



AiX User Guide

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DDX Business Solutions Limited

Customer Reference

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1. User Guide

1.1 Overview

■# User Guide Overview

AiX is an enterprise AI and automation platform designed to help business users apply Artificial Intelligence to everyday business activities, documents, information, and processes.

AiX brings AI, enterprise knowledge, workflow automation, and business applications together within a single platform. Depending on the features enabled by your organization, you can use AiX to interact with AI models, work with organizational knowledge, automate business processes, and execute reusable AI-powered tasks.

What You Can Do with AiX

AiX provides several capabilities that can be used independently or combined to support business processes.

Chat

Use **Chat** to interact directly with available AI models.

You can ask questions, analyze information, generate or refine content, and work with documents made available during the conversation.

The AI models available to you are determined by your organization's AiX configuration.

Knowledge Base

A **Knowledge Base** allows you to ask questions using information provided by your organization.

Knowledge Bases can contain documents and other approved information sources. AiX retrieves relevant information from these sources and provides it to the AI model as context when answering your questions.

Where available, references to the source information can be included with the response to help you review and verify the answer.

Assistants

Assistants provide predefined AI experiences for particular tasks or business purposes.

An Assistant can combine instructions, AI models, Knowledge Bases, and other configured capabilities so that users can perform a task without repeatedly defining the same prompts or settings.

Smartflow

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

Smartflows allow business processes to be represented as a sequence of connected steps. A Smartflow can combine AI processing with documents, data, business rules, integrations, and human review.

Depending on your permissions, you may be able to run existing Smartflows or create and modify your own.

Scheduler

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

For example, a Smartflow may be scheduled to process information every morning, generate a regular report, or perform another recurring business activity.

Working with AiX

A typical AiX activity may involve several capabilities working together.

For example, you might use a Knowledge Base to provide trusted organizational information, an AI model to analyze that information, and a Smartflow to automate the overall process.

AiX can also support human review and approval steps where business processes require additional oversight.

This allows AI to become part of a controlled business process rather than operating as a standalone tool.

Your Access

The features, AI models, Knowledge Bases, Assistants, Smartflows, and information available to you depend on the access permissions configured by your organization.

Some users may primarily use existing AI applications and workflows, while other users may have permission to create, configure, or manage them.

Administrative and platform configuration activities are covered separately in the **Administration** section of the AiX documentation.

Getting Started

If you are new to AiX, a good starting point is to become familiar with **Chat**, followed by **Knowledge Base**, **Assistants**, and **Smartflow**.

The following sections of this User Guide explain how to use each capability and provide examples of common tasks.

Download Documentation

Prefer an offline or printable copy of this section?

Download User Guide (PDF)

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

1.2 Chat

Chat provides a conversational interface for interacting with AI models available within AiX.

You can use Chat to ask questions, analyze information, create and refine content, summarize documents, explore ideas, and perform other AI-assisted tasks using natural language.

The AI models available in Chat are determined by your organization's AiX configuration.

Starting a Chat

To start a new conversation:

1. Open **Chat** from the AiX navigation menu.
2. Select an available **AI Model**.
3. Enter your question or instruction in the message box.
4. Select **Send** or press **Enter** to submit your message.

AiX sends your request to the selected AI model and displays the response within the conversation.

You can continue asking questions within the same conversation. Previous messages provide conversational context that can help the AI understand follow-up questions.

Selecting an AI Model

Depending on your organization's configuration, more than one AI model may be available.

Different models may be suitable for different types of tasks, such as:

- General questions and content generation
- Reasoning and analysis
- Document understanding
- Coding and technical tasks
- Multilingual content

Select the model appropriate for your task before submitting your message.

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

Asking Questions

You can communicate with AiX using normal language.

For better results, provide clear instructions and include relevant context about what you want the AI to do.

For example:

> Summarize the key points from this document for a management audience.

Or:

> Review this text and identify the main risks, assumptions, and recommended actions.

