Form

CODING NOTE:

*Display FORM SUBMIT BUTTON when
Standard User's bizVAULT Status is
"BASIC FILES UPLOAD COMPLETE"*

CODING TASK 0702-001

UPDATE/MODIFY BANNER ICONS

**ADD FILE MANAGER ACCESS AND
NOTIFICATION BUTTONS**

Standard User Dashboard Panel



STANDARD USER PANEL

AWT-CEP Your Small Business Success Dashboard

Anurag Singh
DREAMBUILDER CONSTRUCTION CORP
Online

- CONTRACT DETAILS
- FINANCIAL SERVICES
ACCESS TO CAPITAL
- CASH FLOW MANAGEMENT
BEST PRACTICES
- WINNING CONTRACTS
BEST PRACTICES
- FREE
SUPPORT SERVICES

\$2.6M
TOTAL REVENUES
2019
[More info](#)

4
TOTAL CONTRACTS
2019
[More info](#)

4
TOTAL SUB-CONTRACTS
2019
[More info](#)

1
TOTAL BIDS
2019
[More info](#)

PRIME CONTRACTS WON SUB CONTRACTS WON

Contract Details

Contract Number	08-0R4404
Description	Install Vegetation Control Underneath Existing Metal Beam Guard Rail
Location	08-SB4-15-R23.0/R36.2
Bid Win Date	Jun 29, 2016

Contract Amount **\$797,061** **GET FINANCING FOR THIS CONTRACT**

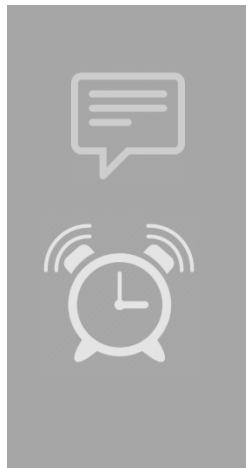
Sub-Contractors

NAME	AMOUNT	CERTIFICATION
E-NOR INNOVATIONS INC.	\$34,000	YES
DREAMBUILDER	\$555,719	YES

[View other contracts you have recently won](#)

California Small business success Copyright © 2019

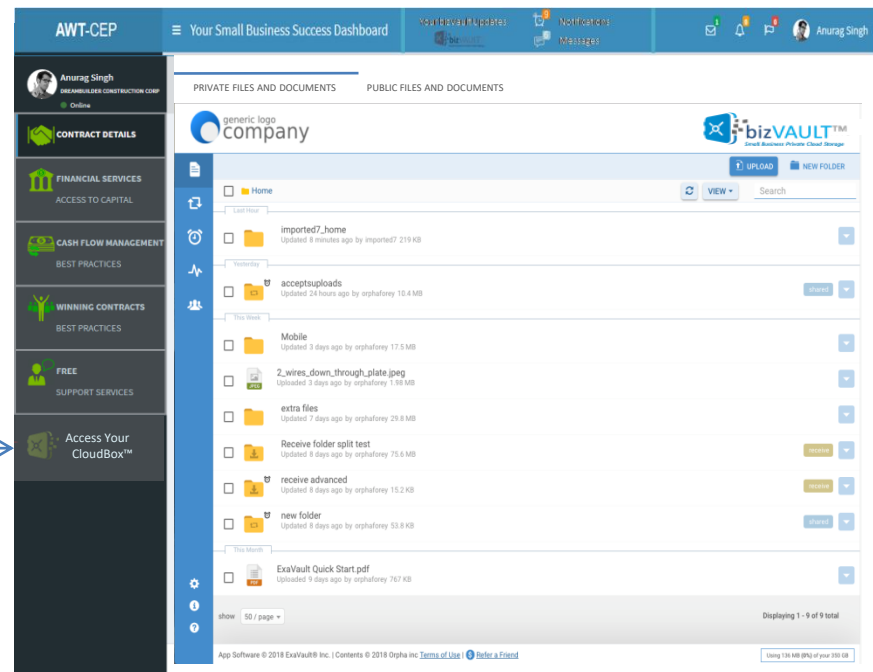
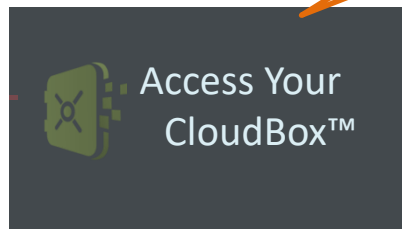
ADD CloudBox Status Banner



ADD CloudBox Notification and Message Status

Add Link and Enable CloudBox Side Panel Navigation Button

On Mouse Click
Display File Manager
Panel in Standard
User Dashboard

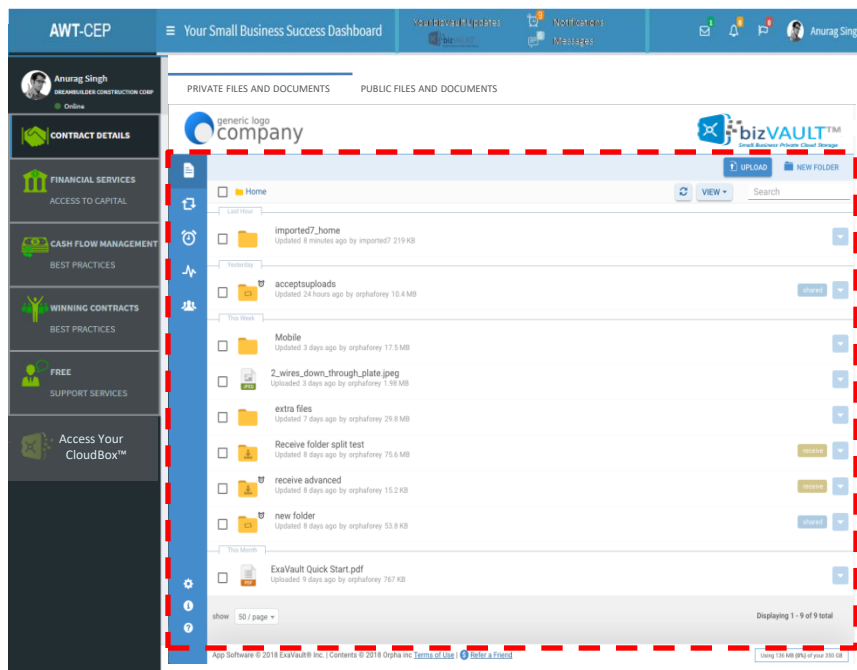


CODING TASK 0702-002

*INTEGRATE FILE MANAGER INTO
DASHBOARD*

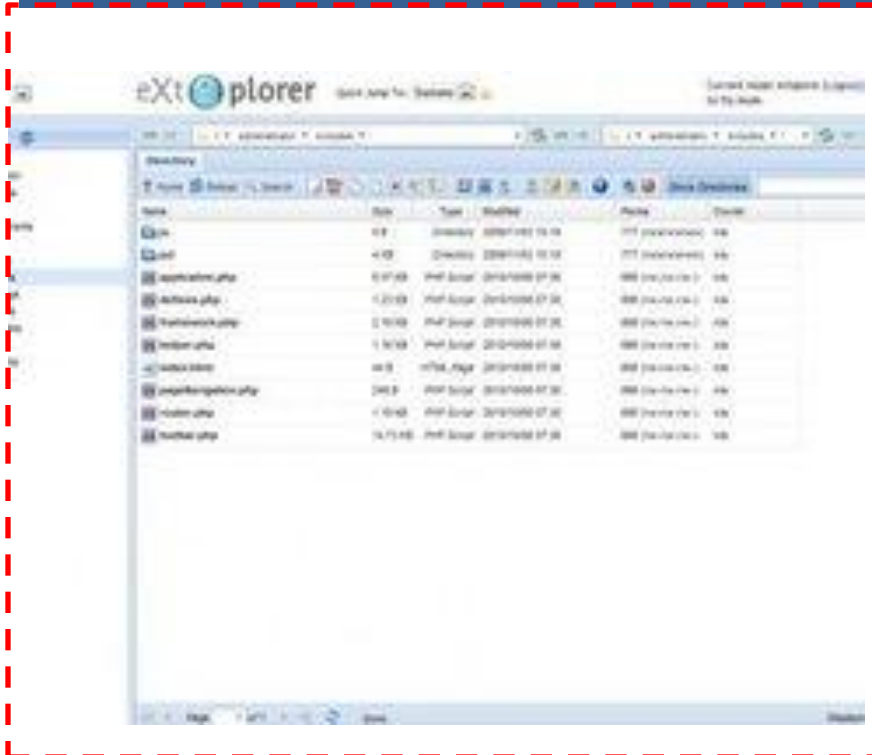
**INTEGRATE FILE MANAGER INTO
*ADMINLTE DASHBOARD TEMPLATE***

Add CloudBox Side Panel Navigation Button



Integrate File Manager into
existing Dashboard
(AdminLTE – www.adminlte.io)

eXtplorer File Manager




[exTplorer File Manager](#)









Customize File Manager User Interface


CODING TASK 0702-003

*CUSTOMIZE/MODIFY FILE MANAGER USER
INTERFACE*


**ADD SIDE NAVIGATION AND UI
ELEMENTS TO FILE MANAGER**



 **company**




☐  Home


Business Files/Documents


☐  **Basic Business Financials**
Basic business financials typically requested

☐   **Detailed Business Financials**
Detailed business financials needed for complex transactions

