

NovusAI User Guide

Version 1.0

Last updated: September 22, 2025

Contents

1	Overview	3
2	Getting Started	3
2.1	Account Creation	3
2.2	Logging In	3
3	Chat	3
3.1	What is Create Documents Mode?	3
3.2	When to Use It	4
3.3	How to Ask for a Document	4
3.4	What Happens Behind the Scenes	4
3.5	What You'll See in the Reply	4
3.6	How Documents Are Created and Viewed	5
3.7	Downloading Your Document	5
3.8	Special Feature: Investment Briefs as Full HTML	5
3.9	Tips for Best Results	5
3.10	Troubleshooting & FAQs	5
3.11	Quick Reference Checklist	5
4	Ask About Database Mode	6
4.1	When to Use It	6
4.2	What You'll See	6
5	Assistant Mode	6
5.1	When to Use	6
6	Dashboard	6
6.1	What You'll See at a Glance	6
6.2	Recent Email Activity (Inbox)	7
6.3	Connected Gmail Accounts	7
6.4	Common Workflows	8
6.5	Status & Error Messages	8
6.6	Keyboard & Accessibility	9
6.7	Privacy & Control	9
6.8	Quick Start (Checklist)	9
6.9	FAQs	9
6.10	New: User Panel (added — visible to all users)	10
6.11	Admin Panel	10
6.12	New: File Management / File Storage (added)	10
6.13	New: User Management (Admin only) (added)	11
6.14	Additional Common Workflows (added)	12
6.15	Additions to Quick Start (Checklist) — (added)	12
6.16	Additional FAQs (added)	12
7	Email Polling & Backups	13
7.1	Email Polling — What It Does	13
7.2	What You'll See	13

7.3	Timing & Limits	13
7.4	Troubleshooting	14
7.5	System Backups — When and What’s Stored	14
7.6	Privacy & Control Reminders	14
7.7	Quick Tips	14
8	Uploads	15
8.1	What Uploads Do	15
8.2	Supported File Types	15
8.3	How to Upload	15
8.4	What Happens Behind the Scenes	16
8.4.1	Title & Content Extraction	16
8.4.2	Executive Summary	16
8.4.3	Search Indexing	16
8.4.4	Safety & Cleanup	16
8.5	Progress & Status	16
8.6	Using Your Uploads	17
8.7	Tips for Best Results	17
8.8	Privacy & Control	17
8.9	FAQs	17
8.10	Quick Start (Checklist)	17
8.11	Why Larger Documents Can Take Longer	18
8.12	What you might notice in the UI	18
8.13	Tips to speed things up	18
9	Payment	19
9.1	Understanding Your Subscription Status	19
9.2	How to Top-Up Usage	19
9.3	Notes & Tips	19
10	GDPR Compliance	20
10.1	Overview	20
10.2	Lawful Basis & Purpose Limitation	20
10.3	Data Subject Rights and How to Exercise Them	20
10.4	Data Minimization & Retention	21
10.5	Security Controls	21
10.6	Processing of Email Data and Third-Party APIs	22
10.7	International Data Transfers	22
10.8	Processors, Subprocessors & Contracts	22
10.9	Data Protection Impact Assessments (DPIA) & Risk Management	23
10.10	Automated Decision Making & Transparency	23
10.11	Incident Response & Breach Notification	23
10.12	Operational Recommendations for Controllers / Admins	23

1 Overview

NovusAI is a secure, private workspace that transforms your PDFs, emails, and notes into decisive, citation-backed documents. Generate investor-ready briefs, legal case memos, strategy notes, and executive summaries—each traced to exact source passages for auditability. Under the hood, NovusAI indexes your content for precise retrieval, enforces evidence hygiene, and exports to PDF, HTML, or Markdown for fast sharing.

Whether you need a quick fact from a thread or a board-ready brief, NovusAI compresses research and review cycles so leaders decide faster with confidence—without leaving your workspace.

Upload. Ask. Create.

2 Getting Started

2.1 Account Creation

1. Go to <https://novusai.us>.
2. Click **Click Log in and then register**.
3. Fill in your name, email, and password.
4. Verify your email address by clicking the link sent to your inbox.

2.2 Logging In

After verification:

- Click **Login**.
- Enter your credentials.
- Click **Submit**.

Warning

Forgot your password? Click **Forgot Password** on the login page to reset it securely.

