Jylo

User Guide

A Guide for Jylo Users

Version 2.3.13

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Introduction

Jylo is an Artificial Intelligence (AI) platform designed to couple human expertise with AI to automate complex workflows. It allows you to analyse anything from a single document to a vast dataset with your own tailored methodology. This guide will help you understand and use the key features of the Jylo platform.

Core Principles

- **Project Centricity:** Jylo stores all AI work in Projects, enabling efficient sharing and archiving across teams.
- **End-to-End Automation:** You can templatise your workflows inside a Playbook and have AI execute them from start to finish in a Flow.
- **Verification Workflow:** The built-in verification system enables quick approval of AI outputs whilst maintaining quality control.
- **Multi-Model Support:** Jylo is compatible with a selection of major language models, each with a unique skillset.
- **Compliant Chat:** The platform provides secure access to AI models whilst protecting intellectual property. All interactions occur within a controlled environment that prevents sensitive data from being used to train AI models.

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 whilst enabling necessary collaboration.

Navigation and Interface

The Jylo interface is divided into three sections:

- **User Controls:** Preferences, notifications and account controls displayed in the bar at the top of the platform.
- **Sidebar:** The left-hand navigation menu containing all main features.
- **Content Area:** The active workspace that changes based on your current selection.

User Controls

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

- **Supported Languages:** English, Français, 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 notification count.
- **User Profile:** Access your profile via the profile icon in the top-right corner. From here you can:
    - View your profile information
    - Access the Jylo feedback portal
    - Contact support
    - Set your preference prompt
    - Log out

User Preference Prompt Templates

The User Preference Prompt feature allows you to customise how the Assistant responds to your questions across all conversations. Jylo provides five pre-built persona templates for instant customisation, or you can write a custom prompt.

Setting Your Preference

To apply a template or create a custom preference:

1. Click your **profile icon** in the top-right corner.
2. Select **Edit User Preference Prompt**.
3. Expand **Choose from Output Style Templates** to view the five pre-built options.
4. Select your preferred template, or write a custom prompt in the text field.
5. Click **Update Prompt** to save your preference.

Your selected preference applies automatically to every Assistant conversation across all Projects. You can change or remove your preference at any time by following the same steps.

Sidebar Menu

The sidebar menu provides access to all major areas of the Jylo platform. The navigation is organised into five sections:

Overview

- **Dashboard:** The central hub displaying your Project information, recent activity and support materials.

Me

- **My Projects:** A centralised repository where you can create a new Project or view existing ones.
- **My Assistant:** Direct access to your personal AI Assistant from anywhere in the platform.

Projects

When you select a Project from the dropdown menu, the Projects section expands to reveal six components:

- **Overview:** Project-specific Dashboard showing activity information and metrics.
- **Files:** Document management system for uploading, organising and accessing all Project-related documents.
- **Flows:** Structured document analysis area where Playbooks are 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

> **Note**
>
> The Admin section is visible only to users with administrator privileges.

- **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.

- **Developer:** External API documentation portal with integration guides and endpoint references for technical teams building custom applications.

Version Information

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

Projects

All activities in Jylo happen inside a Project. You are assigned a personal Project upon account creation but can create and be added to other Projects. Each Project contains the following pages: Overview, Files, Flows, Assistant, Team and Settings.

Creating a New Project

To create a new Project:

1. Navigate to the **My Projects** page.
2. Click the **Plus** button.
3. In the **Create Project** dialog, complete the two-step process:

Step 1: Project Details

a. Enter a clear, descriptive **Project Name**.
b. Provide a **Project Description** with additional context about the Project's purpose or scope.
c. Click **Next** to proceed to metadata settings.

Step 2: Metadata Settings

a. Complete all fields under **Required Metadata Settings**.
b. Optionally complete fields under **Available Metadata Settings**.
c. Click **Back** to return to Project Details if needed.
d. Click **Finish** to create the Project.

After completing both steps, you will be automatically directed to the Project's Overview page.

> **Note**
> The specific metadata fields you see during Project creation are configured by your organisation's administrator. Required fields must be completed before the Project can be created.

Project Overview

The Overview page features four tiles displaying the total count of Assistants, Files, Flows and Team Members. These act as shortcuts to the associated pages. Beneath is a Latest Project Activity feed showing recent actions taken within the Project.

