IMPERIAL

Getting started with dAIsy – GenAI platform

Guidance for students, academics, researchers, and professional services staff on how to access and use AI Agents within the dAIsy platform.

Contents

What is dAIsy?

dAIsy is the University's proof-of-concept (PoC) generative-AI platform (Supplied by Cloudforce NebulaOne). It provides safe, cost-controlled access to leading models for learning, teaching, research, and professional services tasks.

Before you start

Read the dAIsy Use Policy guidance.

Getting started

1. Sign in with your University credentials (SSO). Click the 'Sign in with Microsoft' button.
2. Choose from the Official Agents or your Personal Agents.
3. State your goal clearly; provide relevant context or example text.
4. Iterate: review, refine your prompt, and fact-check key claims.
5. For assessments, follow module rules and acknowledge permissible AI use.
6. Save/export results; avoid storing sensitive data.

Citing AI use (assessed work)

Only use AI if your module permits it. When permitted, briefly acknowledge the tool/version and how it was used (e.g., brainstorming, editing).

Help and incidents

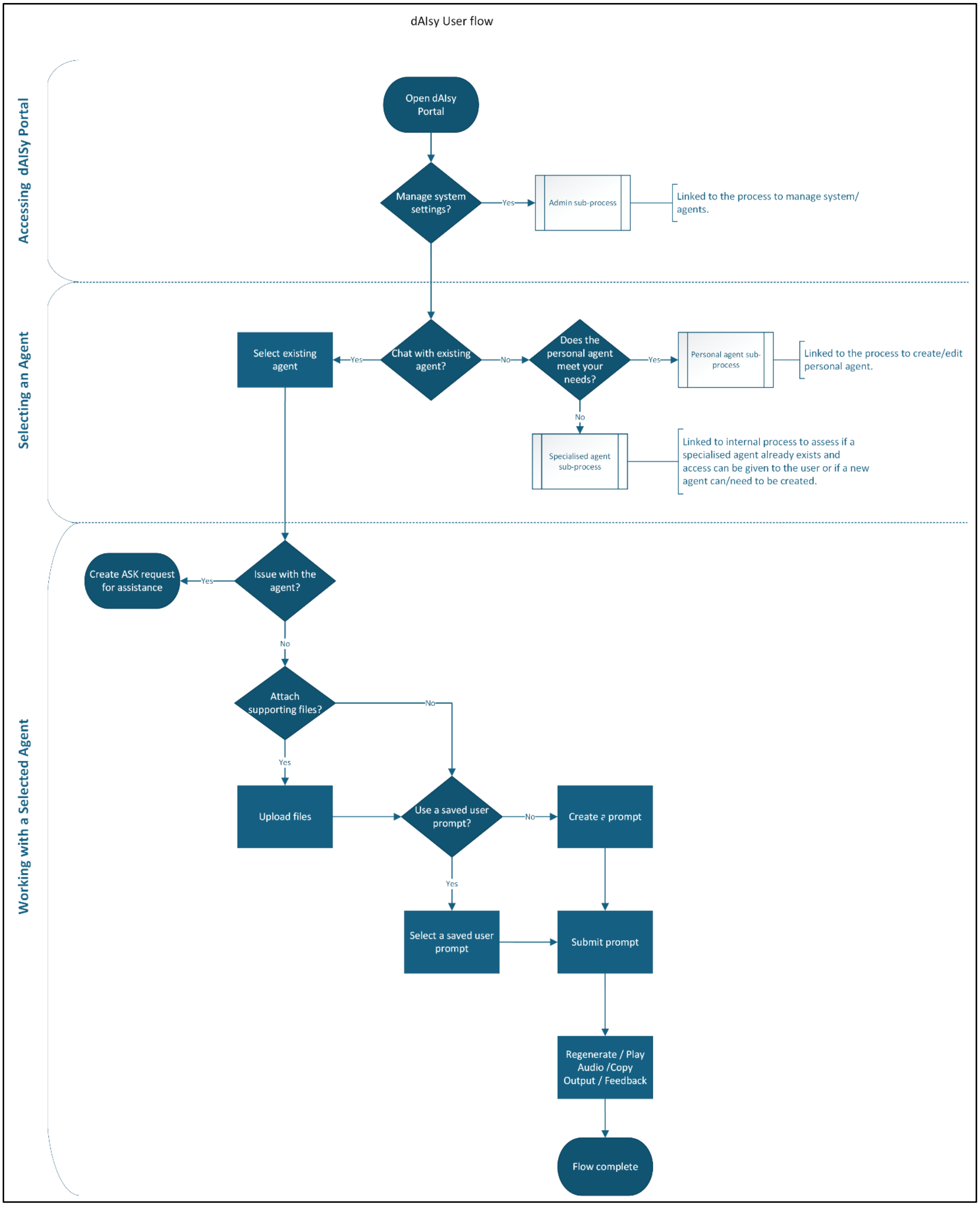
- ICT Service Desk → Category: "Generative AI/dAIsy".
- Report misuse or data concerns immediately.
- See the FAQs and Use Policy for more detail.

Use Cases

1. **Basic User** - Use the default Official Agents provided and create your own Personal Agents. Note: Users have access to default agents and can create their own personal agents. Users can not share their personal agents with anyone else.
2. **Developer Role** - (Access request required) The added ability to request access to Specialised Agents and share these with others in groups. Used for specialised use cases. Specialised Agents are created by approved users with Developer Access, supported by ICT.

   Developer Access is only granted after ICT has reviewed a use case request is recieved. If you require Developer access, please submit a request.
3. **Admin/Management Role** – for ICT Staff use only to manage the platform.