You can also continue the conversation with follow-up instructions such as:

- > Make the summary shorter.
- > Explain the second point in more detail.
- > Present the findings as a table.

Working with Files

Where enabled, you can provide files or documents as part of your conversation.

AiX can use the content of supported files together with your instructions to perform tasks such as:

- Summarizing a document
- Extracting important information
- Comparing documents
- Identifying key topics
- Answering questions about document content
- Creating or transforming content

The supported file types and maximum file sizes may depend on your organization's AiX configuration.

Conversation Context

Messages within the same Chat conversation provide context for subsequent messages.

For example, after asking AiX to summarize a document, you can continue with:

- > What are the three most important findings?

AiX can use the preceding conversation when responding to the follow-up question.

For a different task or topic, consider starting a **New Chat** to avoid unrelated conversation context affecting the response.

Reviewing AI Responses

AI-generated responses should be reviewed before they are used for important business decisions or activities.

AI models can occasionally produce incomplete, inaccurate, or unexpected information.

When working with important business information, consider:

- Checking important facts against the original source
- Reviewing calculations and numerical information
- Verifying names, dates, and references
- Confirming that the response addresses your intended question

- Applying appropriate human review before using generated content

Chat and Enterprise Knowledge

Standard Chat interacts with the selected AI model using the information provided within the conversation.

When you need AI responses based on approved organizational documents or information, use an appropriate **Knowledge Base** or **Assistant** where available.

Knowledge Bases allow AiX to retrieve relevant organizational information and provide it to the AI model as additional context.

Chat History

AiX may retain your Chat conversations according to your organization's configuration and policies.

Previous conversations can be reopened where Chat history is available.

For a new or unrelated activity, start a new conversation rather than continuing an existing conversation.

Good Prompting Practices

You do not need to learn a special command language to use AiX. However, clear instructions generally produce better results.

A useful prompt usually explains:

Task — What you want AiX to do.

Context — Relevant background information.

Requirements — Any specific rules or constraints.

Output — How you want the result presented.

For example:

> Review the attached project update and prepare a management summary. Highlight the current status, major risks, outstanding decisions, and next actions. Keep the summary under 500 words and use headings for each section.

Next Steps

After becoming familiar with Chat, you may want to explore:

- **Knowledge Base** — Ask questions using organizational knowledge and documents.
- **Assistants** — Use predefined AI capabilities designed for particular tasks.
- **Smartflow** — Run or create AI-powered business workflows.

These capabilities extend Chat by combining AI with organizational information, reusable instructions, automation, and business processes.

1.3 Knowledge Base

Knowledge Base allows AiX to use your organization's documents and information when answering questions.

Instead of relying only on the general knowledge of an AI model, AiX can search the selected Knowledge Base for information relevant to your question and provide that information to the AI model as additional context.

This helps users work with organizational policies, procedures, manuals, reports, reference materials, and other business information through a conversational interface.

What is a Knowledge Base?

A Knowledge Base is a collection of information that AiX can search and use when responding to questions.

For example, an organization might create Knowledge Bases for:

- Human Resources policies
- Standard Operating Procedures (SOPs)
- Product documentation
- Customer service procedures
- Technical manuals
- Legal and compliance information
- Project documentation
- Internal policies and guidelines

Knowledge Bases can be created for a particular team, department, subject, or business purpose.

The Knowledge Bases available to you depend on your organization's configuration and your access permissions.

Using a Knowledge Base

To ask questions using a Knowledge Base:

1. Open **Knowledge Base** from the AiX navigation menu.
2. Select the Knowledge Base you want to use.
3. Enter your question.
4. Select **Send** or press **Enter**.
5. Review the response and any available source references.

AiX searches the selected Knowledge Base for information relevant to your question and uses the retrieved information as context for the AI model.

You can continue asking follow-up questions within the same conversation.

Asking Effective Questions

You can ask questions using normal language.