Personal Files/documents

☐  **Mobile**
Updated 3 days ago by orphaforey 17.5 MB

☐  **ExaVault Quick Start.pdf**
Uploaded 9 days ago by orphaforey 767 KB

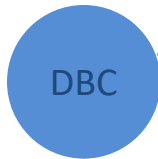


show 50 / page ▾

Displaying 1 - 9 of 9 total

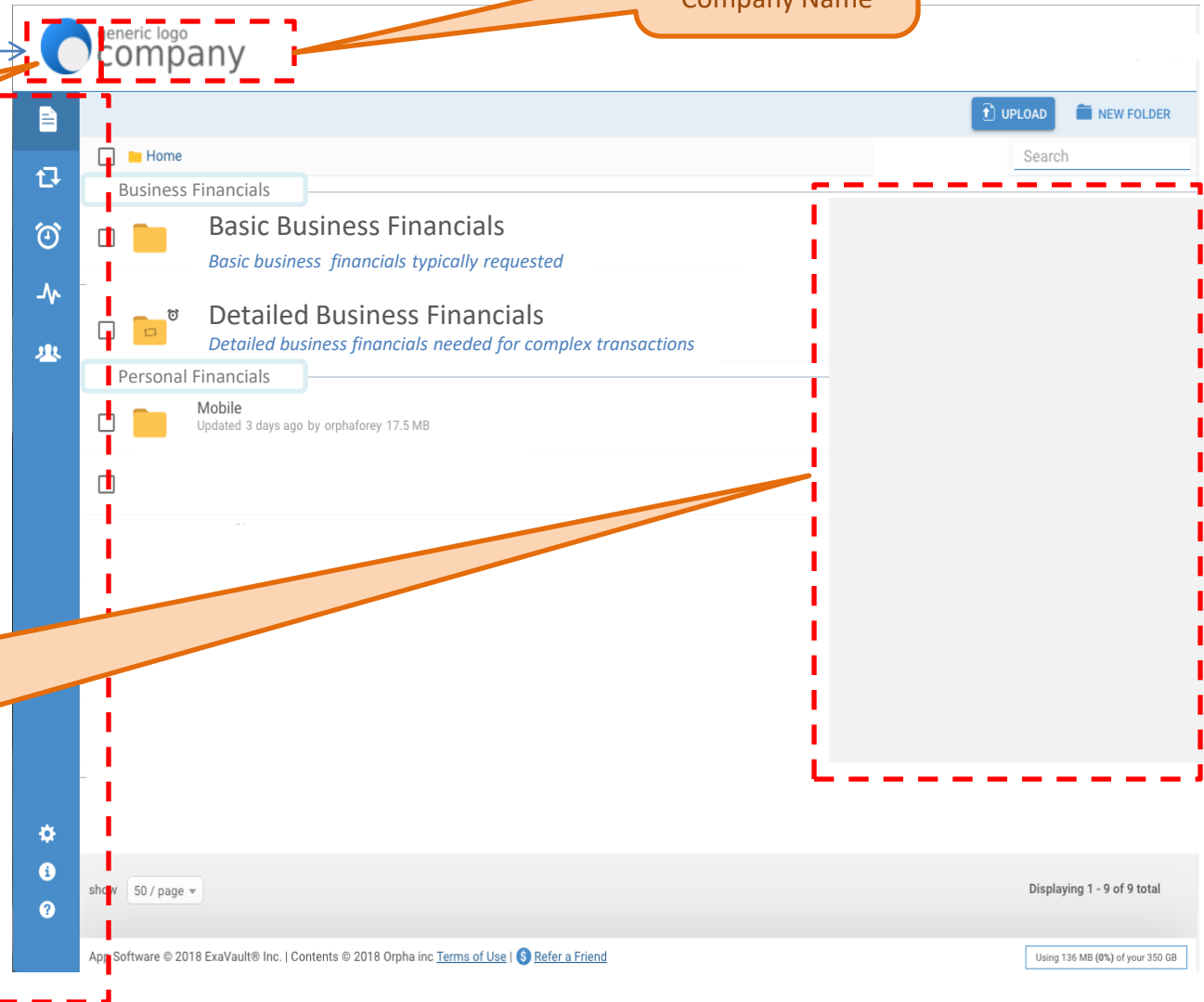
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Using 136 MB (0%) of your 350 GB



If User Business Logo **does not** exist - display Business Initials

User Name (First and Last) and Company Name



If User Business Logo exists display here. Otherwise display Business Initials

Add Side Navigation Panel

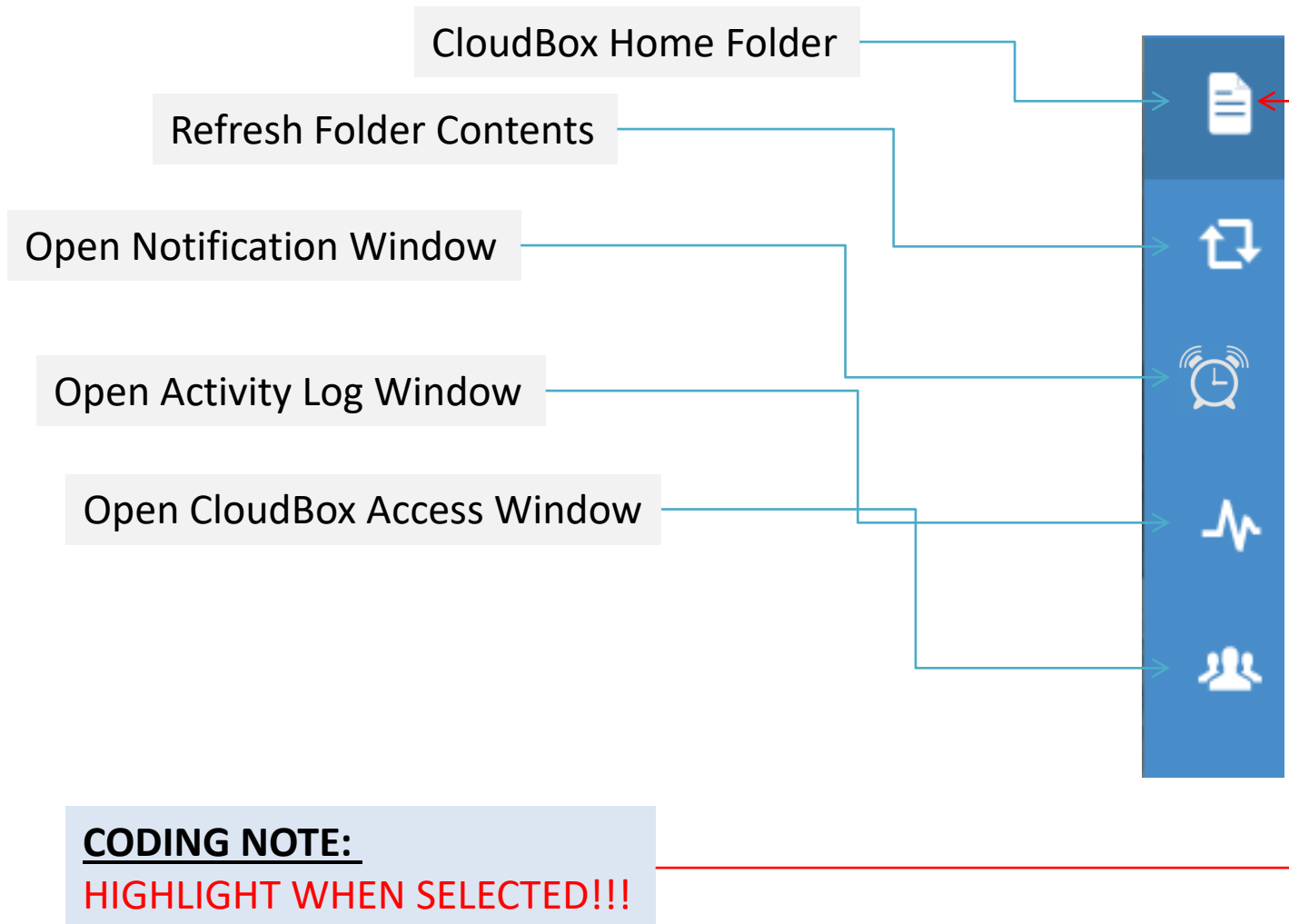
Add File and Document Preview/Detail Section
(display details on roll-over)