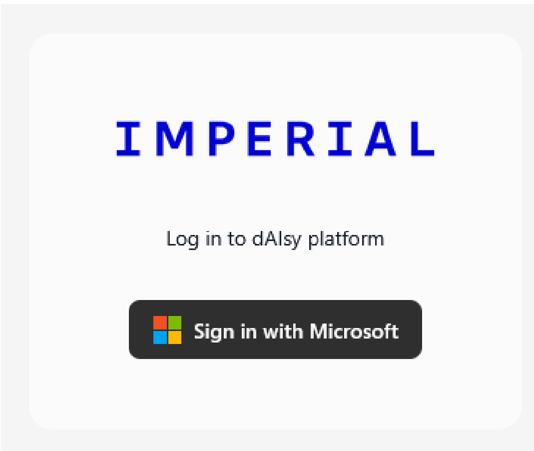
User flow and how to guide



Accessing the dAISy Portal

The dAIsy Portal is accessed via the University's single sign-on system (SSO).

Navigate to the dAIsy portal and log in by clicking on the Microsoft button, which uses your Imperial credentials (username and password) to automatically log you in.

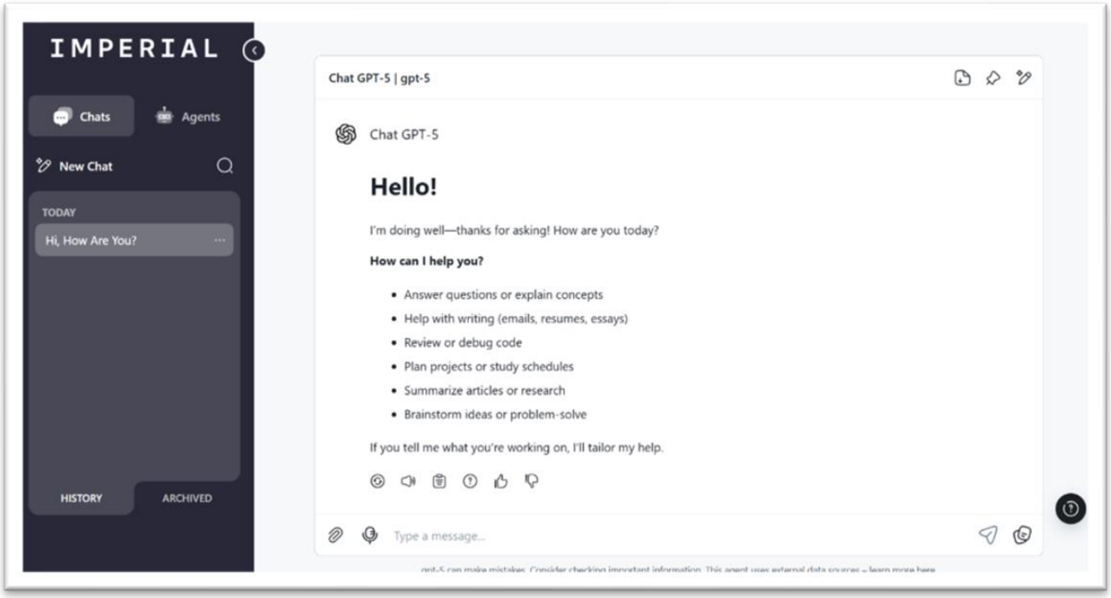


Once you're logged in you will see the portal dashboard, which provides access to Agents, Chats, and support features.

Note: If login problems occur contact ICT ServiceDesk for support.

After login, the **Chats** view is displayed by default.

The **Chats** panel lists recent and archived chats. For first-time users, this area may be empty with the message: "*You don't have any chats. Start a new conversation to see it here.*"



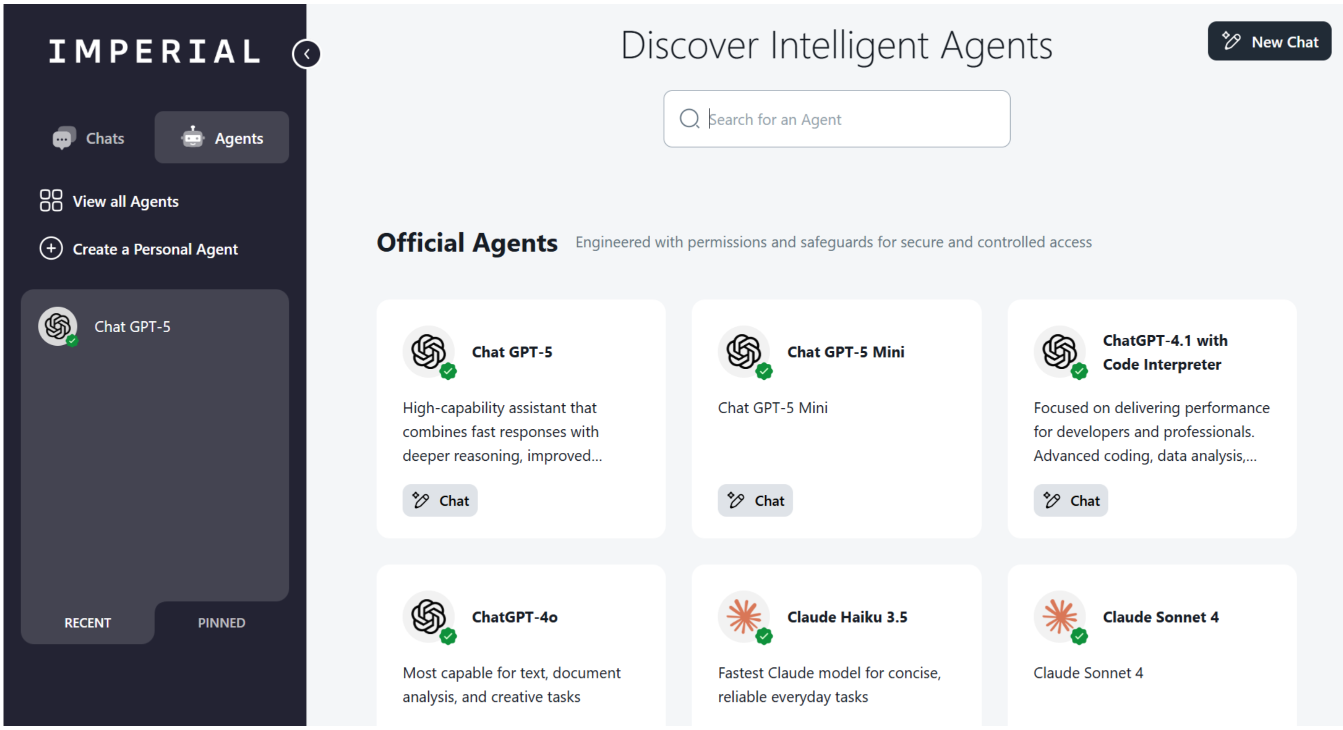
ICT staff who carry out administrative tasks, such as managing system or agent settings, should follow the Admin Sub-Process Guidance. The remainder of this document focuses on using Agents.

