

## Scope of Work: AI Agent for Weekly Box Folder Document Summaries

### Objective:

Develop an AI-powered assistant that connects to a specific Box folder, analyzes documents weekly, and sends a concise email summary that includes:

- A list of all documents currently in the folder
- Highlights of updated documents with a short description of what changed
- AI suggestions for a consistent document numbering/naming system based on content

### Key Requirements

#### 1. Access to Box Folder

- Establish secure access to a specified Box folder using the Box API.
- Authenticate using server-to-server (JWT) configuration.
- Read folder contents, including file names, types, and timestamps (created/modified).

#### 2. Understand Document Content (Subject-Level Analysis)

- Open and read each file's actual content (not just file name or format).
- Identify each document's subject or purpose, such as:
  - \* Contracts
  - \* Internal policies
  - \* Reports
  - \* Meeting notes
  - \* Technical specs

### Example output:

- "Contract for Project X - outlines payment terms and delivery milestones."

- "Procurement Policy - defines supplier qualification criteria."
- The agent must be able to summarize the subject matter of each document intelligently.

### 3. Detect and Describe Updates

- Detect which documents were modified during the week.
- Compare the new content to the prior version.
- Generate a 1-2 line summary of what changed (content-focused, not technical metadata).

Example:

- "Contract\_Project\_X.docx updated - clause on late delivery was revised."
- "Q2\_Report.pdf updated - added revenue data for May."

### 4. Weekly Summary Email

- Send an email every week (e.g., every Sunday at 8 AM) to your designated address with:
  - \* List of all documents in the folder (title + purpose)
  - \* List of recently updated documents with a short description of the update
  - \* AI-generated suggestions for organizing or numbering documents logically
- The email must be well-formatted and easy to read, ideally with bullet points or tables.

### 5. AI Suggestions for Document Numbering System

- Based on the subject of each document, suggest a structured naming or numbering convention, such as:
  - \* Policies: POL-001, POL-002
  - \* Contracts: CON-2025-001
  - \* Reports: REP-Q2-2025

- AI should group similar types of documents and explain the logic behind the recommendation.

#### Example:

- "6 documents identified as internal policies - recommend naming using format 'POL-###' to support sorting and version control."

#### Optional Add-ons

- Save a weekly summary log back into the same Box folder.
- Create a simple dashboard (optional web page) showing document activity over time.

#### Security & Privacy

- Ensure access credentials are stored securely.
- No file contents are shared externally or stored outside Box and the reporting system.
- All AI processing must be compliant with company data policies (e.g., GDPR or internal data classification rules).

#### Timeline

- Phase 1: Initial setup & test access - 1 week
- Phase 2: Core features (access, reading, summary email) - 2 weeks
- Phase 3: AI analysis & naming suggestion logic - 1-2 weeks
- Go-live with weekly summary: ~Week 4-5

#### Summary Recipient

- Email reports to: [Insert your email]
- Optional CC list: [Add names if needed]