

d.velop

d.velop pilot: Using the application

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1. d.velop pilot: Using the application

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. Functions of d.velop pilot

Get to know the functions of d.velop pilot.

1.2.1. Integrating into the document view

In the document view, you can access the functions of d.velop pilot using the context action (balloon icon). The context action offers two functions: a summary and a chat.

Summary

The summary describes the most important information in the document in a few sentences.

You can use the copy icon to copy the summary directly to the clipboard. You can use the thumb icons to provide feedback on the quality of the summary. The feedback is used to improve the services provided.

Chat

In the chat you can ask questions about the document. The chat is available immediately when the context action is called, without the need for an additional click. The chat history is retained for 30 days. You can save the history to the document's notes. You can copy the content of individual answers from the assistant directly to the clipboard. You can use the thumb icons to provide feedback on the quality. The feedback is used to improve the services provided.

1.3. Integrating into the result list

You can use the result list to select up to ten documents for an interactive chat.

Creating an interactive chat

You want to create an interactive chat that covers multiple documents.

This is how it works (old process)

1. Run a search.
2. Click the **Assistant** context action (balloon icon).
3. Select up to ten documents in the result list.
4. Click **Assistant**.
5. Wait as the chat loads.
6. Ask questions about the selected documents.

This is how it works (new process)

1. Run a search.
2. Select up to ten documents in the result list.
3. Click the **Assistant** context action (balloon icon).
4. Wait as the chat loads.
5. Ask questions about the selected documents.

1.4. Chatting with an assistant

You can use an assistant to interact with a subset of your documents. Your administrators determine which documents are available to the assistant to answer your questions.

You can also further restrict the document selection using a filter, provided your administrators have enabled this function. This allows you to ask for more specific information.

When you ask the assistant questions, the assistant tries to answer your question using the documents from your system. When an answer is given, the assistant indicates which documents were used to answer the question or were used as context.

Interacting with an assistant

You can access the assistants from the start page (dashboard). To do this, click **Assistant**.

Functions

- In the assistant view you can switch between the different assistants, assuming your administrators have configured multiple assistants.
- You can use functions to filter documents, clear the current chat history and view context.
- For each message you can provide feedback on the quality of the answer using the thumb icons.
- You can use the copy icon to copy the answer directly to the clipboard.

1.5. Frequently asked questions

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

1.5.1. 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.

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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.

1.5.2. 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.

1.5.3. 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.

1.5.4. 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.

1.6. 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.keelearning.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>.