Choosing an Agent

Within the **Agents** tab, there are several options for starting work:

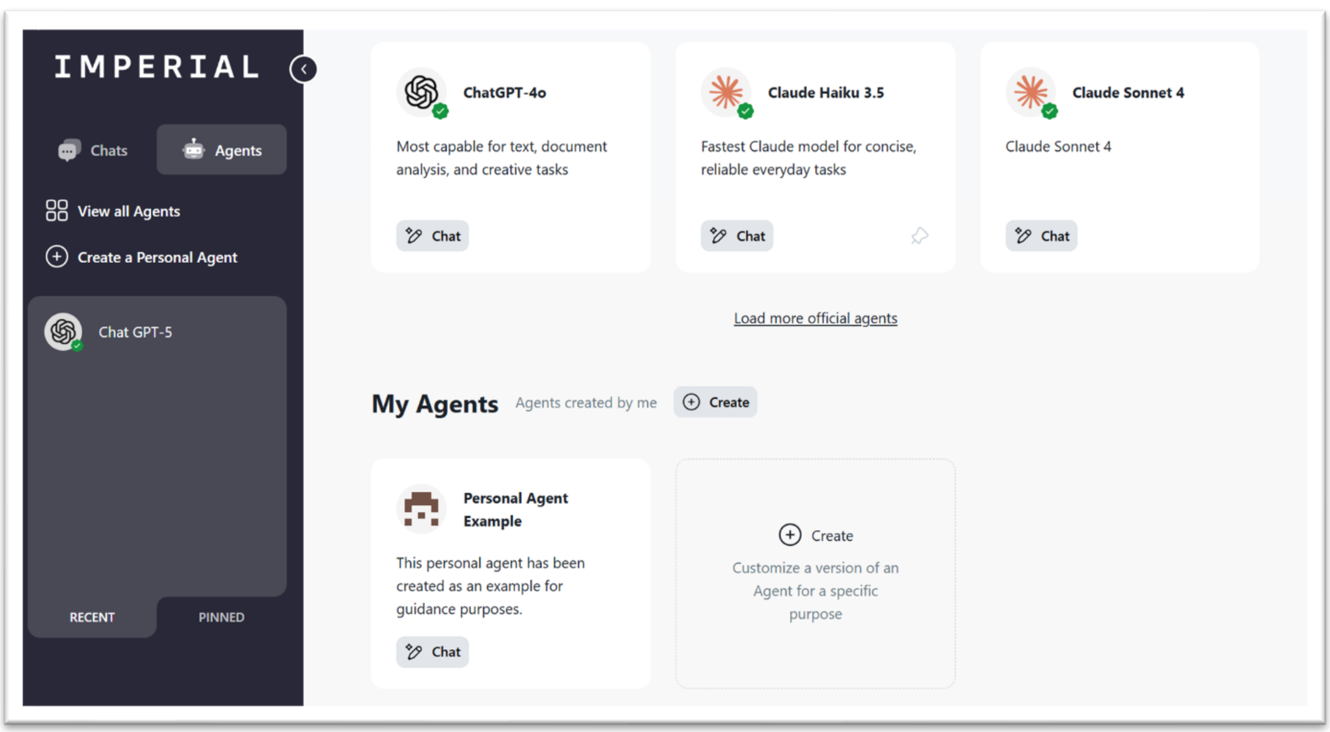
- **View all Agents** - explore and launch official agents provided by the University.
- **Create a Personal Agent** - set up or use an individual agent linked to the user profile.
- **Search for an Agent** - use the search bar at the top of the screen to locate a specific agent by name or keyword.

Recent and **pinned** agents appear in the left-hand panel for quick access.



Viewing Existing Agents

Selecting **View all Agents** displays the catalogue of **Official Agents** (e.g. Claude) provided by the university, as well as any previously created personal agents. These can be launched directly from this view by clicking **Chat** under selected agent.



Creating or Using a Personal Agent

A **Personal Agent** can be created or reused if a tailored workflow is required. This option is available both in the left-hand navigation and in the **My Agents** section of the catalogue. Personal agents are useful where an individual role or context-specific instructions are needed.

- Existing personal agents appear under **My Agents**.
- The **Create** option allows the setup of a new personal agent when required.

Further guidance is available in the Personal Agent Guidance.

Types of Agents in dAISy

Official Agents

Official Agents are centrally provided and maintained by the university. They are pre-configured with safeguards, permissions, and cost controls. Examples include models such as ChatGPT-4o, and Claude.

- Best for: general use such as drafting, summarising, translation, coding, or research assistance.
- Advantages: reliable access, consistent configuration, and College-approved safeguards.
- Limitations: not customisable beyond standard prompt use.

