



# Getting Started with Playbooks

*A Guide for Jylo Users*

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## What Are Playbooks?

Playbooks are reusable workflow templates that define how AI analysis is applied to your documents within Jylo. Each Playbook contains specific prompts and logic that determine what information to extract, how to process it and how to present the results.

## Benefits of Using Playbooks

- **Consistency:** Apply the same analytical approach across all documents.
- **Efficiency:** Save time by reusing established analysis workflows.
- **Customisation:** Configure complex analyses with conditional logic and multiple prompt types.
- **Quality Control:** Build verification directly into the workflow.
- **Collaboration:** Share expertise through standardised processes.

## Working with Playbooks

### Playbooks, Flows and Assemblies

Understanding how Playbooks fit into the Jylo workflow is essential:

- **Playbooks** define the analysis pattern—what questions to ask and what logic to apply.
- **Flows** are where you apply a Playbook to documents and carry out your human review of the AI output.
- **Assemblies** are how you bring together the AI output into formatted reports for use outside of Jylo.

You select which Playbook to use when you create a new Flow within a Project. This is where you decide which analytical approach is right for your specific documents.

## The Playbook Marketplace

The Marketplace serves as a central repository where you can browse, access and manage Playbooks.

To access the Marketplace:

1. Navigate to **Marketplace** in the left sidebar.
2. Select **Playbooks** from the submenu.

Each Playbook appears as a card displaying basic information. Click on a card to view the overview with prompt labels and descriptions.

## 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.

**Note**

The Marketplace is particularly useful for users with Builder access who create and manage Playbooks. All users are encouraged to browse the Marketplace to explore available Playbooks.

## Playbook Access Control

Playbooks have specific access controls that determine who can use and modify them:

- **Builder permission:** Enables a user to clone, edit and modify the Playbook after publication.
- **Consumer permission:** Makes the Playbook visible to users who can deploy it in Flows.
- **Organisation-wide access:** Users can preview and use the Playbook but cannot view or edit internal information such as headers and prompts.

Your access to specific Playbooks depends on the permissions assigned to you by the Playbook creator or your organisation's administrator.

## Creating a Playbook

You can create custom Playbooks from the Marketplace. Creating a Playbook follows six steps:

Step	Description
1. Metadata	Define the Playbook name, description and organisation metadata.
2. Prompts	Create prompts with labels, questions, answer types and model selection.
3. Outputs	Configure output templates using Outputs (Basic) or Outputs (Advanced) for Flow and Document Assemblies.
4. Testing	Validate the Playbook by creating test Flows with sample documents.
5. Access Control	Assign Builder or Consumer permissions to specific users.
6. Summary	Review the Playbook overview, upload an icon and publish to the Marketplace.

## Step-by-Step Walkthrough

### 1. Metadata

1. Navigate to **Marketplace > Playbooks** and click the blue **Plus** button in the top-right corner.
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**.

**Tip**

Use clear, descriptive names that reflect the Playbook's purpose and include version numbers for easy identification and tracking.

## 2. Prompts

The Prompts step is where you create the foundation of your analysis workflow. The screen is divided into three panels: the left panel lists all created prompts, the middle panel contains the prompt configuration form and the right panel provides document upload for test and source documents.

1. Click **Add Prompt** in the left panel.
2. Complete the prompt configuration form with the **Heading, Description, Question, Answer Type** and **Model**.
3. Upload test and source documents using the right panel.

## 3. Outputs

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

- **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** (one consolidated report combining data from all documents) and **Document Assembly** (individual reports for each document).

**Note**

Outputs (Advanced) requires the Jylo Word Add-In to be deployed by your Microsoft 365 administrator. Contact [support@jylo.ai](mailto:support@jylo.ai) for deployment guidance.

## 4. Testing

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

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.

## 5. Access Control

Configure who can use and modify your Playbook by assigning permissions to specific users:

- **Builder:** Allows a user to edit, modify and manage the Playbook after publication.
- **Consumer:** Allows a user to view and deploy the Playbook in Flows.

You can also toggle organisation-wide availability to make the Playbook accessible to all users without individual permission assignment.

## 6. Summary

1. Review the Playbook name and description.
2. Upload a Playbook icon.
3. Review the list of all prompts and their descriptions.
4. Click **Save And Exit** to publish your Playbook to the Marketplace.

## Next Steps

Now that you understand the fundamentals, you may wish to build your own Playbook. For comprehensive guides on Playbook building, visit our *Playbook Prompting* and *Assembly Building* guides. If you have any questions, contact us at [support@jylo.ai](mailto:support@jylo.ai).