GIGGSO
Business-ready Applied AI Solutions

Shay

Shay, v2.0 | User Guide

Prepared by

Giggso Product Team

GIGGSO

Business-ready Applied AI Solutions

Shay

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About Shay

Shay is an out of the box secure Generative AI support system designed to deliver immediate business value.
As an **enterprise-grade solution**, Shay addresses critical challenges such as **collaboration, auditing, and traceability**.

Shay provides a secure, hierarchical collaboration environment that enhances overall productivity and value. Users can effortlessly connect multiple data sources, including local files, cloud storage, databases, and popular applications like Email, Google drive, Google sites, Jira, Trello, and ServiceNow, through Shay's intuitive interface.

Supporting both **private and public Large Language Models (LLMs)**, Shay features our proprietary LLM Firewall, **Protego Armor**, which protects against data exposure, prompt manipulation, and exploit attempts.

Additionally, Shay includes **built-in rules and workflows** to ensure a seamless and efficient work process.

Shay - Business Benefits

Faster Support Ticket Resolution

Shay accelerates ticket resolution by automating workflows, integrating with enterprise tools, and providing AI-driven recommendations. Support teams resolve issues faster, improving efficiency and reducing backlog.

Increased Internal Knowledge Base

Shay continuously learns from past interactions, automatically updating and expanding the internal knowledge base. Teams get instant access to accurate, context-rich information, reducing redundant efforts and improving decision-making.

Reduced Resource Constraints

Shay reduces workload by automating repetitive tasks and streamlining operations, allowing teams to focus on complex, high-value work. With trustworthy AI automation, businesses can scale support operations efficiently while accelerating AI adoption without increasing headcount.

Better Customer Experience

Shay delivers instant, accurate responses through AI-powered automation and self-service. By ensuring reliable and consistent support, Shay fosters customer trust, boosts CES scores, and increases AI-driven adoption for seamless user experiences.

Lower Support Costs

Shay minimizes cost per resolution by automating inquiries, streamlining workflows, and ensuring agents have quick access to trustworthy insights. Businesses lower operational costs while driving greater AI adoption in customer support.

Shay - Features

Integrated LLM-Based Search

Shay leverages advanced Large Language Models (LLMs) to deliver precise and context-aware search capabilities. Users can quickly retrieve relevant information across multiple data sources, enhancing decision-making and efficiency.

No-Code Workflow & Tollgates

Shay simplifies automation with no-code workflows, enabling users to create and manage AI-driven processes effortlessly. Tollgates ensure controlled decision points, improving governance and accuracy in AI-powered operations.

Protego Armor for LLM Security

Shay is fortified with Protego Armor, a security layer that protects LLM interactions from prompt manipulation, data leakage, and adversarial attacks. This ensures safe and reliable AI-powered automation for enterprises.

Dashboard and Analytics

With real-time analytics and intuitive dashboards, Shay offers a centralized view of AI performance, user engagement, and workflow efficiency. Businesses can track key metrics, optimize automation, and make data-driven decisions.

Email Automation

Shay streamlines support operations by automating email responses, ensuring timely and consistent communication. It enables teams to collaborate efficiently by intelligently routing emails, summarizing key insights, and reducing manual workload.

Platform Features

Shay platform organizes everything within a Group. A group is a collection of people, process & technology. Company Admins will create a group then add the chat service (LLM), add users with their roles, connect various data sources and can set up a work process using Shay's built-in rules and workflows.

Current supported Large Language Models (LLMs),

- ChatGPT
- Azure OpenAI
- Gemini
- Cohere AI

** Development of others is in-progress.*

Types of user roles,

- Platform level user roles - Company Admin & Regular User
- Group level user roles - Admin, User & Guest User

Inside each group, there can be n number of topics (classifications) and within a topic, there will be n number of chat sessions.

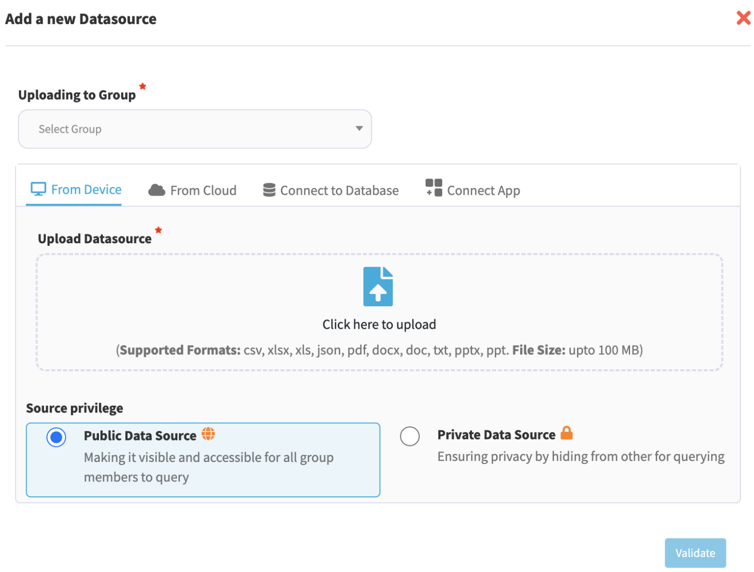
Current supported data sources,

- Local files - csv, xlsx, xls, json, pdf, docx, doc, txt, pptx, ppt. File Size: up to 100 MB.
- From Cloud - S3 & Azure.
- From Database - Oracle, Redshift, MariaDB, Snowflake, PostgreSQL & BigQuery.
- From Apps - Google drive, Google Site, Jira & Email.

** Development of others is in-progress.*

Types of data source privilege

- Public - Making it visible and accessible for all group members to query.
- Private - Ensuring privacy by hiding from others for querying.



The platform also provides a **dedicated data source page** where each user can see all the data sources they have access to from the Groups they are involved with.

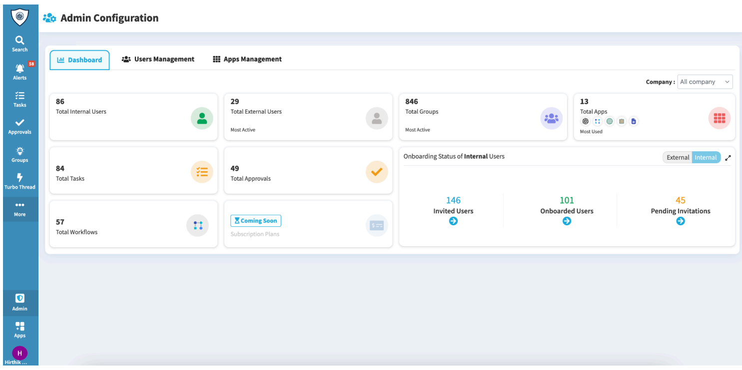
Admin Configuration page:

Platform Admin / Company Admin will have access to the Admin Configuration page where they have control over User management, Apps management, Groups, Data sources connected.

