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USER GUIDE

Working with ARBI Docs

A practical guide to projects, documents, conversations and the rest of the matter-management platform — for lawyers, paralegals and matter teams.

WHO THIS GUIDE IS FOR

Anyone using ARBI Docs day-to-day: organising matter material, running document-grounded conversations, sharing with colleagues and external counsel, and keeping a verifiable record of the work.

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FOREWORD

About this guide

What you'll find inside, how it's organised, and how to read the conventions used throughout.

ARBI Docs is a matter-management platform for legal teams. This guide walks you through everything you can do in the interface — from organising documents in a project, to asking a question grounded in those documents, to sharing the result safely with a colleague or external counsel.

How the guide is organised

The guide is grouped into Parts that match the major sections of the interface. Each Part has short chapters that focus on one task at a time. You can read straight through, or jump to the chapter you need via the table of contents on the next page.

Part 1 · Getting Started
Logging in, finding your way around, switching between workspaces and projects.

Part 2 · Workspaces & Projects
How firms and matters are structured — workspaces, projects, members, settings.

Part 3 · Documents
Uploading, organising, viewing, annotating, translating, summarising and exporting documents.

Part 4 · Conversations
Asking questions about your matter, citing sources, branching threads, choosing AI models.

Part 5 · Search & Contacts
Finding documents and people, encrypted direct messages, the contacts directory.

Part 6 · Settings & Sharing
User and workspace settings, the sharing & permissions model, login and security.

Conventions used in this guide

- Like this — a button, menu item or control in the ARBI Docs interface.
- Primary action — a primary action button (the most prominent control in a screen).
- `Ctrl` + `K` — a keyboard shortcut.
- `identifier` — a literal value (e.g. an ID, a flag, a URL).

NOTE Some features described here may not be available in every deployment — your firm administrator decides which capabilities are enabled. Where this matters, the chapter says so.

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APPENDICES

PART 1

Getting Started

Your first ten minutes in ARBI Docs — signing in, finding your way around the dashboard, and moving between workspaces and projects.

1.1 Signing in

ARBI Docs supports two ways to sign in: an email and master password, or single sign-on. Your firm administrator decides which is available.

Email and master password

Open the sign-in page and enter the email address registered with your firm and your master password. Click **Sign in**. ARBI Docs derives an encryption keypair from your password locally — the password itself is never sent to or stored on the server, which is why we call it a *master password* rather than just a password.

Single sign-on

If your firm uses single sign-on, click **Sign in with SSO** instead. You'll be redirected to your identity provider, sign in there as normal, and return to ARBI Docs once you're authenticated. Some deployments are configured for SSO-only and skip the password screen entirely.

NOTE The first time you sign in with SSO you will be asked to set a master password. This master password is what encrypts your content — it is independent of your SSO login and cannot be recovered without your recovery key.

First-time registration

If you've been invited by a colleague, the invitation email contains a three-word code. On the sign-in page choose **Create account**, enter your email and the three-word code, then pick a master password. ARBI Docs immediately generates a **recovery key** — download and store it somewhere safe before continuing.

IMPORTANT Your recovery key is the only way back into your account if you forget your master password. ARBI never sees your password and cannot reset it. Treat the recovery key file like you would a master key to a deeds room.

Forgot your password

From the sign-in page click **Forgot your password?**, then drop in the recovery key file you downloaded at registration. ARBI will sign you in and immediately prompt you to set a new master password. All your workspace keys and messages are re-encrypted in the background as part of the change — you don't need to do anything.

1.2 The dashboard

Three regions: the sidebar on the left, the main pane in the middle, and a floating panel on the right for projects and notifications.

The sidebar (left)

The sidebar is your primary navigation. At the top sits the **workspace card** — an icon and the workspace name — which doubles as the workspace switcher. Below that, you'll find the lists for the workspace you're currently in: conversations, documents, search, contacts, and any tags you've defined.

The sidebar can be collapsed to give the main pane more room — useful when reading a long document or following a long answer. Your user profile and a small connection indicator live at the bottom.