Files

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

Navigation Structure

- **Folder Navigation Panel:** Located on the left side, this 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 with clickable links to navigate up the folder tree.

File Search

Use the search bar at the top of the Files section to find documents by filename within your Project. Enter a full or partial filename to filter the file list to matching results.

File Management

The Files section provides several tools for managing your documents:

- **Open/Preview:** View the file.
- **Processing Settings:** Displays OCR and citation configuration statuses.
- **Rename:** Update file names.
- **Download:** Save the file locally to your device.
- **Open in Assistant:** Select files and initiate interaction with the Project Assistant.
- **Move:** Relocate files and folders to different locations within the Project.
- **Re-index:** Process documents again to reconfigure OCR and citation settings.
- **Delete:** Remove files from the Project.

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, add files in one of two ways:
    a. **Drag and Drop:** Drag files directly from your computer into the dotted upload area.
    b. **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 **Advanced** to configure upload settings:
    a. **Text recognition:** Toggle OCR on or off.
    b. **Text recognition quality:** Set OCR quality.
    c. **Citation engine:** Choose whether the document is processed to return citations.

> **Tip**
>
> Turning OCR or citation engines off will increase upload speed. This can be useful when uploading large batches of documents that do not require these features.

Moving Files and Folders

You can reorganise your Project's file structure by moving files, folders and all their contents to different locations.

> **Warning**
>
> Moving a folder will relocate all its contents, including subfolders and files. The items will be removed from their original location and placed in the new folder.

To move items within your Project:

1. Tick the checkbox next to each file or folder you wish to move. You can select multiple items simultaneously. Selecting a folder will move that folder and all its sub-level content.
2. Click the **Move** button that appears once items are selected.
3. In the folder selection dialog, navigate to your desired destination folder. You can select an existing folder or create a new one.
4. Click **Move** to confirm. The items will be removed from their original location and placed in the new folder.

Upload Report Summary

Upload reports are available via the **View Project Uploads** button at the top of the Files page. Each upload report provides detailed information about the processing status and results of your document uploads.

To view upload reports:

1. Navigate to the **Files** section.
2. Click **View Project Uploads** in the top toolbar.
3. Select a specific upload from the list to view its detailed report.

Overview

The Overview page of each upload report is divided into four main sections:

Basic Information

This section displays core details about the upload:

- **Upload Status:** Current state of the upload (e.g. Completed).
- **Processing Status:** Current state of document processing (e.g. Completed).
- **Total Size:** Combined size of all uploaded files.
- **Upload Date:** Date and time when files were uploaded.
- **Completion Date:** Date and time when processing finished.
- **Uploaded By:** Name of the user who performed the upload.

Upload Statistics

A summary showing:

- **Total Documents:** The total number of files in this upload batch.
- **Completed Documents:** Number of successfully processed files (displayed with a green badge).
- **Processing Documents:** Number of files currently being processed (displayed with a yellow badge).
- **Failed Documents:** Number of files that encountered errors during processing (displayed with a red badge).

File Type Distribution

A pie chart displaying the count of each file type uploaded.

Failure Reasons

A pie chart displaying the count of each failure type.

Upload Files

The Upload Files page contains a table with rows for each file uploaded to the Project and columns for upload status, path (folder location), size and date added.

Use the search and filter options above the table to navigate files. Filter options represent upload status: All, Successful, Pending and Failed.

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)

> **Note**
>
> Only .PNG and .JPEG files are processed using image recognition capabilities. All files remain securely stored within your Project and are only accessible to Team members.

Assistant Shortcut

The Files page allows you to select documents for analysis using the Assistant. You can either:

- Select multiple documents by clicking the checkboxes, then click **Chat with Selected Documents**.
- Click the **Open in Assistant** button on an individual file.

Flows

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

Creating and Launching a Flow

Creating a new Flow follows a structured three-step workflow that guides you through naming your Flow, selecting a Playbook and choosing documents 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 steps: Name, Playbook and Documents.

In the first step, provide:

- **Flow Name:** A descriptive title for your Flow.
- **Flow Description:** Optional additional context about the Flow's purpose.

Click **Next** to proceed to Playbook selection.

Step 2: Playbook Selection

In the second step, choose a Playbook to apply to your documents. Once you are satisfied with your chosen Playbook, click **Next** 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 have selected all required documents, click **Finish** to launch the Flow.