1. After getting a **platform invitation through Email, Click on the "Get Started" button** present in the email

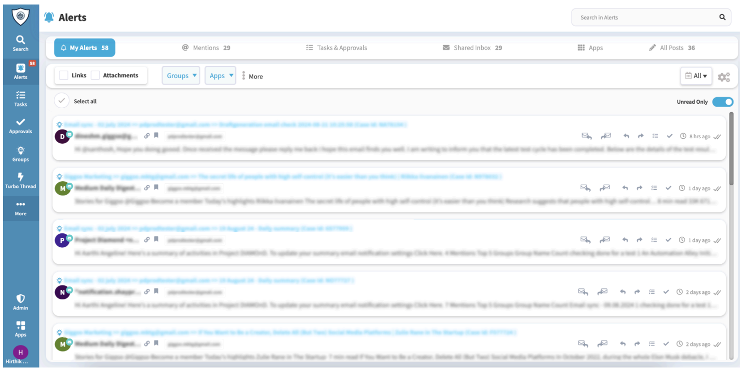
   ***Note**: Ignore this step if you have already signed up to the platform.*

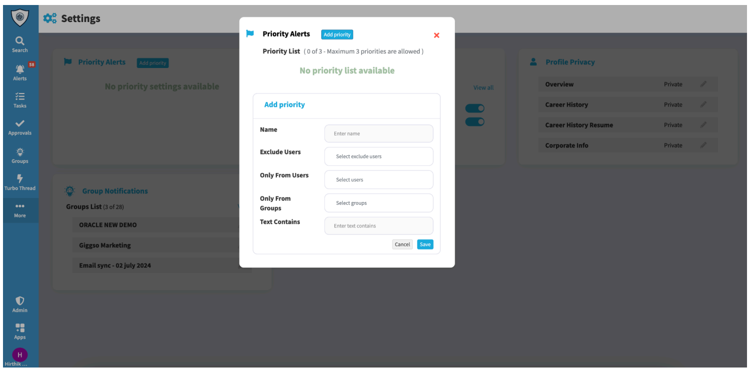
2. Following your onboarding process, If you are an Admin user, Create a Group or use an existing Group. The Group creation consists of the following steps,
   - Name your Group
   - Upload Your Group Image (Optional)
   - Group Description (Optional)
   - Add users to the group with "Add Colleagues to your Group (Optional)".
   - Click "Connect Your App" to integrate apps to your group.
   - Enable Gen AI/LLM
   - Select the chat service you'd like to connect to.
   - Click the "**Validate**" button, and validate your API token.
   - Click "**Create**" to create a group



Alerts page:

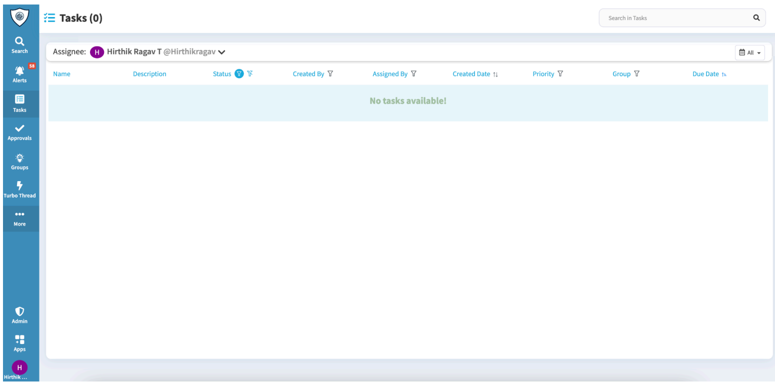
For every action requiring the user's attention, an alert will be sent to the alerts page. Users can configure Priority alerts, which allow them to view preferred alerts based on specified criteria at the top of the page, giving them the highest priority.





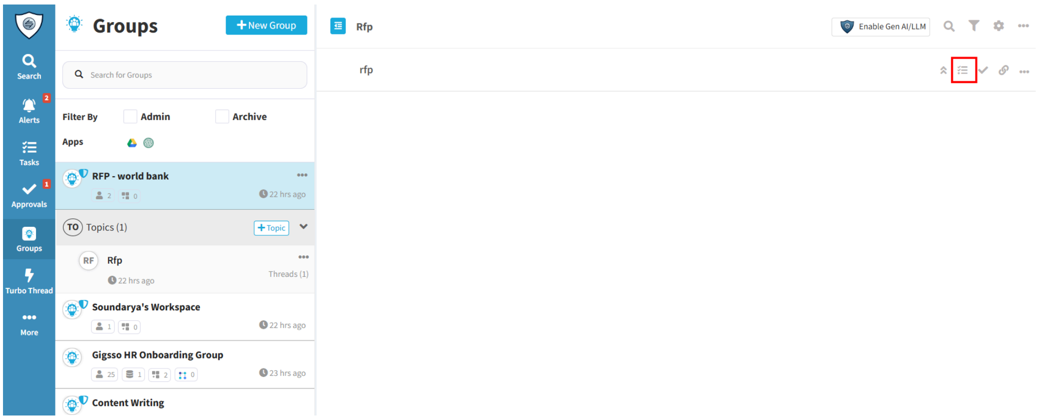
Tasks page:

The tasks page is a dedicated space that consolidates the complete list of tasks with key details for the logged-in user by default. Users can filter through various fields to obtain the desired results and take necessary action for the same.



