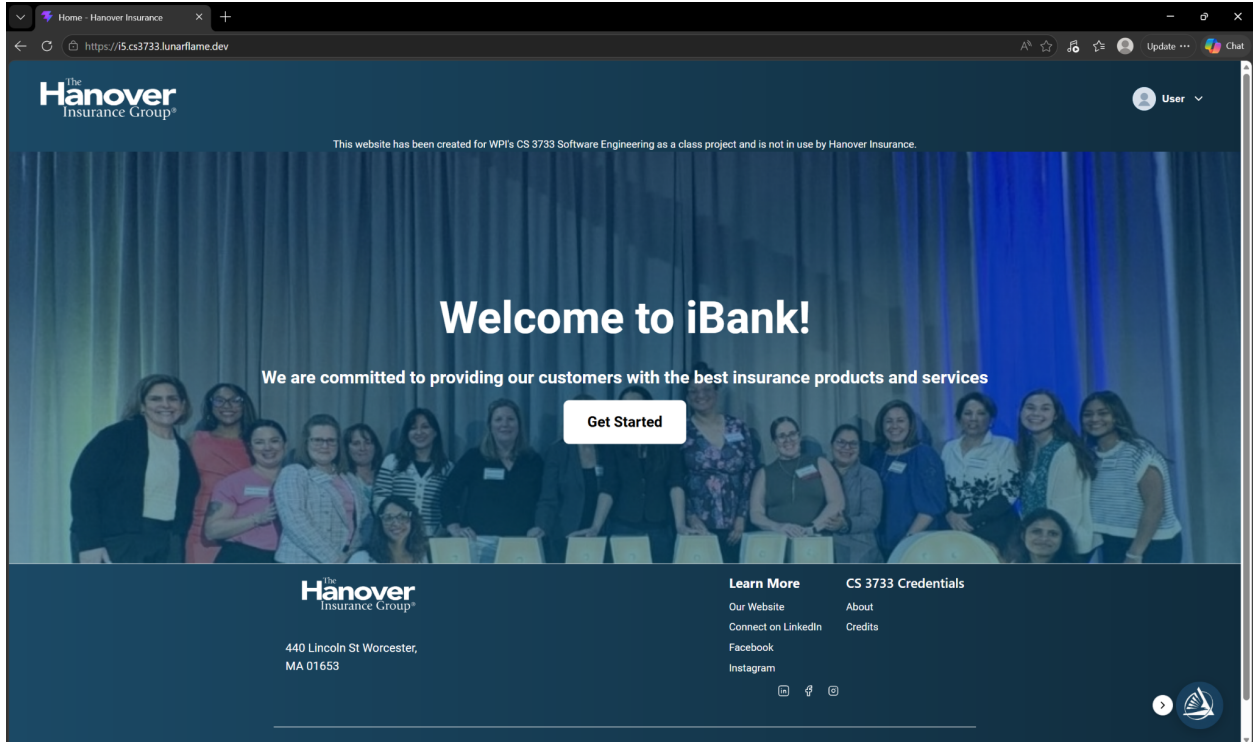


## Home Page

When first opening iBank, you will be directed to our home page (Figure 1). Due to being logged out, you have limited access to a few of the iBank features, until you login by clicking the “Get Started” Button.

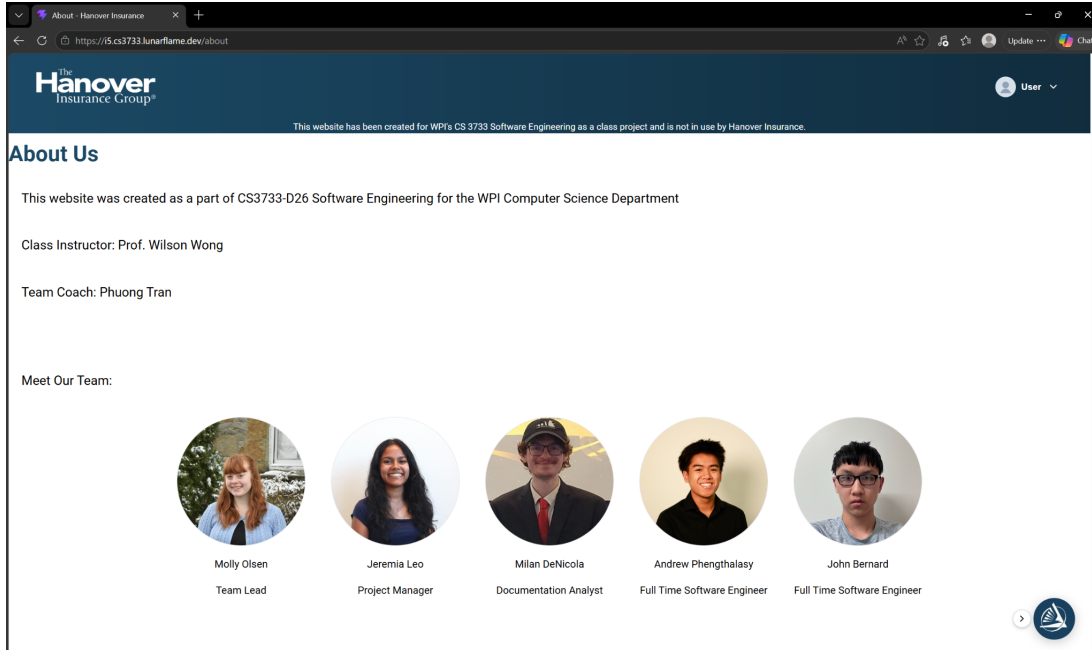


As a guest, you are only able to toggle Settings (see *Settings*) by clicking on the User dropdown in the top right corner of the menu, and view the About and Credential Pages via the footer.

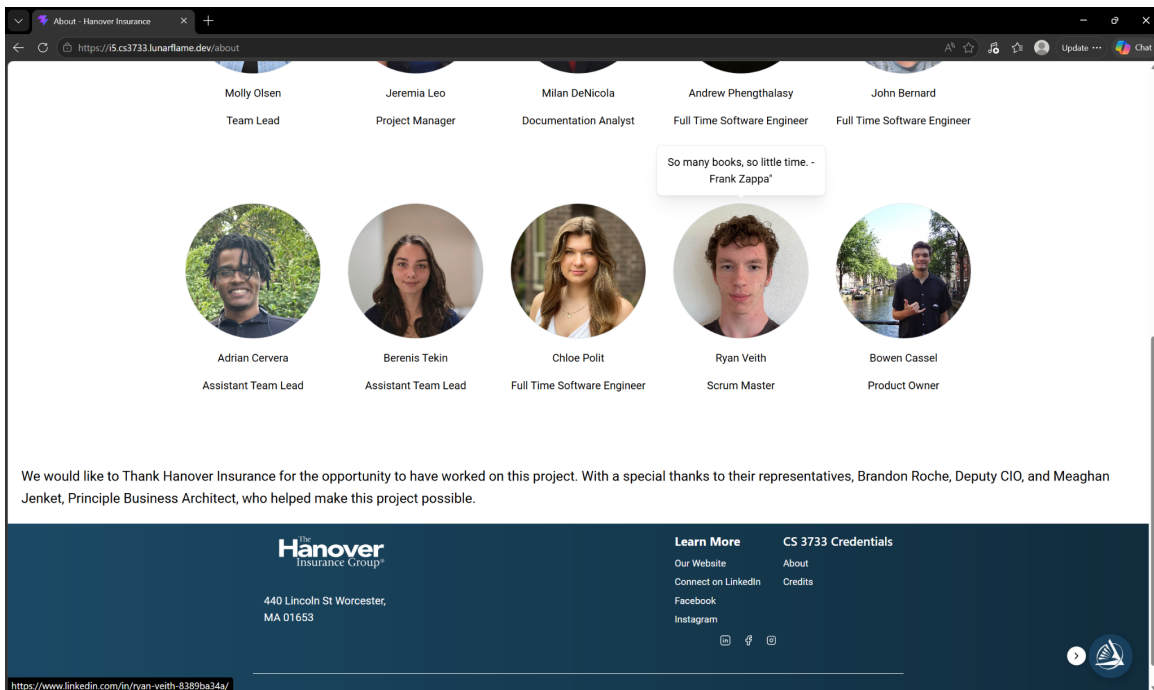
Additionally, you can visit Hanover’s socials also linked in the footer at any time. Clicking on the Hanover logo in the top left corner redirects you back to this page until you have logged in.

# About

One of the few pages you can access when both logged in and logged out, the About page features the profiles of Team Forest Fairies. You can always navigate it by scrolling down to the Footer and clicking the “About” link.

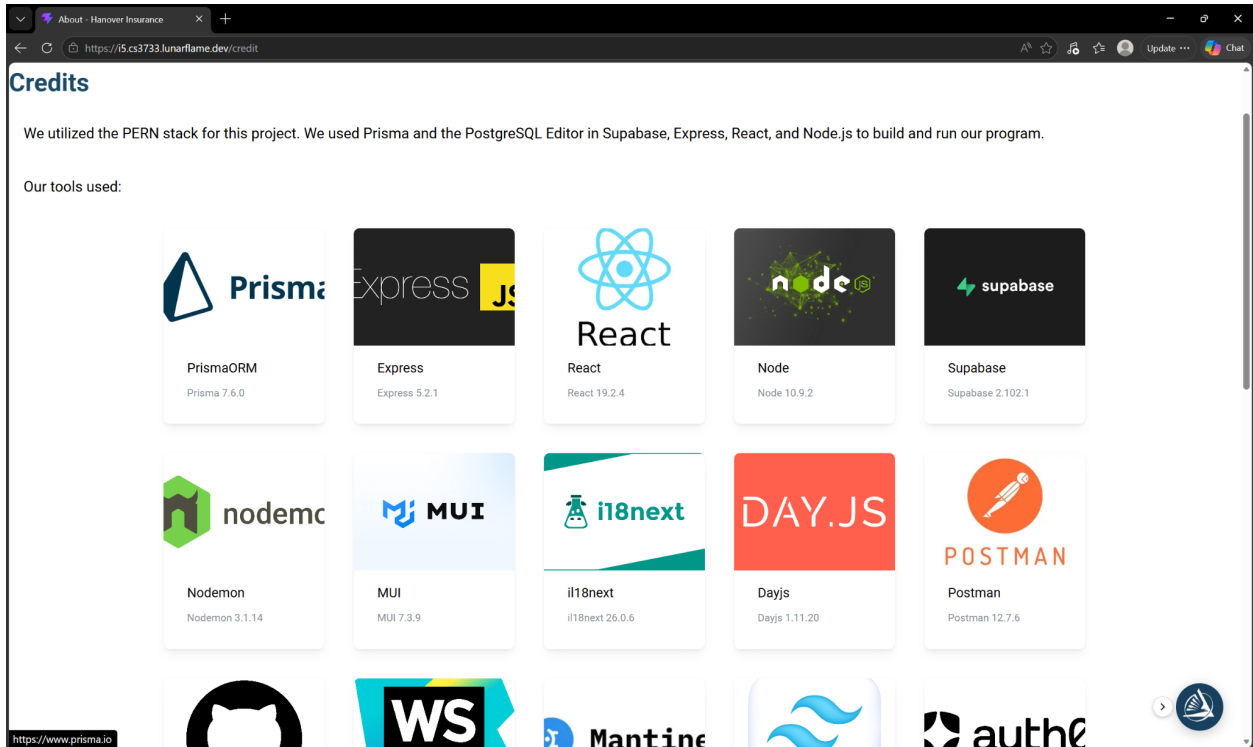


Hovering over the image of the various team members displays their favorite quote as a pop-up (Figure 2), and clicking on the image will redirect you to their affiliated LinkedIn/GitHub Profile. You can navigate back to the home page by clicking the Hanover logo in the top left corner.



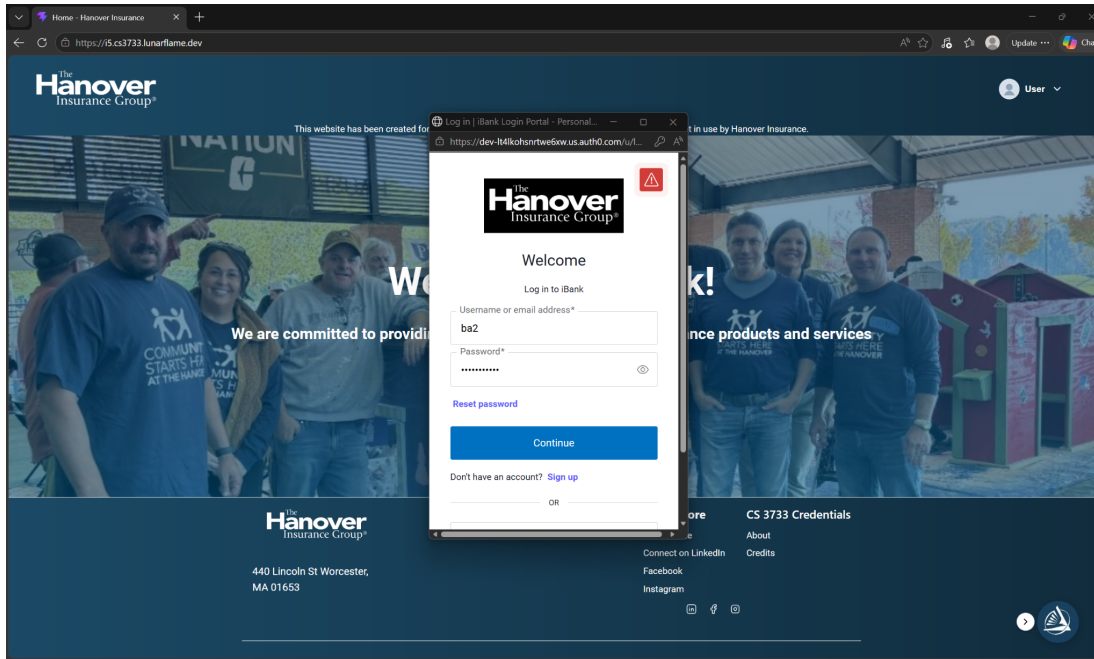
# Credits

One of the few pages you can access when both logged in and logged out, the Credits page features the various software tools and libraries utilized by Team Forest Fairies in the creation of this application. You can always navigate it by scrolling down to the Footer and clicking the “Credits” link. Clicking on the various listed tools redirects you to the website for downloading or using the tool. You can navigate back to the home page by clicking the Hanover logo in the top left corner.

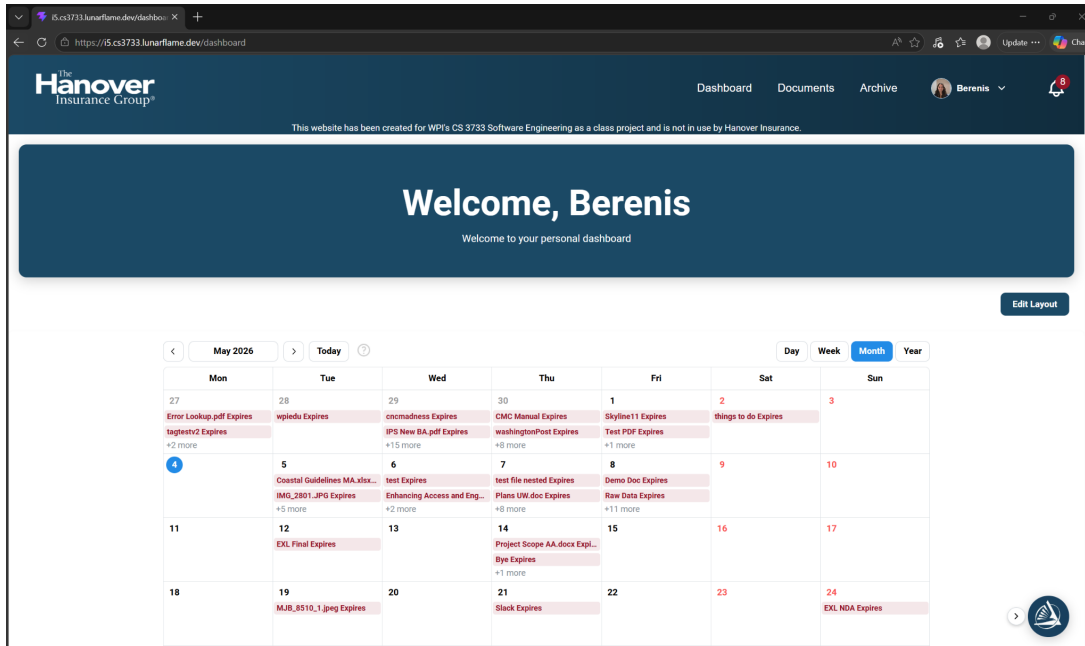


# Logging In

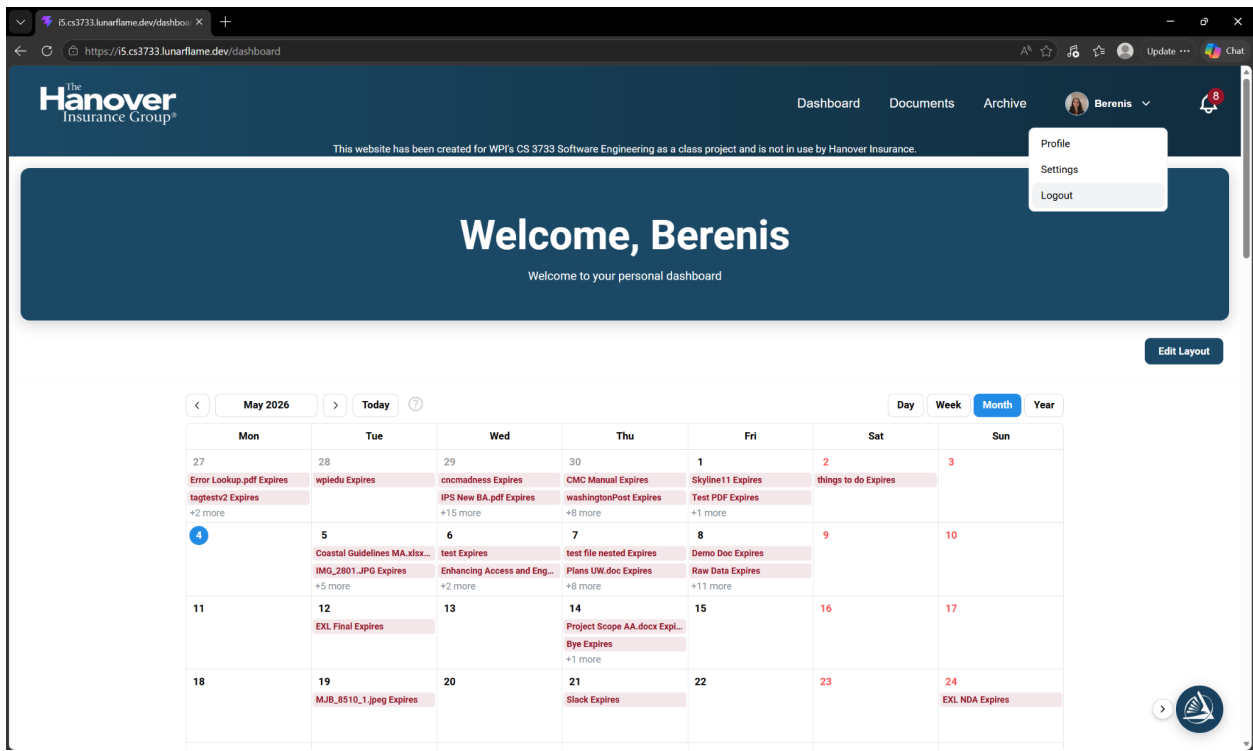
When ready to log in, click on the “Get Started” Button centered on the Home Page. An auth0 pop-up will appear and ask you to verify your username and password. For the purposes of this manual, we will be logged under the account “admin”, “under3”, and “ba2” to display all the functionality of this application.



After logging in, you will be redirected to the statistics page and are now able to access all the features of iBank for your role. Your profile photo and first name will populate the profile icon in the top right.



