Jylo

User Guide 2.0

Contents

1. Introduction

Jylo is an Artificial Intelligence platform designed to couple human expertise with AI to automate complex workflows with dynamic validation mechanics built into the process. This guide will help you understand and effectively use the Platforms features.

2. Core Principles

Project Centricity

Jylo stores all AI work in Projects, enabling efficient sharing and archiving across teams. This Project-based approach ensures work remains organised and accessible to all relevant team members, supporting collaborative analysis and review.

End to End Automation

Users can template their workflows inside a Playbook and have Artificial Intelligence execute them from start to finish in a Flow. These tools facilitate the consistent deployment of high-quality processes throughout your organisation.

Verification Workflow

The built-in Verification System enables quick approval of AI outputs while maintaining quality control. Every AI response can be verified, edited, or rejected, creating a clear audit trail of human oversight.

Multi-Model Support

Jylo is compatible with a selection of major Language Models, each with a unique skillset. Various parts of complex workflows can be executed using the most qualified model for the task.

Compliant Chat

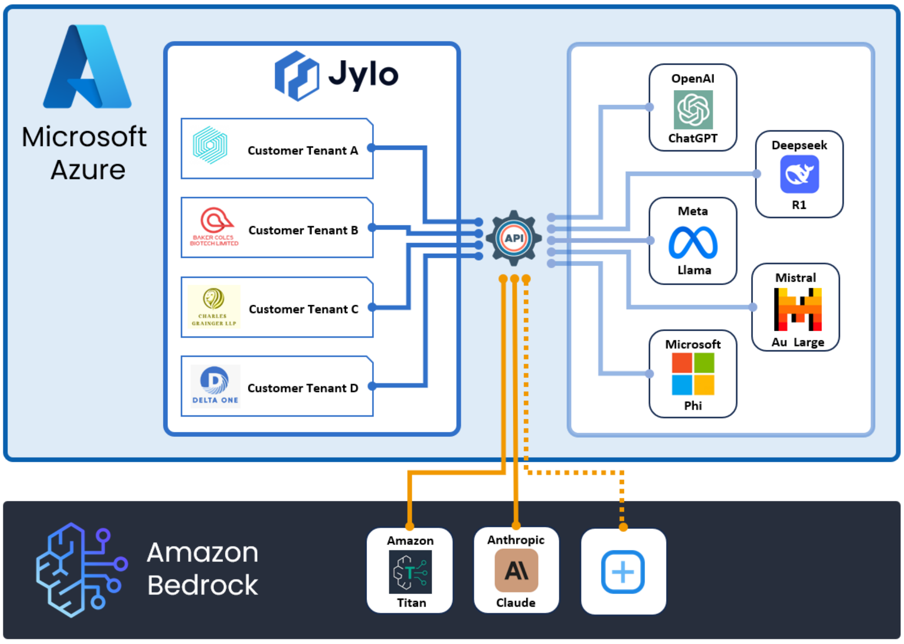
The Platform provides secure access to AI models while protecting intellectual property. All interactions occur within a controlled environment that prevents sensitive data from being used for model training.

3. Security

Your Jylo Tenant operates on Microsoft Azure with secure API access to AI models. The platform implements continuous authentication and automated security controls to prevent unauthorised access.

All data remains private and accessible only to authorised organisation members. Jylo never shares your data with third parties, and features are private by default to ensure information security.

Access is managed through a Role-Based Security Model. Users with elevated permissions can control Project and Playbook access, ensuring sensitive information remains protected while enabling necessary collaboration.



4. Navigation and Interface

The Jylo interface is divided into:

- Sidebar: Main navigation menu
- User controls: Preferences, notifications and account
- Content area: Active workspace that changes based on your current selection

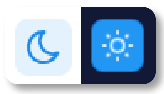
4.1 User Controls

Access notifications, language, display, and account settings from the control bar.

Supported Languages:

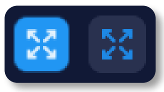
- English (UK)
- Français (French)
- Deutsch (German)
- Español (Spanish)
- 中国人 (Chinese)

Display Mode



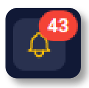
Toggle between light and dark modes.

Fullscreen Mode



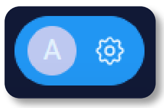
Enter or exit fullscreen mode (or press ESC).

Notifications



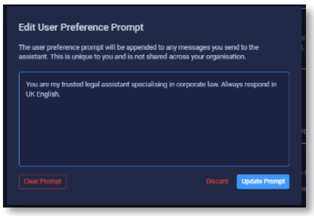
Access notifications via the bell icon. A red badge shows unread notifications count.

User Profile



Your user profile is accessible via your profile icon showing your initial in the top-right corner. Click to view your profile information including your name, email address and role. From this menu you can set your preference prompt, this will influence how the model responds whenever you use the Assistant feature inside a Project.

To set your preference prompt:



1. Click the profile button
2. Press Edit User Preference Prompt
3. Enter your instructions into the text field
4. Hit Update Prompt

The profile icon also allows you to:

- Access the Starter Guide for help
- Contact Support
- Check system Status
- Access the Trust centre
- Log out of the platform

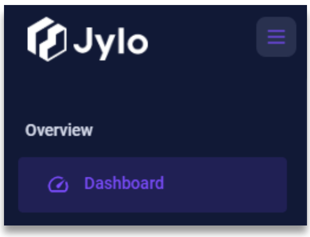
4.2 Sidebar Menu

The sidebar menu provides hierarchical access to all major functional areas of the Jylo platform. This structured approach ensures efficient navigation throughout the system.

Main Sections and Components

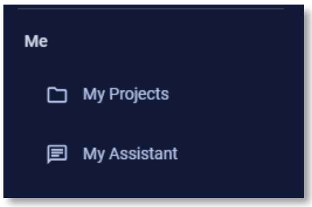
The navigation is organised into five sections, each containing specific subsections:

Overview



- **Dashboard**: The central hub displaying personal Project information, and recent activity. This serves as the starting point for users upon login.

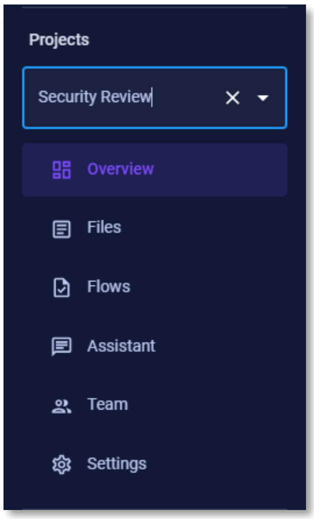
Me



- **My Projects**: A centralised repository showing all Projects you have access to.
- **My Assistant**: Direct access to your personal AI Assistant from anywhere in the platform.

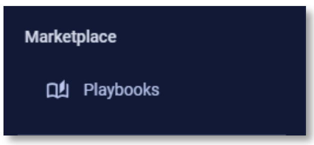
Projects

When a Project is selected from the dropdown menu, the Projects section expands to reveal six functional components:



- **Overview**: Project-specific dashboard showing activity information and metrics for the selected Project.
- **Files**: Document management system for uploading, organising, and accessing all Project-related documents.
- **Flows**: Structured document analysis area where Playbooks can be applied to documents for analysis, verification and reporting.
- **Assistant**: AI chat providing conversation and document interaction.
- **Team**: Member management interface for controlling access permissions and roles within the Project.
- **Settings**: Configuration options for Project metadata, naming, and related parameters.

Marketplace

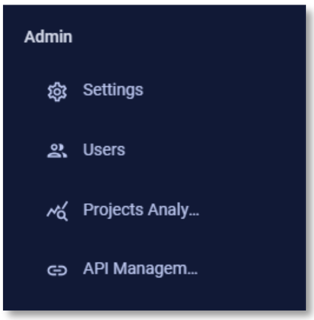


- **Playbooks**: Repository containing all available analysis templates that can be applied to documents.

