

d.velop

d.velop pilot: Administration

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1. d.velop pilot: Administration

1.1. Basic information about using the application

In this chapter you will find instructions relating to the product and general information.

1.1.1. About d.velop pilot

Smart DMS based on the latest AI technology

d.velop pilot enhances your existing d.velop documents system by giving you the ability to interact with your documents in an intelligent manner. The app uses cutting-edge artificial intelligence technologies. Natural language inputs are interpreted using large language models (LLM for short) and translated into actions. In the future, this will enable you to work more easily and effectively with your documents, while also saving you time.

Easily answer complex questions

You can use the chat function to formulate specific questions about the document – in completely natural language. For example, you can get a summary of a document or information about the term of a contract within seconds. And all without a time-consuming search – conveniently provided to you in your chat widget.

1.2. Installation and uninstallation

In this chapter you will find information about installing the application.

1.2.1. System requirements

Browsers

- Mozilla Firefox
- Google Chrome
- Microsoft Edge

Required applications in a hybrid scenario

- d.velop documents, Annual 2023 version (on-premises)
- d.velop process studio, Current 2024.Q4 version (on-premises)

1.2.2. Installing d.velop pilot

You want to install d.velop pilot in your d.velop cloud tenant.

This is how it works

1. Click **Subscribe App** on the start page of your d.velop cloud instance.
2. Select the **d.velop pilot** app from the list.
3. Click **Subscribe now**.
4. Follow the setup wizard.
5. Confirm the deployment with **Subscribe for a fee**.

1.2.3. Uninstalling d.velop pilot

You want to remove d.velop pilot from your d.velop cloud tenant.

This is how it works

1. Click **d.velop cloud management** on the start page of your d.velop cloud instance.
2. Select the organization with the tenant from which you want to remove the app.
3. Select the correct tenant and click on **Edit tenant**.
4. Find d.velop pilot in the list and click **Cancel app**.
5. Confirm to unsubscribe.

1.3. Configuring d.velop pilot

In this chapter you will find information about configuring d.velop pilot.

1.3.1. Setting up user roles

Under **Permissions** in the **Configuration** feature, you can assign the user role **d.velop pilot user** to various groups. After setting up d.velop pilot, each authenticated user automatically has the role **d.velop pilot user**.

Users or groups with the role **d.velop pilot user** automatically have access to all functions of d.velop pilot.

Adjusting permissions

You want to adjust which groups have access to the d.velop pilot functions.

This is how it works

1. Navigate to the d.velop pilot settings.
2. Go to the **Permissions** area.
3. Click **Select** next to the user role **d.velop pilot user**.
4. Select the groups that you want to have access to the d.velop pilot functions.
5. Click **Apply** to save the configuration.

Note

The permissions are stored in a cache in the various applications. There may therefore be a slight delay in applying the changes.

1.3.2. Selecting the LLM provider

Under **LLM provider selection** in the **Configuration** feature, you can select which LLM or LLM provider will be used to process the queries.

Changing the LLM provider

You want to change which LLM provider is used to process the queries.

This is how it works

1. Navigate to the d.velop pilot settings.
2. Go to the **LLM provider selection** area.
3. Select an LLM provider.
4. Save the configuration.

1.3.3. Configuring an assistant

Under **Assistants** in the **Configuration** feature, you can specify which documents will be available in an interactive chat.

Creating a new assistant

You want to provide documents for an interactive chat.

This is how it works

1. Navigate to the d.velop pilot settings.
2. Go to the **Assistants** area.
3. Click **Add**.
4. Complete all mandatory fields.
5. Save the configuration.

After you save the configuration for the first time, indexing begins. During indexing, the documents are prepared and analyzed for d.velop pilot so that d.velop pilot can access the documents quickly and efficiently to answer queries. This indexing can take several hours. Once indexing is complete, you will be notified by e-mail.

Description of settings

- **Assistant name:** If multiple assistants are configured, this description is displayed in the chat window. These names allow users to know which assistant they are currently interacting with. This field supports multiple languages. You can add additional languages using the translation icon .
- **Welcome message:** This message is displayed when a new chat window is opened. You can enter information about the documents contained in this assistant, for example. This field supports multiple languages. You can add additional languages using the translation icon .
- **Automatic update:** Specify how often you want the assistant to update. If you select **Never**, the assistant is created once and any documents added to the data source after creation will not be available in the assistant.
- **Data source:** An assistant always requires a data source. The data source indicates which documents are available in the chat.
- **Repository:** Select which repository will be used as the data source for the assistant.
- **Category:** The category of documents that will be processed.
- **Metadata:** Select the metadata to be included in the index. The selected properties will be available as filters in the chat after successful indexing. You can select a maximum of ten properties.