The main pane (centre)

The main pane is where the work happens. It changes depending on what you've selected: the document grid when you're looking at **Documents**, the chat thread when you're inside a **Conversation**, the search results page when you've run a query, and so on. Most main-pane screens support multiple tabs side-by-side, so you can have a conversation open next to the document it's citing.

The floating panel (right)

The panel on the right is global — it follows you across workspaces. It hosts the **Projects** tab (where you manage billing and quotas) and the **Contacts** tab (where direct messages live). You can open and close it freely; it remembers its state per browser tab.

The home view

Whenever you don't have a specific workspace selected, the main pane shows the **home view** — a grid of all the workspaces you have access to, grouped by project. From here you can jump straight into a workspace, see at a glance which projects you're a member of, and open workspace settings for the ones you own.

> **TIP** If a screen looks crowded, try the `[` shortcut to collapse the sidebar, or close the right panel by clicking its header. Most layout choices stick per tab, so you can keep different layouts open in different browser tabs.

1.3 Switching workspaces and projects

Workspaces are matter-shaped containers; projects are billing containers that group workspaces together. You'll usually switch between workspaces; you'll only occasionally need to switch projects.

Switching workspaces

Click the workspace card at the top of the sidebar. You'll see the home view with all the workspaces you can access, grouped by project, each as a tile with document and conversation counts. Click a tile to open it.

ARBI Docs remembers your last workspace *per browser tab*, not per account. That means you can open one matter in one tab and a different matter in another, side by side, without either disturbing the other.

Workspace types

A small badge on each workspace tile tells you what type it is:

Individual
A workspace with just you in it — useful for personal triage and drafting before sharing.

Group
A workspace with more than one member — the normal shape of a matter team.

Common
A workspace that is visible to everyone in your firm (your admin can enable this for shared resource libraries).

Switching projects

You only need to switch projects when you're managing billing or quotas, not when you're doing matter work. Open the **Projects** tab in the floating panel on the right. Each row is a project you own or are a member of, with its plan, AI credits usage, storage usage and collaborator count.

If you're an owner, clicking a project opens a detail view where you can change packs, set a daily AI-credit cap per user, view past invoices, and download a usage breakdown by workspace, person and feature. Members see the same project list but with billing details blanked out.

PART 2

Workspaces & Projects

The two containers behind everything in ARBI Docs. Workspaces hold matter material; projects hold the subscription. Both are simple — once you see how they fit together.

2.1 What a workspace is

A workspace is the matter-shaped container for everything you do in ARBI Docs — documents, conversations, tags, and the people who can see them.

The unit of confidentiality

Every workspace has its own encryption key. Documents and conversations live inside that workspace and are only visible to people you've invited as members. When you change your password, the workspace keys you hold are re-wrapped automatically — your colleagues' access is unaffected.

In practice a workspace usually maps to a single matter: one case, one transaction, one investigation. Some teams use a workspace per client and use folders within it to separate matters. Either pattern works; the platform doesn't impose one.

Personal vs. shared workspaces

Every user has a **personal workspace**, created automatically when you register. Use it for early-stage drafting, triage and exploratory work before you bring a matter team in. Personal workspaces cannot be deleted.

Beyond your personal one, you can create as many **shared workspaces** as your project quotas allow. These are the ones you invite colleagues into.

Creating a workspace

1. From the home view click New workspace.
2. Give it a name (up to 50 characters) and an optional description.
3. Choose the project it should bill against — if you only have one project, it's already selected.
4. Click Create. You'll be dropped straight into the new workspace, ready to upload your first documents.

> **TIP** Name a workspace the way you'd label a paper file: the matter name, the client, and the year. The name is what your colleagues will see in their sidebar — and what you'll see across browser tabs.

2.2 Members and roles

Three roles cover the spectrum from full control to read-only access. You invite by email and can change roles or remove members at any time.

The three roles

Owner

Full control of the workspace. Can invite and remove members, change roles, edit settings, and delete the workspace. Every workspace has at least one owner — usually the person who created it.

Collaborator

The standard matter-team role. Can upload documents, run conversations, create tags, and share work within the workspace. Cannot manage membership.