To create Task

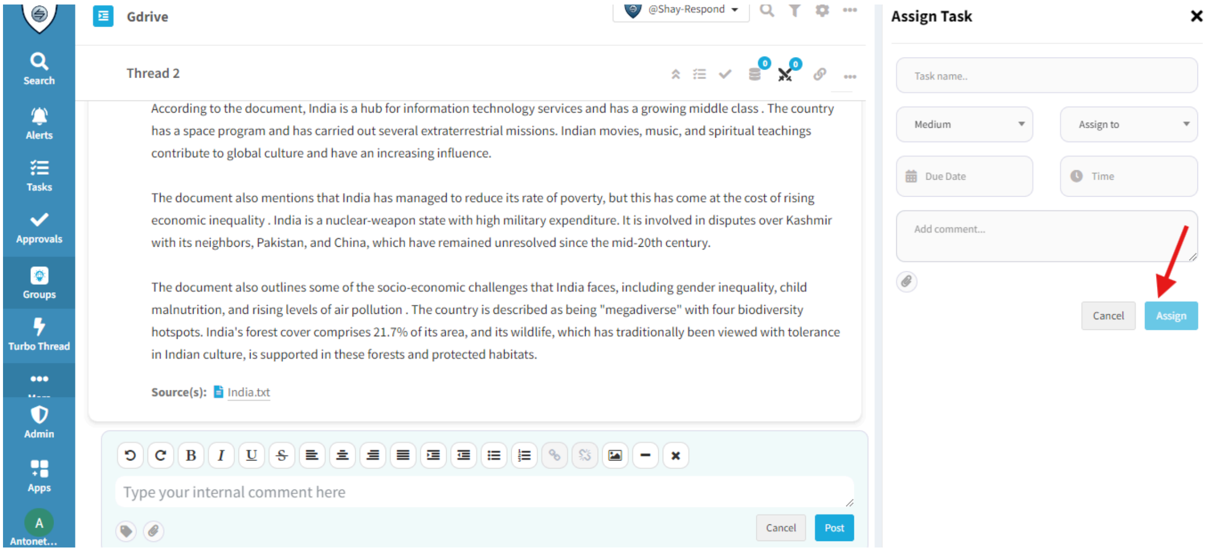
1. Go to Groups and choose a group.
2. Click the Assign task icon



3. The task window opens on the right.

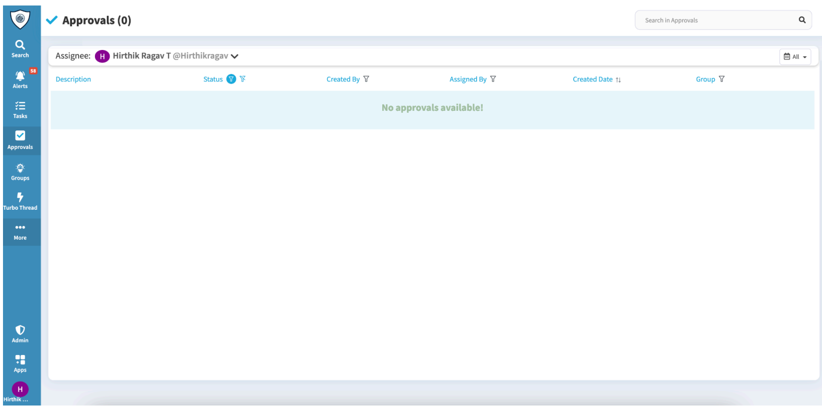
   a. Provide a task name
   b. Select the priority
   c. Choose a member to whom you want to assign the task
   d. Select a due date and time for the task
   e. Add instructions or comments
   f. Add attachments or documents supporting the task
   g. Click Assign to assign a task.

The tasks assigned and their details can be seen under the **Tasks** menu option



Approvals page:

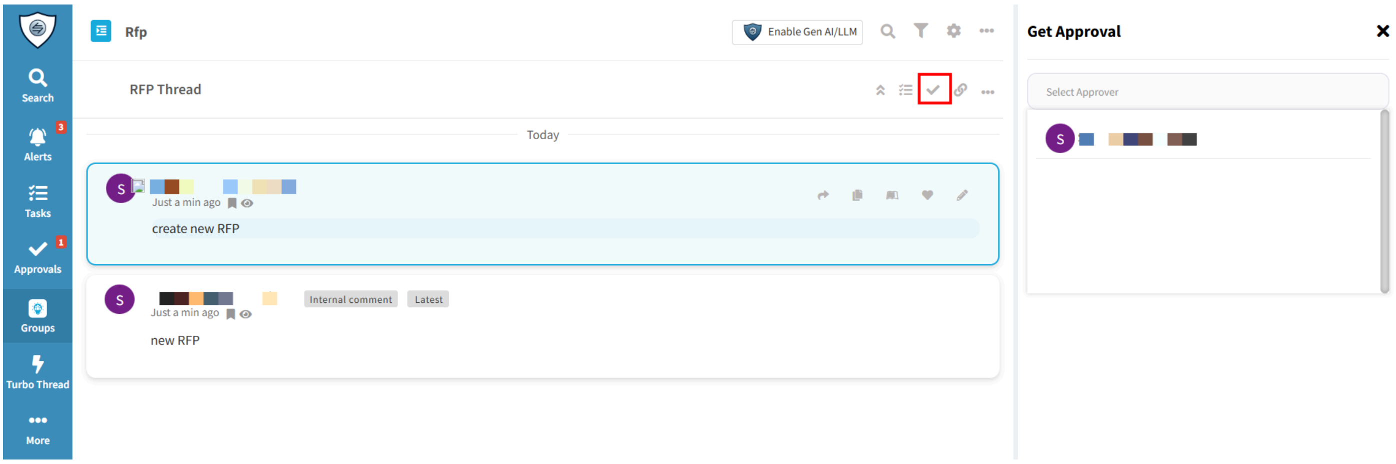
The approvals page is a dedicated space that consolidates the complete list of approvals with key details for the logged-in user by default. Users can filter through various fields to obtain the desired results and take necessary action for the same.



To create Approvals

1. To create threads for approval, navigate to the Groups page.
2. Under any topic of a group, click +New Thread
3. Name your thread and provide content for the thread.
4. Enable Add data source to query form to choose a data source from which you want your answers from
5. Choose one or more data sources and click Create.
6. After a thread is created, you can request for approval from the members of the group. In the options above, click the tick icon to view the approval window. Choose the member to get the approval.
7. The member will receive an email requesting approval.

8. The approvals will be listed on the Approvals page.



Groups page:

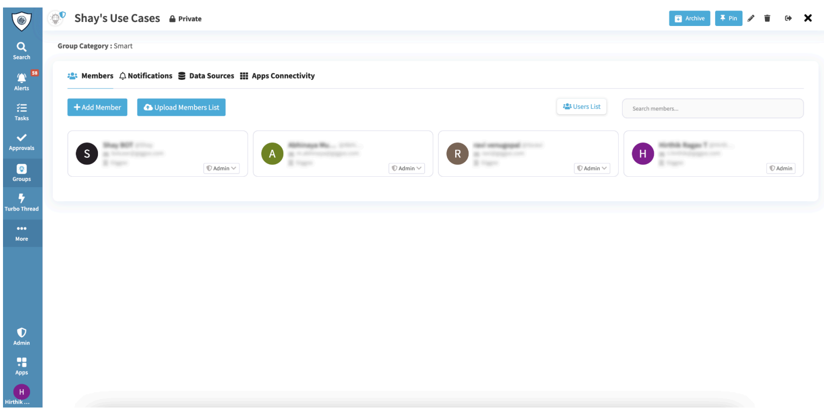
The new and improved group structure of the platform enables internal collaboration among users while leveraging the capabilities of the LLM.