Admin

This section is visible only to users with administrator privileges and provides platform management functions:

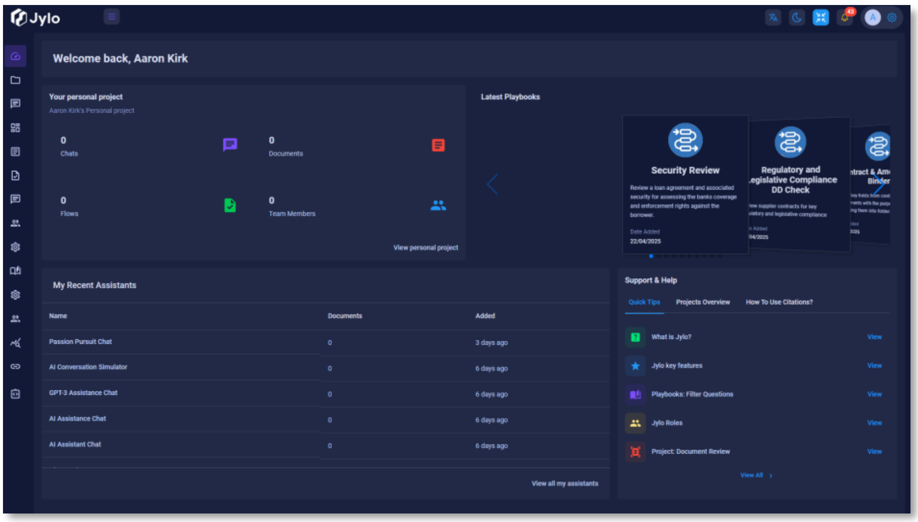
- **Settings**: Global configuration options affecting the entire organisation's Jylo implementation.
- **Users**: User management interface for creating, modifying, and removing user accounts.
- **Projects Analytics**: Advanced reporting interface showing usage patterns and cost metrics across all Projects.
- **API Management**: Interface for creating and managing secure API credentials for external system integration



5. Overview

5.1 Dashboard

The Dashboard is your starting point in Jylo, providing an overview of your activities within your personal Project.



Your Personal Project

Jylo users are automatically assigned a personal Project upon account creation. This Project is private to you and serves as a space for individual work before sharing with teammates.

Latest Playbooks

This carousel showcases the Playbooks you've recently used in your personal Project.

My Recent Assistants

This section lists your most recently used AI Assistants.

Support & Help

The Support & Help panel provides quick access to learning resources, including embedded video content.

Version Information

The current version of the Jylo platform is displayed in the bottom-left corner of the navigation bar. This helps you confirm which features should be available and can be useful when contacting support.

6. Me

The "Me" section provides quick access to your personal workspace within Jylo, including Projects you're a member of and your personal AI Assistant.

6.1 My Projects

The My Projects page serves as a central hub for accessing all Projects you're a member of across the platform and creating new Projects.

Creating New Projects

To create a new Project:

1. Click the Plus button in the My Projects page
2. In the "Create Project" dialog, complete the two-step process:
    - **Step 1: Project Details**
        - Enter a clear, descriptive Project Name
        - Provide a Project Description with additional context about the Project's purpose or scope
        - Click "Next" to proceed to metadata settings
    - **Step 2: Metadata Settings**
        - Complete all fields under "Required Metadata Settings"
        - Optionally complete fields under "Available Metadata Settings"
        - Click "Back" to return to Project Details if needed
        - Click "Finish" to create the Project
3. After completing both steps, you'll be automatically directed to the Project's Overview page

Note: The specific metadata fields you'll see during Project creation are configured by your organisation's administrator.

6.2 My Assistant

My Assistant provides a convenient shortcut to access your personal AI Assistant from anywhere within the platform. For a comprehensive explanation of Assistant please refer to Section 7.5 Assistant.

7. Projects

7.1 Project Selection

The Projects section allows you to work with specific Project instances within Jylo.

Project Dropdown

To select a Project:

1. Click the dropdown menu labelled "Select Project" in the left navigation sidebar
2. A list of your most recent Projects will appear
3. Click on the Project name you wish to access

Once you select a Project, the Project name will appear in the dropdown field, and all subsequent navigation within the Projects section will apply to this selected Project.

7.2 Overview

Resource Metrics

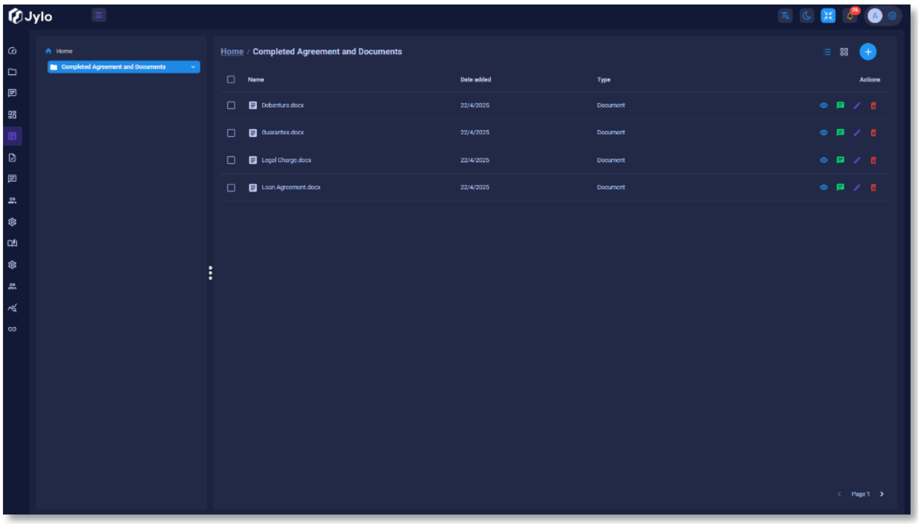
The Overview page features four tiles which display the total count of Assistants, Files, Flows and Team Members.

Latest Project Activity

The Overview page includes a "Latest Project Activity" section that displays the most recent Flows and Assistants.

7.3 Files

The Files section provides a centralised repository for all documents within the Project.

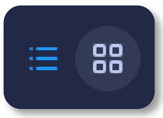


Navigation Structure

- **Folder Navigation Panel**: Located on the left side, displays your folder hierarchy
  - **Home**: The root directory for all files in the Project
  - **Folders**: Main categories for document organisation
  - **Subfolders**: Nested folders for more granular organisation
- **Breadcrumb Trail**: Path navigation at the top of the main content area
  - Shows your current location in the folder hierarchy
  - Clickable links to navigate up the folder tree

File Display Options

You can display the content area in grid or list format using the view toggle buttons in the top-right corner.



File Management

The Files section provides several tools for managing your documents:

- **Selection Checkboxes**: Select multiple files for batch operations

Uploading Files

To add documents to your Project:

1. Navigate to the desired folder location
2. Click the blue plus button
3. Select "Upload files" from the dropdown menu
4. In the upload dialog, you can add files in two ways:
    - **Drag & Drop**: Drag files directly from your computer into the dotted upload area
    - **Browse**: Click "browse" to open a file selector and choose files from your system
5. Selected files will appear in the queue with their file names and sizes
6. Click "Upload Files" to complete the process, or "Remove All" to clear the selection

Assistant Shortcut

The files page allows you select documents for Analysis using Assistant. You can either:

- Select multiple documents by clicking the check boxes followed by Chat with Selected documents
- Hit the Open Assistant button in the actions column of the desired document

Supported File Types

Jylo supports a variety of document formats for analysis:

- .docx (Word document)
- .xlsx (Excel spreadsheet)
- .msg (Outlook email)
- .eml (Email file)
- .tiff / .tif (TIFF image)
- .jpg / .jpeg (JPEG image)

- .png (PNG image)
- .txt (Plain text)
- .pdf (PDF document)
- .pst (PST table)

All files remain securely stored within your Project and are only accessible to team members.