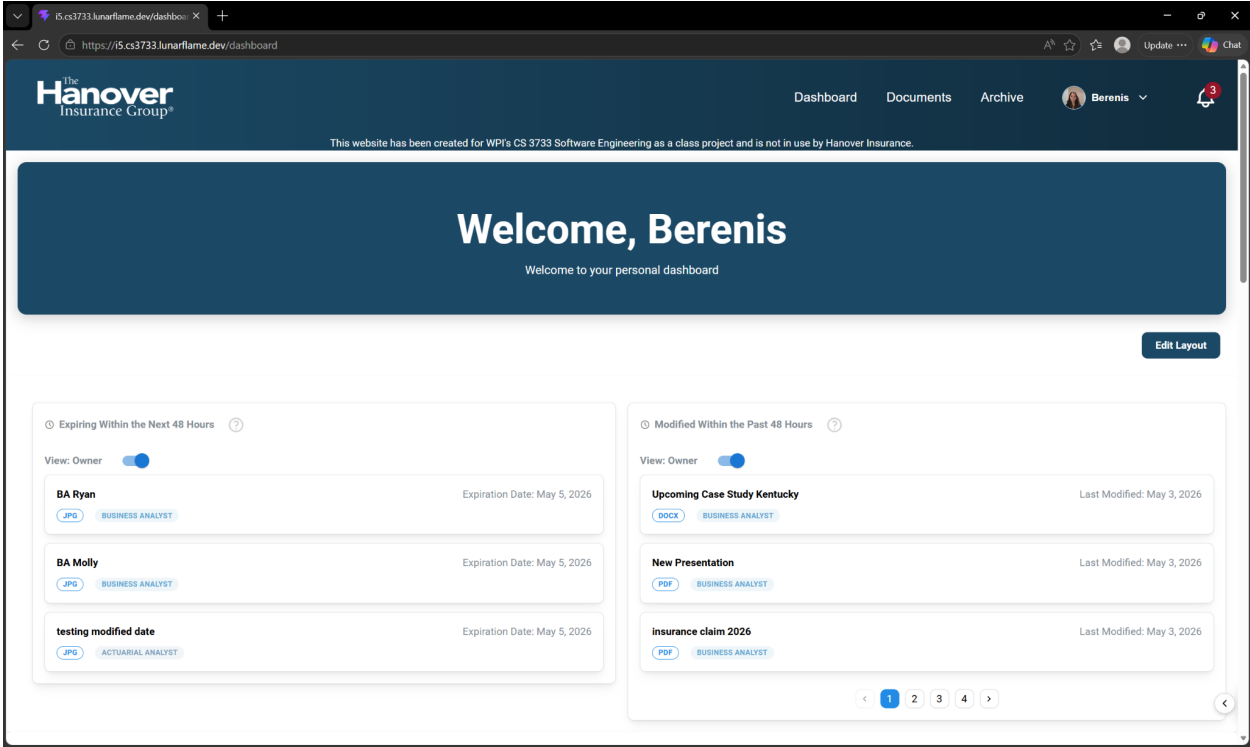
To log out, click on the profile icon and click on the “Logout” button.



We will now review the major features of iBank.

# Statistics Dashboard

Upon landing on the website, all employees are first greeted by the Statistics Dashboard. The dashboard contains a variety of widgets, which contain different information and stats about both users and documents. These widgets can be customized for the user as a saved set for them to use. When new accounts are created, they are assigned a default widget set-up based upon what their role requires.

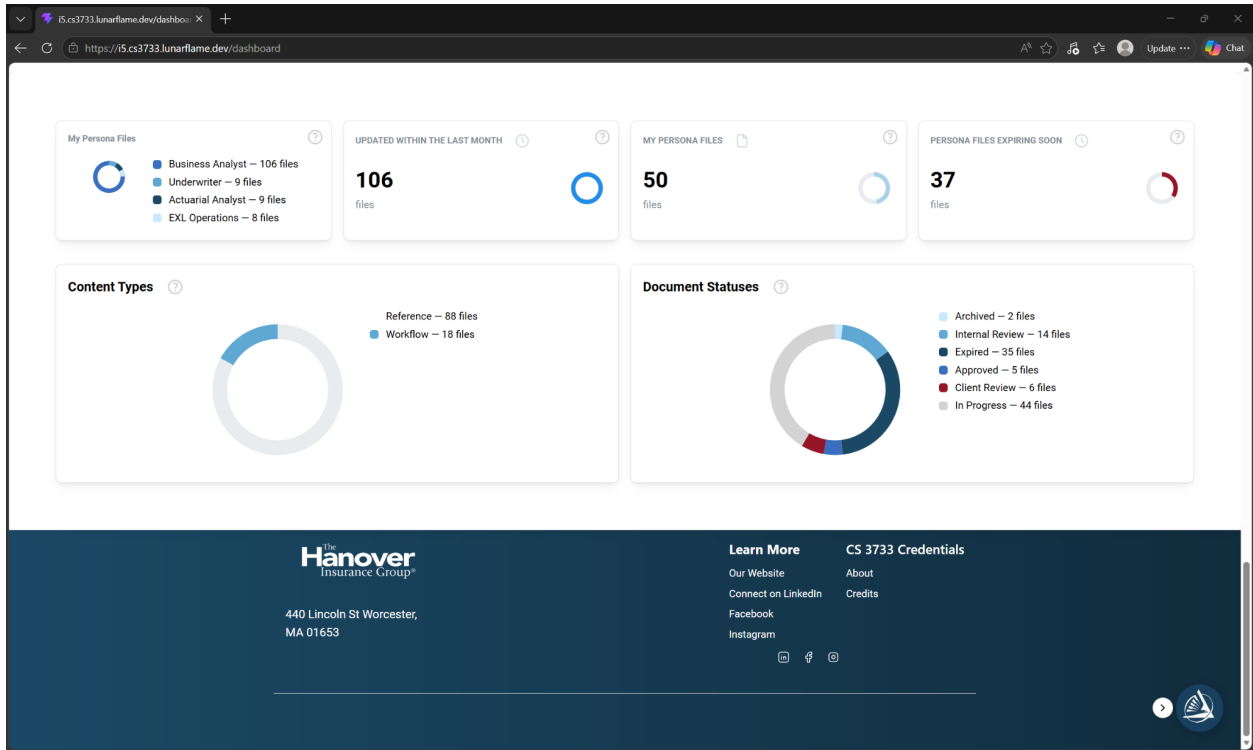


Below are the various possible widgets on the dashboard.

# Widget Types

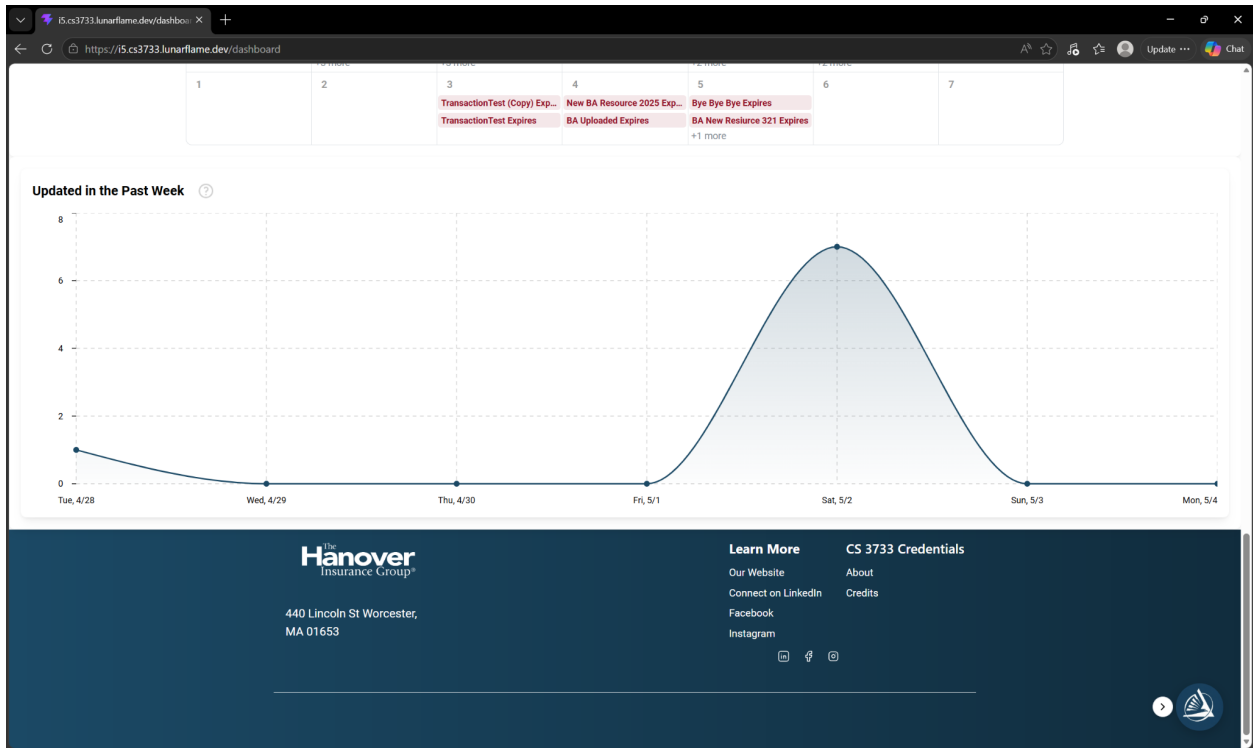
## Stats Grid

The stats grid showcases all of the current employees' persona files, as well as document statuses and document updates, all displayed as rings.



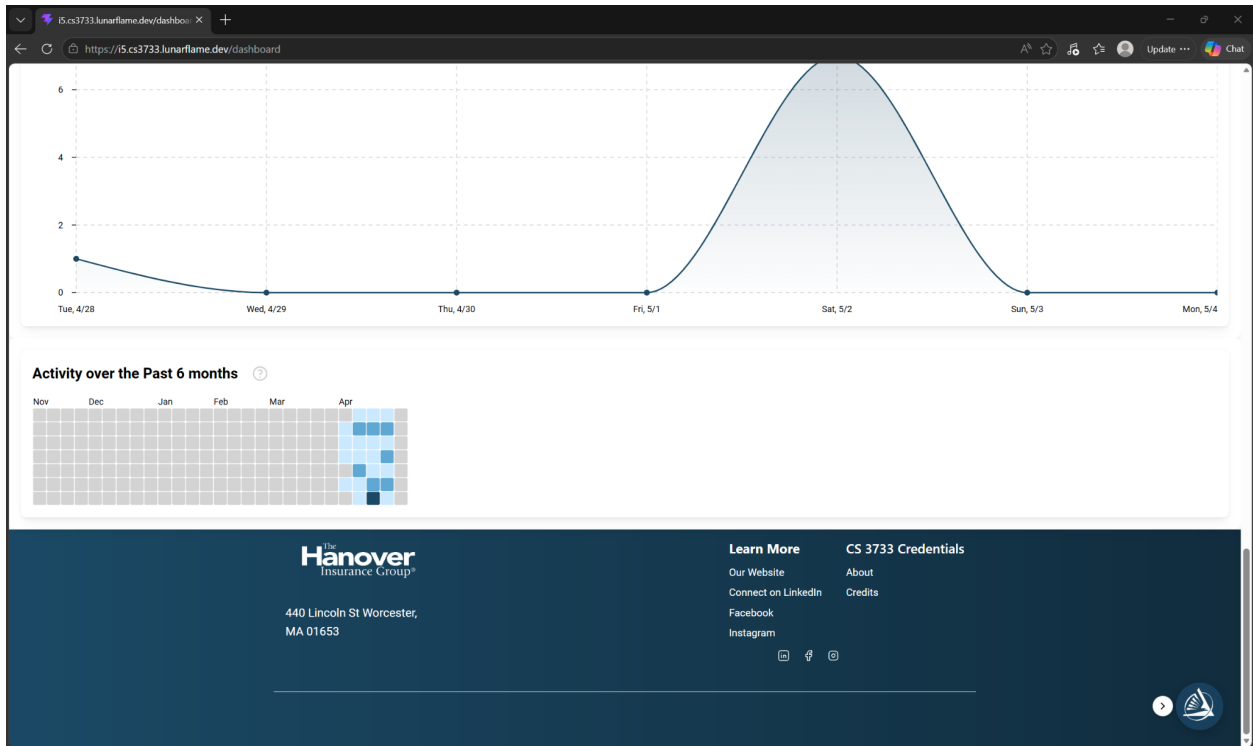
# Area Chart

Shows the number of documents updated in the last week in a graph format.



# Heat Map

The heat map shows the activity in the last 6 months.



# Calendar

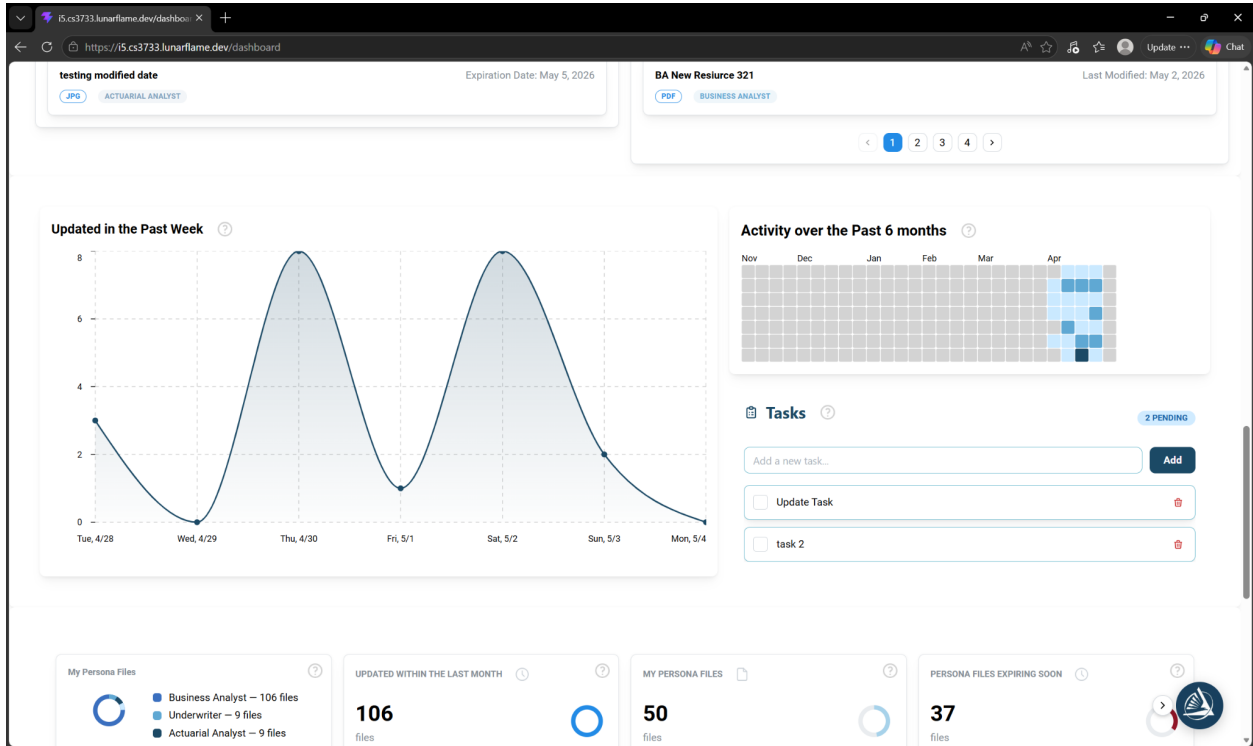
The calendar puts in documents when their expiration docs. This allows for a visual representation of expiring documents.

The screenshot displays a web browser window with a calendar interface. The browser address bar shows the URL `https://i5.cs3733.lunarflame.dev/dashboard`. The calendar is set to May 2026, with navigation buttons for 'May 2026', 'Today', 'Day', 'Week', 'Month', and 'Year'. An 'Edit Layout' button is located in the top right corner. The calendar grid shows document expiration dates for each day of the month. At the bottom, there are two summary boxes: 'Updated in the Past Week' and 'Activity over the Past 6 months', both with question mark icons. A circular icon with a magnifying glass is also present in the bottom right corner.

Mon	Tue	Wed	Thu	Fri	Sat	Sun
27 Error Lookup.pdf Expires tagtestv2 Expires +2 more	28 wpledu Expires	29 cncmadness Expires IPS New BA.pdf Expires +15 more	30 CMC Manual Expires washingtonPost Expires +8 more	1 Skyline11 Expires Test PDF Expires +1 more	2 things to do Expires	3
4	5 Coastal Guidelines MA.xlsx... IM0_2801.JPG Expires +5 more	6 test Expires Enhancing Access and Eng... +2 more	7 test file nested Expires Plans UW.doc Expires +8 more	8 Demo Doc Expires Raw Data Expires +11 more	9	10
11	12 EXL Final Expires	13	14 Project Scope AA.docx Exp... Bye Expires +1 more	15	16	17
18	19 MJB_8510_1.jpeg Expires	20	21 Slack Expires	22	23	24 EXL NDA Expires
25 LOGO! Expires Experience Plans Underwrit...	26 EXL Op Roster Expires New EXL Form Expires +3 more	27 Loss Eligibility Expires Schedule Rating Plans.doc ... +3 more	28	29 Experience Plans Underwrit... bulk_Test13.JPG Expires +2 more	30 2026 Student Project Agree... BusinessAnalystFile Expires +2 more	31
1	2	3 TransactionTest (Copy) Exp... TransactionTest Expires	4 New BA Resource 2025 Exp... BA Uploaded Expires	5 Bye Bye Bye Expires BA New Resurce 321 Expires +1 more	6	7

## Charts

Charts display data about document activity and acts as a good combined reference for the heatmap and area chart, showing activity in general over the past week and over the last six months. Additionally, it has a Tasks bar where employees can create, cross off, or delete personal tasks they have to do.



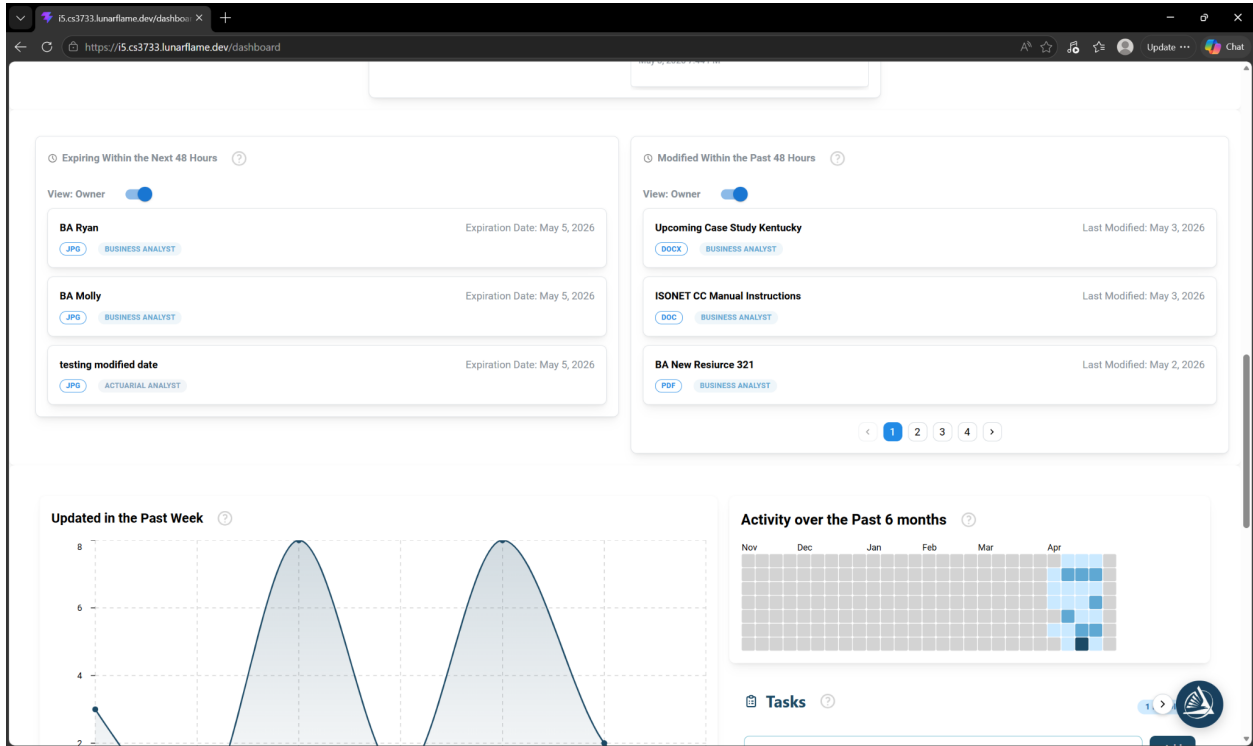
## Transactions

This allows employees to see how many files they had edited, deleted, or added today and also which ones.

The screenshot shows a web browser window with the URL `https://i5.cs3733.lunarfame.dev/dashboard`. The dashboard features a calendar at the top with a heatmap for the month of April. Below the calendar is a section titled "My Activity Today" which provides a summary of file actions: 7 files added, 1 file edited, and 0 files deleted. To the right of this summary is a "Document Activity (Today)" list containing three items: "Personalized Profile Tutorial", "Notifications Tutorial", and "Finding Documents Tutorial", all dated May 3, 2026 at 4:02 PM. Each item has an "ADDED" button. The footer of the page includes the Hanover Insurance Group logo and address (440 Lincoln St Worcester, MA 01653), along with links for "Learn More" (Our Website, Connect on LinkedIn, Facebook, Instagram) and "CS 3733 Credentials" (About, Credits). Social media icons for LinkedIn, Facebook, and Instagram are also present.

