

# SYNOPTIX AI APPLICATION

## USER MANUAL

### Login/Signup

Welcome to the Synoptix AI login/signup tutorial. In this guide, we will walk you through the different methods for accessing Synoptix AI application. You can log in with Microsoft, Google or your company's email and password.

### Step-by-Step Guide

#### Accessing the Login Page

To begin, go to the Synoptix AI login page by:

- Opening your web browser
- Enter the provided URL from your organization
- You'll be taken to synoptix.ai login page, where multiple login options will be available.

#### Log in with Microsoft or Google account

For organizations using Microsoft services, you can log in with Microsoft or google account by following these steps:

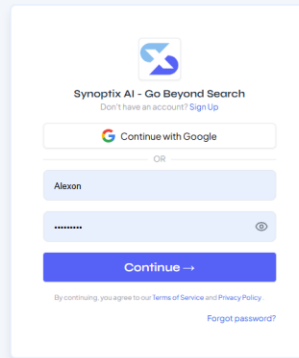
1. On the login page, click the "Continue with Microsoft or Google" button.
2. You will be redirected to the sign in page.
3. Enter your Microsoft/ Google email address and password.
4. Once successfully authenticated, you'll be sent back to Synoptix AI and logged into your account.

#### Log in with your Email and Password

If you already signed up to Synoptix AI, you can log in using your email and password. To do so:

1. On the login page, enter your email in the "Email" field.
2. Enter your password in the "Password" field.
3. Click the "Login" button.

4. If your credentials are correct, you'll be logged in. If not, an error message will appear, and you can try logging in again.

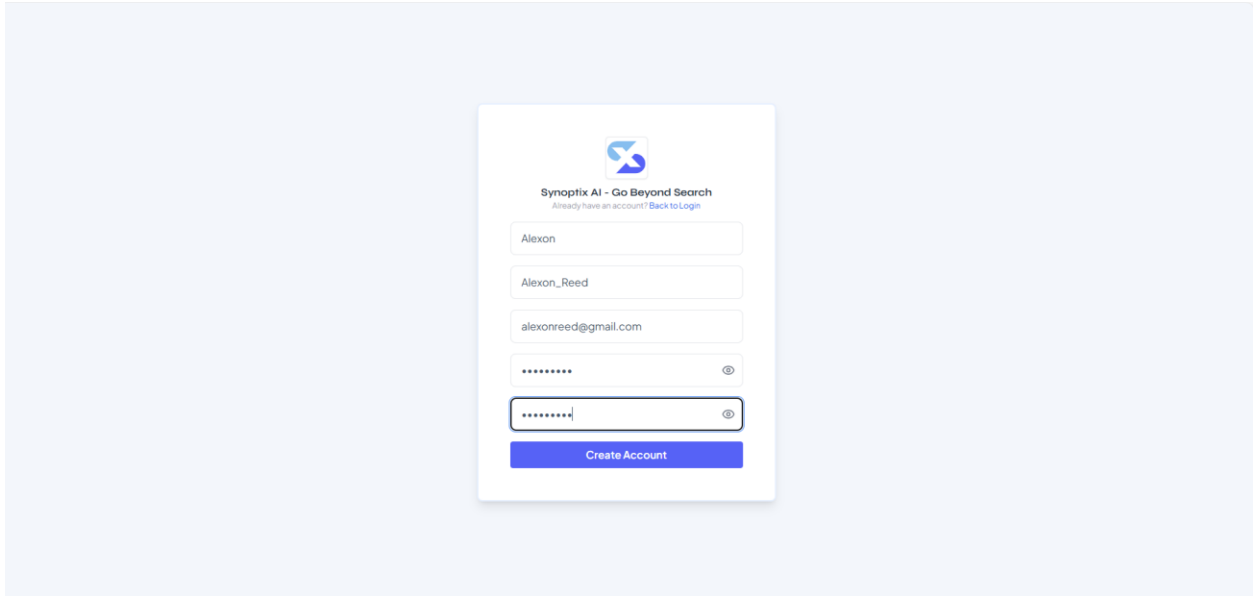


The image shows a login form for Synoptix AI. At the top is the Synoptix AI logo, a blue square with a white 'X' shape. Below the logo is the text 'Synoptix AI - Go Beyond Search' and a link 'Don't have an account? Sign Up'. The form has a 'Continue with Google' button with the Google logo. Below that is the text 'OR'. There are two input fields: one for the name 'Alexon' and one for a password, represented by asterisks. Below the password field is a blue 'Continue ->' button. At the bottom, there is a small link 'By continuing you agree to our Terms of Service and Privacy Policy.' and another link 'Forgot password?'.

## Sign Up

If you don't have a Synoptix AI account, create one from scratch.

1. Click Sign Up, then enter your name, email address and password.
2. Click 'Create Account'.
3. A verification email will be sent to your email address.
4. Verify your account to complete the registration, and you will be automatically logged into the Synoptix AI application.



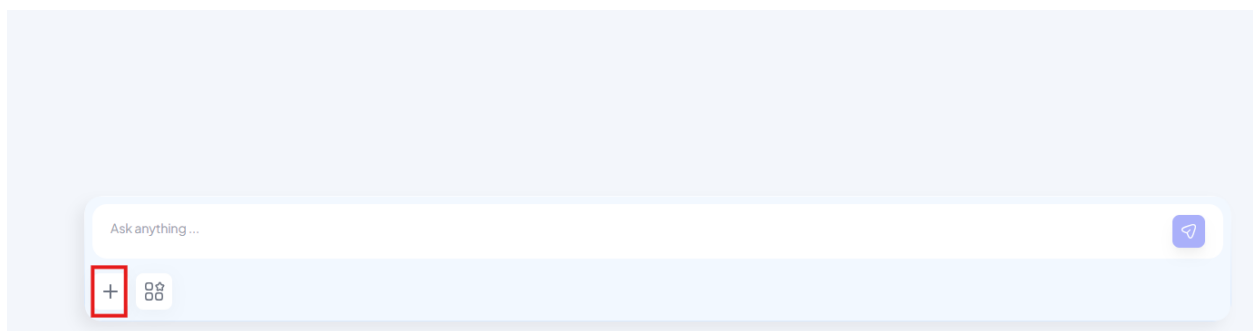
## Search

This guide enables your team to search and retrieve accurate information from every data source, document, spreadsheet, and presentation using natural, everyday language.

It brings answers together in seconds, without the need to manually sift through files or systems.

## Upload Document

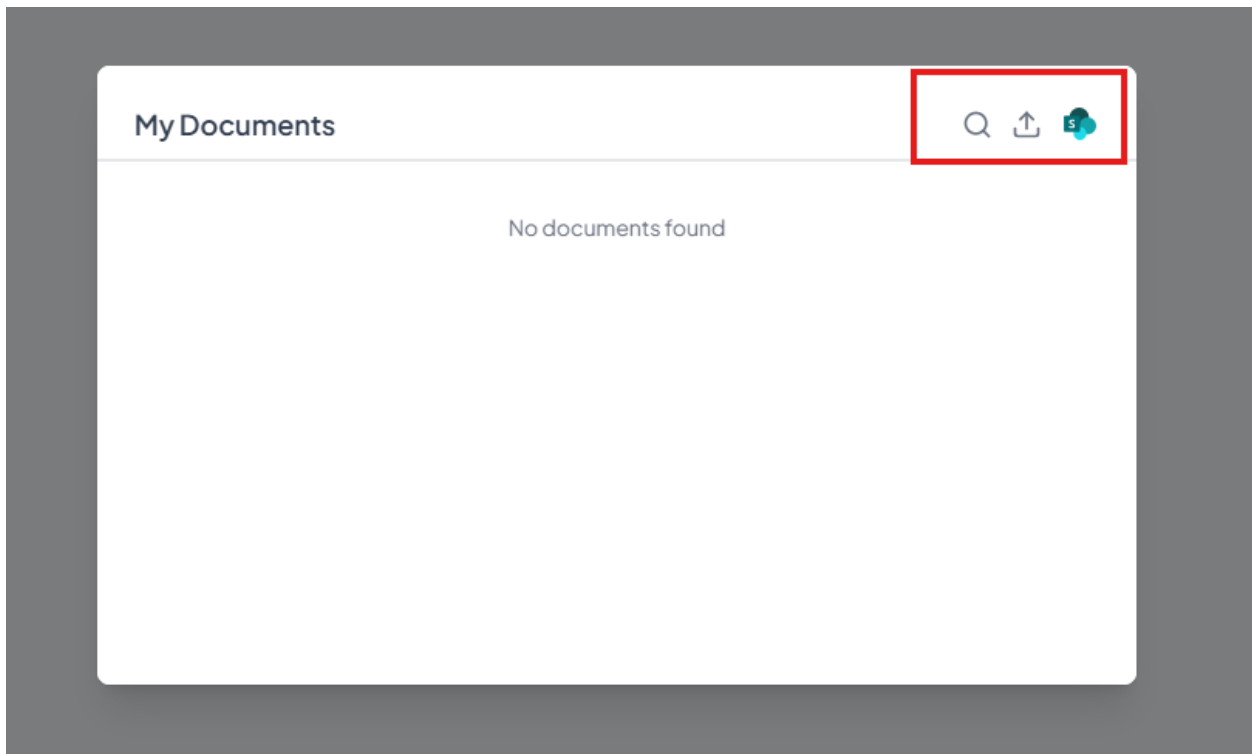
1. Click the **file upload** icon at the bottom.



2. The system opens your personal document list.
3. If you haven't uploaded anything yet, you'll see the message **No documents found**.

No documents found

4. In the top-right corner, you can:
  - a. Search for documents
  - b. Upload files from your computer
  - c. Import files from SharePoint



5. Click the **upload icon** (an arrow pointing upward) and select the file you want to add.

6. To upload from SharePoint, click the **SharePoint icon** and select the file you want to import.
7. Multiple file formats are supported including **PDF, Word (DOCX), Excel (XLSX), PowerPoint (PPTX), HTML, JPEG/JPG, PNG, TIFF and HEIF.**

## Multi-content data processing

Synoptix AI provides intelligent multi-content document processing that goes beyond simple text extraction. The platform is designed to analyze complete documents, including embedded images, tables, charts, and graphical elements, and transform them into structure and meaningful insights.

### What Is Multi-Content Document Processing?

Multi-content document processing in Synoptix AI refers to the ability to:

- Process **multiple document types** simultaneously
- Extract and analyze **textual and visual content** together
- Understand **graphs, charts, images, and layouts** within documents
- Provide a detailed **description** of visual content compared to traditional text processing only

### Supported File Formats

Synoptix AI supports a wide range of commonly used document formats:

- **PDF (.pdf)**
- **Word documents (.docx)**
- **Excel spreadsheets (.xlsx)**
- **PowerPoint presentations (.pptx)**
- **Image files (e.g., JPG, PNG)**

### Activate Multi-Content Data Processing (Upgrade /Top-Up)

Multi-content document processing is available as an **upgrade (top-up)**.

1. **Go to Settings**  
Navigate to the **Settings** section from the left sidebar.

## 2. **Select Intelligent Data Processing**

Locate the **Intelligent Data Processing** option under available upgrades or add-ons.

## 3. **Add Upgrade or Top-Up**

Enable the feature by adding it to your current plan.

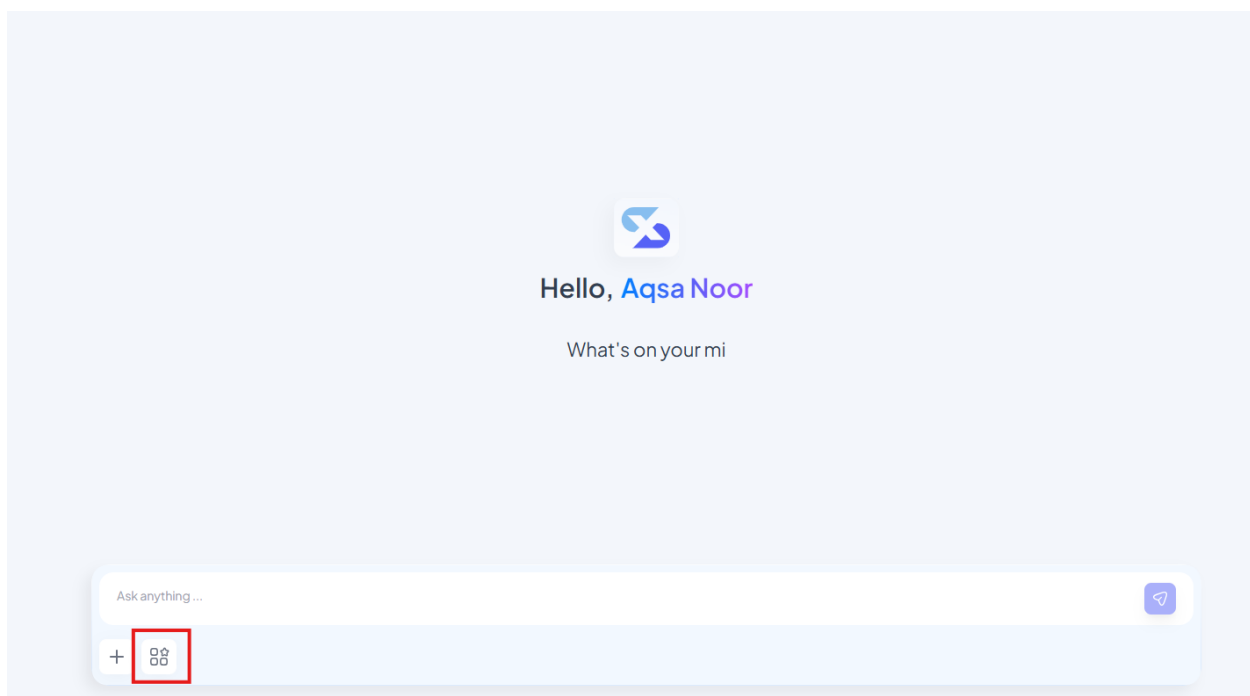
Once activated, your account will immediately support intelligent document processing capabilities.

## **Tools and Connections**

Next to the **file upload** icon, you'll find the Tools and Connections option. This section lets you connect to external platforms and enable additional tools for your AI assistant. Each connection allows the system to read, search, or retrieve information from that source.

## **How to use Tools and Connections**

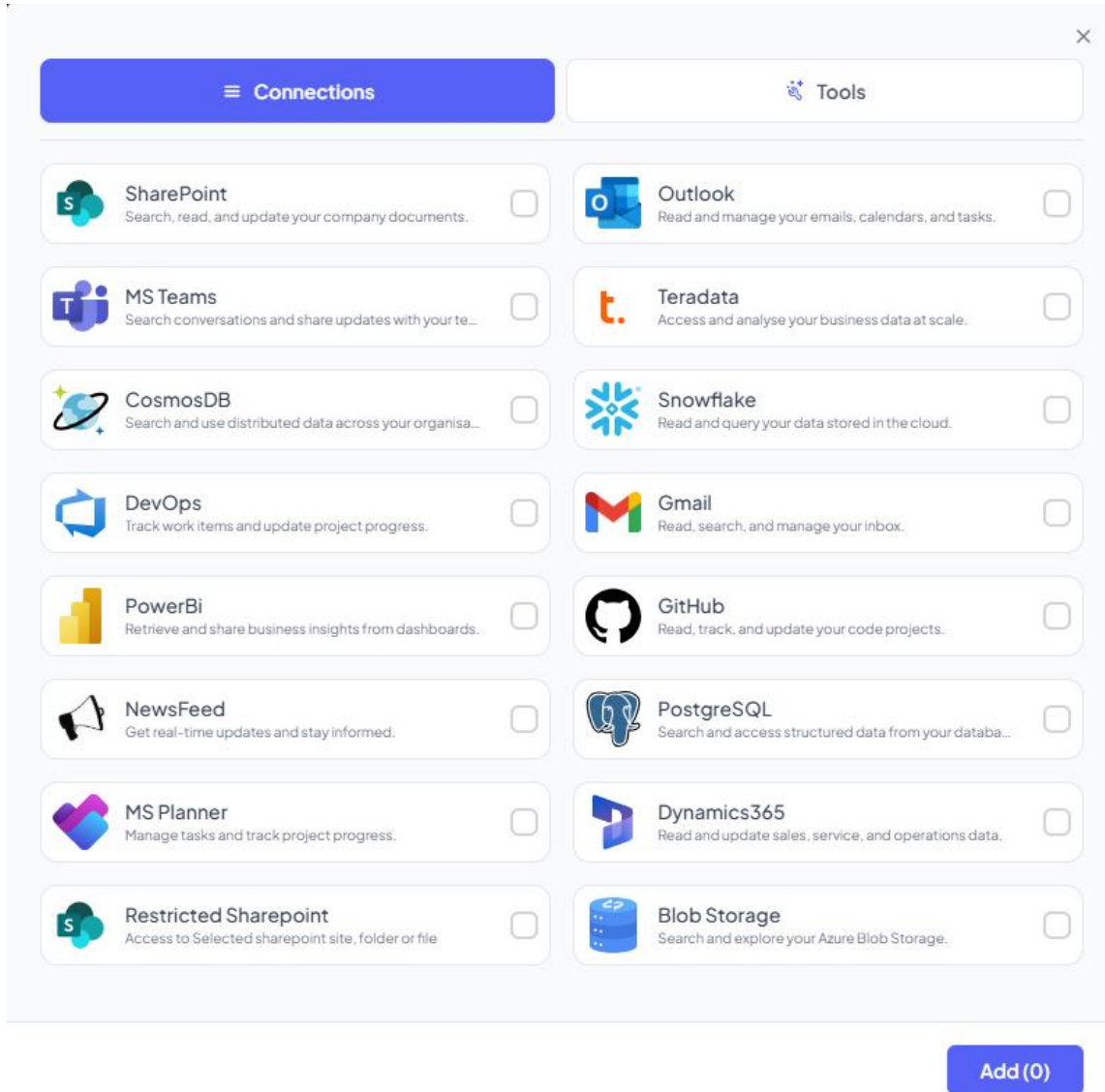
1. Click the **Tools and Connections** icon.



2. A window will appear showing two tabs: **Connections** and **Tools**.

## Connections

These are the platforms you can connect to. Once connected, the AI assistant can search, read, or fetch data from them.



