Platform User Stories

Platform User Stories

This page documents user stories for the OneSuite platform, organized by user journey.

51 user stories across 8 sections

Access & Onboarding

PM to add Epic links here that cover the below user stories and mark ID with ✅ if covered in Epics

OAI-176 Authentication & Multi-tenancy Foundation

OAI-504 Onboarding Framework

ID	User Story	Acceptance Criteria
US-001 ✅	**As a** new user, **I want to** create an account quickly **so that** I can start using the platform without friction	• Given I'm new, when I sign up with email, then I can start immediately • Given I make a typo in my password, when I try again, then the error is clear
US-002 ✅	**As a** returning user, **I want to** stay logged in **so that** I don't have to re-authenticate every session	• Given I logged in yesterday, when I return today, then I'm still authenticated • Given I've been idle, when I return within the timeout, then my session is still valid • Given I want to log out, when I click logout, then my session ends securely
US-003 ✅	**As a** Publicis employee, **I want to** log in with my corporate credentials **so that** I don't need to	• Given I'm on the login page, when I click "Login with Lion", then I'm redirected to Publicis SSO • Given I authenticate successfully, when redirected back, then I'm logged

	remember another password	into OneSuite • Given authentication fails, when I'm redirected back, then I see a clear error message
US-004	**As a** manager, **I want to** only see my assigned clients **so that** I can focus on my work without distraction	• Given I manage Client A and B, when I log in, then I only see those clients • The project list must show only projects associated with the selected client. Projects belonging to other clients must not appear regardless of user permissions.
US-005	**[Future] As a** Super Admin, **I want to** see all clients **so that** I can manage the platform globally	• Given I'm a super admin, when I log in, then I see all clients • Given I need to help a specific client, when I navigate to them, then I have full access • Given I need to manage users, when I access admin settings, then I can assign client permissions
US-006	**[Future] As a** Super Admin, **I want to** create a new client **so that** the client has an isolated environment for their data and users	• Given I have Super Admin access, when I create a new client detail, then an isolated client is created • Given a client is created, when I view it, then it has a unique identifier following naming conventions • Given a client exists, when I need to assign admins, then I can immediately assign Admins to it

US-007	**[Future] As a** Super Admin, **I want to** assign users to clients with specific roles **so that** they have appropriate access levels	• Given a client exists, when I assign a user with a role, then the user can access only that client • Given a user is assigned as Admin, when they log in, then they have admin permissions for that client • Given a user is assigned as User, when they log in, then they have standard permissions only
US-008	**[Future] As a** Super Admin, **I want to** upload client onboarding documents (KPIs, taxonomy, competitors) **so that** the AI agent has client-specific context	• Given I have client-specific documents, when I upload them, then the system validates required fields • Given documents are uploaded successfully, when a user asks about KPIs, then the agent references client-specific targets • Given invalid data is uploaded, when validation fails, then I see clear error messages
US-009	**[Future] As a** Super Admin, **I want to** connect client platform accounts (Google Ads, Meta, Amazon, etc.) **so that** performance data can be ingested	• Given I have client platform credentials, when I initiate connection, then I can authorize via OAuth • Given a platform is connected, when authorization completes, then data ingestion begins automatically • Given a connection fails, when I view status, then I see the specific error and can retry
US-010	**[Future] As a** Super Admin, **I want to** see onboarding completion status **so that** I know when a client is ready for users	• Given a client is being set up, when I view its status, then I see which steps are complete vs incomplete • Given all required steps are done, when I view status, then it shows "Ready" • Given required steps are missing, when I view status, then it shows

		"Incomplete" with specific items needed

Workspace Management

OAI-177 General UI/UX

OAI-178 Client_id & Project Management

OAI-1145 UI Chat Interface

ID	User Story	Acceptance Criteria

US-011	**As a** user, **I want to** create a project workspace **so that** I can organize my conversations by client or campaign	• Given I need to organize my work, when I click "New Project", then I see a creation form
		• Given I open the “New Project” creation form, when the form loads, then I see the following fields:
		  ◦ Name (required, maximum 500 characters)
		  ◦ Description (optional, maximum 500 characters)
		  ◦ Color Picker (select from a predefined palette)
		• Given I am entering a project name, when I type into the Name field, then the system must:
		  ◦ Reject empty or whitespace-only values
		  ◦ Enforce a maximum length of 500 characters
		  ◦ Display a character counter that updates dynamically
		• Given I already have other projects, when I attempt to submit the form, then the system must prevent submission if another project

