

Medykeep — New Module Specification

Provider Article Publishing Module (with PDF Attachment Support)

Prepared for: Medykeep Development Team

Purpose: This document defines the complete functional and technical specification for a new module that allows service providers (Advocates, CAs, CSs, CMAs) to publish articles from their own profile, with optional PDF attachments. Latest published articles appear on the homepage; the full library lives on dedicated pages.

1. Module Overview

Each verified professional (Advocate / CA / CS / CMA) gets a new **"Articles"** tab inside their profile dashboard. From there they can write and publish articles, optionally attaching a PDF (circular, judgment copy, notification, whitepaper, etc.). Published articles surface in three places:

- **Homepage** — only the latest 4–6 published articles, in a card layout (date, title, category tag).
- **/articles** — full paginated listing of all published articles, filterable by category/author.
- **/articles/[slug]** — full article page with content, author byline, and PDF download if attached.

All articles go through an **admin approval queue** before going live — this is important because Legal/Tax/Compliance content carries real liability if inaccurate or misleading.

2. User Roles & Permissions

Role	Permissions
Service Provider (CA/CMA/Advocate/CS)	Create, edit own drafts, submit for review, view own published articles, view own analytics (views/downloads)
Admin	Review pending articles, approve/reject with reason, unpublish/remove any article, view all analytics
Site Visitor (public)	Read published articles, download attached PDFs, no login required to read

3. Data Model

Table: articles

Field	Type	Notes
id	UUID / INT (PK)	Primary key
author_id	FK → professional_profiles	Links to the provider's profile
title	VARCHAR(150)	Required
slug	VARCHAR(180)	Auto-generated from title, editable, unique
category	ENUM	Legal / Tax / Compliance / Finance
tag_label	VARCHAR(60)	Optional display tag, e.g. "Corporate and M&A"
excerpt	VARCHAR(200)	Optional — auto-generated from content if blank
content	TEXT / HTML	Rich text body

cover_image_url	VARCHAR	Optional thumbnail
pdf_attachment_url	VARCHAR	Optional — signed/expiring URL to storage object
pdf_file_name	VARCHAR	Original filename shown to reader
pdf_file_size	INT (bytes)	For display, e.g. "1.2 MB"
status	ENUM	draft / pending_review / published / rejected
rejection_reason	TEXT	Nullable — shown to author if rejected
published_at	TIMESTAMP	Set when admin approves
views	INT	Incremented on article page view
downloads_count	INT	Incremented on PDF download
created_at / updated_at	TIMESTAMP	Standard audit fields

4. "Write Article" Form — Field Specification

Field	Type	Required	Notes
Title	Text input	Yes	Max 150 characters
Category	Dropdown	Yes	Legal / Tax / Compliance / Finance
Tag label	Text / dropdown	No	Shown on homepage/listing card
Cover image	Image upload	No	JPG/PNG, used as card thumbnail
Content	Rich text editor	Yes	Headings, bold, lists, links, inline images
Attach PDF	File upload	No	See Section 5 — full rules
Excerpt	Text area	No	Auto-filled from content if left blank

5. PDF Upload — Rules & Handling

5.1 Upload Constraints

- Accepted file type: **.pdf only** — validate both file extension AND actual MIME type server-side (not just client-side).
- Maximum file size: **10 MB** (adjust based on storage budget).
- One PDF per article for v1 (multiple attachments can be a later enhancement).
- Run an antivirus / malware scan on every upload before it is stored, since providers are external users.

5.2 Storage

- Store files in cloud object storage (S3 / GCS / Azure Blob) — never directly on the application server.
- Save the returned storage URL in **pdf_attachment_url**; keep the original filename in **pdf_file_name** for display.
- Use a generic "PDF" icon for display — no need to render PDF pages as images/thumbnails.

5.3 Where It Appears

- Shown ONLY on the full article detail page (**/articles/[slug]**) as a distinct "Download Attachment" block.
- NOT shown on homepage cards or listing cards — keeps those clean and consistent with the card design.