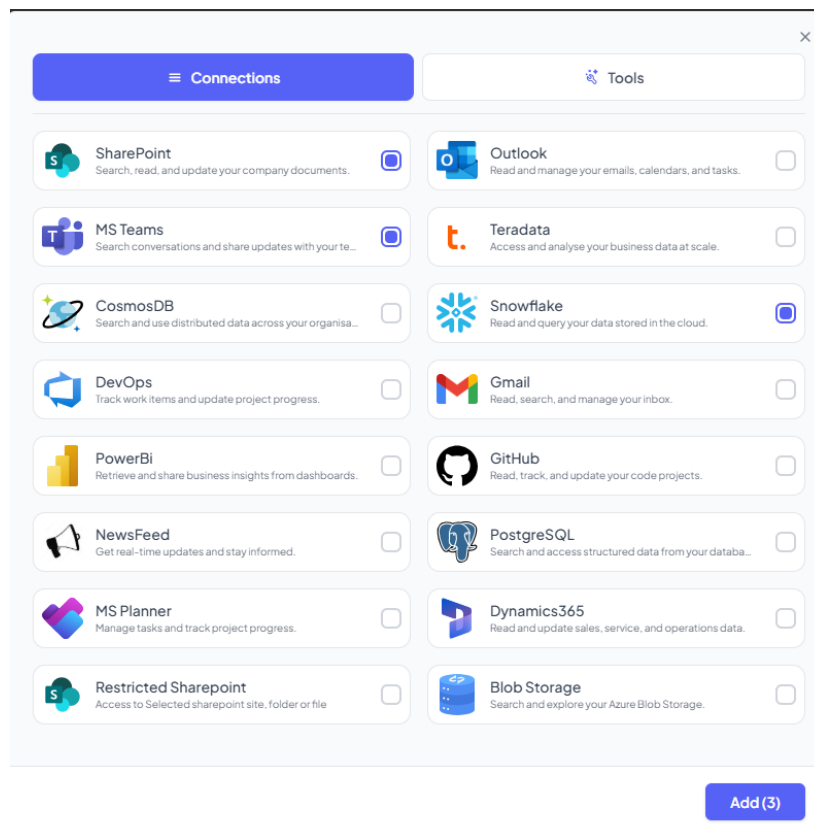
### Available Connections:

- **SharePoint:** Search, view, and fetch company data.
- **MS Teams:** Search conversations and shared messages.
- **CosmosDB:** Query distributed organisational data.
- **DevOps:** Get project/sprint updates and create work items.
- **Power BI:** Retrieve dashboards and business insights.
- **NewsFeed:** Receive real-time updates.

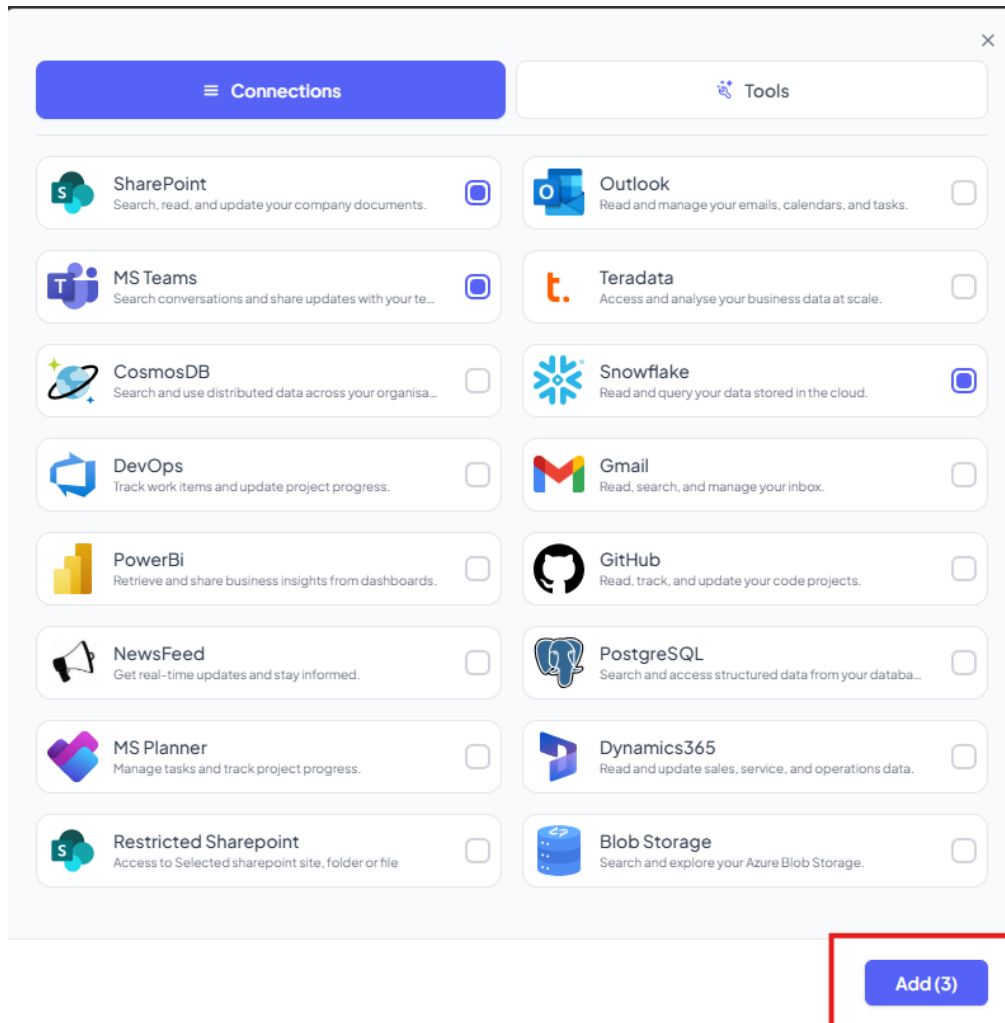
- **MS Planner:** Manage tasks and get project progress.
- **Restricted SharePoint:** Access to a specific SharePoint folder or secure site.
- **Outlook:** Draft and sent emails, follow-ups and schedule and send meeting invites.
- **Teradata:** Analyse large-scale business data.
- **Snowflake:** Access cloud-hosted data.
- **Gmail:** Search and view email messages.
- **GitHub:** View repositories, commits, and code updates.
- **PostgreSQL:** Run queries on structured database data.
- **Dynamics 365:** Access CRM data including sales and operations.
- **Blob Storage:** Search and explore Azure Blob Storage files.

### How to enable an MCP connection:

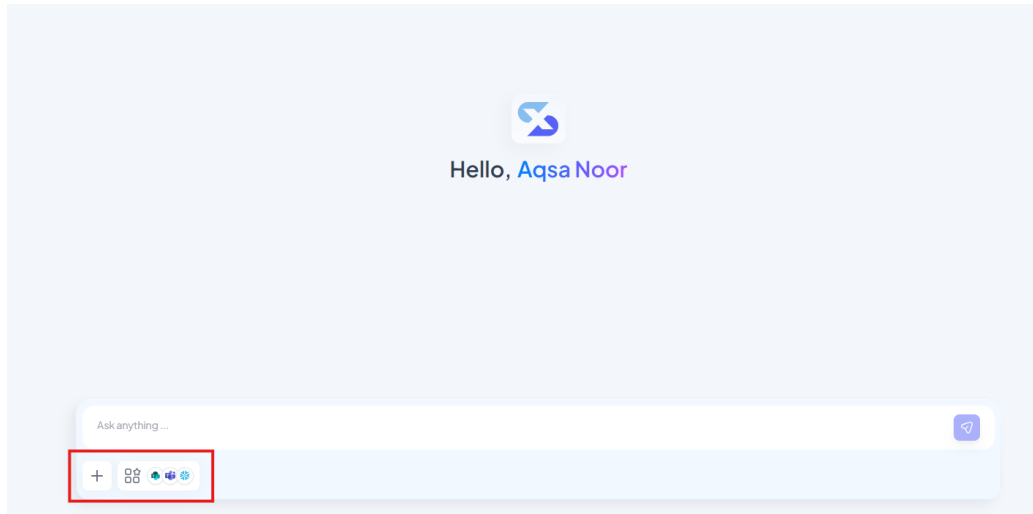
1. Click the **checkbox** next to any platform you want to connect to. You can choose multiple connections at once.



2. Click **Add** to confirm.



3. A list of data apps will be added to search.



## Connections

Connections allow Synoptix AI to securely access external platforms, so users can **search, read, and retrieve data** from connected sources.

Connections are integrations with external platforms such as collaboration tools, databases, analytics services, and storage systems. Once authenticated, these platforms become available for:

- Search and data retrieval
- Use across agents, workflows, and search

## Getting Started with Authentication

If you are new to the application, **authentication is required before a connection can be enabled or used.**

## Accessing the Connections Page

You can reach the Connections page in either of the following ways:

1. Open the **Connections** tab from the left sidebar
2. Click on any **Connection** from connection tab of Search to view all available data sources

The Connections page displays all supported platforms, along with category filters and a search bar.

## **Add and Authenticate a Connection**

Follow the steps below to add your first connection.

### **Step 1: Select a Data Source**

- Click on any data source from the **All Connectors** list
- A new connection screen will open for the selected data source

### **Step 2: Choose an Authentication Method**

Depending on the platform, one or more authentication options may be available:

#### **Option 1: OAuth Authentication**

- Secure authorization flow
- Requires **Client ID** and **Client Secret**
- Recommended for enterprise and Microsoft-based services

#### **Option 2: API Key Authentication**

- Manual token-based authentication
- Requires a valid **API Key** generated from the data source

#### **Option 3: Custom Authentication**

- Used for advanced or restricted configurations

### **Step 3: Provide Credentials**

Depending on the selected method:

- **OAuth**
  - Enter *Client ID*
  - Enter *Client Secret*

- Click **Confirm** or **Give Permission**
- **API Key**
  - Paste the API Key
  - Click **Confirm**

#### **Step 4: Confirm Connection**

Once authentication is successful:

- The data source is securely connected
- The connection appears under **My Connections**
- No further setup is required

#### **Enabling Connections for Use**

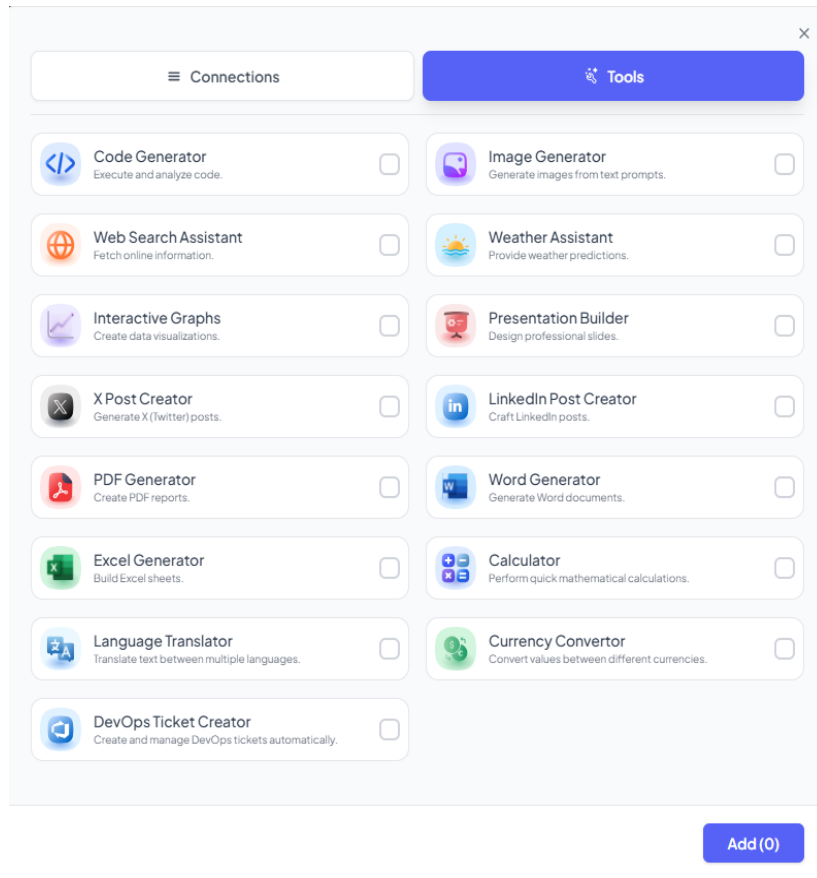
Authenticated connections can now be enabled and used in:

- **Search**
- **Agent Library**
- **My Agents**
- **Workflows**

You can select one or multiple authenticated connections and enable them as needed.

#### **Tools**

These tools can be activated to extend what the AI assistant can do.

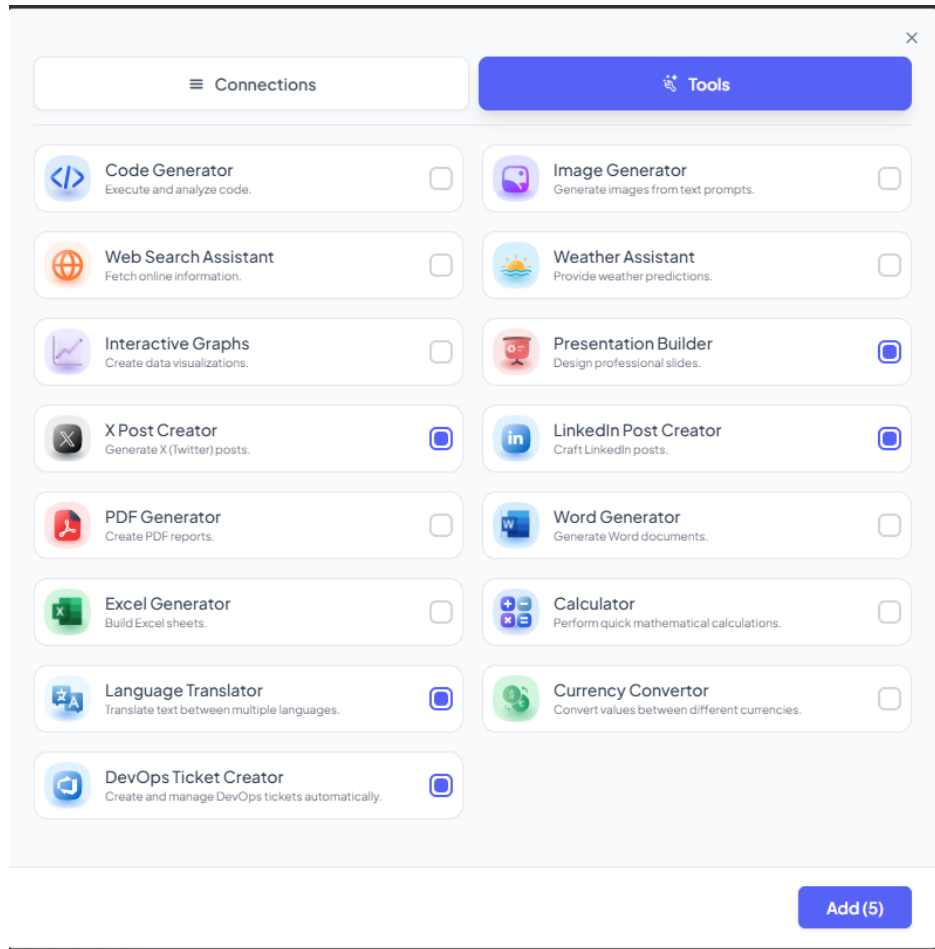


## Available Tools:

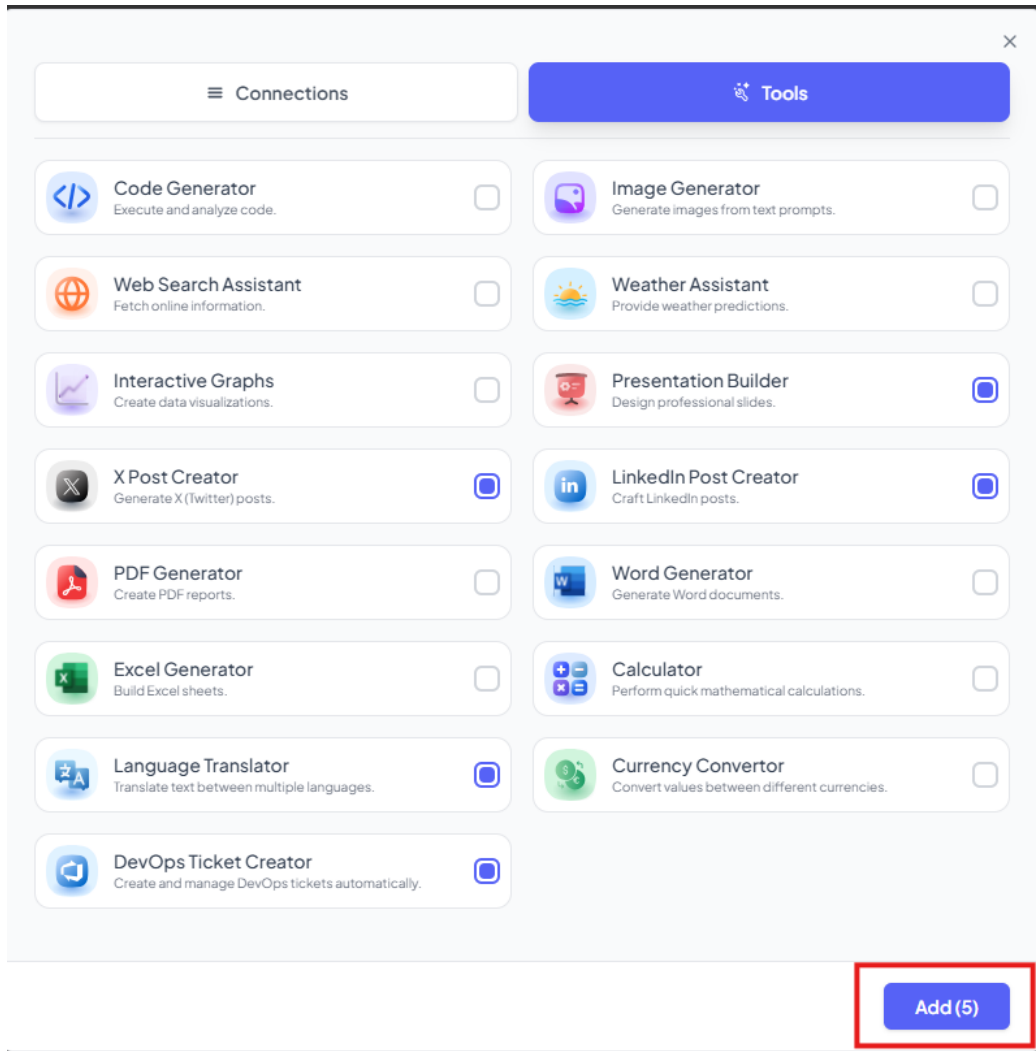
- **Web Search Assistant:** Search latest content from internet.
- **Presentation Builder:** Generate and download slide decks.
- **Interactive Graphs:** Get insights, data visualisations, and trend analysis.
- **Image Generator:** Create images, workflow diagrams, or process maps.
- **Currency Converter:** Convert currency in real time.
- **Weather Forecast:** Get weather updates for any specific location.
- **Language Translator:** Translate text to different languages.
- **Python Code Executor:** Run, execute, and debug Python code.
- **Calculator:** Perform quick calculations.
- **LinkedIn Post Creator:** Draft and post content on LinkedIn.
- **X (Twitter) Post Creator:** Draft and post content on X.