A group comprises people, processes, and technology. Company Admins can create a group, add the chat service (LLM), assign users with specific roles, connect various data sources, and set up work processes using Shay's built-in rules and workflows tailored to the specific use case.

One can assign tasks and approvals to other individuals present in the group, set priority to the chat session which indicates it needs more or immediate attention.

Shay's Group concept provides a significant advantage by enabling internal collaboration while also ensuring auditing, security, and traceability.

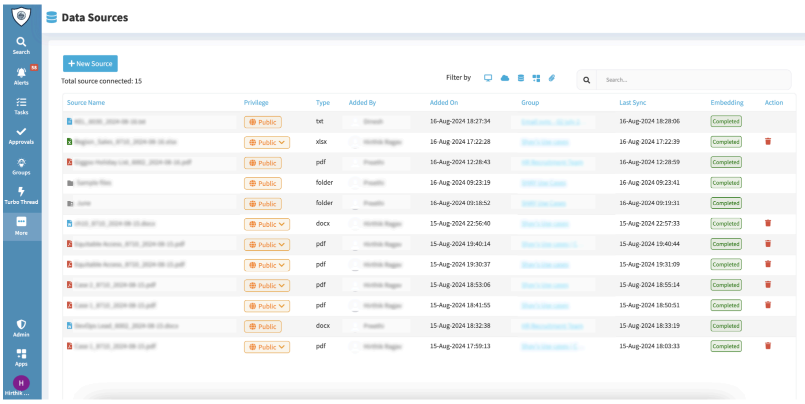
The Groups settings page includes options for managing and configuring users, connected apps, group notifications, data sources, and the creation and management of rules and workflows.



Data Source page:

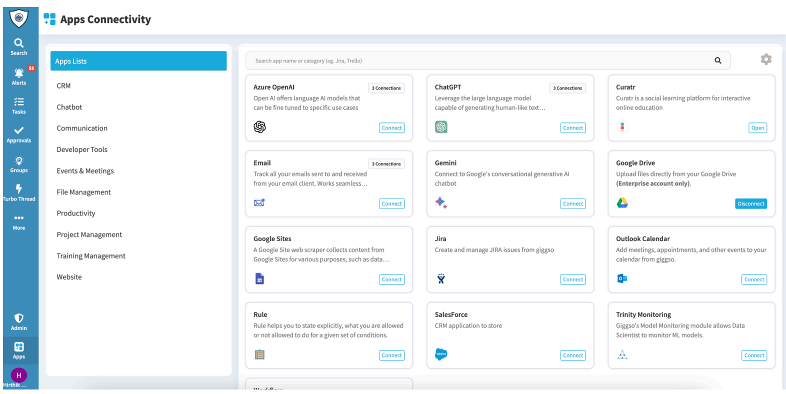
The platform also provides a dedicated data source page where each user can see all the data sources they have access to from the Groups they are involved with along with its key details.

Note: *All data sources should be connected to any particular group*



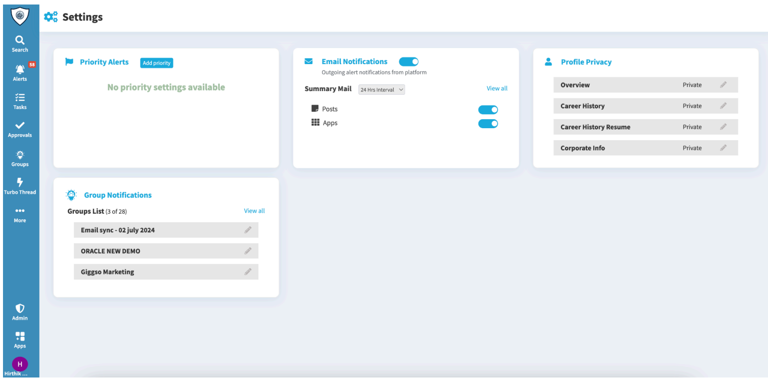
Apps Connectivity Page:

The Apps connectivity page is a dedicated space where users can connect to apps that have been enabled by the company's admins.



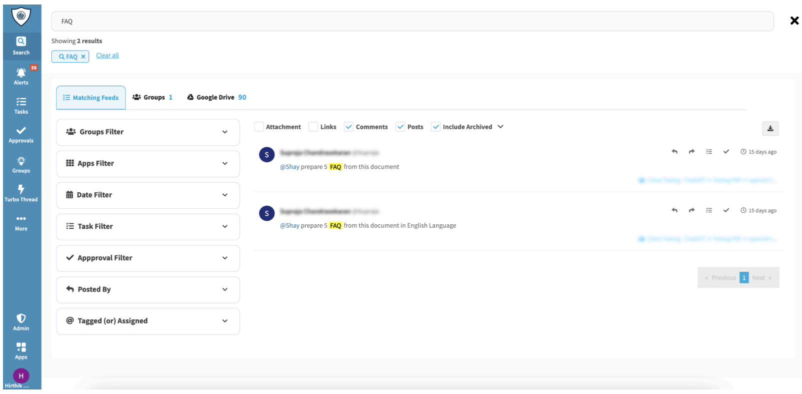
Settings page:

The settings page enables users to configure priority alerts, manage summary email notifications, and customize group notifications based on the actions taken.



Enterprise Search:

The enterprise search feature allows users to search across the entire platform and obtain the desired results.



Other pages:

1. Profile page
2. My Activities
3. My Bookmarks and more..

When can you expect Shay to respond?

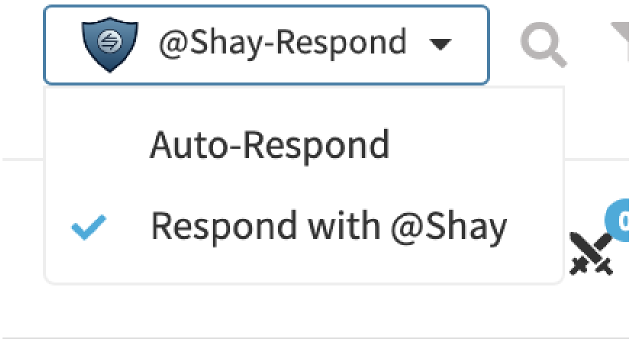
- @Shay-Respond

  When utilizing the "**respond with @Shay option,**" it is expected that you tag Shay **(@Shay)** whenever you want a response or wish to leverage the capabilities of a language model to generate results.

