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# Enterprise AI Hub Nexus

## User Guide

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# 1. Overview

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Enterprise AI Hub Nexus is a secure, AI-powered knowledge and productivity platform built for OLIVER Agency. It gives every employee a single place to ask questions, retrieve company policies, summarise documents, draft content, and interact with Microsoft 365 data — all without leaving the browser.

## Key Capabilities

- **RAG Chat** — ask natural-language questions grounded in the company knowledge base with source citations.
- **Personal Assistant** — read emails, calendar events, OneDrive files, SharePoint content via M365.
- **Knowledge Base Management** — admins upload PDFs, DOCX, XLSX, web pages; indexed automatically.
- **Multi-language** — ask in any language; AI responds in the same language.
- **Department & Region scoping** — content filtered to your team and location.
- **Document summaries** — every document gets an AI-generated summary vector for better discovery.

**Supported browsers:** Chrome 110+, Edge 110+, Firefox 115+, Safari 16+. A stable internet connection is required.

## 2. Getting Started — Login & Authentication

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Enterprise AI Hub Nexus uses your existing Microsoft 365 account (Azure AD / Entra ID). No separate password is needed.

### 2.1 Logging In

- Step 1.** Open the portal URL provided by your administrator.
- Step 2.** Click the "**Sign in with Microsoft**" button on the login page.
- Step 3.** You will be redirected to the Microsoft sign-in page. Enter your company email and password.
- Step 4.** Complete Multi-Factor Authentication (MFA) if prompted.
- Step 5.** You are redirected back to the portal and signed in automatically.

### 2.2 Microsoft 365 Consent (Personal Assistant)

To allow the AI to read your emails, calendar and files you must grant consent once. You will see a prompt the first time you use Personal Assistant mode:

- Click "**Connect Microsoft 365**" in the sidebar.
- Review the requested permissions (read-only: Mail, Calendar, Files).
- Click "**Accept**" in the Microsoft consent dialog.
- Your access token is held only for the current session. Nothing is stored permanently.

**Privacy note:** The platform reads your M365 data on-demand, only when you ask a question. No personal data is added to the shared knowledge base.

## 3. Navigation & Interface

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The interface consists of a **sidebar** (left), a **chat panel** (centre), and an optional **context panel** (right).

### 3.1 Sidebar Items

Item	Function
Chat	Start or continue a conversation.
New Chat	Clear conversation and begin a new session.
History	Browse past conversations (last 30 days).
Knowledge Base	View indexed documents (read-only for regular users).
Settings	Language, theme (light/dark), font size.
Admin	Admin panel — document upload, users, departments (admin only).

### 3.2 Chat Modes

Mode	Best for	Data sources
RAG Chat	Company policies, HR, procedures	Knowledge Base (Qdrant vector search)
Personal Assistant	Your emails, calendar, OneDrive files	Microsoft Graph API (read-only)
General AI	Open-ended questions, writing, analysis	LLM only — no company context

## 4. AI Chat Assistant

### 4.1 Asking Questions

Type your question in the input box and press **Enter**. The assistant searches the knowledge base, generates a grounded answer, and shows inline source citations.

#### Good question examples:

- "What is the annual leave policy for UK employees?"
- "How many sick days am I entitled to?"
- "What is the process for submitting an expense report?"
- "Who is the HR contact for the APAC region?"
- "Summarise the parental leave policy."

### 4.2 Understanding the Answer

Each answer includes a **Sources** section listing document names and, where available, a direct SharePoint link. If no relevant information is found the system will say so rather than hallucinate.

### 4.3 Follow-up Questions

The assistant remembers the current conversation context:

- "Can you summarise that in bullet points?"
- "What about for part-time employees?"
- "Translate that to French."

### 4.4 Terminology Matching

The search engine automatically bridges UK / US English terminology differences. Asking about 'vacation' will also search for 'annual leave', 'holiday', and 'PTO' — so you always get results regardless of how your company

documents are written.

### 4.5 File Attachments

Upload a file (PDF, DOCX, XLSX, TXT) directly in the chat to ask questions about its content. Attached files are processed temporarily and not added to the shared knowledge base.

## 5. Knowledge Base

The knowledge base is the collection of company documents the RAG Chat draws from. Regular users can browse it; Admins can add, remove, or re-index content.