Personal Agents

Personal Agents are user-created or user-owned agents. They allow individuals to define instructions, roles, or behaviours suited to their specific context.

Best for: tasks that need a tailored workflow, repeated instructions, or a role-based agent (e.g. “literature summariser” or “teaching prep assistant”).

- Advantages: can be customised to support individual workflows; reusable once created.
- Limitations: responsibility rests with the creator to ensure compliance with university policies.

When Agents Do Not Meet Requirements

If neither existing agents nor Personal Agents are able to meet the required needs, the next step is to consider a **Specialised Agent**.

- Specialised agents are designed for advanced, departmental, or highly specific tasks.
- The process includes checking whether a specialised agent already exists that can be allocated, or whether a new one needs to be created.

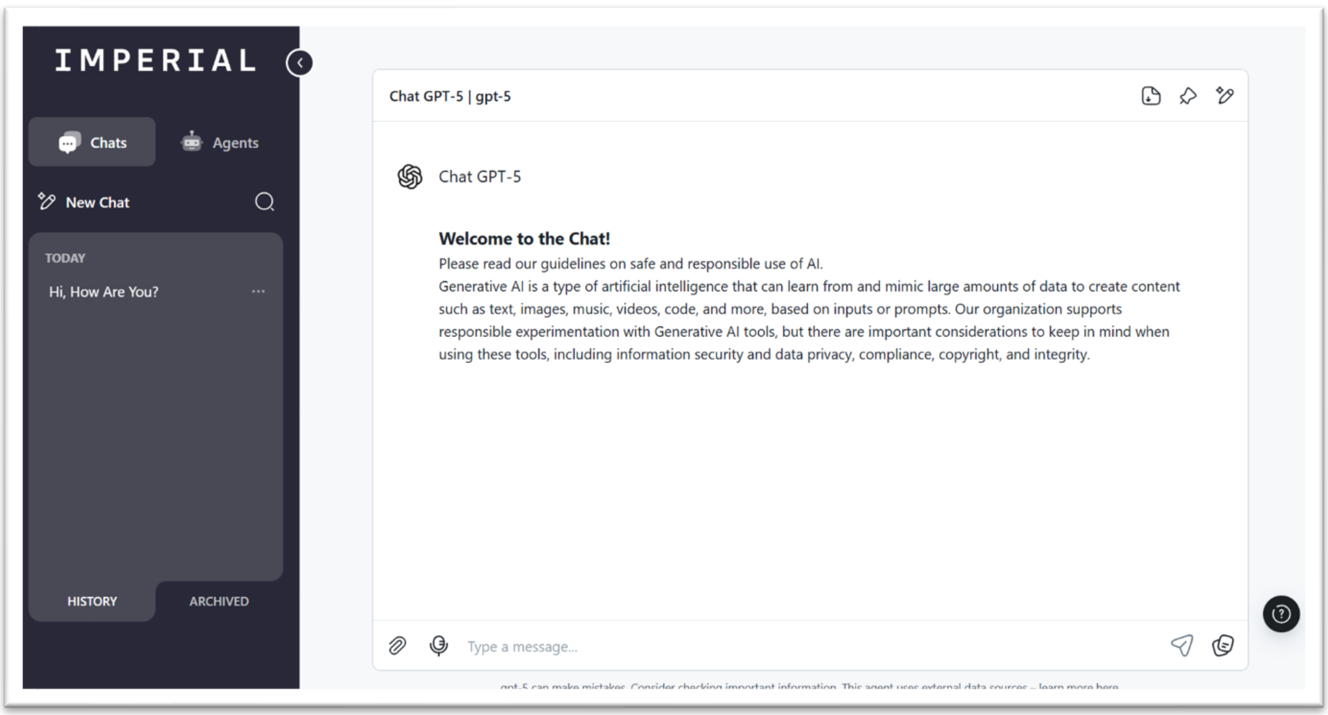
For instructions, refer to the Specialised Agent Sub-Process Guidance.

Working with a Selected Agent

Once an Agent has been chosen, the next step is to begin an interaction. Selecting **Chat** on the agent card opens a new conversation window, where queries can be entered and, if needed, files can be attached. Previous conversations are available under the **Chats** tab for easy reference.

Note: If an agent does not respond as expected due to availability issues or error messages displayed in the interface, submit an ASK Request via the ICT Service Desk under the category Generative AI/dAIsy.

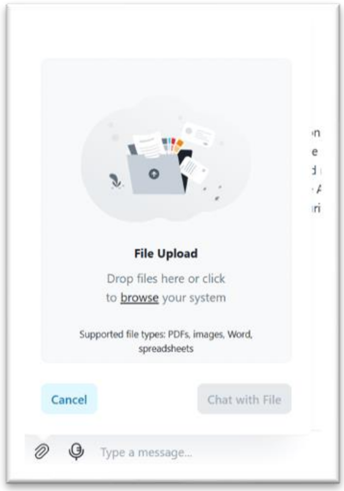
With an active chat window open, the workflow continues by adding supporting files or moving directly to prompts.



Attaching supporting files

Supporting files can be uploaded to provide the Agent with additional context for the task. This is especially useful for activities such as summarising documents, analysing spreadsheets, or drafting content based on reference material.

When selecting the **Upload** option, the file upload window is displayed:



Options for adding files:

- **Drag and drop**: Files can be dragged directly into the upload window.
- **Browse system**: Alternatively, select **browse** to open the file picker and choose from local or shared storage.

Supported file types: PDF documents, Word documents, Image files, Spreadsheets

Once a file is selected, it will appear in the upload window. To proceed, click **Chat with File**. This attaches the file to the session and opens the conversation, allowing the prompt to be applied in relation to the uploaded material.