- Auto-Respond

  This option allows users to **simply enter their queries and receive responses** without needing to use specific keywords like "@Shay" to activate the language model's capabilities.

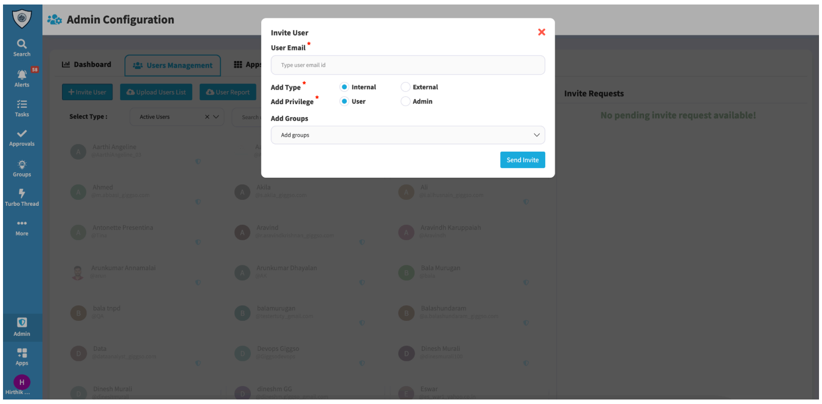
  Think of Shay Bot as a co-worker; you can engage in conversation in the thread or chat session, and Shay Bot will provide a response by drawing on its knowledge base.

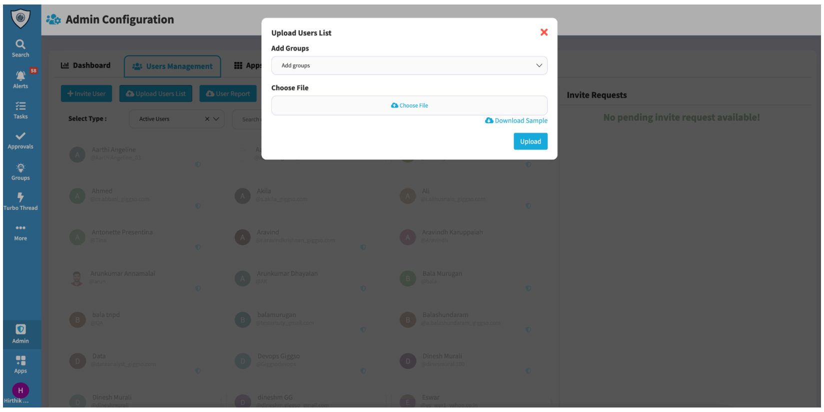


How can you invite a user into the platform?

Through Admin Config,

- Go to the **Admin Configuration page.**
- Select the **User Management tab** and click on the **"Invite User"** button
- Enter the **email address, select user type & user privilege along with the groups** to which the user must be a part off and invite them.
- For **bulk invite** - Click on the **"User Upload List"** Button.
- **Upload the list** (refer to the sample file provided there) then **select the groups** to which the users must be added and invite them.

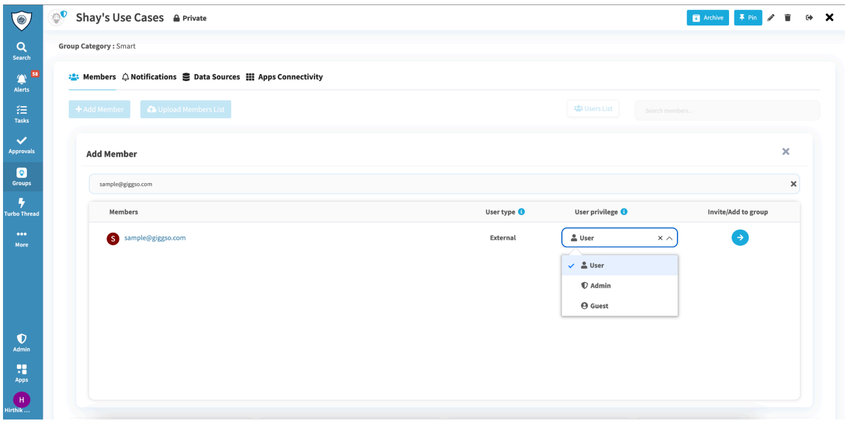




Through Group Settings,

- Go to the **Group Setting page.**
- Select the **Members tab** and click on the **"Add Members"** button.
- Enter the **email address and provide the privilege** required and invite them.
- For **bulk invite** - Click on the **"Upload Member List"** Button.

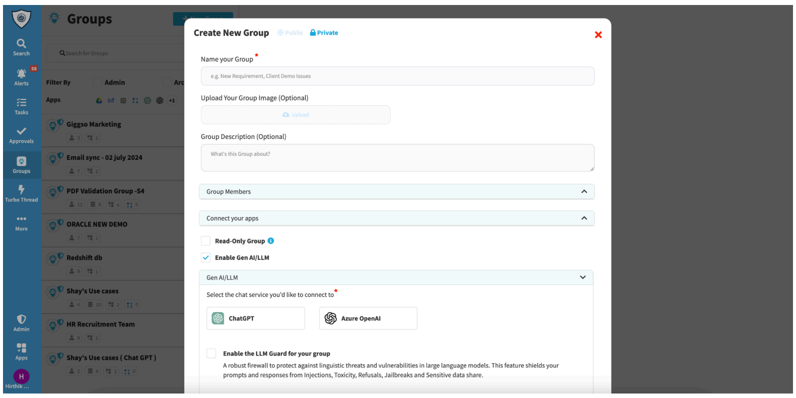
- **Upload the list** (refer to the sample file provided there) then **choose the user type**, and invite them.



How can you create a group?

- Go to the Groups Page.
- Click on the "New Group" Button.
- Provide the needed information like the group's name & description.
- Add members and connect the required apps to the group.

- If needed, Checkmark the "Read-Only group" option - The users will be given a predefined set of data sources and thread/chat session to work with.
- Checkmark the "Enable Gen AI/ LLM" option to leverage the use of LLM and GenAI.
  - Select the needed Chat Service from the options and proceed with the required information.
  - By enabling the LLM Guard - You will be able to use the potential of Protego Armor, which protects against data exposure, prompt manipulation, and exploit attempts.
- Once the group is created, You can proceed to create topics and threads (Chat sessions) within it.