Guest

Read access to shared documents and conversations. Useful for senior partners who want visibility without editing rights, or for external counsel given a scoped view.

Inviting members

1. Open the workspace and go to Settings → Members.
2. Click Add members and paste one or more email addresses (commas, spaces or new lines all work; up to 50 at once).
3. Pick the role they should join with — this is the same for everyone in this batch. You can change individual roles afterwards.
4. Click Send invitations.

If the person already has an ARBI Docs account, they're added immediately and will see the workspace next time they sign in. If they don't yet, they receive an invitation email with a three-word code and a link to register.

Changing roles and removing members

From the members list, click the role badge on any row to open the role picker. Owners can promote and demote anyone except themselves — to step down as the sole owner you need to make someone else an owner first. To remove a member, click the trash icon at the end of their row. Every workspace must always have at least one owner.

2.3 Workspace settings

Workspace settings are deliberately short. The name, the description, the members, the project it bills against, and a single delete button.

What you can change

Click the workspace card in the sidebar and choose **Workspace settings**. You'll see:

- **Name** — up to 50 characters. Saved as soon as you tab away.
- **Description** — optional, longer text for context. Also saves on blur.
- **Project** — the project this workspace bills against. Changing it moves billing for any future usage to the new project.
- **Members** — invite, remove and change roles as described in §2.2.

Read-only stats

Below the editable fields, the settings page shows useful facts about the workspace: shared and private document counts, conversation counts, storage used in MB, and the embedded member list. These are read-only and update in real time.

Deleting a workspace

Only an owner can delete a workspace, and you can't delete the workspace you're currently inside — switch to another one first. From the home view, open **Workspace settings** on the tile and use the **Delete workspace** button at the bottom of the page. Deletion is irreversible: all documents, conversations and tags in that workspace go with it.

> **IMPORTANT** Before deleting a workspace, consider exporting its documents (see §3.7) — there is no undo. Personal workspaces cannot be deleted.

2.4 Creating a project

A project is a billing container. It pools storage, AI credits and collaborator seats across all of its workspaces. Most firms set up one project per matter or one shared project for the whole team.

Why a separate billing container?

Workspaces are the right shape for confidentiality (one matter team, one workspace) but the wrong shape for billing — you'd end up with many small invoices. A project lets several workspaces share a single subscription, with usage rolling up to one bill, while keeping each workspace's content fully isolated.

Creating a project

1. Open the **Projects** tab in the floating panel on the right.
2. Click **+ New project**.
3. Enter a name — usually the firm name or, for matter-level billing, the client and matter reference.
4. Choose the number of **packs** you want. Each pack includes a fixed allowance of AI credits, document storage, and collaborator seats — see Part 6.5 or the pricing page on arbi.city for current amounts. Toggle **Annual** for a discounted rate.
5. If you have one, enter a promo code.
6. Click **Subscribe** to go through to checkout. Your project is created the moment payment confirms.

Free starter projects

If your deployment supports it, you can create a project on the free Starter tier — no card needed. Starter projects work, but with no AI credits, minimal storage and a single collaborator slot. Upgrade at any time from the project's detail view.

> **TIP** If you've just completed checkout and don't see your new packs yet, give it a few seconds. ARBI Docs will refresh the project state automatically once Stripe confirms the payment — you don't need to reload.

2.5 The project list

Open Projects in the right-hand panel to see every project you own or are a member of, with current usage at a glance.

What the list shows

Each row is one project. The columns:

- **Project name** — click to edit inline, or double-click for the full detail view.
- **Plan** — Active, Past due, Starter, Cancelling, or Dev. The plan determines what quotas apply.
- **AI credits** — used and limit for the current billing period (resets monthly).
- **Storage** — GB used and the GB limit purchased.
- **Collaborators** — number of unique members across all of the project's workspaces, and the seat cap.
- **Your daily cap** — the per-user, per-day AI credit limit, if the owner has set one.

Projects you don't own

Projects where you are a member but not the owner show up in the list too — billing details are blanked out. You'll see the project name and plan, but quotas, invoices and per-user caps are owner-only.

Inline actions

The end of each row has a small actions menu: rename, manage subscription (opens the Stripe customer portal), view invoices, and — for empty projects with no subscription — delete.

