Jylo

Projects and Files Storage

1. Introduction to Projects

1.1 What are Projects in Jylo?

Projects in Jylo 2.0 are central workspaces that organise all your AI analysis work in one location. Each Project serves as a container for your files, analysis, workflows, and team collaboration - ensuring all related work remains connected and accessible.

Projects store all your:

- Document files for analysis
- AI Assistants and conversation history
- Analysis Flows and verification records
- Team members and permissions

1.2 Project-Centric Approach

Projects are the foundational organisational structure in Jylo, designed to provide numerous benefits for teams working with AI-assisted document analysis.

Projects help you:

- **Organise Work Effectively**: Categorise by client, matter, department or other relevant structures
- **Streamline Workflows**: Perform and track all related processes from start to finish within an integrated workspace
- **Simplify Collaboration**: Add colleagues to specific Projects, providing targeted access to relevant materials
- **Maintain Comprehensive Records**: Retain and share valuable work from both AI outputs and team contributions
- **Ensure Security and Compliance**: Create isolated workspaces for confidential documents, maintaining ethical walls

- **Establish Clear Audit Trails**: Track all activity, creating transparency and accountability essential for regulatory compliance
- **Access Integrated Tools**: Utilise all document analysis tools—from file storage to AI analysis to verification—within a single context

This Project-centric approach ensures that teams can work efficiently while maintaining the security, organisation and accountability required for professional document analysis.

2. Getting Started with Projects

2.1 Creating a New Project

To create a new Project:

1. Navigate to the **My Projects** page in the "Me" section of the sidebar
2. Click the blue **Plus** button in the top-right corner
3. Complete the two-step wizard:
    - **Step 1**: Enter a descriptive Project Name and optional Description
    - **Step 2**: Complete required metadata fields and any optional fields
4. Click **Finish** to create your Project

Tip: Use clear, specific Project names that align with your project management system to help you, and your team identify the Project's purpose.

2.2 Project Settings and Metadata

After creating a Project, you can modify its settings at any time:

1. Select your Project from the Projects dropdown in the sidebar
2. Navigate to **Settings** in the Project menu

3. Use the left sidebar to access different settings areas:
    - **Project**: Modify the name and description
    - **Metadata**: Update organisation-specific fields

Metadata Fields are configured by your organisation administrator and may include:

- Client information and reference numbers
- Practice group or department designations
- Security classifications and confidentiality levels
- Context about the Project
- Custom organisational values

These fields help categorise and organise Projects across your organisation for better searchability and management.

2.3 Team Management

To add team members to your Project:

1. Navigate to the **Team** section in the Project menu
2. Click the blue **Plus** button to open the team member selection dialog
3. From the "Available users" column, select users to add
4. Click the right arrow to move them to the "Team members" column
5. Click **Save** to confirm your selections

Team members can be assigned one of two roles:

- **Admin**: Full Project control, including user management
- **User**: Standard access to Project content without user management capabilities

To modify a user's role:

1. Locate the user in the team list

2. Click the pencil icon in the Actions column
3. Select the appropriate role from the dropdown menu

Note: Only users with Admin role can add or remove team members and change role assignments.

3. Managing Files

3.1 Uploading Documents

To add documents to your Project:

1. Navigate to the **Files** section in the Project menu
2. Browse to your desired folder location
3. Click the blue **Plus** button
4. Select "Upload files" from the dropdown menu
5. Either:
    - Drag and drop files into the upload area
    - Click "browse" to select files from your computer
6. Click **Upload Files** to complete the process

Tip: You can upload multiple files at once, and Jylo will maintain any folder structure if you drag and drop a folder containing files.

3.2 File Organisation and Folder Structure

Jylo 2.0 offers a hierarchical folder system for organising your documents:

- **Home**: The root directory for all Project files
- **Folders**: Create main categories for document organisation
- **Subfolders**: Create nested folders for more detailed organisation

To create a new folder:

1. Navigate to your desired location in the Files section

2. Click the blue **Plus** button
3. Select "Add folder" from the dropdown menu
4. Enter a folder name and click **Create**

Navigate between folders using:

- The folder navigation panel on the left side
- The breadcrumb trail at the top of the content area

Best Practice: Create a logical folder structure that mirrors your organisations storage system.

3.3 Supported File Types

Jylo supports a variety of document formats commonly used in legal practice:

- **.docx** (Word documents, including pleadings and contracts)
- **.xlsx** (Excel spreadsheets, such as financial exhibits)
- **.msg** (Outlook emails)
- **.eml** (Email files)
- **.tiff / .tif** (TIFF images, often used in disclosure)
- **.jpg / .jpeg** (JPEG images)
- **.png** (PNG images)
- **.txt** (Plain text)
- **.pdf** (PDF documents)
- **.pst** (PST tables)

Note: Image files undergo OCR, only the text layer will be read by the chosen model.

3.4 File Management Best Practices

For optimal file management in Jylo:

- **Create a consistent naming convention** for files and folders
- **Establish a standard folder structure** across Projects that mirrors common workflows
- **Limit folder nesting** to 2-3 levels to prevent excessive navigation while maintaining logical organisation
- **Consider team members** when uploading sensitive data to a Project
- **Regularly review and archive** completed work to maintain a clean workspace

Remember: All files within a Project are only accessible to team members with appropriate permissions, supporting your professional obligations regarding client confidentiality and data protection requirements.

4. AI Analysis

Once you have created a Project and uploaded the necessary documents you will be ready to start collaborating with AI using Assistant and Flows. These features enable you to quickly draw insights from AI or leverage its capabilities on larger more complex workflows. See the Flows and Assistant Guides to get started.