### 5.1 Supported Document Types

- **PDF** — policies, handbooks, forms. Scanned PDFs are processed via OCR (LlamaParse).
- **DOCX / DOC** — Word documents.
- **XLSX / XLS** — Excel spreadsheets (all sheets indexed).
- **PPTX / PPT** — PowerPoint presentations.
- **TXT / CSV** — plain text and tabular data.
- **Web pages** — any public URL can be scraped and indexed.
- **SharePoint** — documents imported directly from SharePoint document libraries.

### 5.2 Document Statuses

Status	Meaning
Pending	File uploaded, waiting in processing queue.
Processing	Text extraction and AI embedding in progress.
Completed	Document indexed and available for RAG search.
Failed	Processing error. Check error message; use Reprocess button.

### 5.3 Re-processing Documents

- A **Refresh icon** appears next to any Failed or 0-chunk document. Click it to re-queue that document.
- Click **"Re-index All"** in the Documents table header to re-embed all completed documents (useful after model upgrades or embedding changes).

## 6. Personal Assistant & M365 Integration

In **Personal Assistant** mode the AI can read your Microsoft 365 account data using read-only Graph API calls.

Action	Example question
Read emails	"Show my unread emails from today"
Summarise thread	"Summarise the conversation with John about the Q4 report"
Read calendar	"What meetings do I have tomorrow?"
List OneDrive files	"List my recent OneDrive documents"
Search SharePoint	"Find the Q4 budget spreadsheet on SharePoint"

**Note:** The assistant can only *read* your data. It cannot send emails, delete files, or modify your calendar.

## 7. Language & Regional Settings

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- Ask questions in any language — the AI responds in the **same language**.
- The retrieval engine expands queries across UK / US English terminology automatically.
- Set your UI language in **Settings** → **Language**.
- Regional document scoping (APAC, EMEA, UK, US) is configured per-user by an administrator.

## 8. Admin Panel

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The Admin panel is available to users with **super\_admin** or **content\_manager** roles. Access it from the sidebar.

### 8.1 Upload Documents

- Go to **Admin** → **Knowledge Base** → **Upload Document**.
- Drag and drop files or click to browse. Multiple files are supported.
- Optionally set **Department** and **Region** tags.
- Click **Upload All**. Up to 4 files are uploaded in parallel.
- Duplicate files (same content hash) are detected and skipped automatically.
- Processing status updates every 5 seconds.

### 8.2 Import from SharePoint

- Go to **Admin** → **Knowledge Base** → **Import from SharePoint**.
- Browse your connected SharePoint sites and document libraries.
- Select files and click **Import Selected**.
- Documents are queued for processing immediately.

### 8.3 Add URL

- Go to **Admin** → **Knowledge Base** → **Add URL to Knowledge Base**.
- Enter the URL and an optional description.
- Click **"Scrape & Index"**.
- The page content is extracted, chunked, and added to the knowledge base.

### 8.4 User Management (Super Admin only)

- Go to **Admin** → **Users** to view, invite, and manage user roles.
- Roles: **super\_admin** (full access), **content\_manager** (knowledge base), **user** (chat only).
- Department and region assignment controls which documents each user can search.

## 9. Tips & Best Practices

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- **Be specific:** 'What is the parental leave policy in the UK?' gives better results than 'leave policy'.
- **Use follow-ups:** Start broad, then narrow down in subsequent messages.
- **Check sources:** Verify important HR or legal information against the linked source document.
- **New chat for new topics:** Avoid context confusion by starting a fresh session.

- **Large documents:** Ask the admin to index them for faster, more accurate responses.
- **Report issues:** Use the thumbs-down button if an answer seems incorrect.

## 10. Troubleshooting

Problem	Solution
Cannot log in	Use your company Microsoft 365 account. Contact IT if the issue persists.
"No relevant documents found"	The knowledge base may not contain this information. Ask your admin to upload related documents.
Personal Assistant not working	Click 'Connect Microsoft 365' and grant the required permissions.
Answer seems outdated	The document may not have been re-indexed. Ask your admin to reprocess it.
Slow responses	Large searches may take 5–15 seconds. Check your internet connection if longer.
Session expired	Sessions last 8 hours. Log in again — your history is preserved.
Wrong language response	The AI mirrors your language. If it responds in the wrong language, rephrase your question.

**Support:** For technical issues raise a ticket in the internal helpdesk. Include a screenshot and the time of the issue to speed up resolution.