> **NOTE** You can't delete a project that has workspaces assigned to it or an active subscription. Move the workspaces to another project first (§2.3), then cancel the subscription, then delete.

2.6 Project settings

Open the project detail view to change plans, set per-user spending caps, and see exactly where your AI credits are going.

Plan and packs

The top section shows the current plan, the number of packs purchased, and current usage. Click **Change plan** to add or remove packs — you'll be taken to the Stripe customer portal to confirm. Annual subscribers see the renewal date; monthly subscribers see the next billing date.

Per-user daily cap

By default, every member of the project shares the project's monthly AI credit pool with no individual limit. If you'd like to keep one user from accidentally spending the whole pool, set a **daily cap per user**: the number of credits any one non-owner can spend in a day. Leave it blank for no limit.

> **TIP** The daily cap only applies to non-owners. As the project owner, you can always spend up to the project's monthly quota — useful when you're the one running an overnight batch annotation job.

Usage breakdown

Below the plan section you'll find a detailed usage view that you can slice three ways:

- **By day** — what was spent on each day of the current billing period.
- **By workspace** — which workspaces are doing the most work.
- **By model group** — Fast, Wise and Premium models broken out separately, with per-model detail so you can see exactly which model was used and why it cost what it did.
- **By user** — useful when you need to attribute costs back to a particular matter team.

Invoices

Past invoices appear at the bottom of the page with download links. They're authoritative PDF copies pulled directly from Stripe, so they match what your accounts team will see.

PART 3

Documents

From upload through parsing, viewing, annotating, translating, comparing and exporting. The Documents area is the documentary record of the matter.

3.1 Uploading documents

Drag and drop, paste a URL, or pick a folder. ARBI Docs parses, encrypts and indexes everything in the background — you can keep working while it happens.

What you can upload

PDFs (born-digital or scanned), Microsoft Word and Excel documents, plain text, HTML, Markdown, emails (.eml and .msg), and the common image, audio and video formats. ZIPs and other archives are stored but not parsed — you can download them as originals but you can't view or cite into them.

How to upload

1. Open the workspace's **Documents** view and click **Upload**, or drag files straight onto the document grid.
2. For bulk uploads, drag a whole folder — ARBI Docs preserves the folder structure so you can keep your e-discovery hierarchy intact.
3. You can also paste URLs to ingest web pages directly.
4. Optionally expand **Upload settings** to skip duplicates, auto-rename files using an AI instruction, or attach AI annotation tags so the file is annotated as soon as it's indexed.
5. Click **Start upload**. The Status tab shows progress for every file in flight.

What happens after upload

Each file moves through five stages: **queued**, **parsing** (text extraction, OCR for scanned documents), **encrypting** (the file is encrypted at rest with the workspace key), **indexing** (chunked into passages for citation and search), and finally **analysing** if you've asked for AI annotations. The status column on the document grid shows you where each file is. Documents become searchable from *indexing* onwards; the original file is downloadable from the moment it's uploaded.

> **NOTE** Files are encrypted on your device before they leave it, using a key derived from your workspace key. ARBI Docs never sees the unencrypted bytes server-side. If a file fails to parse (corrupt PDF, password-protected, etc.) it stays in the workspace with a **Failed** badge — you can still download the original, but it isn't indexed or searchable.

3.2 Organising and filtering

The document grid behaves like a spreadsheet: sortable columns, multi-select, bulk actions. Filters live at the top; tags do the heavy lifting for cross-cutting categories.

Folders vs. tags

Use **folders** for hierarchy: a single canonical place each document lives. Folders are usually derived from how you uploaded — drag a folder in and you get the same structure inside ARBI Docs. Use **tags** for cross-cutting categories: privileged, key evidence, draft, signed, by counterparty, by issue. A document lives in exactly one folder but can carry any number of tags.