For example:

- > What is the company's annual leave policy?
- > What is the procedure for handling a customer complaint?
- > Summarize the approval requirements described in the procurement policy.
- > What documents are required before this process can be approved?
- > Compare the requirements described in these procedures.

Specific questions generally help AiX identify the most relevant information.

If the initial response does not contain the information you need, you can refine your question or provide additional context.

For example:

- > Only consider the requirements for permanent employees.

Or:

- > Focus on the approval process described in the Finance Policy.

How Knowledge Base Answers Questions

When you submit a question, AiX identifies information within the Knowledge Base that may be relevant to your request.

The relevant information is then provided to the selected AI model as context for generating the response.

In simplified terms:

Your Question → Search Knowledge Base → Retrieve Relevant Information → AI Model → Response

This approach is commonly known as **Retrieval-Augmented Generation (RAG)**.

It allows the AI model to work with organizational information without requiring that information to be used to train the AI model.

Source References

Where available, AiX can provide references to the information used when generating a response.

References may identify information such as the source document, page, section, or other available source details.

Use these references to review the original information and verify important answers.

For business-critical activities, the original source document should remain the authoritative source.

Working with Multiple Documents

A Knowledge Base may contain many documents covering the same or related subjects.

When you ask a question, AiX searches across the available information to identify relevant content.

This allows you to ask questions that may require information from multiple documents.

For example:

> Summarize the approval requirements across these procedures.

Or:

> Are there any differences between the requirements described in the HR Policy and Employee Handbook?

The quality of the response depends on the information available within the Knowledge Base and the relevance of the information retrieved.

Creating a Knowledge Base

Depending on your permissions, you may be able to create and manage Knowledge Bases.

When creating a Knowledge Base, provide a clear name and description so that users understand its intended purpose.

For example:

Name: HR Policies

Description: Company policies and procedures relating to employees, leave, benefits, expenses, and workplace practices.

A clearly defined Knowledge Base makes it easier for users to select the appropriate source of information for their questions.

Adding Content

Depending on your organization's configuration, content can be added or made available to a Knowledge Base from supported information sources.

These may include documents and enterprise content locations configured for AiX.

When adding content, consider whether the information is:

- Relevant to the purpose of the Knowledge Base
- Current and authoritative

- Appropriate for the intended users
- Free from unnecessary duplicate or outdated versions
- Organized clearly enough for users to identify the original source

Maintaining good source information improves the usefulness of the Knowledge Base.

Updating Knowledge

Organizational information changes over time.

Policies may be revised, procedures may be replaced, and new documents may become authoritative.

Knowledge Base owners should periodically review the information available within their Knowledge Bases and ensure that outdated or superseded information is handled appropriately.

This helps reduce the possibility of users receiving answers based on information that is no longer current.

Access and Permissions

Access to Knowledge Bases is controlled by your organization's AiX configuration.

Depending on your permissions, you may be able to:

- Use a Knowledge Base
- Create a Knowledge Base
- Add or manage content
- Share a Knowledge Base with other users or teams
- Modify Knowledge Base settings

Users should only have access to Knowledge Bases and source information that they are authorized to use.

Knowledge Base and Chat

Chat provides a general-purpose conversation with an AI model using the information supplied within the conversation.

Knowledge Base adds organizational information that AiX can search and provide to the AI model when answering your question.

For example:

Chat

> Explain what an employee leave policy normally contains.

The AI model can provide a general answer based on its available knowledge.

Knowledge Base

> According

1.4 Assistants

Assistants provide reusable AI experiences designed for specific tasks, business functions, or areas of expertise.

An Assistant combines predefined instructions with an AI model and, where configured, organizational knowledge and other AiX capabilities. This allows users to perform common tasks consistently without having to recreate detailed prompts each time.

