



# Jylo Word Assistant (Beta)

*A guide for Jylo users*

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Version 1.0

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## Introduction

The Jylo Word Assistant brings Jylo's AI directly into Microsoft Word. Open the side panel within any .docx file to chat with your document, request summaries, draft new content and apply edits as tracked changes — all powered by the AI models enabled on your Tenant.

## Important

The Jylo Word Assistant is currently in Beta. Some functionality is intentionally limited at launch and will be expanded in future releases. See the Beta limitations section below before you begin.

## Before you begin

Your Microsoft 365 administrator must deploy the Jylo Word Add-In to your organisation before you can use it. For step-by-step deployment instructions, refer to [Deploying the Jylo Word Add-In](#). You will also need a Jylo account with at least one AI model enabled on your Tenant, and a Microsoft 365 subscription on Windows or Mac.

## What you can do

Once the Word Assistant is open, you can use it to work with any .docx file in the following ways:

- **Analyse documents:** Ask questions about your document and receive detailed answers with paragraph-level citations referencing the source content.
- **Summarise content:** Generate concise summaries of the full document or specific sections.
- **Draft and write:** Instruct the Assistant to draft new content, clauses or paragraphs directly within the context of your document.
- **Edit with tracked changes:** Request amendments and the Assistant will apply redline edits to your document. Review, accept or reject each edit individually — just as you would with any collaborator.
- **Choose your model:** Select from any AI model enabled on your Tenant using the model picker at the bottom of the chat panel.

## How edits work

When you ask the Assistant to make a change, it applies the amendment as a tracked change (redline) in your document. The edit appears in both the document and the chat thread, where you can review what was changed. You then have full control to Accept All or Reject All directly from the chat panel or use Word's built-in review tools to handle changes individually.

All edits are tracked in the conversation thread, giving you a clear audit trail of every amendment and the reasoning behind it.

#### Tip

Your expertise drives the process. The Assistant proposes changes; you decide what stays. Use the tracked changes workflow to maintain full control over your document. Reverse changes by selecting undo as normal.

## Beta limitations

The Word Assistant is in active development. As of launch, please be aware of the following:

- **Stateless chat:** The add-in does not record chat history. Closing the panel ends the session, and conversations are not saved back to a Project on the Jylo platform.
- **Source documents:** Reference material must be pasted directly into the chat thread rather than attached as files.
- **No Playbook connections:** The Word Assistant cannot yet connect to Playbooks or other data sources held in the Jylo platform.
- **Credit reporting:** AI credit usage from Word edits is not currently surfaced in the platform, though consumption is comparable to the Assistant.
- **Context window:** Document analysis is subject to the context window of the selected AI model.

## Frequently asked questions

### Which AI models can I use with the Word Assistant?

- **It depends** — the model picker shows every model enabled on your Tenant. If a model is available in the Jylo Assistant, it will be available in the Word Assistant.

### Does the Word Assistant work on Mac as well as Windows?

- **Yes** — the add-in is supported on both Windows and Mac, provided you have a Microsoft 365 subscription.

### Is my chat history saved between sessions?

- **No** — the Beta release is stateless. Each time you open the side panel, you start a fresh conversation. Conversations are not saved back to a Project.

### Can I use my Playbooks inside the Word Assistant?

- **Not yet** — Playbook connections are on the roadmap but not supported in the current Beta. For Playbook-driven analysis, continue to use the Jylo platform.

### How are AI credits counted for Word edits?

- **It depends** — credit consumption is comparable to the Jylo Assistant, but Word activity is not currently itemised in the platform usage view.

### Can I attach files to the chat?

- **No** — reference material must be pasted directly into the chat thread. File attachments are not supported in the Beta.

#### Remember

The Word Assistant is a Beta release and will evolve quickly. Functionality, limits and integrations are expected to change as new features are added.

### Links and contact

For deployment instructions, refer to [Deploying the Jylo Word Add-In](#). If you have any questions about the Word Assistant, contact us at [support@jylo.ai](mailto:support@jylo.ai).