7.4 Flows

The Flows section enables structured AI-powered document analysis using Jylo Playbooks, with navigation like the Files section.

7.4.1 Creating and Launching a Flow

The process of creating a new Flow in Jylo follows a structured three-step workflow that guides you through naming your Flow, selecting documents, and choosing an appropriate Playbook for analysis.

Step 1: Flow Setup

To begin creating a new Flow:

1. Navigate to your desired location in the Flows section
2. Click the blue Plus button in the top-right corner
3. Select "Add Flow" from the dropdown menu

This launches the "Create Flow" wizard with three clearly defined steps shown at the top:

- Step 1: Name
- Step 2: Playbook
- Step 3: Documents

In the first step, you'll need to provide:

- **Flow Name**: A descriptive title for your Flow

- **Flow Description**: Optional additional context about the Flows purpose

Once you've entered this information, click "Next" to proceed to document selection.

Step 2: Playbook Selection

In the second step, you'll choose a Playbook to apply to your selected documents.

- Once you are happy with your chosen Playbook, click the Next button to continue to the Documents page.

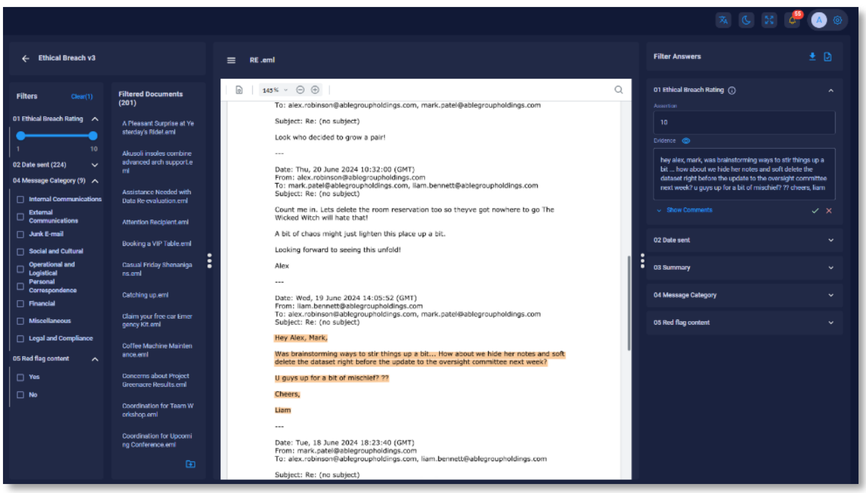
Step 3: Document Selection

The final step allows you to select the documents that will be analysed in your Flow from the Project files

- When you've selected all required documents, click "Finish" to launch the Flow.

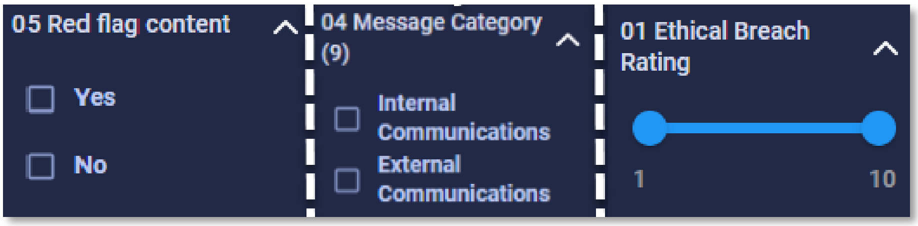
7.4.2 Flow Interface

After completing the setup wizard, Jylo begins processing your Flow. Once processing is complete, you'll be presented with the Flow interface, which is divided into three main sections:



Left Panel – Filter Buttons and Document Selection

- Displays filter buttons used to navigate the dataset based on responses to deterministic prompts
  - Checkboxes correspond to Y/N and List of value prompts
  - Sliders are used to filter through a numeric range

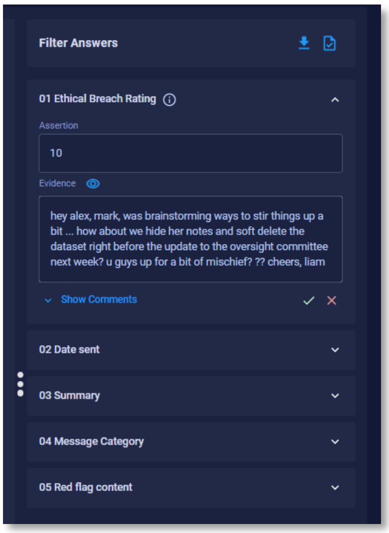


Middle Panel - Document View

- Displays the currently selected document
- Highlights relevant text when evidence is selected from the right panel

Right Panel - Responses

- Displays all prompt responses
- Displays verification status
- Provides "Evidence" buttons that highlight supporting text in the document for relevant question types
- Includes comment sections for each response
- Shows verification controls



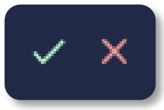
7.4.3 Working with Flows

The Flow interface provides several tools for effectively reviewing and verifying document analysis:

Document Filtering and Navigation

- The "filtered Documents" section displays only documents that match your selected criteria
- Click on any document in the filtered list to view it in the document panel

Evidence and Verification



Approve or reject responses using checkmark or cross icons.

For editable responses:

- Yes/No: Select appropriate radio button
- Range: Edit value in input field
- List: Remove items with trash icon or add via "Add new category"

Click "Evidence" to highlight supporting text.

Comment and Collaboration

For each response:

- Click "Show Comments" to expand the comments section
- Enter your feedback in the comment field and click "Comment"

Exporting Results

The Flow interface provides several options to export your analysis results. To access these options:

1. Click the download icon in the top-right corner of the responses panel

2. A dropdown menu appears with the following export options:

- **Export Spreadsheet**: Creates a tabular export of all results across documents, including verification status, user comments and any edits made to the AI-generated outputs, allowing for comprehensive analysis and audit trails

- **Export spreadsheet with source documents**: Includes both the analysis results with all user modifications and the original documents in the export
- **Generate assembly document (Beta)**: Creates a Word document based on the assembly template defined in the Playbook.

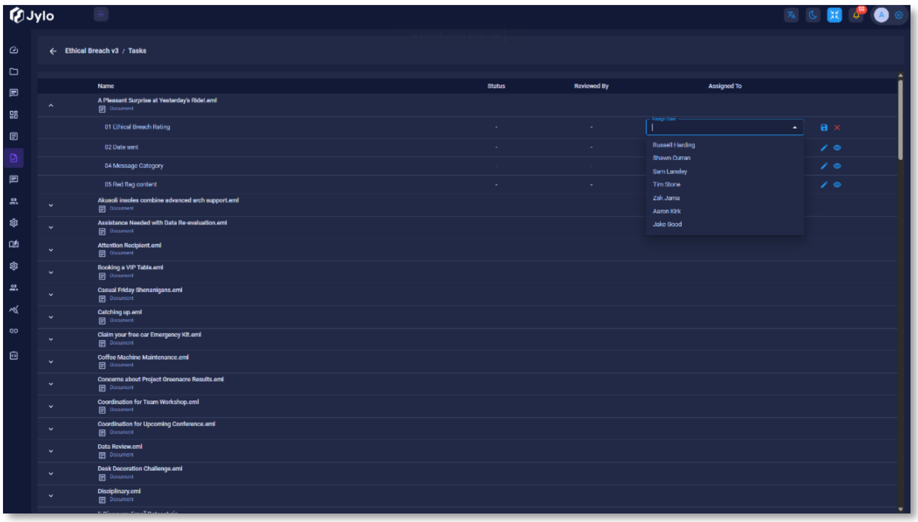
By leveraging these tools, you can systematically review documents, verify AI-generated outputs, and collaborate with team members to ensure high-quality analysis across your document set.