Examples of Assistants may include:

- HR Policy Assistant
- Customer Service Assistant
- Legal Document Assistant
- Sales Assistant
- Technical Support Assistant
- Internal Knowledge Assistant

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

Using an Assistant

To use an Assistant:

1. Open **Assistants** from the AiX navigation menu.
2. Select an Assistant available to you.
3. Enter your question or instruction.
4. Select **Send** or press **Enter** to submit your message.
5. Review the response and continue the conversation as required.

The Assistant automatically applies its configured instructions and other settings when processing your request.

You do not need to enter these instructions each time you use the Assistant.

Assistants and Chat

Chat provides a general-purpose interface for interacting directly with an available AI model.

An **Assistant** provides a more structured experience for a particular purpose.

For example, when using Chat you might need to provide detailed instructions explaining how a document should be reviewed.

An Assistant designed for document review can already contain those instructions, allowing you to simply provide the document and ask the Assistant to perform the review.

This makes Assistants useful for tasks that are performed repeatedly or where users should follow a consistent approach.

Assistant Instructions

Each Assistant can contain predefined instructions that guide how the AI should perform its task.

Instructions may define:

- The Assistant's purpose
- How information should be analyzed
- Business rules or guidelines to follow
- The expected tone or style
- Required response structure
- Restrictions or boundaries
- How results should be presented

These instructions are automatically applied when you interact with the Assistant.

Using Knowledge with an Assistant

An Assistant can be connected to one or more **Knowledge Bases** where configured.

This allows the Assistant to use approved organizational information when responding to questions.

For example, an HR Assistant could use an organization's HR policies and procedures to help answer employee questions.

When organizational knowledge is used, AiX retrieves relevant information and provides it to the AI model as additional context.

Where available, source references may also be provided so that users can review the information used to generate the response.

Working with Files

Where enabled, you can provide files to an Assistant as part of your request.

For example, you might provide a document and ask an Assistant to:

- Summarize the document
- Review its contents
- Extract specific information
- Identify issues or risks
- Compare information
- Prepare a structured response

The way files are processed depends on the purpose and configuration of the Assistant.

Conversation Context

An Assistant can maintain conversational context within the current conversation.

This allows you to ask follow-up questions without repeating all of the information from your previous messages.

For example:

> Summarize the key issues in this document.

You could then continue with:

> Which three issues require the most immediate attention?

Or:

> Present those issues in a table with recommended actions.

For a different task or topic, consider starting a new conversation with the Assistant.

Creating an Assistant

Depending on your permissions, you may be able to create your own Assistants.

When creating an Assistant, you can define its purpose and configure the capabilities required for the task.

Typical configuration may include:

- **Name** — A clear name describing the Assistant.
- **Description** — A short explanation of what the Assistant is designed to do.
- **AI Model** — The model used by the Assistant.
- **Instructions** — The rules and guidance provided to the AI.
- **Knowledge Base** — Organizational knowledge available to the Assistant.
- **Access** — Users or teams that can use the Assistant.

The configuration options available may vary depending on your organization's AiX configuration and your permissions.

Designing Effective Assistants

An effective Assistant should have a clearly defined purpose.

Rather than creating an Assistant that attempts to perform every possible task, consider creating Assistants for specific business activities.

For example:

General Assistant

> Help users with business questions.

This provides little guidance about how the Assistant should behave.

A more focused Assistant could be:

Contract Review Assistant

> Review business contracts and identify key obligations, important dates, commercial terms, risks, and items requiring further review. Present the findings using a consistent structured format.

Clear instructions help produce more predictable and reusable results.

Sharing Assistants

Depending on your permissions, Assistants may be private or shared with other users or teams.

Before sharing an Assistant, consider whether:

- Its purpose is clearly described
- Its instructions have been tested
- The appropriate AI model has been selected
- Required Knowledge Bases are connected
- Users have access to the required information
- Responses have been reviewed using representative examples

Shared Assistants can help organizations provide consistent AI capabilities across teams and business functions.