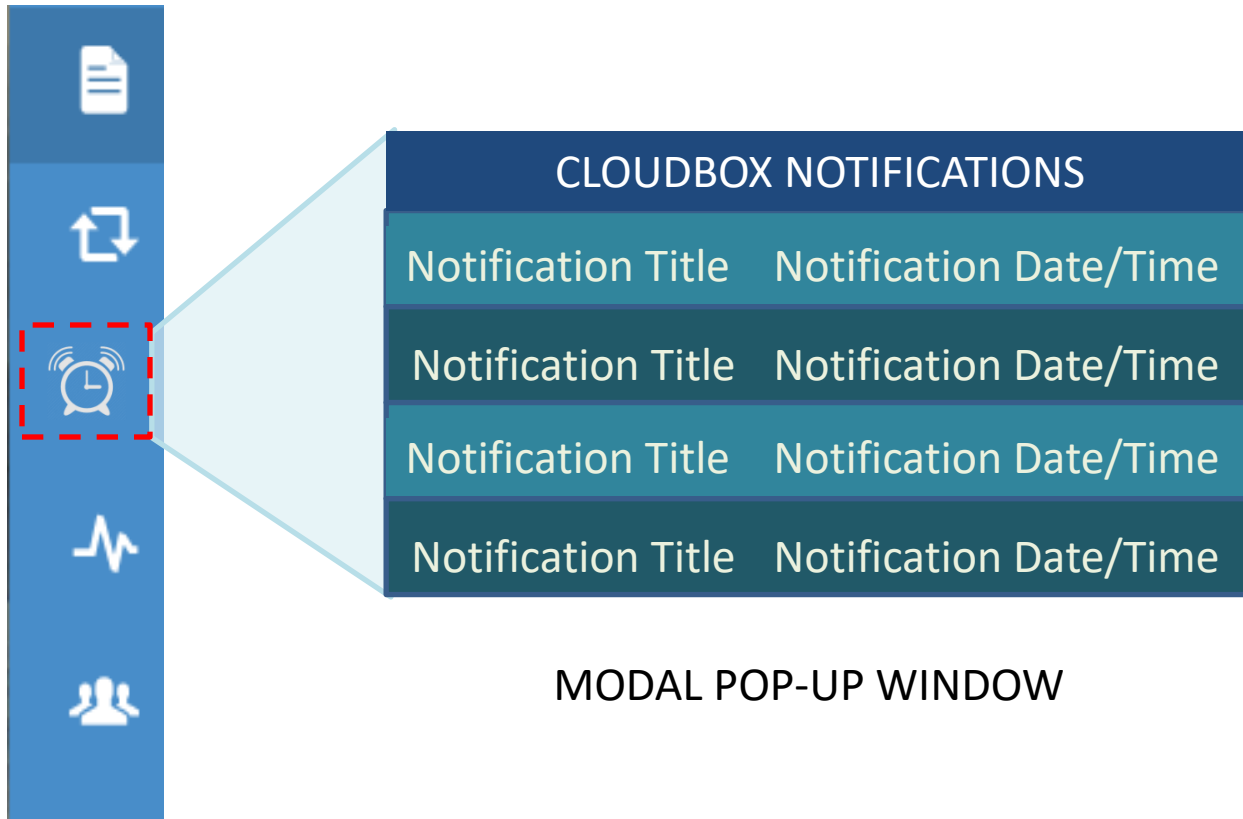
show 50 / page

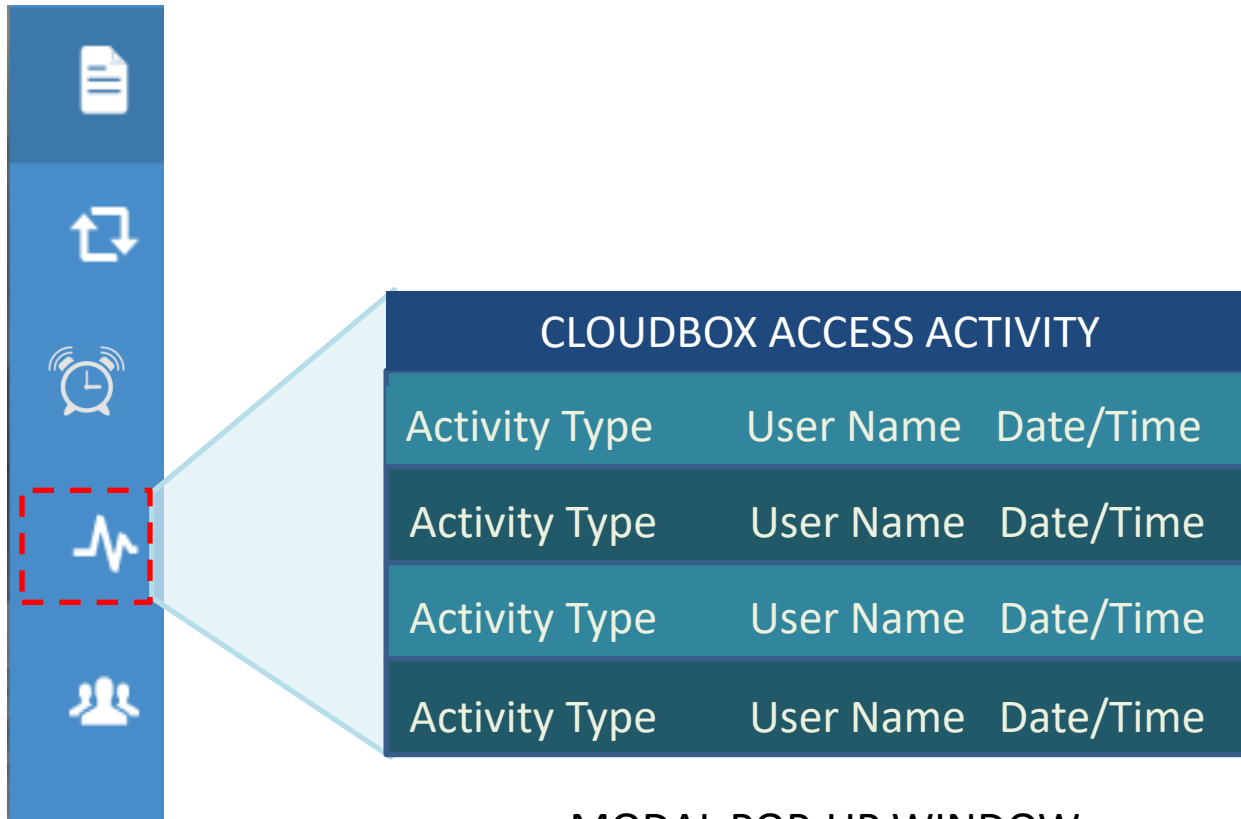
Displaying 1 - 9 of 9 total

File Manager Side Navigation

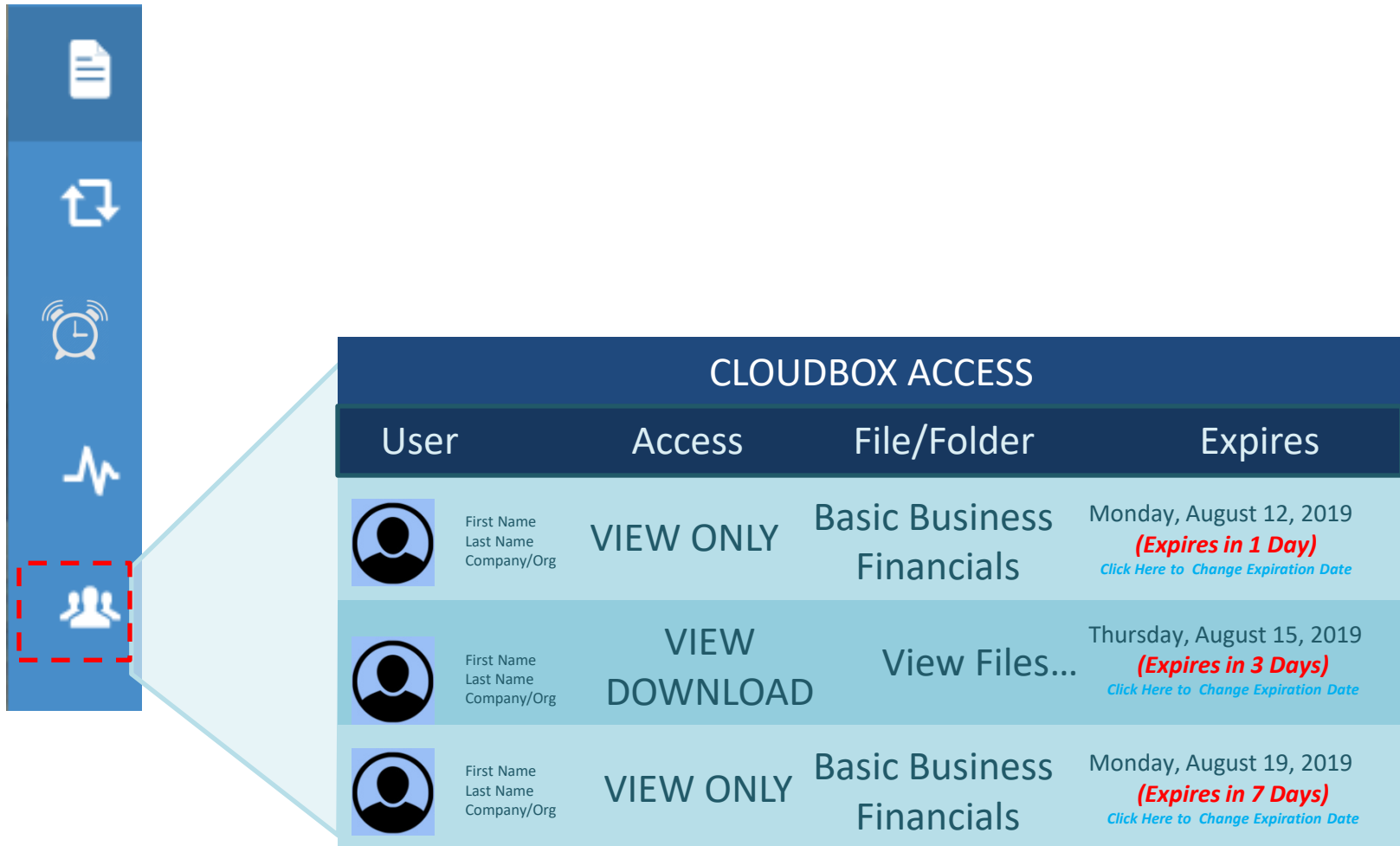
- CloudBox Home Folder
 - Displays Home Folder
- Refresh Folder Contents
 - Update/Refresh Folder Contents
- Open Notification Window
 - Display Access/Activity Notifications
- Open Activity Log Window
 - Display File/Document Activity Log
- Open CloudBox Access Window
 - Display File/Document Access/Permissions Granted







MODAL POP-UP WINDOW



MODAL POP-UP WINDOW

CODING TASK 0702-004

FILE MANAGER DYNAMIC UI LAYOUT

**USE “FILEDOC_LIST” TABLES TO AUTO
GENERATE FILE MANAGER LAYOUT**

Display Folder/File Info on Mouse Rollover

The screenshot displays the 'Private Secure CloudBox' interface for 'generic logo company'. The left sidebar contains navigation icons. The main area shows four categories, each with a list of files/folders:

- Business Files/Documents**
 - Basic Business Financials
Basic business financials typically requested
 - Detailed Business Financials
Detailed business financials needed for complex transactions
- Personal Files/Documents**
 - Mobile
Updated 3 days ago by orphaforey 17.5 MB
- Public File/Documents**
 - extra files
Updated 7 days ago by orphaforey 29.8 MB
 - Receive folder split test
Updated 8 days ago by orphaforey 75.6 MB
- Other Files/Documents**

At the bottom, it shows 'show 50 / page' and 'Displaying 1 - 9 of 9 total'. The footer includes copyright information and a storage status: 'Using 136 MB (0%) of your 350 GB'.