3 Chat

3.1 What is Create Documents Mode?

Create Documents Mode turns your uploaded documents and emails into professional, ready-to-share outputs (Investment Briefs, Legal Case Briefs, Strategy Memos, etc.). Every draft is built from your sources and includes citations so you can see exactly where each claim came from.

3.2 When to Use It

- Investment Briefs from pitch decks, deal docs, and financial emails
- Legal Case Briefs from contracts, compliance, or dispute threads
- Strategy/Policy Memos from market research and internal reports
- Launch/Go-No-Go Notes from QA logs and ops checklists
- Executive Summaries for board updates, investor packets, or leadership reviews

Tip

If you're thinking: "Summarize it, in the best detail possible," this is the mode to use.

3.3 How to Ask for a Document

Switch to Create Documents Mode in your chat UI (toggle or send-button option). Type your request in plain language.

Examples:

- "Create an investment brief on Divine Living Goa."
- "Write a legal case brief on the property dispute emails."
- "Prepare a strategy memo based on our AI market analysis docs."

3.4 What Happens Behind the Scenes

1. The system searches your uploads and picks the most relevant files.
2. It pulls precise matching passages ("snippets/bodies") from those files.
3. It chooses the right document type: Investment Brief, Legal Case Brief, Strategy Memo, Policy Memo, Launch Decision, or Executive Brief.
4. It drafts a structured document in Markdown using only those sources.
5. It attaches citations so you can trace every key statement back to the original file.

3.5 What You'll See in the Reply

- A structured document with clear sections (e.g., Introduction, Highlights, Financials, Risks, Next Steps).
- Bulleted lists and tables when helpful.
- Inline citations pointing to your uploaded sources.
- For Investment Briefs, an optional polished HTML pamphlet.

3.6 How Documents Are Created and Viewed

Drafting: The AI writes in Markdown for clean structure and easy conversion. **Preview:** You'll see a trimmed preview in the chat. **Full View:** Click "Show Document" to open the Document Viewer, where you can read, switch views, and copy any section.

3.7 Downloading Your Document

Inside the Document Viewer you can:

- Download as PDF — best for sharing a fixed, print-ready version.
- Download as HTML (Investment Briefs only) — preserves the full, brochure-like design.
- Copy Markdown — paste into Notion, Docs, Word, or GitHub.

3.8 Special Feature: Investment Briefs as Full HTML

Investment Briefs render as a polished HTML pamphlet with professional formatting, styled headings, and tables.

3.9 Tips for Best Results

- Be specific: "Create an Investment Brief on Divine Living Goa villas focusing on IRR, ROI, and target buyers."
- Ask for numbers: "Include IRR, ROI, MOIC, and payback period if available."
- Request the right format: "Write a legal case brief under contract law."
- Upload key docs first: The AI can only use what you've provided.

3.10 Troubleshooting & FAQs

- **Why is my document short?** Not enough relevant sources. Upload more targeted files.
- **Why are some sections missing numbers?** Upload financials or specify what to include, then re-run.
- **Can I edit before downloading?** Yes. Use "Show Document," tweak the Markdown, then export.
- **Where do citations point?** They link back to the exact source passages.

3.11 Quick Reference Checklist

1. Toggle "Create Documents" in chat UI.
2. Ask for the doc you need.
3. Review the draft with citations.
4. Click "Show Document" for the full version.

5. Export: PDF, HTML, or Markdown.

4 Ask About Database Mode

Not every question needs a polished brief. Sometimes you just need a quick answer straight from your files.

4.1 When to Use It

- Quick fact checks (“What’s the address in the lease?”)
- Numbers lookups (“What’s the IRR in the Excel model?”)
- Finding exact quotes (“Which clause mentions liability?”)

4.2 What You’ll See

A short, direct answer with matching snippets. No sections or summaries.

5 Assistant Mode

Assistant Mode is the simplest way to interact with NovusAI. It sends your questions directly to the OpenAI API with no connection to your database.

5.1 When to Use

- Quick broad questions (“Explain quantum computing”, “Write a poem about autumn”).
- Brainstorming or creative tasks.

6 Dashboard

The Dashboard gives you a clear, real time snapshot of your account activity and connected inboxes. From here you can see usage stats, review recent email activity saved in NovusAI, and manage your connected Gmail accounts.

6.1 What You’ll See at a Glance

Four stat cards at the top:

- **Emails Processed** — Number of emails NovusAI has ingested and analyzed for your account.
- **Documents Uploaded** — Total files you’ve uploaded (PDFs, docs, images, etc.).
- **AI Tasks Completed** — Count of completed AI operations (briefs, memos, analyses, etc.).

