

## Workflows

### ❖ Document Scanning and Upload Workflow

- Initiator: User scans and uploads a document.
- Actions:
  - Add metadata (e.g., file name, category).
  - Save to a designated folder.
  - Automated Steps:
    - Run OCR for text extraction.
    - Notify users with access permissions of new uploads.

### ❖ File Approval Workflow

- Initiator: User submits a document for approval.
- Actions:
  - Approver receives a notification.
  - Approver reviews and either approves, requests changes, or rejects.
- Escalations: Unattended approvals escalate to a higher authority after a set period.

### ❖ Search and Retrieval Workflow

- Initiator: User initiates a search query.
- Actions:
  - Apply filters such as metadata, date, or keywords.
  - Display results with sorting and relevance ranking.
- Automated Steps:
  - Show related files based on access patterns.

### ❖ Access Control and Sharing Workflow

- Initiator: User requests access to or shares a document.
- Actions:
  - Admin reviews access requests.
  - System grants or denies permissions based on user roles.
- Automated Steps:
  - Notify relevant parties of changes in access.

## ❖ Backup and Recovery Workflow

- Initiator: System automatically performs backups at scheduled intervals.
- Actions:
  - Ensure encrypted storage of backup files.
  - Restore files upon user request in case of data loss.
- Automated Notifications: Inform users of backup completions or recovery actions.

## ❖ Analytics Reporting Workflow

- Initiator: Admin requests system activity reports.
- Actions:
  - Select report type (usage, access patterns, etc.).
  - Generate and display visualized data.
- Automated Steps:
  - Schedule recurring reports for specific periods.

## Roles and Permissions

### → Admin

#### ◆ Permissions:

- Full access to all files and folders.
- Create, modify, or delete workflows.
- Manage user roles and permissions.
- View and manage system logs and reports.

#### ◆ Workflow Responsibilities:

- Approve or deny access requests.
- Oversee escalated workflows.

### → Manager

#### ◆ Permissions:

- Access to team-specific files and workflows.
- Approve or reject files for workflows they manage.
- Generate reports for their team.

#### ◆ Workflow Responsibilities:

- Handle escalated approvals within their domain.

→ Standard User

◆ Permissions:

- Upload and tag documents within allowed categories.
- View and retrieve files they have permission to access.
- Request access to restricted documents.

◆ Workflow Responsibilities:

- Initiate file approval or access request workflows.

→ Viewer

◆ Permissions:

- View files and metadata without editing permissions.
- Comment on files if enabled.

◆ Workflow Responsibilities:

- None; observational role only.