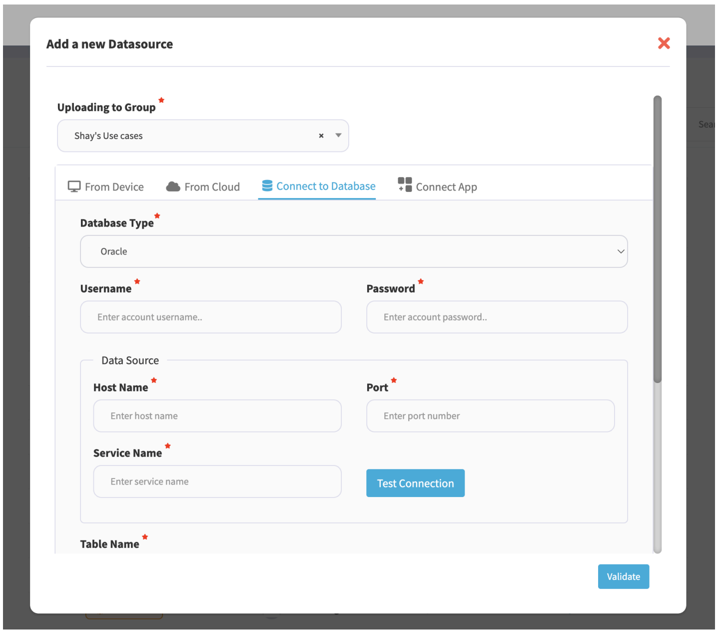


How can you connect the Oracle ERP tables and query it?

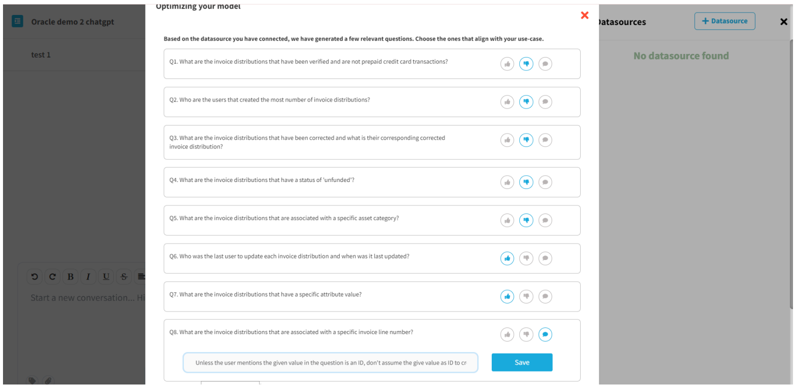
Through Datasource Page,

- Once you are in the **Datasource page**, Click on the **"+ New Source"** button.
- **Select the Group** from the dropdown.
- Go to the **"connect to database"** tab and select **Oracle** from the Database type dropdown.
- **Enter the necessary information** and **test the Oracle DB's connection**.
- **Select the required tables** from the dropdown and **provide the context files** for the same (refer to the samples).
- Select the **data source privilege**.
- Proceed with **Validation and connect the DB.**

  The embedding process **will** be initiated soon.



Meanwhile, you will be provided with the **prompt feedback based on the DB's data for configuring the business case. Provide feedback & edit them and enter the business rules** depending on the use case for the scalability purposes.



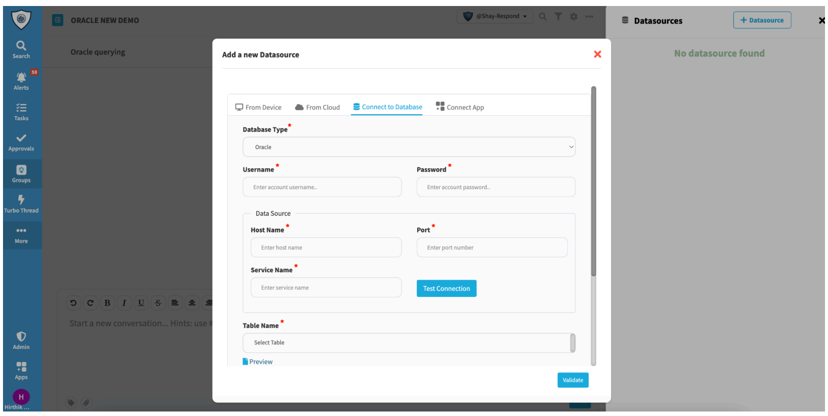
Once the **embedding process is completed**, you will be able to **query from the Oracle DB** by adding it to the thread/chat session.

Through Thread / Chat session Page,

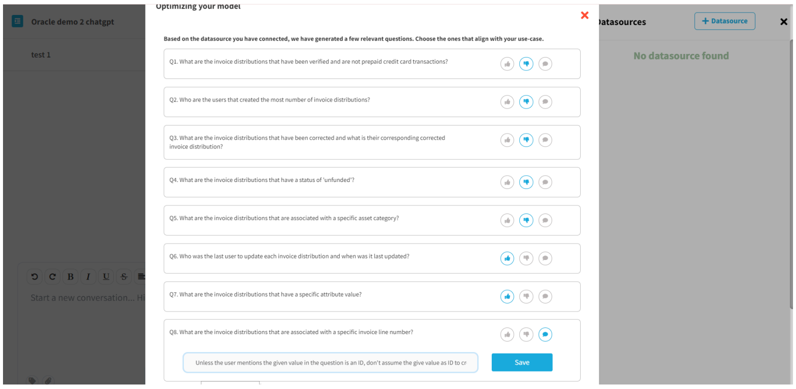
- Click on the **Datasource icon** on the top right.
- Click on the **"+ Datasource"** button.
- Click the **"connect to database"** option.
- Select **Oracle** from the Database type dropdown.
- **Enter the necessary information** and **test the Oracle DB's connection**.
- **Select the required tables** from the dropdown and **provide the context files** for the same (refer to the samples).

- Select the **data source privilege**.
- Proceed with **Validation and connect the DB.**

  The embedding process will be initiated soon.



Meanwhile, you will be provided with the **prompt feedback based on the DB's data for configuring the business case. Provide feedback & edit them and enter the business rules** depending on the use case for the scalability purposes.