- **Monthly Usage** — Your percent of monthly quota used (shown with two decimals, e.g., 23.45%).

Tip

Stats refresh automatically when you open Dashboard. Use Refresh buttons in sections to update on demand. If a number looks off, wait a moment and refresh — large uploads and inbox syncs can take time to appear.

6.2 Recent Email Activity (Inbox)

A table lists emails that NovusAI has stored in its database for analysis (this is separate from your live Gmail inbox):

Columns

- **FROM** — Sender name or address
- **SUBJECT** — Email subject (hover to see the full line if truncated)
- **STATUS** — Processing state with a small status dot:
 - Green dot = Processed
 - Yellow dot = Pending (still being analyzed or queued)
 - Red dot = Error (analysis failed; try again later)
- **SIZE / DATE** — Message size and received date
- **ACTIONS** — Remove deletes this email record from NovusAI's database view

Paging Controls

- Use ← Prev and Next → to navigate pages
- Page indicator shows current page and total items

Warning

Remove only deletes the stored copy/index inside NovusAI. It does not delete the original email from Gmail.

If an item fails to remove, try **Refresh** and retry. If the issue persists, check your network and sign in state.

6.3 Connected Gmail Accounts

This panel shows the Gmail accounts linked to NovusAI.

- If you have accounts linked, you'll see each email address plus a **Disconnect** button.
- If none are linked, you'll see a **Get Gmail Connection Link** button.
- After requesting a link, a secure authorization window opens. Complete the steps to connect Gmail.

Actions

- **Get Gmail Connection Link** — Generates a secure OAuth link in a popup window
- **Complete Gmail Connection** — If a link has already been generated, you can click to re-open it
- **Disconnect** — Unlinks the account from NovusAI (you can reconnect later)
- **Refresh** — Re-load the list of linked accounts

Tip

If nothing happens when you click **Get Gmail Connection Link**, your browser may be blocking pop ups. Allow pop ups for your NovusAI domain and try again. You can link multiple Gmail accounts; they will appear in this list in reverse chronological order of when they were added.

6.4 Common Workflows

A) Check today's progress

1. Open Dashboard
2. Scan the Emails Processed and AI Tasks Completed cards
3. Open Recent Email Activity to see newest items and statuses

Remove a sensitive email from NovusAI storage

1. In Recent Email Activity, find the row
2. Click **Remove** → confirm in the popup
3. (Optional) Click **Refresh** to verify it's gone

Connect a new Gmail account

1. Go to Attached Gmail Accounts
2. Click **Get Gmail Connection Link**
3. Complete the Google sign in/consent popup
4. Click **Refresh** to confirm the account appears

D) Disconnect a Gmail account

1. In Attached Gmail Accounts, click **Disconnect** next to the account
2. Confirm in the popup — you can reconnect anytime

6.5 Status & Error Messages

- **Loading...** — Data is being fetched
- **Error: ...** — A short explanation of what went wrong

- **Working...** / **Removing...** / **Disconnecting...** — An action is in progress

If something fails:

1. Click **Refresh** and retry
2. Ensure you're signed in and your network is stable
3. For Gmail linking, allow pop ups and try again

6.6 Keyboard & Accessibility

- In confirmation dialogs, **Esc** cancels and **Enter** confirms
- Buttons include busy states and accessible labels for screen readers

6.7 Privacy & Control

- The Inbox table represents emails stored/indexed for analysis inside NovusAI
- **Remove** deletes NovusAI's stored record of that email (it doesn't erase your email in Gmail)
- You can disconnect Gmail at any time from Attached Gmail Accounts

6.8 Quick Start (Checklist)

1. Open Dashboard from the sidebar
2. Review Stats at the top
3. Browse Recent Email Activity; use Prev/Next to page
4. Link Gmail with **Get Gmail Connection Link** (if not connected)
5. Use **Remove** to delete stored items from NovusAI when needed
6. Click **Refresh** to update accounts or tables

6.9 FAQs

Why don't my latest emails show up yet? They may still be syncing or processing. Wait a moment and click **Refresh**.

Does Remove delete the email from Gmail? No. It removes NovusAI's stored/indexed copy only.

I don't see the Gmail authorization window. Enable pop ups for your NovusAI domain and retry **Get Gmail Connection Link**.

Monthly Usage looks high. What does it mean? It reflects the percentage of your monthly quota consumed by processing and AI tasks.