> **Tip**
>
> Flows can be terminated before completion by pressing the stop button beside the Flow in the Flows list.

Flow Interface

After completing the setup wizard, Jylo begins processing your Flow. Once processing is complete, the Flow interface 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 Yes/No and List of Values 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.
- Provides **Evidence** buttons that highlight supporting text in the document for relevant question types.
- Includes comment sections for each response.
- Shows verification controls.

Working with Flows

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

Document Filtering and Navigation

- The filtered Documents section displays only documents that match your selected criteria.
- Click any document in the filtered list to view it in the document panel.
- Send filtered documents to a new Project folder:

1. Filter to the desired documents.
2. Click the **Move Documents** button at the bottom of the file list.
3. Select an existing folder or create a new one.
4. Click **Save** to move the files.

> **Note**
> Moving documents will remove them from their existing location and place them in the chosen folder.

Evidence and Verification

Approve or reject responses using the checkmark or cross icons. For editable responses:

- **Yes/No:** Select the appropriate radio button.
- **Range:** Edit the value in the input field.

- **List:** Remove items with the trash icon or add via **Add new category**.

Click **Evidence** to highlight supporting text in the document.

Comments and Collaboration

For each response:

1. Click **Show Comments** to expand the comments section.
2. Enter your feedback in the comment field and click **Comment**.

Exporting Results

The Flow interface provides several options to export your analysis results. Click the **download icon** in the top-right corner of the responses panel to access 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.
- **Export Spreadsheet with Source Documents:** Includes both the analysis results with all user modifications and the original documents in the export.
- **Generate Flow Assembly:** Creates a Word document incorporating responses from the selected document based on the Assembly template defined in the Playbook.
- **Generate Document Assembly:** Creates a Word document incorporating responses from across the dataset based on the template defined in the Playbook.

Large Flow Exports

For Flows with large data volumes, Excel exports are processed in the background to avoid delays in the Flow interface. When a large export is requested, an export dialogue will appear notifying you that the file is being prepared.

The export dialogue displays the file creation status, allowing you to continue working in the Flow interface whilst the export is prepared.

Tasks

The Tasks page allows you to direct Team members to a particular output and is accessible via the **Tasks** button in the top right of 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.

You can edit the assignee using the same process or view Tasks via the **View** button. Team members will be notified after being assigned a Task.

Assistant

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

Documents can be uploaded before or during sessions. To upload documents:

1. Click the **Plus** icon below the text field.
2. Select Project files or upload directly from your device.
3. Click **Save** before engaging with the documents in the chat.

> **Note**
> Files uploaded from your device are saved in the Assistant folder inside the Project's Files section.

Documents appear in the document viewer with links to text supporting the AI response.

Comparison

The Assistant offers a redline comparison capable of comparing two .docx files. To use the comparison tool:

1. Upload two .docx files.
2. Click the **Tools** button below the text field.
3. Select **Compare Documents**.
4. Click the document comparison file in the chat thread to view the redline.
5. Chat with the Assistant to interrogate the analysis.

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.

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

Exporting Chats

Full Conversation Export

Export the entire conversation thread to PDF by clicking the **download** button in the top-left corner of the Assistant interface.

Individual Message Export

Any individual Assistant message can be exported directly to Word, Email, Excel or PDF using the **Export** button displayed beneath each message.

To export an individual message:

1. Locate the message you wish to export.
2. Click the **Export** button beneath the message.
3. Select your preferred format: Word, Email, Excel or PDF.

The message content will be prepared in your chosen format for download or use.

Team

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.

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** and **Team members**.
3. In the **Available users** column, use the search bar to find specific users by name.
4. Select users by checking the boxes next to their names.
5. Click the **right arrow** button between the columns to move selected users to the **Team members** list.
6. Review your selections. If needed, remove users by selecting them and clicking the **left arrow** button.
7. Click **Save** 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.

Modifying Roles

Project Admins can modify the permissions of Team members:

1. Locate the user whose role you wish to modify in the Team list.
2. Click the **pencil icon** in the **Actions** column.
3. Select the appropriate role from the dropdown menu.

Role Permissions

Admin users can add or remove Team members, change user roles and modify Project settings. User-level members have access to all other Project features.

Removing Team Members

Admins can remove users from a Project by clicking the **trash icon** in the **Actions** column.

Settings

The Settings section provides tools for configuring your Project's basic information and metadata. The interface is divided into two 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.