		with the same name exists for my user and must display a clear error message • Given I fill in project details, when I submit, then the project appears in my projects page • Given a project is created, when I open it, then I can start conversations scoped to it • Given I manage multiple clients, when I create separate projects, then my conversations stay organized and separated by client
US-012 ✅	**As a** user, **I want to** edit or rename my projects **so that** I can keep them organized as work evolves	• Given a project exists, when I access its menu, then I can edit name, description, or color • Given I make changes, when I save, then updates are reflected immediately
US-013 ✅	**As a** user, **I want to** delete projects I no longer need **so that** my workspace stays clean	• Given I want to remove a project, when I select delete, then I see a confirmation dialog • Given I confirm deletion, when complete, then the project and all its content is removed

Conversation Experience

OAI-177 General UI/UX

OAI-1145 UI Chat Interface

OAI-802 Chat Interface & Streaming

OAI-805 MCP Tool Calling

OAI-804 Agent Core Runtime

OAI-893 Core Orchestration - Agent Session Management & Invocation Coordination

[OAI-894](OAI-894) Master & Tailored Config Management

[OAI-907](OAI-907) Agent Tools (Native Tools)

ID	User Story	Acceptance Criteria
US-014 ✅	**As a** marketer, **I want to** ask questions in plain English **so that** I can get insights without writing SQL or switching between tools	• Given I type a question, when I submit it, then I receive a relevant answer • Given I ask about campaign performance, when the agent responds, then it includes specific metrics • Given I'm waiting for a response, when it's processing, then I see immediate feedback
US-015 ✅	**As a** marketer, **I want to** get AI answers informed by the Brand KB **so that** responses include client-specific context and best practices	• Given I ask about best practices, when the agent responds, then it cites Brand KB documentation • Given there's a client protocol, when relevant, then the agent follows it • Given I need to verify, when I ask for sources, then links are provided
US-016 ✅	**As a** marketer, **I want to** get relevant answers for my specific channel **so that** I don't have to filter through irrelevant information	• Given I work on Google Ads, when I ask a question, then answers are specific to search • Given I switch to Social work, when I select that context, then answers adapt • Given platform-specific terminology, when used, then the agent understands it

US-017	**As a** returning user, **I want to** continue where I left off **so that** I don't have to re-explain my situation	• Given I had a conversation yesterday, when I return, then I can see it • Given I reference earlier context, when I say "like we discussed", then the agent understands • Given I want to start fresh, when I create a new chat, then previous context doesn't interfere
US-018	**As a** user, **I want to** have the agent remember our conversation context **so that** I don't have to repeat information within a session	• Given I prefer concise answers, when I state that once, then future responses are concise • Given I work on a specific account, when I mention it, then subsequent questions assume that context
US-019	**As a** user who works late, **I want to** use dark mode **so that** the screen doesn't strain my eyes	• Given I prefer dark mode, when I toggle it, then the UI switches • Given I switched to dark mode, when I return later, then it's still dark
US-020	**As a** user, **I want to** start a new chat **so that** I can have a conversation with the AI agent	• Given I'm in a project, when I click "New Chat", then a new chat session is created • Given a chat is created, when I refresh the page, then my conversation persists • Given I start typing, when I send a message, then the agent responds

US-021	**As a** user, **I want to** delete chats I no longer need **so that** my workspace stays organized	• Given I want to delete a chat, when I select delete, then I see a confirmation • Given I'm in an active chat, when I try to delete it, then I'm told to switch first • Given I confirm deletion, when complete, then the chat and its content are removed

US-022	**As a** user, **I want to** attach files to my messages **so that** the AI can reference my documents	• Given I have files, when I drag them to the chat, then they upload with progress indicators
		• Given I am attaching files to a chat message, when I upload files, then the system must accept the following file types and size limits:
		  ◦ Documents: `.pdf`, `.docx`, `.txt`, `.md` up to 50MB
		  ◦ Data: `.csv`, `.xlsx`, `.jsonl` up to 50MB
		  ◦ Images: `.png`, `.jpg`, `.jpeg`, `.gif`
		• Given I have several files to upload, when I select files using drag-and-drop or the file picker, then I can upload up to 5 files per message
		• Given I upload different file types, when the upload completes, then image files show a thumbnail preview, and document/data files show a file icon + filename
		• Given files are uploaded, when I send my message, then the AI can reference their content
		• Given an upload fails, when I check status, then I see a clear error and can retry

