



AiX Getting Started

v2026.3

DDX Business Solutions Limited

Customer Reference

Table of Contents

1. Getting Started	3
1.1 Overview	3
1.2 Quick Start	6

1. Getting Started

1.1 Overview

■# Getting Started with AiX

Welcome to **AiX**, an enterprise AI and automation platform designed to make Artificial Intelligence practical and accessible for business users.

AiX brings AI models, organizational knowledge, reusable AI Assistants, workflow automation, and business processes together within a single platform.

This Getting Started guide introduces the main AiX capabilities and helps you understand where to begin.

What is AiX?

AiX enables organizations to use AI within their own business environment while maintaining control over their data, AI models, access, and business processes.

Rather than providing only a conversational AI interface, AiX allows AI to become part of everyday business activities.

With AiX, you can:

- Interact with AI models through **Chat**
- Ask questions using organizational information with **Knowledge Base**
- Use purpose-built AI experiences with **Assistants**
- Build and run automated business processes with **Smartflow**
- Automatically execute processes with **Scheduler**
- Work with documents, files, and enterprise information
- Incorporate human review and approval into AI-assisted processes

The capabilities available to you depend on your organization's AiX configuration and your access permissions.

AiX at a Glance

AiX provides several capabilities that work independently or together.

Chat

Chat is the simplest way to start using AiX.

Ask questions, generate content, analyze information, work with documents, and interact directly with the AI models available to you.

Start here if: you want to interact directly with AI.

Knowledge Base

Knowledge Base allows AI to work with organizational information.

AiX retrieves relevant information from approved documents and information sources and provides it to the AI model as context for answering your questions.

Start here if: you want answers based on your organization's information.

Assistants

Assistants provide reusable AI experiences designed for specific business purposes.

An Assistant can combine predefined instructions, an AI model, organizational knowledge, and other configured capabilities.

Start here if: you have a specific recurring task that benefits from a consistent AI experience.

Smartflow

Smartflow is AiX's no-code workflow and AI orchestration capability.

It allows AI, content, business rules, integrations, and human activities to be combined into repeatable business processes.

Start here if: you want to automate a multi-step business process.

Scheduler

Scheduler allows supported AiX processes to run automatically at defined times or intervals.

Start here if: you want an AiX process to execute automatically.

Understanding the AiX Approach

The AiX capabilities build on each other.

A simple way to think about them is:

Chat Ask AI.

↓

Knowledge Base Ask AI using organizational knowledge.

↓

Assistants Create a purpose-built AI experience.

↓

Smartflow Turn AI activities into a repeatable business process.

↓

Scheduler Run that process automatically.

You do not need to use every capability. Start with the feature that best matches what you want to accomplish.

A Simple Example

Consider a business process for reviewing incoming documents.

With **Chat**, you could upload a document and ask AI to summarize it.

With **Knowledge Base**, you could compare the document against your organization's policies or procedures.

With an **Assistant**, you could provide users with a predefined Document Review Assistant that follows consistent review instructions.

With **Smartflow**, you could create a process that automatically reads the document, extracts important information, performs an AI review, requests human review, and generates a standardized report.

With **Scheduler**, the process could be executed automatically at a defined time or interval where appropriate.

AiX allows organizations to start with simple AI interactions and progressively introduce structured automation as requirements develop.

Working with AI Models

AiX can support different AI models depending on your organization's environment and configuration.

The models available to you are managed by your organization.

As a user, you generally do not need to understand how an AI model is deployed. Simply select an available model where a choice is provided and use the model appropriate for your task.

For information about configuring and managing models, refer to **AI Model Management**.

Working with Enterprise Information

AiX can work with documents, files, and information made available by your organization.

Depending on your environment and permissions, this information may be used through Knowledge Bases, Assistants, Smartflows, or other AiX capabilities.

Access to information remains subject to the permissions and configuration established by your organization.

Human Oversight

AI can assist with analysis, content generation, information retrieval, and business process automation, but AI-generated results should be reviewed appropriately.

AiX supports human involvement within AI-assisted processes, including review and approval activities where required.

For important business activities, users should verify AI-generated information against authoritative sources and follow their organization's applicable policies and procedures.

Access and Permissions

What you see in AiX depends on your role and permissions.

Some users may primarily use existing Chats, Knowledge Bases, Assistants, and Smartflows.

Other users may have additional permissions to create, configure, publish, or manage these capabilities.

System administrators have additional responsibilities for platform configuration, users, access, integrations, and other administrative functions.

Refer to the **Administration** documentation for administrative activities.