Reviewing Assistant Responses

Assistant responses are generated by AI models and should be reviewed appropriately before being used for important business activities or decisions.

Predefined instructions and organizational knowledge can improve consistency and relevance, but they do not guarantee that every response will be complete or accurate.

Important facts, calculations, dates, references, and business decisions should be verified where appropriate.

Assistants and Smartflow

Assistants and Smartflows serve different purposes.

Assistants are primarily conversational. They provide a reusable AI experience where users interact with AI through questions and follow-up messages.

Smartflows are process-oriented. They allow multiple steps, AI operations, business rules, integrations, document processing, and human activities to be combined into a workflow.

Use an Assistant when the activity is primarily conversational.

Use a Smartflow when the activity requires a repeatable sequence of processing steps or business actions.

Next Steps

You may also want to explore:

- **Chat** — Interact directly with available AI models.
- **Knowledge Base** — Work with organizational documents and information.
- **Smartflow** — Create and run AI-powered business workflows.
- **Scheduler** — Run supported processes automatically at defined times or intervals.

1.5 Smartflow

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

It allows business users to create and run repeatable processes that combine AI, documents, data, business rules, integrations, and human activities within a visual workflow.

Instead of performing a series of AI tasks manually, Smartflow allows those activities to be organized into a controlled and reusable business process.

What is a Smartflow?

A Smartflow represents a business process as a sequence of connected steps.

Each step performs a specific activity and can pass its results to subsequent steps.

A Smartflow might:

- Read a document
- Extract information
- Ask an AI model to analyze the content
- Search a Knowledge Base
- Apply business rules
- Generate a report
- Request human review
- Send a notification
- Save or distribute the result

Simple Smartflows may contain only a few steps, while more advanced Smartflows can automate larger business processes.

How Smartflow Works

A Smartflow typically starts with an input, performs a series of processing steps, and produces one or more outputs.

For example:

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

The output of one step can be used as the input to another step.

This allows complex processes to be built from smaller, reusable activities.

Running a Smartflow

To run an existing Smartflow:

1. Open **Smartflow** from the AiX navigation menu.
2. Select the Smartflow you want to use.
3. Review the description and any required inputs.
4. Provide the requested information or files.
5. Select **Run**.
6. Monitor the execution status.
7. Review the results when processing is complete.

Depending on the Smartflow, execution may complete automatically or pause while waiting for a user action, review, or approval.

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

Smartflow Inputs

A Smartflow may require information before it can be executed.

Inputs can vary depending on the purpose of the Smartflow and may include:

- Documents or files
- Text
- User selections
- Parameters
- Dates or other values
- Information retrieved from configured systems

The Smartflow determines which inputs are required before execution can begin.

Smartflow Steps

Each Smartflow consists of one or more connected steps.

A step represents an activity performed during the workflow.

Depending on the capabilities configured by your organization, steps may perform activities such as:

- Reading content
- Processing documents
- Calling an AI model
- Asking questions about content
- Searching organizational knowledge
- Transforming information
- Applying business logic
- Creating documents or reports
- Interacting with external systems
- Sending messages or notifications
- Requesting human action

Each step can use information produced by earlier steps in the Smartflow.

Using AI in a Smartflow

AI processing can be included at different points within a Smartflow.

For example, an AI step might:

- Summarize a document
- Classify information
- Extract important details
- Identify risks or issues
- Compare information
- Generate recommendations
- Create structured content
- Prepare a report

Different AI models may also be used for different steps where appropriate.

The models available to Smartflow depend on your organization's AiX configuration.

Working with Content

Smartflow can process content as part of a business workflow.

For example, a Smartflow could receive a document, read its contents, analyze the information using AI, and generate a new document containing the results.

Content can therefore move through different stages of a workflow as it is processed.

A Smartflow may produce outputs such as:

- Documents
- Spreadsheets
- Presentations
- PDF files
- Structured data
- Text
- Reports
- Notifications

The available input and output formats depend on the tools and capabilities used by the Smartflow.