## How to enable a tool:

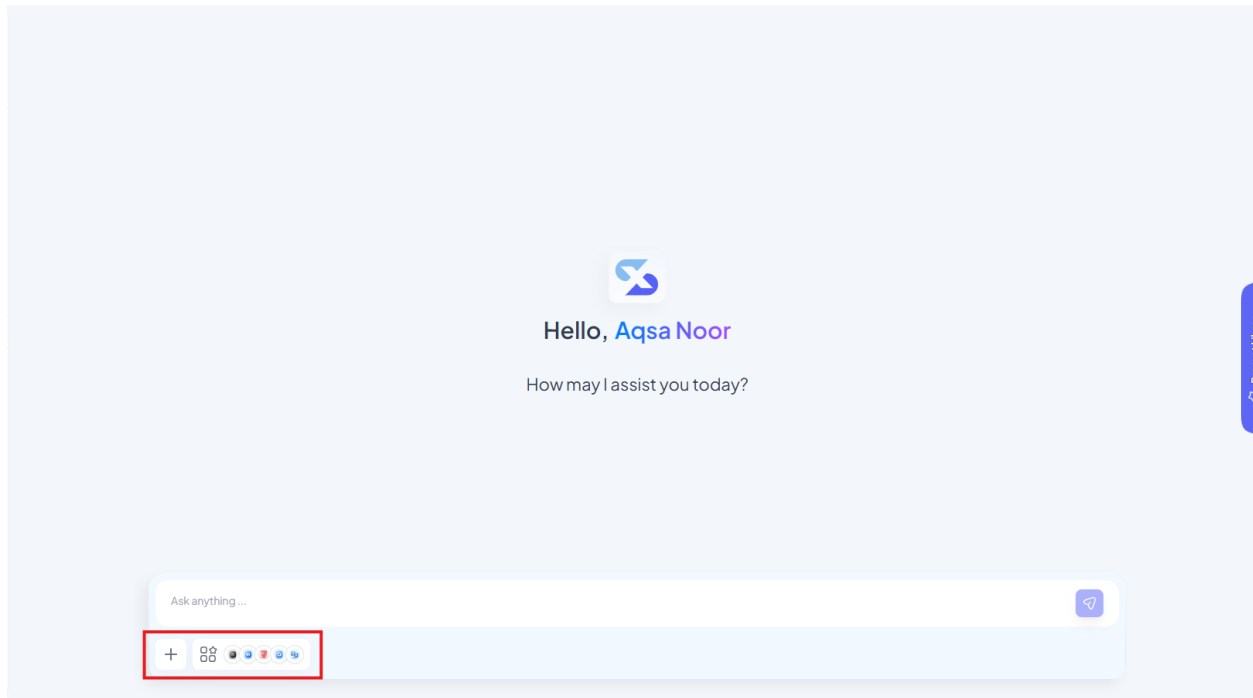
1. Click the **checkbox** next to the tool you want to add. You can activate multiple tools at once.



2. Click **Add** to enable them.



3. A list of selected tools will be added to search.



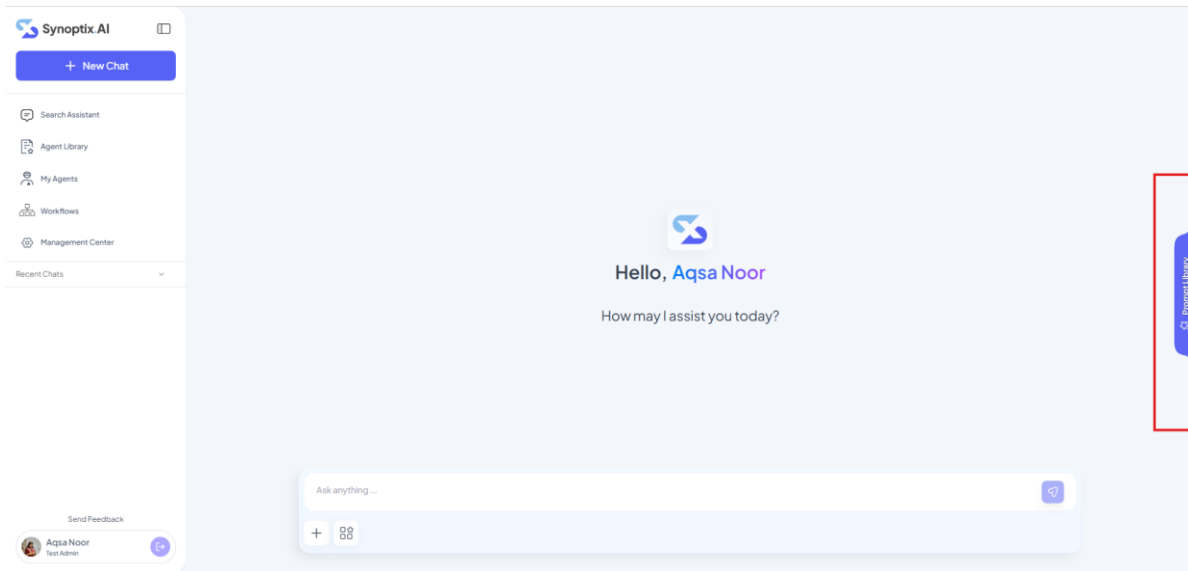
## Prompt Library

The Prompt Library helps you browse and use ready-made user prompts for different teams (Marketing, HR, Legal, IT, Finance, Sales, etc.). You can also build your own custom prompts.

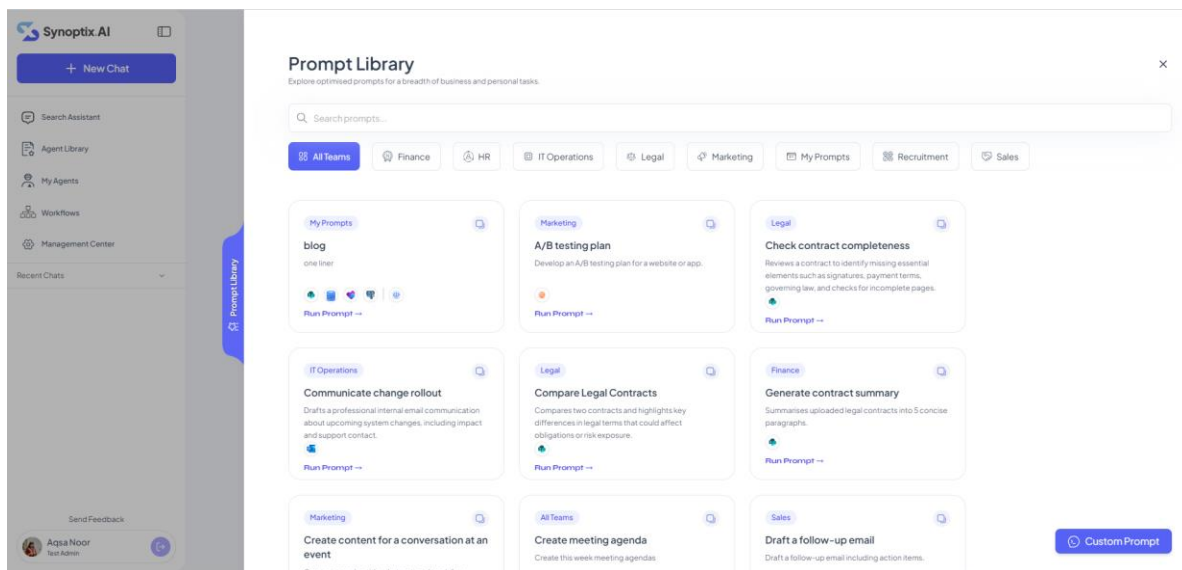
### Open Prompt Library

From any chat screen:

1. Look at the right side of your screen.



2. Click **Prompt Library** (the floating tab). The Prompt Library window will slide open.

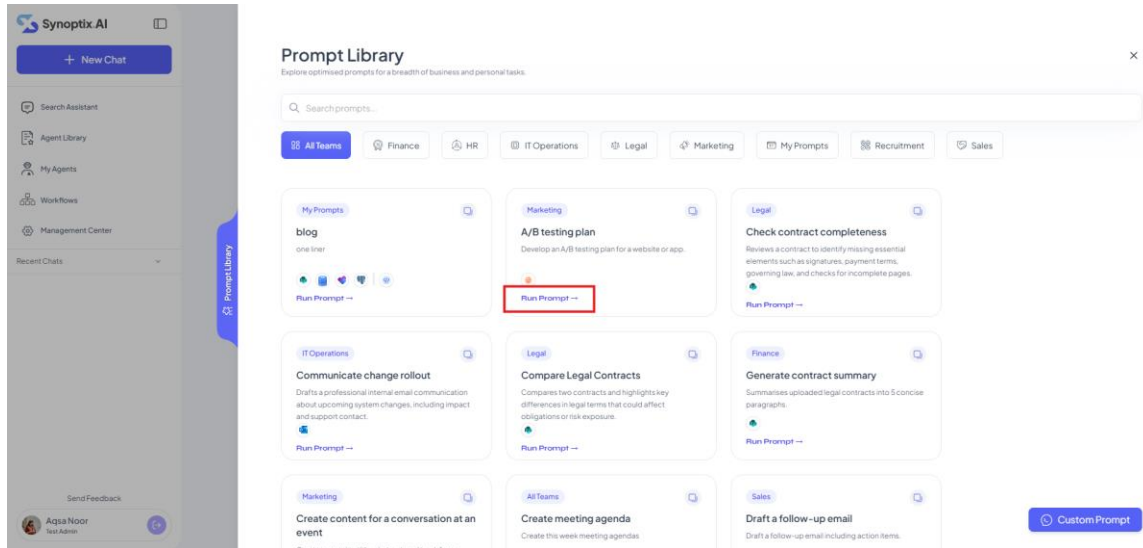


## Browse and Use Ready-Made User Prompts

1. Use the top search bar to find a prompt (example: “contract,” “email,” “agenda”).
2. Filter by category:
  - a. All Teams
  - b. Finance
  - c. HR and Recruitment
  - d. IT Operations
  - e. Legal
  - f. Marketing

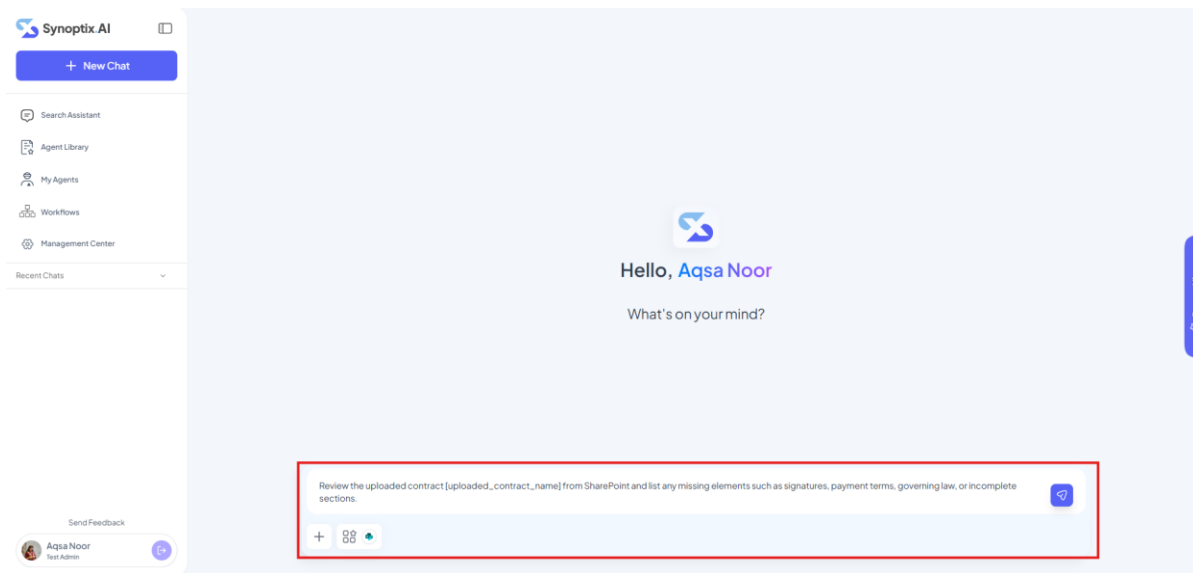
- g. Sales and
- h. General

3. Click Run Prompt to use the prompt.



4. The prompt loads into the chat box, ready to execute.

Note: Replace the placeholder with the relevant contract name or terms, then click Run to execute.

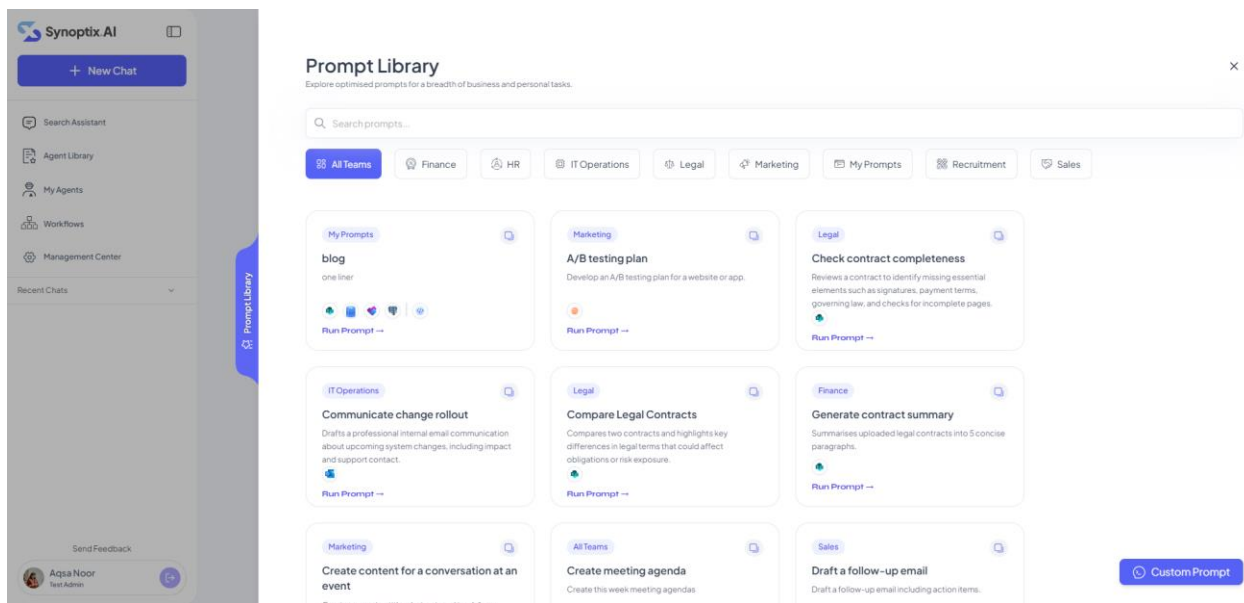


## Create Your Own Custom Prompt (Step-by-Step)

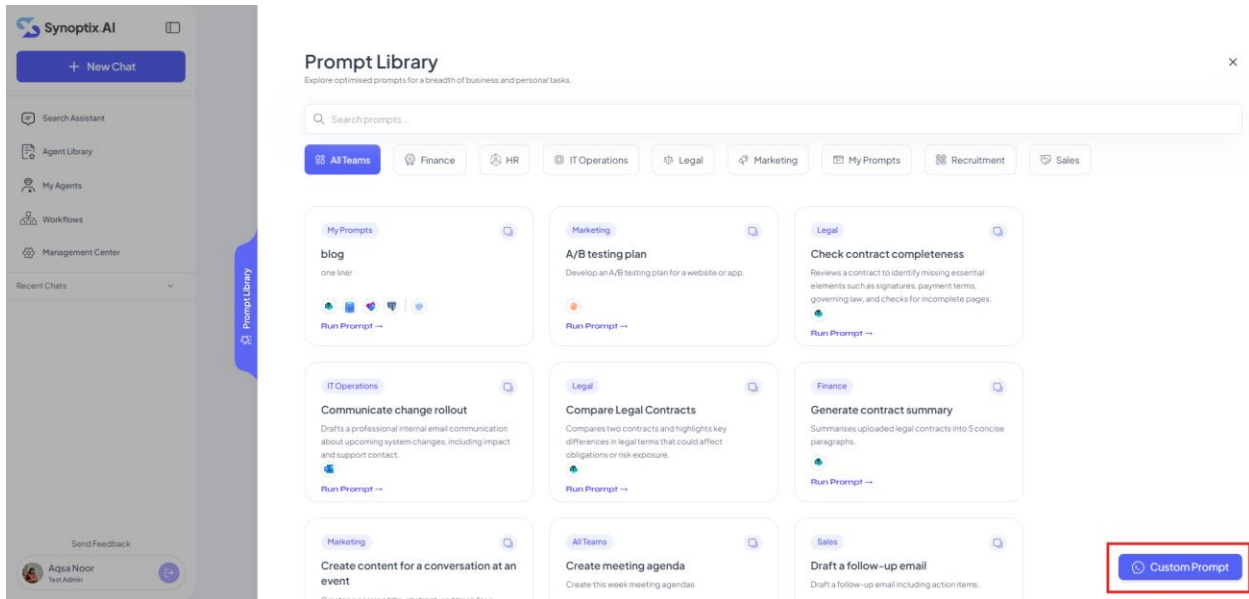
**Custom prompts allow you to create reusable prompts tailored to your specific use cases.** You can define the prompt logic once, then add the required data sources and tools based on your needs.

All custom prompts are saved in the **Prompt Library** under **My Prompts**, where they can be easily accessed, reused, and managed.

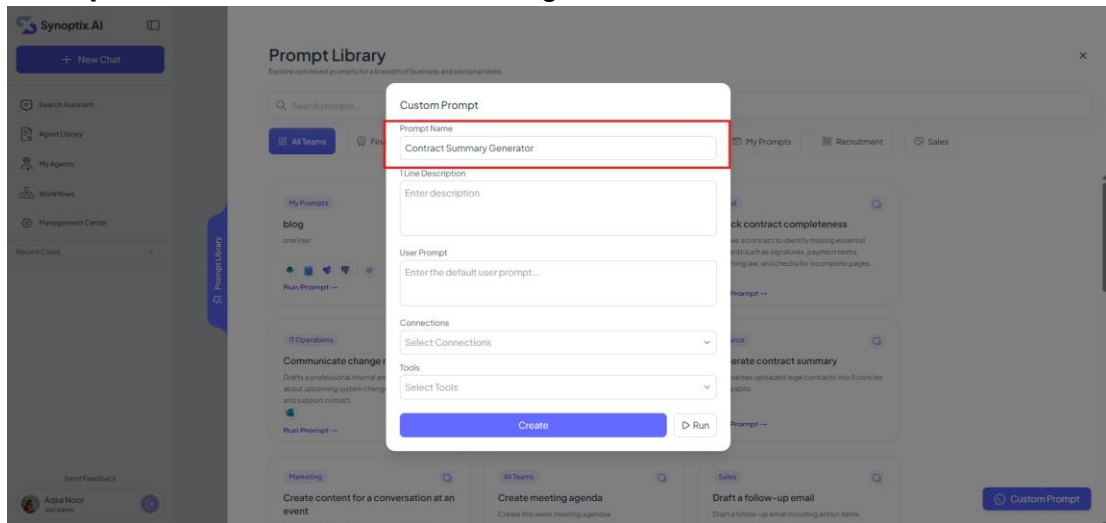
1. Open the **Prompt Library** from the right side of the screen.



