STANDARD BUSINESS EDITION

Chat with Your Business Documents

Build a private AI document assistant with AnythingLLM



INSIDE THE GUIDE

Prepare documents • Ask better questions • Verify answers
Business use cases • Privacy & access • 30-day pilot

READ FIRST

A business guide you can put to work

Choose a useful task, organise the evidence and decide whether a private document assistant improves the work.

This edition is written for business owners, managers, process owners and department teams. AnythingLLM is the application used to organise documents, connect AI models and prepare answers. This guide explains document-based questions and draft preparation, with an emphasis on sources, review, ownership and a measured pilot.

What the book delivers

The main text contains 50 numbered content pages in ten chapters. The cover, reader guide, two contents pages and two reference pages bring the complete edition to 56 pages. About 15,000 words of main content are supported by worked examples, 21 explanatory figures, department prompts and reusable records.

How to read it

Read chapters 1 to 4 before your first practice task. Use chapter 5 for department patterns and chapter 6 for answer review. Sponsors can focus on chapter 8 and the pilot decisions in chapter 9. Keep chapters 7 and 10 with the IT and document owners.

> **SCOPE AND EXAMPLES**
>
> Cedar Works, its policies, supplier terms, targets and financial figures are fictional training material. Business workflows and templates are recommendations. Product statements are linked to official documentation checked on 26 October 2026. No particular installation, model or hardware configuration was tested for this book.

Editorial and visual notes

This is an expanded business edition based on the two supplied PDFs. It is an adoption and operating guide, rather than a command-line installation manual. Original AI-generated cover and interior artwork is conceptual; it is not a screenshot or evidence of deployed functionality. Technical diagrams and charts are typeset with exact labels and explicitly illustrative data.

Printed page numbers match the PDF page order. The contents and bookmarks link to each topic. The running header links back to the contents. Numbered references link to the source notes at the end.

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CHOOSE USEFUL WORK / 01

Choose a problem worth solving

Employees often know that an answer exists somewhere in the business. The difficult part is finding the right document, deciding whether it is current, and carrying its conditions into the next task. A private document assistant can help with that sequence. Its value comes from completing useful work with less searching and rework.

This book follows Cedar Works, a fictional business with an HR team, a purchasing desk and an operations function. Staff repeatedly ask about travel claims, supplier terms and approved procedures. The company begins with a travel-policy assistant because the question volume is visible and HR can judge the answers.

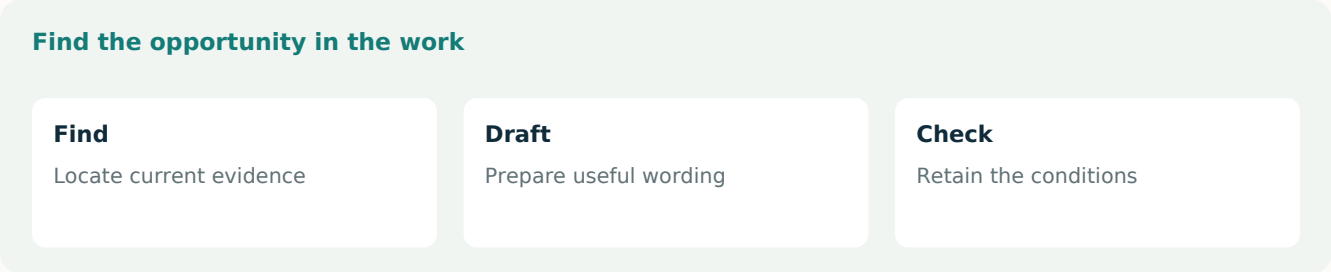


FIG 01 Search effort, draft effort and review effort all count.

Define an outcome people can observe

Replace a broad ambition such as “introduce AI” with a task statement. Identify the employee, the recurring question, the approved source and the output they need. Specify who checks the result and what remains outside the assistant's authority. A narrow task makes both improvement and failure easier to see.

> **EXAMPLE BRIEF**
> Cedar Works employees need a short explanation of domestic travel rules, supported by the current policy. HR owns the source and handles exceptions. The pilot measures complete-task time and evidence quality before more users join.

Ask whether the underlying problem is actually poor document organisation. A clearer policy page or a maintained FAQ may solve it more cheaply. The assistant deserves investment when language varies, related information is scattered, or drafting from several approved sources consumes substantial effort.

Leave this page with a decision

Write one sentence describing the work that should become easier. If nobody can explain how a correct result will be recognised, clarify the process before selecting software. The first deliverable is a useful business problem with an owner.

CHOOSE USEFUL WORK / 02

Select a manageable first use case

A good pilot has enough repetition to measure, enough documentation to answer from, and a reviewer who understands the work. Popularity alone is a weak selection rule. A request may be frequent because the policy is contradictory or because every case needs individual judgement.

Score candidate tasks together with their owners. Use 0 for absent, 1 for partly ready and 2 for ready. This is a planning aid, not a mathematical risk model. A high total must never override a serious access problem or an unavailable source.

Readiness question	What earns a score of 2
Does the task recur?	Several comparable tasks can be observed during the pilot.
Is the evidence usable?	Approved documents contain a reasonably clear answer.
Can someone judge it?	A named owner can write expected answers and exceptions.
Is review practical?	The reviewer can check the output in the normal workflow.
Can errors be contained?	A wrong draft can be caught before a consequential action.

