



Jylo

Working with Assistant

1. Introduction to Assistant

1.1 What is Assistant?

The Assistant is your AI-powered research companion within Jylo. It provides intuitive conversation-based analysis of documents, enabling you to explore content through natural dialogue rather than structured workflows.

Unlike Flows, which apply predefined Playbooks to documents, the Assistant offers a flexible approach where you can ask questions, request summaries, and extract specific information through conversational prompts.

1.2 When to Use Assistant

The Assistant is particularly valuable when:

- You have general questions
- You want to generate content or plans
- You need quick document insights
- You have specific questions that don't fit neatly into existing Playbooks
- You want to analyse documents using natural language conversation
- You're not yet sure of your analysis goals

The Assistant is designed to complement structured Flows, not replace them. For repetitive, standardised analysis across multiple documents, Playbooks and Flows provide more consistent and efficient results.

2. Assistant Features

2.1 Starting Conversations

To begin using the Assistant:

1. Navigate to the **Projects** section in the sidebar
2. Select your desired Project from the dropdown
3. Click on the **Assistant** option in the Project navigation
4. Click the blue plus button to start a new conversation

Tip: You can also access your personal Assistant directly from the "Me" section of the sidebar. This is useful for quick questions that aren't tied to a specific Project.

2.2 Selecting AI Models

The Assistant supports multiple AI models, each with different capabilities:

1. Click the model dropdown menu in the top-left corner of the Assistant interface
2. Review the available models and their descriptions
3. Select the model that best suits your current needs

Tip: Jylo recommends using o3-mini or Claude 3.7 Sonnet for everyday tasks and GPT4.1 for analysing over 100k words across one or more documents.

For more details of the capabilities of each model hosted on Jylo, see [How do I choose the right AI model in Jyo 2.0?](#)

2.3 Uploading Documents

To analyse specific documents with the Assistant you can either select documents from the files page using the green Open Assistant button or navigate to Assistant and:

1. Click the plus button in the input field
2. Select documents from your Project files
3. Click "Upload" to add the documents to your conversation
4. You can now ask questions specifically about these documents

Note: Only text from image files will be processed by AI.

Tip: When uploading multiple documents, be clear in your questions about which document you're referring to. For example: "Summarise the contract agreement document" or "Compare the requirements in document 1 and document 2."

3. Document Analysis with Assistant

3.1 Citation Verification

When the Assistant analyses documents, it provides citations to support its responses:

1. Citations appear as numbered references at the end of statements
2. Click on a citation number to highlight the corresponding text in the document
3. This allows you to verify the accuracy of the AI's interpretation
4. The highlighted text provides evidence for the Assistant's claims

Citations are crucial for verification—always check them to ensure the AI has interpreted the document correctly, particularly for important or complex analysis.

3.2 Working with Responses

The Assistant provides comprehensive responses to your queries. To get the most value:

1. Review answers thoroughly, paying attention to any uncertainties the AI expresses
2. Click citations to verify information directly from source documents
3. Ask follow-up questions to clarify points or explore topics in more depth

Tip: Make finding valuable conversations easy by deleting redundant chats.

4. Best Practices

4.1 Effective Prompting Techniques

The quality of responses depends significantly on how you frame your questions:

- **Be specific:** "What are the payment terms in this contract?" works better than "Tell me about this contract."
- **Request formats:** Specify the format you want, e.g., "List the key requirements in bullet points."
- **Break down complex questions:** Ask multiple focused questions rather than one complex query.
- **Use follow-ups:** "Could you elaborate on point 3?" helps refine initial responses.

4.3 Common Use Cases

The Assistant excels in various scenarios:

- **Document summarisation:** "Provide a 3-paragraph summary of this report."
- **Information extraction:** "What are all the dates mentioned in this email chain?"
- **Comparison analysis:** "What are the key differences between these two contracts?"
- **Risk identification:** "Identify potential risks or concerns in this agreement."
- **Language translation:** "Translate this paragraph into French."

- **Suggestions:** "Provide three responses to this email, casual, formal and direct."

Remember that while the Assistant is powerful, it's designed to complement human expertise, not replace it. Always review and verify important information before making decisions based on AI analysis.