Filters in the toolbar

Above the grid you'll find a row of quick filters. The common ones:

- **Folder** — a tree picker; choose one branch to scope the grid.
- **Shared / Private** — show only documents visible to all workspace members, or only your private ones.
- **In current chat** — show only documents already attached to the conversation you're currently in.
- **Uploaded by me**, **Updated last week**, **Duplicates**, **Parent / child** — fast slices of common queries.
- **Indexing complete / in progress / failed** — quickly find anything that needs attention.
- Any tag you've created appears here as a one-click filter.

Views

Two main views, both showing the same data:

Grid view

The default — a sortable, multi-select table. Best for browsing, bulk operations and exporting.

Card / Review view

One document at a time, with metadata, related documents and chunks ready to annotate. Best for focused work on a single file.

Bulk operations

Select multiple rows (shift-click for ranges, ⌘/Ctrl-click for individual rows) and a toolbar appears. From here you can apply tags in bulk, move documents to a folder, generate AI annotations, export, or delete.

3.3 The Document Viewer

Click any document to open the viewer. The same surface handles PDFs, Word, Excel, images, audio, video and parsed markdown — you switch between them with the tabs at the top.

The tabs at the top

Each tab is a different way of looking at the same document. Not every tab is available for every file — Word documents don't have a PDF tab, for example.

- **PDF** — the original document rendered with selectable text and page navigation. The default for PDFs, scanned files and images.
- **HTML** — the parsed markdown view. This is what ARBI uses internally for citations and AI analysis. Cleaner to read than the PDF for long contracts and policy documents.
- **DOCX** — the original Word document, with any track changes preserved.
- **XLSX** — the original Excel file with table rendering.
- **Edit** — for ARBI-generated artifacts (Markdown documents written in chat), a full editor with version history.
- **Versions** — the parent-child version chain if this document supersedes or is superseded by other versions.

Page navigation

For PDFs and Word documents, use the page input at the top of the viewer to jump to a specific page, the previous/next arrows for paging, or just scroll. Page numbers persist across tabs — switch from PDF to HTML and you land on the same content.

The chunks panel

The right side of the viewer reveals a **chunks panel** whenever you click on a passage. A chunk is the smallest unit ARBI Docs indexes — typically a few sentences or a paragraph, plus tables and figures. The chunks panel lists every chunk on the current page, with the active one highlighted and any tags or notes attached to it visible inline.

> **TIP** When an AI response cites a chunk (see §3.6), the viewer opens directly to the chunk with a yellow highlight. You can read the surrounding context, verify the answer, and click back to the conversation when you're satisfied.

Comparing & versioning

The viewer can show two documents side by side as a redline, and can walk you through a chain of versions of the same drafting work.

Redline comparison

From the HTML tab, click the **Compare** button (two arrows facing left/right). Pick the document to compare against, and ARBI Docs computes a word-level diff between the two parsed texts. Deletions are shown in red strike-through, insertions in blue. Headings, lists, tables and other markdown structure are preserved on both sides.

The flip button swaps which document is the base and which is the comparator — useful when you want to read a redline as "what changed from the previous draft" rather than "what was removed".

Versions

ARBI Docs tracks parent-child relationships between documents that supersede each other. Open the **Versions** tab to see the version timeline — the document you're looking at is highlighted in the chain. From any prior version, click **Compare to current** for an immediate redline against the latest, or **Open** to inspect the prior version in full.

Side-by-side translation

When you translate a document (§3.5), the result opens in HTML view with the original on the left and the translation on the right, paragraph-aligned. This is also how the translation gets stored — it stays available to view, cite, or export as a fresh document.

> **NOTE** The redline view works from parsed text, not the original file's formatting. For contracts and other text-heavy documents this gives a much cleaner diff than a Word-level track changes review. If you need a Word-formatting diff for a court filing, export both versions (§3.7) and use Word's built-in Compare Documents feature.

3.4 Annotations

Tag documents — or specific passages — with information that matters to your matter. Notes attach to the tags. Citations attach to the notes. Everything stays linked to the source.

Tags, the building block

A **tag** is a label you've defined in the workspace, with a type: a checkbox (yes/no), a text field, a number, a single-select dropdown, a date, or a search query. You create tags once and then apply them to as many documents — or chunks — as you need.