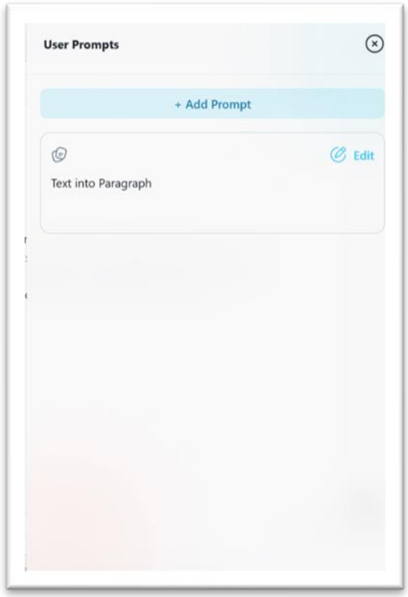
If no files are needed, this step can be skipped and the user may continue directly to providing a prompt.

Using Prompts

Prompts provide the instructions that guide the agent's output. They can be entered directly into the chat area or selected from a set of saved prompts. Using saved prompts can save time and reduce repetitive typing, especially for tasks that are carried out frequently.

Saved User Prompts

The **User Prompts** function can be accessed from the icon at the far right of the prompt navigation bar.



Selecting the icon opens the **User Prompts** panel, where any previously saved prompts are listed.

From this panel:

- **+ Add Prompt** – create a new reusable prompt to store for future sessions.
- Select an existing prompt – click on a saved prompt to load it into the chat.
- **Edit** – make changes to a saved prompt before using it.

When a prompt is selected, it appears in the chat input area. At this point it can be used as-is or further refined for the specific task before being submitted.

Creating a New Prompt

New prompts can be created directly in the chat area in two ways:

- **Typed prompts** – enter instructions directly into the text input field.
- **Voice prompts** – select the microphone icon to record instructions. This option can be useful for speed or accessibility.

If a newly created prompt is likely to be useful again, it can be saved into the User Prompts panel for future sessions.

Submitting a Prompt

Before submitting, confirm that any supporting files are already uploaded (if relevant).

Select **Submit** to send the prompt.

The agent processes the request and returns an output in the chat window.

Reviewing and using outputs

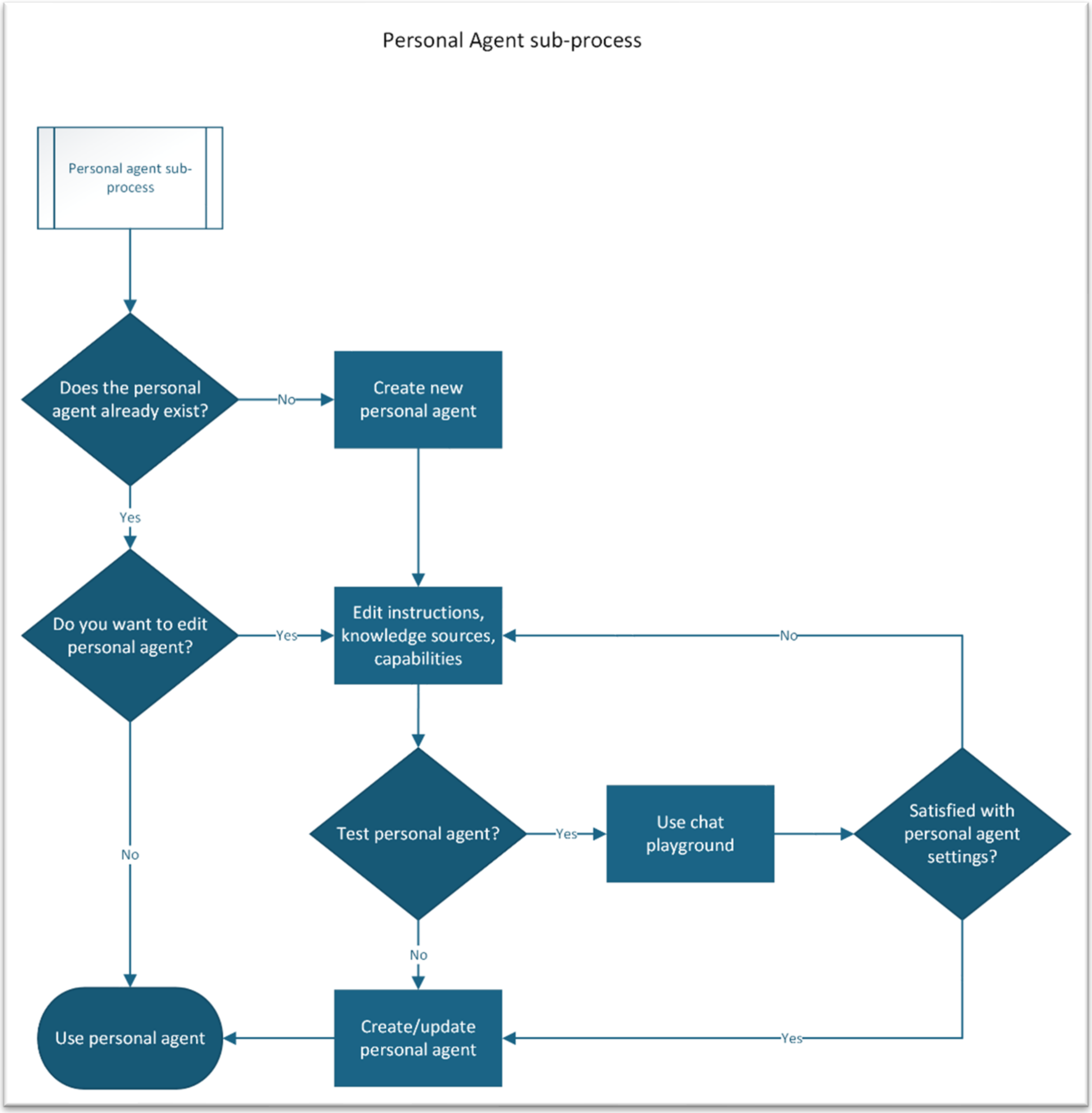
Once a prompt has been submitted, the Agent generates a response which appears in the chat window. Below each output, a number of options are provided that allow the result to be refined, reused, or evaluated.