Human Review and Approval

Not every business process should operate entirely automatically.

Smartflow can include human activities within a workflow so that users can review information or make decisions at appropriate stages of the process.

Depending on the Smartflow and your permissions, you may participate as a reviewer or approver.

A workflow might, for example:

Receive Document → AI Review → Human Review → Approval → Generate Final Output

This allows AI-assisted processing to be combined with appropriate human oversight.

Smartflow Status

While a Smartflow is running, AiX tracks its execution status.

Depending on the workflow, you may be able to see:

- Current execution status
- Completed steps
- Processing steps
- Steps waiting for user action
- Errors or problems
- Generated outputs

This helps users understand where a process is within its execution.

Smartflow Outputs

A Smartflow can produce one or more outputs.

Outputs may include information displayed directly within AiX or files generated by the workflow.

For example, a Smartflow could produce:

- A management summary
- A document review report
- A classification result
- A completed Word document
- An Excel workbook
- A PowerPoint presentation
- A PDF report
- Structured information for another process

Outputs can also be used by subsequent Smartflow steps.

Creating a Smartflow

Depending on your permissions, you may be able to create your own Smartflows.

Smartflows are created using the visual Smartflow designer.

You build a workflow by adding steps and connecting them in the order required by the business process.

A typical design process is:

1. Define the purpose of the Smartflow.
2. Identify the required inputs.
3. Add the processing steps.
4. Connect the steps.
5. Configure each step.
6. Define the required outputs.
7. Test the Smartflow.
8. Review the results.
9. Publish the Smartflow for use.

This allows business processes to be designed without developing a traditional software application.

Designing a Smartflow

Before creating a Smartflow, consider the business process you want to automate.

Start by identifying:

Input — What information starts the process?

Process — What needs to happen to that information?

AI — Where can AI assist the process?

Business Rules — What conditions or decisions need to be applied?

Human Review — Where should a person review or approve the result?

Output — What should the process produce?

For example, a document review process might be designed as:

Upload Document

↓

Read Document

↓

Extract Key Information

↓

AI Review

↓

Verify Results

↓

Human Review

↓

Generate Report

This provides a clear structure before individual Smartflow steps are configured.

Testing a Smartflow

A Smartflow should be tested before it is made available for regular business use.

Testing should include representative inputs and business scenarios.

When testing, consider whether:

- The correct information is being processed
- AI instructions produce the expected results
- Business rules behave correctly
- Required human review steps occur

- Errors are handled appropriately
- Generated outputs contain the required information
- The complete process produces a useful business result

AI-based steps should also be tested with different examples because AI responses may vary depending on the input and selected model.

Publishing and Versions

Smartflows can be updated as business requirements change.

Where versioning is enabled, changes can be maintained separately from published versions.

This allows a Smartflow to be modified and tested before a new version is made available for operational use.

Published versions also help organizations maintain consistency and traceability when Smartflows are used for business processes.

Smartflow Execution History

AiX records Smartflow executions to support operational tracking and auditability.

Depending on your permissions, execution information may include:

- Smartflow version
- Execution status
- Execution time
- Processing steps
- Inputs and outputs
- User activities
- AI interactions
- Errors or exceptions

This information can help users understand how a result was produced and assist with troubleshooting when required.

Smartflow and Assistants

Smartflow and Assistants support different types of AI activities.

Assistant

Designed primarily for conversational interaction.

Smartflow

Designed primarily for repeatable business processes and automation.

For example, an Assistant might help a user interactively review a contract.

A Smartflow might automatically read the contract, extract key terms, perform an AI review, verify selected information, request human review, and generate a standardized report.

Use an **Assistant** when the activity is primarily conversational.

Use a **Smartflow** when the activity follows a repeatable process.

Smartflow and Scheduler

Smartflows can also be used with **Scheduler** where supported.