## Document Status

Document status shows a list of documents set to expire within the next 48 hours and documents that were modified within the last 48 hours. Toggling the owner changes whether you see the stats for yourself or for your persona, allowing to compare both personal and overall workloads. Admins by default see all expiring and modified documents here.



## Transaction Widgets Extended (Admin Only)

One additional upgrade for the widgets involves the Admin variant of the Transaction widget. Switching to “Admin View” allows an admin to see the full transaction history of any employee over the past week, including adding, editing, deleting, checking in, and checking out documents. In addition, their regular transaction widget opts to show the total number of add, edited, and deleted documents for the day along with a list of all the add/edit/deleted documents, overall allowing them to both observe individual employee histories and day-to-day productivity levels.

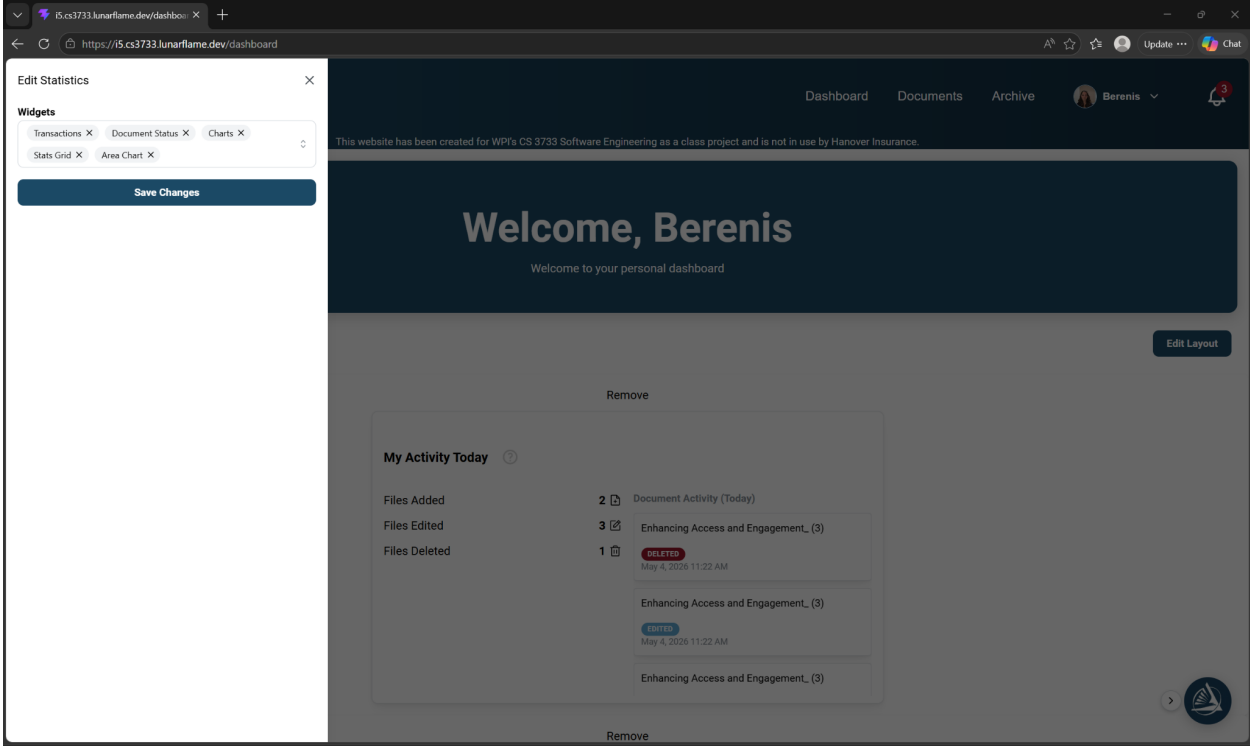
The screenshot displays a web application interface for monitoring employee activity. The main section is titled "Employee Activity Today" and includes an "Admin View" toggle switch. Below this, a "Select Employee" dropdown menu is set to "Berenis Tekin". The interface is divided into two columns: "Check In / Out History (Past Week)" and "Document Activity (Past Week)".

Check In / Out History (Past Week)	Document Activity (Past Week)
Enhancing Access and Engagement_ (3) May 4, 2026 11:22 AM <b>IN</b>	Enhancing Access and Engagement_ (3) May 4, 2026 11:22 AM <b>DELETED</b>
Enhancing Access and Engagement_ (3) May 4, 2026 11:21 AM <b>OUT</b>	Enhancing Access and Engagement_ (3) May 4, 2026 11:22 AM <b>EDITED</b>
Enhancing Access and Engagement_ (3) May 4, 2026 11:21 AM <b>OUT</b>	Enhancing Access and Engagement_ (3) May 4, 2026 11:22 AM <b>EDITED</b>
P1140443 May 4, 2026 10:06 AM <b>IN</b>	New Presentation May 4, 2026 11:21 AM <b>ADDED</b>
P1140443 May 4, 2026 10:06 AM <b>OUT</b>	New BA Resource 2025 May 4, 2026 12:28 AM <b>EDITED</b>

At the bottom of the interface, there is a section titled "Updated in the Past Week" with a count of 4 and a navigation arrow. A circular logo is visible in the bottom right corner.

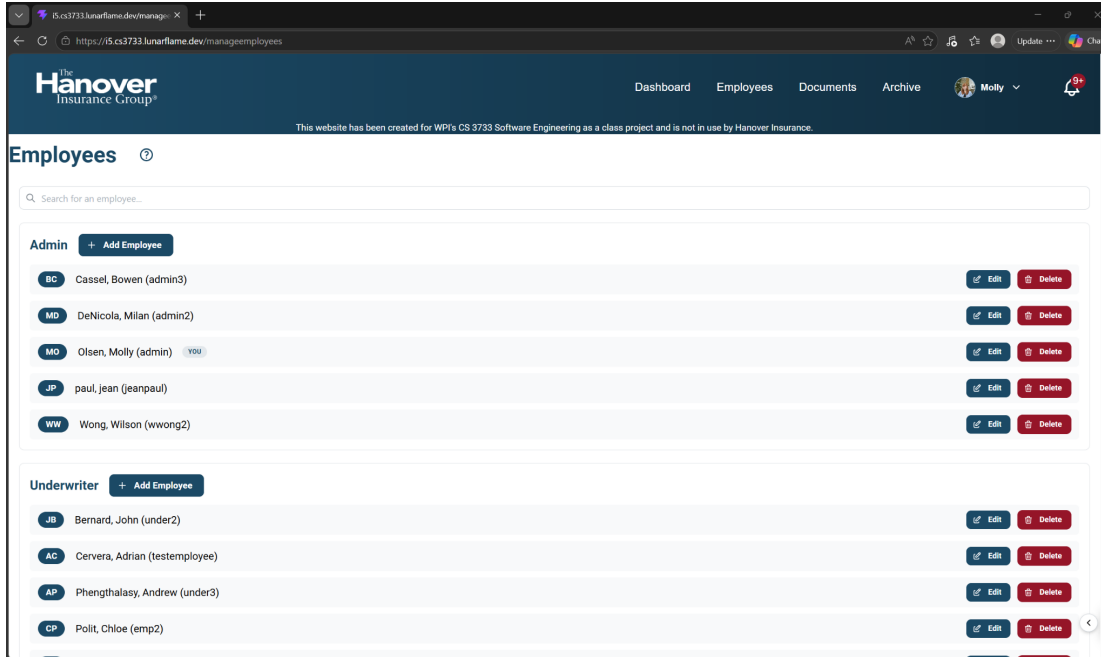
# Editing and Deleting Widgets for Personalization

To change the dashboard for the user, click the “Edit Layout” button to open up a sidebar. In that sidebar, the user can select any number of widgets to add from the list or delete current widgets displayed. Upon making their edits, they hit “Save Changes” to save this layout, which closes the sidebar and changes the layout of the widgets for the user. This layout is now the default layout for that user.

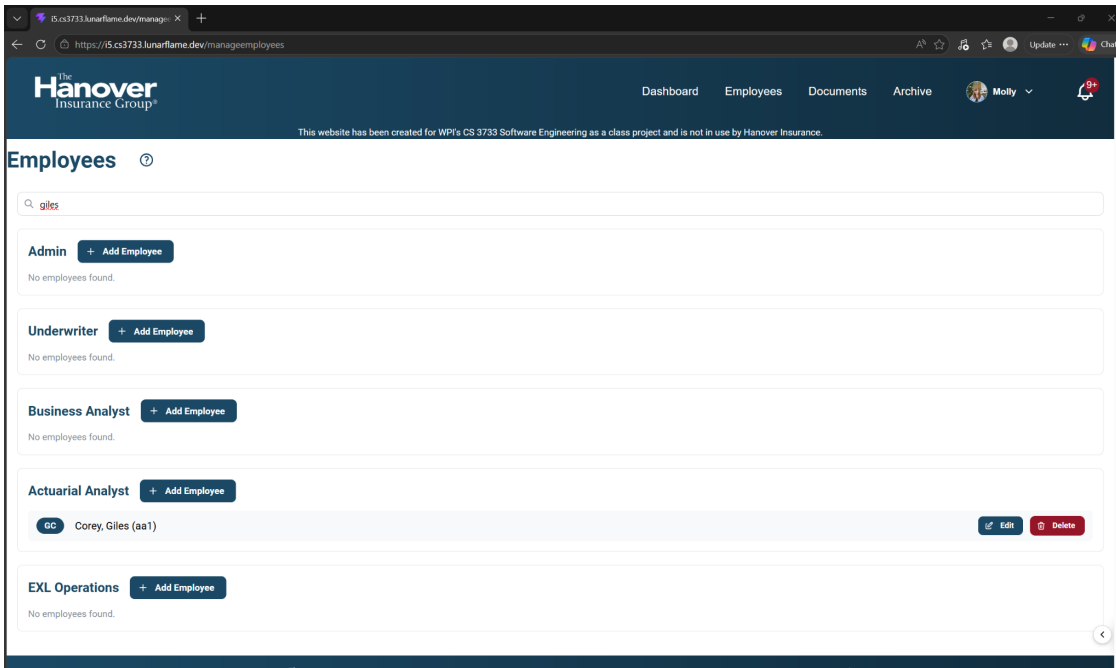


## Employees (Admin Only)

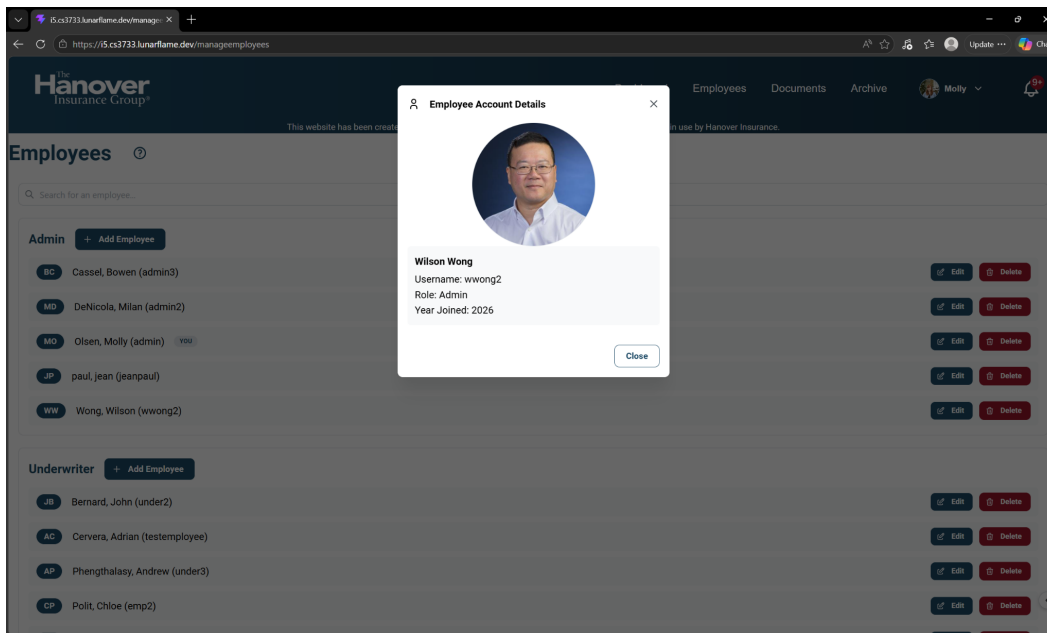
This page is used for managing employees from an admin perspective. Clicking on the “Employees” tab in the menu redirects you to this page. From here, you can view the full list of employees on iBank sorted by role.



To find a specific employee, you can filter the list by first name, last name, persona, or username in the search bar.

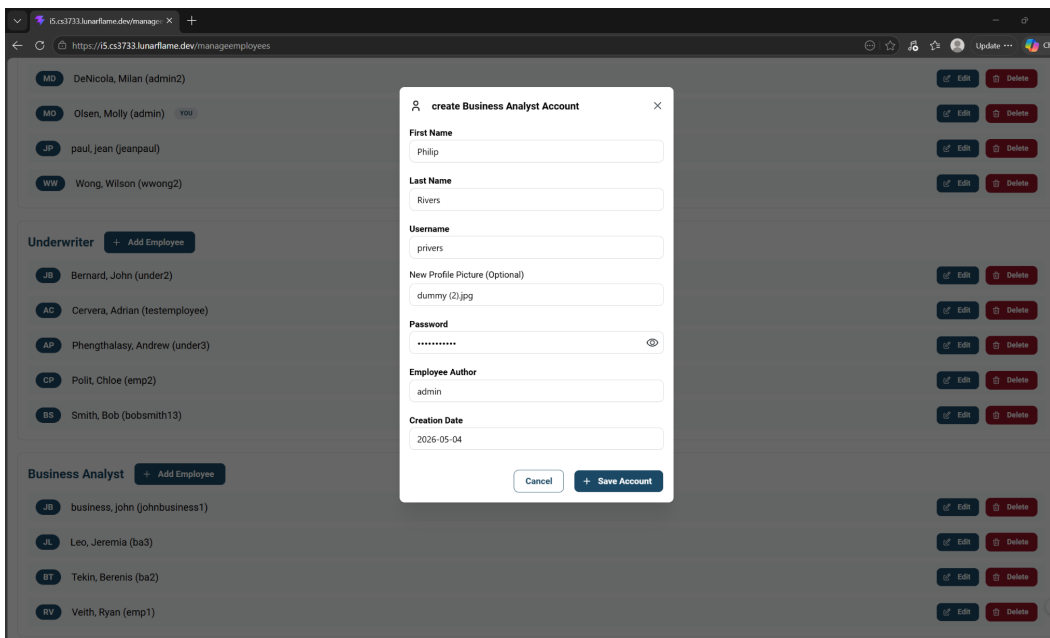


Clicking on an employee's initials will display a miniature profile blurb with their name, username, role, join date, and optional profile picture as a pop-up. Clicking anywhere else on the page closes the pop-up.



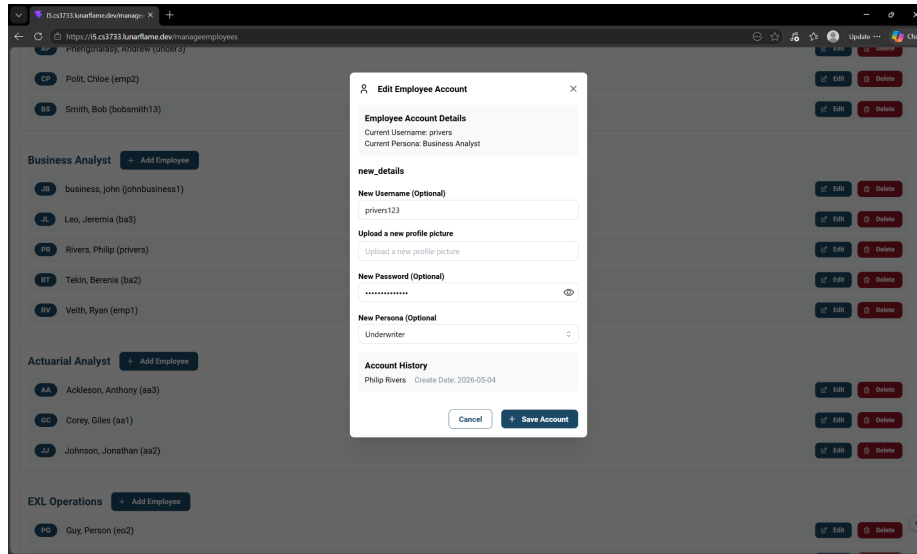
## Add Employee

To add a new employee, click the "Add Employee" button next to the role you want to create a new employee for. A pop-up will appear and prompt you for their first name, last name, username, password, and an optional profile picture. After filling out all the fields, click "Save Account" to create the new employee account. Automatically, a new employee will be generated in auth0 and will now have access to iBank.



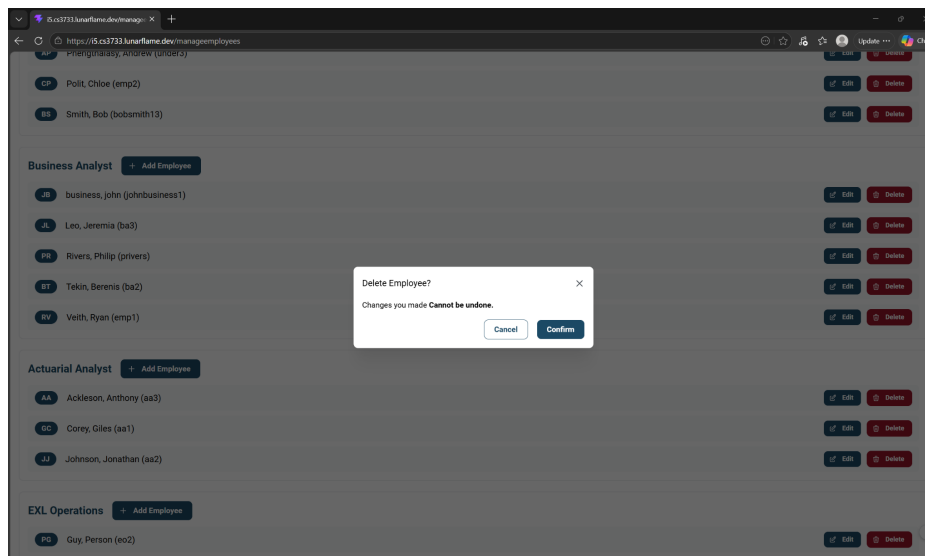
## Update Employee

To update an employee's information, click the "Edit" button next to the employee you want to edit. In the pop-up, you have the ability to change their username, password, profile picture, or persona, though in order for the edit to go through you must make at least one change. After making your edits, click the "Save Account" button to update their information. The pop-up automatically closes and any changes are automatically generated.



## Deleting Employee

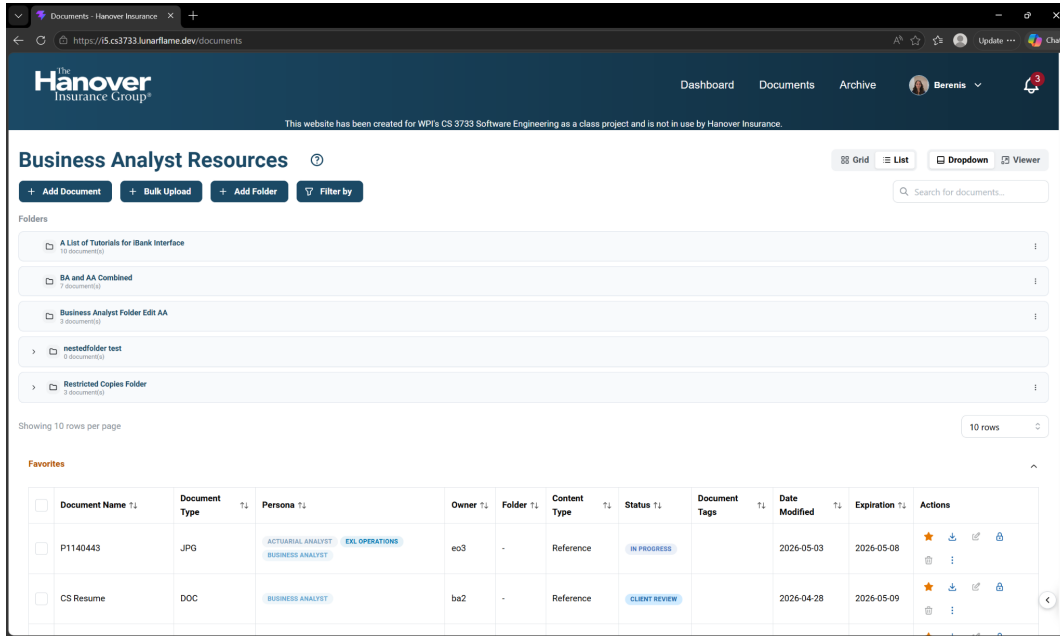
To delete an employee, click the "Delete" button next to the employee you want to delete. A pop-up will appear asking you to confirm the deletion. Note that deletion of employees is final and CANNOT be reversed. Clicking "Cancel" exits the pop-up, while hitting "Confirm" will remove the employee from the system. Any documents associated with that employee will remain under their name, though this does not prevent an admin from changing their ownership status.



