1. Phase 2 Project Charter

Project: Meeting Assistant - Phase 2 Enhancements

Introduction: This document outlines the second phase of development for the Meeting Assistant application, building upon the successful completion of the MVP (Epics 1-4). The goal of this phase is to enhance the core product's intelligence, expand its data-gathering capabilities, and build the foundation for a unified knowledge portal.

Phase 2 Goals:

1. **Enhance Core Meeting Intelligence:** Significantly upgrade the accuracy and workflow automation of the core meeting assistant with advanced features.
2. **Expand Data Source Integration:** Increase the assistant's contextual awareness by connecting to key enterprise data sources like Confluence, SharePoint, and Active Directory.
3. **Build the Knowledge Portal Foundation:** Create the initial version of the Unified Knowledge Portal, providing a central place for the user to view and manage the intelligence collected by the assistant.

Phase 2 Scope (Epics):

- **Epic 5:** Meeting Assistant v1.1 - Core Enhancements
- **Epic 6:** Knowledge Ingestion v1.1 - New Connectors
- **Epic 7:** The Unified Knowledge Portal - Foundation

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2. PRD Addendum: Post-MVP Epics & Stories

This document contains the detailed user stories and acceptance criteria for the new epics.

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Epic 5: Meeting Assistant v1.1 - Core Enhancements
* **Story 5.1:** As a user, I want the system to use visual cues from supported applications (MS Teams, Slack) to accurately identify speakers in the live transcript.
* **Story 5.2:** As a user, I want a seamless interface to correct any speaker identification—whether it's wrong, ambiguous, or unidentified—using rich visual context from

the transcript.
* **Story 5.3:** As a user, I want the duration of my audio bookmarks to be context-aware, capturing the entire relevant conversational segment rather than a fixed time window.
* **Story 5.4:** As a user, from the finalized debrief screen, I want the ability to automatically create a basic Jira ticket based on a selected action item.
* **Story 5.5:** As a user, when creating a new feature request in Jira, I want the AI to help me draft a well-formed user story and acceptance criteria.
* **Story 5.6:** As a user, from the finalized debrief screen, I want the ability to share the debrief summary to a Slack channel or user.
* **Story 5.7:** As a user, from the finalized debrief screen, I want the ability to share the debrief summary via a pre-populated email.

Epic 6: Knowledge Ingestion v1.1 - New Connectors
* **Story 6.1:** As a user, during a live meeting, I want the ability to manually trigger a search of our Confluence space on-demand.
* **Story 6.2:** As a user, during a live meeting, I want the ability to manually trigger a search of our SharePoint sites on-demand.
* **Story 6.3:** As a user, I want to connect the assistant to our Active Directory for daily contact enrichment and to improve real-time speaker identification.

Epic 7: The Unified Knowledge Portal - Foundation
* **Story 7.1:** As a user, I want a main dashboard for the Knowledge Portal that provides a high-level overview and navigation.
* **Story 7.2:** As a user, I want a searchable list of all my contacts with integrated "quick actions" (Email, Slack).
* **Story 7.3:** As a user, I want to be able to click on a contact and view a detailed profile page.
* **Story 7.4:** As a user, I want to be able to view a complete, searchable list of all my past meeting debriefs.
* **Story 7.5:** As a user, I want to be able to click on a meeting from the list and view its full, finalized debrief package.
* **Story 7.6:** As a user, I want a global search bar in the portal that can find contacts and debriefs stored in the assistant's database.
* **Story 7.7:** As a user, I want the global search to have an "extended" mode that also queries my connected external resources (Confluence, SharePoint) in real-time.

3. UI/UX Specification Addendum: Phase 2 Features

This document outlines the design requirements for the new features.

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Meeting Assistant - Phase 2 UI/UX Specification

1. Epic 5 UI Enhancements
* **Live Widget:** New UI controls are required for the "Identify Speaker" manual trigger (Story 5.2). This control must be non-intrusive.
* **Debrief Wizard:** A new UI flow is needed within the wizard for creating a Jira ticket from an action item. This may be a modal form.
* **AI Story Generation:** The Jira ticket form must include a "Generate with AI" button and a text area to display and edit the AI-generated story and acceptance criteria.
* **Sharing:** The post-approval step of the wizard requires new UI elements for sharing to Slack and Email.

2. Epic 6 UI Enhancements
* **Settings Page:** The "Data Sources" section must be updated with new UI for connecting to Confluence, SharePoint, and Active Directory.
* **Live Widget:** The widget needs a "Search Confluence" and "Search SharePoint" button, along with a simple interface to display their search results.

3. Epic 7 UI Design - Unified Knowledge Portal
* **Overall Design:** The portal will adhere to the established Glassmorphic, dark-themed design language.
* **Dashboard (Story 7.1):** Design a new main dashboard screen for the portal.
* **Contacts View (Story 7.2):** Design a searchable list view for contacts, including iconography for "Send Email" and "Send Slack" quick actions.
* **Contact Profile View (Story 7.3):** Design a detailed view to display all collected information about a single contact.
* **Meeting Debriefs View (Story 7.4 & 7.5):** Design a searchable list of all past meetings and a detailed view to display a single, finalized debrief package using the tabbed interface we designed.
* **Global Search (Story 7.6 & 7.7):** The main portal layout must include a prominent global search bar. The search results page must be designed to clearly separate internal and external results.

4. Architecture Document Addendum: Phase 2 Impact Analysis

This document contains the Architect's analysis of the new epics.

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Meeting Assistant - Phase 2 Architectural Impact Analysis

Review of Epic 5: Meeting Assistant v1.1 - Core Enhancements
* **Architectural Impact:** Low to Medium.
* **Notes:** Requires a new client-side service for visual speaker analysis. Requires new backend API clients for Jira, Slack, and an email provider. These are standard integrations that fit within the existing architecture.

Review of Epic 6: Knowledge Ingestion v1.1 - New Connectors
* **Architectural Impact:** Medium.
* **Notes:** Requires new backend services for authenticating with and querying the Confluence and SharePoint APIs. Requires a new scheduled task for the daily Active Directory sync. The relational database schema will need to be extended. These additions leverage the extensible, service-oriented architecture.

Review of Epic 7: The Unified Knowledge Portal - Foundation
* **Architectural Impact:** High.
* **Notes:** This epic is a major new feature set. It will require:
  * A new front-end application and repository for the portal itself.
  * A new "federated search" service on the backend to aggregate results from the internal DB and external APIs.
  * A new set of backend aggregation services and API endpoints to serve data specifically to the portal UI.
  * The existing architecture supports this expansion, but the work should be estimated as a major new project.

This set of four documents provides a complete and self-contained plan for your Phase 2 development.