Instead of requiring a user to manually start a Smartflow, Scheduler can execute supported Smartflows automatically at defined times or intervals.

For example:

Every morning → Retrieve Information → Analyze → Generate Summary → Send Notification

This allows Smartflow to support recurring business processes as well as user-initiated activities.

Good Practices

When working with Smartflows:

- Start with a clearly defined business objective.
- Keep each step focused on a specific activity.
- Use meaningful names for steps and outputs.
- Test with representative business scenarios.
- Include human review where appropriate.
- Verify important AI-generated information.
- Handle exceptions and unexpected inputs.
- Review changes before publishing a new version.
- Keep workflows understandable for other users who may need to maintain them.

A well-designed Smartflow should make the business process easier to understand, execute, and maintain.

Next Steps

You may also want to explore:

- **Chat** — Interact directly with available AI models.
- **Knowledge Base** — Use organizational information with AI.
- **Assistants** — Create reusable conversational AI experiences.
- **Scheduler** — Run supported Smartflows automatically.

1.6 Projects

1.7 Scheduler

Scheduler allows AiX processes to run automatically at a defined date, time, or recurring interval.

Instead of manually starting the same process each time it is required, you can create a schedule and allow AiX to execute it automatically.

Scheduler is particularly useful for recurring business activities such as daily reports, periodic document processing, information monitoring, and regular notifications.

What is Scheduler?

Scheduler controls **when** an AiX process should run.

For example, you might create schedules to:

- Run a Smartflow every morning
- Generate a weekly management report
- Process documents every evening
- Check for new information at regular intervals
- Produce a monthly summary
- Send scheduled notifications

A schedule can be associated with a supported AiX process and configured to execute automatically.

The scheduling options available to you depend on your organization's configuration and your access permissions.

Scheduler and Smartflow

Scheduler and Smartflow work together to automate business processes.

Smartflow defines what should happen.

Scheduler defines when it should happen.

For example, a Smartflow might define the following process:

Retrieve Information → Analyze with AI → Generate Summary → Send Notification

Scheduler can then automatically run that Smartflow every weekday morning.

This separates the business process from its execution schedule, allowing the same Smartflow to be run manually or automatically.

Viewing Schedules

Open **Scheduler** from the AiX navigation menu to view schedules available to you.

Depending on your permissions, you may be able to see information such as:

- Schedule name
- Description
- Scheduled process
- Frequency
- Next execution
- Last execution
- Status

Schedules can typically be enabled or disabled without removing their configuration.

Creating a Schedule

Depending on your permissions, you may be able to create schedules.

To create a schedule:

1. Open **Scheduler**.
2. Select **New Schedule**.
3. Enter a name and description.
4. Select the process or Smartflow to execute.
5. Define when the process should run.
6. Configure any required parameters.
7. Review the schedule.
8. Save and enable the schedule.

Once enabled, AiX will automatically execute the scheduled process according to the defined schedule.

Schedule Types

Depending on your organization's configuration, schedules may be configured to run once or repeatedly.

One-Time Schedule

A one-time schedule runs a process at a specific date and time.

For example:

> Run the Year-End Report Smartflow on 31 December at 6:00 PM.

Recurring Schedule

A recurring schedule runs repeatedly according to a defined frequency.

Examples include:

Daily

> Run every day at 8:00 AM.

Weekly

> Run every Monday at 9:00 AM.

Monthly

> Run on the first day of every month.

Interval

> Run at a defined recurring interval.

The scheduling options available may vary depending on the AiX configuration.

Schedule Parameters

A scheduled process may require information or parameters when it runs.

For example, a reporting Smartflow might require:

- Reporting period
- Input location
- Output location
- Recipient
- Processing options

Where supported, these values can be configured as part of the schedule so that the process can execute without requiring manual input each time.

Example: Daily News Summary

A Smartflow could be designed to retrieve and analyze relevant news.