US-023 ✅	**As a** user, **I want to** see responses stream in real-time **so that** I know the AI is working and can read as it types	• Given I send a message, when the AI responds, then I see text appear incrementally • Given streaming is in progress, when I want to stop, then I can cancel the response • Given streaming completes, when I view the response, then it's fully formatted
US-024 ✅	**As a** user, **I want to** see what tools the AI is using **so that** I understand how it's getting information	• Given the AI uses a tool, when it runs, then I see which tool is executing • Given a tool returns results, when displayed, then I can see what it found • Given a tool fails, when I view the response, then I see a clear error message

US-025 ✅	**As a** user, **I want to** select which agent to chat with **so that** I get specialized help for my channel	• Given I am starting a new chat, when I open a chat from either the homepage or a project, then an agent selection dropdown must be available in both locations:
		  ◦ Homepage “New Chat”
		  ◦ Project “New Chat”
		• Given I start a new chat, when I see the agent selector, then I can choose from available agents
		• Given I have selected an agent, when the chat session begins, then the selected agent must persist for the entire session until I explicitly change it
		• Given I select an agent, when the chat begins, then it uses that agent's specialized knowledge
		• Given I'm in a project, when I chat, then the agent also has access to project documents

		• Given I am in an active chat ,when I switch to a different agent, then a new context is created for that agent and previous chat context is not carried over
		• Given I start a chat from the homepage, when an agent is selected, then:
		  ◦ Project Knowledge Base cannot be loaded
		  ◦ No project documents or artifacts are loaded
		  ◦ The agent loads only the system default context, which includes: system prompt and toolset

US-026	**[Future] As a** user, **I want to** rename existing chats	• Given a chat exists, when I access its menu, then I can rename it • Given I make changes, when I save, then updates are reflected immediately

Agent Capabilities

OAI-804 Agent Core Runtime

OAI-907 Agent Tools

OAI-893 Core Orchestration - Agent Session Management & Invocation Coordination

OAI-894 Master & Tailored Config Management

OAI-805 MCP Tool Calling

OAI-1104 KB - Capability-Specific Content

OAI-1115 Search - KB & Agent Memory - Brand Artifacts

OAI-176 Authentication & Multi-tenancy Foundation

OAI-510 Agentic Tools

OAI-524 Agent Query Tool Capability

OAI-1096 Search - Query System Methods

Epics enabling the agent to query Google Ads, SA360, and Google Search Console data for the Search Pod MVP

[OAI-183](#) Data Lakehouse Databricks (Search Core)

[OAI-1088](#) Search Bronze to Gold Pipeline & Schema

[OAI-1427](#) Custom Ingestion - Search Data

[OAI-1745](#) Search Google Ads Bronze Ingestion

[OAI-1746](#) Search GSC Bronze Ingestion

[OAI-1747](#) Search SA360 Bronze Ingestion

[OAI-1760](#) Search Google Ads Silver Normalization

[OAI-1806](#) Search SA360 Silver Normalization

[OAI-1807](#) Search GSC Silver Normalization

ID	User Story	Acceptance Criteria
US-027 ✅	**[Future] As a** user, **I want to** enable reasoning mode for complex questions **so that** I get more thorough step-by-step analysis	• Given I have a complex question, when I enable reasoning mode, then the agent shows its thinking process • Given reasoning is enabled, when the agent responds, then I see step-by-step reasoning before the answer • Given reasoning takes longer, when enabled, then I understand the trade-off for better quality
US-028 ✅	**As a** user, **I want to** have the agent search the Brand KB **so that** responses include client-specific documentation and best practices	• Given Brand KB documents exist, when I ask about client processes, then the agent searches and cites relevant docs • Given metadata filtering is available, when I ask channel-specific questions, then results are filtered by channel • Given the agent finds KB content, when responding, then citations link to source documents
US-029 ✅	**As a** user, **I want to** have the agent use the right tools automatically **so**	• Given I ask a calculation question, when the agent responds, then it uses the calculator tool

	that I get accurate answers without specifying how	• Given I ask about a client, when the agent searches, then it uses the KB search tool • Given a tool fails, when I see the response, then graceful fallback messaging appears • Given tools are used, when viewing the response, then tool indicators show which tools were called
US-030 ✅	**As a** user, **I want to** have my data isolated by project and client **so that** I only see information relevant to my work	• Given I'm in a project, when I chat, then conversations are scoped to that project • Given multi-tenant architecture, when I access data, then I only see my client's information • Given project-level KB documents, when the agent searches, then results are filtered to my project
US-031 ✅	**As a** user, **I want to** see which tools the agent uses **so that** I understand how answers are generated	• Given the agent calls a tool, when I view the response, then I see a tool indicator • Given tool details are available, when I expand the indicator, then I see what the tool did • Given transparency builds trust, when tools are visible, then I can verify the agent's approach

