



WISDOM AI®

FILE MANAGEMENT SCREEN: DESIGNER GUIDELINES

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1. File Organization and Categorization

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- Ability to organize files into categories like:
- Employee Files (CV, Contracts, ID copies, performance reviews).
- Training Records (Certificates, evaluations).
- Policies & Handbooks (Company guidelines, SOPs).
- Compliance Documents (Visa, work permits, tax records).

2. Access Control and Permissions

- Role-based access (e.g., HR, L&D manager, department heads).
- Ability to assign access rights per file, folder, or category.
- Tracking who added or edited a file.

3. Version Control

- Maintain file version history for policies, contracts, or critical documents.
- Option to restore previous versions when needed. (if possible)

4. Search

- Advanced search options based on file name, type, upload date, employee name, employee ID, Department, etc.

5. File Sharing

- Secure file sharing within the organization.
- Notifications when a file is shared or accessed.

6. Audit Logs

- Track uploads, downloads, edits, and deletions for compliance.
- Maintain a detailed activity log (if possible).

2. Advanced Features

1. Integration with Modules

- Auto-link documents to respective modules (e.g., attaching Visa, WP card, etc., copies directly under their profile).

2. Automated Alerts

- Notifications for expiring documents (e.g., work permits, contracts).

3. Bulk Upload and Export

- Bulk upload feature for onboarding multiple employees.
- Export specific documents in ZIP format for audits or external sharing.

4. Document Templates

- Preloaded templates for common HR files (e.g., NDAs, offer letters, grievance forms).

5. Encryption and Security

- AES 256-bit encryption for stored files.

6. Upload Options

- Upload files directly from a local device.
- Drag-and-drop functionality.

3. File Upload Process

1. Single “Upload Document” Button:

- Users click this button to start uploading a file.
- Once the file is selected, the upload begins with a progress bar.

2. Post-Upload Prompt:

- After the file is successfully uploaded, a prompt asks: “Would you like to process this file as a scanned document for enhanced clarity?”
- Options: Save as Standard | Enhance and Save

3. Location Prompt:

- Please ask the user where to save the document

4. Processing Flow:

- **Save as Standard:** The file is saved as-is in the file management system.
- **Enhance and Save:** The file is processed via integrated scanning technology (third-party API) and then saved in the scanned format.

4. Uncategorized Documents Section

Process Flow

1. Dashboard Section: “Uncategorized Documents”

- A dedicated widget or section on the dashboard to display all files uploaded but not assigned to any folder or category.
- Key details are shown for each document:
 - File Name
 - Upload Date
 - Uploaded By (if multiple users can upload)

2. Categorization Process (Action Button)

- The system lists all pre-existing folder names (created by the user) in a dropdown or folder tree view.
- HR selects one of the folders.
- Once a folder is selected:
 - First, prompt a message. Asking Are you sure? If the user clicks Yes then;
 - The file is automatically moved from the “Uncategorized” list to the selected folder.
 - A success notification confirms the action (e.g., “File has been successfully moved to the [Folder Name] folder.”).
- The file no longer appears in the “Uncategorized Documents” section.

3. Bulk Categorization

- Allow HR to select multiple files and assign them to a single folder in one action.

5. Folder Creation and Access Control

1. Automated Folder Creation and Access Control

- Folder Naming and Generation:
 - Automatically generate employee-specific folders using the format: [Employee ID]_[Employee Name] (e.g., A1234_Amey).
 - These folders are created at the time of subscription onboarding or whenever new employees are added to the system.
- Access Rights:
 - The folder is automatically linked to the respective employee, allowing them to view and access documents via the mobile application.
 - HR/admin users retain full control over folder contents and subfolder creation.

2. Subfolder Management

- HR-Managed Subfolders:
 - HR can create subfolders under each employee's folder for categorization (e.g., CV, Passport, Visa, Medical Records).
 - Employees only see the documents but cannot modify them, maintaining document integrity.

3. Public Folder for Shared Documents

- Public Folder Structure:
 - A "Public Documents" section is created for company-wide access.

- HR can organize public documents into subfolders, such as company policies, employee handbooks, training materials, employment laws, etc.
- Custom Access Rules:
 - HR assigns access at different levels:
 - Everyone: All employees can view the document (e.g., handbook).
 - Department-Wise: Only specific departments can access (e.g., safety guidelines for engineering).
 - Position-Wise: Specific roles access specialized documents (e.g., leadership guides for managers).

4. Dynamic Updates

- The system dynamically updates the folder structure when:
 - New employees join the organization.
 - Employees change departments or positions (updating access levels).
 - Employees leave the company (folders archived and access removed).

6. Dashboard

1. HR Dashboard

- Total Documents Uploaded:
 - Total number of documents uploaded in the system (including both employee-specific and organizational files).
- Documents Pending Categorization:
 - Number of documents that are not yet assigned to a folder (uncategorized documents waiting for HR to organize).
- Documents by Category:
 - Breakdown of documents by category/folder (e.g., CVs, Visas, Work Permits, Medical, Insurance, etc.).
- Documents Expiring Soon:
 - Total number of documents approaching expiration (Visa, Passport, Contracts, etc.) and their expiry dates.
- Employee Document Completion Status:
 - Number of employees who have completed all required document uploads (e.g., visa documents, ID, etc.) vs. those who are missing essential documents.
- Total Folders Created:
 - Total number of folders created (both employee-specific and public folders).

Please refer to the screenshots included in the folder.

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