The process might be:

Retrieve News → Filter Relevant Articles → AI Analysis → Generate Summary → Send Notification

Scheduler could then be configured to run the Smartflow:

> Every weekday at 7:00 AM.

The process runs automatically and produces the required output without a user having to start the Smartflow manually.

Example: Monthly Management Report

A Smartflow could collect information and generate a management report.

The Smartflow might perform:

Retrieve Data → Analyze Results → Generate Charts → Create PowerPoint → Save Output

Scheduler could run the Smartflow automatically on the first business day of each month.

This allows recurring reporting processes to be automated while maintaining a consistent workflow.

Enabling and Disabling a Schedule

A schedule can be enabled or disabled where your permissions allow.

Enabled

The schedule is active and will execute according to its configured timing.

Disabled

The schedule remains configured but will not automatically execute.

Disabling a schedule can be useful when an automated process needs to be temporarily suspended without deleting its configuration.

Editing a Schedule

Depending on your permissions, you may be able to modify an existing schedule.

For example, you might change:

- Execution time
- Frequency
- Scheduled process
- Input parameters
- Start or end date
- Schedule status

Review schedule changes carefully before enabling the updated schedule.

Execution History

AiX maintains execution information for scheduled processes.

Depending on your permissions, you may be able to review information such as:

- Scheduled execution time

- Actual execution time
- Process or Smartflow executed
- Execution status
- Completion time
- Generated outputs
- Errors or exceptions

Execution history can help confirm that scheduled activities have completed successfully and assist with troubleshooting when a scheduled process fails.

Failed Scheduled Runs

A scheduled process may fail if a problem occurs during execution.

For example:

- Required information is unavailable
- A source system cannot be reached
- A file cannot be accessed
- An AI service is unavailable
- A Smartflow step encounters an error

Where available, review the execution details to identify the step or activity that caused the problem.

After resolving the issue, the process may be run again manually or allowed to execute at its next scheduled time.

Scheduling Considerations

Before scheduling a process, consider how frequently it needs to run and whether all required resources will be available at the scheduled time.

For example, consider:

- How long the process normally takes
- Whether required source systems will be available
- Whether required files or information will be ready
- Whether multiple scheduled executions could overlap
- Whether the process uses external AI services or APIs
- Whether human review is required
- Who should review failures or exceptions

Avoid scheduling processes more frequently than required.

Human Activities

A scheduled Smartflow can include human activities.

For example:

Scheduled Start → Retrieve Documents → AI Review → Human Review → Generate Final Report

Scheduler can automatically start the process, but the Smartflow may pause when it reaches a step requiring human action.

The workflow can continue after the required user completes their activity.

This allows scheduled automation to be combined with appropriate human oversight.

Good Practices

When using Scheduler:

- Use clear and descriptive schedule names.
- Schedule processes only as frequently as required.
- Confirm that required inputs will be available.
- Consider the expected execution time.
- Avoid unnecessary overlapping executions.
- Review execution history periodically.
- Investigate failed executions.
- Disable schedules that are temporarily not required.
- Review schedules when the associated Smartflow changes.
- Include human review where appropriate for important business processes.

Scheduler, Smartflow, and Assistants

AiX provides different capabilities for different types of activities.

Assistant

Provides a reusable conversational AI experience.

Smartflow

Defines a repeatable business process.

Scheduler

Determines when a supported process should execute automatically.

Together, these capabilities allow AiX to support both interactive AI use and automated business processes.

For example:

Knowledge Base

Provides the organizational information.



Smartflow

Defines how the information should be processed.



Scheduler

Determines when the process should run.



Human Review

Provides oversight where required.

This allows recurring AI-assisted activities to operate as controlled business processes rather than isolated AI interactions.

Next Steps

You may also want to explore:

- **Smartflow** — Create and run AI-powered business workflows.
- **Knowledge Base** — Use organizational information with AI.
- **Assistants** — Create reusable conversational AI experiences.