6.10 New: User Panel (added — visible to all users)

This is an additional panel available on the Dashboard for every signed-in user (your personal account controls).

What you can do:

- View your account details — Username, Email, Role, and short User ID.
- Change Email — Start an email-change flow: enter a new email, the system sends a 6-digit verification code, enter the code to confirm. The Dashboard updates the displayed email after verification.
- Change Password — Secure password update (current password, new password, confirm).
- Manage File Storage — A button to open File Storage (see section 12) to view/download/delete files you own.

Notes:

- Forms include accessible labels and keyboard handling (**Esc** cancels, **Enter** confirms).
- Email and password flows show clear busy/error/success states and will prompt you on failure (network/sign-in issues).

6.11 Admin Panel

Admins now have an Admin Panel block on the Dashboard that provides quick operational metrics and links.

What you'll see:

- Admin Metrics — top-line summary: Total Users, Gmail Accounts, Emails Indexed, Dashboards.
- Manage Users — a button that opens the User Management page for role edits and log access (see section 13).
- Refresh Summary — refresh the admin metrics on demand.

Admin rules & cautions:

- Admin controls require your account role to be Admin. If you do not see this panel, request admin access from someone in your organization with Admin rights.
- Actions that alter user roles are audited; use them carefully.

6.12 New: File Management / File Storage (added)

A full File Storage page is available to manage uploaded documents, images, and exported items.

Summary cards:

- Total Files — total files stored for your account/organization

- Storage Used — human-readable aggregate size

Recent Files table (columns):

- Name — file name + type icon (PDF, image, spreadsheet, email, etc.)
- Type
- Size
- Last Modified
- Actions — View, Download, Delete

Actions explained:

- View opens an embedded viewer (PDFs and images inline; other types in a preview iframe).
- Download streams the file to the browser with an appropriate filename.
- Delete removes the file from the NovusAI database and vector index (it will no longer be searchable or used in AI responses).

Important:

- Deleting a file is permanent in NovusAI — it removes the DB record and search/index entries. The original local files (if you uploaded from a local machine or external storage) are not affected outside NovusAI.
- Preview and download attempts may show an error if the backend cannot stream the file (network or server issue). Retry or refresh the page.

6.13 New: User Management (Admin only) (added)

Admins can manage organization users and view system logs in a dedicated User Management page.

User table columns:

- Username
- Role (Viewer / Editor / Admin)
- Set Role — dropdown that lets permitted admins change another user's role
- User ID — UUID or DB id

Role change behavior:

- Only a user with a higher role/rank can change another user's role.
- You cannot change your own role from this panel.
- Changes are applied via the server and will be reflected in Dashboard stats after refresh.

Logs (Admin-only):

- A logs table lists recent server log files.

- Admins may View (open in a modal) or Download logs for offline inspection.
- Log viewer supports plain text display with a close button and keyboard support (Esc to close).

Audit & safety:

- Role changes and critical admin actions are logged. Keep good change records and limit admin users to trusted personnel.

6.14 Additional Common Workflows (added)

E) Change your account email / password

1. Open User Panel on Dashboard.
2. Click Change Email or Change Password and complete the form.
3. Follow verification prompts (email code for change-email).
4. Refresh Dashboard to see updated account details if needed.

F) Manage files

1. From User Panel or Dashboard, click Manage File Storage.
2. Preview a file using View, download with Download, or permanently remove with Delete.
3. If you delete a file and expected search results still show it, refresh the dashboard and re-run your query (indexing cleanup may take a moment).

G) Admin: update a user role

1. Open Admin Panel → Manage Users.
2. Select a user, choose a new role (if permitted), and click Apply.
3. Confirm the change and refresh the page to verify.

6.15 Additions to Quick Start (Checklist) — (added)

After step 6 in the original Quick Start, you can add:

1. Open User Panel to change your email or password or to jump to File Storage.
2. If you're an Admin: open Admin Panel → Manage Users to edit roles or view logs.
3. Visit File Storage to manage uploaded documents (preview/download/delete).

6.16 Additional FAQs (added)

Q: Where is File Storage? A: Open User Panel → Manage File Storage or the sidebar link to File Storage from the Dashboard.

Q: If I delete a file, will it be removed from AI training or search immediately?
A: Deleting removes the DB record and vector index entry. Search results and RAG

responses will no longer include that file after indexing cleanup finishes (usually immediate for the index, but allow a short window and refresh).

Q: Who can change user roles? A: Only Admins and users with a higher role/rank can change roles. You cannot change your own role via User Management.