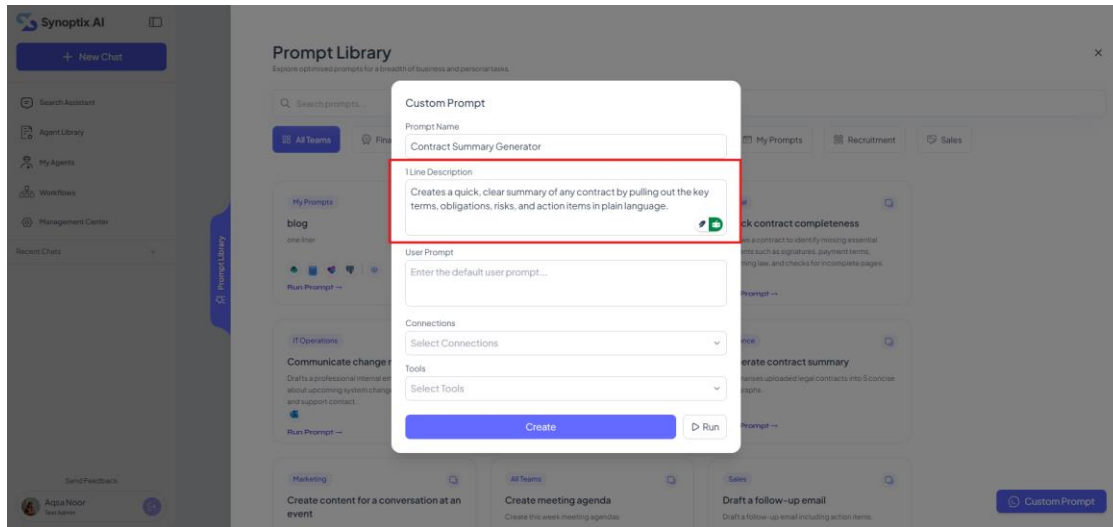
2. Click the **Custom Prompt** button in the bottom right corner.



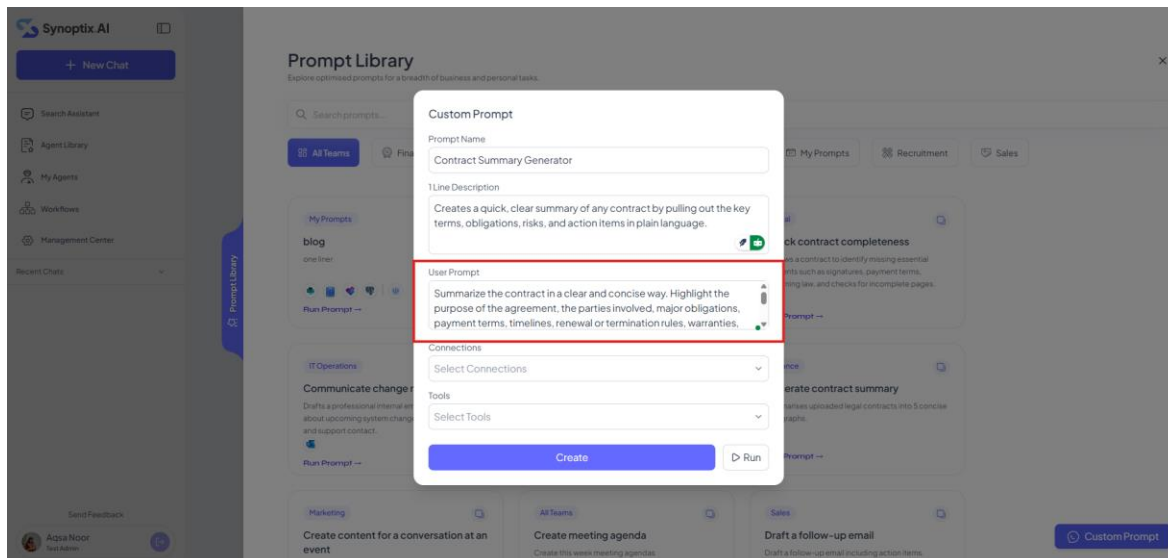
3. A form will appear. Fill in the following fields:
  - a. **Prompt Name:** Enter a short, meaningful title.



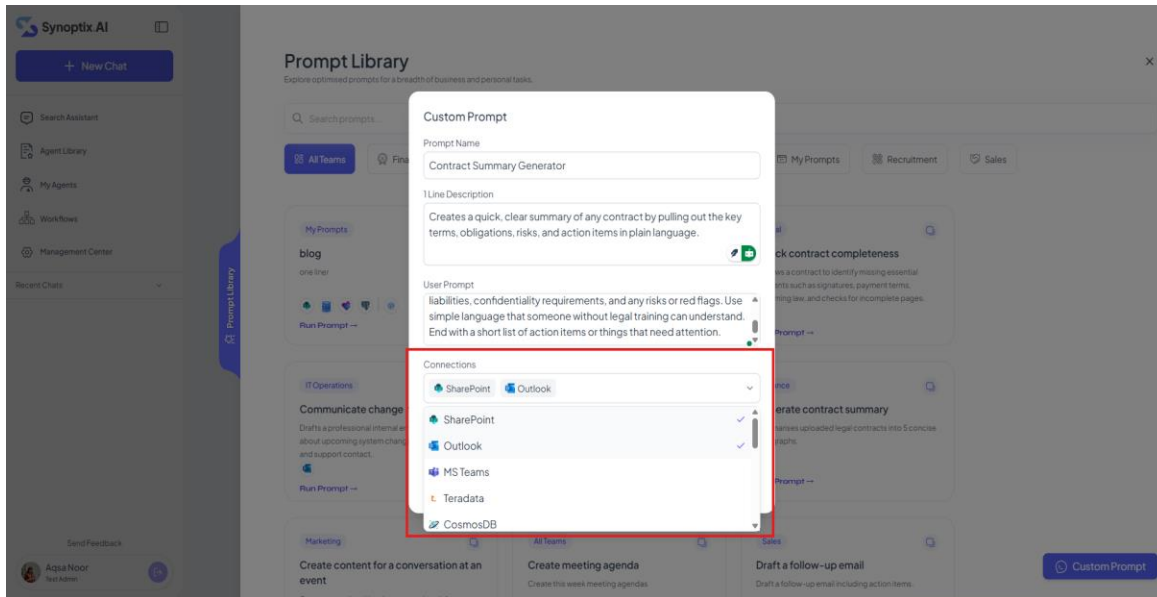
- b. **1-Line Description:** Briefly describe what this prompt does.



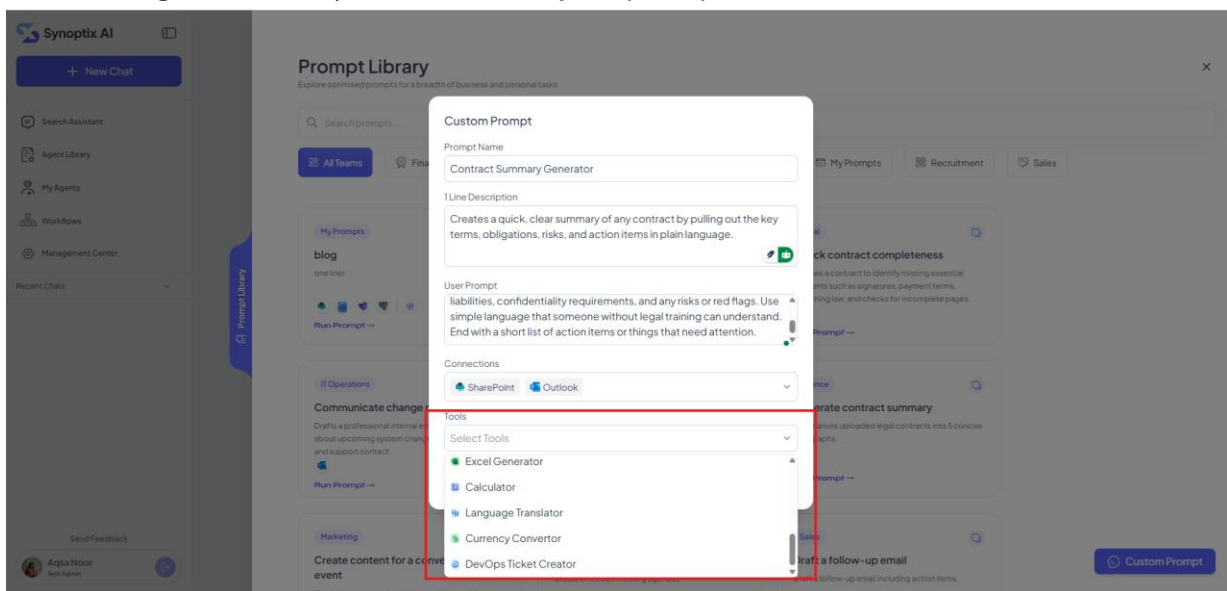
c. **User Prompt:** Write your prompt based on your specific use case.



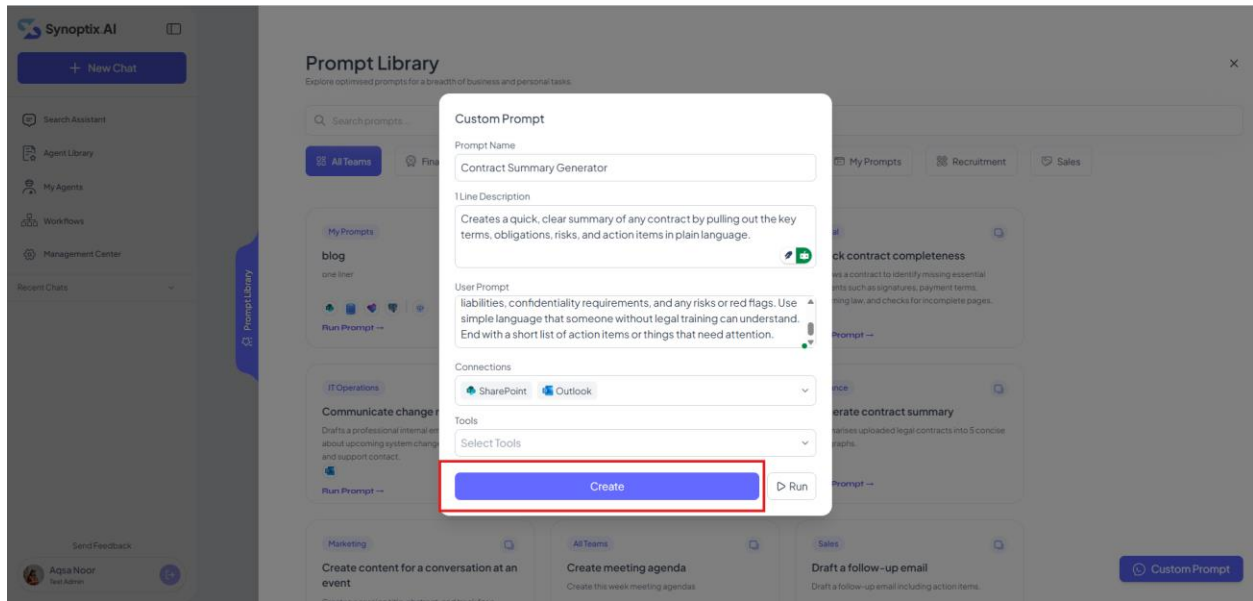
d. **Connections:** If your prompt requires external data, choose the appropriate data source (*SharePoint, Outlook, etc.*) before running it.



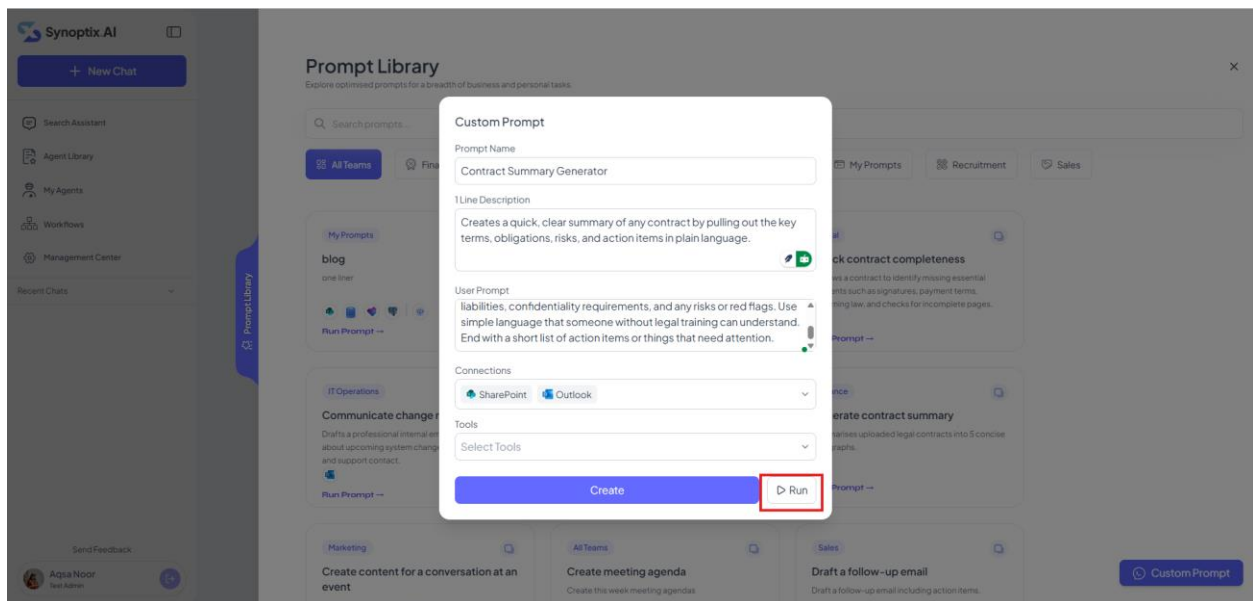
e. **Tools (Optional):** Select the appropriate tools (for example, Web Search or Image Generator) based on what your prompt needs to do.



4. When you're finished, choose one of the following options:
  - a. **Create:** Save the prompt to your Prompt Library.

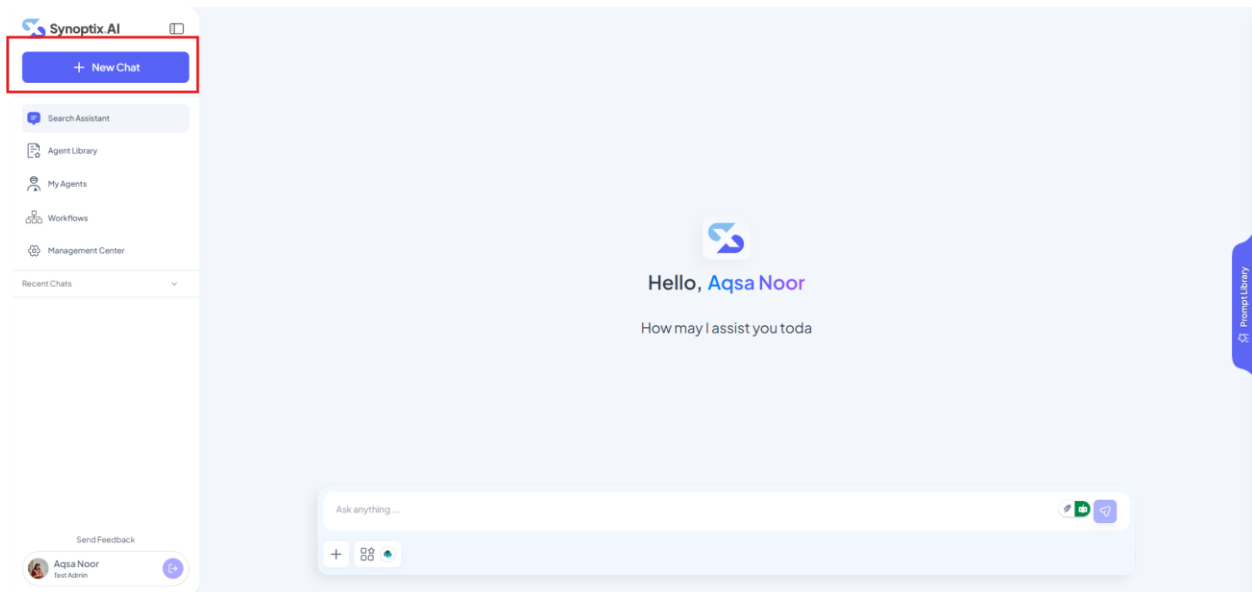


- b. **Run:** Execute the prompt immediately without saving it to the Prompt Library.



## New Chat

Starts a new session. Each chat stays saved in Recent Chats.

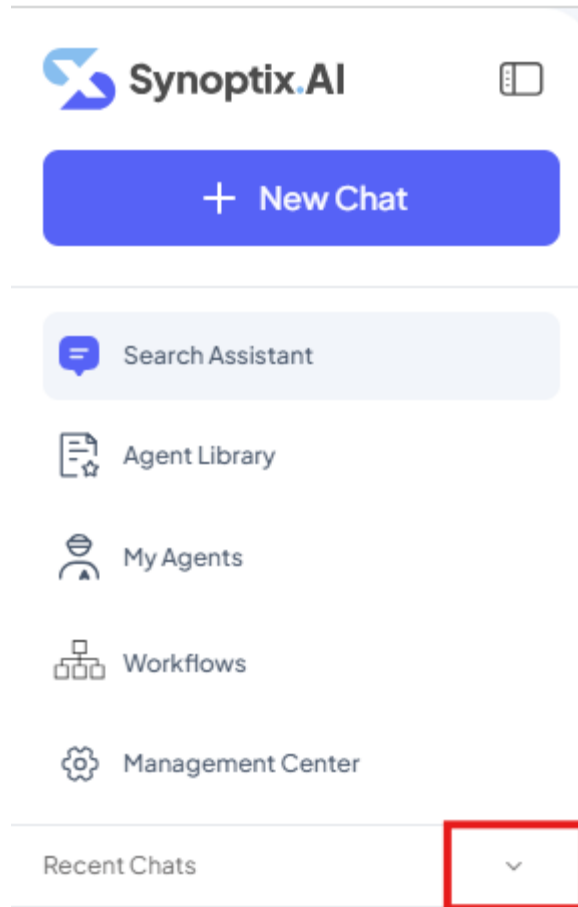


## Recent Chats

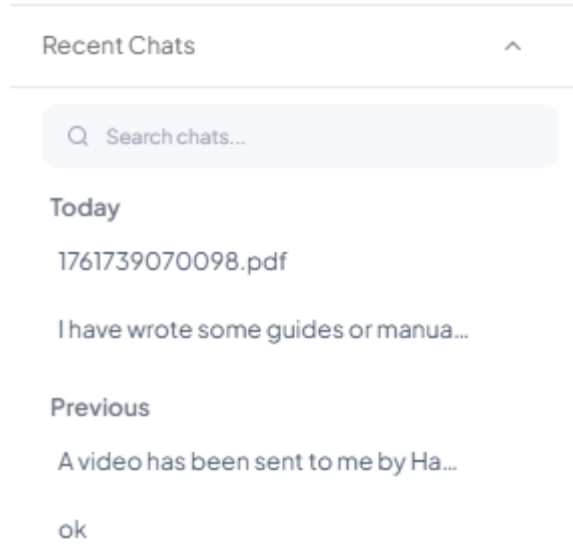
The Recent Chats section lets you view, search, rename, or delete your previous conversations.