7.4.4 Tasks

The Tasks page allows you to direct team members to a particular output and is accessible via the Tasks button inside the Flow interface.

To allocate a task to a team member:

1. Click the pen button next to the relevant heading
2. Assign the desired team member to the task
3. Click the save button

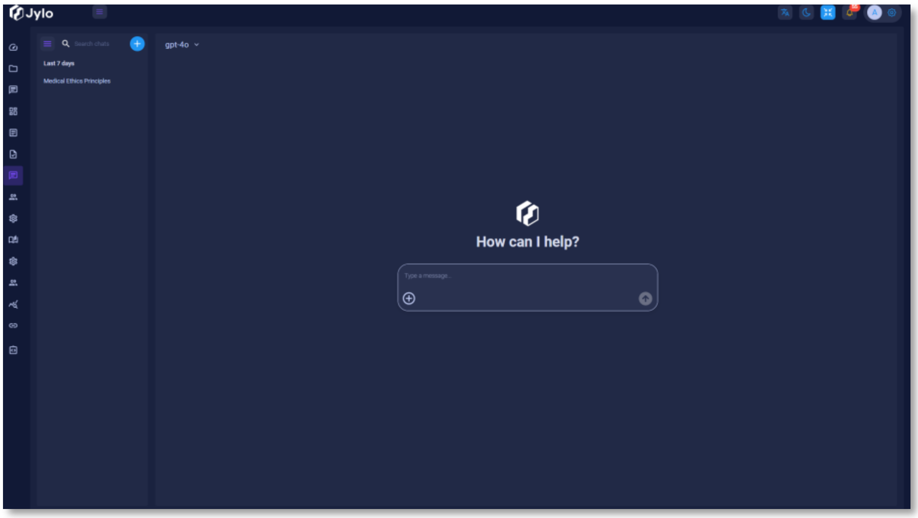


- Edit the assignee using the same process
- View tasks via the view button

Team members will be notified after having been assigned a Task.

7.5 Assistant

The Assistant provides AI chat with conversation and document analysis capabilities.

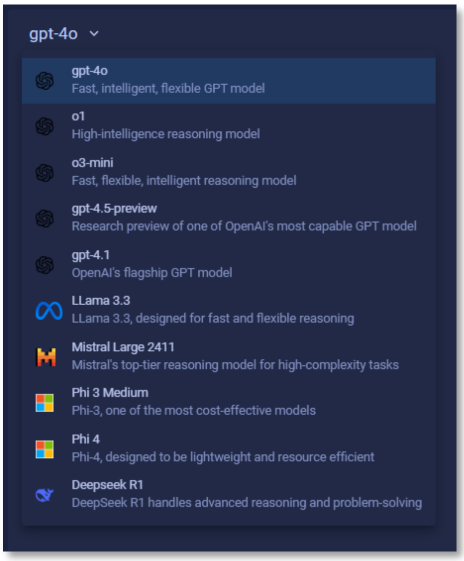


- Start new: Click blue plus button
- Enter prompts in input field
- Upload files via attachment button

7.5.1 Model Selection

The Assistant provides access to multiple AI models with varying capabilities.

To select a model:



1. Click the model dropdown menu in the top-left corner of the Assistant interface

2. A list of available models will appear with their descriptions

3. Select your preferred model from the list

4. The Assistant will use your selected model for all subsequent interactions until you change it again

7.5.2 Working with Responses

Citation Verification:

- When analysing documents citations appear as number icons at the end of assertions
- Click on a citation to highlight the corresponding text in the document view
- This allows you to verify the accuracy of the AI's interpretation

7.6 Team

The Team section provides tools for managing user access and permissions within your Project.

7.6.1 Team Interface

The Team section manages user access and permissions within your Project, displaying:

- **Name:** User's full name
- **Role:** Assigned permission level

- **Actions:** User management buttons

Role Types

Jylo offers two distinct role types that determine what actions users can perform within a Project:

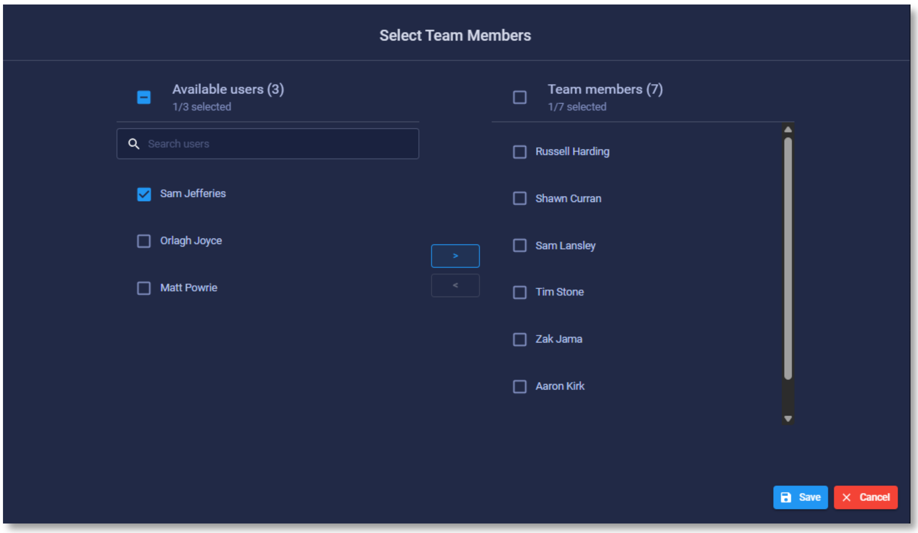
- **Admin**: Full control over the Project, including the ability to add/remove users and change user permissions
- User: Standard access to view and work with Project content without user management capabilities

7.6.2 Adding Team Members

To add new members to your Project team:

1. Click the blue Plus button
2. The "Select Team Members" modal will appear with two columns:
   - **Available users**: Lists all Jylo users who are not currently part of your Project team
   - **Team members**: Shows users who already have access to the Project
3. In the "Available users" column:
   - Use the search bar at the top to find specific users by name
   - Select users by checking the boxes next to their names
4. Click the right arrow button between the columns to move selected users to the "Team members" list
5. Review your selections in the "Team members" column
   - If needed, you can remove users from this list by selecting them and clicking the left arrow button

6. Click the "Save" button to confirm your changes, or "Cancel" to discard them

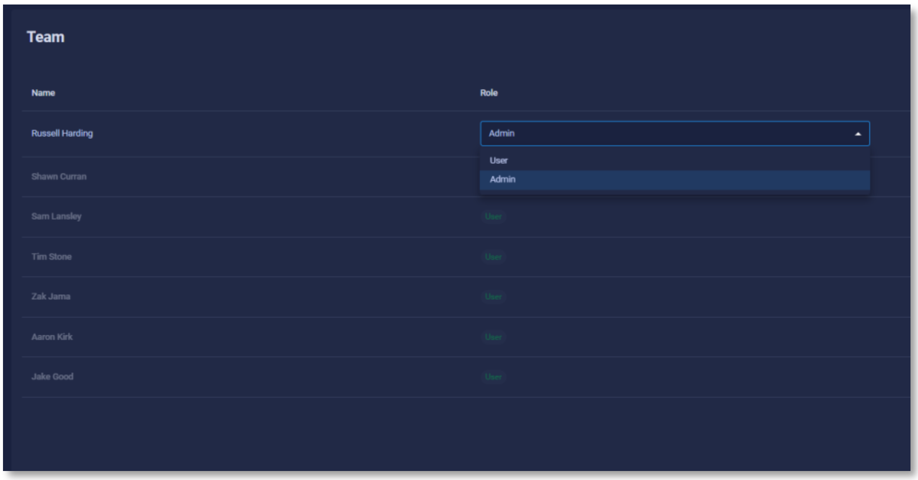


Users added to the team will immediately gain access to the Project with the default "User" role.