Apply a separate stop rule

Do not begin if the collection contains information the proposed users must not see, if no owner can resolve conflicting rules, or if the workflow would bypass an approval. These are prerequisites, not items to compensate for with a higher score elsewhere.

For Cedar Works, travel-policy lookup scores well. Automatic supplier selection does not: proposal terms may be incomplete, approvals differ by purchase, and commercial judgement remains necessary. Comparing stated terms can still be an appropriate smaller task.

> **YOUR WORKING CHOICE**
>
> List three candidate tasks. Score their readiness. Choose one only after naming the source owner, reviewer and stopping condition. Keep the other two in a backlog so the first pilot stays measurable.

Record why the task was selected. That short explanation helps later when stakeholders ask to add unrelated documents or turn a draft into an automatic decision.

CHOOSE USEFUL WORK / 03

Map the work before adding AI

Measure the current task as people actually perform it. Begin when the employee receives a question and stop when an approved answer or usable draft is ready. Include the time spent locating files, checking versions, interpreting conditions and correcting the response.

Compare the whole workflow

Today	Find	Interpret	Draft	Check
Assisted	Retrieve	Draft	Check	Correct

FIG 02 Measure from the question to a checked result, including correction.

Observe complete tasks

Ask two or three users to walk through recent examples. Note which document they opened, how they knew it was current, what they copied, and where they sought help. Separate active working time from waiting time. An assistant might reduce searching while leaving an approval queue unchanged.

Current step	What the pilot changes	What still needs an owner
Locate the policy	Search approved passages	Which policy is authoritative
Interpret the rule	Produce a cited explanation	Applicability and exceptions
Draft a response	Suggest wording	Accuracy and audience fit
Obtain approval	Prepare evidence for review	The approval itself

Identify the handoff

The most useful output may be an evidence table, rather than a long answer. If HR needs a section reference and an exception flag, ask for those explicitly. Avoid an attractive output format that adds work when copied into the team's normal tools.

> **BASELINE RECORD**
>
> For each example, retain task type, source version, active minutes, review minutes, corrections and final outcome. Use an internal task identifier instead of copying personal details into the measurement log.

Cedar Works discovers that employees spend more time checking whether a policy is current than composing replies. It therefore adds policy ownership and effective dates to the document register before testing prompts. The finding changes the process as much as the technology.

CHOOSE USEFUL WORK / 04

Set the boundary of the assistant

A document assistant can retrieve evidence, explain a passage and prepare a draft. Giving it a business name does not grant it the authority of a manager, accountant or policy owner. State that distinction in the pilot brief and in user training.

Use three practical categories. Supported work has approved sources and a feasible review. Review-required work may be useful but contains judgement, calculations or exceptions. Excluded work cannot be completed safely within the current purpose and permissions.

Category	Cedar Works example	Required handling
Supported	Explain the stated claim-submission steps	User checks the cited policy.
Review required	Apply the policy to an unusual itinerary	HR reviews the circumstances.
Excluded	Approve reimbursement or change payroll	Follow the existing authorised process.

Separate information from action

“Prepare a claim checklist” and “submit the claim” are different requests. The second changes a system or creates a commitment. This book begins with information and drafts. If the business later introduces tools that write records or send messages, those actions need their own design, permissions and evaluation.

The same distinction applies to external sharing. A useful internal draft can contain material that must not be sent to a supplier or customer. The reviewer checks both factual accuracy and whether the intended recipient may receive the content.

> **SCOPE STATEMENT TO ADAPT**
>
> The assistant supports internal questions and draft preparation from the named collection. It does not approve claims, interpret employment rights, make purchasing commitments or change business records. The existing process owner retains those decisions.

Make refusal useful

Give users a route forward when a request falls outside scope. Name the responsible team, the information it will need and the approved contact route. A clear handoff is more useful than either an invented answer or an unexplained refusal.

CHOOSE USEFUL WORK / 05

Give the pilot clear ownership

Useful assistants depend on several kinds of responsibility. One person may hold more than one role in a small company, but the responsibilities still need to be explicit. Otherwise a source error becomes an IT ticket and a technical failure becomes a policy dispute.

Role	Owns	Evidence of readiness
Sponsor	Purpose, resources and expansion decision	Approved brief and budget limit
Business process owner	Workflow and approval rules	Defined task and review boundary
Document owner	Current sources and interpretation	Register and approved expected answers
IT service owner	Configuration, access and continuity	Service record and tested recovery
Users and reviewers	Appropriate use and evidence checks	Completed practice exercise

Write a short agreement

The sponsor should approve the purpose and decision date. The document owner should confirm the active collection. IT should identify the supported environment and its limits. Reviewers should agree how to record errors and when to stop using a result.

For Cedar Works, the HR lead owns the travel policy, a department manager sponsors the pilot, and IT supports the shared service. The assistant itself is never listed as an accountable approver. This prevents the phrase “the AI said so” from replacing a real decision.

> **REUSABLE PILOT BRIEF**
>
> Problem and users: _____. Approved sources and owner: _____. Intended output: _____. Excluded actions: _____. Reviewer: _____. Environment and IT owner: _____. Baseline and acceptance measures: _____. Review date and decision owner: _____.

End chapter one with a working brief

Keep this agreement to one or two pages. Link supporting documents rather than copying every procedure into it. If the pilot changes audience, source sensitivity or actions, update the brief and have the responsible owners review the change. That keeps the project concrete as interest grows.