Q: How do I change my email if I no longer have access to my old address? A: The system sends a verification code to the new address. If you cannot receive verification codes at the new address or you've lost access to the old account used for login, contact your organization's Admin for assistance.

Q: Where can I access logs? A: Admins can access logs from Admin Panel → Manage Users → Logs and use the View / Download actions.

7 Email Polling & Backups

7.1 Email Polling — What It Does

- Checks for new Gmail messages ~every 15 seconds (server-side).
- Fetches a small batch (5 newest) per cycle to stay responsive and within Gmail API limits.
- Uses Gmail Message ID + last-seen tracking so each email is indexed once (dedupe).
- Sanitizes content before storage: decodes quoted-printable, strips invisible characters, converts HTML → text when needed, replaces links with [link removed].
- Saves a clean copy to NovusAI's database (separate from your Gmail account).
- Builds a private search embedding in your per-user Qdrant collection so features like Ask About Database and Create Documents can find it instantly.
- Adds a small "title slot" embedding from the subject line to improve name/title recall.

7.2 What You'll See

- New messages usually appear in **Recent Email Activity** within moments. Click **Refresh** to update the table.
- The **STATUS** column shows *Processed*, *Pending*, or *Error* with a colored dot.
- **Remove** deletes NovusAI's stored/indexed copy only — your original Gmail remains untouched.

7.3 Timing & Limits

- Poll interval: ~15 seconds between cycles.
- Batch size: Up to 5 newest per user per cycle.
- Large backlogs or API limits can slow first-time syncs.

7.4 Troubleshooting

- Don't see a new message yet? Wait a minute and click **Refresh**.
- Item stuck in **Pending**? It usually clears on its own. If not, try disconnecting/reconnecting Gmail.
- After you **Disconnect** an account, polling pauses for that account until you reconnect.

7.5 System Backups — When and What's Stored

Schedule

- Every Sunday at 12:00 PM (server local time).
- Backups run in the background; you can keep using the app.

What Gets Backed Up

- SQL database snapshot (documents, emails metadata, indices, counters, etc.)
- Qdrant vector index snapshot (your private per-user embeddings used for fast search)

Where Backups Are Stored

- Qdrant backups: saved to the server's Qdrant backup directory (default: `/qdrant_backups`).
- SQL backups: saved to your server's configured SQL backup location (as set by your deployment's `Sql_Manager` configuration).

Retention

- The system automatically prunes the oldest backup(s) after each run to keep storage healthy. (Exact retention depends on your server configuration.)

Restore

- If you ever need a restore, contact your administrator or support with the date/time of the needed backup. Restores bring back the SQL data and the vector index to a consistent point.

7.6 Privacy & Control Reminders

- The Inbox table reflects emails stored/indexed inside NovusAI for analysis.
- Using **Remove** eliminates NovusAI's stored copy but does not delete the email from Gmail.
- You can **Disconnect** Gmail anytime; polling stops for that account until you reconnect.

7.7 Quick Tips

- Use **Refresh** in Dashboard sections to pull the latest data after large inbox changes.

- For live links, open the original message in Gmail; stored copies show [link removed] for safety.
- When scheduling matters (e.g., backups), remember the times use the server's local timezone.

8 Uploads

Uploads turn your files into searchable, cite-ready knowledge you can use with Ask About Database and Create Documents Mode.

8.1 What Uploads Do

When you upload a file, NovusAI:

- Saves a secure working copy in your workspace
- Extracts text (with OCR for scans/images)
- Generates an Executive Summary of the content
- Indexes the full text for search (keywords + semantic vectors)
- Makes the file instantly usable in briefs, memos, and fast lookups

8.2 Supported File Types

- **PDFs** — native or scanned; OCR is applied to pages that lack a text layer
- **Images** — PNG, JPG, JPEG, WEBP; OCR for text in images + AI scene/caption tags
- **Text** — TXT, Markdown
- **CSV** — parsed to text for quick search (first ~100 rows are ingested for speed)
- **EML** — raw email files; headers + body are normalized and indexed
- **DOC/DOCX** — Word documents; text is extracted for summaries and indexing
- **Other** — unknown types are treated as text when possible

Tip

Use descriptive filenames; they help title detection and retrieval.

