Yelena's Chat Threads feature list. May 3, 2024.

Intro to Chat Threads:

1. User is introduced to Chat Threads, by the "Conversation History" side drawer being expanded by default. Like ChatGPT and others. The side drawer can collapse.

2. Threads are named with default names Chat #1, 2, 3 etc. Major LLMs infer names from chat context. Our engineering team cannot do that, or at least not for MVP. User can rename Threads manually.

3. Thread hover and selected states are the same. Like ChatGPT. No need for overdesigning.

4. Thread "remembers" Entitlement selection. Switching Threads thus, changes Entitlement selection.

5. Chat Thread is created when user starts to chat. User types up the prompt, prompt appears in the chat exchange section. Response appears. Then Chat Thread appears. This timing logic does not have to followed by the Dev team. Create a Thread whenever you like. It's just a suggestion, in case a Dev wants that definition.

6. When creating a new chat, the Chat Thread captures current Entitlement selection.

7. Changing Entitlement selection: When user is in a Thread, and they change Entitlement selection , then whatever the LAST Entitlements were selected, that is what that thread will "remember":

    - All changes in a Chat Thread will be remembered, until user clicks "New Chat".

    - The blue notification messages, about Entitlements being added or removed from the chat, happen only if user changes Entitlement selection in a Thread.

    - The blue notification messages do not happen when user switches Threads. Because not only does the Entitlement selection change, but the chat messages (prompts and responses) change as well. And it happens in front of users eyes, providing enough affordance, to not warrant further notifications. In other words, it's a jarring enough change, that UX feels like notification is not warranted.

8. "New Chat" CTA in top of "Conversation History" panel, is the only way now, to get out of a Thread.

9. When a user selects a thread, the Entitlement selection happens automatically.

Chat Threads features:

10. "Hide unselected" Entitlements toggle in the "Select Entitlements" side panel:

    • Show if there's maybe a selected Entitlement below the fold

    • Reduce visual noise

11. "Selected" label in the "Select Entitlements" side panel. "Selected" label also helps to show if there are selected Entitlements under the fold. Especially now, that we introduced the big buttons on the bottom of the panel. They leave less space to show the Entitlements.

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12. Timeframes confirmed by Louise: Today, This week, Past 30 days, Past 60 days, Past 90 days, Past 6 months – as CWYD has only been available to users for about 5 months. As we get closer to 2025, we can start offering a folder called “2024”.

13. Names cap at character limit of 164. Long names wrap in 2 lines, like Entitlements. Then, if there is still leftover text, it truncates with the ellipsis, and show rest of the name on hover, in a tooltip.

14. Thread-based actions are “Delete” and “Rename”. “Rename” works by clicking on the name. Like Jira ticket. “Delete” is a trash can that shows in selected and hover states.

15. Sejal’s suggestion: use this opportunity to move “Clear chat” from lower right, to upper right corner.

    • Because Sergio wanted it.

    • Because we need the real-estate for the newly created “Conversation History” panel.

    • Because we want that area to later add “Download chat” as well.

    • We can use upper left, to show the name of the selected thread. This would be handy, when the “Convo History” side drawer is collapsed. Just to explain: when the side drawer is expanded, the Thread name would repeat. That’s OK.

Edge cases:

16. If user selects a Chat Thread, but then deselects manually Ents in it, they get the same message as they do without Threads: “Please select Ents to chat with”.

17. Yelena brought this up in the kickoff, on April 16. Isabel asked about this same edge case in a follow-up meeting (Isabel, Sejal, Yelena) on May 6 again. So lets mark this as a potential day #2 feature

    Recognition of existing Threads triggers relevant warning message to the user, and ability to go to that Thread:

    Scenario: user clicks “New chat”, but then manually selects a combination of Entitlements, that they already have in a Thread. They get a warning message “You already have a chat thread with this combination of Entitlements. Would you like to go to it now? CTAs: “Yes, take me there” and “No, I’ll start fresh”.” Product and Dev, please confirm.

    FYI, Yelena’s note to self: Second meeting was April 24.

    On May 9, in a meeting with Trevor and Louise, Louise asked this same question, about this scenario.

18. Add a way to navigate through many Threads: either a scrollbar, or some sort of navigation, but this can be done later when users have lots of Threads.

19. Sejal’s idea on timestamps. She suggested it today, May 6. I showed UI for timestamps, from CWYD Day #2 wireframe. Couple of notes:

    - As of this moment, timestamp is not a requirement. Louise would have to confirm she wants it.

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- Timestamp on Entitlement tiles in CWYD, were introduced back in December 2023. But they never seemed to have garnered any interest.
- No users asked for it.
- Major LLMs do not have it.
- ChatDoc and/or ChatGPt have it.

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