### How to Open Recent Chats

1. On the left sidebar, click the dropdown option.

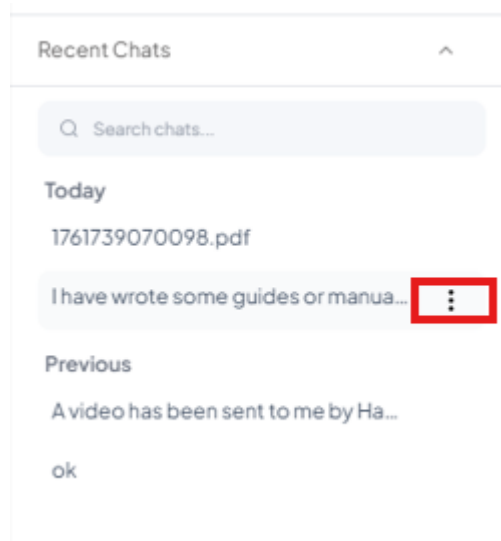


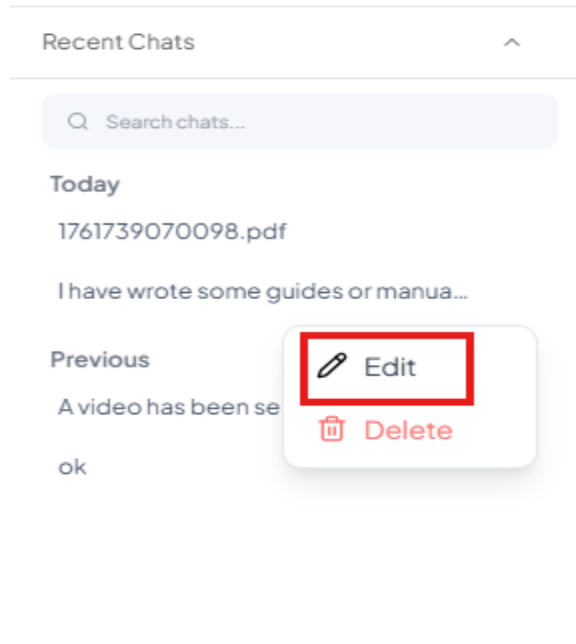
2. A list of your past chats will appear.



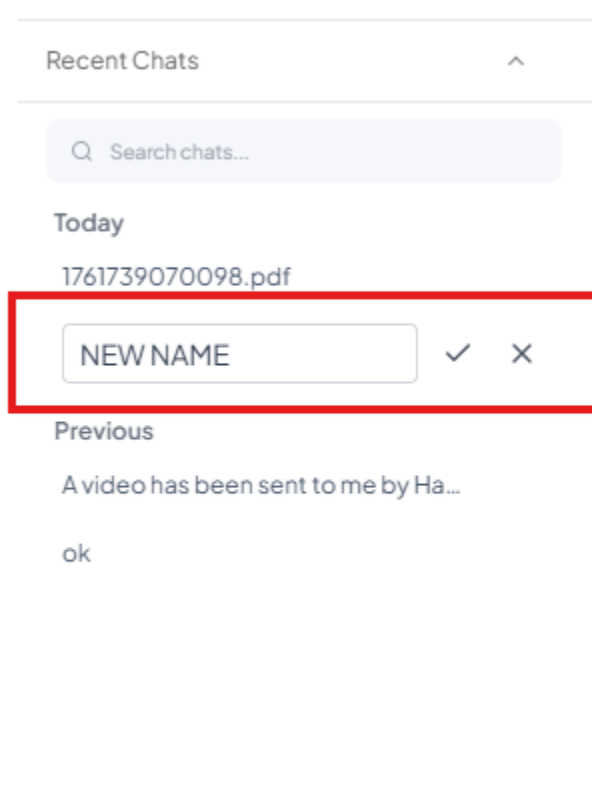
## Rename (Edit) a Chat

1. Hover over the chat you want to rename. Click More (:) and then select **Edit**.



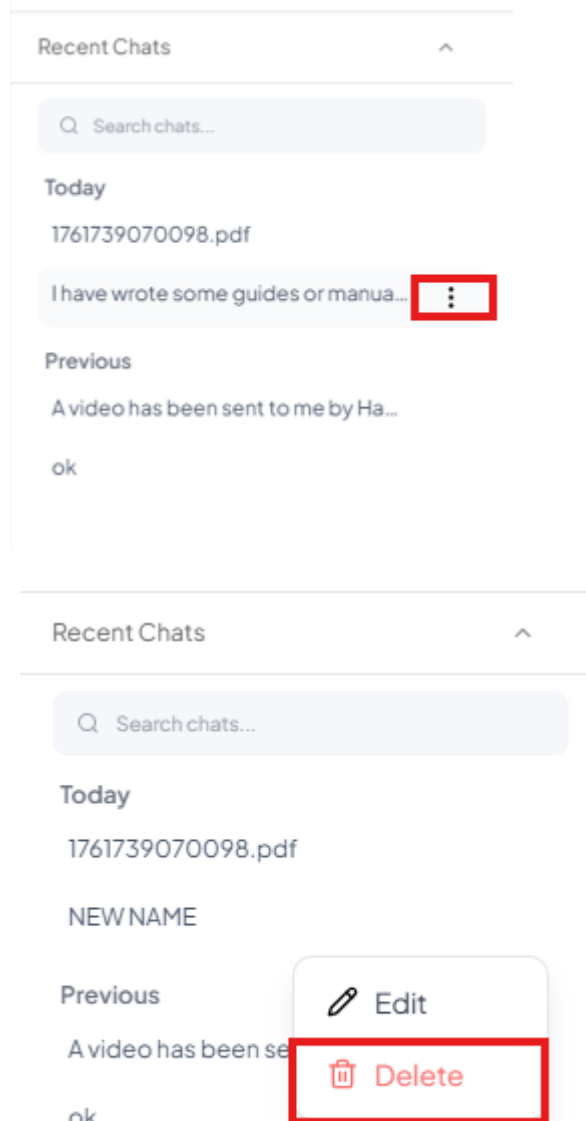


2. Type the new name and press **Enter**. This will update the chat title instantly.

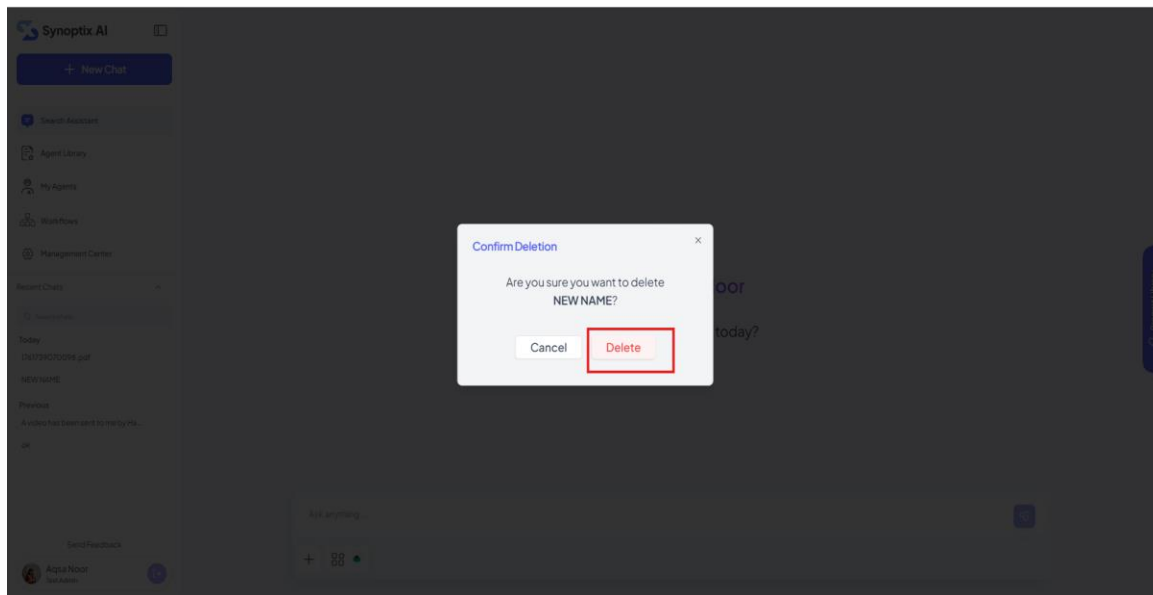
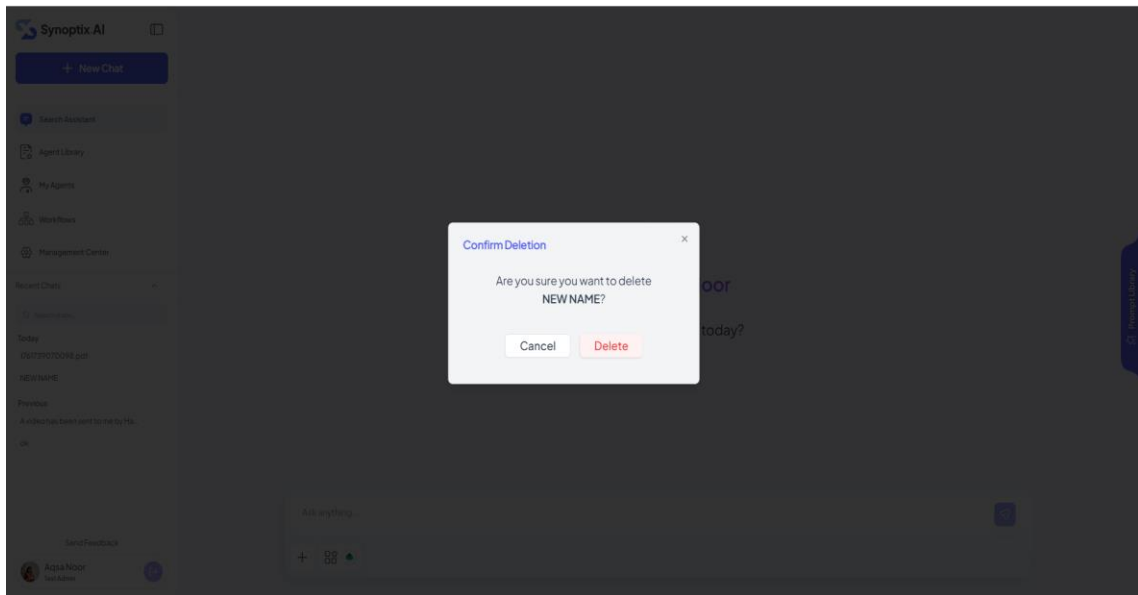


## Delete a Chat

1. Hover over the chat you want to delete. Click More (:) and then select Delete.



2. A confirmation message will appear. Click **Delete** to remove the chat permanently.

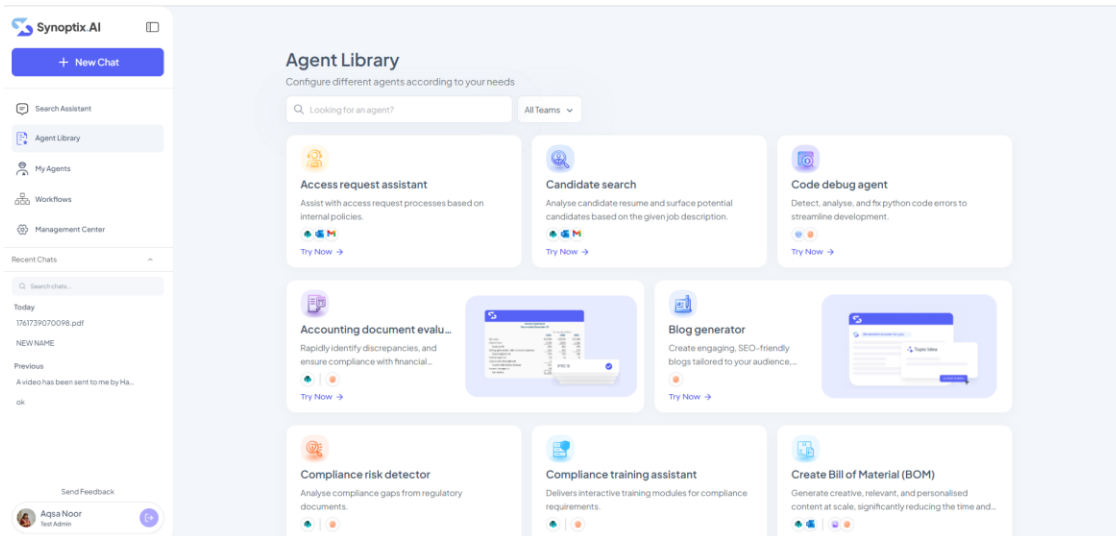


## Agent Library

The Agent Library provides a collection of pre-configured AI agents that you can test and deploy for future use. Each agent is designed for a specific business task, such as content generation, contract summarisation, reporting, finance assistance, HR help desk, and more.

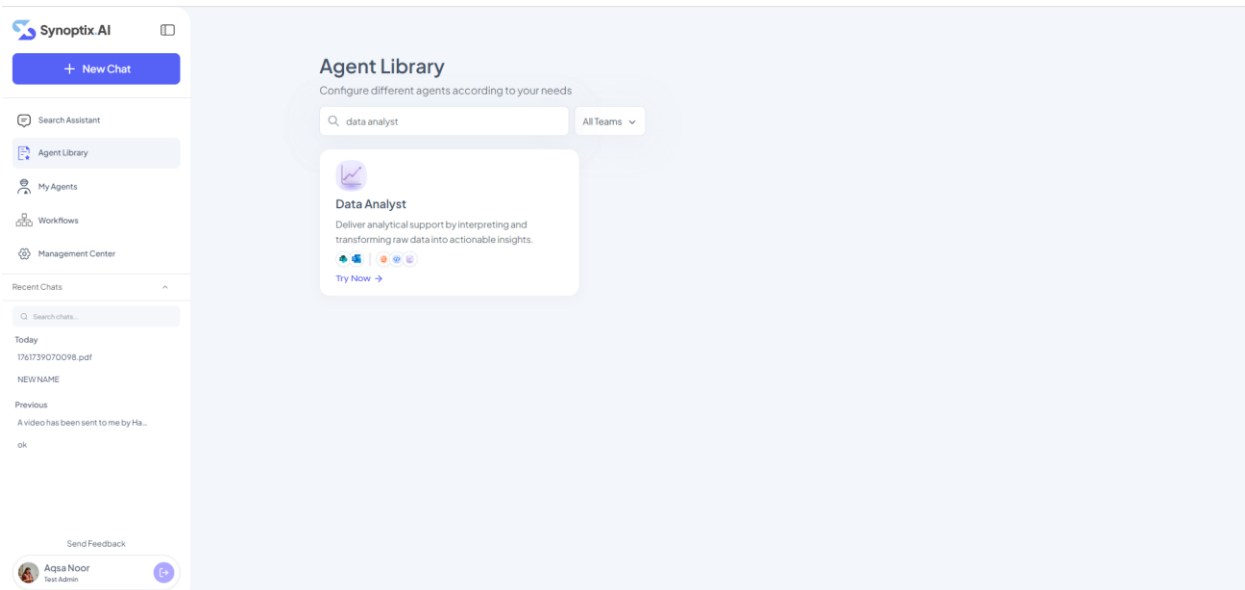
### Review Agent Library

1. Find and select the Agent Library from the left sidebar. A number of available agents will appear.



## Search or filter an Agent

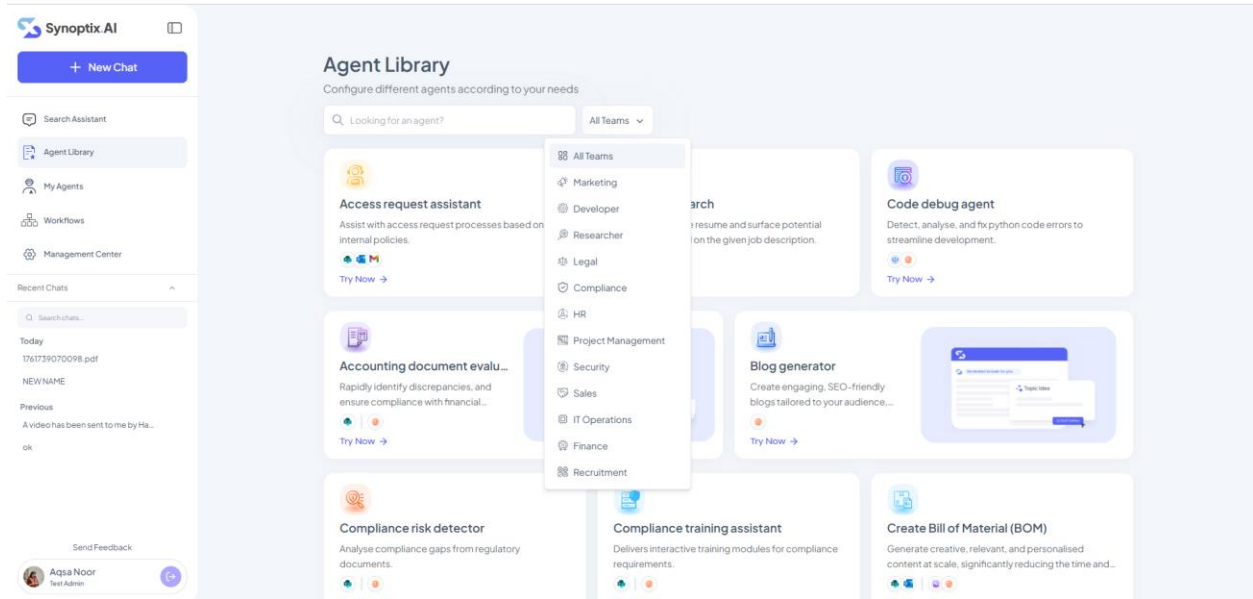
1. Search: Type the agent's name or keyword in the search bar (e.g., *blog, data analyst, contract*).