8.3 How to Upload

1. Click **Upload** (or drag and drop) in the app
2. Submit and watch the progress indicator

8.4 What Happens Behind the Scenes

8.4.1 Title & Content Extraction

- **PDFs:** reads text; if a page is image only, OCR kicks in automatically
- **Images:** OCR extracts text; AI generates captions, objects, and tags to enrich search
- **Text/MD/CSV:** reads content directly (CSV preview/ingest limited to ~100 rows for performance)
- **EML:** extracts headers (From/To/Date/Subject) and a clean, link-safe body
- A smart title detector picks a concise title from the first part of the file (or from the filename)

8.4.2 Executive Summary

- An on-brand, structured summary (overview, highlights, figures, dates) is created automatically
- Stored as a dedicated summary entry and used to power quick answers

8.4.3 Search Indexing

- Keyword search (BM25) in your Documents library (fast text lookup)
- Semantic search (vectors) in your private Qdrant index for meaning-based retrieval
- Long files are chunked (with slight overlap) so answers can cite precise passages
- A special Title Slot vector improves recall for prompts like “what’s the project name?”

8.4.4 Safety & Cleanup

- Emails and images are normalized; invisible characters removed; links replaced with [link removed] in stored bodies
- This keeps search clean and prevents accidental clicking of live links inside stored text

8.5 Progress & Status

During upload you’ll see stages like:

- **Received → Reading / Extracting** (or **OCR, Vision** for images) → **Summarizing** → **Indexing** → **Done**
- The progress indicator moves to 100% when indexing finishes and the file is ready to use

If a very large or scan-heavy PDF seems slow, let it finish extraction/OCR. You can keep working elsewhere in the app.

8.6 Using Your Uploads

- **Ask About Database** (fast Q&A): “What clause mentions liquidated damages?”
- **Create Documents Mode** (polished briefs/memos with citations): “Create a strategy memo from my Goa market reports.”
- **Show Document**: open the full text + summary, copy Markdown, or pull quotes for your doc

8.7 Tips for Best Results

- Prefer native PDFs over photos; if scanning, use 300 DPI and good lighting
- Include numbers in the content if you’ll ask for IRR/ROI/MOIC later
- Keep CSVs lean; if you need deep table analytics, consider uploading an accompanying PDF summary
- For images, upload the clearest version; OCR quality directly affects search quality

8.8 Privacy & Control

- Uploading stores a copy for search inside your workspace only
- Links in stored text are shown as [link removed]; open originals for live links
- You retain control: remove items from your library when no longer needed (and ask support for account-level purges if required)

8.9 FAQs

Why don’t I see my summary yet? It’s generated right after text extraction. If the file is large/scanned, that step can take longer. Refresh the page or reopen the item.

Why are CSVs limited to ~100 rows? For speed. If you need more, split the CSV or upload a PDF/summary with key figures.

The image text looks messy. OCR quality depends on image clarity. Try a sharper image or higher resolution scan.

Do uploads change my files? No. We store a working copy and normalized text for search; your original remains unchanged.

Can I use uploads immediately in Create Documents? Yes — once status is **Done**, your files are available for both Ask About Database and Create Documents Mode.

8.10 Quick Start (Checklist)

1. Click **Upload** (or drag and drop) your PDF/image/text/CSV/EML
2. Add labels (optional)
3. Watch progress → **Done**

4. Click **Show Document** to review content + summary
5. Use **Ask About Database** for quick answers or **Create Documents** for briefs with citations

8.11 Why Larger Documents Can Take Longer

Large files take more time because several steps scale with size:

1. Text extraction & OCR

- PDFs with many pages or scans/images require per-page processing.
- Image-only pages are run through OCR, which is slower than reading native text.

2. Executive Summary generation

- After extraction, the system writes a structured summary.
- Very long documents can exceed safe size limits for a single pass, so the system may condense the draft and retry in a few quick passes until a clean, compact summary is produced.
- This keeps the summary faithful while fitting performance and storage constraints.

3. Chunking & semantic indexing

- The full text is split into overlapping chunks and each chunk is embedded for semantic search.
- More pages $\Rightarrow$ more chunks $\Rightarrow$ more embeddings to compute and store, which scales linearly with content size.

4. Network & rate limits

- Uploads involve several short server calls (progress updates, indexing).
- Very large or image-heavy files may take a bit longer depending on network conditions and temporary API throttling.

8.12 What you might notice in the UI

- The progress bar may spend longer on **Extracting / OCR** for scans and on **Summarizing** for very long docs.
- Indexing can run for a bit while chunks are embedded; once this completes, the item shows **Done** and is searchable.

8.13 Tips to speed things up

- Prefer native PDFs (not photos of pages).
- If possible, split extremely long documents into logical parts (e.g., Volume 1, Appendices).

