### **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

### **2. PRD Addendum: Post-MVP Epics & Stories**

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

Markdown

## 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.

Markdown

# 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.

Markdown

# 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.