- **Regenerate** - produces a new version of the output while keeping the same prompt. Useful if the first answer is incomplete, unclear, or does not fully meet requirements.
- **Start Playback** (Audio) - plays the response as audio.
- **Copy to Clipboard** - copies the response text so it can be pasted into another document, email, or application.
- **Show Execution Details** - displays technical details about how the response was generated.
- **Provide Feedback** - each response can be rated with a positive or negative reaction. Submitting feedback helps improve the service over time and ensures that agents are aligned with the needs of students and staff.

Completion of the Process

After reviewing and using the output, the workflow is complete. The chat session can remain open for follow-up prompts, or the portal can be closed. Past interactions remain available under the **Chats** tab for later reference.

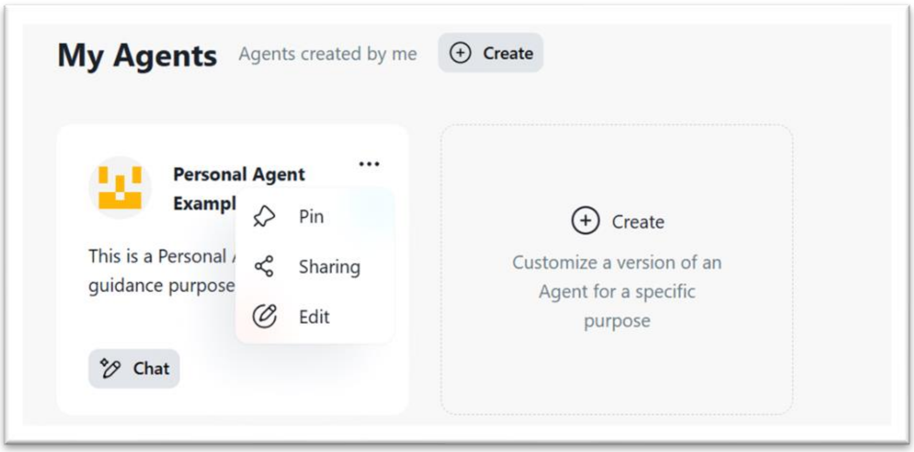
Personal Agent process and guidance



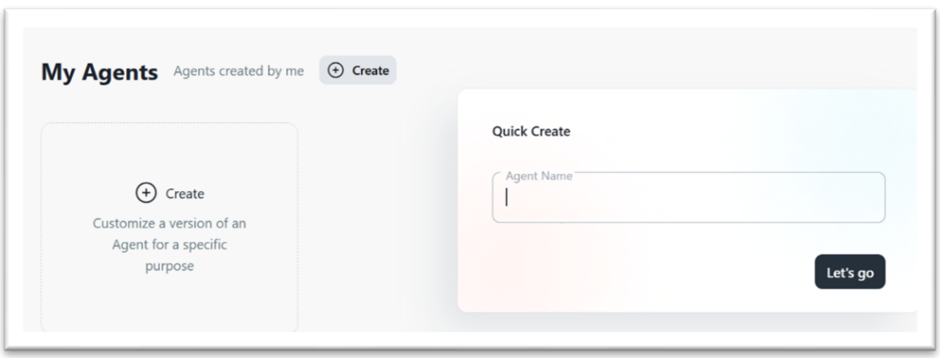
This guidance explains how to create and configure a **Personal Agent** in dAISy.

Personal agents allow a more customised experience in dAISy. They can be configured with specific instructions, knowledge sources, and behaviours, making them particularly useful when official agents do not meet requirements.

- **If a personal agent already exists:** It will appear under **My Agents**. From here, the agent can either be used immediately by selecting **Chat**, or opened in the editing view to update its configuration.

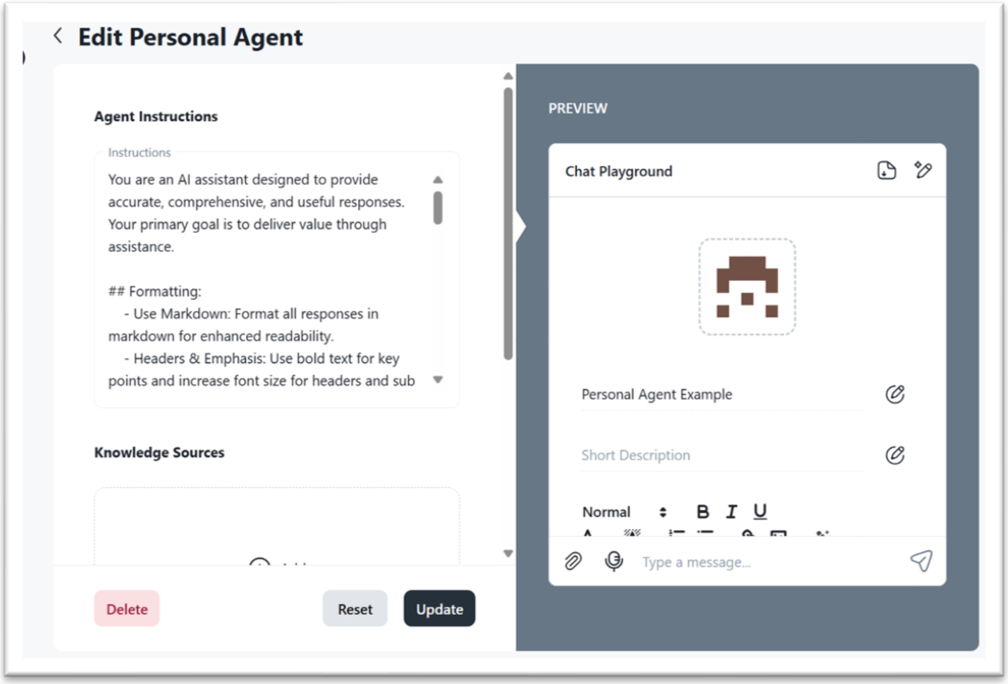


- **If a new personal agent is required:** Select **Create a Personal Agent**. A quick create box will appear where **the Agent must be given a name**. Once confirmed, the Agent opens in the editing view.



