# Digital Portal (Document Vault) — Mission & Boundaries

*(Example “one-pager” you can drop into your platform charter. Facts tied to public SideDrawer and BCG sources.)*

## Mission

Stand up a **shared, bank-wide digital portal**—powered by SideDrawer—that any line of business (LOB) can consume to **securely request, ingest, classify, store, and share** client documents and sensitive artifacts with **immutable auditability**, **policy-as-code** controls, and **enterprise integrations**. Run it as a **platform-as-a-product** to eliminate duplicate tooling, accelerate delivery, and concentrate scarce talent where it has leverage. This mirrors BCG’s Platform Operating Model (POM): shared platforms deliver reusable capabilities consumed across BUs to create value **faster, cheaper, and at scale** while building **agility and resilience**.

## What the Portal Provides (Scope)

### Core capabilities

* **API-first digital vault** for secure collaboration and document lifecycle (create/read/update, permissions, versioning, retention, export). SideDrawer exposes a public developer portal and API reference with standard HTTP semantics.
* **Enterprise-grade security & compliance**: configurable **retention**, **audit trails**, and **compliant storage** to streamline audits and records obligations. SideDrawer publicly highlights auditability and retention controls.
* **Events & webhooks** for integration (e.g., document uploaded/updated/shared), including **HMAC integrity headers** and retry logic to harden downstream processing.
* **Reusable UX primitives** (portal widgets/components) for upload, request, and secure share experiences; bank teams can compose these in web/mobile channels while SideDrawer remains the content and policy backbone. (Developer-friendly positioning; integrations page.)

### Integrations (out-of-the-box or supported)

* **e-Signature & productivity**: DocuSign, Acrobat Sign;
* **Storage/ECM**: Google Drive, OneDrive, SharePoint, Dropbox; **ECM connectors/on-prem** for enterprises;
* **Wealth/CRM**: Addepar, Salesforce (contact SideDrawer), plus Zapier ecosystem.

### Security attestations (baseline)

* SideDrawer publicly reports **SOC 2 Type I and Type II** completion (report available to clients on request). Treat this as a bar to build on (e.g., SOC 2 Type II target, bank controls overlay).

### Proven enterprise adoption signal

* TD announced a partnership to integrate SideDrawer as part of its innovation ecosystem (bank-grade file/data sharing). Use as external proof point when socializing the platform internally.

## What the Portal Does Not Provide Out of the Box

* **LOB-specific workflows/journeys** (e.g., mortgage underwriting orchestration, advisor KYC refresh flows). Those remain **consumer (LOB) responsibilities** built using the portal APIs/widgets.
* **Policy decisions** (retention schedules by product/region, legal holds, data residency choices). The platform **enforces** policy; Risk/Records/Privacy **define** it.
* **Other systems of record** (CRM, LOS, core banking). The portal integrates via APIs/events; it does not replace them.

## Consumers & Interaction Model

* **Primary consumers**: Stream-aligned product teams in Wealth, Retail, Commercial, Operations, and Shared Services (Tax/Legal/Records).
* **How they consume**:
  + **APIs/SDKs** to embed vault functions in apps/portals;
  + **Widgets/components** for rapid UI assembly;
  + **Events/webhooks** to trigger workflows in CRM/Case Mgmt/ESB;
  + **Reference app & Postman collections** to accelerate onboarding. (Design for self-service; “developer-friendly” is a SideDrawer commitment.)

## Non-Functional Expectations (publish as initial SLOs)

* **Availability** ≥ 99.9% (quarterly); **p95 API latency** targets per endpoint; **Webhook delivery success** ≥ agreed threshold with retries/DLQ pattern. Govern trade-offs using **SLOs + error budgets** (Google SRE model).
* **Zero-Trust alignment** for authN/Z, data plane, and device posture (anchor discussions on NIST SP 800-207).
* **Observability**: consumer-visible dashboards for SLOs, audit & access logs, event metrics.

## Boundaries & Decision Rights (tie to POM goals)

* **Centralized (Platform)**: APIs/widgets/events, tenancy & isolation, encryption patterns, audit/retention enforcement hooks, observability, versioning/deprecation windows, incident comms. (Drives **agility** via reuse, **resilience** via uniform controls, **talent leverage** by concentrating scarce skills.)
* **Federated (LOB extensions)**: journey-specific orchestration, entitlements mapping, UI variations, and data capture nuances. (Allows customization at the edge while the platform scales common primitives.)

## Interfaces & Change Management

* **Versioning & deprecation**: semantic versioning; ≥ **12–18-month** deprecation windows for breaking changes; migration guides and change calendar in advance of releases (POM governance norm).
* **Data portability/exit**: defined export formats & tested runbooks; annual “zero-data” verification if the service is decommissioned or tenancy is exited. (Also aligns to bank third-party risk expectations.)

## Initial Success Measures (first 2–3 quarters)

* **Adoption**: # of LOBs live; # of journeys on golden path; dev lead-time from intake → first API call.
* **Experience**: cycle-time to complete doc requests; first-time-right rate; advisor/ops time saved.
* **Reliability/Trust**: SLO attainment; webhook success; audit issues closed.
* **Economics**: avoided duplicate tools; % reuse of widgets/flows; platform unit costs trending down.