Applying tags at the document level

From the document grid, multi-select rows and use the `Tag` button in the toolbar to bulk-apply. From the viewer, the right panel shows every tag available in the workspace — toggle the ones that apply to the current document. Each tag application can carry an optional **note** for your commentary.

Chunk-level annotations

Click a passage in the viewer to open the chunks panel, then apply tags to that specific chunk. Use this when "the document mentions a non-compete" is less useful than "the non-compete clause is right here, on this paragraph, on this page".

AI-generated annotations

Tags with an **instruction** attached are AI-capable. When you apply such a tag to a document — either at upload, or later in bulk — ARBI Docs runs the instruction against the document and writes the resulting value into the tag, along with citations back to the passages it relied on. Examples: "What is the governing law of this contract?", "Is there a non-compete? If yes, for how long?", "Summarise this email in one sentence." The user can edit the answer afterwards.

> **TIP** If you find yourself asking the same question across hundreds of documents, define it as a tag with an instruction once and let the AI populate it in batch. Every answer comes with citations you can verify, and the tag becomes a sortable column in the grid.

3.5 Translation, Summarise, Chronology

Three single-click actions that turn a document — or a set of them — into something more useful. All three run as conversations behind the scenes, so the result is always citable.

Translate

Open the document and choose **Translate**. Pick a target language from the dropdown (thirteen common languages are preset; you can type any other) and click **Start**. ARBI Docs reads the full document, generates a side-by-side translation with the original on the left and the translation on the right, and saves it as a new document in the workspace.

Summarise

Choose **Summarise** on a document and pick a length: **Brief** (one paragraph, core message and key conclusions), **Standard** (overview, key points, conclusions) or **Detailed** (full structured breakdown including background, evidence and open questions). The summary appears in a new conversation where you can continue to ask follow-ups about the document.

Chronology

Select two or more documents — emails, statements, contracts, anything dated — and click **Chronology**. ARBI Docs extracts every dated event it can find across the selection and renders them as a single ordered timeline. You can click any event to jump to the source passage in the underlying document.

When Translate works best

Long documents in languages you don't read. Keep the side-by-side view open while you work — much faster than translating, then losing the original.

When Summarise works best

Triage. Quickly decide whether a 200-page bundle deserves close reading, and where in it to start.

When Chronology works best

Reconstructing what happened when. Especially useful across email threads, statements and meeting notes where the chronological narrative isn't already obvious.

All three are conversations

Every result is a conversation, which means it carries citations, it can be branched, and it can be shared with the matter team like any other thread.

3.6 Find similar & citations

Two related features that let you move from one document to others that resemble it, and from a claim back to the passages that ground it.

Related documents

The `Related` column on the document grid shows, for each document, a small badge with a tier and a count. The tiers, in order of strength:

- **Duplicates** — exact byte-for-byte matches. Useful for de-duplicating bulk imports.
- **Similar** — near-duplicates, above a high similarity threshold. Different versions of the same draft, slight variants of a template, the same document with different metadata.
- **Family** — explicit parent / child relationships, including versions and email attachments.

Click the badge to expand the list of related documents and jump straight to them.

Citations from chat

When ARBI Docs answers a question (Part 4) the answer is decorated with superscript citation badges — *[1]*, *[2]*, and so on. Hover any badge and you'll see the cited passage in a popover, with the document name, page number, and any neighbouring passages that support the same statement.

Click the badge and the viewer opens to the cited passage with a yellow highlight. From there you can read the surrounding context, navigate to other citations in the same answer, or use the chunks panel to look at adjacent passages.

> **TIP** Verifying citations is the single most important habit in working with AI-drafted content. Every claim worth using is a claim worth clicking through. If a citation doesn't actually support what the answer says, edit the message and ask again — the model is much more accurate when challenged on its own evidence.

3.7 Exporting documents

Two export modes: download to your computer as a ZIP, or copy into another workspace. Both preserve original files bit-for-bit and optionally include metadata.

Download to your computer

Select the documents to export (or none, to export the whole workspace) and click **Export** → **Download**. You get a ZIP with the original files in their folder structure, plus an optional metadata CSV. The CSV columns can be:

- **Visible columns** — exactly what you see in the grid right now, including any tag columns you've added.
- **All columns** — every standard field plus every tag in the workspace.
- **Files only** — no metadata CSV. Useful when you're handing originals to someone who doesn't need the ARBI-specific fields.