Brand KB (Client-level)

OAI-1104 KB - Capability-Specific Content

OAI-1115 Search - KB & Agent Memory - Brand Artifacts

OAI-1145 UI Chat Interface

OAI-182 Bedrock Knowledge Base & RAG

OAI-2135 UI for Brand KB

ID	User Story	Acceptance Criteria
US-032 ✅	**As a** super admin, **I want to** sync Confluence content to the Brand KB **so that** the agent has access to the latest client documentation	• Given I trigger a sync, when the process completes, then Confluence content is synced to S3 with metadata • Given a sync finishes, when I check the KB, then Bedrock KB is re-indexed • Given I need to update content, when I sync manually or on schedule, then the latest docs are available • Given a sync completes, when I view status, then I see last sync time and document count
US-033 ✅	**As a super** admin, **I want to** add metadata to Brand KB content **so that** users can filter AI searches by channel, document type, or decision type	• Given I add KB-CONTEXT blocks to Confluence pages, when synced, then metadata is extracted • Given metadata exists, when I view the admin interface, then I see channel, document_type, and decision_type fields • Given the agent searches, when metadata filtering is used, then results are filtered accordingly
US-034 ✅	**As a** user, **I want to** browse the Brand KB via the sidebar **so that** I can see what documentation is available for this client	• Given I'm logged in, when I click the KB link in the sidebar, then I see the Brand KB document list • Given I view the KB, when I browse documents, then I see name, type, and last updated date • Given I find a document, when I click it, then I can view the content (read-only)
US-035 ✅	**As a** user, **I want to** have the AI cite Brand KB sources	• Given the AI uses Brand KB content, when it responds, then citations link to source documents

	so that I can verify and trust its answers	• Given a citation exists, when I view it, then relevant passages are highlighted • Given source details are available, when I check citations, then page/section references are included
US-036	**As a** Super Admin, **I want to** delete outdated or incorrect Brand KB pages from Confluence **so that** the agent no longer retrieves or uses obsolete knowledge during reasoning	• Given a Brand KB page exists in Confluence, when I delete the page or archive it, then the KB sync process must detect the deletion, and remove the page from the vector index, and remove or invalidate the stored metadata associated with that page • Given a KB page has been deleted, when the agent performs retrieval, then the deleted page must not appear in the agent's context and retrieval must not surface any content, summaries, or embeddings derived from the deleted page

Project KB (User uploads)

OAI-178 Client (id) & Project Management

OAI-1145 UI Chat Interface

OAI-802 Chat Interface & Streaming

OAI-804 Agent Core Runtime

OAI-907 Agent Tools (Native Tools)

OAI-182 Bedrock Knowledge Base & RAG

ID	User Story	Acceptance Criteria
US-037 ✅	**As a** user, **I want to** upload documents to a project's Knowledge Base **so that** I can chat with	• Given I have client documents, when I go to the project's Knowledge tab, then I can upload files • Given I am in the Project Knowledge Base upload area, when I drag files

	the AI about specific documents	over the upload zone, then the zone must visually highlight just like the chat upload zone • Given I am uploading a file to the project Knowledge Base ,when I select a file, then the system must accept the following file types: ◦ Documents: `.pdf`, `.docx`, `.txt`, `.md` ◦ Data: `.csv`, `.xlsx`, `.jsonl` ◦ Images: `.png`, `.jpg`, `.jpeg`, `.gif` • Given I upload a document, when processing completes, then the document is stored in S3 and indexed in Bedrock KB • Given an upload fails, when I check status, then I see a clear error message
US-038	**As a** user, **I want to** browse documents in my project's Knowledge Base **so that** I can see what documents I've uploaded	• Given I'm in a project, when I view the Knowledge tab, then I see a document list with name and type • Given I want details, when I click a document, then I can view details and [future] content preview • Given I'm browsing, when I view documents, then only my current project's documents appear
US-039	**As a** user, **I want to** chat with the AI about my uploaded documents **so that** I can get insights from specific files	• Given I've uploaded documents, when I ask questions in the project chat, then the agent searches my project's documents • Given results are returned, when I view them, then they are ranked by

		relevance • Given I'm chatting, when the agent responds, then it cites my uploaded documents
US-040 ✅	**As a** user, **I want to** delete project documents **so that** I can manage my uploaded files	• Given I want to remove a document, when I click delete, then it's removed from the project KB • Given a document is deleted, when the agent searches, then it's excluded from results • Given I confirm deletion, when complete, then the document is removed from S3 and Bedrock KB