9 Payment

This page is where you manage your subscription and usage credits to ensure uninterrupted access to NovusAI.

9.1 Understanding Your Subscription Status

Your account will be in one of three states:

- **Active:** Your subscription is current and you have available usage. You're all set!
- **Inactive:** Your subscription has ended or is not active. You will see an option to subscribe for \$35/month using the secure payment form.
- **Low Balance / Needs Top-Up:** Your organization has used all its available AI credits for the month. To restore access, you must add more credits using the top-up feature.

9.2 How to Top-Up Usage

If your account has a low balance, a top-up panel will appear.

1. **Select an Amount:** Choose a dollar amount from the dropdown menu (e.g., \$5, \$10).
2. **See Your Credits:** The interface will show you how many usage credits your selected dollar amount provides (for example, "\$1 gives 1000 credits").
3. **Top-Up:** Click the **Top up** button and complete the payment. Once the payment is successful, the credits are applied to your account immediately, and access is restored.

9.3 Notes & Tips

- Payments use a secure payment form and should complete within a few seconds in most cases.
- After topping up, your **Monthly Usage** and credits display will update automatically; you can also click **Refresh** to force an immediate UI update.
- If a top-up fails, verify your card details and network connection, then try again. If problems persist, contact support with the transaction details.

10 GDPR Compliance

This section explains how NovusAI is designed to meet the core requirements of the EU General Data Protection Regulation (GDPR). It describes the privacy-minded architecture, user controls, data handling practices, and the operational workflows that support data-subject rights and security. This is a product-level summary for users and administrators; for a complete legal assessment, consult your organization's Data Protection Officer (DPO) or legal counsel.

10.1 Overview

NovusAI treats uploaded content (PDFs, EMLs, images, text, CSVs, etc.), extracted text, and derived metadata as user data that must be protected and handled according to GDPR principles: lawfulness, fairness, transparency, purpose limitation, data minimization, accuracy, storage limitation, integrity and confidentiality, and accountability.

10.2 Lawful Basis & Purpose Limitation

- **Lawful bases:** Typical lawful bases for processing in NovusAI deployments are *performance of a contract* (when processing is necessary to deliver the service) and *legitimate interests* (e.g., improving workspace search and document generation). When consent is required (e.g., certain data-sharing integrations), the UI explicitly requests and records consent.
- **Purpose limitation:** Data is processed only for clearly-stated purposes such as ingestion, indexing, search, document generation (Create Documents Mode), and providing account features (Dashboard, File Storage, Ask About Database). We do not process data for unrelated secondary purposes without informing the data subject.

10.3 Data Subject Rights and How to Exercise Them

NovusAI implements mechanisms to enable the exercise of GDPR rights:

Access (Right of access): Users can view the files, extracted text, and summaries that NovusAI stores for their account (via File Storage and Show Document). Administrators may export account data in machine-readable form upon verified request.

Rectification (Right to rectification): Users can edit or replace uploaded files and metadata via the File Storage UI. For content-level corrections, re-upload or update the file and re-run ingestion to refresh extracted text and summaries.

Erasure (Right to be forgotten): The **Remove/Delete** actions in the UI remove NovusAI's stored copy and index entries. Deletion removes the database record and vector index entries so the file will no longer be searchable or used in RAG responses. Backups may persist for a limited retention window; see *Retention and Backups* below for restore/retention details and how to request permanent purging from backups and archives.

Restriction & Objection: Users can disconnect linked accounts (e.g., Gmail) and stop further ingestion. For additional restrictions (e.g., temporarily freezing processing for a

user), contact your Admin or Support team.

Portability: Users and Admins can export documents, summaries, and metadata in standard formats (Markdown, HTML, PDF, CSV) for transfer to another service.

How to submit requests: Provide a verified request through the application’s support flow or contact the organization Admin/DPO. Requests must be authenticated and contain identifying information sufficient to locate the account. Admins follow internal verification steps before fulfilling SARs or erasure requests.

Tip

When a user asks the application to “Remove” an email or file, that action removes NovusAI’s stored/indexed copy. It does not delete the original message from Gmail — this distinction is shown in the UI and should be explained during SAR/erasure handling.