7.6.3 Managing User Roles

Project Admins can modify the permissions of team members by changing their assigned roles:

1. Locate the user whose role you want to modify in the team list
2. Click the pencil icon in the Actions column
3. A role dropdown menu will appear showing the available roles
4. Select the appropriate role from the dropdown



Role Permissions

Admin users can:

- Add or remove team members
- Change user roles
- Modify Project settings

User level members have access to all other Project features.

7.6.4 Removing Team Members

To remove a user from your Project team, click the trash icon in the Actions column and confirm by clicking the Delete button.

7.7 Settings

The Settings section provides tools for configuring your Project's basic information and metadata.

The Project settings interface is divided into two main categories, accessible via the left sidebar:

- **Project**: Basic Project information including name and description
- **Metadata**: Additional contextual information about the Project's scope and client

Each category provides specific configuration options relevant to that aspect of your Project.

7.7.1 Project Configuration

The Project section allows you to set or modify basic Project information:

- **Project name**: The primary identifier for your Project, visible in Project lists and navigation
- **Project Description**: Additional context about the Project's purpose or scope

To update Project information:

1. Click on the "Project" option in the left sidebar of the Settings page
2. Enter or modify the Project name in the "Project name" field
3. Enter or modify the Project description in the "Project Description" field
4. Click "Save Changes" at the bottom of the page to apply your modifications

Delete

To delete the Project, select the Delete Project button and confirm via the Yes button in the pop up.

7.7.2 Metadata Configuration

The Metadata section allows you to add contextual information about the client and Project scope. Required metadata is specified on Project creation.

Metadata Settings

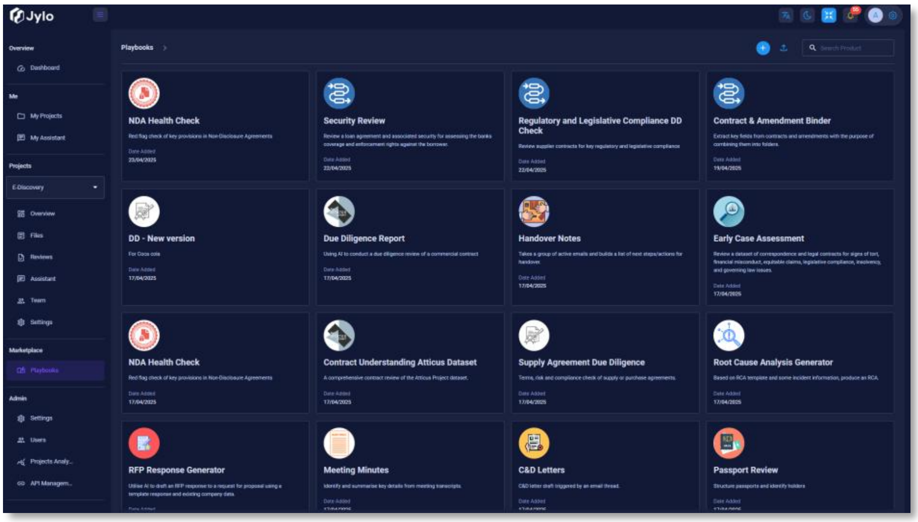
Metadata fields are configured by your organisations Admin and is filled out on Project creation.

To make changes to the Project metadata:

1. Click on the "Metadata" option in the left sidebar of the Settings page
2. Modify in the required fields.
3. Add additional metadata if necessary
4. Changes will save automatically and display a green verification time stamp

8. Marketplace

The Marketplace provides access to Playbooks - reusable workflow templates for document Flows across Projects.



8.1 Managing Playbooks

Importing Playbooks:

- Click the blue upload button and select "Import Playbook"
- In the import dialog, either:
  - Drag and drop a Playbook zip file into the designated area
  - Click "browse" to select from file explorer
- The imported Playbooks will appear in your Marketplace collection

Exporting Playbooks:

- Select a Playbook from the grid
- Click the download icon in the Playbook overview tile
- The Playbook is exported as a zip file containing all configurations

Accessing a Playbook:

Clicking on a Playbook card takes you to the overview tile showing:

- All prompt headers and descriptions
- Expected Assembly document types (Beta)

With builder access, you can:

- View all configured prompts and sub-prompts
- Test the Playbook on sample documents
- Manage access controls

8.2 Creating a New Playbook

Creating a Playbook follows six steps:

Step 1: Metadata

1. Click the blue plus button in Playbooks Marketplace

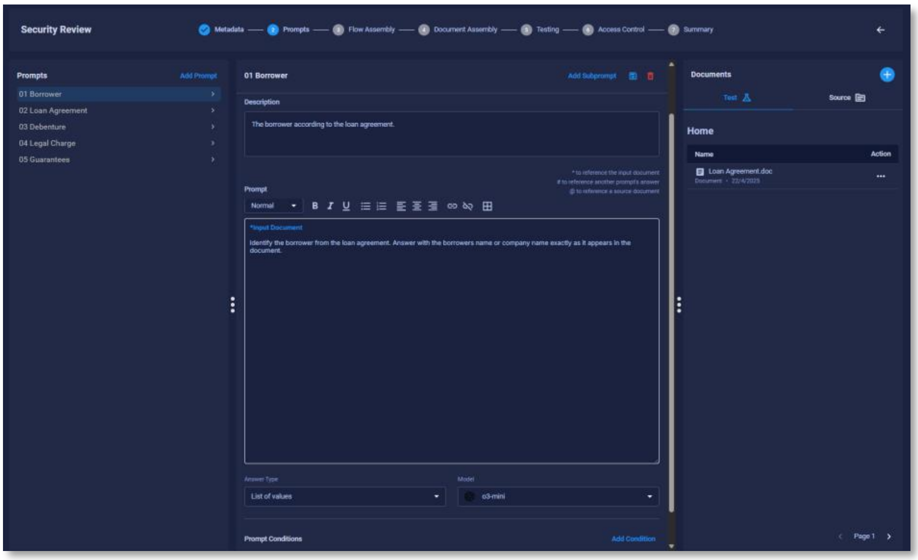
2. Enter Name and Description for your Playbook

3. Click "Save And Continue"

Note: This information appears to users browsing the Marketplace.