5.4 Security

- Serve downloads via a **signed / expiring URL** — never a permanent public link — to prevent hot-linking or bulk scraping.
- Track **downloads_count** for basic engagement analytics.
- On rejection or deletion, soft-delete the file first (retain for 30–90 days for audit trail) rather than immediate hard delete.

6. Publishing Workflow

Step 1 — Provider creates article: Provider logs in → Profile → "Articles" tab → "Write Article" → fills form (Section 4) → optionally attaches PDF → Submits.

Step 2 — Status set to Pending: On submit, status = pending_review. Article is NOT visible publicly yet.

Step 3 — Admin review: Article appears in Admin → "Article Approvals" queue with a content preview and a PDF preview link (admin must be able to open/verify the attached PDF before approving).

Step 4 — Approve / Reject:

- **Approve** → status = published, published_at = now(), article instantly eligible for homepage "latest" section and /articles listing.
- **Reject** → status = rejected, rejection_reason required, visible to the provider with the reason.

Step 5 — Post-publish edits: If a provider edits a published article, status reverts to pending_review and requires re-approval before the changes go live. The previously published version remains visible until the new edit is approved.

7. Homepage Section — Design Spec

Reference style: dark navy background, gold accent divider/dot, serif section title, clean card grid, gold tab-toggle buttons at the bottom (as reviewed with the client).

- **Section title:** "Insights" or "Expert Updates" — bold serif/caps with a gold divider line and center dot.
- **Tab toggle (optional):** Category filters, e.g. "Legal Updates" / "Tax & Finance" / "Compliance".
- **Cards shown:** Latest 4–6 published articles only, most recent first.
- **Card contents:** Date (small, muted) → Title (bold, truncated at 2–3 lines) → Category tag with icon.
- **No author photo or PDF indicator** on homepage cards — keep the section clean; full details live on the article page.
- **Fixed card height** with title line-clamp so all cards stay visually aligned regardless of title length.

8. /articles Listing Page

- Full paginated grid using the same card design as the homepage.
- Filters: Category (Legal/Tax/Compliance/Finance) and Author.
- Sort: newest first by default.

9. /articles/[slug] — Detail Page Layout

Section	Content
Header	Category tag + published date
Title	Large heading
Byline	Author photo, name, credentials — links to their public profile
Body	Full rich-text content
Attachment block	"Attached Document" — filename, file size, Download button (only if PDF present)
Disclaimer	"This article is for informational purposes only and does not constitute professional legal/tax/financial advice."

Related articles	Same category or same author, 3–4 cards
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10. Provider Profile — Additions

- New **"Articles"** tab in the provider's own dashboard listing all their articles with status badges (Draft / Pending / Published / Rejected), a PDF icon if attached, and view/download counts once published.
- New **"Articles by this expert"** section on the provider's public-facing profile page — lists all their published articles (trust + SEO booster).
- Optional: show "X Articles Published" as a stat on the expert's profile/listing card alongside rating and years of experience.

11. Admin Panel — Additions

- New **"Article Approvals"** section: list of pending articles with content preview, PDF preview/verify link, and Approve / Reject / Request-Edit actions (rejection reason required).
- Ability to unpublish or remove any live article.
- Basic analytics view: views and downloads per article, per author.

12. Non-Functional Requirements

- **Moderation-first:** No article or PDF goes live without admin approval, given legal/medical/financial liability.
- **File validation:** Server-side MIME + extension check, malware scan, 10 MB size cap on PDFs.
- **Signed URLs:** All PDF downloads served via expiring signed URLs, not permanent public links.
- **Auditability:** Soft-delete files/articles with a retention window (30–90 days) before permanent removal.
- **SEO:** Clean slugs, meta title/description per article, server-rendered content where possible.

13. Build Summary (Quick Checklist for Dev Team)

Component	Description
DB	New `articles` table (see Section 3)
Provider dashboard	New "Articles" tab — write, edit, view status, view own analytics
Admin panel	New "Article Approvals" queue — approve/reject with PDF preview
File upload	PDF upload with type/size/malware validation → cloud storage → signed URL
Homepage	New "Insights" section — latest 4–6 published articles, card design per Section 7
Public pages	/articles (listing), /articles/[slug] (detail with PDF download block)
Profile page	"Articles by this expert" section on each provider's public profile