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 **Project** in the left sidebar of the Settings page.
2. Enter or modify the **Project Name** and **Project Description** fields.
3. Click **Save Changes** to apply your modifications.

Delete

To delete the Project, click the **Delete Project** button and confirm via the **Yes** button in the pop-up.

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 fields are configured by your organisation's administrator and are completed on Project creation.

To make changes to the Project metadata:

1. Click **Metadata** in the left sidebar of the Settings page.
2. Modify the required fields.
3. Add additional metadata if necessary.

Changes save automatically and display a green verification timestamp.

Marketplace

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

Managing Playbooks

Importing Playbooks

To import a Playbook:

1. Click the blue **Import Playbook** button.
2. In the import dialog, either drag and drop a Playbook zip file into the designated area, or click **browse** to select from file explorer.
3. The imported Playbook will appear in your Marketplace collection.

Exporting Playbooks

To export a Playbook:

1. Select a Playbook from the grid.
2. Click the **download icon** in the Playbook overview tile.
3. 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, descriptions and expected Assembly document categories.

With builder access, you can:

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

Filtering Playbooks

If your organisation has configured Playbook metadata fields, the Marketplace displays a **Filter** button that allows you to narrow the Playbook list by metadata values such as department, industry or purpose.

Creating a New Playbook

Creating a Playbook follows six steps:

1. Metadata
2. Prompts
3. Outputs
4. Testing
5. Access Control

6. Summary

Metadata

Provide details to make the Playbook identifiable in the Marketplace and categorise it using your organisation's metadata fields.

1. Click the blue **Plus** button in the Playbooks Marketplace.
2. Enter a **Name** and **Description** for your Playbook.
3. Complete all fields under **Required Metadata Settings**.
4. Optionally complete fields under **Available Metadata Settings**.
5. Click **Save And Continue**.

> **Note**
> The Name and Description appear to users browsing the Marketplace. Metadata fields are used for filtering and categorisation.

Prompts

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

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).

Creating a Prompt

1. Click **Add Prompt** in the left panel.
2. Complete the prompt configuration form with:
    a. **Heading:** Descriptive identifier.
    b. **Description:** Explanation of the prompt's purpose.
    c. **Question:** Prompt text applied to documents.
    d. **Answer Type:** Select from Yes/No, Text, List of Values, Range of Values or Generative.
    e. **Model:** Choose the AI model to process this prompt.

Answer Types and Their Applications

Filtering-capable types (can analyse content and filter documents):

- **Yes/No:** For binary decisions (presented as checkboxes).
- **List of Values:** For multiple categorical items (presented as checkboxes).
- **Range of Values:** For numerical results (presented as a slider control).

- **Date:** Identify a date value (presented as a calendar).

Analysis-only types:

- **Text:** For a short string response.
- **Generative:** For long-form outputs.

Managing Documents

- Toggle between the **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.

Sub-prompts and Conditional Logic

Creating Sub-prompts

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

Setting Up Prompt Conditions

1. Select a prompt or sub-prompt that should be conditionally triggered.
2. Scroll to the **Prompt Conditions** section at the bottom of the form.
3. Click **Add Condition** to open the condition modal.
4. From the dropdown list, select the prompt that will trigger this condition.
5. 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.
- 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 Date Prompts:

- Select an operator from the dropdown menu: On, Before, After or Range.
- Enter the expected date in the **Expected Date** field using the calendar.
- For the Range operator, enter both start and end dates.
- Click **Add Condition** to save.

> **Important**
> All prompt types except Generative and Text can be used as condition triggers. Conditions appear in a table at the bottom of the prompt configuration. You can delete conditions by clicking the trash icon next to each one.

Outputs

The Outputs step enables you to transform Flow analysis results into professional, formatted reports. Jylo provides two approaches for creating output templates:

- **Outputs (Basic):** Use Jylo's online document editor for straightforward template creation.
- **Outputs (Advanced):** Build templates in Microsoft Word with enhanced formatting control and branding preservation.

Both approaches support two output types:

- **Flow Assembly:** Creates one consolidated report combining data from all documents in your Flow.
- **Document Assembly:** Creates individual reports for each document in your Flow.

Outputs (Basic)

Use Jylo's online document editor to create templates with prompt references.

