Quick Start Guide - AI Agents Platform (Next.js UI)

Version: 1.0 | **Date:** January 2025 | **Goal:** Get started in 5 minutes ⏱️

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1. Login (30 seconds)

URL: `https://your-domain.com/auth/login`

1. Enter your email and password
2. Click **Log in**
3. ✅ You're in! Welcome screen appears

First time? Contact your admin for login credentials.

Forgot password? Click "Forgot password?" → Check email → Reset

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2. Navigation Overview (1 minute)

Main Menu (Left Sidebar)

```
📊 Monitoring
   └ Dashboard, Workers, LLM Costs, Agent Performance

⚙️ Configuration
   └ Tenants, Agents, LLM Providers, Plugins, MCP Servers

🔧 Operations
   └ Queue Management, Execution History

🛠️ Tools
   └ System Prompts, Add Tool
```

Quick Navigation

- **Desktop:** Click sidebar items
- **Mobile:** Bottom navigation (4 icons: Monitoring, Configuration, Operations, Tools)

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3. Tenant Switcher (30 seconds)

Location: Top-right dropdown (next to your avatar)

To switch tenants:

1. Click tenant dropdown
2. Type to search (if you have 10+ tenants)
3. Select tenant → UI updates instantly

Current tenant is shown in the header (e.g., "tenant-abc")

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4. Keyboard Shortcuts (1 minute)

Shortcut	Action
`Cmd+K` (Mac) or `Ctrl+K` (Windows)	Open command palette (search pages, recent items)
`Cmd+D` (Mac) or `Ctrl+D` (Windows)	Toggle dark mode
`?`	Show all keyboard shortcuts
`Esc`	Close modals/dialogs

/	Focus search input (on pages with search)
Arrow keys	Navigate tables, dropdowns

Pro tip: Press `Cmd+K` → Type "agents" → Jump directly to Agent Management page

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5. Common Tasks (2 minutes)

Task 1: View Dashboard Metrics

1. Click **Monitoring → Dashboard** (or just `/dashboard`)
2. See real-time metrics: Active Agents, Pending Tasks, Avg Response Time, Success Rate
3. **Auto-refreshes every 5 seconds** (no manual refresh needed)

Task 2: Create a New Agent

1. Click **Configuration → Agents → + New Agent** button
2. Fill in:
   - **Name:** My Test Agent
   - **System Prompt:** "You are a helpful assistant"
   - **LLM Provider:** Select from dropdown (e.g., OpenAI GPT-4)
   - **Tenant:** (Auto-filled with current tenant)
3. Click **Save**
4. ✅ Agent appears in list

Task 3: Test an Agent

1. Go to **Configuration → Agents**
2. Click on an agent → Click **Test** button (or go to `/agents/[id]/test`)
3. Enter test input: "Hello, how are you?"
4. Click **Run Test**
5. See output in real-time

Task 4: View Execution History

1. Click **Operations → Execution History**
2. Use filters:
   - **Status:** All / Success / Failed / Running
   - **Date Range:** Last 7/30/90 days or Custom
   - **Agent:** Filter by specific agent
3. Click **Export CSV** to download results

Task 5: Check LLM Costs

1. Click **Monitoring → LLM Costs**
2. Select date range (Last 7/30/90 days)
3. See area chart + token breakdown table
4. Click **Export CSV** for detailed cost analysis

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6. Where to Get Help

In-App Help

- **Feedback Widget:** Click "💬 Feedback" button (bottom-right)
- **Keyboard Shortcuts:** Press `?` to see all shortcuts

Documentation

- **Migration Guide:** `docs/migration-guide.md` (if coming from Streamlit)
- **Changelog:** `docs/changelog.md` (what's new in v1.0)
- **Runbooks:** `docs/runbooks/` (troubleshooting common issues)
  - Login issues: `login-issues.md`
  - Performance issues: `performance-issues.md`

- Data sync issues: `data-sync-issues.md`
- **API Docs:** `/api/v1/docs` (Swagger UI for developers)

Support Channels

- **Email:** support@aiagents.example.com (placeholder)
- **Slack:** #ai-agents-support (if internal)

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7. Role-Based Permissions

Your role determines what you can do:

Role	Can View	Can Edit	Can Delete
Super Admin	Everything	Everything	Everything
Tenant Admin	Tenant data	Agents, configs	Agents, tenants
Operator	Dashboards, history	Queue (pause/resume)	❌
Developer	Agents, configs	Agents, plugins	❌
Viewer	Everything	❌	❌

Check your role: Click user menu (top-right) → Shows role for current tenant

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8. Tips & Tricks

Tip 1: Use Dark Mode for Long Sessions

- Press `Cmd+D` to toggle dark mode
- Reduces eye strain, saves battery on OLED screens

Tip 2: Use Command Palette for Speed

- Press `Cmd+K` → Type what you want (fuzzy search)
- Faster than clicking through menus

Tip 3: Export Data for Reporting

- Execution History and LLM Costs pages have **Export CSV** buttons
- Use for monthly reports, cost analysis

Tip 4: Mobile Access

- Fully responsive design works on phones and tablets
- Bottom navigation (4 icons) for quick access
- Swipe gestures for navigation

Tip 5: Real-Time Updates

- Dashboard auto-refreshes every 5 seconds
- Queue status auto-refreshes every 3 seconds
- Workers auto-refreshes every 3 seconds
- No need to manually refresh pages

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9. Known Issues & Workarounds

Issue 1: "Token expired. Please log in again"

Cause: Access token expires after 7 days **Fix:** Log in again (automatic redirect)

Issue 2: Data not updating immediately

Cause: Caching (Redis cache TTL = 30 seconds) **Fix:** Wait 30 seconds OR hard refresh (`Cmd+Shift+R`)

Issue 3: "You don't have permission to view this"

Cause: Your role doesn't allow this action (e.g., Viewer trying to edit) **Fix:** Contact admin to upgrade your role OR switch to a tenant where you have higher permissions

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10. Next Steps

After completing this quick start:

1. Watch the **5-minute video walkthrough** (`docs/video-walkthrough.md`)
2. Read the **migration guide** if coming from Streamlit (`docs/migration-guide.md`)
3. Explore the **API documentation** if you're a developer (`/api/v1/docs`)
4. Attend the **live demo** (scheduled 1 week before GA launch, check email)

🚀 **You're ready to go!** If you have questions, click the "💬 Feedback" button or contact support.

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PDF Version

To generate a 1-page PDF from this Markdown:

Option 1: Using Markdown to PDF Converter

```
npx md-to-pdf docs/quick-start-guide.md --pdf-options '{"format": "A4", "margin": "10mm"}'
```

Option 2: Using Pandoc

```
pandoc docs/quick-start-guide.md -o docs/quick-start-guide.pdf \
  --pdf-engine=xelatex \
  --variable geometry:margin=0.5in \
  --variable fontsize=9pt
```

Option 3: Using Print to PDF (Manual)

1. Open this file in a Markdown viewer (Typora, VS Code Markdown Preview, GitHub)
2. Print to PDF (Cmd+P → Save as PDF)
3. Adjust margins/font size as needed to fit on 1 page

Design Tips for 1-Page PDF:

- Use 2-column layout for sections 5-10
- Reduce font size to 9pt for body text
- Use icons for section headers
- Remove the "PDF Version" section from the printed PDF