Whole Document Analysis, Feature list, July 23-24, 2024

Please note that all this text is in the Figma too. I just aggregate it in a Word doc as well, to ease the creation of Jira tickets.

Dashboard, WDA landing page, and how users can differentiate from CWYD:

1. **New tile on the dashboard.** Skill is called “Whole Document Analysis”. Category is “File to text”. Description is in Figma but also pasted here: “Analyze documents holistically. Compare two similar documents, and receive a list of differences. Or, use documents you upload, of previously written samples, to extract writing style and tone and create a new draft, with new topic.”

   • Donna approved this description text.

   • Icon I supplied to Dan on July 24.

2. **Landing page, for when user has no Entitlements.** Much like we did for CWYD and BYOA. With a link to “Add documents”. There will just be more text on it, and no illustration.

   • We are adding text to this page, to explain: what the skill does, how it works, and how best to use it.

   • User will be able to come back to this page, by clicking the skill’s name in the main navigation.

3. **WDA skill name in the main navigation.** Two purposes:

   • WDA will look identical to CWYD for a while. CWYD is the only skill where we don’t mention skill’s name anywhere inside the skill. So now will, so users can differentiate CWYD from WDA.

   • This link also serves to bring the user back to the landing page, where we explain about WDA.

4. **CWYD skill name in the main navigation. In CWYD skill please.** So whichever skill user goes to, they see the an explanation about how skills are different: chunked vs whole document ingestion, and what type of ingestion is good for what types of needs: Q&A vs File-to-text. *Product may tweak copy.*

   Please note that in CWYD, this page already exists. This is not a new component for Developers to add. It just has a big illustration and little text. We are now removing the illustration, and adding some text.

Entitlements form:

5. **Update text in “Upload Documents” section, to account for WDA:** “Supported file formats for “Chat with your data” and “Whole Document Analysis” are .pdf, docx and pptx. Additional supported file

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formats for just “Chat with your data” are: .mp3, .mp4, .m4a, .png, .jpg, .jpeg, .gif, .bmp, .webp, .txt, and .html. Max file size is 500MB for .pdf, .docx and .pptx files and 1GB for other file types.”

6. **“Tags” feature is introduced, on the “Create Entitlement” form.**

   • “Tags” button appears after user’s added documents.

   • “Tags” button launches a dialog box. It’s a modal window, so it blocks application, before it is dismissed. Tags enables users to tag documents. The reason the dialog is so wide, is to accommodate for max # of tags, which is 5, plus long Document names (255 character max).

7. **Tags’ features:**

   • Tags are for improved searching and filtering, as per Han.

   • 5 tags max. should be enough for the MVP.

   • No built-in tags. User can type whatever they want as a tag.

   • Tags cannot be edited, after Entitlement’s been saved, in MVP.

8. **Adding tags behavior:**

   - User has to select at least 1 document, to be able to access tagging.
   - ERROR behavior: if user does not select documents, and tries to click on the tagging box, the pop-out header “Select Docs...” becomes red.
   - Because tags are only and fully custom, user can type anything. There is no way for us to know when user is finished typing their tag name. Thus, when user:
     - Clicks on the PLUS sign, we know they are finished typing a tag. Text converts into a tag UI (these pills, lozenges type of appearance).
     - Or, user can enter more than one tag at once, just separate them with commas. When they click the plus icon, all text convers to tags UI.
   - When user is finished adding tags to various documents, they click “Add tags to documents”. At that point, the tags should appear next to Document names, in the document list, above the tags section. If this takes a second, we may show a spinner.
   - “X” on the tag is remove the tag.

9. **Removing tags:**

Removing tags <u>from the dialog</u> popout before Entitlement’s been saved:

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- In the tags box, user clicks on the “X” on the tag.

Removing tags from the document list, inline, inside of the dialog popout:

- When tags are added to documents, they appear next to the document name.
- If user wants to remove tags, at this stage, they can:
  - Click “Cancel” which closes the dialog.
  - Deselect document/s. This removes tags too.

Removing or editing tags from the Entitlements form, before Entitlement’s been saved:

- If user wants to edit tags, at this stage, they click the “Tags” button, to bring back the dialog.
- After the Entitlement is saved, tags can no longer be edited, in the MVP at least.
- User can also delete a document from this page, if they wish. That functionality already exists.

Entitlements tables:

“Manage Entitlements” table:

10. **Change the width of the Document list popout**, to accommodate for potential 5 tags. Recommended width is 1300 pixels, or Developers can use percentages as they see fit.
    - Out of that new width, 2/3 is for the Document name. 1/3 for tags. See Figma.
    - Both entities wrap in case of an overflow.

“Manage Documents” table:

11. **Update the skill column content.** “Skill” column already exists and it lists “ask-my-data” in all rows. Change to add “whole-document-analysis” where appropriate.
12. **Add “Tags” column.** Potential overflow appears in an inline overlay. See Figma. Please note this is the same treatment that already exists for the error “Learn more” scenario.
13. **Add tooltip on the skill column** to explain that Entitlements containing any combination of PDF, Word and PPT documents appear in both CWYd and WDA skills. And Entitlements containing any combination video, image and code types of files, appear only in CWYD.

WDA skill UI. It’s identical to CWYD, with just 3 additions:

This is not a new Jira. Just a reminder to add WDA skill name in the main navigation and it’s clickable to bring the user back to the landing page.

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14. **Entitlements side panel: Add an ability to expand the list of documents.** Display document file format, document name, and tags, if any.
    • User should be able to click into a document name, and copy and paste into their prompt.
    • Louise mentioned preference for drag-and-drop functionality, but it is not confirmed if this is possible.
15. **Entitlements side panel: background color is gray**, so users can differentiate from CWYD.

This is not a new Jira. WDA also has a system prompt like CWYD. All appearance and functionality is the same.

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