Creating Your Template

1. Navigate to the **Outputs** step in your Playbook.
2. Select **Outputs (Basic)**.
3. Choose your output type: **Flow Assembly** for consolidated reports, or **Document Assembly** for individual document reports.
4. Use the document editor to structure your template.
5. Insert AI responses by pressing the **#** button to bring up a menu of prompts.
6. Select the prompt you wish to reference.
7. Choose the components you wish to inject from the list.

Flow Assembly Options

When building a Flow Assembly, you can display information in several formats:

- **List As. Table:** Creates a table showing responses from all documents.

- **List As. Bullet List:** Displays responses as bullet points.
- **List As. Numbered List:** Shows responses in numbered format.
- **List As. Paragraphs:** Presents responses as flowing text.

Document Assembly Options

When building a Document Assembly, reference prompts using the # notation to insert responses from the currently selected document.

Example Notation

- Flow Assembly: **#Ethical Breach Rating. List As. Table** — creates a table showing responses from every document in the Flow.
- Document Assembly: **#Key Risks. Answer. List As. Bullet List** — shows key risks from the currently selected document as a bullet list.

Outputs (Advanced)

Build templates directly in Microsoft Word with full formatting control and organisational branding preservation.

> **Note**
>
> Outputs (Advanced) requires the Jylo Word Add-In to be deployed by your Microsoft 365 administrator.

Key Benefits

- **Familiar Interface:** Work in Microsoft Word with native formatting tools.
- **Preserve Branding:** Retain exact formatting, fonts and letterhead styling from your organisation's templates.
- **Intuitive Workflow:** Insert prompt references via sidebar search rather than manual # notation.
- **Multiple Templates:** Generate multiple Word documents from a single Playbook (e.g. an executive summary and a detailed report).

> **Tip**
>
> You can create multiple output templates within a single Playbook. For example, combine a Flow Assembly for a summary report with a Document Assembly for individual document reports.

How to Use Outputs (Advanced)

1. Navigate to the **Outputs** step in your Playbook.
2. Select **Outputs (Advanced)**.
3. Upload your Word template(s) using the document picker.
4. Click **Edit** to open the template in Microsoft Word.

5. Use the Jylo sidebar in Word to search for and insert prompt references anywhere in your document.
6. Save your template—formatting and branding are preserved automatically.

Your template is now ready to generate formatted outputs when the Playbook is deployed in Flows.

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. Enter a name and description for your test Flow.
4. Select from your uploaded test documents.
5. Click **Create** to generate the test Flow.

Launch Flows from inside folders to organise your tests.

Access Control

Configure who can use and modify your Playbook.

Access Configuration Interface

- A list of all users in the organisation is displayed.
- Each user has permission checkboxes next to their name.
- Toggle **Show only assigned users** to filter the view.

Setting Organisation-Wide Availability

1. Locate the **Organisation wide** toggle at the top of the screen.
2. Toggle **ON** to make the Playbook available to everyone.
3. Toggle **OFF** to restrict access to specifically assigned users.

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 cannot view or edit internal information such as headers and prompts.

After configuring all user permissions, click **Next** to proceed. You can return to this step later if you need to adjust permissions.

Summary

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

1. Review the Playbook name and description.
2. Upload a Playbook icon.
3. Review the list of all prompts and their descriptions. This is what users will see when browsing the Playbook in the Marketplace.
4. 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.

Admin

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

Settings

The Settings section provides platform-wide configuration tools.

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.

Models

Control AI model availability across geographic regions:

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

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

For each region, check or uncheck boxes to enable or disable specific models. Configure different model sets based on regional requirements.

To configure model availability:

1. Navigate to **Admin > Settings > Models**.

2. Select the region tab.
3. Check boxes for models to make available; uncheck boxes to restrict models.

Available Models

The platform supports several AI language models across regions:

OpenAI Models (Microsoft Azure)

- **GPT-5:** OpenAI's most advanced model with enhanced reasoning and multimodal capabilities.
- **GPT-4.1:** Major advancement on 4o with the largest context window available on Jylo. Not available in consumer ChatGPT.
- **GPT-4o:** Advanced model from OpenAI.
- **o3:** High-intelligence reasoning model.
- **o4-mini:** High-quality reasoning model minimised for speed.

