Jylo

Creating and Managing Projects

A guide for Jylo users

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Version 2.0

Introduction

Projects are the primary workspace in Jylo where teams upload documents, run AI analyses and manage workflows. Every piece of content and analysis exists within a Project, ensuring all related work is consolidated in a single, secure location.

This guide covers Project creation, team management, metadata configuration and ongoing Project administration.

Understanding Project Centricity

All content and analysis in Jylo exists within a **Project**. This project-centric approach ensures that documents, analyses, discussions and outputs are consolidated within a single workspace. The benefits include:

- **Complete Context:** Team members can see all relevant files and analyses in one place.
- **Controlled Access:** Only authorised users can view Project contents.
- **Simplified Organisation:** Permissions are managed at Project level rather than across multiple folders.
- **Audit Trail:** All activities and associated AI costs are tracked through the Overview page.

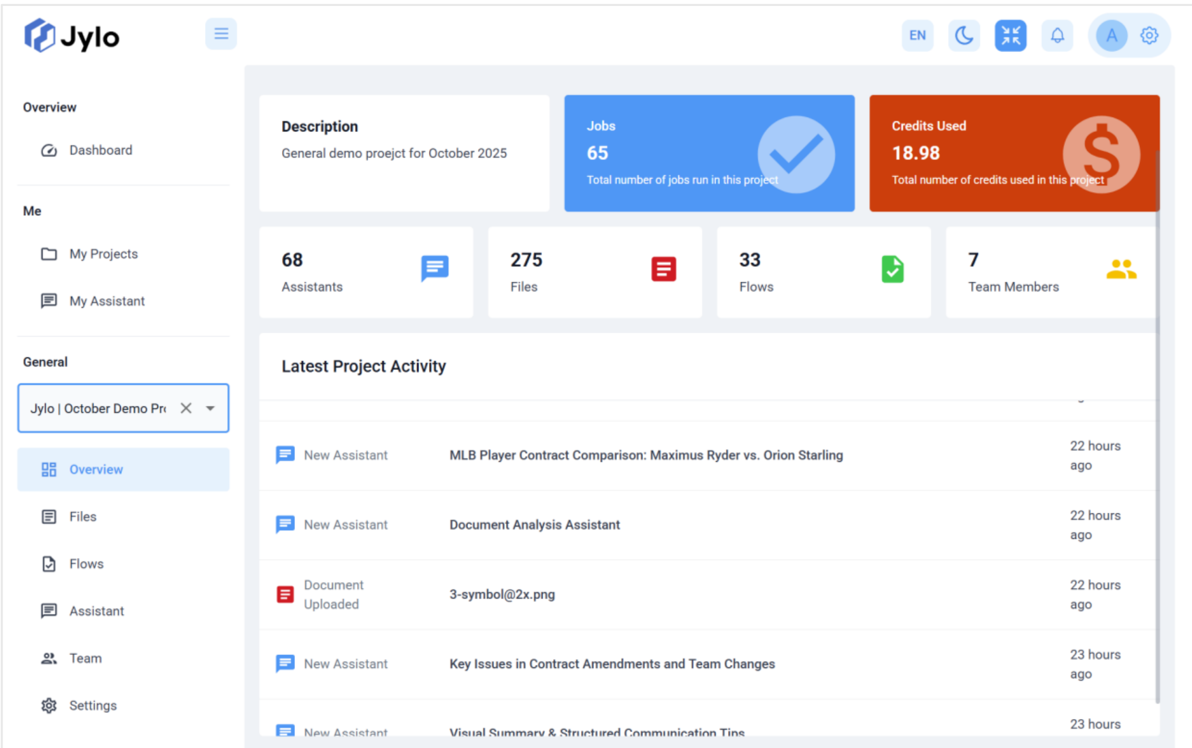

Figure 1. The Project Overview page displaying recent activity and metrics.

Creating a New Project

Any user can create a Project for a specific matter, client or initiative. Team members can be added at the discretion of the Project creator.