Where to Go Next

If you are using AiX for the first time, continue with the remaining **Getting Started** topics to learn how to access and navigate the platform.

When you are ready to begin using individual AiX capabilities, continue to the **User Guide**.

The User Guide provides detailed instructions for:

- Chat
- Knowledge Base
- Assistants
- Smartflow
- Scheduler

For technical and operational topics, refer to the appropriate **Administration**, **AI Model Management**, **Operations & Maintenance**, **Architecture**, **Deployment**, **Integration**, or **Security** sections of the documentation.

Download Documentation

Prefer an offline or printable copy of this section?

Download Getting Started (PDF)

The PDF contains the complete Getting Started documentation for this release and is generated from the same documentation source as this website.

1.2 Quick Start

This Quick Start introduces the main AiX capabilities through a few simple activities.

You do not need to complete every activity. The features available to you depend on your organization's configuration and your access permissions.

1. Start a Chat

The quickest way to begin using AiX is with **Chat**.

1. Open **Chat** from the AiX navigation menu.
2. Select an available AI model if required.
3. Enter a question or instruction.
4. Select **Send** or press **Enter**.

For example:

> Summarize the key considerations when introducing AI into a business process.

You can continue the conversation with a follow-up question:

> Present this as five recommendations for management.

AiX uses the previous conversation as context when responding to follow-up questions.

For more information, see **User Guide** → **Chat**.

2. Work with a Document

Where file upload is available, you can provide a document as part of your conversation.

1. Start or open a Chat.
2. Add a supported document.
3. Enter an instruction describing what you want AiX to do.
4. Submit your request.
5. Review the response.

For example:

> Summarize this document and identify the key actions, dates, and decisions.

You can then continue with questions about the document:

> Which actions require management attention?

Always review important information against the original document before using AI-generated results for business decisions.

3. Ask a Knowledge Base

Use **Knowledge Base** when you want answers based on information provided by your organization.

1. Open **Knowledge Base**.

2. Select a Knowledge Base available to you.
3. Enter your question.
4. Submit the question.
5. Review the response and available source references.

For example:

> What is the approval process described in our procurement policy?

AiX searches for relevant information within the selected Knowledge Base and provides that information to the AI model as context.

Where references are available, review the original source when the information is important.

For more information, see **User Guide** → **Knowledge Base**.

4. Use an Assistant

Assistants provide AI experiences configured for a particular task or business purpose.

1. Open **Assistants**.
2. Select an Assistant available to you.
3. Enter your question or provide the requested information.
4. Submit your request.
5. Review the response.

Unlike general Chat, an Assistant already contains instructions that guide how the AI should perform its task.

For example, a Document Review Assistant might already know how your organization expects documents to be reviewed and how the results should be presented.

For more information, see **User Guide** → **Assistants**.

5. Run a Smartflow

Smartflow allows you to execute a predefined business process.

1. Open **Smartflow**.
2. Select a Smartflow available to you.
3. Review its description and required inputs.
4. Provide the requested information or files.
5. Select **Run**.
6. Monitor the execution.
7. Review the generated results.

A Smartflow may perform several activities automatically.

For example:

Document → **Read Content** → **AI Analysis** → **Human Review** → **Generate Report**

Some Smartflows may pause and wait for a user to review information or perform an action before continuing.

For more information, see **User Guide** → **Smartflow**.

6. Review Your Results

Whether you are using Chat, Knowledge Base, Assistants, or Smartflow, remember that AI-generated information should be reviewed appropriately.

For important business information:

- Verify facts against authoritative sources.
- Review important names, dates, figures, and calculations.
- Check source references where available.
- Confirm that the result addresses your intended task.
- Apply human review or approval where required.

AI should assist your business process rather than replace appropriate business judgement and controls.

Choosing the Right AiX Capability

If you are unsure where to start, use this simple guide:

I want to... Use ----- ----- Ask AI a general question Chat
Analyze or summarize a document Chat Ask questions using organizational information Knowledge Base
Perform a predefined conversational AI task Assistant Execute a repeatable multi-step process Smartflow
Run a process automatically at a defined time Scheduler

What's Next?

You have now seen the main ways of working with AiX.

Continue to the **User Guide** for detailed instructions on each capability.

If you create or manage AiX capabilities, the User Guide also explains how to work with Knowledge Bases, Assistants, Smartflows, and Schedules according to your permissions.

Platform administrators and technical teams should refer to the **Administration**, **AI Model Management**, **Operations & Maintenance**, **Architecture**, **Deployment**, **Integration**, and **Security** sections.