10.4 Data Minimization & Retention

- **Minimization:** NovusAI stores only the artifacts necessary for search, retrieval, and document generation: extracted text, metadata (filename, size, dates), short summaries, and vector embeddings. Non-essential transient data (temporary OCR artifacts, raw intermediate processing buffers) are cleaned up after processing.
- **Retention policy:** Default retention and pruning policies are configurable by deployment. Typical configuration: weekly backups with automated pruning of oldest backups to maintain storage. Example locations: Qdrant backups saved under `/qdrant_backups` and SQL snapshots in the configured SQL backup location. Administrators may configure shorter retention windows depending on compliance needs.
- **Admin controls:** Admins can configure retention, backup frequency, and automatic deletion rules at the organization level to meet local/regulatory requirements.

10.5 Security Controls

NovusAI includes layered technical and organizational measures to ensure confidentiality and integrity:

Encryption

- **In transit:** All client–server communications should use TLS (HTTPS/WSS) to encrypt data while moving between user browsers and servers.
- **At rest:** Sensitive stored artifacts (database backups, vector stores, file blobs) should be encrypted at rest using disk- or object-store level encryption (e.g., filesystem encryption, cloud provider encryption keys). Deployers must enable encryption where applicable.

Access control & RBAC

- Role-based access control (Viewer, Editor, Admin) limits who can view, edit, export, or delete data. Admin actions that change roles or perform critical operations are

audited.

- Least-privilege principle is recommended for service accounts and operators.

Audit logging & Accountability

- Actions such as file uploads, deletions, role changes, backup/restore operations, and exports are logged with actor, timestamp, and context to support audits and investigations.
- Logs are stored securely, rotated, and made available to authorized admins for compliance checks.

Backups & Restore safety

- Backups are performed on a schedule (for example: weekly SQL snapshot and Qdrant backups). Backups are stored in secure locations and pruned per retention policy.
- Restore procedures require authenticated Admin actions and documented approvals to prevent accidental mass restores or reintroduction of data that was intentionally deleted.

10.6 Processing of Email Data and Third-Party APIs

- Gmail integration is performed via OAuth; tokens are scoped and stored per organization account. Users may disconnect Gmail at any time which stops further polling/ingestion.
- When data is fetched (email polling), NovusAI sanitizes and normalizes content (e.g., decodes quoted-printable, strips invisible characters, converts HTML to text, replaces live links with [link removed]) before storing to reduce accidental exposure of external links.
- Any third-party processors (e.g., cloud providers, managed Qdrant, payment processors) should be contracted under appropriate data processing agreements (DPAs) and subprocessors lists should be published by the deploying organization.

10.7 International Data Transfers

If user data is transferred outside the EEA, the deployment must rely on an appropriate transfer mechanism (e.g., adequacy decision, Standard Contractual Clauses, or approved derogations). Administrators should document the legal basis for cross-border transfers and ensure subprocessors comply with the same safeguards.

10.8 Processors, Subprocessors & Contracts

- The service operator (the deploying organization) acts as the data controller for account-level operations and must maintain contracts with subprocessors that process data (cloud providers, analytics providers, payment gateways).
- Maintain an up-to-date subprocessors list and ensure DPAs are in place. For sensitive deployments, prefer subprocessors that provide appropriate certifications (ISO 27001, SOC2, etc.).

10.9 Data Protection Impact Assessments (DPIA) & Risk Management

For high-risk use cases (e.g., processing of special categories of personal data, large-scale profiling, or sensitive employment/legal case material), a DPIA should be performed. The DPIA documents risks, mitigation measures (encryption, access controls, retention limits), and residual risk acceptance by the controller.

10.10 Automated Decision Making & Transparency

NovusAI provides retrieval-augmented outputs (briefs, summaries) that are generated from user data. Where automated outputs could materially affect individuals, controllers should:

- Provide clear transparency about the role of automated generation and which source documents were used (inline citations).
- Allow human review and modification of AI-generated outputs before they are used in decision-making.
- Offer mechanisms to contest or request review of automated outputs where applicable.

10.11 Incident Response & Breach Notification

- Maintain an incident response plan that includes detection, containment, assessment, notification, and remediation steps.
- In the event of a personal data breach affecting data subjects in the EEA, the controller must follow GDPR notification requirements (notify supervisory authority within 72 hours where feasible and notify affected data subjects when required by law).

10.12 Operational Recommendations for Controllers / Admins

- Configure retention settings and backup pruning to meet organizational policies and regional legal obligations.
- Minimize access to production data for developers; use sanitized or synthetic datasets for testing.
- Periodically review subprocessors and DPAs; keep records of processing activities (RoPA).
- Train admins and users on privacy controls (how to Remove data, how to disconnect Gmail, how to export data for SARs).