Step 1: Enter Project Details

1. Navigate to **My Projects** in the sidebar.
2. Click the blue **Plus** button in the top-right corner of the My Projects page.
3. Enter a **Project Name** (e.g. "Acme Corp – Q4 Contract Review").
4. Provide a **Project Description** explaining the scope and objectives.
5. Click **Next**.

> **Tip**
> Use clear, descriptive Project names that reflect the purpose of the work. Including client names and timeframes makes Projects easier to locate.

Step 2: Configure Metadata

Metadata fields are optionally configured by your organisation's administrator. All configured fields can be completed during this step.

- **Required Metadata Settings:** Must be completed before the Project can be created (e.g. client name, matter type, practice area).
- **Available Metadata Settings:** Optional fields providing additional context.

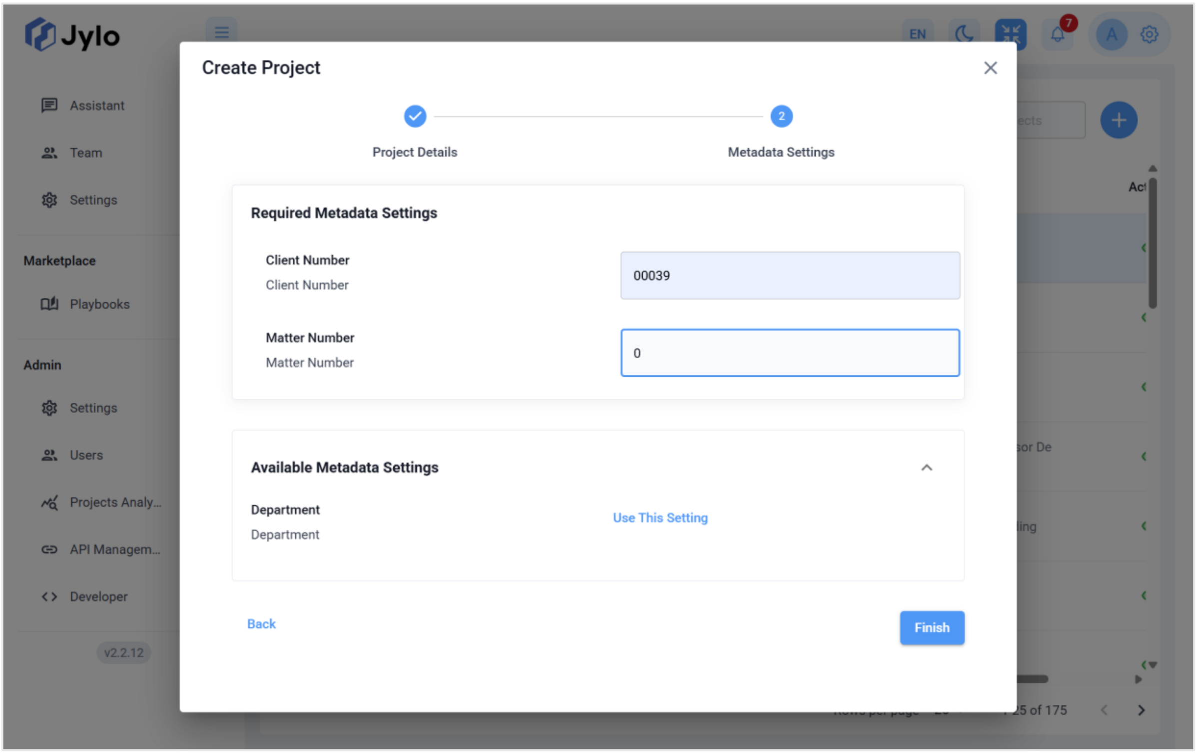

Figure 2. The Metadata Settings step in the Create Project dialogue.

Click **Finish** to create the Project. You will be redirected to the Project Overview page.

Building Your Project Team

Jylo provides two levels of Project permission:

Role	Description
User	Full access to Project content and features including documents, Flows, Assistant and verification.
Admin	All User permissions plus the ability to manage team membership and Project configuration.