2. Filter: Click the **All-Teams** dropdown and select a category such as
  - i. Marketing
  - ii. Developer
  - iii. Legal
  - iv. HR
  - v. Finance
  - vi. Project Management

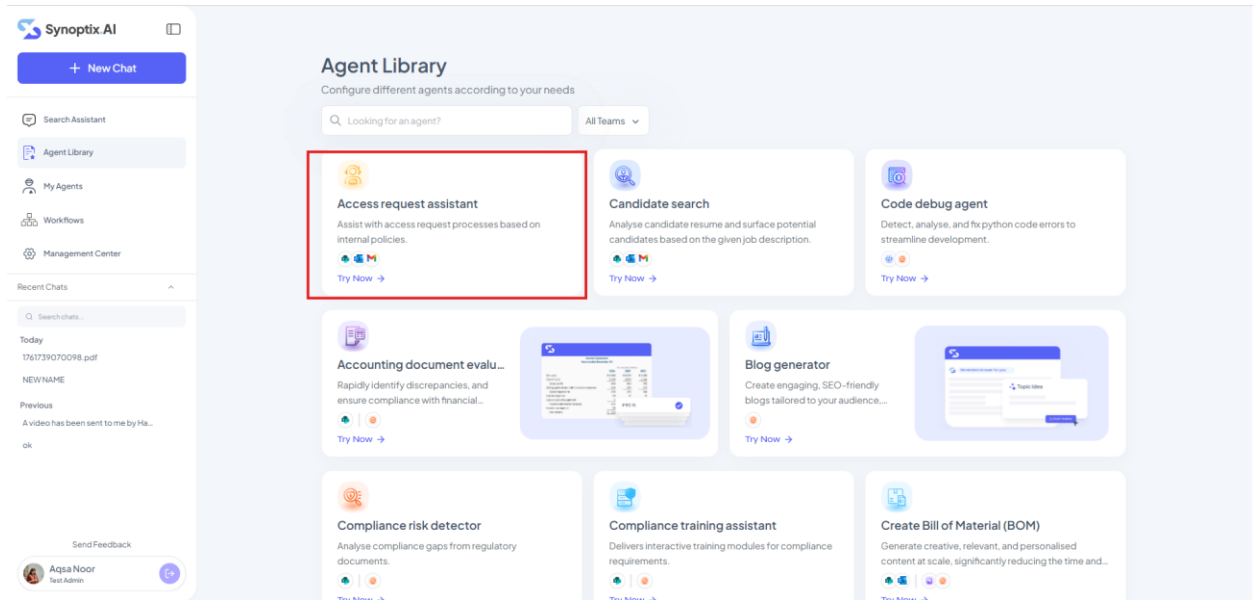
vii. Recruitment, etc.

The list will update according to your selection.

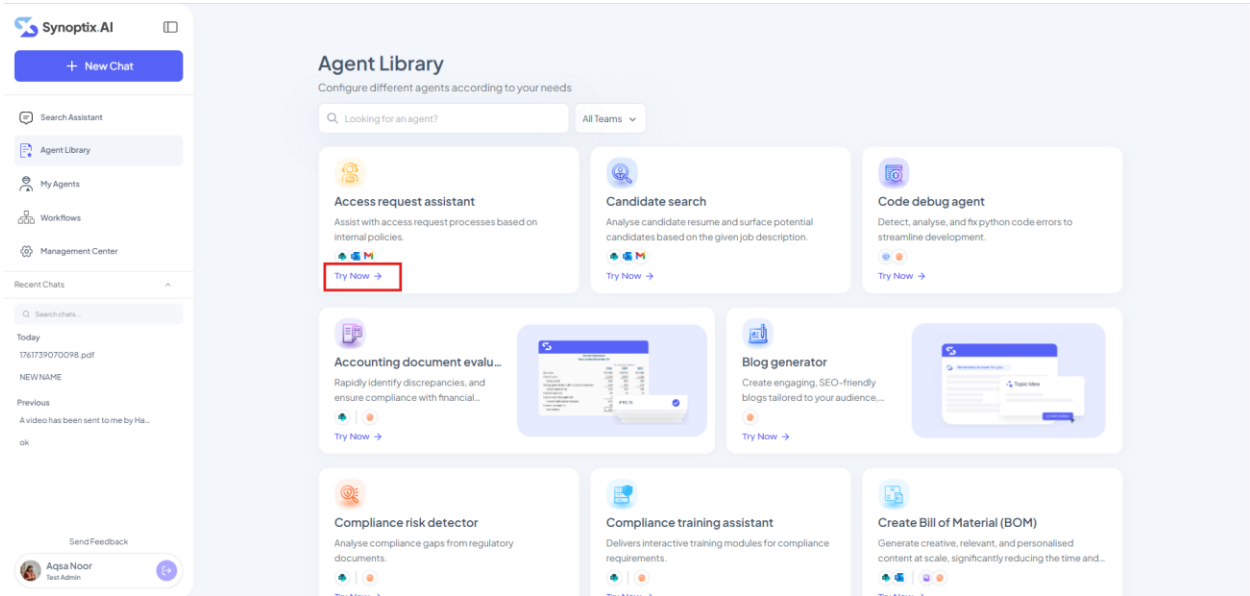


## Agent card

Each agent card provides an overview of an agent, including its title, description, connected tools and data sources, and the category under which it is organized.

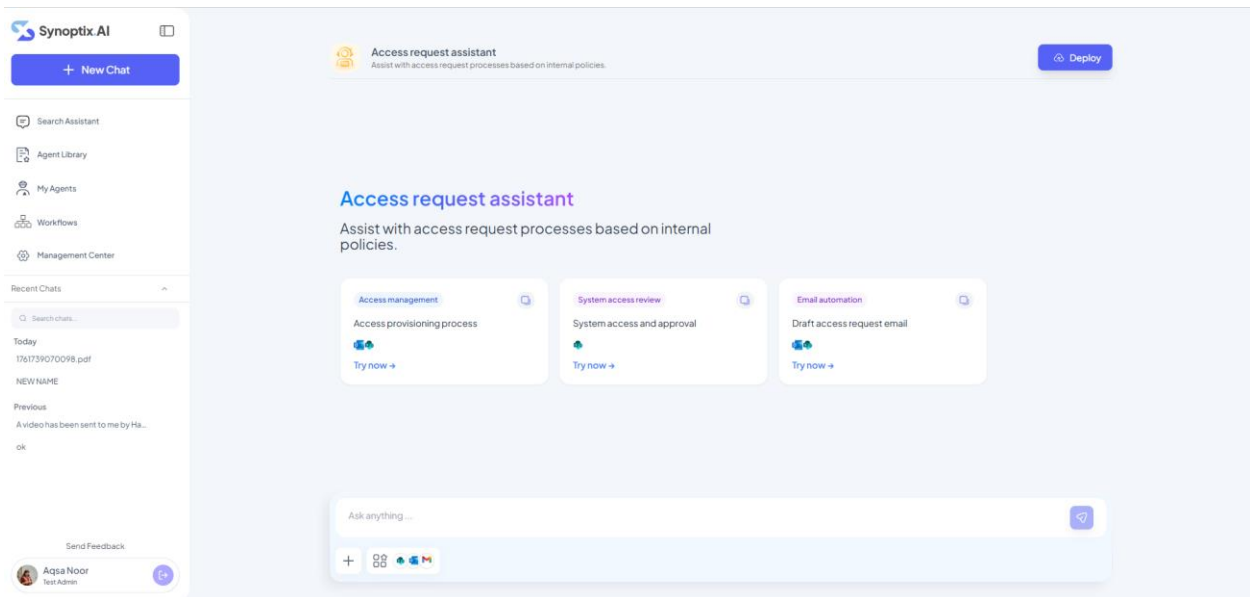


1. Test agent in Playground: To test and run an agent in playground, click try now.



2. The agent’s playground is a chat window where you can interact with the agent. Here, you can:

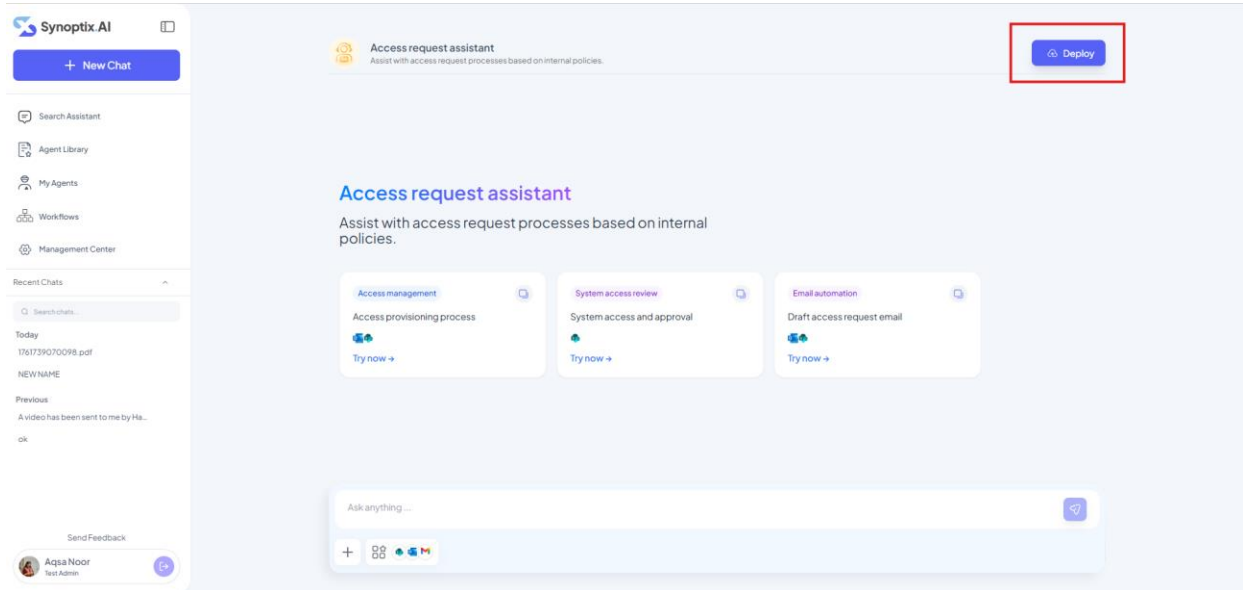
- Use pre-configured three prompts.  
Note: These prompts are provided as examples to guide users on how to interact with the agent and what types of questions or tasks it can handle.
- Ask questions directly in playground (e.g., “evaluate finance or cash flow documents”)
- Upload and query documents (if the agent supports document inputs)



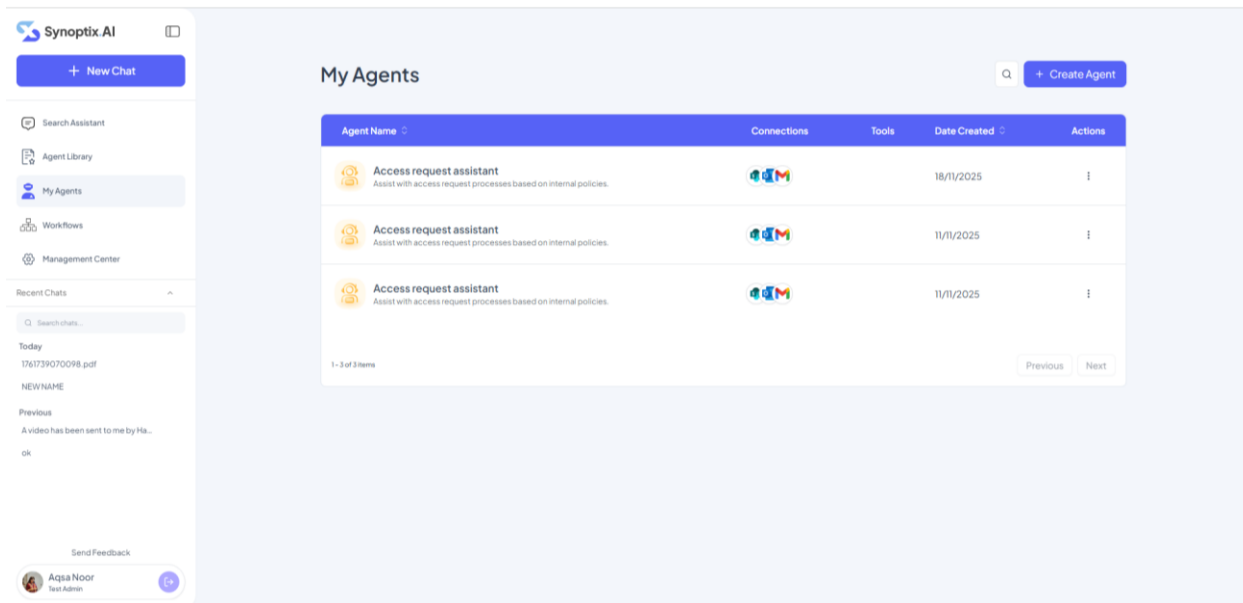
# Deploy an Agent

If you decide to use an agent in your workspace:

1. Click the deploy button on the top-right corner of the agent screen.
2. A confirmation message of agent deployment will appear.



3. You can access the deployed agent in My Agents section and is ready for future use.



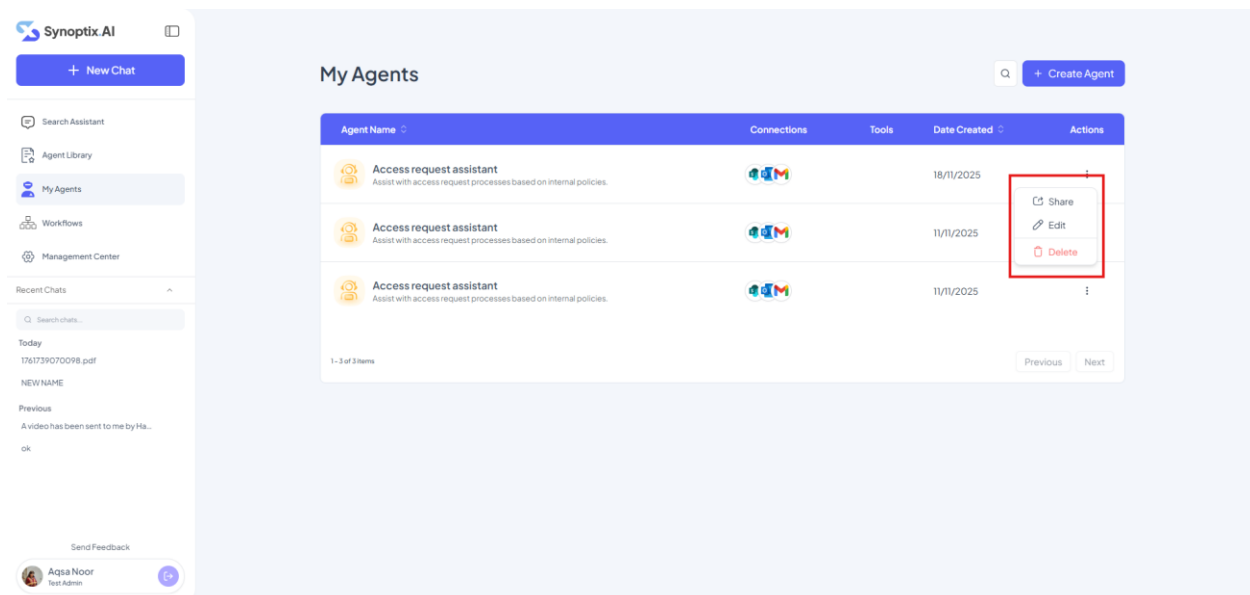
## My Agents

**My Agents** display a list of deployed AI agents, including agents from the **Agent Library** as well as any **custom agents** you have created.

Select **My Agents** tab from the left sidebar. If no agents have been deployed yet, the list will be empty.

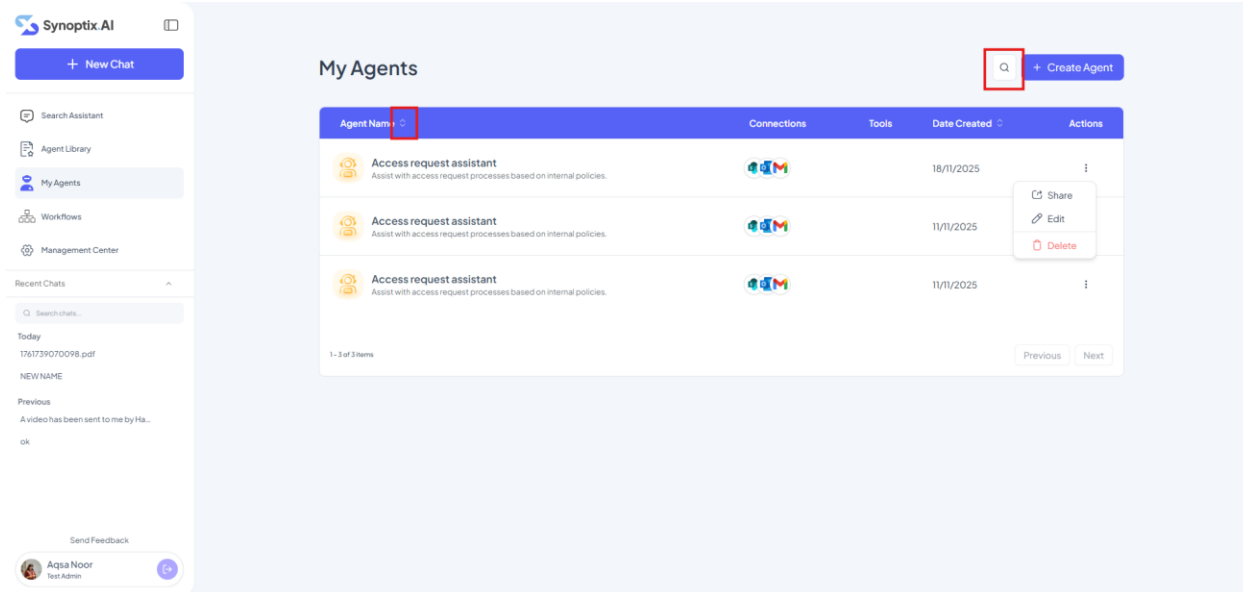
Here, you can:

- Share the deployed agent with your teammates
- Edit agent configuration (Agent name, description, instruction, connections, tools and LLM model)
- Delete the agent if it's no longer needed
- Search for an agent using the search bar
- Sort the list alphabetically or by recently created date to quickly locate agents.