Anthropic Models (Amazon AWS)

- **Claude Haiku 4.5:** Lightweight Anthropic model optimised for speed and efficiency.
- **Claude Sonnet 4.5:** Balanced Anthropic model combining performance with capability.
- **Claude Sonnet 4.6:** Enhanced Anthropic model with improved reasoning.
- **Claude Opus 4.6:** Anthropic's most advanced model with comprehensive reasoning capabilities.

> **Note**
>
> Anthropic Claude models are hosted on Amazon Web Services and are subject to regional availability.

Open-Source Models (Microsoft Azure)

- **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.

> **Tip**
>
> For up-to-date model recommendations, visit our article
>
> *How do I choose the right AI model in Jylo?*
>
> on the Jylo support site.

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

Assistant

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

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.

Playbooks

Set the default AI model for Playbook prompts:

1. Navigate to **Admin** > **Settings** > **Playbooks**.
2. Select your preferred model from the dropdown menu.

Changes apply immediately.

Data Retention

Configure how long deleted data remains accessible for recovery, including Projects and files, Assistant chats, Playbooks, documents and Flows.

To set the retention period:

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

Integrations

Enable integration with third-party platforms. Contact Jylo Support at support@jylo.ai to complete the setup. Once the setup is complete, integrations can be toggled on or off from the interface.

To activate an integration:

1. Navigate to **Admin** > **Settings** > **Integrations**.
2. Locate the name of the product to integrate.
3. Click the associated **toggle** button.

Organisation Logo

Upload your organisation logo:

1. Navigate to **Admin** > **Settings** > **Organisation Logo**.
2. Click **Upload Image** next to the desired mode.
3. Select an image from file explorer.
4. Click **Upload File**.

> **Note**
>
> Supported formats: PNG, JPG, SVG. Maximum size: 2MB.

Upload Settings

The Upload Settings section allows administrators to configure default file upload behaviour across the organisation. These settings optimise document processing performance and control costs.

Configuration Options

Administrators can configure three key processing options that apply by default to all file uploads:

OCR Strategy

Controls when Optical Character Recognition (OCR) is applied to uploaded documents:

- **Never:** Documents are processed without text extraction, suitable for files with existing text layers.
- **Always:** All documents undergo OCR processing, ensuring text extraction even from scanned images or PDFs.

OCR Engine

Determines the quality level of text extraction, with direct impact on processing costs:

- **Standard:** Faster processing with lower accuracy, suitable for high-volume uploads of clear documents.
- **Premium:** Slower processing with higher accuracy, recommended for complex documents or critical text extraction.

Citation Engine

Controls whether coordinate extraction is enabled for document citations:

- **Enabled:** Documents are processed to support the Evidence feature, allowing precise text highlighting when AI references source material.
- **Disabled:** Citation coordinates are not extracted, reducing processing time and costs when Evidence functionality is not required.

Setting Default Upload Behaviour

To configure organisation-wide upload defaults:

1. Navigate to **Admin** > **Settings** > **Upload Settings**.
2. Select your preferred option for each of the three settings: OCR Strategy, OCR Engine and Citation Engine.
3. Click **Save** to apply the changes.

> **Important**

> These settings establish organisation-wide defaults but do not restrict individual users from overriding them during file upload.

Project Metadata Settings

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 the **pencil icon** or delete with the **trash icon**.

Playbook Metadata Settings

Define custom metadata fields for Playbooks across your organisation. The Playbook Metadata Settings interface displays a table of configured fields with columns for Name, Description, Required status, Type, Options and Actions.

Each Playbook metadata field includes:

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

Adding Playbook Metadata Fields

To add a new Playbook metadata field:

6. Navigate to **Admin > Settings > Playbook Metadata Settings**.
7. Click the blue **Plus** button.
8. Enter a **Name** and **Description** for the field.
9. Set whether the field is required using the toggle.
10. Select the **Field Type** from the dropdown: Yes/No, Number, Text, Select or Multiselect.
11. Add options if the field type is Select or Multiselect.
12. Click the **Save** icon to confirm.

Once configured, Playbook builders can populate these metadata fields on the Playbook Metadata step during creation or editing. Fields marked as required appear under Required Metadata Settings, whilst optional fields appear under Available Metadata Settings.

Marketplace users can then use the **Filter** tools in the Marketplace to drill down into relevant Playbooks using these fields.

Edit existing fields using the **pencil icon** or delete with the **trash icon**.

Analytics

The Analytics section provides comprehensive monitoring and reporting across all platform activities. Administrators can track resource consumption, user engagement and system performance through four dashboards.