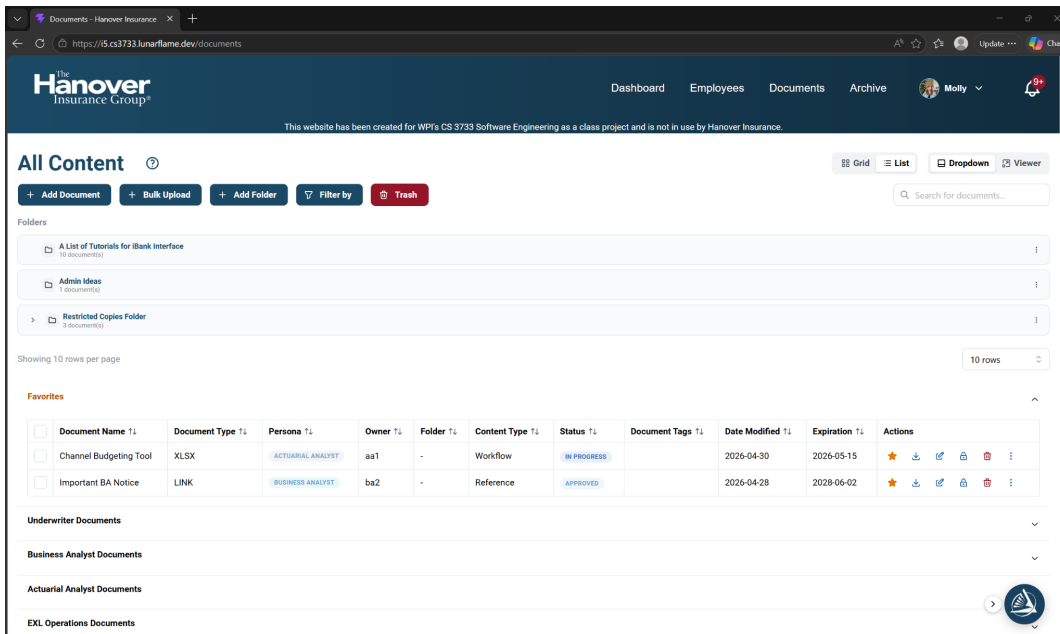
# Documents

The Documents page makes up the bulk of the content management system, it is where content can be added, accessed, edited, and deleted. This page differs based on the persona of the employee, with non-Admin seeing their set of documents biased towards the top and Admin seeing all the documents as they are. There are also additional actions Admin can take on the page that will be noted in the following sections.

## Business Analyst View:



## Admin View:



# Layout Options

## List View

All documents and their descriptive attributes are available in a list with adjustable rows and different pages.

Underwriter Documents

<input type="checkbox"/>	Document Name	Document Type	Persona	Owner	Folder	Content Type	Status	Document Tags	Date Modified	Expiration	Actions
<input type="checkbox"/>	EXL Elite Document	JPG	EXL OPERATIONS UNDERWRITER	eo1	-	Workflow	IN PROGRESS		2026-04-29	2026-08-27	🔖 ⋮
<input type="checkbox"/>	Additional Material	DOCX	UNDERWRITER	under2	-	Reference	APPROVED	CLAIM	2026-05-02	2026-08-21	⭐ ⬇️ 🗑️ ⋮
<input type="checkbox"/>	airestf	LINK	UNDERWRITER	under2	-	Workflow	IN PROGRESS		2026-04-22	2027-04-22	🔖 ⋮
<input type="checkbox"/>	avrilavigne	MP3	UNDERWRITER	ba2	-	Reference	INTERNAL REV...		2026-04-28	2026-05-30	⭐ ⬇️ 🗑️ ⋮
<input type="checkbox"/>	Book Image1	JPG	UNDERWRITER	under2	-	Workflow	APPROVED		2026-05-04	2027-02-25	⭐ ⬇️ 🗑️ ⋮
<input type="checkbox"/>	CASCADE	MP3	UNDERWRITER	under3	-	Workflow	IN PROGRESS		2026-04-23	2027-04-23	⭐ ⬇️ 🗑️ ⋮
<input type="checkbox"/>	Coastal Guidelines CA.doc	DOC	UNDERWRITER	under3	-	Reference	INTERNAL REV...		2026-04-12	2026-08-20	⭐ ⬇️ 🗑️ ⋮
<input type="checkbox"/>	Coastal Guidelines MA.xlsx	XLSX	UNDERWRITER	under3	-	Workflow	CLIENT REVIEW		2026-04-12	2026-05-06	⭐ ⬇️ 🗑️ ⋮
<input type="checkbox"/>	Daily Report.pdf	PDF	UNDERWRITER	emp2	-	Workflow	INTERNAL REV...		2026-04-15	2026-08-20	⭐ ⬇️ 🗑️ ⋮
<input type="checkbox"/>	Daily Report1.pdf	PDF	UNDERWRITER	emp2	-	Workflow	INTERNAL REV...		2026-04-15	2026-08-20	⭐ ⬇️ 🗑️ ⋮


Page 1 of 4

< 1 2 3 4 >


## Grid View

Documents appear in larger grid previews with the same descriptive attributes.

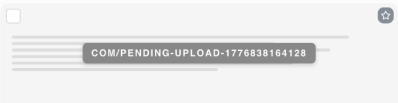
All Documents  Select all




**EXL Elite Document**  
eo1  
EXL OPERATIONS UNDERWRITER IN PROGRESS (JPG)




**Additional Material**  
under2  
UNDERWRITER APPROVED (DOCX) CLAIM



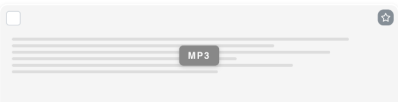
**airestf**  
under2  
UNDERWRITER IN PROGRESS (LINK)



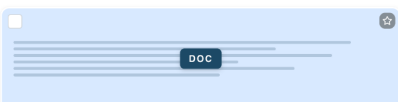
**avrilavigne**  
ba2  
UNDERWRITER INTERNAL REVIEW (MP3)




**Book Image1**  
under2  
UNDERWRITER APPROVED (JPG)



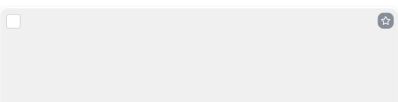
**CASCADE**  
under3  
UNDERWRITER IN PROGRESS (MP3)



**Coastal Guidelines CA.doc**  
under3  
UNDERWRITER INTERNAL REVIEW (DOC)



**Coastal Guidelines MA.xlsx**  
under3  
UNDERWRITER CLIENT REVIEW (XLSX)



**Daily Report.pdf**  
emp2  
UNDERWRITER INTERNAL REVIEW (PDF)

## Collapsible Page Scroll

All documents can be found under their respective persona assignments, and each list of documents can be collapsed to clear screen clutter and organize the page more.

UNDERWRITER UNDERWRITER

Folders

- A List of Tutorials for iBank Interface (0 document(s))
- nestedfolder test (0 document(s))
- Restricted Copies Folder (3 document(s))
- underwriter (0 document(s))

Showing 10 rows per page

10 rows

- Underwriter Documents
- Business Analyst Documents
- Actuarial Analyst Documents
- EXL Operations Documents

**The Hanover**  
Insurance Group®

440 Lincoln St Worcester,  
MA 01653

**Learn More**  
Our Website  
Connect on LinkedIn  
Facebook  
Instagram

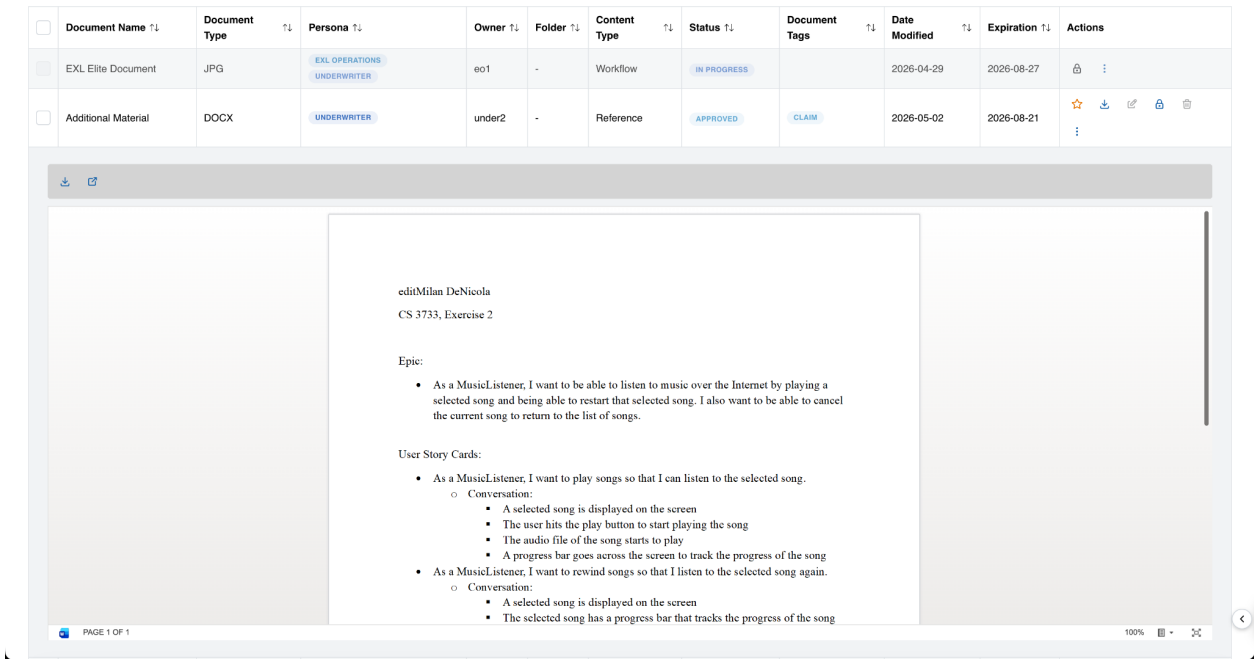
**CS 3733 Credentials**  
About  
Credits

⏪

# Document View Options

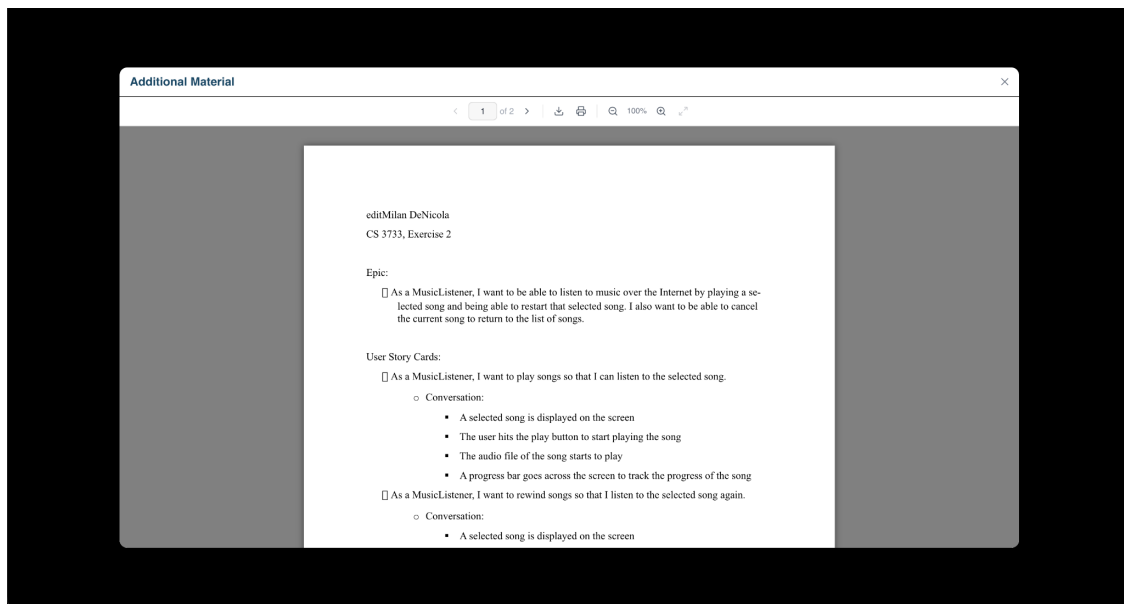
## Inline View

Employees have the ability to view documents within the page, with zoom in/ out, expand, download, and open in separate tab capabilities



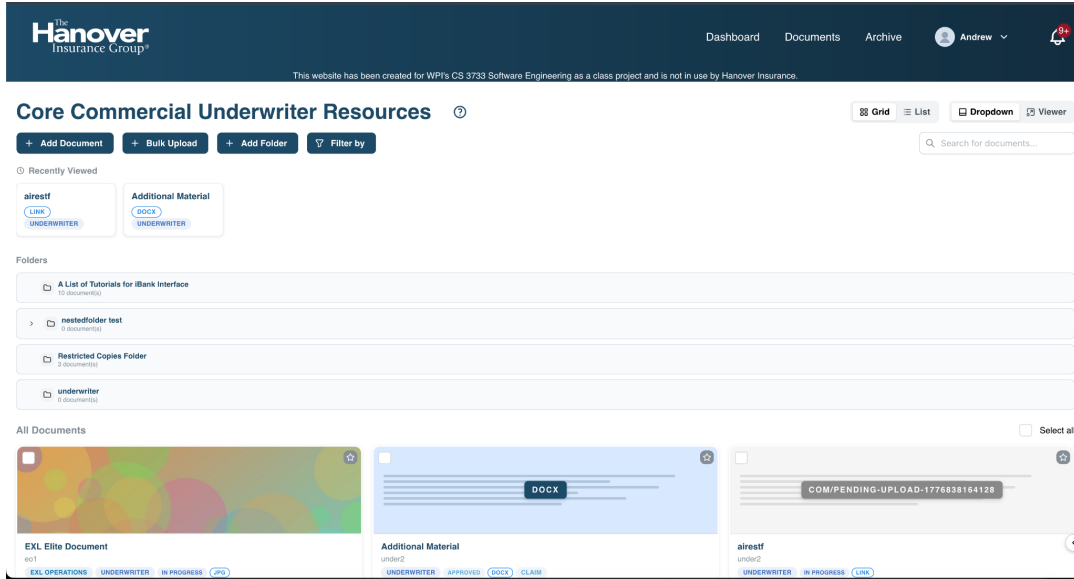
## Pop-Up View

Same capabilities as inline viewing but popup for more focus.



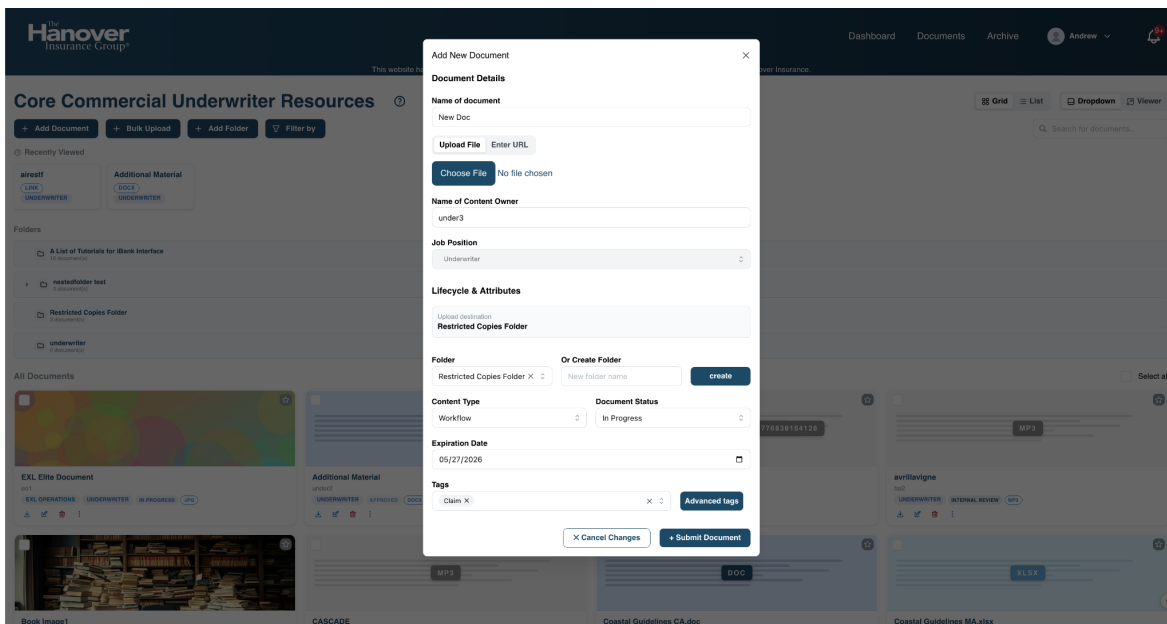
## Recently Viewed

Every time an employee logs in, each document they preview will be added to the recently viewed section of the documents page for ease of access. Clicking the recent documents brings the employee to their choice of document preview. This resets on a new login.



## Adding Documents

By clicking the "Add Document" button in the top left corner, employees are able to add new documents, and are able to customize the documents attributes to their liking. They can either choose a file from their device or upload a URL. The employees name and persona are locked, but they are able to choose which folder, content type, document status, expiration date, and tags to apply to the new document. It will then appear in their designated location. Admin can create documents for any employee.



## Bulk Upload

Using a “Bulk Add “ button in the top left corner, employees are able to select multiple files from their device and upload them into the document systems. Additionally, employees can create multiple files and customize their attributes within the given structures. For ease of access, attributes can be copied from the top file and given to the rest of the files via the “Autofill from First” button, and URLs can be added into the bulk add along with file uploads.

The screenshot displays the 'Bulk Upload' modal window in the 'The Hanover Insurance Group' system. The modal is titled 'Bulk Upload' and has a close button (X) in the top right corner. Below the title, there are three buttons: '+ Add Files', '+ Add URL', and 'Autofill from First'. The 'Upload destination' is set to 'Root'. A note states: 'All staged files will upload to the current folder.' Below this is a table with the following columns: File Name / URL, Owner, Persona, Content Type, Status, Tags, and Dates. The table contains four rows of files, each with a 'Submit' button. At the bottom of the modal, there are two buttons: 'X Cancel' and '+ Submit 4 files'.

File Name / URL	Owner	Persona	Content Type	Status	Tags	Dates	
hello john.org	under3	Underwriter	Referenc	Internal f	Demo X	Expires 05/13/2026	Submit
hello 2 bowen.org	under3	Underwriter	Referenc	Internal f	Demo X	Expires 05/13/2026	Submit
hello 3 andrew.org	under3	Underwriter	Referenc	Internal f	Demo X	Expires 05/13/2026	Submit
hello 4 molly.org	under3	Underwriter	Referenc	Internal f	Demo X	Expires 05/13/2026	Submit

# Document Actions

Employees are only able to perform actions on documents they have checked out and are under their persona. While viewable, other persona documents are uneditable. Admin has the ability to force check in documents and access all persona documents.

## Favorite

Employees are able to favorite documents with the star icon in the actions section, which will then appear in the favorites section above the persona related documents, allowing employees to access these documents quicker. Favorited documents are indicated by being in the favorites section, but the star icon will also be filled in.

A List of Tutorials for iBank Interface  
10 document(s)

nestedfolder test  
0 document(s)

Restricted Copies Folder  
3 document(s)

underwriter  
0 document(s)

Showing 10 rows per page 10 rows

**Favorites**

<input type="checkbox"/>	Document Name	Document Type	Persona	Owner	Folder	Content Type	Status	Document Tags	Date Modified	Expiration	Actions
<input type="checkbox"/>	Additional Material	DOCX	UNDERWRITER	under2	-	Reference	APPROVED	CLAIM	2026-05-02	2026-08-21	★
<input type="checkbox"/>	avrilavigne	MP3	UNDERWRITER	ba2	-	Reference	INTERNAL REVIEW		2026-04-28	2026-05-30	★
<input type="checkbox"/>	CASCADE	MP3	UNDERWRITER	under3	-	Workflow	IN PROGRESS		2026-04-23	2027-04-23	★

**Underwriter Documents**

<input type="checkbox"/>	Document Name	Document Type	Persona	Owner	Folder	Content Type	Status	Document Tags	Date Modified	Expiration	Actions
<input type="checkbox"/>	EXL Elite Document	JPG	EXL OPERATIONS UNDERWRITER	oo1	-	Workflow	IN PROGRESS		2026-04-29	2026-08-27	
<input type="checkbox"/>	airestf	LINK	UNDERWRITER	under2	-	Workflow	IN PROGRESS		2026-04-22	2027-04-22	
<input type="checkbox"/>	Book Image1	JPG	UNDERWRITER	under2	-	Workflow	APPROVED		2026-05-04	2027-02-25	★
<input type="checkbox"/>	Coastal Guidelines CA.doc	DOC	UNDERWRITER	under3	-	Reference	INTERNAL REV...		2026-04-12	2026-08-20	★

## Download

The download arrow icon adjacent to the star icon gives employees the ability to download a chosen document to their device.