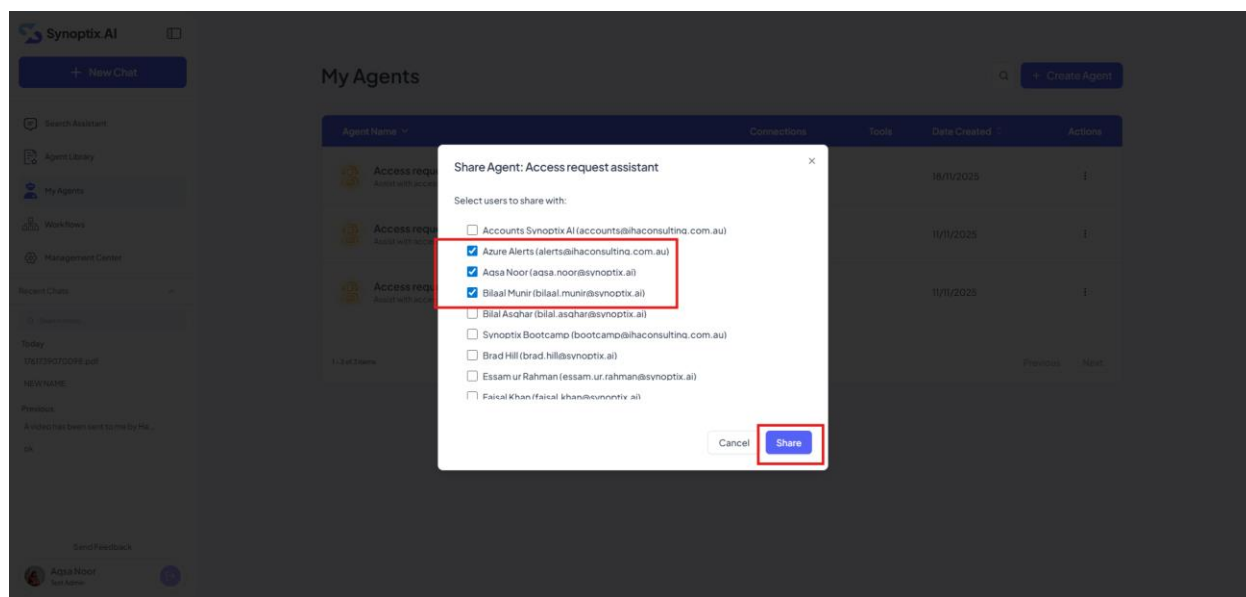
The screenshot displays the Synoptix AI interface. On the left is a sidebar with navigation options: Search Assistant, Agent Library, My Agents (selected), Workflows, and Management Center. Below this are 'Recent Chats' and a 'Send Feedback' button. The main area is titled 'My Agents' and features a search bar and a '+ Create Agent' button. A table lists three agents, all named 'Access request assistant' with the description 'Assist with access request processes based on internal policies.' The table columns are Agent Name, Connections, Tools, Date Created, and Actions. The first agent's 'Actions' menu is highlighted with a red box, showing 'Share', 'Edit', and 'Delete' options. The table also includes pagination controls at the bottom right, showing '1 - 3 of 3 items' and 'Previous' and 'Next' buttons.

Agent Name	Connections	Tools	Date Created	Actions
Access request assistant Assist with access request processes based on internal policies.	[Icons]	[Icons]	18/11/2025	Share, Edit, Delete
Access request assistant Assist with access request processes based on internal policies.	[Icons]	[Icons]	11/11/2025	[Actions]
Access request assistant Assist with access request processes based on internal policies.	[Icons]	[Icons]	11/11/2025	[Actions]



## Share an Agent

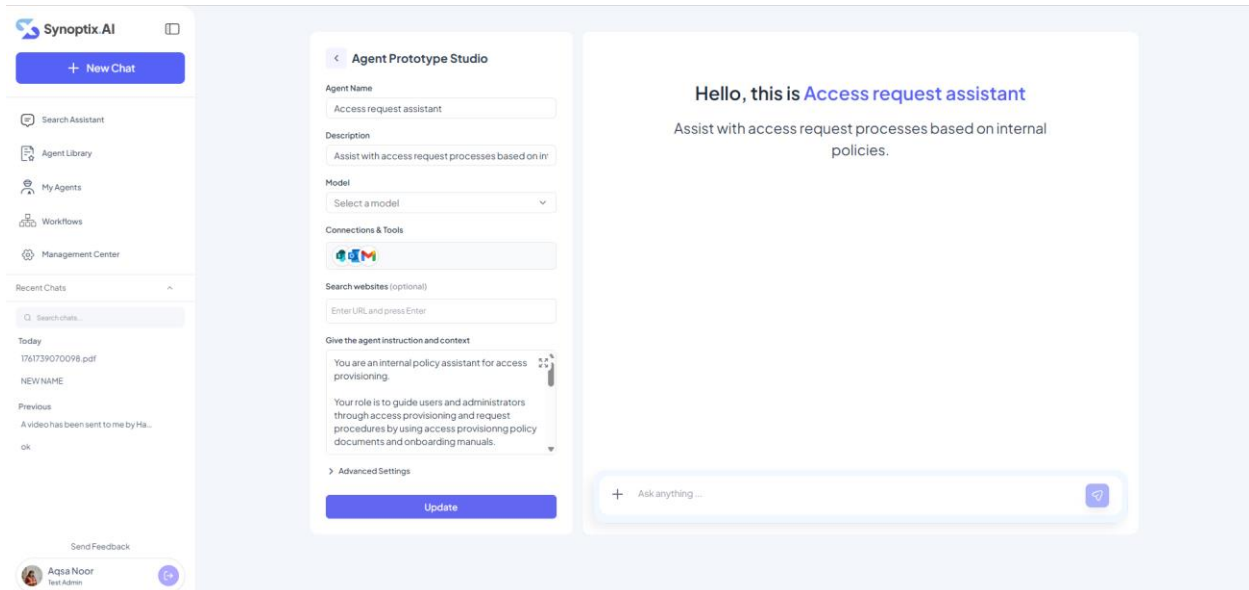
1. For any specific agent, click More (:)
- and then select Share. Invite/share with teammates to use the same agent



## Edit an Agent:

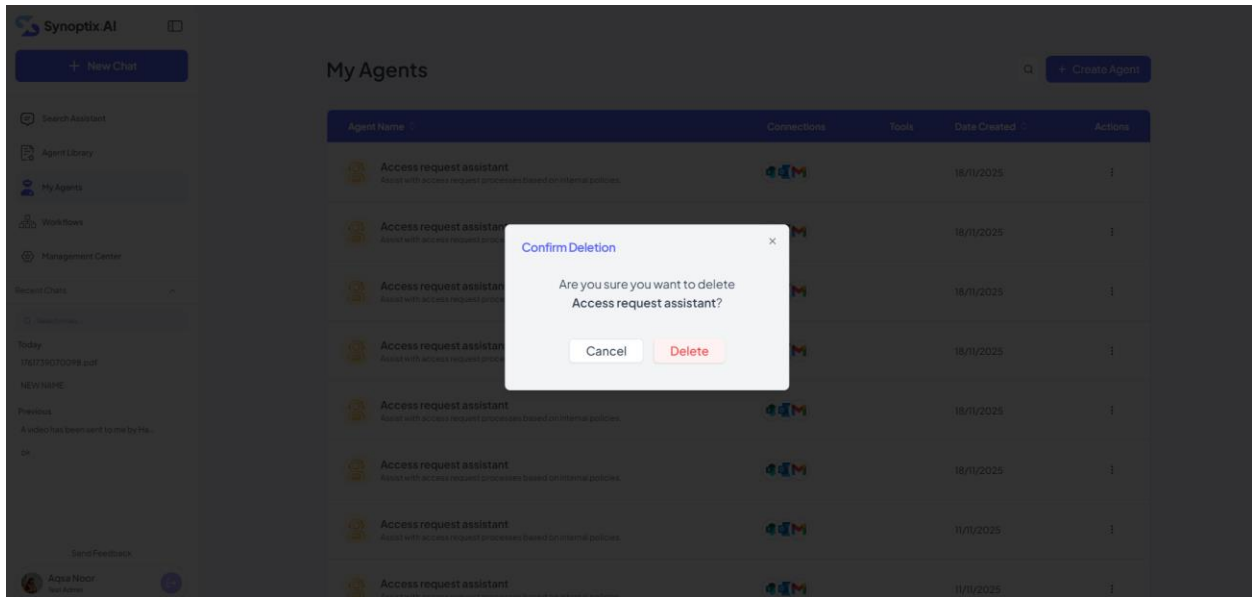
1. Editing an agent lets you to change and modify its configuration and behavior
  2. Click More (:)
- and then select Edit. The agent opens in the Agent Prototype Studio, where you can update:
- Agent Name

- Description
- Instruction window (define role and responsibilities of an agent)
- Model selection (e.g., GPT-4.1 or any available model)
- Connected data sources (SharePoint, Outlook, Gmail, etc.)
- Tools (web search, presentation builder, Python executor, etc.)
- Temperature and P-value in *Advanced Settings* (to control creativity and reasoning)



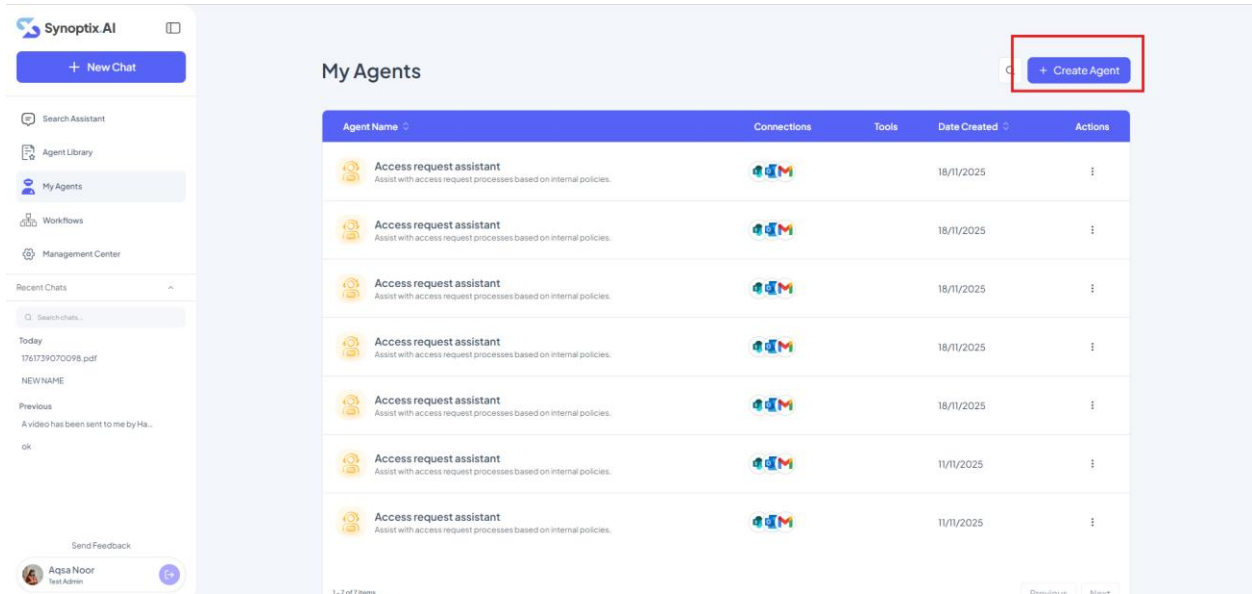
## Delete Agent

1. Click More (:)



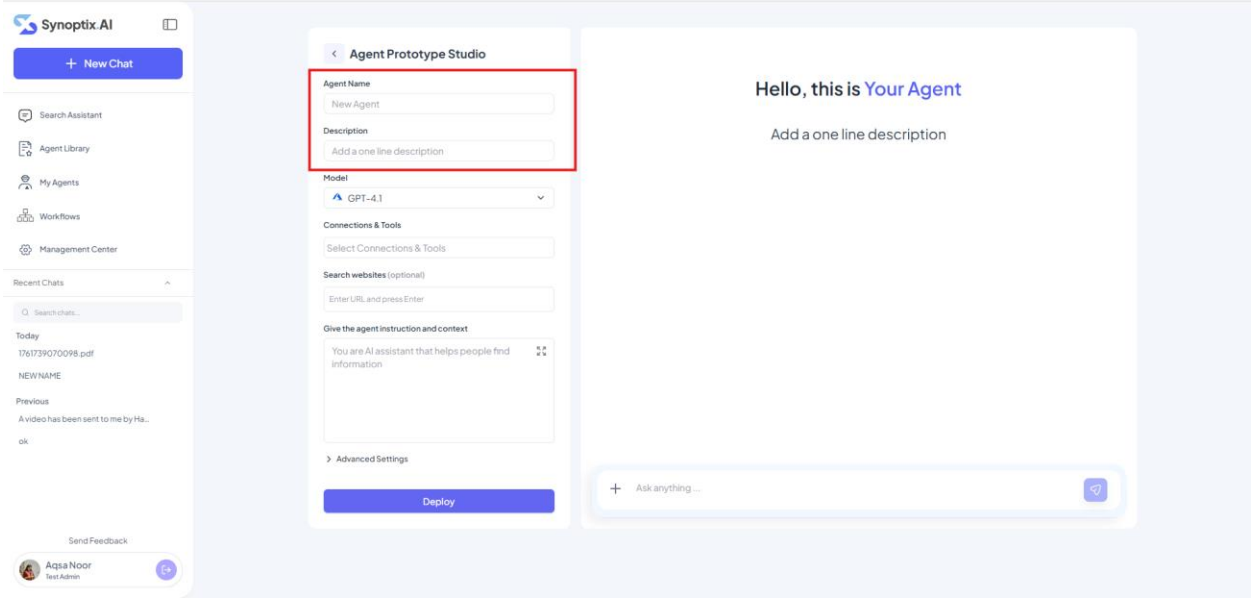
## Create a new Custom Agent

1. Go to My Agents and click Create Agent.

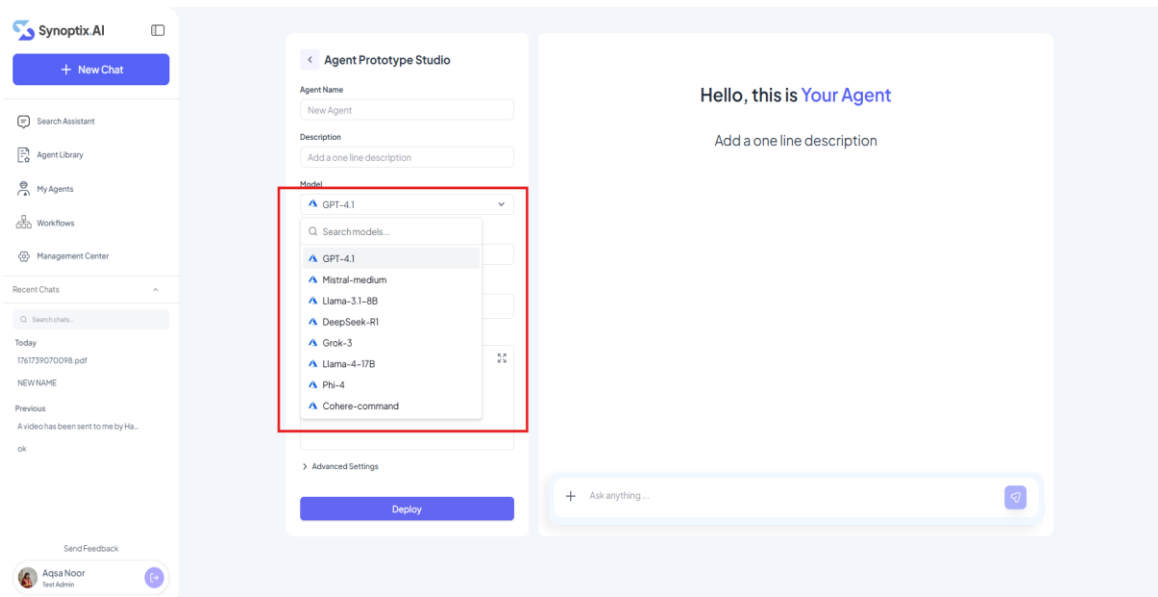


2. The agent prototype studio will open. Fill in the following fields:

- **Agent Name**
- **Description**



- **Instruction** (define the agent's role, e.g., "You are an assistant that drafts finance reports...")
- Choose the best LLM Model from dropdown



- Select **Connections** (data sources you want the agent to access).

Synoptix AI

+ New Chat

- Search Assistant
- Agent Library
- My Agents
- Workflows
- Management Center

Recent Chats

Search chats...

Today

1761729070098.pdf

NEW NAME

Previous

A video has been sent to me by Ha...  
ok

Send Feedback

Aqsa Noor  
Test Admin

### Agent Prototype Studio

Agent Name  
New Agent

Description  
Add a one line description

Model  
GPT-4.1

**Connections & Tools**  
Select Connections & Tools

Search websites (optional)  
Enter URL and press Enter

Give the agent instruction and context  
You are AI assistant that helps people find information

Advanced Settings

Deploy

## Hello, this is Your Agent

Add a one line description

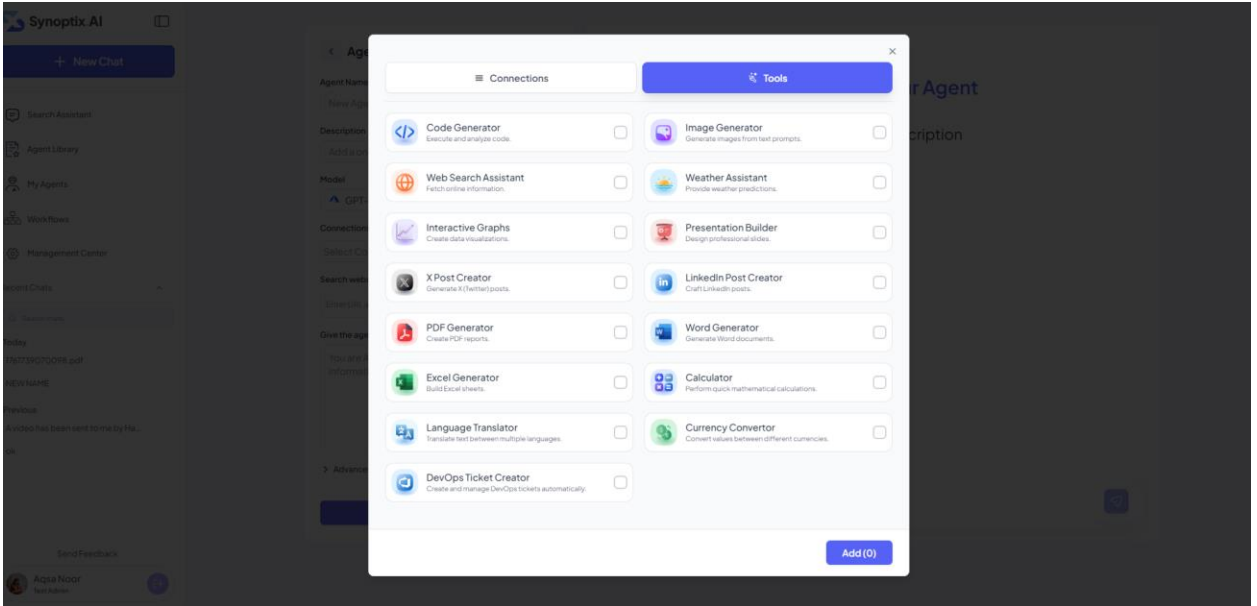
+ Ask anything...