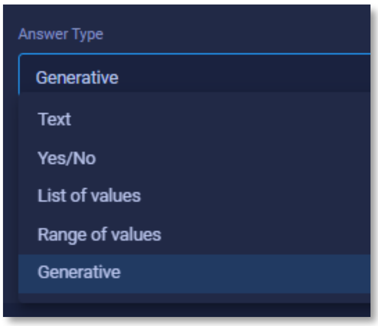
Step 2: Prompts

The Prompts step is where you create the foundation of your analysis workflow:



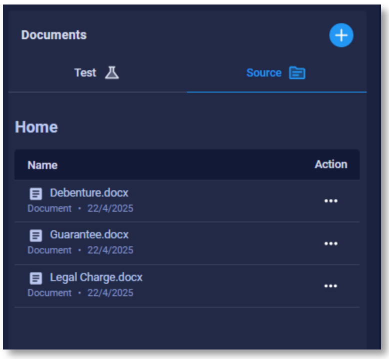
1. **Prompt Creation Interface**: The screen is divided into three panels:
   - Left panel: Lists all created prompts
   - Middle panel: Prompt configuration form
   - Right panel: Document upload area (for test and source documents)
2. **Creating a Prompt**:
   - Click "Add Prompt" in the left panel
   - Complete the prompt configuration form with:
     - **Heading**: Descriptive identifier
     - **Description**: Explanation of the prompts purpose
     - **Question**: Prompt text applied to documents
     - **Answer Type**: Select from Yes/No, Text, List of values, Range of values, or Generative
     - **Model**: Choose the AI model to process this prompt
3. **Answer Types and Their Applications**:

- **Filtering-Capable Types** (can analyse content AND filter documents):
  - **Yes/No**: For binary decisions (presented as check boxes)
  - **List of values**: For multiple categorical items (presented as checkboxes)



  - **Range of values**: For numerical results (presented as a slider control)
- **Analysis-Only Types** (provide analysis but cannot filter documents):
  - **Text**: For a short sting response with evidence
  - **Generative**: For long-form outputs without citation links

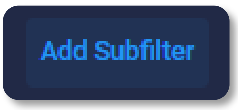
4. **Managing Documents**:
   - Toggle between "Test" and "Source" tabs to manage different document types
   - Upload documents using the blue plus button in the Documents panel
   - Test documents are used for testing the Playbook during creation



   - Source documents serve as reference material that can be linked using the @ symbol

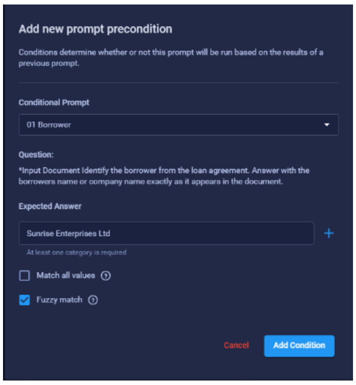
Step 3: Sub-prompts and Conditional Logic

1. **Creating Sub-prompts**:



- Select a prompt in the left panel that will be the parent
- Click "Add Subprompt"
- Complete the configuration form with the same fields as regular prompts
- You can drag and drop to rearrange the hierarchy if needed

2. **Setting Up Prompt Conditions**:
    - Select a prompt or sub-prompt that should be conditionally triggered
    - Scroll to the "Prompt Conditions" section at the bottom of the form
    - Click "Add Condition" to open the condition modal



    - From the dropdown list, select the prompt that will trigger this condition
    - Configure the condition details based on the trigger prompt's answer type:

For Yes/No Prompts:

- Select either "Yes" or "No" using the radio buttons
- Click "Add Condition" to save your selection

For List of Values Prompts:

- Enter a specific value designed to match the potential output of the list of values prompt
- Click the plus button to add it to the condition
- Add multiple values if needed (creates an OR relationship by default)

- Optionally check "Match all values" to require all values (AND relationship)
- Optionally check "Fuzzy match" to allow for spelling variations
- Click "Add Condition" to save

For Range of Values Prompts:

- Enter minimum and maximum values in the respective fields
- The condition triggers when the prompt's value falls within this range
- Click "Add Condition" to save

For Text Prompts:

- Enter the text you expect to find in the prompt's response
- Optionally check "Fuzzy match" for minor spelling differences
- Click "Add Condition" to save

3. Added conditions appear in a table at the bottom of the prompt configuration
4. You can delete conditions by clicking the trash icon next to each one

Important Notes on Prompt Conditions:

- All prompt types except "Generative" can trigger conditions
- Parents cannot be triggered based on their sub prompts, otherwise conditions can be applied multi-directionally regardless of hierarchy
- When conditions are not met, the prompt will not appear in the Flow interface
- Subprompts will not appear unless their parent is triggered

Step 4 Flow Assembly (Beta):

Assembly enables prompt responses to be consolidated into a Word document formatted to the specifications of the Playbook builder.

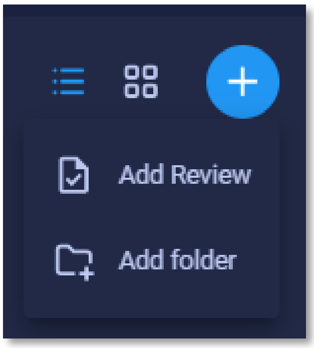
Use the document editor to structure the output of results across the entire dataset (Flow assembly) or a single document (Document assembly) and then insert the expected values returned by AI by pressing the # button to bring up a menu of prompts. Select the prompt you'd like to reference, and then the components you'd like to inject from the list.

This feature is currently a work in progress.

Step 5: Testing

The Testing step allows you to validate your Playbook against sample documents:

Creating Test Flows:



1. Click the blue plus button in the top-right corner
2. Select "Add Flow" from the dropdown menu
3. Follow the three-step process:
   - Enter a name and description for your test Flow
   - Select from your uploaded test documents
4. Click "Create" to generate the test Flow

Launch Flows from inside folders to organise your tests.

Step 6: Access Control

Configure who can use and modify your Playbook:

1. **Access Configuration Interface**:
   - You'll see a list of all users in the organisation

- Each user has permission checkboxes next to their name
- Toggle "Show only assigned users" to filter the view

2. **Setting Organisation-Wide Availability**:
   - Locate the "Organisation wide" toggle at the top of the screen
   - Toggle ON to make the Playbook available to everyone
   - Toggle OFF to restrict access to specifically assigned users
3. **Assigning Permission Types**:
   - **Builder**: Check this box to allow a user to edit the Playbook
     - Builders can modify prompts, conditions, and templates
     - Only users with builder permission can modify the Playbook after publication
   - **Consumer**: Check this box to allow a user to use the Playbook and view internal information.
   - **Organisation Wide Access**: Users with organisation wide access can preview and use the Playbook but they cannot view or edit internal information like headers and prompts.
4. **Finalising Permissions**:
   - After configuring all user permissions, click "Next" to proceed
   - You can return to this step later if you need to adjust permissions

Step 6: Summary

The Summary step provides a comprehensive overview of your completed Playbook:

1. **Reviewing Playbook Overview**:

- Examine the Playbook name, description
- Upload a Playbook icon
- Review the list of all prompts and their descriptions
- This is what users will see when browsing the Playbook in the Marketplace

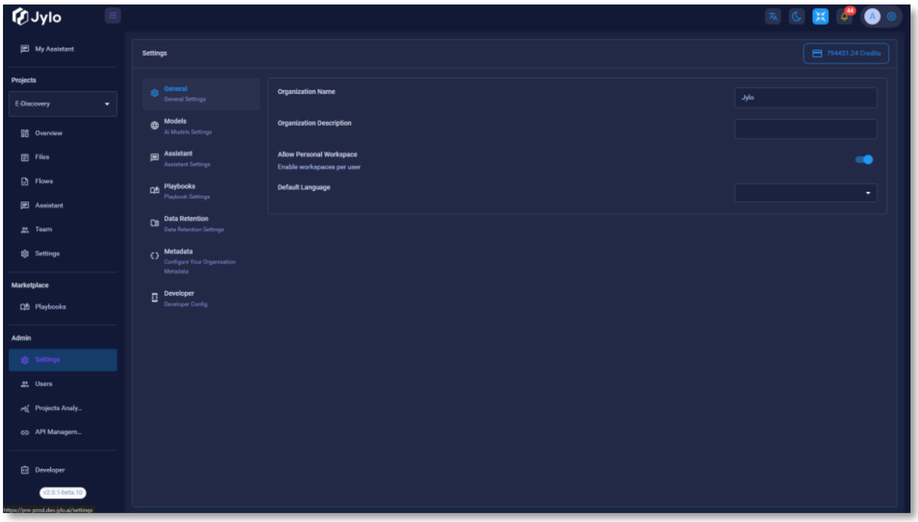
2. **Completing Publication**:
    - Click "Save And Exit" to publish your Playbook to the Marketplace
    - The Playbook becomes available based on the access permissions you defined
    - Users with appropriate permissions can now find and apply your Playbook to document Flows

9 Admin

The Admin section provides platform-wide configuration tools and management features for Jylo administrators. Only users with administrator privileges can access this section of the platform.