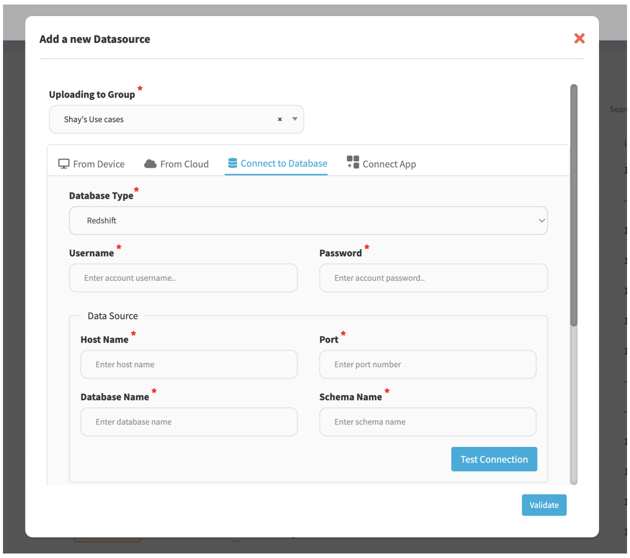
Once the **embedding process is completed**, you will be able to **query from the Oracle DB** from the current thread/chat session.

How can you connect the Redshift EDH tables and query it?

Through Datasource Page,

- Once you are in the **Datasource page**, Click on the **"+ New Source"** button.
- **Select the Group** from the dropdown.
- Go to the **"connect to database"** tab and select **Redshift** from the Database type dropdown.
- **Enter the necessary information** and **test the Redshift DB's connection**.
- **Select the required tables** from the dropdown and **provide the context files** for the same (refer to the samples).
- Select the **data source privilege**.
- Proceed with **Validation and connect the DB.**

  The embedding process will be initiated soon.



Meanwhile, you will be provided with the **prompt feedback based on the DB's data for configuring the business case. Provide feedback & edit them and enter the business rules** depending on the use case for the scalability purposes.

Once the **embedding process is completed**, you will be able to **query from the Redshift DB** by adding it to the thread/chat session.

Through Thread / Chat session Page,

- Click on the **Datasource icon** on the top right.
- Click on the **"+ Datasource"** button.
- Click the **"connect to database"** option.
- Select **Redshift** from the Database type dropdown.

- **Enter the necessary information** and **test the Redshift DB's connection**.
- **Select the required tables** from the dropdown and **provide the context files** for the same (refer to the samples).
- Select the **data source privilege**.
- Proceed with **Validation and connect the DB.**

  The embedding process will be initiated soon.

Meanwhile, you will be provided with the **prompt feedback based on the DB's data for configuring the business case.**

Provide feedback & edit them and enter the business rules depending on the use case for the scalability purposes.

Once the **embedding process is completed**, you will be able to **query from the Redshift DB** from the current thread/chat session.

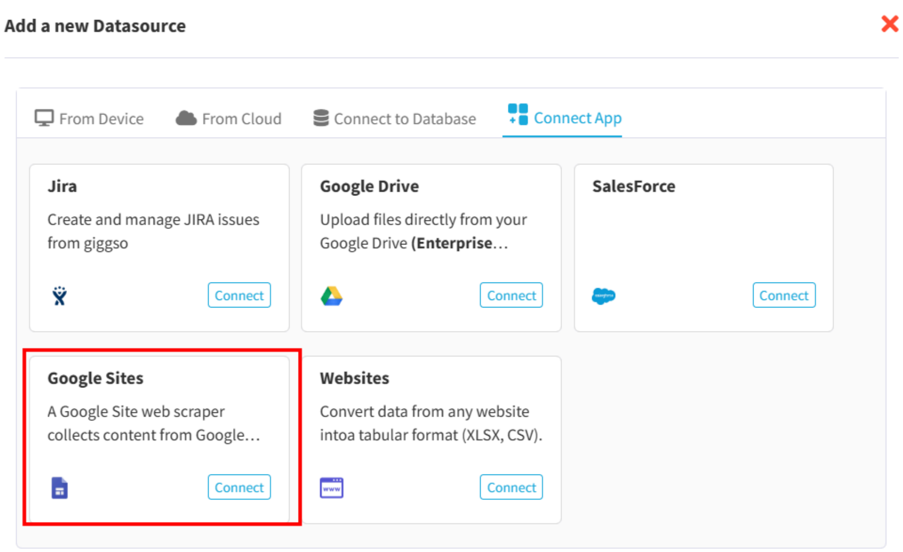
How can you connect Google Site and query it?

Through Datasource Page,

- Go to the **"More" in the left panel and select "Data Sources"**
- Click on the **"+ New Source"** button and click the **"Connect App"** option.
- Select **"Google Sites"**.and click "**Connect**"
- **Provide the required details** for establishing the connection for the required Google Site.
    - Email ID/Username
    - Password
    - Secret Access Key
- Enter the **website URL** along with selecting the required **scraping level (Level 3)** and the **scheduler configuration** for updating the data collected from the google site.
- Select the **data source privilege**.
- **Select the group(s)** to which you want to add the data source (Google Site).
- Click on the **"Connect"** button to complete the progress.

  The embedding process will be initiated soon.

Once the **embedding process is completed**, you will be able to **query from the Google Site app** by adding it to the thread/chat session.



Once the **embedding process is completed**, you will be able to **query from the Google Site** by adding it to the thread/chat session.

Through Thread / Chat session Page,

Create a thread and start querying from the Google Site.

Chat session creation consists of the following steps,

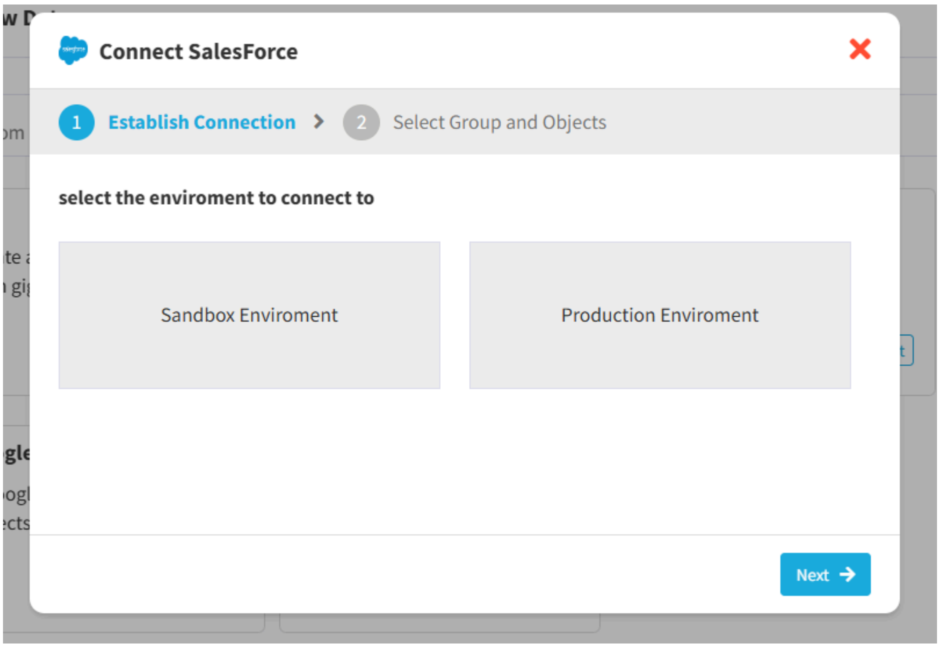
- After a group is created, create a conversational topic and thread within it by entering the necessary details.
- Click on the data source icon on the top, Click "**+ Datasource**" and **select "Existing sources", then click the required Google Site(s)** which you want to query under the **"From Apps**" tab.
- **Enter the prompt/question** and wait for Shay to respond.

