# PolicyCraft – User Manual

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### 1. Setup

1. Clone repository, create virtual env.
2. pip install -r requirements.txt.
3. Start MongoDB (brew services start mongodb-community).
4. python app.py → visit http://127.0.0.1:5000/.

Demo baseline data (user\_id = -1) already present.

### 2. Typical Workflow

| Step | Action | Result |
| --- | --- | --- |
| 1 | Log in / register | Dashboard list |
| 2 | Upload Policy PDF/DOCX | Row appears, status → Ready |
| 3 | Open analysis | Radar, themes, classification |
| 4 | Generate Recommendations | Cards with priority/timeframe/sources |
| 5 | Validate Citations | Modal with pass/⚠️ |
| 6 | Export CSV | File download |

### 3. Screen Elements Explained

* **Classification** pill: Restrictive (red), Moderate (amber), Permissive (green). Derived by Hybrid classifier (rule + LLM). Confidence bar shows probability.
* **Priority badge**: High (red ≥0.75), Medium (amber 0.4–0.74), Low (green).
* **Timeframe**: Immediate / Short / Long term.
* **Sources list**: academic references.
* **Validate Citations**: checks whitelist + publication age ≤7 yrs.

### 4. Example Validation Report

Citation Validation Report  
✅ Establish Multi-Stakeholder… – pass  
⚠️ Implement Graduated Oversight – UNLISTED: BERA (2018)

Interpretation: first rec OK; second rec cites reference missing from whitelist.

### 5. Database & Algorithm Overview

* **Recommendation retrieval order**: current user → baseline → any user → generate ad-hoc.
* **Classifier**: BERT probs adjusted by rule layer → label + confidence.
* **Theme extractor**: spaCy NER + TF-IDF weighting.
* **Validator**: normalises strings, checks whitelist & year.

### 6. Supported File Types

PDF, DOCX, TXT (English, ≤10 MB).

### 7. Interpretation Examples

* Dashboard Moderate @ 55 % → ambiguous wording, manual review advised.
* Avg themes per policy 9.5 → broad coverage.
* Validation ⚠️ UNLISTED → add reference to docs/academic\_references.md.

### 8. FAQ

Q: Adjust 7-year threshold?  
A: Call validate\_recommendation\_sources(recs, max\_age=<yrs>).

Q: Where are files stored?  
A: Temporarily under uploads/, deleted after parse; text lives in Mongo.

Q: Add logo or colours?  
A: Edit static/css/theme.css, place SVGs in static/img/brands/.

Q: “No themes extracted”?  
A: Document too short; tweak MIN\_TOKEN\_COUNT.

Q: Undo delete?  
A: Use Mongo shell to restore or re-upload.

Q: External APIs?  
A: None at runtime; future semantic check may call Crossref.

Q: Multi-user?  
A: Yes; baseline user -1 is shared.

Q: Run tests?  
A: pytest -q tests/.

Q: Export validation?  
A: CLI validate\_sources.py --csv out.csv.

Q: Change priority thresholds?  
A: Edit PRIORITY\_RULES in recommendation/engine.py.

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