Each User has 4 DEFAULT
File/Document Categories

1. Business Files/Documents
2. Personal Files/Documents
3. Public Files/Documents
4. Other Files/Documents

Section
Files/Documents
By Categories:

- Business
- Personal
- Public
- Other

The screenshot displays a web-based file manager interface for 'generic logo company'. The interface includes a top navigation bar with 'UPLOAD' and 'NEW FOLDER' buttons, and a search bar. A left sidebar contains icons for file management. The main content area shows a list of files and folders, categorized into 'Business Files/Documents' and 'Personal Files/documents'. The 'Business Files/Documents' category includes 'Basic Business Financials' and 'Detailed Business Financials'. The 'Personal Files/documents' category includes 'Mobile'. The interface also features a footer with copyright information and a storage usage indicator.

generic logo
company

UPLOAD NEW FOLDER

Search

Home

Business Files/Documents

Basic Business Financials
Basic business financials typically requested

Detailed Business Financials
Detailed business financials needed for complex transactions

Personal Files/documents

Mobile
Updated 3 days ago by orphaforey 17.5 MB

show 50 / page

Displaying 1 - 9 of 9 total

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Using 136 MB (0%) of your 350 GB



UPLOAD

NEW FOLDER

Search

Home

Business Files/Documents

Basic Business Financials

Basic business financials typically requested

Detailed Business Financials

Detailed business financials needed for complex transactions

Personal Files/documents

Mobile

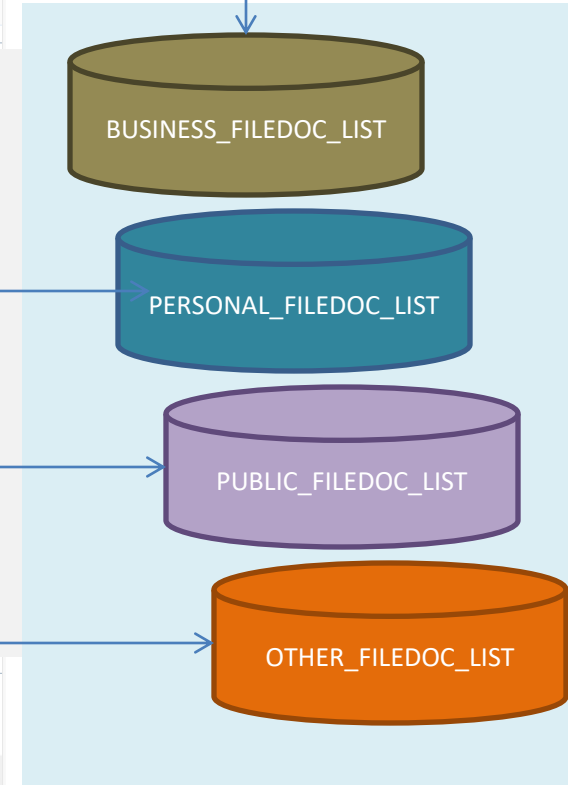
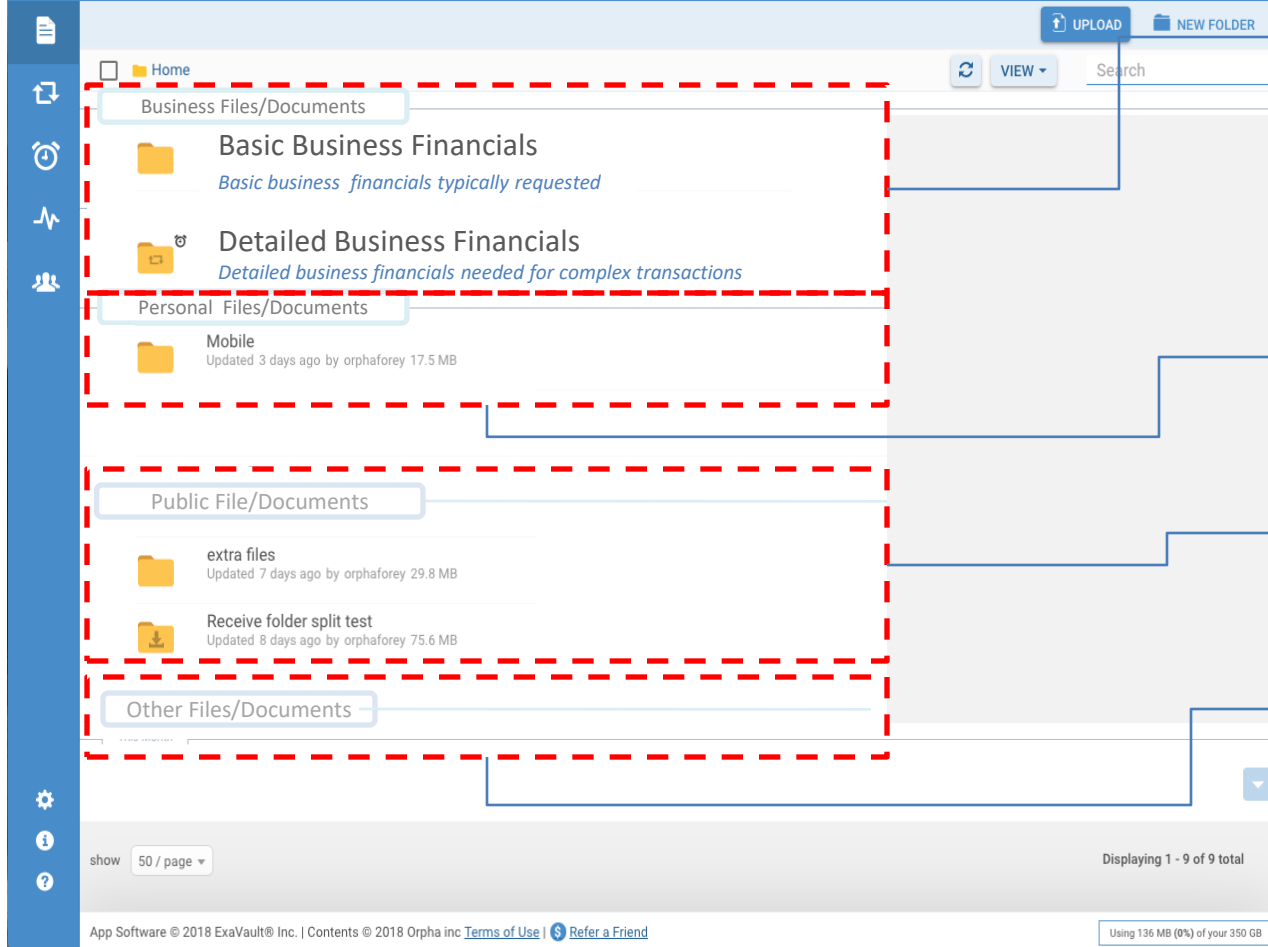
Updated 3 days ago by orphaforey 17.5 MB

show 50 / page

Displaying 1 - 9 of 9 total



USED TO CREATE FILE
MANAGER FOLDER/FILE LAYOUT



CODING NOTE:

The File Manager Folder and File Layout is based on contents of the FILEDOC_LIST tables. The entries in each table will determine any Sub-Folders and Files to be displayed.



UPLOAD

NEW FOLDER



VIEW

Search

Home

Business Files/Documents



Basic Business Financials

Basic business financials typically requested



Detailed Business Financials

Detailed business financials needed for complex transactions

Personal Files/Documents



Mobile

Updated 3 days ago by orphaforey 17.5 MB

Public File/Documents



extra files

Updated 7 days ago by orphaforey 29.8 MB



Receive folder split test

Updated 8 days ago by orphaforey 75.6 MB

Other Files/Documents

DB TABLE NAME: BUSINESS_FILEDOC_LIST

Business_FileDoc_ID	FileDoc_Type	FileDoc_Title	FileDoc_Format
2001	basic	Year1_PL_Statement	
2002	basic	Year1_PL_Statement	
2003	detailed	Year1_Taxes	
2004	detailed	Year1_CF_Statement	
2005	detailed	User_Driver_License	IMAGE

CODING NOTE:

Create Sub-Folders for each FileDoc "type" (basic, detailed, etc) listed in each FileDoc_List Table.

UPLOAD

NEW FOLDER

Home



VIEW

Search

Business Files/Documents

	2018 Balance Sheet	STATUS PLEASE UPLOAD!
	2017 Cash Flow Stmt	STATUS PLEASE UPLOAD!
	2017 Cash Flow Stmt	STATUS PLEASE UPLOAD!

DB TABLE NAME: BUSINESS_FILEDOC_LIST

Business_FileDoc_ID	FileDoc_Type	FileDoc_Title	FileDoc_Format
2001	basic	Year1_PL_Statement	
2002	basic	Year1_PL_Statement	
2003	detailed	Year1_Taxes	
2004	detailed	Year1_CF_Statement	XLSX
2005	detailed	User_Driver_License	

CODING NOTE:

If FileDoc_Format field is **EMPTY** then ANY file type is allowed.
But if FileDoc_Format field has format (such as xlsx, docx, pdf, image, etc) then User **MUST** upload the listed file format.