9.1 Settings

The Settings section provides platform-wide configuration tools for Jylo administrators.



9.1.1 General

Configure system-wide options:

- **Organisation Name:** Primary identifier displayed throughout the platform
- **Organisation Description:** Context about your organisation
- **Allow Personal Workspace:** Toggle whether users have private Projects
- **Default Language:** Set default language for all users

Changes take effect immediately after saving.

9.1.2 Models

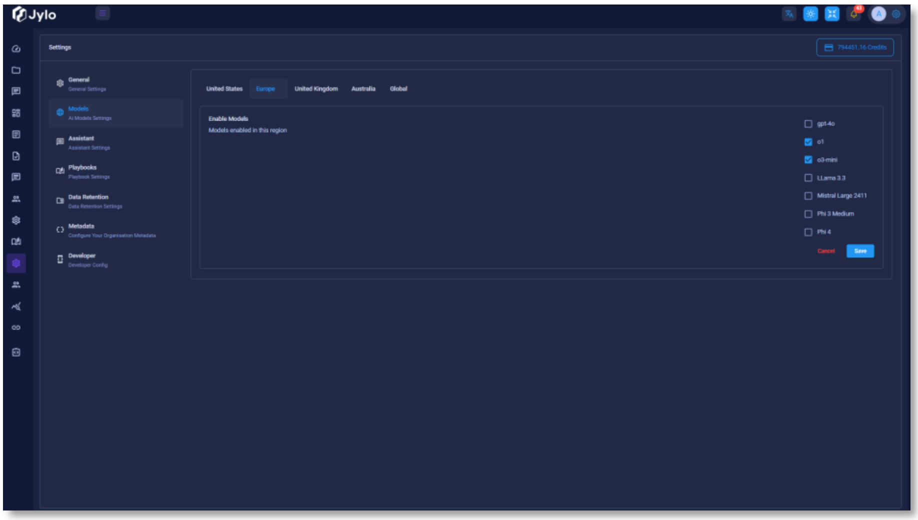
Control AI model availability across geographic regions:

- United States
- Europe
- United Kingdom
- Australia
- Global

Global option provides fastest response by using servers with highest available capacity.

For each region:

- Check or uncheck boxes to enable/disable specific models
- Configure different model sets based on regional requirements



To configure:

1. Go to Admin > Settings > Models

2. Select region tab

3. Check boxes for models to make available

4. Uncheck boxes to restrict models

Available Models

The platform supports several AI language models across regions, including:

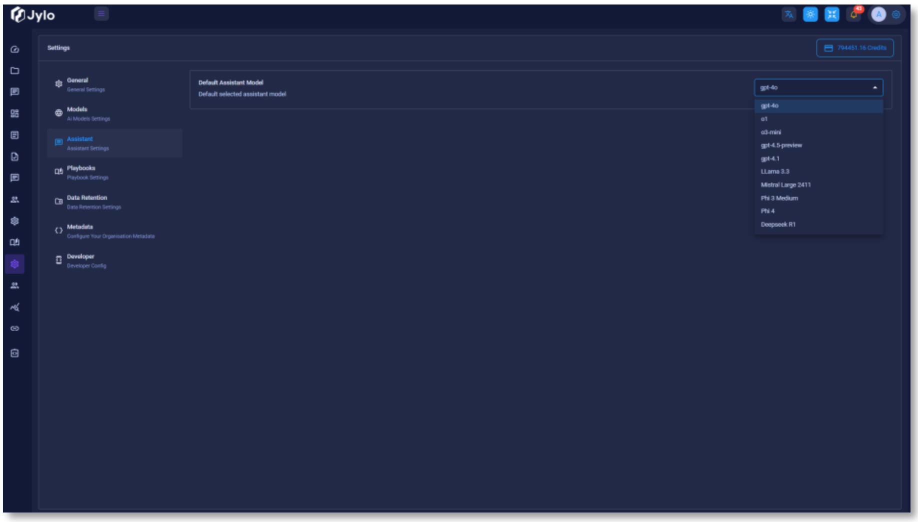
- GPT-4.1: Major advancement on 4o, not available in consumer ChatGPT
- GPT-4o: Advanced model from OpenAI
- o1: High-intelligence reasoning model
- o3-mini: Fast, high-quality reasoning model

- LLama 3.3: Designed for balanced performance
- Mistral Large 2411: Comprehensive reasoning capabilities
- Phi 3 Medium: Cost-efficient model with solid capabilities
- Phi 4: Lightweight, resource-efficient model
- Deepseek R1: Specialised for technical reasoning

This regional configuration ensures that users only have access to appropriate models based on their location and organisational requirements.

9.1.3 Assistant

The Assistant settings allow administrators to configure the default AI language model used across the platform.



The Assistant settings page provides a straightforward configuration option:

- **Default Assistant Model**: Dropdown selector to determine which AI model serves as the default option for Assistant interactions throughout the organisation

To set the default Assistant model:

1. Navigate to Admin > Settings > Assistant

2. Click the dropdown menu beside "Default selected Assistant model"
3. Select the preferred model from the available options

9.1.4 Playbooks

Set the default AI model for Playbook prompts:

1. Go to Admin > Settings > Playbooks
2. Select preferred model from the dropdown menu
3. Changes apply immediately

9.1.5 Data Retention

Configure how long deleted data remains accessible for recovery, including:

- Projects and files
- Assistant chats
- Playbooks and documents
- Flows

To set retention period:

1. Go to Admin > Settings > Data Retention
2. Enter number of weeks in the "Retention Period" field
3. Click "Save"

9.1.6 Metadata

Define structured information fields for clients and Projects.

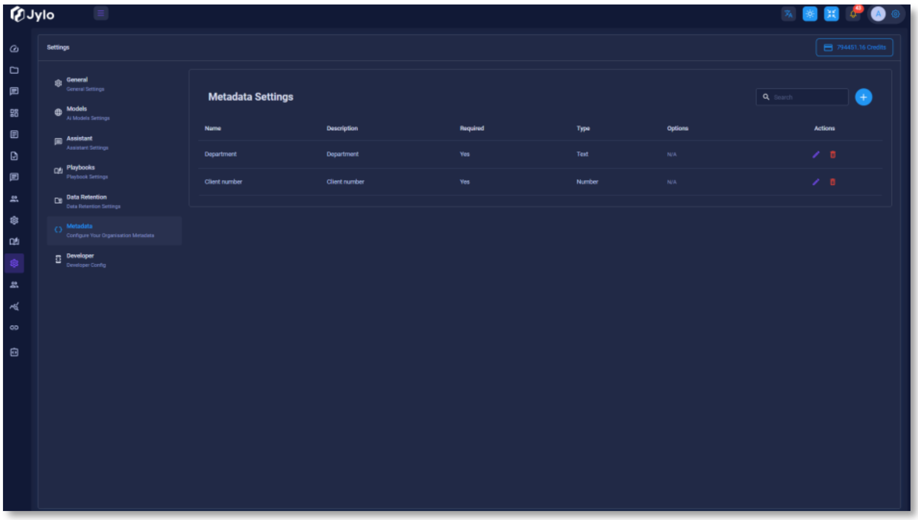
Each metadata field includes:

- Name and Description
- Required Status (Yes/No)
- Field Type (Text, Number, Yes/No, Select, Multiple Select)
- Available Options (for Select types)

To add a new field:

1. Click the blue Plus icon
2. Complete the configuration form
3. Add options for Select field types

Edit fields with pencil icon or delete with trash icon.