Document Name	Document Type	Persona	Owner	Folder	Content Type	Status	Document Tags	Date Modified	Expiration	Actions
Additional Material	DOCX	UNDERWRITER	under2	-	Reference	APPROVED	CLAIM	2026-05-02	2026-08-21	Star, Download, Share, Copy, Delete, More
avrilavigne	MP3	UNDERWRITER	ba2	-	Reference	INTERNAL REVIEW		2026-04-28	2026-05-30	Star, Download, Share, Copy, Delete, More
CASCADE	MP3	UNDERWRITER	under3	-	Workflow	IN PROGRESS		2026-04-23	2027-04-23	Star, Download, Share, Copy, Delete, More

Document Name	Document Type	Persona	Owner	Folder	Content Type	Status	Document Tags	Date Modified	Expiration	Actions
EXL Elite Document	JPG	EXL OPERATIONS UNDERWRITER	eo1	-	Workflow	IN PROGRESS		2026-04-29	2026-08-27	Share, More
airestf	LINK	UNDERWRITER	under2	-	Workflow	IN PROGRESS		2026-04-22	2027-04-22	Download, Share, More
Book Image1	JPG	UNDERWRITER	under2	-	Workflow	APPROVED		2026-05-04	2027-02-25	Star, Download, Share, Copy, Delete, More
Coastal Guidelines CA.doc	DOC	UNDERWRITER	under3	-	Reference	INTERNAL REVL...		2026-04-12	2026-08-20	Star, Download, Share, Copy, Delete, More
Coastal Guidelines MA.xlsx	XLSX	UNDERWRITER	under3	-	Workflow	CLIENT REVIEW		2026-04-12	2026-05-06	Star, Download, Share, Copy, Delete, More
Daily Report.pdf	PDF	UNDERWRITER	emp2	-	Workflow	INTERNAL REVL...		2026-04-15	2026-08-20	Star, Download, Share, Copy, Delete, More
Daily Report1.pdf	PDF	UNDERWRITER	emp2	-	Workflow	INTERNAL REVL...		2026-04-15	2026-08-20	Star, Download, Share, Copy, Delete, More
Demo Doc	DOCX	UNDERWRITER	under3	-	Workflow	INTERNAL REVL...		2026-04-10	2026-05-09	Star, Download, Share, Copy, Delete, More

## Edit

Once a document is checked out, employees are able to change available fields exactly like the create document fields. Once employees change what they want, they can discard changes or save the changes and the document will be placed back with the fixed fields.

**Edit Document Details**

**Document Details**

Name of document: Book Image1

Upload File | Enter URL

Choose File | No file chosen

Name of Content Owner: under2

Job Position: Underwriter

Folder: Top level

Tags: [Advanced tags]

**Lifecycle & Attributes**

Content Type: Workflow | Document Status: Approved

Expiration Date: 02/25/2027

[X] Cancel Changes | [✓] Save Changes

## Checkin/Checkout

In order to edit documents, employees will have to Checkout their desired documents with the lock symbol in the actions column. Available documents are presented by a locked icon. Documents checked out by the specific employee will be displayed by an open lock icon, indicating that it needs to be checked back in. Documents checked out by other employees will be greyed out and if the cursor hovers over the greyed out lock icon, information will be displayed about which employee has checked out that specific document.

Showing 10 rows per page 10 rows

**Underwriter Documents**

<input type="checkbox"/>	Document Name	Document Type	Persona	Owner	Folder	Content Type	Status	Document Tags	Date Modified	Expiration	Actions
<input type="checkbox"/>	EXL Elle Document	JPG	EXL OPERATIONS UNDERWRITER	eo1	-	Workflow	IN PROGRESS		2026-04-29	2026-08-27	<b>Checkout</b>
<input type="checkbox"/>	Additional Material	DOCX	UNDERWRITER	under2	-	Reference	APPROVED	CLAIM	2026-05-02	2026-08-21	
<input type="checkbox"/>	airestf	LINK	UNDERWRITER	under2	-	Workflow	IN PROGRESS		2026-04-22	2027-04-22	
<input type="checkbox"/>	avillavigne	MP3	UNDERWRITER	ba2	-	Reference	INTERNAL REV...		2026-04-28	2026-05-30	
<input type="checkbox"/>	Book Image1	JPG	UNDERWRITER	under2	-	Workflow	APPROVED		2026-05-04	2027-02-25	
<input type="checkbox"/>	CASCADE	MP3	UNDERWRITER	under3	-	Workflow	IN PROGRESS		2026-04-23	2027-04-23	
<input type="checkbox"/>	Coastal Guidelines CA.doc	DOC	UNDERWRITER	under3	-	Reference	INTERNAL REV...		2026-04-12	2026-08-20	
<input type="checkbox"/>	Coastal Guidelines MA.xlsx	XLSX	UNDERWRITER	under3	-	Workflow	CLIENT REVIEW		2026-04-12	2026-05-06	
<input type="checkbox"/>	Daily Report.pdf	PDF	UNDERWRITER	emp2	-	Workflow	INTERNAL REV...		2026-04-15	2026-08-20	
<input type="checkbox"/>	Dalv Reortt1.pdf	PDF	UNDERWRITER	emo2	-	Workflow	INTERNAL REV...		2026-04-15	2026-08-20	

## Forced Checkin (Admin Only)

Admins are able to force checkin documents checked out by other admins and employees, allowing admins to essentially edit any document they choose to.

Showing 10 rows per page 10 rows

**Favorites**

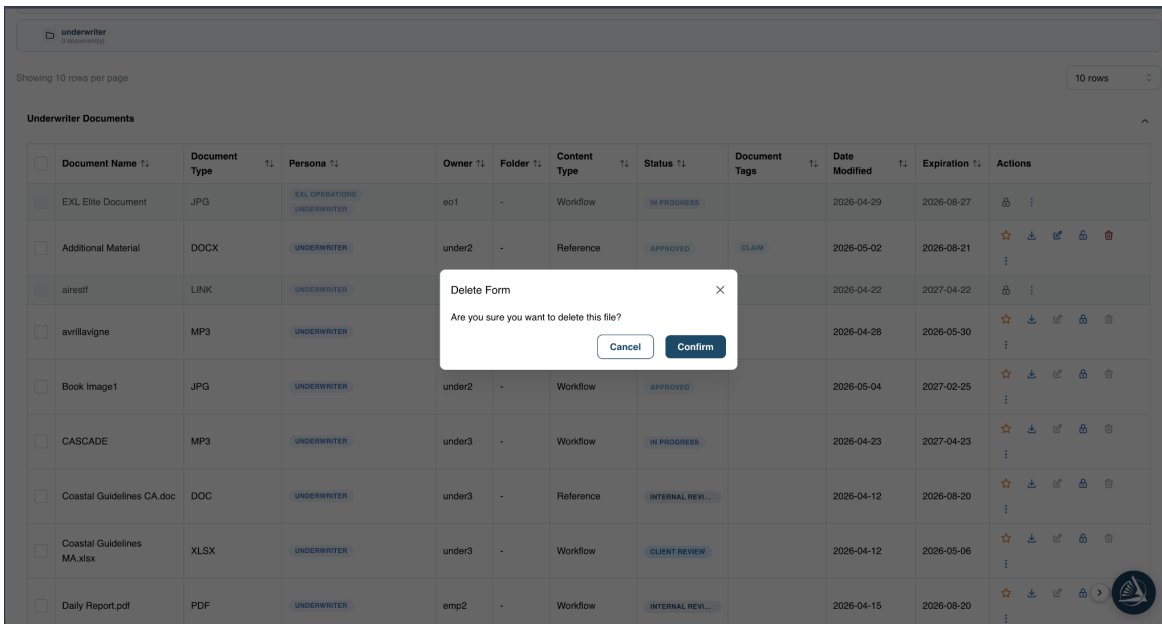
<input type="checkbox"/>	Document Name	Document Type	Persona	Owner	Folder	Content Type	Status	Document Tags	Date Modified	Expiration	Actions
<input type="checkbox"/>	Channel Budgeting Tool	XLSX	ACTUARIAL ANALYST	aa1	-	Workflow	IN PROGRESS	OTHER FINANCIAL	2026-04-30	2026-05-15	
<input type="checkbox"/>	Important BA Notice	LINK	BUSINESS ANALYST	ba2	-	Reference	APPROVED		2026-04-28	2026-06-02	

**Underwriter Documents**

<input type="checkbox"/>	Document Name	Document Type	Persona	Owner	Folder	Content Type	Status	Document Tags	Date Modified	Expiration	Actions
<input type="checkbox"/>	EXL Elle Document	JPG	EXL OPERATIONS UNDERWRITER	eo1	-	Workflow	IN PROGRESS		2026-04-29	2026-08-27	<b>Force check-in (Checked out by admin)</b>
<input type="checkbox"/>	Additional Material	DOCX	UNDERWRITER	under2	-	Reference	APPROVED	CLAIM	2026-05-02	2026-08-21	
<input type="checkbox"/>	airestf	LINK	UNDERWRITER	under2	-	Workflow	IN PROGRESS		2026-04-22	2027-04-22	
<input type="checkbox"/>	avillavigne	MP3	UNDERWRITER	ba2	-	Reference	INTERNAL REV...		2026-04-28	2026-05-30	
<input type="checkbox"/>	Book Image1	JPG	UNDERWRITER	under2	-	Workflow	APPROVED		2026-05-04	2027-02-25	
<input type="checkbox"/>	CASCADE	MP3	UNDERWRITER	under3	-	Workflow	IN PROGRESS		2026-04-23	2027-04-23	

## Delete

Employees also have the ability to soft delete documents using the red trash icon in the actions column. Once they click the trash icon, a confirmation message will pop up and the user can cancel or confirm document deletion. If confirmed, the document is moved to trash, which can only be accessed by admins.

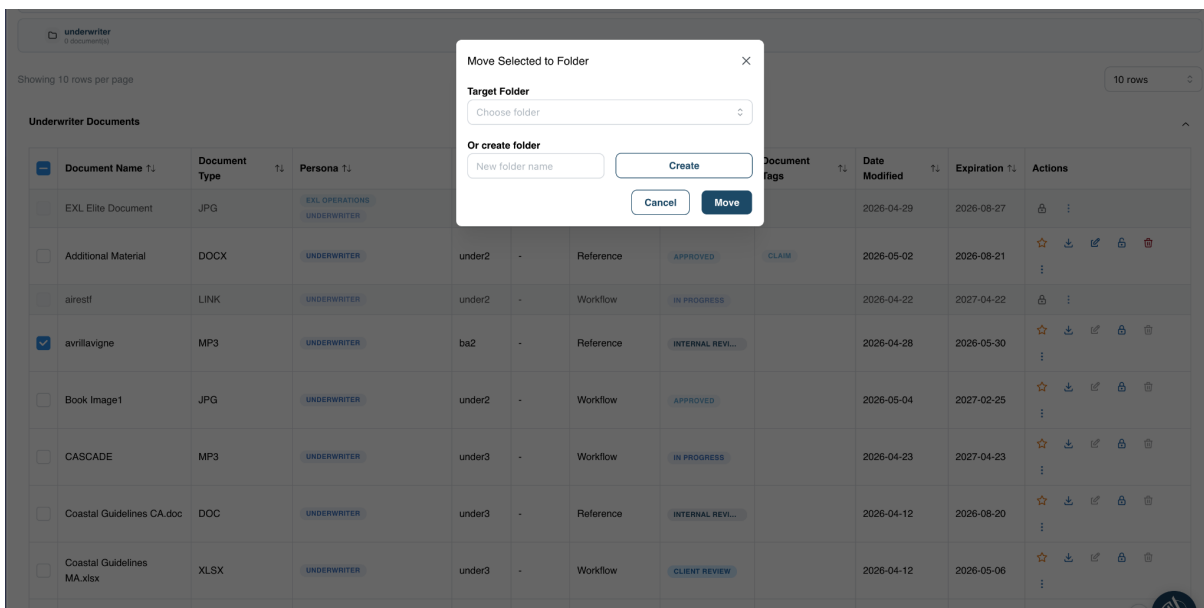


The screenshot shows a table of documents with a modal dialog box overlaid. The dialog box is titled "Delete Form" and contains the text "Are you sure you want to delete this file?". There are two buttons: "Cancel" and "Confirm".

Document Name	Document Type	Persona	Owner	Folder	Content Type	Status	Document Tags	Date Modified	Expiration	Actions
EXL Elite Document	JPG	EXL OPERATIONS UNDERWRITER	ee1	-	Workflow	IN PROGRESS		2026-04-29	2026-08-27	🗑️ ⋮
Additional Material	DOCX	UNDERWRITER	under2	-	Reference	APPROVED	CLAIM	2026-05-02	2026-08-21	⭐ 📄 🗑️ ⋮
airestf	LINK	UNDERWRITER						2026-04-22	2027-04-22	🗑️ ⋮
avrilavigne	MP3	UNDERWRITER						2026-04-28	2026-05-30	⭐ 📄 🗑️ ⋮
Book Image1	JPG	UNDERWRITER	under2	-	Workflow	APPROVED		2026-05-04	2027-02-25	⭐ 📄 🗑️ ⋮
CASCADE	MP3	UNDERWRITER	under3	-	Workflow	IN PROGRESS		2026-04-23	2027-04-23	⭐ 📄 🗑️ ⋮
Coastal Guidelines CA.doc	DOC	UNDERWRITER	under3	-	Reference	INTERNAL REV...		2026-04-12	2026-08-20	⭐ 📄 🗑️ ⋮
Coastal Guidelines MA.xlsx	XLSX	UNDERWRITER	under3	-	Workflow	CLIENT REVIEW		2026-04-12	2026-05-06	⭐ 📄 🗑️ ⋮
Daily Report.pdf	PDF	UNDERWRITER	emp2	-	Workflow	INTERNAL REV...		2026-04-15	2026-08-20	⭐ 📄 🗑️ ⋮

## Move to Folder

Employees are able to move documents to their folder of choice, existing or newly created, using the vertical triple dots in the actions column. Once fields are filled, employees can cancel the action or confirm move the document to the chosen folder.



The screenshot shows a table of documents with a modal dialog box overlaid. The dialog box is titled "Move Selected to Folder" and contains a "Target Folder" dropdown menu, a "New folder name" input field, and "Create", "Cancel", and "Move" buttons.

Document Name	Document Type	Persona	Owner	Folder	Content Type	Status	Document Tags	Date Modified	Expiration	Actions
EXL Elite Document	JPG	EXL OPERATIONS UNDERWRITER						2026-04-29	2026-08-27	🗑️ ⋮
Additional Material	DOCX	UNDERWRITER	under2	-	Reference	APPROVED	CLAIM	2026-05-02	2026-08-21	⭐ 📄 🗑️ ⋮
airestf	LINK	UNDERWRITER	under2	-	Workflow	IN PROGRESS		2026-04-22	2027-04-22	🗑️ ⋮
avrilavigne	MP3	UNDERWRITER	ba2	-	Reference	INTERNAL REV...		2026-04-28	2026-05-30	⭐ 📄 🗑️ ⋮
Book Image1	JPG	UNDERWRITER	under2	-	Workflow	APPROVED		2026-05-04	2027-02-25	⭐ 📄 🗑️ ⋮
CASCADE	MP3	UNDERWRITER	under3	-	Workflow	IN PROGRESS		2026-04-23	2027-04-23	⭐ 📄 🗑️ ⋮
Coastal Guidelines CA.doc	DOC	UNDERWRITER	under3	-	Reference	INTERNAL REV...		2026-04-12	2026-08-20	⭐ 📄 🗑️ ⋮
Coastal Guidelines MA.xlsx	XLSX	UNDERWRITER	under3	-	Workflow	CLIENT REVIEW		2026-04-12	2026-05-06	⭐ 📄 🗑️ ⋮

## Bulk Actions

Employees are able to select multiple documents with the leftmost column of multiple choice squares. Once the desired amount of documents are selected, the UI will display the total amount of selected documents on the bottom left corner, then employees are given the options to: Deselect All, Download Selected, Checkout Selected, Checkin Selected, Favorite All, or move all to desired folder.

Underwriter Documents											
<input type="checkbox"/>	Document Name	Document Type	Persona	Owner	Folder	Content Type	Status	Document Tags	Date Modified	Expiration	Actions
<input type="checkbox"/>	EXL Elite Document	JPG	EXL OPERATIONS UNDERWRITER	ec1	-	Workflow	IN PROGRESS		2026-04-29	2026-08-27	
<input type="checkbox"/>	Additional Material	DOCX	UNDERWRITER	under2	-	Reference	APPROVED	CLAIM	2026-05-02	2026-08-21	
<input type="checkbox"/>	airestf	LINK	UNDERWRITER	under2	-	Workflow	IN PROGRESS		2026-04-22	2027-04-22	
<input checked="" type="checkbox"/>	avrilavigne	MP3	UNDERWRITER	ba2	-	Reference	INTERNAL REV...		2026-04-28	2026-05-30	
<input checked="" type="checkbox"/>	Book Image1	JPG	UNDERWRITER	under2	-	Workflow	APPROVED		2026-05-04	2027-02-25	
<input type="checkbox"/>	CASCADE	MP3	UNDERWRITER	under3	-	Workflow	IN PROGRESS		2026-04-23	2027-04-23	
<input type="checkbox"/>	Coastal Guidelines CA.doc	DOC	UNDERWRITER	under3	-	Reference	INTERNAL REV...		2026-04-12	2026-08-20	
<input type="checkbox"/>	Coastal Guidelines MA.xlsx	XLSX	UNDERWRITER	under3	-	Workflow	CLIENT REVIEW		2026-04-12	2026-05-06	
<input type="checkbox"/>	Daily Report.pdf	PDF	UNDERWRITER	emp2	-	Workflow	INTERNAL REV...		2026-04-15	2026-08-20	
<input type="checkbox"/>	Daily Report1.pdf	PDF	UNDERWRITER	emp2	-	Workflow	INTERNAL REV...		2026-04-15	2026-08-20	

2 selected

Deselect All
Download Selected
Checkout Selected
Check-in Selected
Favorite All
Move to Folder

# Search Bar

Employees are able to utilize the document search bar in the top right corner, where they can input keywords matching document names and only those documents are displayed.

Dashboard Documents Archive Andrew

This website has been created for WPI's CS 3733 Software Engineering as a class project and is not in use by Hanover Insurance.

## Core Commercial Underwriter Resources

Grid List Dropdown Viewer

+ Add Document + Bulk Upload + Add Folder Filter by

add

Folders

- A List of Tutorials for iBank Interface (10 documents)
- nestedfolder test (0 documents)
- Restricted Copies Folder (3 documents)
- underwriter (0 documents)

Showing 10 rows per page 10 rows

### All Documents

<input type="checkbox"/>	Document Name	Document Type	Persona	Owner	Folder	Content Type	Status	Document Tags	Date Modified	Expiration	Actions
<input type="checkbox"/>	Additional Material	DOCX	UNDERWRITER	under2	-	Reference	APPROVED	CLAIM	2026-05-02	2026-08-21	☆ ⬇️ 📄 🔒 🗑️ ⋮
<input type="checkbox"/>	DocADD	MP3	BUSINESS ANALYST	ba3	-	Workflow	IN PROGRESS		2026-04-20	2027-04-20	☆ ⬇️ ⋮

Page 1 of 1

440 Lincoln St Worcester

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# Tags

Documents have a column dedicated to tags, where they are given more personalized attributes. The document system has preset tags available, but employees are given the opportunity to create tags they wish to give to documents. Once tags are assigned, employees can use the filter option or search bar to find the keywords of the tags.