UPLOAD

NEW FOLDER

Home



VIEW

Search

Business Files/Documents



2018 Balance Sheet

STATUS

PLEASE UPLOAD!



2017 P and L Stmt

STATUS

PLEASE UPLOAD!



2017 Cash Flow Stmt

STATUS

PLEASE UPLOAD!

DB TABLE NAME: BUSINESS_FILEDOC_LIST

Business_FileDoc_ID	FileDoc_Type	FileDoc_Title	FileDoc_Format
2001	basic	Year1_PL_Statement	
2002	basic	Year1_PL_Statement	
2003	detailed	Year1_Taxes	
2004	detailed	Year1_CF_Statement	XLSX
2005	detailed	Year1_CF_Statement	

CODING NOTE:

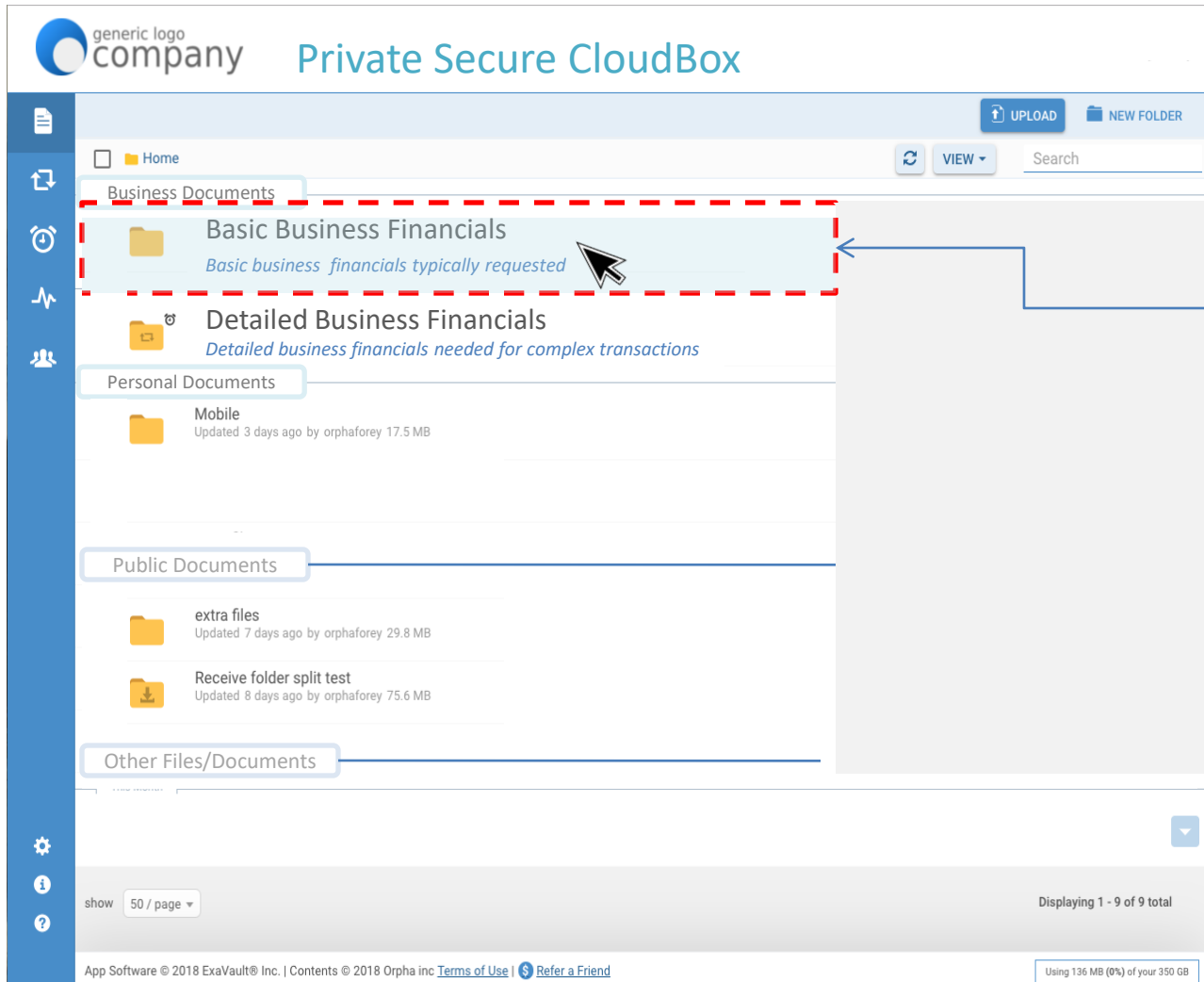
If FileDoc_Format field is **EMPTY** then ANY file type is allowed.
But if FileDoc_Format field has format (such as xlsx, docx, pdf, image, etc) then User **MUST** upload the listed file format.

CODING TASK 0702-005

FILE MANAGER USER INTERACTION AND

FILE MANAGER UI BEHAVIOUR

Display Folder/File Info on Mouse Rollover



On Mouse Roll-Over
Highlight Each Sub-Folder

Display Folder/File Info on Mouse Rollover

The screenshot displays a web-based file manager interface for "generic logo company Private Secure CloudBox". The interface includes a sidebar with navigation icons, a top bar with "UPLOAD" and "NEW FOLDER" buttons, and a main content area. The "Home" section is active, showing a list of folders. A red dashed box highlights the "Basic Business Financials" folder, which is being hovered over by a mouse cursor. A tooltip appears over the folder, displaying its name and a description: "Basic business financials requested". Below this, the "Detailed Business Financials" folder is also visible with its description: "Detailed business financials needed for complex transactions". The "Personal Financials" section shows a "Mobile" folder updated 3 days ago by "orphaforey" (17.5 MB). The "Public Documents" section shows "extra files" (updated 7 days ago, 29.8 MB) and "Receive folder split test" (updated 8 days ago, 75.6 MB). The "Other Files/Documents" section is also visible. The bottom of the interface shows a pagination bar with "show 50 / page" and "Displaying 1 - 9 of 9 total". A footer bar contains copyright information and a storage status indicator: "Using 136 MB (0%) of your 350 GB".

generic logo company Private Secure CloudBox

Home

Business Financials

Basic Business Financials
Basic business financials requested

Detailed Business Financials
Detailed business financials needed for complex transactions

Personal Financials

Mobile
Updated 3 days ago by orphaforey 17.5 MB

Public Documents

extra files
Updated 7 days ago by orphaforey 29.8 MB

Receive folder split test
Updated 8 days ago by orphaforey 75.6 MB

Other Files/Documents

show 50 / page

Displaying 1 - 9 of 9 total

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Using 136 MB (0%) of your 350 GB

On Mouse Click
Open Folder and Display Folder
Contents

CODING TASK 0702-006

*ADD DOCUMENT/FILE STATUS TO FILE
MANAGER USER INTERFACE*

**FILE MANAGER FILE/DOCUMENT UI
ELEMENTS**

Display Folder/File Info on Mouse Rollover

The screenshot displays a file manager interface for "generic logo company Private Secure CloudBox". The interface includes a sidebar with navigation icons, a top bar with "UPLOAD" and "NEW FOLDER" buttons, and a main content area showing a folder list. A red dashed box highlights a tooltip that appears on mouse rollover over the "Basic Business Financials" folder. The tooltip contains the following information:

- 3 FILES MISSING**
- PLEASE UPLOAD MISSING FILES**
- A progress gauge showing **75%** completion.

A red arrow points from the folder name in the list to the tooltip. Another red arrow points from the tooltip to a callout box on the right that reads: "On Mouse Hover Display Folder File Upload Status".

The folder list includes:

- Business Financials**
 - Basic Business Financials**
Basic business financials typically requested
 - Detailed Business Financials**
Detailed business financials needed for complex transactions
- Personal Financials**
 - Mobile**
Updated 3 days ago by orphaforey 17.5 MB
- Public Documents**
 - extra files**
Updated 7 days ago by orphaforey 29.8 MB
 - Receive folder split test**
Updated 8 days ago by orphaforey 75.6 MB
- Other Files/Documents**

The footer of the interface shows: "App Software © 2018 ExaVault® Inc. | Contents © 2018 Orpha inc [Terms of Use](#) | [Refer a Friend](#)" and a status bar indicating "Using 136 MB (0%) of your 350 GB".

Display Files and Documents stored in User's "*FileDoc*" Tables

Display Each File/Document Upload Status

Display each
document/file with
upload status info

The screenshot displays the 'Private Secure CloudBox' interface for 'generic logo company'. The main section is titled 'Business Financials' and lists 'Required Business Documents'. A red dashed box highlights the status column for four documents. A red arrow points from the text box on the left to this status column.

Document Name	Status
2017 Balance Sheet	UPLOADED
2018 Balance Sheet	UPLOADED
2017 Cash Flow Stmt	PLEASE UPLOAD!
2017 Cash Flow Stmt	UPLOADED

On the right side of the interface, a summary box indicates '1 FILE MISSING' and 'PLEASE UPLOAD MISSING FFILE'. Below this, a circular progress indicator shows '75%' completion.

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Display Folder File Upload Status Info

The screenshot displays the 'Private Secure CloudBox' interface for 'generic logo company'. The main content area shows a folder named 'Required Business Documents' containing four files. A summary overlay on the right indicates that 1 file is missing and 75% of the files are uploaded.