The screenshot shows a user interface with two main sections: 'Connections' and 'Tools'. The 'Connections' section is highlighted in blue and contains a list of 16 services, each with an icon, a name, a brief description, and a checkbox. The 'Tools' section is currently empty, with a blue button labeled 'Add (0)' at the bottom right.

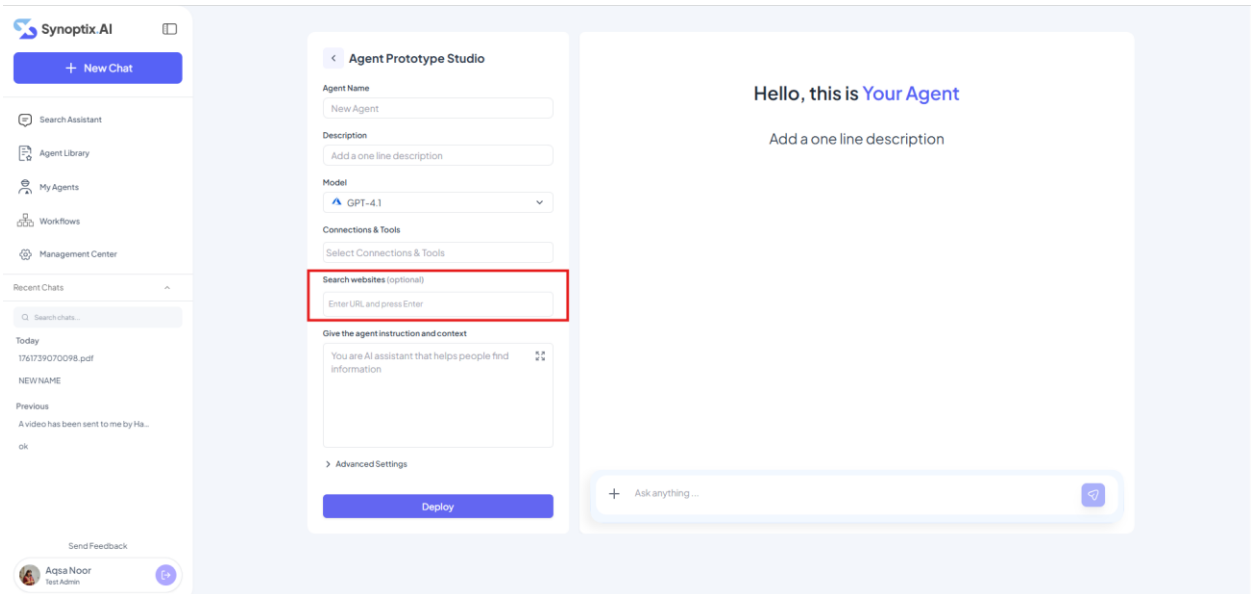
Service	Description	Checkbox
SharePoint	Search, read, and update your company documents.	<input type="checkbox"/>
Outlook	Read and manage your emails, calendars, and tasks.	<input type="checkbox"/>
MS Teams	Search conversations and share updates with your te...	<input type="checkbox"/>
Teradata	Access and analyse your business data at scale.	<input type="checkbox"/>
CosmosDB	Search and use distributed data across your organisa...	<input type="checkbox"/>
Snowflake	Read and query your data stored in the cloud.	<input type="checkbox"/>
DevOps	Track work items and update project progress.	<input type="checkbox"/>
Gmail	Read, search, and manage your inbox.	<input type="checkbox"/>
PowerBi	Retrieve and share business insights from dashboards.	<input type="checkbox"/>
GitHub	Read, track, and update your code projects.	<input type="checkbox"/>
NewsFeed	Get real-time updates and stay informed.	<input type="checkbox"/>
PostgreSQL	Search and access structured data from your databa...	<input type="checkbox"/>
MS Planner	Manage tasks and track project progress.	<input type="checkbox"/>
Dynamics365	Read and update sales, service, and operations data.	<input type="checkbox"/>
Restricted Sharepoint	Access to Selected sharepoint site, folder or file	<input type="checkbox"/>
Blob Storage	Search and explore your Azure Blob Storage.	<input type="checkbox"/>

**Add (0)**

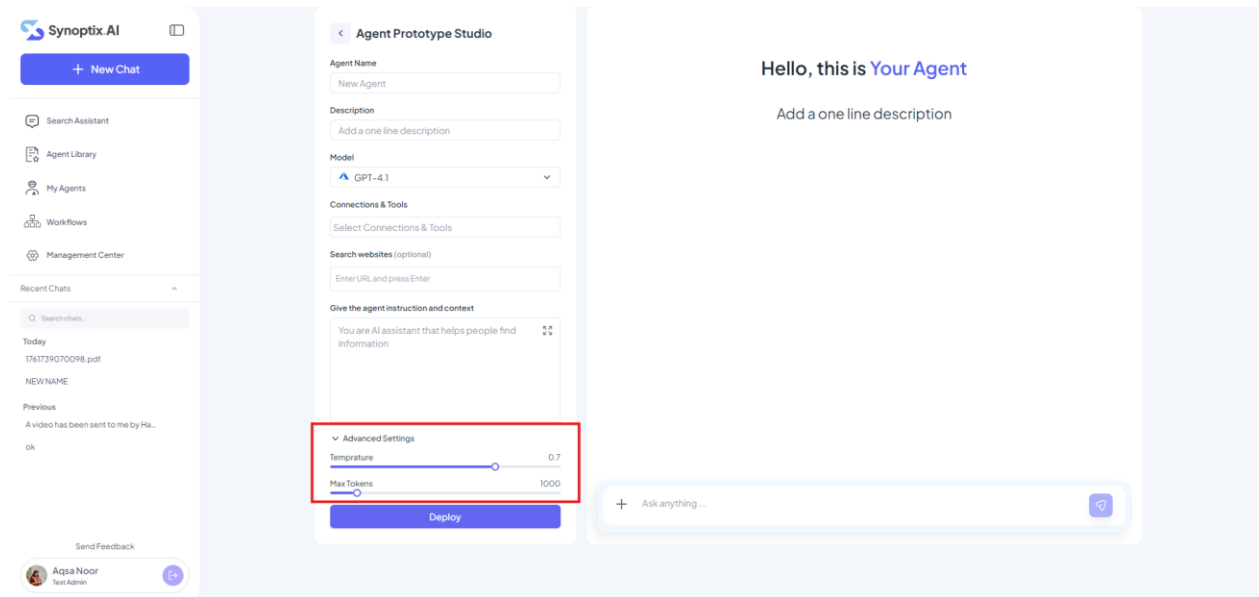
- Select list of **Tools** to add extra functionality to the agent.



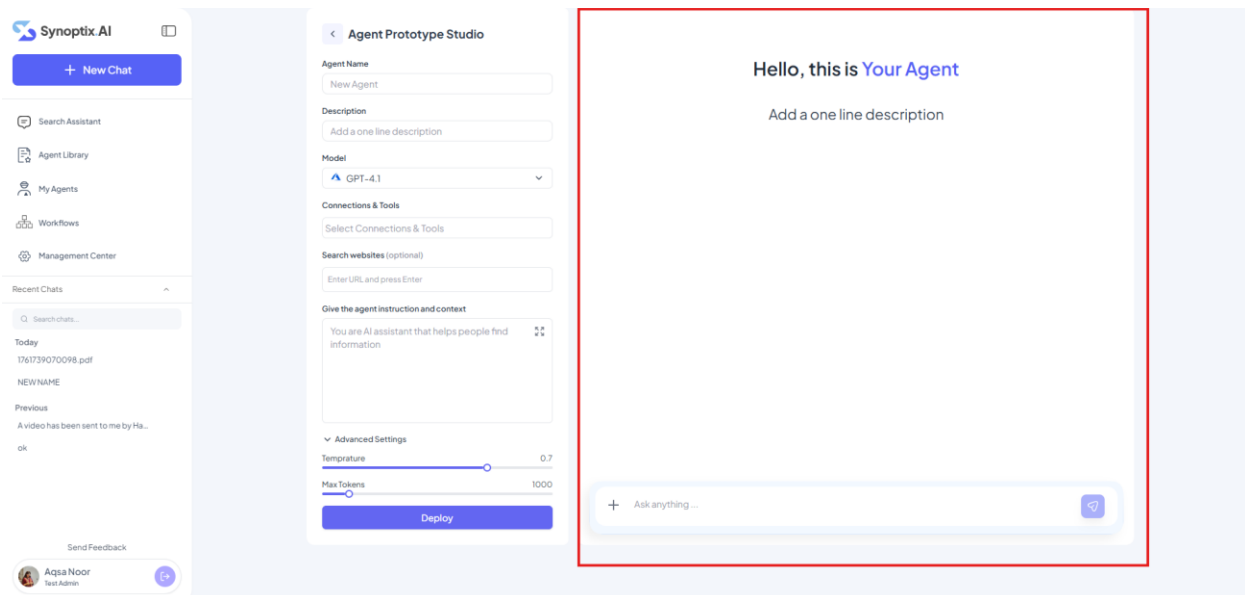
- (Optional) Add allowed websites for searching.



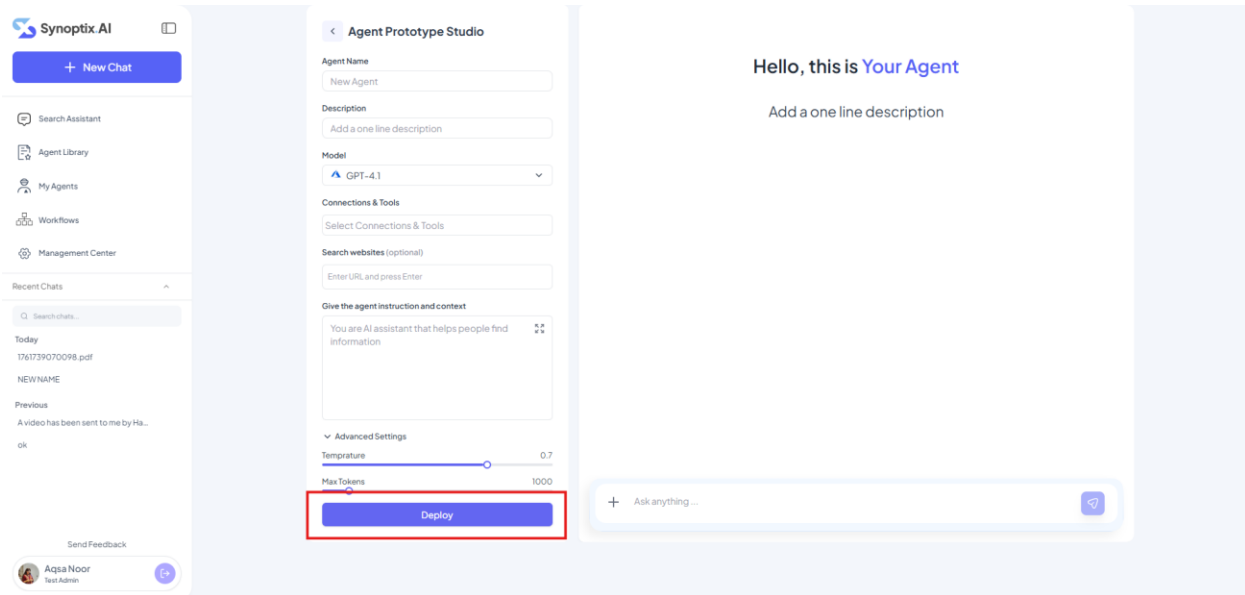
- Open **Advanced Settings** to adjust:
  - Temperature** (controls creativity—lower for accuracy, higher for creative output)
  - Maximum Token Used**



3. On the right side, use the chat playground to
- Search through connected data sources
  - Run selected tools
  - Test how the agent responds based on its roles and responsibilities



4. When you're satisfied with the agent's performance, click Deploy. Your custom agent will now appear in My Agents, and is ready to use.



## Data Repository

The Data Repository stores documents that you want to make available across all chats in Search Assistant.

You can upload files directly from your device or import them from SharePoint. Once uploaded, the document becomes searchable and accessible across every chat session until it is removed.

## Access the Data Repository

1. Go to the left sidebar and click on the Data Repository.

You'll see a table with file details and a search bar at the top.

## Uploading a Document

1. Go to the **Data Repository** from the left sidebar.
2. Click **Upload Document**.
3. Select a file from your device or SharePoint.
4. The file will appear on the list and become available in all chat sessions.
5. Once uploaded, the file will appear in the repository list with Document Name, Last Modified Date, and size.

Tip: You can upload PDFs, Word documents, spreadsheets, presentations, and other supported file types.

## Searching for a Document

Use the search bar at the top of the Data Repository page:

1. Type and search file names.
2. The table will automatically filter and show matching results.

## Manage Uploaded Documents

User can perform additional actions:

1. Download files
2. Delete files
3. Sort and filter the document list

Deleting a file removes access across Search.

## Workflows

Workflows represent how tasks and processes are executed within the application. A workflow (or flow) receives input, processes it through a series of steps, and produces an output.

Workflows are built using connected components, where each component represents a specific step in the process. These steps are arranged as a directed acyclic graph (DAG), allowing you to add agents, tools, and data sources.

This makes workflow's editor useful for automating complex tasks, orchestrating AI-driven processes, and managing multi-step operations across the application.

## Access Workflows

From the **left sidebar**, select Workflows. If you have already created workflows, they will be listed. Otherwise, the list will appear empty.

## Create a flow

1. There are multiple ways to create a workflow:
  - **Create a blank flow:** Click on **New Workflow**, and then click **Blank Workflow**.
  - **Create a flow from a template:** Click **New Workflow**, then choose a **template** to quickly build a workflow based on a predefined structure.

2. After creating a new workflow, the workflow editor opens, and a list of available nodes appears in the left sidebar. These includes:
  - a. Inputs:
    - Input
    - Upload files
  - b. Outputs
    - End
  - c. LLM Nodes
    - Custom Agent/LLM
    - My Agents
  - d. Logic
    - If/else
    - Loop
    - Notes

### 3. Workflow Editor

Use **Workflow Editor** to create, test, and share workflows, which are functional representations of application processes. Here, you add nodes, adjust their settings, and connect them to control how information moves through the workflow.

The editor provides a **drag-and-drop experience**, allowing you to design advanced AI workflows without needing to write complex code. You can connect to a wide range of components, including **Large Language Models (LLMs), data sources, agents, MCP servers, and other tools and integrations.**

#### a. Working with the editor

You can interact with the Workflow Editor in several ways:

- **Move nodes:** Drag nodes across the editor to restructure your flow.
- **Adjust the view:** Zoom in or out using your mouse or use the editor controls to reset the zoom or fit the workflow to the screen.
- **Add annotations:** Use Add Note to place comments or explanations directly on the editor.

#### b. Playground

If your workflow includes any Input node, you can use the **Playground** to test and interact with the workflow in real time. The Playground allows you to:

- Run the workflow
- Chat with the workflow
- View inputs and outputs
- Adjust the LLM's memory and behavior to fine-tune responses

To try this in the Workflow Editor, click on the **Play ▶ button**.

## 4. Add Nodes

Workflows are created by adding and connecting nodes within the workflow editor. Each node performs a specific function, such as running an AI model or accessing a data source.

### a. Add first node

Start by adding your first node (for example, **an input node**) from panel onto the editor. This node collects the user's input and serves as the starting point of the workflow.

### b. Configure node

Configure the input node by adjusting its settings, parameters and review the output fields it produces (for example, **user messages**).

### c. Add and Connect Nodes

Next, add another node to the workflow. For example, in the case of a simple chatbot, add an LLM as the next node to workflow. This node is responsible for generating responses based on the given user's input message.

In the LLM node:

- Select one of the available AI models
- Adjust model parameters such as instructions, response style or limits, temperature and max tokens.
- Add tools and connections

Connect the Input node to the LLM node to pass the user's input text.

Connections are made using **ports/edges**, and each port supports a specific data type.

For example:

- Message ports pass text messages from one node to another
- Configuration ports pass settings or parameters

- Output ports deliver final results

#### d. Add an output node

Add and connect an **Output node** to display the result generated by the LLM model.

#### e. Review data flow

At this point, the workflow defines a complete data path:

- User input flows into the Input node
- The input is processed by the LLM node
- The generated response is shown through the Output node
- You can add more nodes, rearrange connections and adjust settings to extend or refine your workflows.

#### f. Finalize the flow

Once all components are connected and configured, the workflow functions as a single, complete process.

## 5. Nodes Overview:

Nodes are the core elements used to build workflows, while each node is created to handle a specific function.

To add a node to a workflow, select it from the **nodes panel** on the left. Once added, configure the node settings and connect it to other nodes to define how data flows through the workflow.

Each node includes **inputs, outputs, parameters, and controls** that determine how it operates. By default, only the most commonly used options are displayed to keep the interface simple.

- **Controls** allow you to view and adjust all available settings, including optional parameters that are hidden by default.
- **Tool Mode** should be enabled when the node is used together with an Agent node.
- For additional actions such as **Delete** or **Duplicate**, select **Show More (:)**.

To rename a node or update its description, select the node on the editor and click **Edit**. If you want to test a node on its own, click **Run node** to execute it independently.

## Run/test a flow

After building a prototype workflow, you can test it using the **Playground**. The Playground allows you to run and validate your workflow in an isolated environment.

When you run a workflow, the system constructs a **Directed Acyclic Graph (DAG)** from the connected nodes and ports. Based on the data dependencies, nodes are automatically ordered and executed, ensuring each step runs in a correct sequence.

## Manage Workflows

From 'My Workflows' page, you can manage existing workflows using the following options:

### 1. Search Workflows

Use the **search bar** to find a specific workflow by name.

### 2. Sort Workflows

You can sort workflows **alphabetically** or by recently **created date** to quickly find the workflow you need.

### 3. Edit a Workflow

- Locate the workflow you want to edit.
- Click **More** (:), then select **Edit** details.
- Update the **Name** and **Description**, then click **Save**.

### 4. Delete Workflow

- From the Workflows page, locate the workflow you want to delete.
- Click **More** (:), then select **Delete**.