



Prudent File Share Portal



1. Document Control

Revision History

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1.0	27-July-2018	First Draft	Manager Technology

Approvals & Reviewed By:-

This document has been reviewed and approved by the following members.

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2. Purpose of the Project

Background of the Requirement

Prudent Insurance Brokers as a part of their business at times needs certain bulk details from its clients for various business transactions mainly related to insurance claims or sales. At present Clients use various types of tools to share this information which also include third party file sharing sites like 'wetransfer' however these methods do not follow any authentication mechanisms hence not secure and poses a potential threat of data leakage and data loss as well.

Goal of the Project

Prudent, therefore, wants to give its Clients and employees an easy to use however secure file transfer and sharing portal which addresses to the mentioned security issues and threats thereby keeping this critical data safe and secure.

This solution will also offer complete control on the data being received and shared using this portal and will also keep full logging of various activities being performed on the portal and publish the same to the client and employees thereby controlling ambiguities and offering full visibility of file sharing process.

3. The Client, the Customer and other Stakeholders

- a. The Client: Organization for whom this portal will be build herein Prudent Insurance Brokers
- b. The Customer: Organization and People who will use this portal herein Prudent External Clients and Employees.
- c. The Stakeholders: People whose inputs are required to build this project herein Prudent Technology Team.

4. User Roles

- Administrators: Admin responsible for Users Management, Adding and Modifying permissions and features and Service management.
- External Clients: Registered External Clients who can upload the files and mark the same to particular internal employee(s) and can view the logs of files being uploaded by them.
- Internal Users: Registered Internal users are the ones who can view, download and share the files being uploaded for them by the external clients. They will also be able to archive files if deemed not required or on reaching respective disk quota.

5. Scope of Work

- Creating a File sharing portal offering facilities of primarily uploading and sharing files as per user roles along with archiving functionality as per need.
- Obtain an Internet Address
- Hiring VM/space for web-hosting
- Registering users.
- Service Maintenance.
- Training

6. Scope of the Portal Development

This portal should have following features.

- User Accounts: Role based Portal personal areas where users can login, upload or share files, view logs or perform administrative activities as per the roles defined.
- File Upload allowing external and internal users to upload files.
- File Sharing allowing only internal users to share files amongst people within the organization and pre-registered on the portal.
- File Archive allowing internal users to archive files if deemed not required or if reaching quota.
- File Quota a configurable property setting disk quota for various internal users.
- Activity Log which will be used to trace and tracking activities of various users.
- Informatory Mails giving users information about the files being shared by internal users and uploaded for them by external clients and also for giving successful/unsuccessful confirmation of the file upload activity performed by external clients.

7. Portal Features and Functional Flows

File sharing Portal as the name suggest will be used to share files amongst Clients and Employees of the Prudent. Typically, Prudent's Clients using their logins will upload the files as per the need of business transactions for a particular employee which respective employee will be able to see using his own login and make use of those files. The employee will also have the ability to share the files amongst other users within Prudent as per need basis.

The Portal will have following features.

- Logins for Administrator, External Clients and Users and its management. Each type of user will have different login screens as per identified role.
- Administrator will only be able to register users whether external or internal.

- Integration with Active Directory for internal user registration is also the part of the scope.
- The registration process involves setting up the login id, email of a particular user along with her/his role definition.
- Once registered, an automatic mail will be sent to the particular user along with a one-time password which he will use to login on the portal and setup his own password. The password complexity and expiration will be in sync with Prudent Password policy.
- User logins will be of two types. The type of role and functional characteristics are defined below.
 - External Client Login: These will be the Clients of Prudent who will only be able to upload file and mark it to the specific individual Employee of the Prudent. The personalized space of this user will have only two options
 - Upload File: User will be able to browse the file to be uploaded and mark the same to an individual employee of Prudent only by specifying his mail id (domain name of id will always be prudent and will remain constant) in a provisioned space. The file will get uploaded to the designated space of that particular employee. External Client should not be able to put any other email-id except Prudent's employees. An email will be sent to the Employee notifying her/him about file being uploaded for her/him. An email confirmation about successful / unsuccessful upload will also be sent to External user.
 - View Log: System will maintain the log of every activity performed on the portal by any user. This option will allow external user to see the record of file being uploaded by him in a specific date or time interval. Therefore this option will give facility of selecting date/time interval for which the log needs to be searched and viewed. The log will at least show information as stated in below example

Upload Date	Filename	Uploaded For
27-07-2018	Claim.xlsx	Julia.Marsh@prudent.com

- Password Change Option to change password.
- Internal User Login: These will be the Employees of Prudent who will be able to download and share the file uploaded by external client amongst internal Prudent's employees. These users will also be able to upload a file themselves to be shared with another of his peer within the organization however the other internal user with whom file is being shared should also be the registered user of this portal. This login will have following options
 - Once login, user will be able to see the list of all files being uploaded for him by external client or as shared by his own peer within the organization along with details and a download button as per the example format below

Date	Filename	Upload/Shared By	Last Downloaded	
26-07-2018	Claim.xlsx	Julia.Marsh@prudent.com	27-07-2018	<Download>

- Upload File: User will be able to browse the file to be uploaded and will have option either to mark the same to another peer or upload the file to its own designated space. An email will be sent accordingly either to the another peer informing him about the file being shared with him and successful/unsuccessful notification to the user himself in case user uploaded the file and marked it to one of his peer or just the successful/unsuccessful intimation to the user himself if the file is just being uploaded to the user's designated space itself.
 - Password Change Option to change password.
 - There will be a widget to intimate user about his disk space usage.
 - Archive File: User will also have the option to archive files if needed for any reason like file not required or reaching disk quota, through which user can select the files to be archived and give confirmation for the archiving. Once archived user will not be able to see the file in the list of files. The archived files will go to the archive area which will be maintained user wise wherein the files will stored in the compressed format.
- Administrative Login: Designated Administrative login will have following options
- Register User option that will be used by administrator to register external clients and internal users with mandatory fields of user-id, password, email, company and phone
 - Archived File Access through which administrator can retrieve the archived files for an internal user as requested by the user.
 - View logs for all users for tracing and tracking purposes.
 - View Overall Disk Status including archive space for administrative control.
 - Widget for Individual Disk usage Alert