Navigate to **Admin > Analytics** and select from four analytics dashboards:

- **Users:** Individual user activity, roles and resource consumption.
- **Projects:** Project-level usage and costs.
- **Assistants:** Assistant conversation metrics across all Projects.
- **Playbooks:** Playbook usage statistics and deployment data.

Users

The Users analytics page displays comprehensive data on all users within your organisation, including their roles, permissions and platform usage.

Columns Displayed

- **Name:** User's full name (editable via pencil icon).
- **Email:** User's email address.
- **Role:** Assigned permission levels (Owner, Default User or both).
- **Flows:** Total number of Flows created by the user.
- **Flow Credits:** Total credits consumed by Flows.
- **Assistants:** Total number of Assistant conversations created.
- **Assistant Credits:** Total credits consumed by Assistant usage.
- **Total Credits:** Combined credits across all platform activities.
- **Logins Count:** Number of times the user has logged into the platform.
- **Created At:** Date when the user account was created.
- **Last Login:** Date when the user last logged into the platform.

User Role Management

Jylo provides two role types that determine user permissions:

- **Owner:** Full administrative access to all platform features, including Settings, Analytics, API Management and user administration.

- **Default User:** Standard access to Projects, Playbooks, Flows and Assistant features without administrative capabilities.

> **Important**
> The Default User role cannot be removed—all users must maintain standard platform access.

Assigning the Owner Role

To grant administrative access to a user:

1. Locate the user in the analytics table.
2. Click the **pen** button next to their name.
3. Select the **Role** tab.
4. Choose **Owner** from the role options.
5. Click **Save** to confirm.

The Owner badge will appear alongside their existing Default User role.

Removing the Owner Role

To revoke administrative access:

1. Locate the user with the Owner role.
2. Click the **cross** button on the Owner badge.
3. Confirm the removal.

Searching and Filtering

Use the search bar at the top of the page to find users by name or email. Click column headers to sort data by any metric. Filter by role, activity level or date range.

Exporting Data

To export user analytics:

1. Apply any desired filters or search criteria.
2. Click the **Export** button in the top-right corner.

The exported Excel file includes all visible data with detailed breakdowns.

Projects

The Projects analytics page provides usage monitoring across all Projects within your organisation.

Columns Displayed

- **Name:** Project identifier (clickable link to access the Project directly).
- **Owner:** User who created or currently owns the Project.
- **Date Added:** When the Project was created.

- **Assistants:** Total number of Assistant conversations within the Project.
- **Assistant Credits:** Total credits consumed by Assistant usage.
- **Flows:** Total number of Flows created in the Project.
- **Flow Credits:** Total credits consumed by Flows.
- **Total Credits:** Combined credits across all Project activities.
- **Status:** Current Project status (Active, Archived, etc.).

Click any Project name to navigate directly to that Project's Overview page.

Searching and Filtering

Use the search bar to find specific Projects by name. Filter results by owner, date range or activity type. Sort by any column to prioritise analysis.

Exporting Data

To export Project analytics:

1. Configure any desired filters or search criteria.
2. Click the **Export** button in the top-right corner.

The exported Excel file includes all visible data with detailed cost breakdowns.

Assistants

The Assistants analytics Dashboard provides detailed metrics on AI conversations across all Projects in your organisation.

Columns Displayed

- **ID:** Unique Chat ID identifier (replaces chat names for privacy protection).
- **Owner:** User who created the Assistant conversation.
- **Date Added:** When the conversation was created.
- **Date Modified:** Most recent activity timestamp.
- **Documents:** Number of files uploaded to the conversation.
- **Total Documents:** Combined file size of uploaded documents (e.g. 3.95 MB).
- **Prompts:** Total number of messages sent in the conversation.
- **Estimated Token Count:** Estimated AI token usage.
- **Total Credits:** Total cost of the conversation.
- **Users:** Contributors to the conversation (clickable names shown in blue).
- **Status:** Current conversation status.
- **Project:** Column showing which Project contains the conversation.

Privacy Protection

Assistant Analytics implements a privacy-first design to protect sensitive information:

- **Chat IDs replace chat names:** Individual conversation titles are replaced by unique identifiers to prevent sensitive topics from being visible at a glance.