Originals are exported bit-for-bit — the file you get out is the same file you put in.

Copy to another workspace

To move documents to a different matter or to share them with a different team, choose **Export** → **Copy to workspace**. Pick the target workspace from the list (only ones you're a member of are shown) and confirm. ARBI Docs re-encrypts the documents under the target workspace's key so the receiving team can immediately read them.

> **NOTE** Copy to workspace preserves the documents but does *not* carry across annotations or tags from the source workspace — tags are workspace-specific. If you need annotations in the new workspace, recreate the tags there and re-apply, or use the AI annotation feature (§3.4) to regenerate them from scratch.

Bulk export from the grid

Both export modes work with any selection — one document, a hundred, or the entire workspace. For very large exports the ZIP is generated server-side and you'll receive a notification when it's ready to download.

PART 4

Conversations

Where most day-to-day work happens. A conversation is a chat thread bound to a workspace, grounded in the documents you've put in scope, with every claim citable back to source.

4.1 Starting a conversation

Conversations live inside a workspace. Each one is a thread you can return to, branch, share with the matter team, and cite from.

A new conversation

From the **Conversations** view in the sidebar, click **New conversation**. You'll land on an empty chat tab with a single text input at the bottom and the rest of the screen waiting for content. Conversations don't need a title up front — ARBI Docs will name them for you based on what you ask first, and you can rename later in settings.

The conversation list

The conversation list shows every conversation in the current workspace, newest first. Each row has the title, the creator, when it was created, whether it has been shared, and a small status indicator if the latest answer is still being generated. You can rename, delete or share any conversation you created; you can read any conversation that has been shared with the workspace.

Picking up where you left off

Re-opening a conversation puts you back exactly where you were — the same scroll position, the same selected branch, the same documents attached. You can carry on the thread, or branch off to ask the same question a different way (§4.5).

> **TIP** Don't be precious about conversations. They're cheap to create and easy to delete. If a conversation is wandering off topic, start a fresh one and pull in just the documents you need this time. Long, multi-topic threads tend to confuse the model and dilute the citations.

When a conversation is shared

Sharing a conversation makes it visible to every member of the workspace. Anyone with access can read the thread, but only the creator can rename or delete it. Sharing is one-way — once shared, a conversation stays shared.

4.2 Adding context documents

Conversations are grounded in documents. Attach the ones the AI should consider — by drag-and-drop, multi-select from the workspace, or pinning a single primary file.

The documents button

At the bottom of the chat, next to the input box, you'll see a paperclip icon with a count next to it. That's the **documents button** — the count is how many documents are currently in scope for this conversation. Click it to open the documents picker.

Adding documents

1. Click the documents button. The picker shows all documents in the current workspace.
2. Use the search box, folder filter or tag filters to find what you want — they work the same way as the main Documents grid.
3. Tick the rows you want to add and click Add to conversation.

You can also drag documents straight from the Documents view onto a conversation tab — they're added immediately, no picker needed.

Pinning a primary document

For conversations focused on a single document — translating it, redlining it, asking detailed questions about it — pin it. Right-click the document in the picker and choose Pin. The pinned document's title appears next to the documents count and gets priority in the AI's reasoning. A small pin badge on the icon reminds you that one is pinned.

Auto-included documents

When you open a workspace that has a **document scope** rule (set in workspace settings), matching documents are auto-added to every new conversation. You can remove auto-included documents at any time from the picker — they only auto-include on conversation creation, not on every message.

NOTE Documents still being processed (queued, parsing, indexing) show a small clock icon in the picker. You can select them — they're added to the conversation and become live as soon as indexing finishes. Failed documents can't be added until you re-upload or fix the underlying file.

4.3 Asking questions and reading answers

Type a question, press Enter. Answers stream in token by token, with citations attached. The status bar at the top of each answer tells you what's happening behind the scenes.