The screenshot shows a document management interface. At the top, there is a 'Recently Viewed' section with a card for 'AA Continued Files' (PDF, ACTUARIAL ANALYST). Below this is a 'Folders' section with four folders: 'A List of Tutorials for iBank Interface' (10 document(s)), 'nestedfolder test' (0 document(s)), 'Restricted Copies Folder' (0 document(s)), and 'underwriter' (0 document(s)). A 'Showing 10 rows per page' indicator and a '10 rows' dropdown are present. The main content is a table of documents, categorized into 'Underwriter Documents', 'Business Analyst Documents', and 'Actuarial Analyst Documents'. The table has columns for Document Name, Document Type, Persona, Owner, Folder, Content Type, Status, Document Tags, Date Modified, Expiration, and Actions. Three rows are visible, each with a tag 'ACTUARIAL ANALYST' and a status like 'IN PROGRESS' or 'CLIENT REVIEW'.

Document Name	Document Type	Persona	Owner	Folder	Content Type	Status	Document Tags	Date Modified	Expiration	Actions
AA Updated Roster	JPG	ACTUARIAL ANALYST	aa1	-	Reference	IN PROGRESS	FINANCIAL	2026-04-27	2026-05-08	☆ ⬇ ⋮
AA Continued Files	PDF	ACTUARIAL ANALYST	aa2	-	Workflow	CLIENT REVIEW	FILEBREAKSWEBS...	2026-04-27	2026-08-27	☆ ⬇ ⋮
AA Info	PDF	ACTUARIAL ANALYST	aa1	-	Reference	CLIENT REVIEW	FILEBREAKSWEBS...	2026-04-27	2026-07-27	☆ ⬇ ⋮

Tags can be added to documents when editing or by selecting the “Advanced Tags” button in either the edit document or add document pop-up. This allows for you to create new tags given a name or to delete a current tag. Clicking “Done” to exit that pop-up.

The screenshot shows a document management interface with a dark background. A pop-up window titled 'Advanced Tag Management' is open in the center. The pop-up has a close button (X) in the top right corner. It contains two sections: 'Enter a New Tag:' with a text input field and a 'Create Tag' button; and 'Enter a tag to Delete:' with a dropdown menu labeled 'Select a Tag' and a 'Delete Tag' button. Below these sections is a 'Done' button. The background shows a table of documents with columns for Document Name, Document Type, Persona, Owner, Folder, Content Type, Status, Document Tags, Date Modified, Expiration, and Actions. The table is partially obscured by the pop-up window.

## Folders

Employees are able to organize documents beyond persona specifics, they can place documents into folders for easier access. Once documents are in a folder, the employee can click on the designated folder and all of the documents will be displayed, and only those documents, labeled by the pink folder badge in the folders column. Further, folders allow for more private access to documents by limiting the ability to see/use them to employees of the same persona and even as specific as certain users.

The screenshot shows a document management interface. At the top, there is a breadcrumb trail: "A List of Tutorials for iBank Interface" (3 documents). Below this, a folder tree is visible with three folders: "nestedfolder test" (3 documents), "Restricted Copies Folder" (3 documents), and "underwriter" (8 documents). Below the folder tree, it says "Showing 10 rows per page" and "10 rows".

The main section is titled "All Documents" and contains a table with the following columns: Document Name, Document Type, Persona, Owner, Folder, Content Type, Status, Document Tags, Date Modified, Expiration, and Actions.

Document Name	Document Type	Persona	Owner	Folder	Content Type	Status	Document Tags	Date Modified	Expiration	Actions
Admin Employee Management Tutorial	LINK	UNDERWRITER, BUSINESS ANALYST, ACTUARIAL ANALYST, EXL OPERATIONS	emp1	A LIST OF TUTORIALS ...	Reference	INTERNAL ...		2026-05-03	2030-05-03	🌟 ⬇️ 🗑️ ⋮
Admin Transaction History Tutorial	LINK	UNDERWRITER, BUSINESS ANALYST, ACTUARIAL ANALYST, EXL OPERATIONS	emp1	A LIST OF TUTORIALS ...	Reference	INTERNAL ...		2026-05-03	2030-05-03	🌟 ⬇️ 🗑️ ⋮
Notifications Tutorial	LINK	UNDERWRITER, BUSINESS ANALYST, ACTUARIAL ANALYST, EXL OPERATIONS	emp1	A LIST OF TUTORIALS ...	Reference	INTERNAL ...		2026-05-03	2030-05-03	🌟 ⬇️ 🗑️ ⋮
Personalized Profile Tutorial	LINK	UNDERWRITER, BUSINESS ANALYST, ACTUARIAL ANALYST, EXL OPERATIONS	emp1	A LIST OF TUTORIALS ...	Reference	INTERNAL ...		2026-05-03	2030-05-03	🌟 ⬇️ 🗑️ ⋮
Basic Dashboard Tutorial	LINK	BUSINESS ANALYST, UNDERWRITER, ACTUARIAL ANALYST, EXL OPERATIONS	emp1	A LIST OF TUTORIALS ...	Reference	INTERNAL ...		2026-05-03	2030-05-03	🗑️ ⋮
Finding Documents Tutorial	LINK	UNDERWRITER, BUSINESS ANALYST, ACTUARIAL ANALYST, EXL OPERATIONS	emp1	A LIST OF TUTORIALS ...	Reference	INTERNAL ...		2026-05-03	2030-05-03	🌟 ⬇️ 🗑️ ⋮
Documents Tutorial	LINK	BUSINESS ANALYST	ba2	A LIST OF TUTORIALS ...	Reference	IN PROGRE...		2026-05-03	2026-06-30	🌟 ⬇️ 🗑️ ⋮

## Creating Folders and Permissions

By clicking the “Add Folder” button in the top left corner, employees are able to add new folders to the documents page with their desired folder name, assigned personas, and they are also able to restrict folder access by choosing which employees can access their created folder. Once fields are filled, they can click a create button and the folder will be created.

The screenshot shows the "Create Folder" dialog box in the document management interface. The dialog has three sections: "Folder Name" with a text input field containing "Enter folder name"; "Folder Persona" with a dropdown menu showing "Select personas"; and "Restricted Users" with a dropdown menu showing "Select users who can access this folder". Below the dropdowns, a list of users is visible: emp2, aa1, johnbusiness1, ba3, aa2, and ba2. The background shows the document management interface with a folder tree and a table of documents.

## Duplicating and Nesting Folders

Similar to other storage systems such as google drive, the folders on the documents page also have the ability to store other folders, for higher levels of organization. Employees are able to edit folder fields similar to the ones presented when creating, and they are able to duplicate folders, given a confirmation message when doing so. The duplicated folder will indicate it is a copy by adding “copy” in the name.

The screenshot shows the 'Business Analyst Resources' page in the Hanover Insurance Group system. At the top, there's a navigation bar with 'Dashboard', 'Documents', and 'Archive'. Below that, a search bar and a 'Filter by' button are visible. The main content area is divided into 'Folders' and 'Favorites' sections. The 'Folders' section lists several folders, including 'A List of Tutorials for iBank Interface', 'BA and AA Combined', 'Business Analyst Folder Edit AA', 'nestedFolder test', and 'Restricted Copies Folder'. A context menu is open over the 'Restricted Copies Folder', showing options: 'Edit Folder', 'Delete Folder', and 'Duplicate Folder'. Below the folders, a table displays document details. The table has columns for Document Name, Document Type, Persona, Owner, Folder, Content Type, Status, Document Tags, Date Modified, Expiration, and Actions. Two documents are listed: 'P1140443' (JPG) and 'CS Resume' (DOC).

Document Name	Document Type	Persona	Owner	Folder	Content Type	Status	Document Tags	Date Modified	Expiration	Actions
P1140443	JPG	ACTUARIAL ANALYST BUSINESS ANALYST	eo3	-	Reference	IN PROGRESS		2026-05-03	2026-05-08	Star, Download, Copy, Share, Delete
CS Resume	DOC	BUSINESS ANALYST	ba2	-	Reference	CLIENT REVIEW		2026-04-28	2026-05-09	Star, Download, Copy, Share, Delete, Preview

In addition, employees can “nest” folders by putting one folder within another. Changing the level of a folder in the “Edit Folder” pop-up can put a folder within a folder for more complicated projects and sub-projects. This pop-up also can change the persona, users, and name of the folder.

The screenshot shows the 'Edit Folder' pop-up dialog. The dialog has a title 'Edit Folder' and a close button. It contains several fields: 'Folder Name' (set to 'Copy Folder'), 'Parent Folder' (set to 'Restricted Copies Folder'), 'Persona' (set to 'Admin' and 'Business Analyst'), and 'Restricted Users' (a dropdown menu). There are 'Cancel' and 'Save Changes' buttons at the bottom. The background shows the same document list as the previous screenshot, but with a 'Copy Folder' folder highlighted under the 'Restricted Copies Folder'.

Here is an example of a nested folder with documents and a copied folder together.

The screenshot shows a document management interface. At the top, there's a breadcrumb trail: Root / Restricted Copies Folder / Copy Folder. Below this, a 'Folders' section lists several folders, including 'Copy Folder' which is highlighted. A table titled 'All Documents' displays a list of documents with columns for Document Name, Document Type, Persona, Owner, Folder, Content Type, Status, Document Tags, Date Modified, Expiration, and Actions. The 'Folder' column for all documents in this table is 'COPY FOLDER'.

Document Name	Document Type	Persona	Owner	Folder	Content Type	Status	Document Tags	Date Modified	Expiration	Actions
bulk_Test1.JPG (Copy)	JPG	BUSINESS ANALYST	ba3	COPY FOLDER	Reference	IN PROGRESS		2026-04-29	2026-05-28	Star, Download, Copy, Edit, Share, Delete
bulk_Test13.JPG (Copy)	JPG	BUSINESS ANALYST	ba3	COPY FOLDER	Reference	IN PROGRESS		2026-04-29	2026-05-30	Star, Download, Copy, Edit, Share, Delete
bulk_Test23.JPG (Copy)	JPG	BUSINESS ANALYST	ba3	COPY FOLDER	Reference	IN PROGRESS		2026-04-29	2026-05-07	Star, Download, Copy, Edit, Share, Delete
bulk_Test43.JPG (Copy)	JPG	BUSINESS ANALYST	ba3	COPY FOLDER	Reference	IN PROGRESS		2026-04-29	2026-05-08	Star, Download, Copy, Edit, Share, Delete
test file nested (Copy)	JPEG	BUSINESS ANALYST	ba2	COPY FOLDER	Reference	INTERNAL REVIEW		2026-04-26	2026-05-08	Star, Download, Copy, Edit, Share, Delete
TESTINGTEST (Copy)	LINK	BUSINESS ANALYST	ba2	COPY FOLDER	Reference	IN PROGRESS		2026-04-28	2027-04-28	Star, Download, Copy, Edit, Share, Delete
TransactionTest (Copy)	LINK	BUSINESS ANALYST	ba2	COPY FOLDER	Reference	IN PROGRESS		2026-04-27	2026-06-04	Star, Download, Copy, Edit, Share, Delete

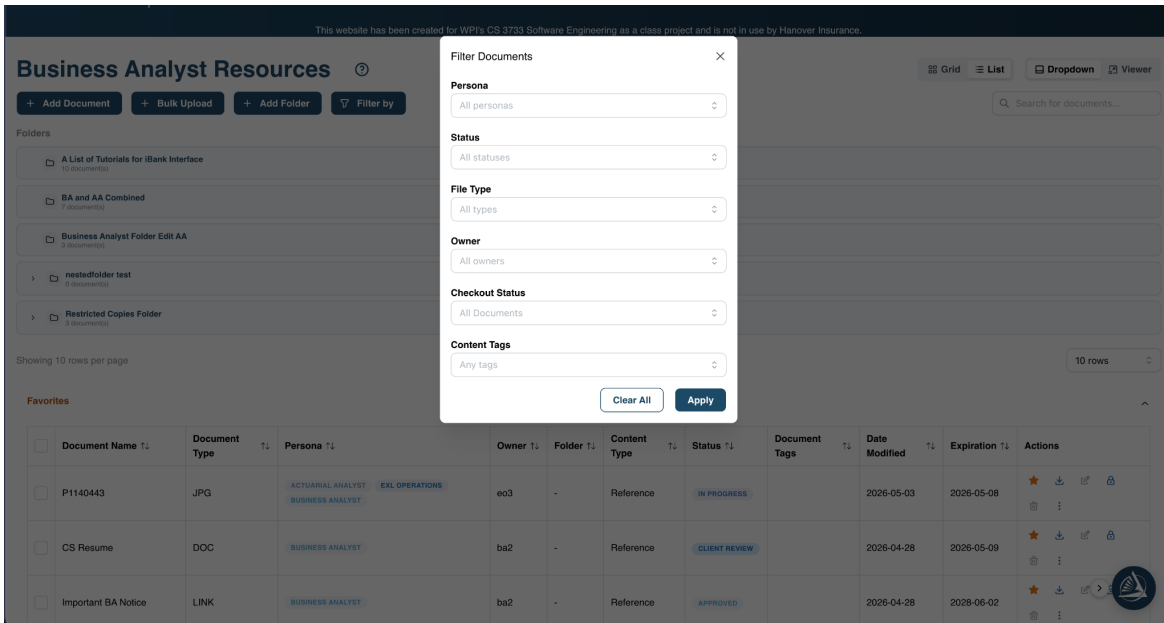
## Deleting Folders

Employees are able to delete folders in the same dropdown as edit and duplicate, where a confirmation message will appear asking the admin to confirm folder deletion. Once deleted, the folder and documents in that folder will appear in the trash. Documents and folders can be retrieved from the trash by admins, and documents can be extracted from trashed folders.

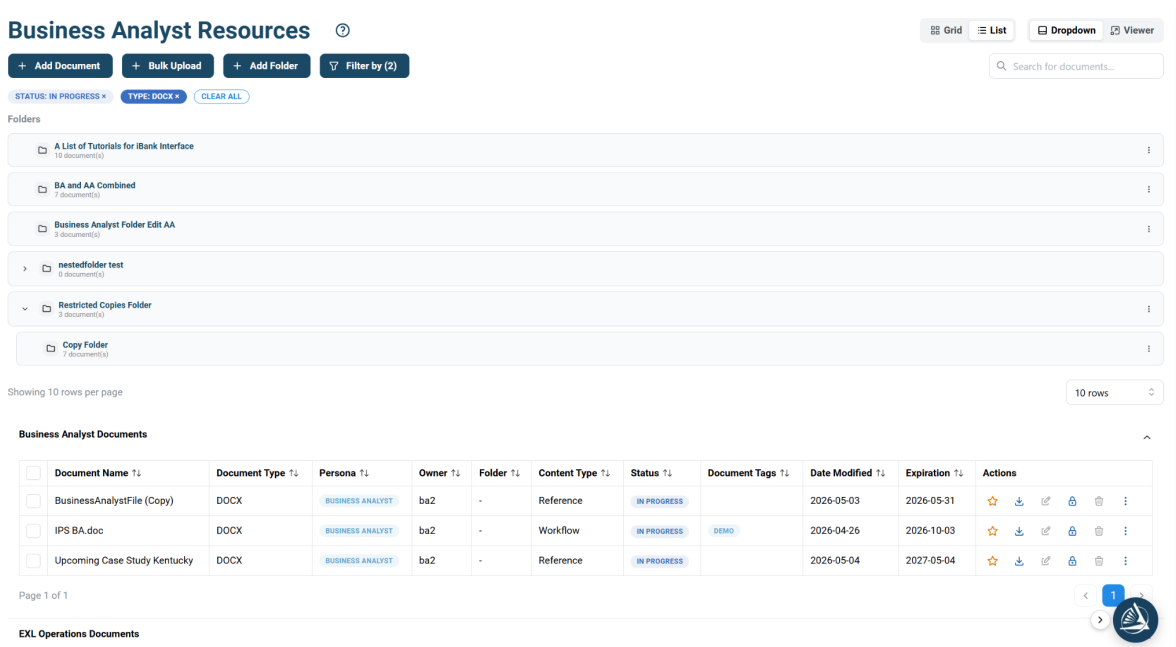
The screenshot shows the same document management interface, but with a 'Delete Form' dialog box open. The dialog box contains the text: 'Delete Form', 'Are you sure you want to delete this folder? All documents within the folder will be moved to trash.', and two buttons: 'Cancel' and 'Confirm'. The background interface is dimmed, showing the folder list and the 'All Documents' table.

# Filter

Presented by the “Filter By” button in the top left corner, employees are able to find specific documents through attribute specification. Employees are able to filter and find documents by: Persona, Document Status, File Type, Owner, Checkout Status, and Tags. The filter by button will display all current filters active and each filter section has its own badge that will be displayed, telling the user which filters are currently active. A clear all button will appear next to the badges allowing the employee to clear all filters, or there will also be a clear all button if the employee clicks on the filter by button again.



Filters can be stacked to focus on documents that only meet two or more specific requirements. Non-relevant documents are filtered out.



## Trash (Admin Only)

Admins have an additional button in the top left corner of the documents page, a red “Trash” button. In the trash, admins are able to see all documents and folders that have been soft deleted, along with the file name, owner, and deletion dates. Admins are able to search for specific deleted documents using the search bar and/or the filter by persona dropdown. Additionally, admins can preview deleted documents using the magnifying glass icon, next to that icon is the “restore” button, which lets admins take the document out of the trash and back to its original place. Finally, there is a “delete permanently “ button, where admins can permanently remove a document from the system with no way of returning or restoring. Both restore and delete permanently options have confirmation messages.

The screenshot displays the 'Trash - Deleted Documents' modal window. At the top, there is a search bar labeled 'Search by name or owner...' and a 'Filter by persona' dropdown. Below this, a 'Select all (7)' checkbox is visible. The content is organized into two sections: 'Deleted folders' and 'Deleted standalone documents'.

**Deleted folders:**

- A List of Tutorials for iBank Interface (Copy)**  
Owner: ba2 - Deleted: 5/3/2026  
12 deleted document(s)  
Buttons: Show contents, Restore Folder, Delete Folder Permanently

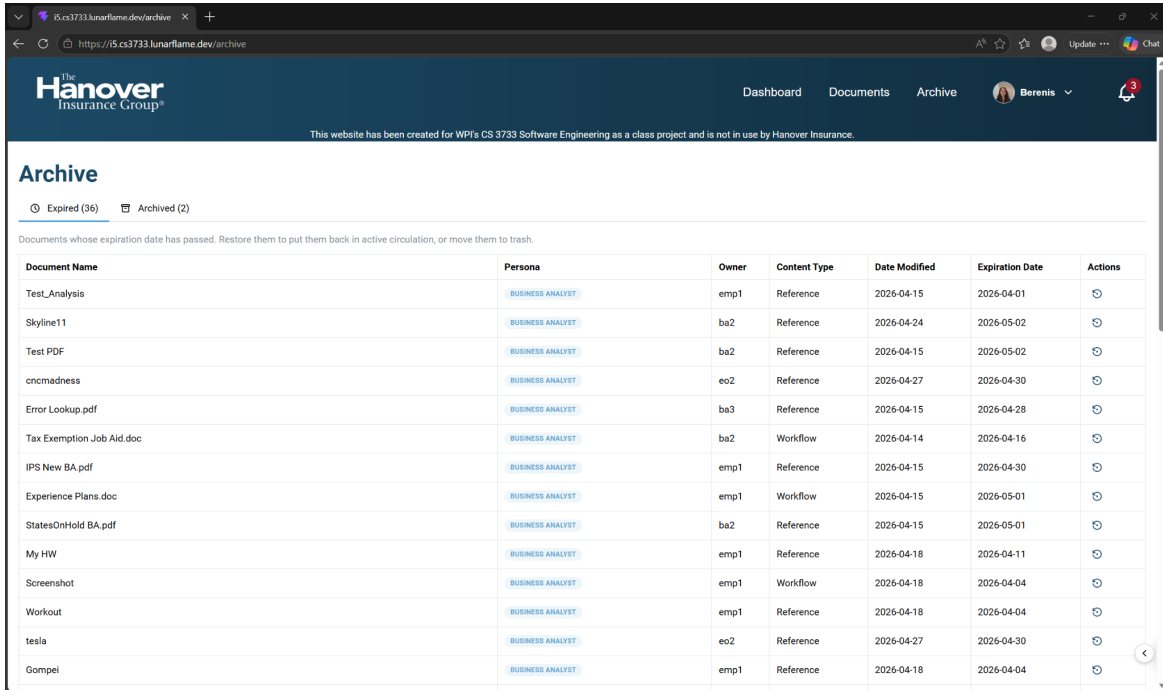
**Deleted standalone documents:**

- Channel Budgeting Tool 2**  
Owner: ba2 - Deleted: 4/25/2026  
Buttons: UNDERWRITER, IN PROGRESS, LINK, Restore, Delete Permanently
- name**  
Owner: aa1 - Deleted: 4/30/2026  
Buttons: UNDERWRITER, IN PROGRESS, HTTPS:ID, Restore, Delete Permanently
- Enhancing Access and Engagement\_ (3)**  
Owner: ba3 - Deleted: 5/3/2026  
Buttons: BUSINESS ANALYST, IN PROGRESS, PDF, Restore, Delete Permanently
- Testing Presenting**  
Owner: under2 - Deleted: 4/28/2026  
Buttons: UNDERWRITER, IN PROGRESS, PDF, Restore, Delete Permanently
- final test of functionality**  
Owner: emp1 - Deleted: 5/2/2026  
Buttons: UNDERWRITER, IN PROGRESS, PNG, Restore, Delete Permanently

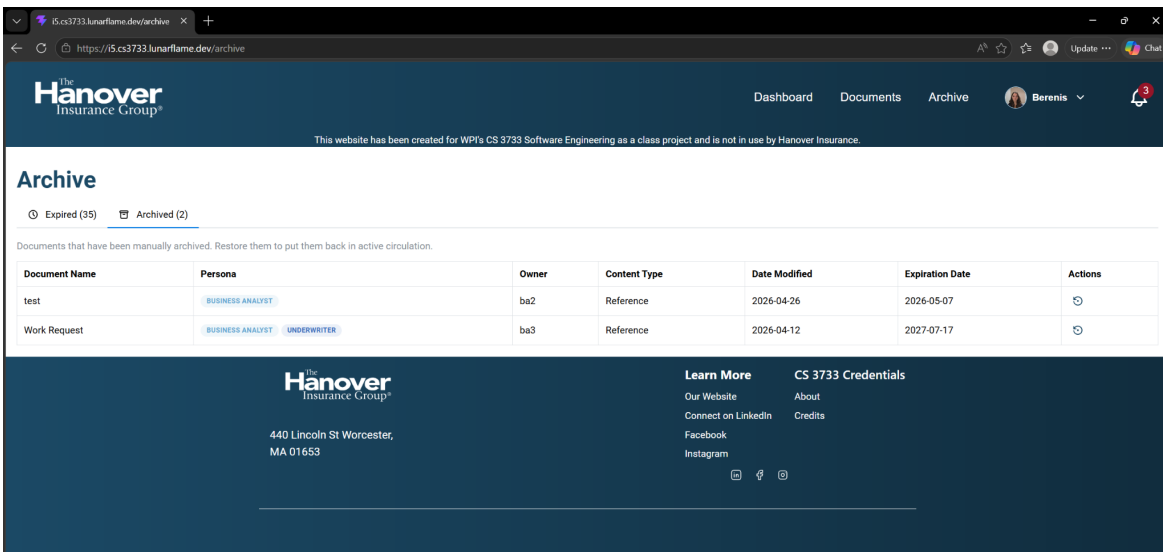
The background shows the 'All Content' page with a table of documents and a sidebar with navigation options like 'Add Document', 'Bulk Upload', and 'Add Folder'.