- **Positive action required:** Administrators can see Project names and user lists but must click into the Project to view conversation content.
- **Controlled access:** This prevents inadvertent exposure of confidential discussions whilst maintaining administrative oversight.

Searching and Filtering

Search by Chat ID, owner name or Project. Filter by date range, document count or credit consumption. Sort by any column to prioritise review.

Exporting Data

To export Assistant analytics to Excel:

1. Apply desired filters or search criteria.
2. Click the **Export** button.

The exported file includes all metrics with detailed breakdowns.

Playbooks

The Playbooks analytics view provides comprehensive data on Playbook usage, deployment patterns and access control across your organisation.

Columns Displayed

- **Name:** Playbook identifier.
- **Owner:** User who created the Playbook.
- **Date Added:** When the Playbook was created.
- **Flows:** Number of times the Playbook has been deployed in Flows.
- **Prompts:** Total number of prompts configured in the Playbook.
- **Credits:** Total credits consumed by all Flows using this Playbook.
- **Builders:** Users with permission to edit the Playbook (clickable names shown in blue).
- **Consumers:** Users with permission to use the Playbook (clickable names shown in blue).
- **Organisation Wide:** Whether the Playbook is available to all users (Yes/No).
- **Status:** Current Playbook status.

Searching and Filtering

Search by Playbook name, owner or builder/consumer names. Filter by usage frequency, date range, credits consumed or organisation-wide status. Sort by any column to prioritise analysis.

Exporting Data

To export Playbook analytics to Excel:

1. Apply any desired filters.
2. Click the **Export** button.

The exported file includes all prompt-level data and usage statistics.

API Management

Create and manage API credentials for external system integration. The API applications table shows:

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

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 a new Client Secret.
- **Edit** (pencil icon): Modify application settings.
- **Delete** (trash icon): Remove application.

Use pagination to navigate multiple pages.

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: Application Name and Description

Provide:

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

Click **Next** to proceed.

Step 2: Admin Selection

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 and click **Next** to continue.

Step 3: Permissions

Select the specific API permissions required for your integration using checkboxes.

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.

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 the Projects the API application should have access to. Use the search field to find specific Projects. Click **Next** to continue.

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

A list of all available Playbooks appears with checkboxes. Select the Playbooks the API application should have access to. Use the search field to find specific Playbooks. Click **Finish** to complete the application creation.

After completing all required steps, the API application is created with a unique Client ID, a Client Secret for authentication and the permissions, Projects and Playbooks configured during creation.

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.

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.

Developer

The Developer section provides access to external API documentation and integration resources for technical teams implementing system integrations.

Clicking **Developer** in the Admin navigation opens the Jylo Developer Portal in a new browser window. The portal contains:

- **Authentication:** OAuth 2.0 client credentials grant implementation guides.
- **Rate Limiting:** API request limits and optimisation strategies.
- **API Reference:** Complete endpoint documentation covering Projects, Playbooks, Notifications and Settings.
- **Interactive Testing:** Built-in tools for testing API endpoints with live responses.
- **Configuration Guides:** Documentation for Models, Rates and other platform settings.

The Developer portal is designed for technical integration teams, system administrators and software engineers building custom applications via the API. API credentials must be created through the API Management section before accessing the portal.

Glossary

Term	Definition
Admin	Users with elevated permissions who can configure organisation-wide settings and manage users.
Assembly	Output template system for generating formatted reports from Flow results (Flow Assembly, Document Assembly).
Assistant	The AI chat interface within Jylo, used for conversation and content analysis. Formerly 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.
Context Window	The amount of text an AI model can process in a single interaction.
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 in Flows.
Files	Uploaded content for analysis. Formerly called Documents in Jylo 1.0.
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 the # symbol, allowing references to outputs from prompts.
Layout Credits	Credits consumed by citation preparation (Document Intelligence), enabling paragraph-level Evidence highlighting.
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.
Model	AI language model that powers analysis, with various options available for different tasks.
Outputs Folder	A folder in the Files section of a Project where background-generated export files are automatically saved.
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.
Playbook Metadata	Custom metadata fields configured by administrators to categorise Playbooks by attributes such as department or industry.
Project	Container for related work, providing organisation and access control for teams.
Project Metadata	Structured information fields about Projects and clients, configured by administrators.
Prompt	Foundation component of an analysis workflow that extracts specific information from documents.
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.
Tenant	A Jylo organisational instance, operating securely on Microsoft Azure.
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.