File Name	Status
2017 Balance Sheet	UPLOADED
2018 Balance Sheet	UPLOADED
2017 Cash Flow Stmt	PLEASE UPLOAD!
2017 Cash Flow Stmt	UPLOADED

Summary Overlay:

- 1 FILE MISSING
- PLEASE UPLOAD MISSING FILE
- 75% (indicated by a progress ring)

Footer information:

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- Using 136 MB (0%) of your 350 GB

Show Summary
Status of each
Folder

Click Empty Document Icon to Upload a missing File/Document

On Mouse Click
Display File Upload
PopUp Window

generic logo company Private Secure CloudBox

Home

Business Financials

Required Business Documents		
	2017 Balance Sheet	STATUS UPLOADED
	2018 Balance Sheet	STATUS UPLOADED
	2017 Cash Flow Stmt	STATUS PLEASE UPLOAD!
	2017 Cash Flow Stmt	STATUS UPLOADED

1 FILE MISSING

PLEASE UPLOAD MISSING FFILE

75%

EvaVault Quick Start.pdf

show 50 / page

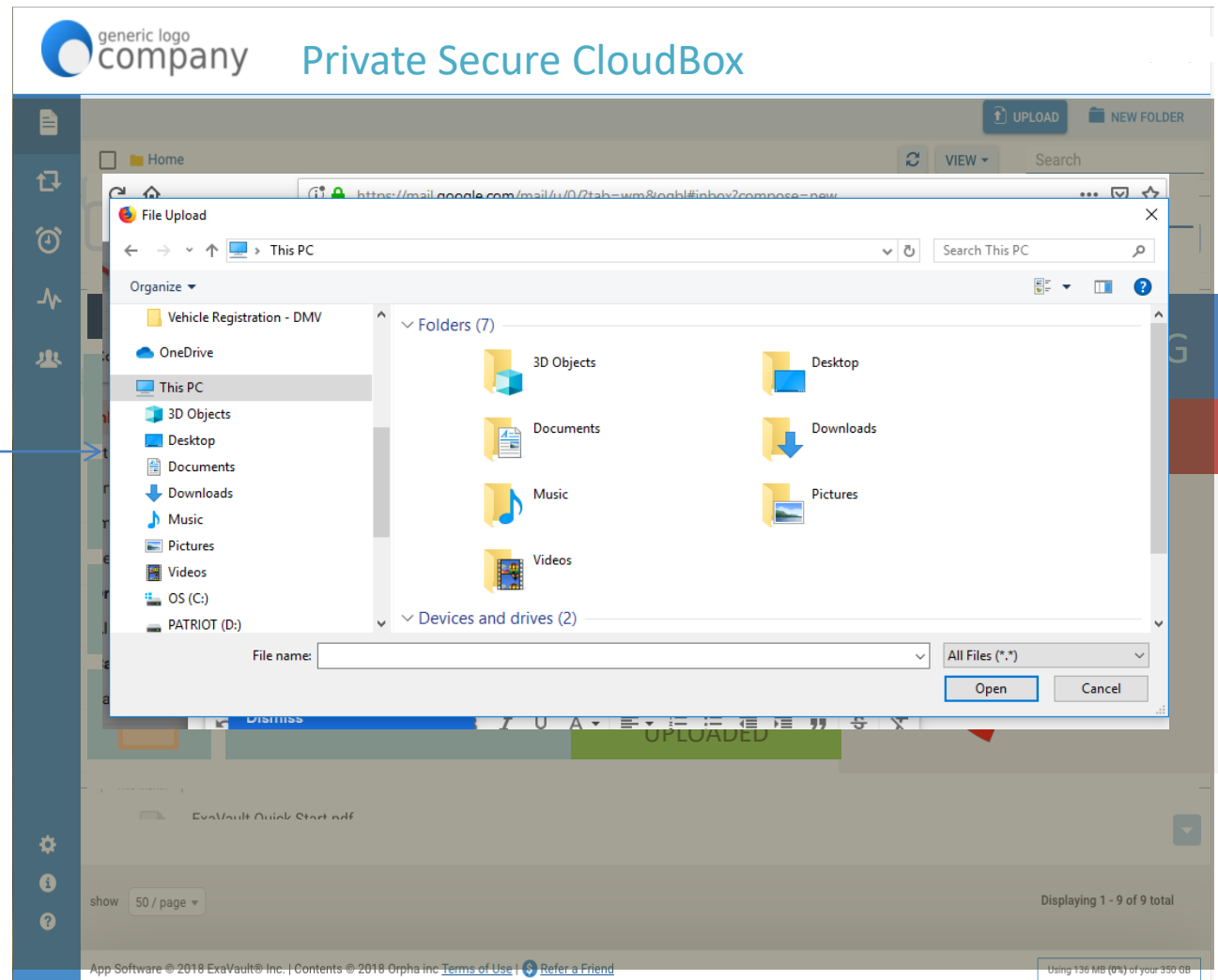
Displaying 1 - 9 of 9 total

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Using 136 MB (0%) of your 350 GB

Upload File to CloudBox

Allow for direct upload
or “drag and drop”
from local computer







DISPLAY STATUS AS
“BASIC FILES UPLOAD
COMPLETED”
WHEN ALL BASIC FILES ARE
UPLOADED

generic logo company Private Secure CloudBox

Home

Business Financials

Required Business Documents	
	2017 Balance Sheet
	2018 Balance Sheet
	2017 Cash Flow Stmt
	2017 Cash Flow Stmt

STATUS
UPLOADED
UPLOADED
UPLOADED
UPLOADED

BASIC FILES UPLOAD COMPLETED
ALL BASIC FILES HAVE BEEN UPLOADED

100 %

Displaying 1 - 9 of 9 total

Using 136 MB (0%) of your 350 GB

CODING NOTE:

After all BASIC files are uploaded – display status as 100%

CODING TASK 0702-007

File Manager File Upload User Interface

**FILE MANAGER FILE/DOCUMENT
UPLOAD**

Click Empty Document Icon to Upload a new file

The screenshot displays the 'Private Secure CloudBox' interface. At the top, there's a header with a 'generic logo company' and the title 'Private Secure CloudBox'. Below the header, a navigation bar includes an 'UPLOAD' button and a 'NEW FOLDER' button. A search bar is also present. The main content area is titled 'Business Financials' and lists 'Required Business Documents'.

Document Icon	Document Name	Status
	2017 Balance Sheet	UPLOADED
	2018 Balance Sheet	UPLOADED
	2017 Cash Flow Stmt	PLEASE UPLOAD!
	2017 Cash Flow Stmt	UPLOADED

On the right side, a summary box indicates '1 FILE MISSING' and 'PLEASE UPLOAD MISSING FILE'. A circular progress gauge shows '75%' completion. The bottom of the interface includes a footer with copyright information and a link to 'Terms of Use'.

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Using 136 MB (0%) of your 350 GB

Click Empty Document Icon to Upload a new file

If file is missing – display
“Missing File” Icon and
show status as “Please
Upload”

generic logo company Private Secure CloudBox

Home

Business Financials

Required Business Documents

		STATUS
	2017 Balance Sheet	UPLOADED
	2018 Balance Sheet	UPLOADED
	2017 Cash Flow Stmt	PLEASE UPLOAD!
	2017 Cash Flow Stmt	UPLOADED

1 FILE MISSING

PLEASE UPLOAD MISSING FILE

75%

show 50 / page

Displaying 1 - 9 of 9 total

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Using 136 MB (0%) of your 350 GB

Click Empty Document Icon to Upload a new file

Show status summary for each Folder along with *number of files missing* and *percent completed graph*

The screenshot displays the 'Private Secure CloudBox' interface for 'generic logo company'. The main content area shows a folder named 'Business Financials' containing a table of 'Required Business Documents'.

Document Icon	Document Name	Status
	2017 Balance Sheet	UPLOADED
	2018 Balance Sheet	UPLOADED
	2017 Cash Flow Stmt	PLEASE UPLOAD!
	2017 Cash Flow Stmt	UPLOADED

A callout box on the right, titled '1 FILE MISSING', provides a summary for the folder. It includes the text 'PLEASE UPLOAD MISSING FILE' and a circular progress graph showing 75% completion. A red arrow points from the callout box to the 'Business Financials' folder header.

At the bottom of the interface, there is a footer with the following information:

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- Using 136 MB (0%) of your 350 GB

Click Empty Document Icon to Upload a new file



On Mouse Click –
expand to
Display File
Properties and
Access Controls

generic logo company Private Secure CloudBox

Home

Business Financials

Required Business Documents

	STATUS
 2017 Balance Sheet	UPLOADED
 2018 Balance Sheet	UPLOADED
 2017 Cash Flow Stmt	PLEASE UPLOAD!
 2017 Cash Flow Stmt	UPLOADED

VIEW
DELETE
GRANT ACCESS

UPLOADED 02-05-2019 FILE SIZE 02-05-2019 FILE TYPE 02-05-2019

1 FILE MISSING
PLEASE UPLOAD MISSING FILE

75%

show 50 / page ▼

Displaying 1 - 9 of 9 total

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Using 136 MB (0%) of your 350 GB

Click Empty Document Icon to Upload a new file

On Mouse Click –
expand to
Display File
Properties and
Controls

generic logo company Private Secure CloudBox

Home

Business Financials

Required Business Documents

	STATUS
2017 Balance Sheet	UPLOADED
2018 Balance Sheet	UPLOADED
2017 Cash Flow Stmt	PLEASE UPLOAD!