9.2 Users

View and manage all users with their roles and usage statistics:

- Name and Email
- Roles (Owner or Default User)
- Usage Statistics:
  - Flows (credits and count)
  - Assistants (credits and count)
  - Total Spend (aggregate credits and jobs)

Use the search bar to find users by name or email.

9.2.1 User Role Management

Two role types available:

- Owner: Full administrative access to all platform features

- Default User: Standard access without administrative capabilities

To assign owner role:

1. Find user in the list
2. Click plus button next to current roles
3. Select owner role and click "Save"

To remove owner role:

1. Click cross button on the owner badge
2. Confirm deletion

Note: Users can have multiple roles. Default User role cannot be removed. New users are automatically added at first login.

9.2.2 Usage Monitoring

Track resource usage with:

- Credit Usage: Cost monitoring (AI tokens converted to currency)
- Activity Metrics: User engagement through Flows and Assistants
- Job Count: Total processing jobs per user

9.3 Projects Analytics

Monitor usage across all Projects:

Projects table displays:

- Project Name (clickable to access directly)
- Assistants (credits and chat count)
- Flows (credits and count)
- Total Cost (overall credits and activity count)

Credit consumption appears in blue, broken down by feature.

9.4 API Management

Create and manage API credentials for external system integration.

API applications table shows:

- Name and Description
- Admin status (Yes/No)
- Client ID and masked Client Secret
- Date Added
- Action buttons

9.4.1 API Credential Management

Action buttons for each API application:

- View Secret (eye icon): Shows full Client Secret with copy option
- Rotate Secret (rotation icon): Generates new Client Secret
- Edit (pencil icon): Modify application settings
- Delete (trash icon): Remove application

Use pagination to navigate multiple pages.

9.4.2 Creating API Applications

To create a new API application:

1. Click the blue plus button in the top-right corner of the API Management page

2. The system launches the "Create API Application" wizard with up to five steps:
   - Step 1: Name
   - Step 2: Admin
   - Step 3: Permissions
   - Step 4: Projects (for non-Admin applications)
   - Step 5: Playbooks (for non-Admin applications)

Step 1: Application Name and Description

In the first step, provide:

- **Application Name**: A descriptive identifier for the integration
- **Application Description**: Additional context about the application's purpose and function

After completing these fields, click "Next" to proceed.

Step 2: Admin Selection

In this step, determine the API application's access level:

- **Admin**: Can access all API Projects and Playbooks with the selected permissions
- **Non-Admin**: Can only access specifically selected Projects and Playbooks

Select the appropriate option based on your integration requirements:

- Choose "Admin" for system-wide integrations that need broad access
- Choose "Non Admin" for more restricted, focused integrations

Click "Next" to continue.

Step 3: Permissions

Select the specific API permissions required for your integration:

- Use checkboxes to select individual permissions
- The interface displays the number of selected permissions at the top

Access Levels:

- **.Read**: View-only access to the specified resource
- **.ReadWrite**: Both view and modify access to the specified resource

- **.Read.All**: View-only access to all instances of a resource type, regardless of ownership
- **.ReadWrite.All**: Full access to all instances of a resource type, regardless of ownership
- **.Send**: Ability to send or transmit specific data types

Special Permission Categories:

- **Internal**: Permissions prefixed with "Internal." typically provide deeper platform access for system integrations
- **Team-related**: Permissions containing "Team" or "Teams" provide access to user management functions
- **Metadata**: Permissions with "Metadata" allow access to configuration rather than content

For example:

- **Projects.Documents.Read**: View documents within Projects the user has access to
- **Playbooks.ReadWrite**: Create, view, and modify playbooks owned by the user
- **Embeddings.Send**: Send requests to generate vector embeddings
- **Projects.Teams.ReadWrite**: Modify access control lists for Projects where the user is an administrator

When selecting permissions, follow the principle of least privilege—grant only the specific permissions required for the integration to function properly.

Step 4: Projects (for Non-Admin applications only)

- A list of all available Projects appears with checkboxes

- Select Projects the API application should have access to
- Use the search field to find specific Projects quickly
- Selected Projects determine what content the API can access
- Click "Next" to continue

Step 5: Playbooks (for Non-Admin applications only)

- A list of all available Playbooks appears with checkboxes
- Select playbooks the API application should have access to
- Use the search field to find specific playbooks quickly
- Selected playbooks determine what analysis workflows the API can use
- Click "Finish" to complete the application creation

After completing all required steps, the API application is created with:

- A unique Client ID automatically generated by the system
- A Client Secret for authentication
- The permissions, Projects, and playbooks configured during creation

9.4.3 Editing API Applications

To modify an existing API application:

1. Click the pencil icon in the Actions column for the application
2. The edit wizard appears with the same steps as creation, pre-populated with current settings
3. Navigate through the steps to make any necessary changes
4. Click "Finish" to save your modifications

9.4.4 Security Considerations

API credentials provide powerful access to your Jylo environment and should be managed with appropriate security precautions:

- Client Secrets should be treated as sensitive information and stored securely
- Rotate secrets periodically using the rotation icon to generate new credentials
- Grant only the minimum permissions necessary for each integration
- Review API application usage regularly to detect anomalies
- Delete unused API applications to reduce potential security exposure

10. Glossary

Term	Definition
Admin	Users with elevated permissions who can configure organisation-wide settings and manage users.
Assistant	Unified AI interaction interface used for conversation and content analysis. Formally called Chat in Jylo 1.0.
Client Secret	Secure authentication key used with Client ID for API authentication.
Conditional Logic	Rules that trigger specific analyses based on document content or previous prompt responses.
Dashboard	The central hub displaying personal Project information and recent activity.
Default User	Standard access role to Jylo features without administrative capabilities.

Evidence	Supporting text in a document that validates AI-generated analyses, accessible via the Evidence button.
Files	Uploaded content for analysis. Formerly called "Documents" in Jylo 1.0.
Prompt	Foundation component of analysis workflow that extracts specific information from documents.
Flow	A structured document analysis process that applies a Playbook to documents.
Folder	Organisational structure for Files and Flows, supporting hierarchical arrangement.
Fuzzy Match	Option in conditional logic that allows for spelling variations or close matches.
Hash-Linking	System for connecting analysis steps using # symbol, allowing references to outputs from prompts.
List of Values	Prompt type that produces multiple categorical items, presented as checkboxes.
Marketplace	Repository containing all available Playbooks that can be applied to documents.
Metadata	Structured information fields about Projects and clients, configured by administrators.
Model	AI language model that powers analysis, with various options available for different tasks.
Owner	Role with full administrative access to all platform features.
Personal Project	Private workspace automatically assigned to each user (if enabled by administrators).

Playbook	Reusable workflow template for document analysis. Formerly called "Products" in Jylo 1.0.
Project	Container for related work, providing organisation and access control for teams.
Range of Values	Prompt type that produces numerical results, presented as a slider control.
Source Documents	Reference materials in Playbooks that can be linked using the @ symbol.
Sub-Prompt	A prompt placed beneath a parent in the prompt tree
Tasks	Feature that allows team members to assign verification responsibilities.
Test Documents	Files used for testing Playbooks during creation.
Verification	Process of approving, modifying, or rejecting AI-generated outputs.
Yes/No Prompt	Binary decision prompt type that produces true/false answers, presented as checkboxes.