Artifacts

OAI-1144 UI Artifact Management

OAI-802 Chat Interface & Streaming

OAI-804 Agent Core Runtime

OAI-178 Client_id & Project Management

ID	User Story	Acceptance Criteria
US-041 ✅	**As a** user, **I want to** view generated artifacts in a side panel **so that** I can review content without leaving the conversation	• Given an artifact is generated, when I view it, then it appears in an expandable side panel • Given an artifact is generated by the AI during a chat, when the artifact is created, then the system must automatically assign a title • Given the panel is open, when I resize it, then the panel can be resized or minimized
US-042 ✅	**As a** user, **I want to** track and restore artifact versions **so**	• Given an artifact has versions, when I view history, then all iterations are shown

	that I can recover previous iterations if needed	• **[Future]** Given I want to compare, when I select two versions, then I can view them side-by-side • **[Future]** Given I need an older version, when I select restore, then the previous version is restored
US-043	**As a** user, **I want to** download artifacts in multiple formats **so that** I can use them in other tools	• Given I want to export, when I download, then PDF, Markdown, and HTML formats are available • Given I export an artifact, when I open the file, then structure and styling are preserved
US-044	**As a** user, **I want to** save project artifacts to the project folder **so that** the agent can retrieve them in future conversations	• Given I create an artifact, when I click save to project, then it's saved with one click • Given an artifact is saved, when I ask the agent about it, then it can list and retrieve the saved artifacts • Given I view the project, when I check documents, then artifacts appear in the project document list
US-045	**As a** user, **I want to** refine generated content **so that** I can make it fit my exact needs	• Given I want AI help, when I request refinements with instructions, then the AI updates the artifact
US-046	As a user, **I want** artifacts created in chats to be stored separately from project artifacts **so that** they are not used by the agent for contextual reasoning	• Given I generate an artifact in a chat, when generated, then it must be stored in my personal artifact folder (not in any project) • Given a artifact exists, when I access the artifacts panel/folder from homepage, then I can view or download it but the agent cannot use it as context

Additional Features

[OAI-802](#) Chat Interface & Streaming

[OAI-176](#) Authentication & Multi-tenancy Foundation

[OAI-177](#) General UI/UX

[OAI-803](#) Observability, Logging & Telemetry

ID	User Story	Acceptance Criteria
US-047	**As a** user, **I want to** copy AI responses **so that** I can paste them into other tools	• Given an AI response is displayed, when I view it, then a copy button appears • Given I click copy, when the action completes, then formatted text is copied to clipboard • Given I copy content, when the action completes, then I see visual confirmation
US-048	**As a** user, **I want to** stop AI generation mid-response **so that** I can ask a different question	• Given a response is streaming, when I view it, then a stop button appears • Given I click stop or press escape, when the action completes, then generation stops immediately • Given I stop a response, when I view the chat, then the partial response is preserved
US-049	**As a** user, **I want to** see my chat history grouped by date **so that** I can find recent conversations quickly	• Given I have chat history, when I view the sidebar, then chats are grouped by Today, Yesterday, Last Week, Last Month, Older • Given I view history, the most recent conversations appear at top
US-050	**[Future] As a** new user, **I want to** see	• Given I open an empty chat, when I view the screen, then insight cards

	suggested prompts on the welcome screen **so that** I know what questions to ask	with suggested prompts appear • Given I see a prompt card, when I click it, then it starts a conversation with that prompt • Given I prefer no suggestions, when I check settings, then cards can be toggled off
US-051 ✅	**As a** user, **I want to** collapse the sidebar **so that** I have more screen space for the chat	• Given I want more space in the screen, when I collapse the sidebar, then it becomes icon-only mode • Given the sidebar is collapsed, when I click expand, then it opens fully • Given I set a preference, when I return later, then my sidebar state is remembered across sessions
US-052 ✅	**As a** user, **I want to** have my session auto-extend while I'm active **so that** I don't get logged out while working	• Given I'm actively using the app, when my access token expires, then the system automatically refreshes the token behind the scenes without interrupting my workflow • Given a 401 unauthorized error occurs during any API call, when the system detects the error, then it automatically attempts a token refresh and retries the original request • Given the token refresh succeeds, when the new token is received, then my session continues seamlessly with no user action required • Given the refresh token itself has expired or is invalid, when auto-refresh fails, then I am redirected to the login page