VIEW
DELETE
GRANT ACCESS

UPLOADED 02-05-2019 FILE SIZE 02-05-2019 FILE TYPE 02-05-2019

STATUS
UPLOADED

STATUS
UPLOADED

STATUS
UPLOADED

1 FILE MISSING
PLEASE UPLOAD MISSING FFILE

75%

Displaying 1 - 9 of 9 total

Using 136 MB (0%) of your 350 GB

Click Empty Document Icon to Upload a new file

Each User can view, delete and grant access to folders or individual files

The screenshot displays the 'Private Secure CloudBox' interface. The main content area shows a list of 'Required Business Documents' with the following details:

Document Name	STATUS	UPLOADED	FILE SIZE	FILE TYPE
2017 Balance Sheet	UPLOADED	02-05-2019	02-05-2019	02-05-2019
2018 Balance Sheet	UPLOADED			
2017 Cash Flow Stmt	PLEASE UPLOAD!			

A callout box highlights the 'VIEW', 'DELETE', and 'GRANT ACCESS' buttons for the first document. The right sidebar shows a progress gauge at 75% and a warning: '1 FILE MISSING. PLEASE UPLOAD MISSING FFILE'. The bottom status bar indicates 'Displaying 1 - 9 of 9 total' and 'Using 136 MB (0%) of your 350 GB'.

CODING TASK 0702-008

Customize File Manager User Interface

**FILE MANAGER FILE/DOCUMENT
ACCESS, STATUS AND DETAIL INFO**


Folder Access Controls

On **Folder** mouse click,
display Folder Access
Menu (**View Access and
Grant Access**)

The screenshot displays the 'Private Secure CloudBox' interface. A red arrow points from the 'Business Files/Documents' folder to a dashed red box containing two buttons: 'VIEW ACCESS INFO' and 'GRANT ACCESS'. The interface includes a sidebar with icons for Home, Upload, View, and Search. The main content area shows a list of files with their status.

File Name	Status
2018 Balance Sheet	UPLOADED
2017 Cash Flow Stmt	PLEASE UPLOAD!
2017 Cash Flow Stmt	UPLOADED

At the bottom, there is a footer with copyright information and a status bar indicating 'Using 136 MB (0%) of your 350 GB'.

 generic logo
company

Private Secure

Home

Business Financials

VIEW ACCESS INFO

2018 Balance Sheet

2017 Cash Flow Stmt

2017 Cash Flow Stmt

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User	Access	File/Folder	Expires
 <div>First Name Last Name Company/Org</div>	VIEW	Business Financials	Monday, August 11, 2019 <i>(Expires in 1 Day)</i>
 <div>First Name Last Name Company/Org</div>	VIEW DOWNLOAD	View Files...	Monday, August 13, 2019 <i>(Expires in 3 Days)</i>
 <div>First Name Last Name Company/Org</div>	VIEW	Business Financials	Monday, August 18, 2019 <i>(Expires in 7 Days)</i>

UPLOADED

STATUS
PLEASE UPLOAD!

STATUS
UPLOADED



☐ Home

UPLOAD

NEW



VIEW

Search

Business Financials

VIEW ACCESS INFO

GRANT ACCESS



2018 Balance Sheet

STATUS

UPLOADED



2017 Cash Flow Stmt

STATUS

PLEASE UPLOAD!



2017 Cash Flow Stmt

STATUS

UPLOADED



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Enter User Access Request ID

SELECT ACCESS LEVEL ▼

SELECT ACCESS EXPIRATION ▼

CODING NOTE:

*If Access Code Not Found
Display Error Message*

The screenshot displays the 'Private Secure CloudBox' interface. A callout box highlights the 'GRANT ACCESS' button and the resulting error message 'ACCESS CODE NOT FOUND'. The interface includes a sidebar with navigation icons, a top header with the company logo, and a main content area with a table of financial documents.

generic logo company Private Secure CloudBox

Home

Business Financials

VIEW ACCESS INFO GRANT ACCESS

		STATUS
	2018 Balance Sheet	UPLOADED
	2017 Cash Flow Stmt	STATUS PLEASE UPLOAD!
	2017 Cash Flow Stmt	STATUS UPLOADED

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456YUX-2YU

ACCESS CODE NOT FOUND

SELECT ACCESS LEVEL ▼

SELECT ACCESS EXPIRATION ▼



Private Secure CloudBox



☐ Home

Business Financials

VIEW ACCESS INFO

GRANT ACCESS



2018 Balance Sheet

STATUS

UPLOADED



2017 Cash Flow Stmt

STATUS

PLEASE UPLOAD!



2017 Cash Flow Stmt

STATUS

UPLOADED



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Enter User Access Request ID



First Name
Last Name
Company/Org

SELECT ACCESS LEVEL ▼

VIEW ONLY
VIEW AND DOWNLOAD



☐ Home

Business Financials

VIEW ACCESS INFO

GRANT ACCESS



2018 Balance Sheet

STATUS

UPLOADED



2017 Cash Flow Stmt

STATUS

PLEASE UPLOAD!



2017 Cash Flow Stmt

STATUS

UPLOADED



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Enter User Access Request ID



First Name
Last Name
Company/Org

SELECT ACCESS LEVEL ▼

SELECT ACCESS EXPIRATION ▼

1 DAY
3 DAYS
5 DAYS
1 WEEK

CODING NOTE:




*If Access Code Found
Display Granted User's Info*

generic logo
company Private Secure CloudBox

Home

Business Financials

VIEW ACCESS INFO GRANT ACCESS

	2018 Balance Sheet	STATUS UPLOADED
	2017 Cash Flow Stmt	STATUS PLEASE UPLOAD!
	2017 Cash Flow Stmt	STATUS UPLOADED

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44521X-YU3

 First Name
Last Name
Company/Org

DOWNLOAD






5 DAYS

OK CANCEL

generic logo

company

Private Secure CloudBox







Home

Business Financials

VIEW ACCESS INFO

GRANT ACCESS

	2018 Balance Sheet	STATUS UPLOADED
	2017 Cash Flow Stmt	STATUS PLEASE UPLOAD!
	2017 Cash Flow Stmt	STATUS UPLOADED


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Display

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44521X-YU3

First Name
Last Name
Company/Org

DOWNLOAD

5 DAYS

OK

CANCEL

Business_FileDoc_Access TABLE

Business_FileDoc_Access_ID
Business_FileDoc_ID
FileDoc_Access_Created_UserID
Access_Type (View, Download)
Access_Granted_UserID
Access_Expiration_Date
Access_Creation_Date

File Manager Cloud Storage

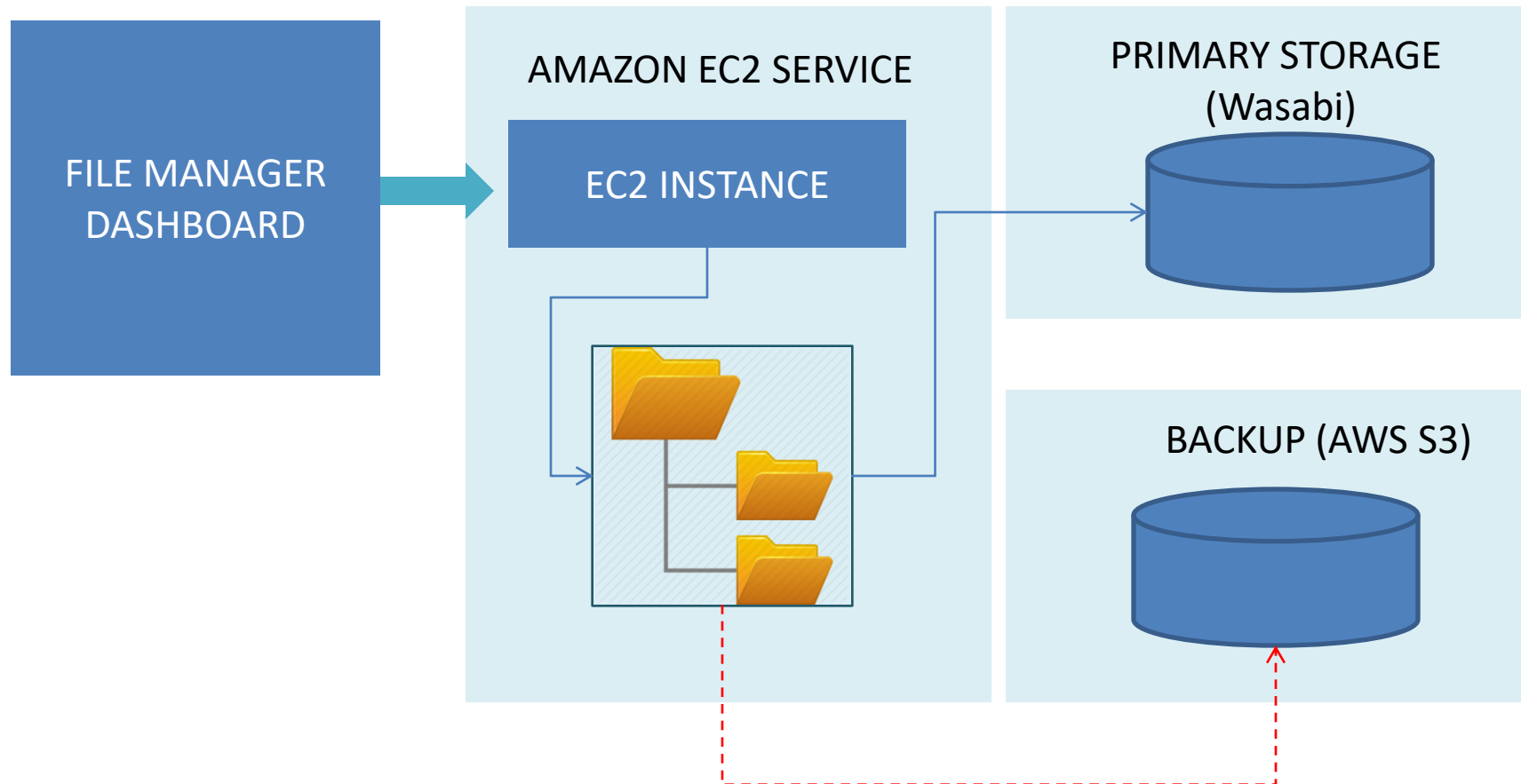
**BACKEND CLOUD STORAGE
INTEGRATION (WASABI/AWS S3)**