How can you connect Salesforce and query it?

Through Datasource Page,

1. To connect **"Salesforce Objects**"

- Click on the **"+ Add Source"** button and click **"From Apps"** option.
- Select **"Salesforce"**.
- Choose the **environment of the salesforce account** which is to be connected.
- You will be taken to the Salesforce SSO page.
- Upon **completing the SSO**, you will be taken back to Shay's Interface.
- Select **salesforce objects** as required.
- Select the **data source privilege**.
- Select the **group(s)** to which you want to add the data source (Salesforce).
- Click on the **"Save & Complete"** button to complete the progress.



The embedding process will be initiated soon.

- Enter the business rules that are needed.
- **Select the group(s)** to which you want to add the data source (Google Site).

- Click on the **“Connect”** button to complete the progress.

  The embedding process will be initiated soon.

- Enter the business rules that are needed.

Once the **embedding process is completed**, you will be able to **query from the Salesforce app** by adding it to the thread/chat session.

Through Thread / Chat session Page,

Create a thread and start querying from the Salesforce Objects

Chat session creation consists of the following steps,

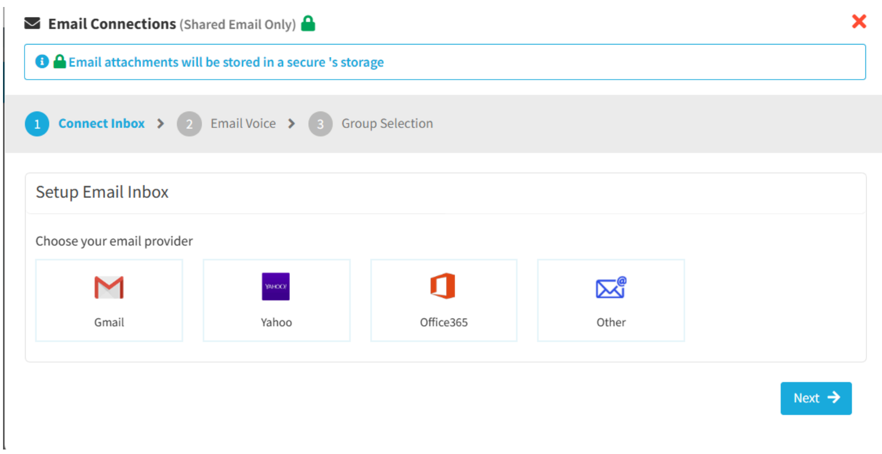
- After a group is created, create a conversational topic and thread within it by entering the necessary details.
- Click on the data source icon on the top, Click "**+ Datasource**" and select **“Existing sources”**, then click the required **Salesforce Object(s)** which you want to query under the **“From Apps**" tab.
- **Enter the prompt/question** and wait for Shay to respond.

How can you set up a Shared Inbox?

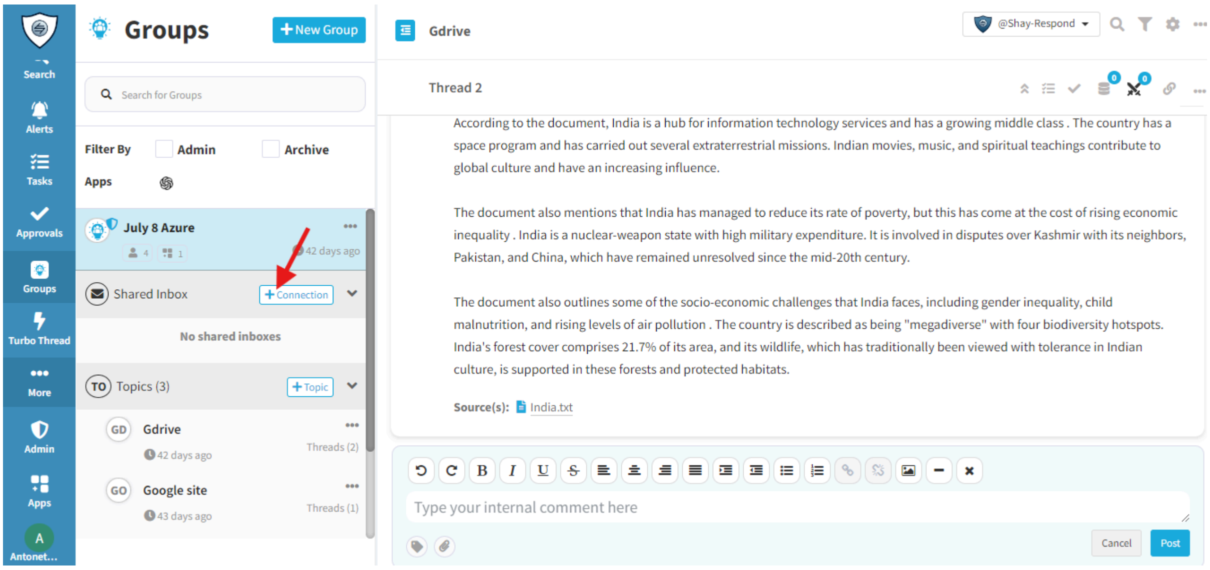
In the Groups page, we can add an “email” app to groups to facilitate shared inbox functionality.

To add email to any Group,

1. Select “Apps” from the left panel
2. Select ‘Email’ from the “Apps Connectivity” page
3. Select the required email connection and enter the required credentials



4. In the Groups page, select ‘Connections’ under ‘Shared Inbox’ of the Group



5. From the overlay window that appears, choose your email provider and enter the email address to validate.