Adding Team Members

1. Navigate to the **Team** section.
2. Click the blue **Plus** button.
3. Search for users in the “Available users” column.
4. Select users and click the right arrow to add them.
5. Click **Save**.

New members receive the User role by default and gain immediate access to the Project.

Managing Roles

1. Locate the user in the **Team** section.
2. Click the pencil icon next to their name.
3. Select the appropriate role (**Admin** or **User**).

> **Best Practice**
> Grant the Admin role only to users who need to manage Project settings or team membership.

Removing Team Members

1. Navigate to the **Team** section.
2. Click the trash icon next to the user.
3. Confirm the removal.

Removed users immediately lose access to the Project. Their previous contributions remain in the audit trail.

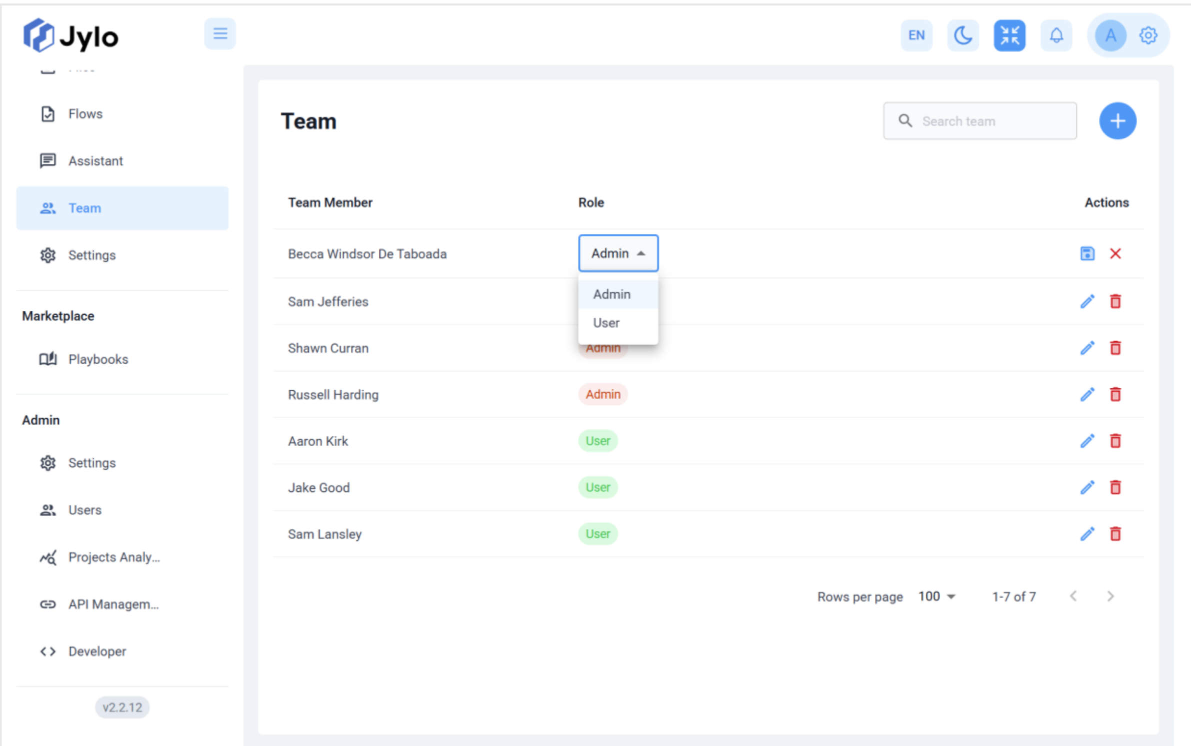

Figure 3. The Team management interface showing roles and actions.

Project Settings and Ongoing Management

Project Admins can reconfigure Project details at any time via the **Settings** page.

Modifying Project Information

1. Navigate to **Settings > General**.
2. Modify the Project name or description as required.
3. Click **Save Changes**.

Updating Metadata

1. Navigate to **Settings > Metadata**.
2. Modify the metadata fields.
3. Changes save automatically.

Deleting a Project

1. Navigate to **Settings > General**.
2. Click **Delete Project**.
3. Enter the Project name to confirm.
4. Select "I Understand, Delete This Resource".