CloudBox File Storage

- File storage for each user's CloudBox will use AWS S3 and Wasabi Storage Services
- Amazon AWS EC2 will be used to access Cloud Storage
- WASABI will serve as Primary Storage
- AWS S3 will serve as BackUp Storage

CODING AND CONFIGURATION NOTE:

- *Cloud Storage access control will be implemented via File Manager Front-end and associated DB tables. There is no need to implement access control on Cloud Storage as the File Manager User Interface will be used to implement and manage file permissions and access.*



File Manager

**CLOUD STORAGE OBJECTS AND DB
TABLE MAPPING**

UPLOAD

NEW FOLDER

Home



VIEW

Search

Business Files/Documents

- Basic Business Financials**
Basic business financials typically requested
- Detailed Business Financials**
Detailed business financials needed for complex transactions

Personal Files/Documents

- Mobile**
Updated 3 days ago by orphaforey 17.5 MB

Public File/Documents

- extra files**
Updated 7 days ago by orphaforey 29.8 MB
- Receive folder split test**
Updated 8 days ago by orphaforey 75.6 MB

Other Files/Documents

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Wasabi/S3 Storage



BUSINESS



PERSONAL

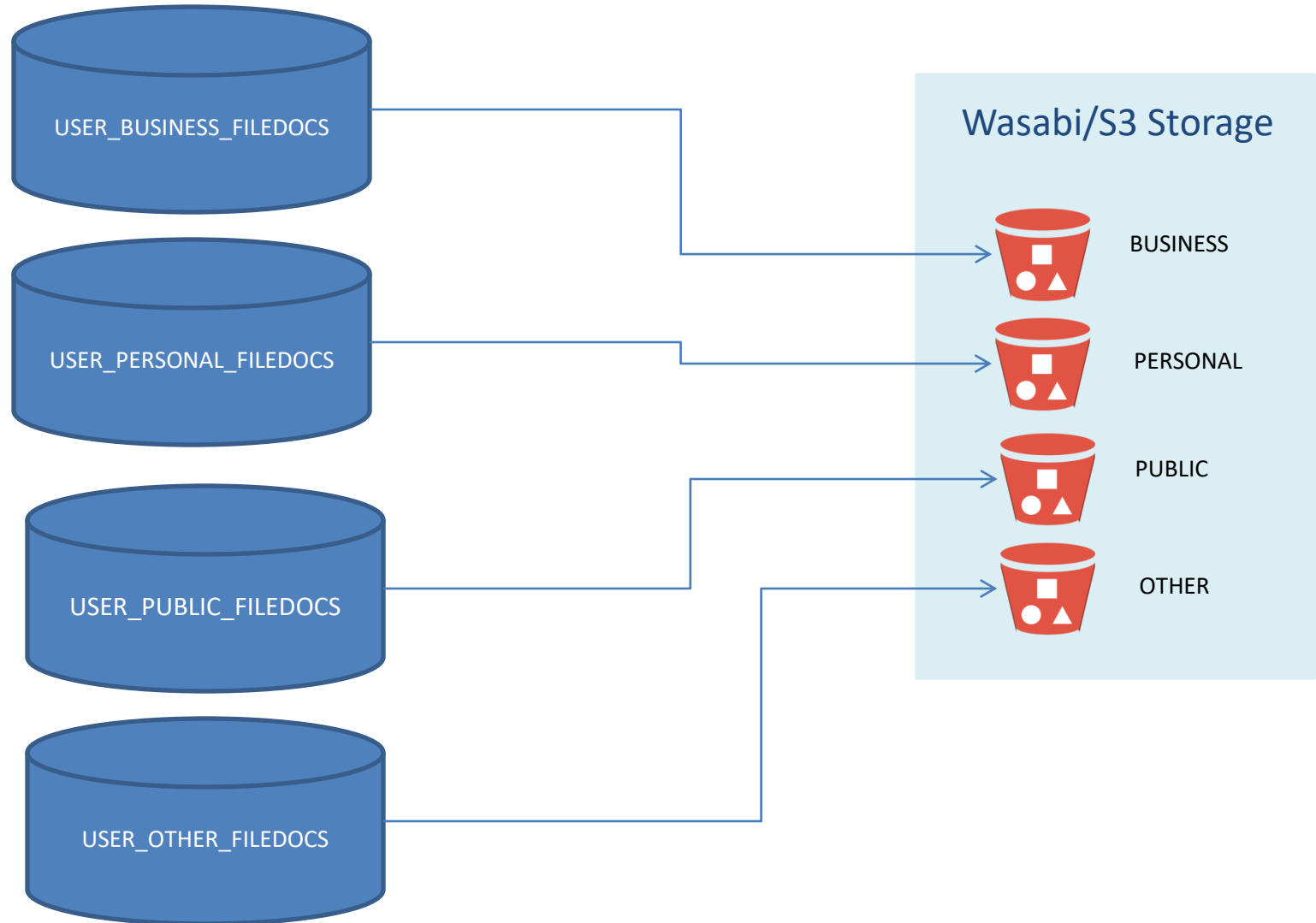


PUBLIC



OTHER

USER FILEDOC DB TABLES



UPLOAD

NEW FOLDER

Home



VIEW

Search

Business Files/Documents

	2018 Balance Sheet	STATUS UPLOADED
	2017 Cash Flow Stmt	STATUS PLEASE UPLOAD!
	2017 Cash Flow Stmt	STATUS UPLOADED

Use API to
retrieve files

DB Table Name

USER_BUSINESS_FILEDOCS

Wasabi/S3 Storage



BUSINESS



PERSONAL



PUBLIC



OTHER

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Cloud Storage

Bucket/Object to DB Table Mapping

- Use Standard [S3 Bucket/Object naming](#) to create and access User Documents
 - Naming Convention
 - Bucket→UserID→Object-Filename
 - Example *“business/400345-Year1_PL_Statement”*

DB TABLE NAME: USER_BUSINESS_FILEDOCS						
FileDoc_ID	UserID	BucketName	ObjectName	DateUploaded	Type	Version
8001	400345	business	Year1_PL_Statement	07-19-2019	Basic	1
8002	400332	business	Year1_PL_Statement	07-11-2019	Basic	1
8003	400377	personal	Year1_Taxes	07-03-2019	Detailed	2
8004	400345	business	Year1_CF_Statement	07-19-2019	Detailed	1

CloudBox

BACKEND SCRIPT DETAILS

CloudBox User Roles



STANDARD USER

Upon on-board Standard Set of Folders are created for each Standard User. These folders CANNOT be deleted or changed by Standard User (only Admin). All Private Files are encrypted (on upload, transfer and at rest). All Private Files can only be created, deleted and access/viewed by Standard User unless Standard User grants access .

Standard User Actions

- *Uploads files/Documents to CloudBox*
- *Creates “custom” Folders*
- *Set Access Levels and Permissions*
- *Grants Access and Sets Access Expiration*

CloudBox User Roles



PARTNER (SERVICE PROVIDER) USER

Service Provider Users are granted access to Basic Files/Documents and Request Access to Special/Private Files/Documents.

PARTNER (Service Provider) User Actions

- *Granted Access to “Basic Files” (when Standard User submits Service Request)*
- *Can Request Access to “Detailed/Other” Files and Documents*
- *Receives Access Level (View Only, Download) from each Standard User*
- *Files and Document Access and Access Levels Expire*

CloudBox User Roles



ADMIN USER

Admin Users can manage Standard User's Folders – but cannot access or view Standard User files WITHOUT permission granted from the Standard User. They Also CANNOT set Access or Permission Levels – as these are only set by Standard Users when access requests are made.

Admin User Actions

- *View Access Levels*
- *View Service Provider Access Permissions*
- *View Access Granted*
- *View Access Expiration*
- *View Access Activities (Standard and Service Provider User)*

PROJECT MILESTONES

- **Milestone 1**

- **Integrate and Customize File Manager Script**

- Integrate/Add File Manager module to existing Dashboard Template Layout (*AdminLTE* – www.adminlte.io)
 - Customize File Manager UI per Project Specification Document
 - Create and perform Unit Test and generate QA/Test Report

PROJECT MILESTONES

- **Milestone 2**

- **Implement Access Control functionality per User Roles**

- Create User Roles and Access Permissions DB Tables
 - Create Folder, File/Document DB Mapping Table (*for S3 Bucket/Object linking*)
 - Code/Develop Access Control module (php)
 - Integrate Access Control code w/ Dashboard UI for each User type (*Standard User, Service Provider User, Admin User*)
 - Create and perform Module, Dashboard/UI QA Test and generate QA/Test Report

PROJECT MILESTONES

- **Milestone 3**
 - **Implement Cloud Storage (Wasabi/S3) via API backend functionality**
 - Setup/Configure EC2 configuration for Wasabi/S3 access
 - Create Wasabi/S3 sample Bucket/Objects (Client provides login credentials)
 - Setup/Configure API support (via PHP SDK)
 - Develop/Implement File/Document CRUD functionality via Wasabi/S3 API calls
 - Development/Implement File/Document Backup from Wasabi to AWS S3
 - Integrate/Replace File Manager “server side” file system functionality with Wasabi/S3 Folder, File/Document functionality via API calls
 - Create test cases for each User Type, perform Unit QA/Test and generate QA/Test Reports