# Archive

All users have access to the Archive, which contains documents that are either expired or not in circulation. Going to the Archive tab brings up a list of expired documents based upon your user persona. Clicking the blue undo document resets the expiration date of a document to be today instead so you can update it more thoroughly in the edit window, removing it from the list and placing it back into circulation.



Going to the Archived page shows documents that are archived (not expired). Restoring an Archived document resets its status to be “In Progress” and resets the expiration date to be today for urgency. Any documents whose status is set to be “Archived” are sent to this page and only displayed for the logged in user’s persona.



# Admin Permissions

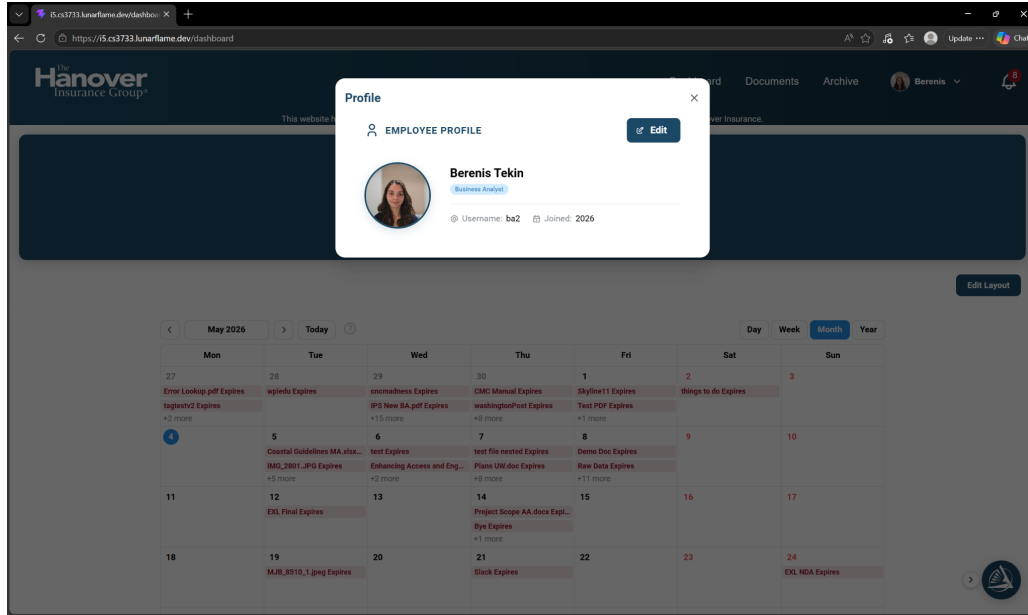
Admin users have the ability to see all documents that are archived or expired, along with the ability to delete expired or archived documents. Clicking the trash can icon next to a document deletes it from the Archive and sends it to the Trash.

The screenshot shows a web browser window displaying the 'Archive' page of The Hanover Insurance Group. The page header includes the company logo, navigation links for Dashboard, Employees, Documents, and Archive, and a user profile for Molly. A disclaimer states: 'This website has been created for WPI's CS 3733 Software Engineering as a class project and is not in use by Hanover Insurance.' Below the header, the 'Archive' section shows filters for 'Expired (56)' and 'Archived (3)'. A message reads: 'Documents whose expiration date has passed. Restore them to put them back in active circulation, or move them to trash.' A table lists 14 documents with the following columns: Document Name, Persona, Owner, Content Type, Date Modified, Expiration Date, and Actions. The 'Test PDF' row is highlighted, and a 'Move to Trash' button is visible next to it.

Document Name	Persona	Owner	Content Type	Date Modified	Expiration Date	Actions
things to do	UNDERWRITER	under2	Reference	2026-04-12	2026-05-03	
Test_Analysis	BUSINESS ANALYST	emp1	Reference	2026-04-15	2026-04-01	
CMC Manual	UNDERWRITER	emp2	Reference	2026-04-12	2026-05-01	
Diagrampng	UNDERWRITER	emp2	Workflow	2026-04-08	2026-04-23	<b>Move to Trash</b>
Test PDF	BUSINESS ANALYST	ba2	Reference	2026-04-15	2026-05-02	
cncmadness	BUSINESS ANALYST	eo2	Reference	2026-04-27	2026-04-30	
Error Lookup.pdf	BUSINESS ANALYST	ba3	Reference	2026-04-15	2026-04-28	
IPS UW.xlsx	UNDERWRITER	under3	Workflow	2026-04-15	2026-04-02	
Collaborative Tool.xlsx	UNDERWRITER	emp1	Workflow	2026-04-15	2026-04-13	
wpliedu	UNDERWRITER	under2	Reference	2026-04-14	2026-04-29	
Tax Exemption Job Aid.doc	BUSINESS ANALYST	ba2	Workflow	2026-04-14	2026-04-16	
Property View UW.doc	UNDERWRITER	emp2	Workflow	2026-04-15	2026-02-12	
washingtonPost	UNDERWRITER	under2	Reference	2026-04-14	2026-05-01	
IPS New BA.pdf	BUSINESS ANALYST	emp1	Reference	2026-04-15	2026-04-30	

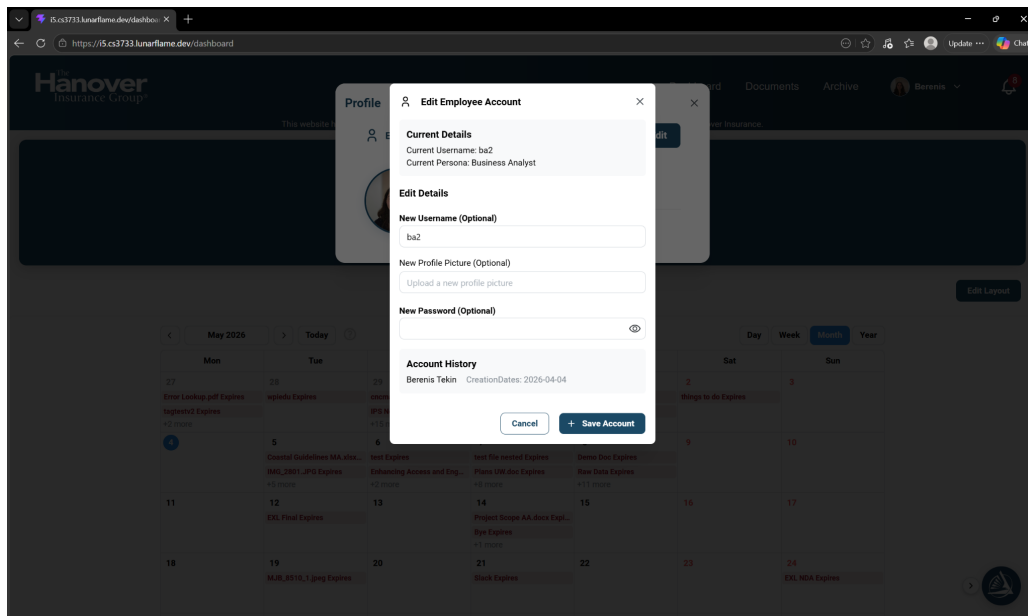
## Profile

The Profile pop-up is always found in the top right of the Expires menu next to the notifications bell. Clicking on the Profile icon and then on “Profile” in the dropdown brings up the current logged in user’s profile. Clicking anywhere else on the page closes the pop-up.



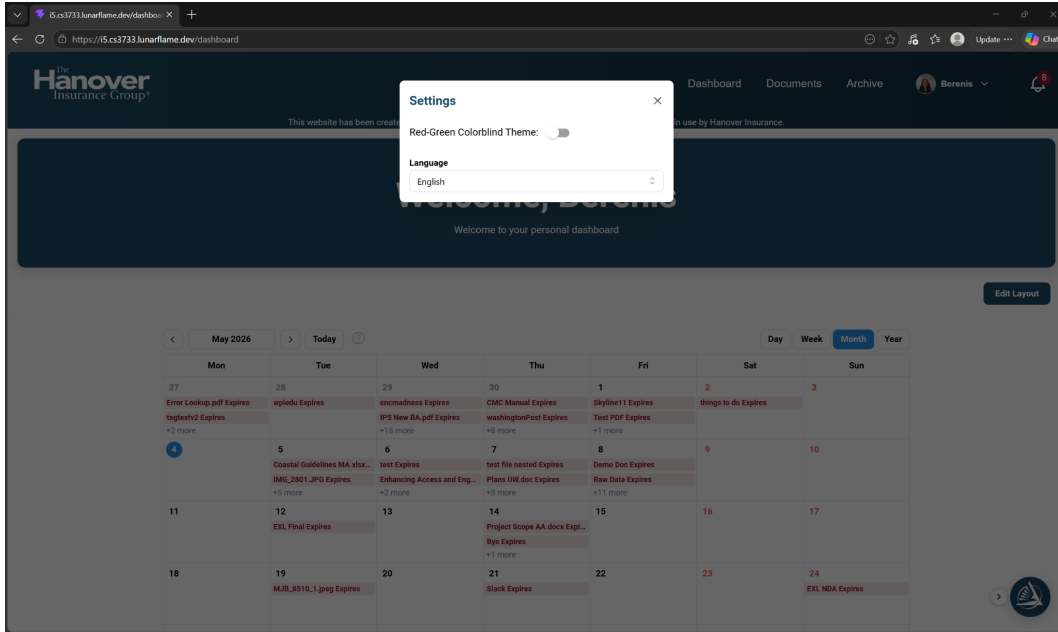
## Updating Information

Clicking the “Edit” button brings up the ability for the employee to change information about themselves. Specifically it allows for a user to update their own username, profile image, or password. After making your edits, click “Save Account” and your recent account updates will be saved.



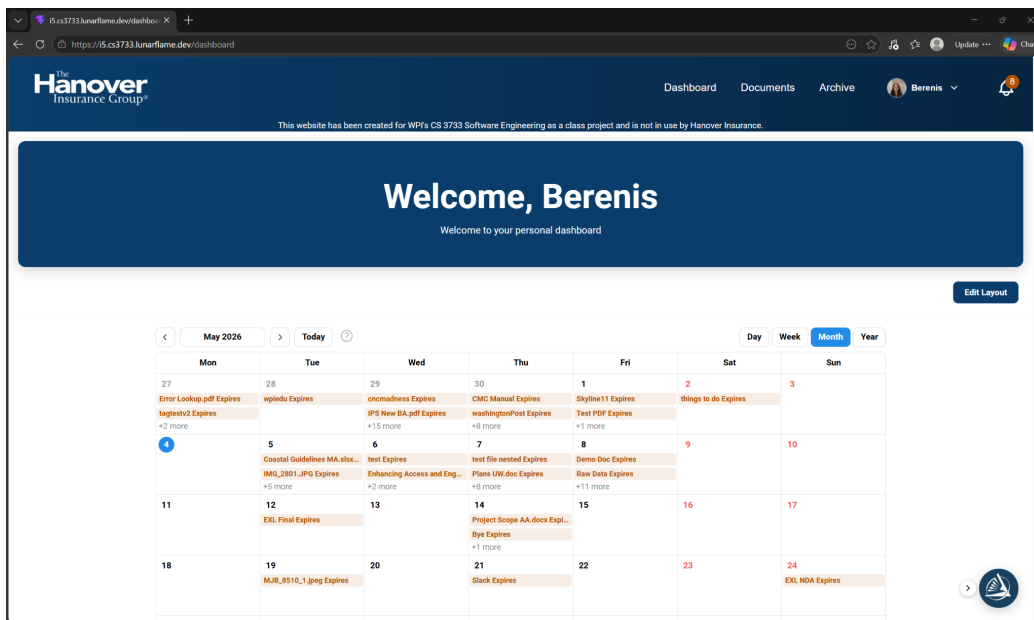
# Settings

Settings contains various adjustable features meant to make iBank more accessible to employees and guests visiting it. You can navigate to Settings at any time by clicking the Profile Icon and navigating down to the “Settings” tab. This opens up the Settings pop-up.



# High Contrast Theme

One of the main features in setting is a high-contrast toggle meant to adjust the color palette for red-green colorblind users. Toggling the switch resets the screen’s colors to be in high contrast mode or back to regular mode. See below for what the default documents page looks like when in high contrast mode.



## Translation Services

Another feature in the settings is our translation service. Currently, we have ten languages that you can select when visiting our website. These include:

- English (default)
- Espanol
- Mandarin
- Hindi
- French
- Arabic
- Bengali
- Russian
- Turkish
- Irish

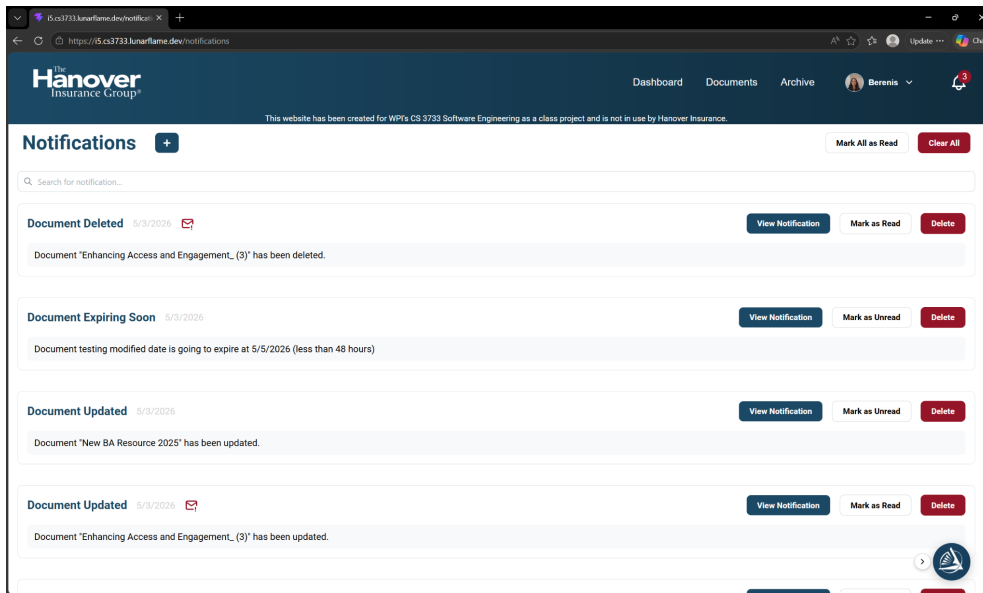
Clicking your preferred language resets the website to be in that language. You can always navigate back to the settings to reset the language. Note that this only sets relevant text to be in the new language chosen, this does not affect document/folder/meta tag names, employee names, and information within said documents due to these being name-sensitive.

The screenshot shows a web dashboard for 'The Hanover Insurance Group'. The page is in Spanish. At the top, there is a navigation bar with 'Panel', 'Documentos', 'Archivo', and a user profile for 'Berenis'. Below the navigation bar, there is a large blue banner with the text '¡Bienvenido!, Berenis' and 'Bienvenido a su panel personal'. Below the banner, there is a calendar view for May 2026. The calendar shows documents for each day, with links to the documents. The documents are listed in a grid format, with columns for each day of the week (Lun., Mar., Mié., Jue., Vie., Sáb., Dom.).

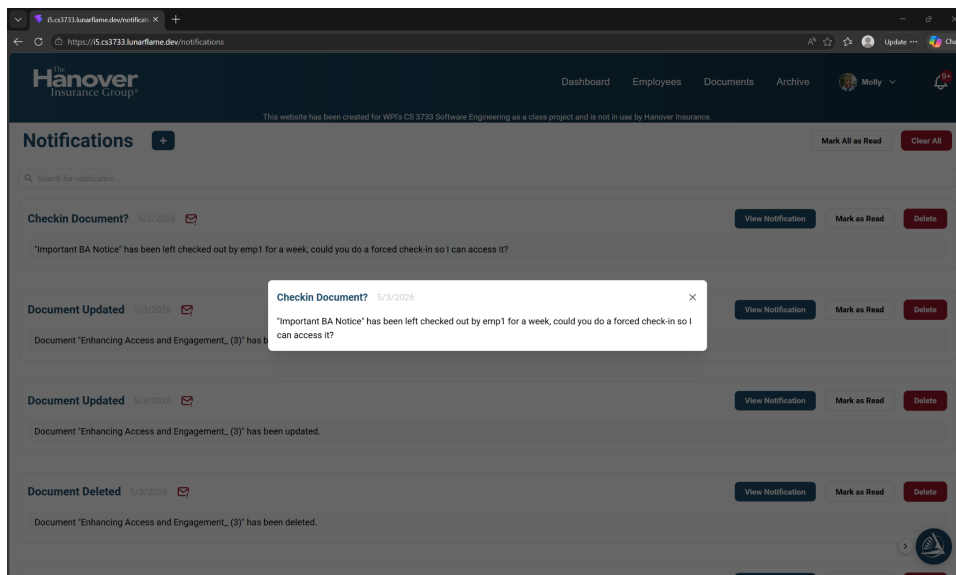
Lun.	Mar.	Mié.	Jue.	Vie.	Sáb.	Dom.
27 Error Lookup.pdf Caduca tagtestv2 Caduca +2 more	28 wpledu Caduca	29 cnomadness Caduca IPS New BA.pdf Caduca +15 more	30 CMC Manual Caduca washingtonPost Caduca +8 more	1 Skyline11 Caduca Test PDF Caduca +1 more	2 things to do Caduca	3
4	5 Coastal Guidelines MA.xlsx... IMG_3801.JPG Caduca +5 more	6 test Caduca Enhancing Access and Eng... +2 more	7 test file nested Caduca Plans UIW.doc Caduca +8 more	8 Demo Doc Caduca Raw Data Caduca +11 more	9	10
11	12 EXL Final Caduca	13	14 Project Scope AA.docx Cad... Bye Caduca +1 more	15	16	17
18	19 MJB_8510_1.jpeg Caduca	20	21 Slack Caduca	22	23	24 EXL NDA Caduca

# Notifications

The notifications page is used for sending updates about document statuses and for internal messaging. It can be accessed via the notification bell in the top right corner of the menu. Unread notifications have a red message envelope icon next to them. You can look at a notification pop-up using the “View Notification” button, can mark a notification as read or unread, and can delete a notification for yourself.