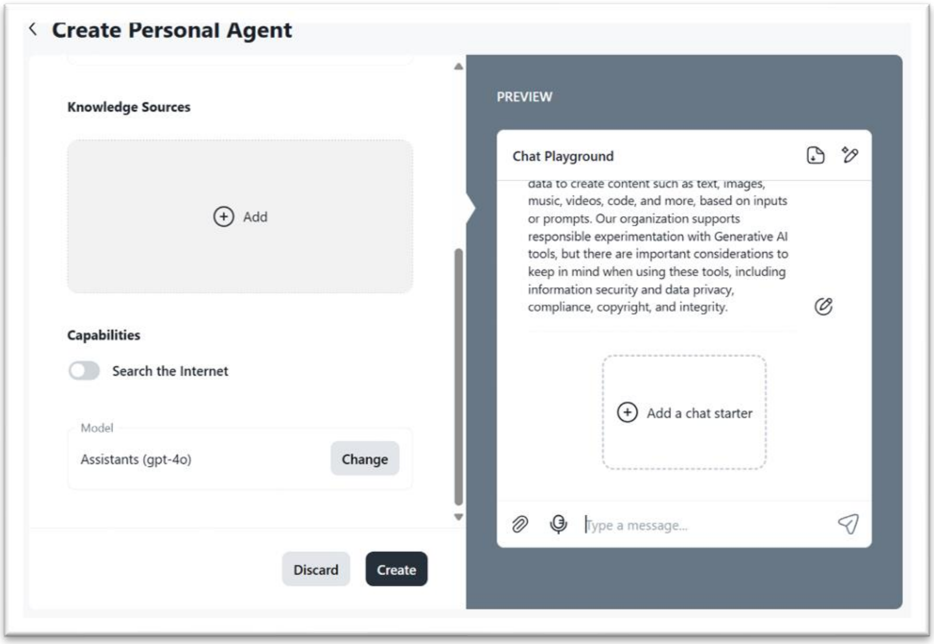
In both cases, editing an existing Agent or creating a new one, the same editing screen, where the Agent can be configured or refined.

Editing the Personal Agent



The editing interface is divided into two panels:

- **Agent Preview** (right-hand panel): This area sets the visible identity of the Agent. Users can update the name, choose an avatar, and add a description to explain the purpose of the Agent.
  A welcome message can be written, which appears each time a new chat is started with the agent. There is also an option to add chat starters that are suggested prompts when new conversation with the agent is initiated.
- **Agent configuration** (left-hand panel): This area defines how the agent will behave. Instructions can be added to guide tone, style, or purpose. Knowledge sources, such as supporting files, can be uploaded to give the agent reference material.
  Capabilities can be enabled, such as allowing the agent to search the internet. Finally, a model can be selected from the available options (e.g. GPT-4o, Claude), depending on the task.



Testing the Personal Agent

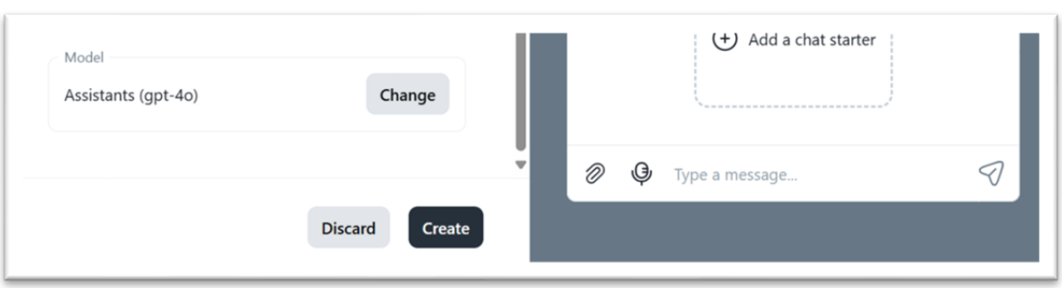
Once settings are in place, the Agent can be trialed in the **Chat Playground**. This provides a safe space to test prompts and observe how the Agent responds.

If the results are not satisfactory, return to the edit view to adjust instructions, add or remove knowledge sources, or change the chosen model. This cycle of editing and testing can be repeated until the agent performs as intended.

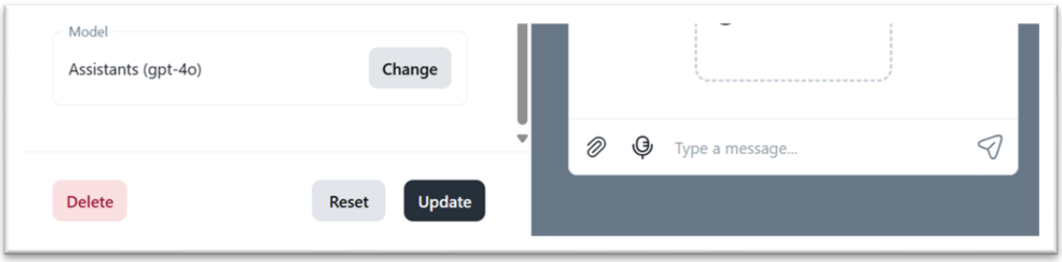
Saving and using the Agent

The available options at the end of the process depend on whether a new personal agent is being created or an existing one is being edited:

- **When creating a new personal agent:** After entering the required details, the agent can be finalised by selecting **Create**. If the agent is not needed, the process can be cancelled by selecting **Discard**.



