



Jylo

Using Flows

1. Flow Fundamentals

1.1 What are Flows?

Flows are a structured approach to document analysis that combines powerful AI with human verification. A Flow applies a Playbook to your documents, enabling consistent analysis across multiple files whilst maintaining quality through human oversight.

Flows help you:

- Process multiple documents using consistent analysis parameters
- Filter documents based on specific criteria identified by AI
- Verify and refine AI outputs with human expertise
- Export structured results for reporting and decision-making

1.2 How Flows Work with Playbooks

Flows and Playbooks work together as a powerful document analysis system:

- **Playbooks** define the analytical framework and questions to apply to your documents
- **Flows** execute these frameworks on specific documents and capture verification results

Think of Playbooks as reusable templates and Flows as specific instances where those templates are applied. The Playbook provides the structure, while the Flow delivers actionable insights from your documents with human verification.

2. Creating and Managing Flows

2.1 Starting a New Flow

To create 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
4. Complete the three-step wizard:
 - **Step 1 – Name:** Enter a descriptive title and optional description
 - **Step 2 – Playbook:** Select the appropriate Playbook for your analysis
 - **Step 3 – Documents:** Choose documents from your Project files
5. Click "**Finish**" to launch the Flow

Tip: Create a naming convention for your Flows (e.g., "[Client]-[Document Type]-[Date]") to make them instantly recognisable and searchable.

2.2 Understanding the Flow Interface

The Flow interface consists of three integrated panels that work together seamlessly:

Left Panel – Filters and Document Selection

- Contains interactive filter controls derived from your Playbook:
 - Checkboxes for Yes/No and List prompts (e.g., "Contains confidentiality clause")
 - Sliders for numerical ranges (e.g., "Risk score between 1-10")
- Use these controls to quickly identify documents matching specific criteria

Middle Panel – Document View

- Displays the current document with an intelligent highlighting system
- Automatically highlights relevant text when evidence is selected
- Enables side-by-side review of documents and AI analysis

Right Panel – Responses

- Shows AI-generated responses with verification status indicators
- Features "Evidence" buttons that link answers to supporting document text
- Includes threaded comments for team discussion
- Provides verification controls (approve/reject/edit) for each answer

3. Working with Flow Results

3.1 Document Filtering and Navigation

The intelligent filtering system helps you find exactly what you need:

1. Select criteria using the filter controls (e.g., check "Contains confidentiality clause")
2. The "Filtered Documents" section instantly updates to show only matching documents
3. Click any document in the filtered list to examine it in detail

This powerful feature lets you quickly identify documents with specific characteristics—like finding all contracts with renewal clauses or all emails mentioning a particular subject—saving hours of manual review.

3.2 Verification Process

Human verification ensures accuracy and maintains quality control:

1. Examine each AI-generated answer in the right panel
2. Click "Evidence" to see the relevant text highlighted in the document
3. Apply your expertise to assess the AI's response
4. Use the intuitive verification controls:
 - ✓ Approve accurate answers with a single click

- X Reject incorrect answers
- Edit answers directly when partial corrections are needed:
 - Yes/No: Toggle between options
 - Range: Adjust numerical values
 - List: Add or remove items as needed

Best Practice: Check the highlighted evidence before verification to ensure responses are accurate and properly supported by the document text.

Tip: If AI has failed to find supporting evidence you can copy it from the document and add it to the evidence field. It will then be highlighted in the document when users hit the evidence button.

3.3 Managing Tasks

Streamline team collaboration with the Tasks feature:

1. Access Tasks via the dedicated button in the Flow interface
2. Click the pen icon next to any prompt requiring specialist review
3. Assign the appropriate team member from the dropdown
4. Save your assignment
5. Assignees receive automatic notifications

This feature is perfect for distributing work efficiently or routing specific questions to subject matter experts like legal reviewers, compliance officers, or finance specialists.

3.4 Exporting Results

Transform your verified analysis into actionable deliverables:

1. Click the download icon in the responses panel
2. Choose from four powerful export options:
 - **Export Spreadsheet:** Comprehensive tabular data for analysis

- **Export with source documents:** Complete package with original files
- **Generate flow assembly:** a bespoke report of the dataset designed by the playbook builder
- **Generate document assembly:** a custom report based on the results from the document selected in the flow UI

4. Summary

Flows sit at the heart of Jylo's document analysis ecosystem, combining AI efficiency with human judgment. By following this guide, you'll create streamlined document review processes that maintain exceptional quality through verification whilst reducing review time by up to 80% compared to traditional methods.

Ready to take your document analysis to the next level? Learn how to create custom Playbooks tailored to your specific needs by consulting the "Understanding Playbooks" guide.