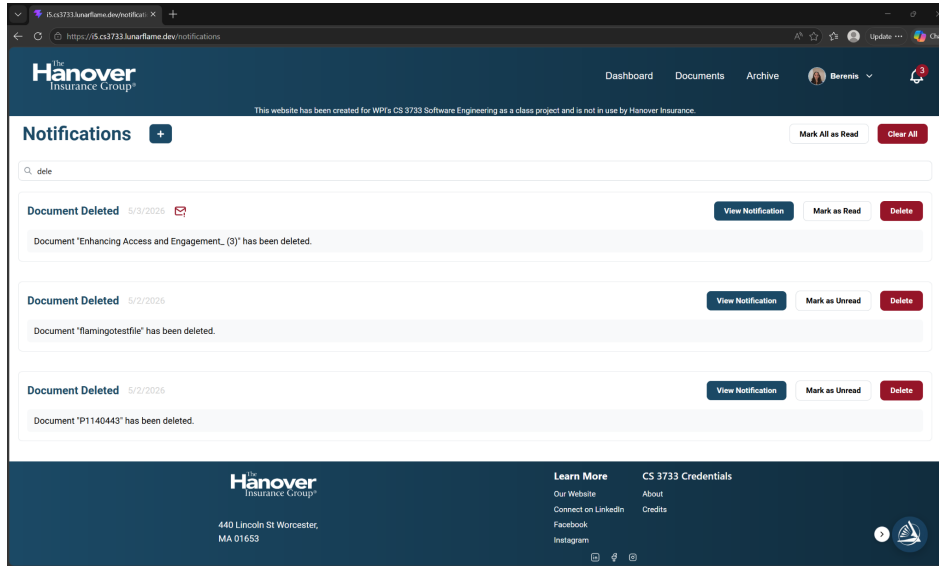
You can also mark all as read or clear all notifications quickly and easily using the buttons in the top right corner. The notifications you see are personalized to you but could be sent to multiple people, so deleting a notification only affects your own inbox.



Certain notifications are from the system itself, alerting users when a document has been updated, deleted, or is soon going to expire. These system notifications are only sent to users whose persona matches the relevant document (i.e. a Business Analyst only gets notifications that are relevant to Business Analyst documents). Admin get notifications for all updates, deletes, and expirations.

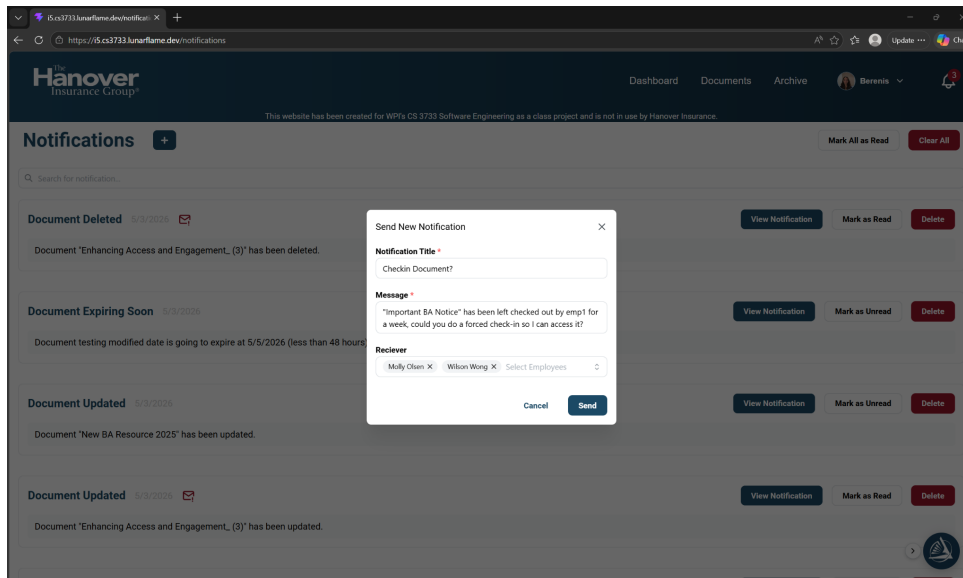
## Search Bar

You can find a specific notification by looking it up in the search bar.



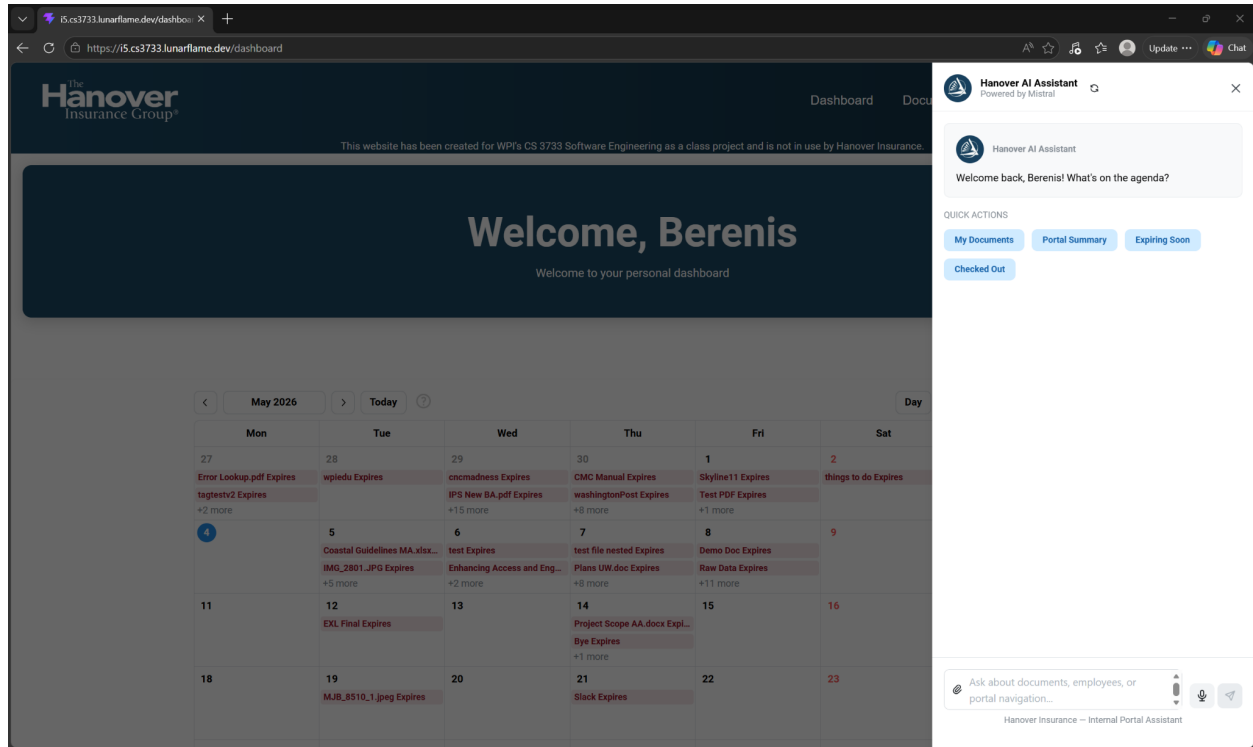
## Sending Notifications

To send a notification, click the plus icon next to the notifications title. In the pop-up, enter the title, the message, and the recipient for the message. Clicking "Send" buttons sends the message and closes the pop-up.



# Hanover AI Assistant

The Hanover AI Assistant was designed to be your central hub for information, allowing you to seamlessly find answers, search company documents, and complete tasks all in one unified place. Instead of digging through folders or watching long videos to find what you need, you can simply ask the Assistant.



## Types of Prompts and Actions

- **Ask Direct Questions:** Type your question naturally, and the Assistant will read through the database to provide a direct answer.
- **Search Across All Documents:** The Assistant doesn't just search text. It can pull information from PDFs, Word documents, PowerPoints, and even the spoken transcripts of uploaded audio and video files.
- **Find Exact Sources:** When the Assistant answers a question, it relies on your uploaded files. It will point you directly to the documents or media it used so you can verify the information yourself.

## Executing System Actions:

Beyond just searching, you can ask the Assistant to perform tasks directly within the portal. Just tell it what you want to do:

- **Manage Documents:** You can ask the Assistant to add, delete, favorite, or check out documents. Example: "favorite the document named wpiedu" or "what documents are currently checked out".

- **Portal Data & Settings:** Need a quick overview? Ask the Assistant for a document statistics chart or a portal activity summary. You can even ask it to change your portal theme (e.g., "change the theme to high visibility").
- **Team Communication:** You can instruct the Assistant to create and send notifications to specific users or roles. Example: "create a notification with title: 'NotifUnder2', message: 'Hello under2', and send it to under2".
- **Admin Controls:** Administrators can use the Assistant to quickly manage the team, such as adding new employees, deleting users, or restoring deleted documents. Example: "Restore the document named: \_\_\_\_".

Here are a few example prompts that can be run in the chatbot, including seeing the active user portal history, finding checked-out documents, and even adding new documents.

The screenshot shows a web browser window displaying the Hanover AI Assistant interface. The main dashboard area features a calendar for May 2026 with various document expiration dates listed for each day. On the right side, there is a chat window titled 'Hanover AI Assistant' with a 'Give me a portal activity summary' button. The chat window displays a 'Portal Activity Summary' with the following data:

Category	Count
Total Documents	242
Active	182
Expired	57
Archived	3
In Trash	6
Favorited	5
Checked Out	5
Expiring (30d)	60
Total Employees	22

At the bottom of the chat window, there is a text input field with the placeholder text 'Ask about documents, employees, or portal navigation...' and a 'Send' button. The footer of the page reads 'Hanover Insurance - Internal Portal Assistant'.

is.cs3733.lunarflame.dev/dashboard

The Hanover Insurance Group

Dashboard

This website has been created for WPI's CS 3733 Software Engineering as a class project and is not in use by Hanover Insurance.

# Welcome, Berenis

Welcome to your personal dashboard

May 2026 Today

Mon	Tue	Wed	Thu	Fri	Sat
27 Error Lookup.pdf Expires tagtestv2 Expires +2 more	28 wpiedu Expires	29 cnmadness Expires IPS New BA.pdf Expires +15 more	30 CMC Manual Expires washingtonPost Expires +8 more	1 Skyline11 Expires Test PDF Expires +1 more	2 things to do Expires
4	5 Coastal Guidelines MA.xlsx... IMG_2801.JPG Expires +5 more	6 test Expires Enhancing Access and Eng... +2 more	7 test file nested Expires Plans UW.doc Expires +8 more	8 Demo Doc Expires Raw Data Expires +11 more	9
11	12 EXL Final Expires	13	14 Project Scope AA.docx Expl... Bye Expires +1 more	15	16
18	19 MJB_8510_1.jpeg Expires	20	21 Slack Expires	22	23

Hanover AI Assistant  
Powered by Mistral

Berenis

Which documents are currently checked out?

Hanover AI

Here are the 5 documents currently checked out:

- EXL Elite Document (Checked out by: admin2)
- alrestf (Checked out by: admin2)
- A-Practical-Approach-To-Understanding-Music-Theory-1701285167.pdf (Checked out by: You)
- 2026 Student Project Agreement and Release\_Havover CS 3733 Software Engineering D Term 2026.pdf (Checked out by: admin)
- Basic Dashboard Tutorial (Checked out by: admin)

EXL Elite Document  
Owner: @eo1

alrestf  
Owner: @sunder2

A-Practical-Approach-To-Understanding...  
Owner: @ba3

2026 Student Project Agreement and Rel...  
Owner: @ba2

Basic Dashboard Tutorial

Ask about documents, employees, or portal navigation...

Hanover Insurance — Internal Portal Assistant

is.cs3733.lunarflame.dev/dashboard

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May 2026 Today

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27 Error Lookup.pdf Expires tagtestv2 Expires +2 more	28 wpiedu Expires	29 cnmadness Expires IPS New BA.pdf Expires +15 more	30 CMC Manual Expires washingtonPost Expires +8 more	1 Skyline11 Expires Test PDF Expires +1 more	2 things to do Expires
4	5 Coastal Guidelines MA.xlsx... IMG_2801.JPG Expires +5 more	6 test Expires Enhancing Access and Eng... +2 more	7 test file nested Expires Plans UW.doc Expires +8 more	8 Demo Doc Expires Raw Data Expires +11 more	9
11	12 EXL Final Expires	13	14 Project Scope AA.docx Expl... Bye Expires +1 more	15	16
18	19 MJB_8510_1.jpeg Expires	20	21 Slack Expires	22	23

Hanover AI Assistant  
Powered by Mistral

Berenis

add a new document called "Upcoming Case Study Kentucky" (File already uploaded — use this URL: <https://kjiwsqbinxmdzvdzbdgji.supabase.co/storage/t=1777876951971>)

Hanover AI

The document **Upcoming Case Study Kentucky** has been added successfully. Is there anything else you'd like to do with this document?

Document "Upcoming Case Study Kentucky" created successfully.

Ask about documents, employees, or portal navigation...

Hanover Insurance — Internal Portal Assistant

## Voice Commands

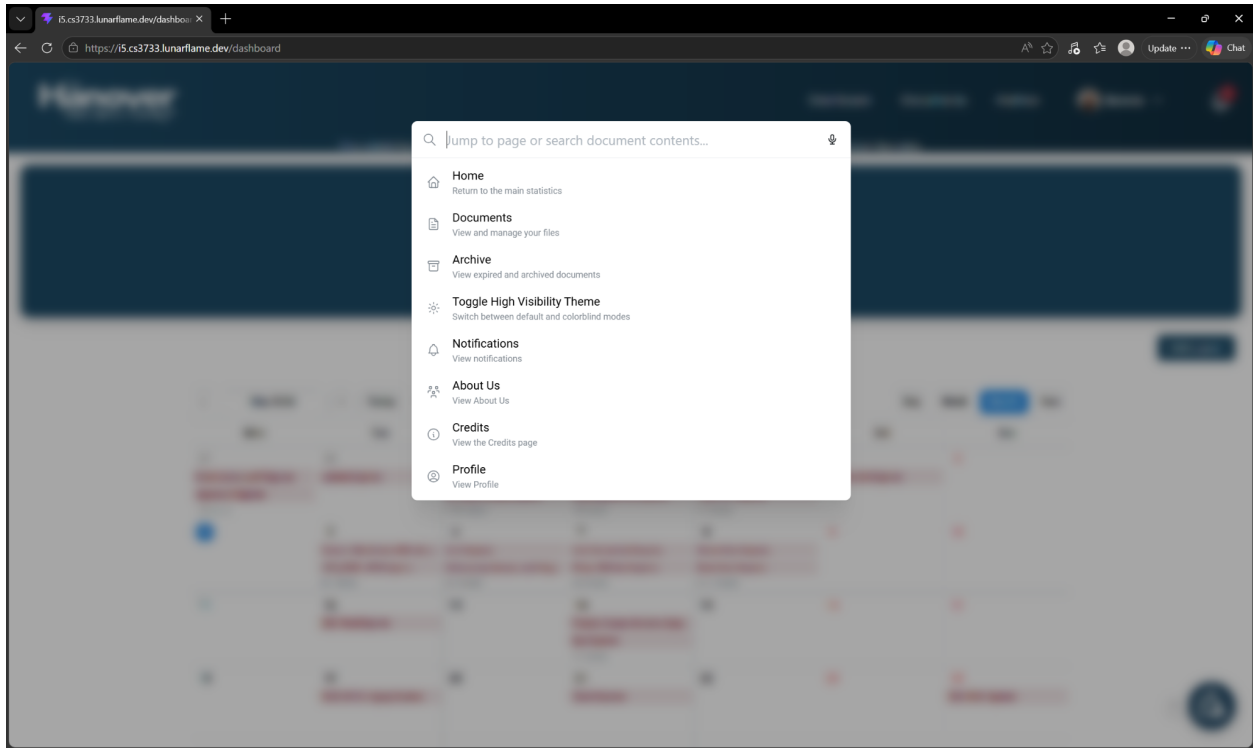
Sometimes it is faster to just speak. The Hanover AI Assistant features built-in voice recognition so you can execute commands hands-free. Simply click the Microphone Icon located in the chat input bar. Once it indicates it is listening, speak your question or command clearly. The system will transcribe your speech into text and instantly submit it to the Assistant. (Note: Voice input requires a supported browser like Chrome or Edge).

The screenshot shows a web browser window displaying a dashboard for 'The Hanover Insurance Group'. The main content area features a large 'Welcome, Berenis' message and a calendar for May 2026. A chat window titled 'Hanover AI Assistant' is open on the right side of the screen. The chat window displays a welcome message and several quick action buttons: 'My Documents', 'Portal Summary', 'Expiring Soon', and 'Checked Out'. At the bottom of the chat window, there is a 'Show me a list of Underwriter documents.' button and a 'Stop listening' button. The browser's address bar shows the URL 'https://i5.cs3733.lunarflame.dev/dashboard'.

Mon	Tue	Wed	Thu	Fri	Sat
27 Error Lookup.pdf Expires tagtestv2 Expires +2 more	28 wpledu Expires	29 cnmadness Expires IPS New BA.pdf Expires +15 more	30 CMC Manual Expires washingtonPost Expires +8 more	1 Skyline11 Expires Test PDF Expires +1 more	2 things to do Expires
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11	12 EXL Final Expires	13	14 Project Scope AA.docx Expl... Bye Expires +1 more	15	16
18	19 MJB_8510_1.jpeg Expires	20	21 Slack Expires	22	23

# Navigation Bar

**Search anything, navigate anywhere.** That is the core philosophy behind the Hanover Navigation Bar. Instead of clicking through endless menus or folders, you can access every page, setting, and document in the entire portal from one unified search bar.

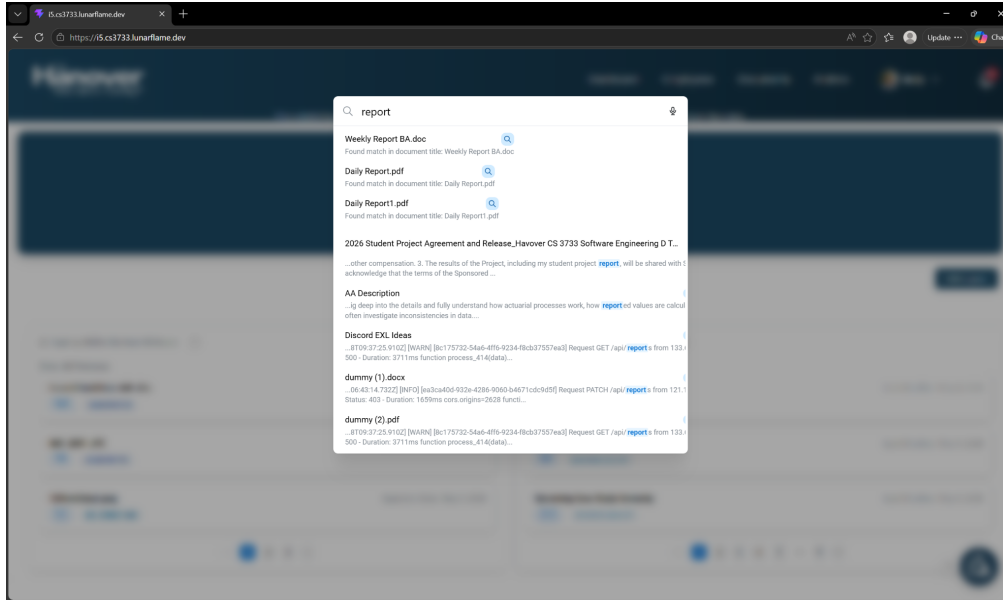


**How to Open It:** No matter where you are in the portal, simply press one of the following shortcuts on your keyboard to instantly bring up the Navigation Bar:

- **CTRL + K**
- **CTRL + P**
- **/ (Forward Slash)**

## Core Capabilities

- **Instant Navigation:** Type the name of any page, pop-up, or dashboard to jump there instantly.
- **Deep Document Search:** Don't just search for a document's title, search *inside* the documents. The Navigation Bar scans the actual text of PDFs, Word files, websites, and even transcribed videos to find exactly what you are looking for.
- **Quick System Actions:** Execute system functions directly from the search bar, such as editing your profile, adjusting your user settings, or logging out.



**Admin Functions & System Reindexing** (Note: Some system actions are restricted to Administrator accounts) Because the search engine and AI Assistant rely on a deeply integrated database, the system needs to stay synchronized with the latest company files.

- **What is Reindexing?** When new files or complex media (like MP4 videos or MP3 audio) are added to the system, the server needs to "read" and transcribe them.
- **How to Trigger It:** Administrators can use the Navigation Bar to run the **Reindex** command. This forces the backend server to scan the database, transcribe any new media files using a local AI Whisper server (or you can configure the script to use an OpenAI API key if you don't want to set up a local server), and update the search index so the new content is instantly discoverable by all users.