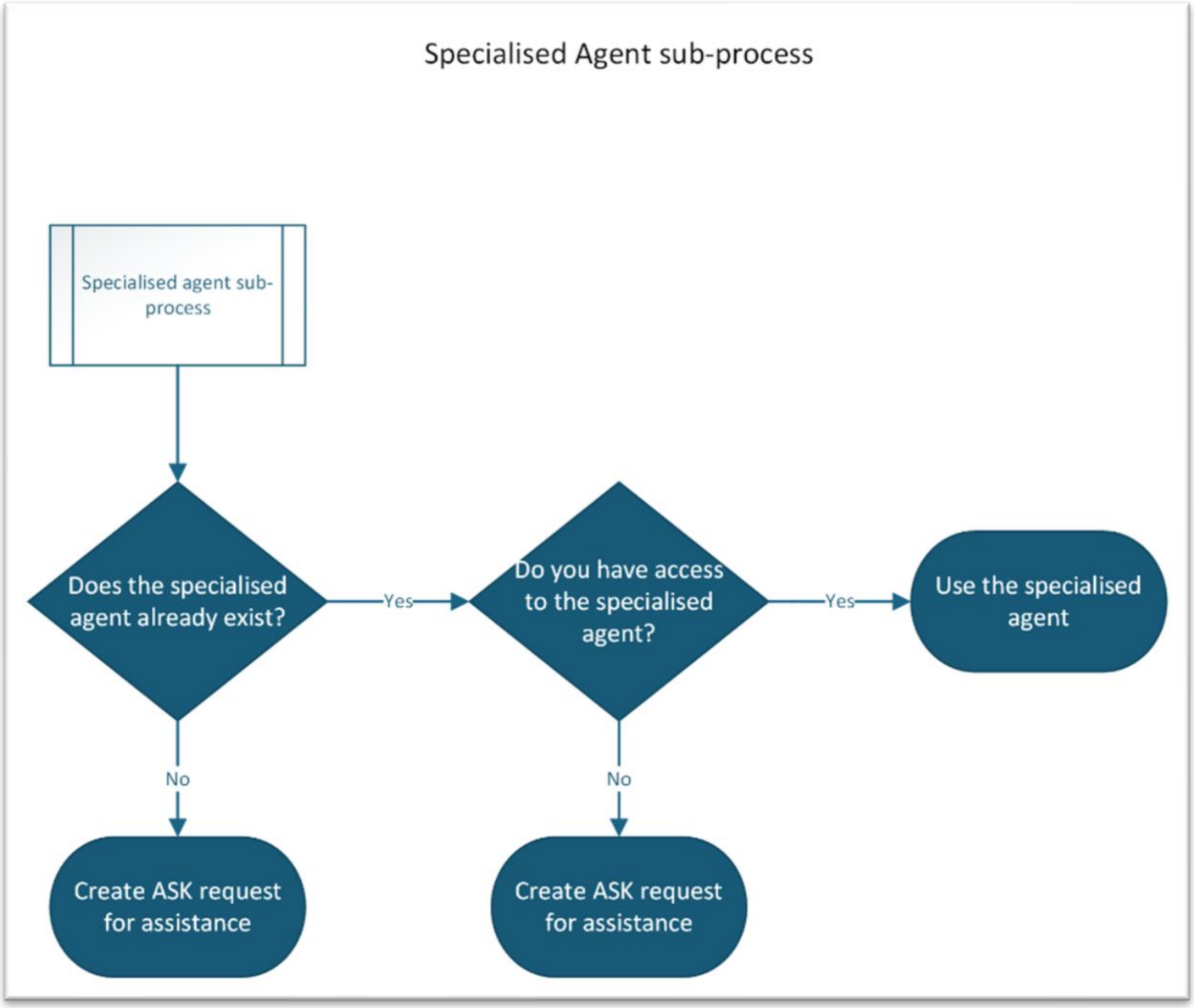
- **When editing an existing personal agent:** Changes can be confirmed by selecting **Update**. If the Agent should be restored to its previous state without saving new edits, select **Reset.** If the Agent is no longer required, it can be permanently removed by selecting **Delete**.



Once a Personal Agent has been created or updated, it will appear under **My Agents**.

From there, it can be launched into a chat session in the same way as an official agent, with the ability to upload files, apply prompts, and review outputs.

Specialised Agent Process and Guidance



Specialised Agents are designed for advanced or highly specific use cases.

They may be created for departmental workflows, complex research projects, or administrative functions that cannot be supported by standard or Personal Agents.

These Agents are not visible to all users, access is controlled, and in some cases, they may need to be created on request.

This pathway should only be followed if neither Official Agents nor Personal Agents are sufficient to meet the requirements.

Requesting a Specialised Agent

Where a need arises that cannot be met by existing tools, please complete the AI Use Cases form. The request should explain:

- The purpose of the agent (e.g. departmental teaching support, research assistant for a particular field).
- The specific requirement that cannot be met by Official or Personal Agents.
- Any supporting context that helps ICT assess the request.

After receiving the request, ICT will check whether a specialised agent already exists that meets the requirement. If so, the request will be assessed for approval to grant access. If no suitable agent exists, the request will be reviewed to determine whether a new agent should be created. Requester will be notified of the outcome and next steps.

Access and use

If access is granted, the specialised agent will be added to the user's Agents list. From there, it can be launched and used in the same way as official or personal agents, with the ability to upload files, apply prompts, and review outputs.

In some cases, users may also be given management rights for the specialised agent. This allows the user to edit the specialised agent's configuration.