> **Warning**
> Deleted Projects enter a retention period set by your organisation's administrator before permanent deletion. Administrators can recover Projects during this period.

Notifications and Collaboration

Jylo generates notifications to keep your team informed of Project activity. Notifications are triggered by:

- Task assignments in Flows
- Team membership changes
- Document uploads
- Playbook usage

Access notifications by clicking the bell icon in the top-right corner. A red badge indicates the number of unread notifications.

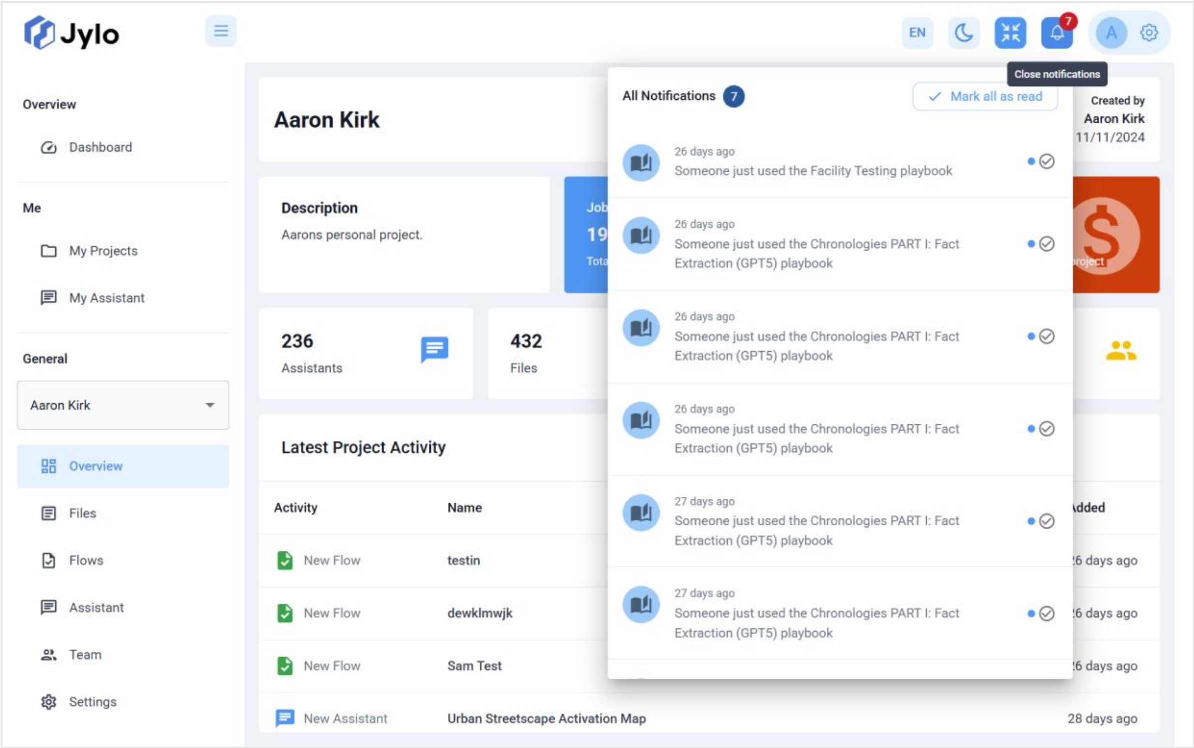

Figure 4. The notifications panel displaying recent Project activity.

Next Steps

Now that your Project is set up, you can begin uploading documents, launching Flows and using the Assistant. For further guidance on specific features, refer to the following resources:

- **Jylo User Guide:** Comprehensive reference covering the full platform.
- **Jylo Quick Start Guide:** A concise onboarding guide to get you productive quickly.
- **Playbook Prompting Guide:** Detailed instructions for building and configuring Playbooks.

For additional support, contact us at support@jylo.ai