Filter options

- **Creation date (start):** Limit the document selection by considering only those documents created on or after this date.
- **Creation date (end):** Limit the document selection by considering only those documents created on or before this date.

API key: Enter an API key. This API key is used by d.velop pilot to process the documents. The API key must have read permissions for the documents of the selected category.

Note

Only the latest 5,000 documents are processed. If the total number of 5,000 documents is exceeded, an automatic update function removes older documents from the assistant's database.

1.3.4. d.velop pilot action in d.velop process studio

The new d.velop pilot action allows you to send queries to d.velop pilot's large language model (LLM) within a process.

Adding an action

You want to use the action in a process.

This is how it works

1. Add a new step in d.velop process studio.
2. Choose **Action** as the type.
3. Select **d.velop pilot** from the drop-down menu.

Description of parameters:

- **Prompt:** Contains the query to the LLM. If you want to control the position of the context, you can use the placeholder **{context}** in the prompt. A prompt might then look like this: "This is an invoice: {context}. What is the invoice amount?"
- **Document:** You can use this parameter to provide context along with the prompt, on which the prompt will then be based. The document must be a base64 blob. By default, the context or document content is appended to the end of the prompt.
- **Mime type:** Specifies the mime type of the document. The supported mime types are: **application/pdf**, **image/jpeg**, **image/png**, **image/tiff** and **text/plain**.
- **Output:** The output of the action is an object (**action.output.result**) containing, among other things, the LLM's answer.

1.3.5. Checking data usage

Under **LLM provider selection** in the **Configuration** feature, you can see how many queries you placed to d.velop pilot this month.

1.4. Frequently asked questions

You can find answers to frequently asked questions in this section.

1.4.1. When do I need an assistant and when would it be better to work with the single document view?

Question: Is it a question/task relating to a single document (e.g. summarizing, extracting individual information)?

Answer: Use single document view. You can use this view as soon as d.velop pilot is purchased for a tenant without the need for any additional configuration.

[de]

Question: Is it a question where you're sure that the answer is somewhere in the documents, but you don't know exactly which document? Or is it a question where information from several documents could be relevant?

Answer: Use the assistant.

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Question: Does your question relate to a small number of specific documents?

Answer: Use the result list.

1.4.2. Why are the response times so long?

Large languages models (LLMs) are based on very complex calculations. Therefore, there may be long wait times for individual queries.

1.4.3. Is there a maximum document size?

To keep response times short, processing is currently limited to documents with a length of less than 20,000 tokens. Longer documents are immediately rejected by the software. A token can be a word, a subword (a subset of a word), or even a single character. On average, a token is two to four characters long.

1.4.4. Does d.velop guarantee the accuracy of the information generated?

No. Even though we always try to support the generated answers with document content, incorrect or incomplete statements may occur. This problem is called “hallucination” and is a fundamental limitation of current large language models (LLMs). Therefore, always check important information carefully.

1.4.5. Is my data used to train other AI models?

No. The security of your data is very important to us. This means we always treat your data as confidential. Using it to improve other AI models is not what we're about. We therefore only work with AI providers whose processing guidelines explicitly exclude the use of inputs for training purposes.

1.4.6. Is my data secure?

We secure your data according to the same high standards that we apply to our live systems. In particular, this means your data is only transmitted in encrypted form. Further information can be found in the data privacy agreement or in the data processing agreement.

1.5. Additional information sources and imprint

If you want to deepen your knowledge of d.velop software, visit the d.velop academy digital learning platform at <https://dvelopacademy.keelelearning.de/>.

Our E-learning modules let you develop a more in-depth knowledge and specialist expertise at your own speed. A huge number of E-learning modules are free for you to access without registering beforehand.

Visit our Knowledge Base on the d.velop service portal. In the Knowledge Base, you can find all our latest solutions, answers to frequently asked questions and how-to topics for specific tasks. You can find the Knowledge Base at the following address: <https://kb.d-velop.de/>

Find the central imprint at <https://www.d-velop.com/imprint>.