Copilot Entitlement MVP features list

“Entitlements” main nav item. Sub-nav: “Create Entitlement” form, “Manage Entitlements” table, and “Manage Documents” table.

“Create Entitlement” form:

Entitlement creation and selection:

• Textual instruction to user about what Copilot Entitlements are, why we need them, and how they can be used. And how they can be changed in the future, if needed.

• Ability to select an existing Entitlement, or create a new one.

• Search field for Entitlements, inside the dropdown menu.

• Entitlement description field, in addition to the name, to prevent users from describing the Entitlement in the name, and thus making names too long for successful search.

• Entitlement naming guidelines and character limit of 64.

Data Ingestion:

• Ability to browse or drag-and-drop documents and files into an Entitlement.

• Search field for documents; explicit, not in a dropdown or behind another click.

• Information on non-acceptable special characters, character name limit of 64, and file size up to 50MB.

• Error message for unacceptable character names.

• MVP allows file formats PDF, TXT and HTML. Day #2 will allow XLSX and CSV.

• Messaging to user on how uploading and processing works, how long it takes, and where their documents go, after uploading, and where to look for them.

• Number of documents in the Entitlement badge.

• Ability to delete individual documents.

• Error message for unacceptable file formats.

• Error message if user tries to upload a document, without selecting an Entitlement first. “Browse documents” button is also disabled, prior to Entitlement selection.

Adding users to an Entitlement:

• Add Azure Active Directory Groups to Entitlement.
User has to know the exact AD Group name. We cannot surface AD Group names here. Thus, we cannot provide a search with type-ahead, dropdown with pre-populated options, for Legal & Compliance reasons.

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• Textual instructions to the user, on how the input field works – that they have to know the exact name.

• Informational message to the user that if their AD Group does not exist, they can go to Service now, create a ticket, requesting an AD Group be created. The Service Now is a hyperlink to SNOW.

• Ability to add individual users to the Entitlement. Search and select field, with type-ahead.

• Informational message to the user that if they cannot find their user in the Copilot system, their user can go to Copilot login page, and log in for the first time. Login in will make that user "appear" in the Copilot system, and become visible in the search. The login page is a hyperlink to the Copilot Web UI.

• The initial type-ahead is small, but it may to the job. Option for user to "See all results", which brings out a modal pop-out window, with about 8 users total, depending on the size of the screen and browser window.

• This modal contains a search field, and is multi-select. It's showing total number of potential name matches.

• Populated individual user field, shows lozenges with people's names. Plus the total number of additional selected people. The number is a hyperlink, that expands a box to show all selected people.

• Clicking "Save Entitlement" brings user to the "Manage Entitlements" table.

"Manage Entitlements" table:

• Search field for Entitlements.

• Introduction of Ownership statuses: Owner and Member. Owner created an Entitlement. Member is a person to whom the owner gave access to the Entitlement, in the "Add users" section of the "Create Entitlements" form.

• Grid with the following columns:

1. Entitlement name *(required)*
2. Ownership Status *(required)*
3. Documents in this Entitlements *(optional)*
4. Number of Documents *(optional)*
5. Users *(optional)*
6. AD Groups *(optional)*
7. Number of Users *(optional)*
8. Use cases in this Entitlement *(optional)*
9. Number of use cases *(optional)*

• Ability to edit Entitlements. User can edit Entitlements they are an Owner of. They click on the pencil edit icon, at the end of the row.

• Clicking on the pencil icon, brings the user to the form, where they can edit. It's the form page, in the Entitlements main nav item, and "Create Entitlement" sub-navigation item.

• Pagination is available, if table becomes too long for one page. We can fit 10 or so rows, above the fold.

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“Manage Documents” table:

• Search field for documents.

• Introduction of Document statuses: Queued, Processing, Processed and Failed to process.

• Error message for the encrypted files: explanation to the user that Copilot is unable to extract data from encrypted files, and to upload an un-encrypted version. Full error message appears when user clicks “Learn more” link in the status.

• Grid with the following columns:

- Document name *(required)*
- Status *(required)*
- Entitlements the Document is a part of *(optional)*
- Users and AD Groups *(optional)*
- Just number of users with access to the Document *(optional)*

• Ability to delete a document.

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