The input area

The text input at the bottom of the conversation grows as you type. Press `Enter` to send; `Shift` + `Enter` inserts a new line. Above the input you'll see the documents button (§4.2) and the model selector (§4.8). When the model is generating, the send button becomes a stop button — click it to interrupt.

How answers come in

Answers stream from left to right, sentence by sentence. While streaming, a status bar at the top of the message shows what's happening: **Thinking…** for reasoning models, **Reading documents** when chunks are being retrieved, **Generating response** when text is being written, and an elapsed-time counter throughout. When the answer is done you'll see **Answered in 2.5s** or similar.

Editing a question

Hover any user message and a small pencil icon appears. Click it to edit the question. Sending the edited question creates a **branch** — see §4.5 — so the original thread is preserved and you can compare the two answers.

When generation fails

If the connection drops or the model returns an error, the assistant message shows a small alert: *Message lost. Click to retry.* Click it to re-send the same prompt with the same documents. If the connection has dropped entirely, you'll see the indicator at the bottom of the sidebar; reconnect happens automatically the next time the network is available.

> **TIP** Treat the first answer as a draft. Read the citations, then ask follow-ups: "Is that consistent with clause 8.2?" "What about the schedule on page 30?" The model gets sharper the more specific the questions become.

4.4 Citations and jump-to-source

Every claim worth using is a claim worth verifying. Citations are how you do that — one click from the answer to the passage that grounds it.

Inline citation badges

Citations appear inline in the answer as small superscript numbers — *[1]*, *[2]*, etc. — with a faint yellow highlight on the words they support. Each badge corresponds to one or more passages in the documents in scope. Multiple badges can sit next to the same sentence; multiple sentences can share the same badge.

Hovering

Hover a citation badge to open a popover that shows the cited passage with the document name and page number. If the same statement is supported by multiple passages, small arrows let you flip through them without leaving the conversation.

Clicking through

Click a badge — the viewer opens to the cited document, scrolled to the cited chunk, with a persistent yellow highlight. From there you can:

- Read the surrounding context to confirm the answer is well-founded.
- Apply a chunk-level annotation (§3.4) to flag it for later.
- Use **Find similar** to see other passages making the same point.
- Switch back to the conversation tab to keep reading the answer.

IMPORTANT AI models occasionally cite a passage that doesn't quite say what the answer claims. That's exactly what citations are designed to catch. If a citation looks off, edit your question to challenge it — "The answer says X, but citation [2] is about Y. Re-answer using only the documents in scope" — and the model will usually correct itself, or admit it doesn't know.

4.5 Branches

When you edit a question, ARBI Docs doesn't throw the old answer away — it creates a new branch from the same point. You can flip between branches and compare answers side by side.

Why branch

Branching is the right move when you want to try a different prompt, a different model, or a different set of documents without losing the answer you already have. Common cases:

- Rephrasing a question that the model misunderstood.
- Asking the same question with a stricter set of source documents to see if the citations change.
- Trying a Premium model on a question your default model couldn't answer well.

Creating a branch

Hover any user message and click the pencil icon. Edit the prompt — change the wording, change the model, change the attached documents — and send. The original branch is preserved; a new branch is created from the same starting point.

Navigating branches

Wherever a branch exists, you'll see a small branch indicator between messages: *1 of 2*, *2 of 3*, etc., with arrow buttons either side. Click the arrows to flip between branches. The rest of the conversation below the branch point updates to show whichever branch you're now on.

The branch tree

For conversations with many branches, open the thread visualiser from the conversation's actions menu. It shows the full branch tree as a graph — click any node to jump straight to that point in the thread.

> **TIP** Branches are also a good way to A/B test prompts. Run the same question with Standard and Premium models in parallel branches, compare the answers, and keep whichever you trust more.

4.6 Agentic mode

For multi-step questions — read these documents, find this thing, then summarise — ARBI Docs can plan the work, call tools to gather what it needs, and assemble the answer. That's agentic mode.

What changes

In agentic mode the assistant doesn't just answer immediately. It first plans the work: which documents to read, what to look for in them, whether to run a search, whether to draft an artifact. It then executes that plan one step at a time, showing you each step as it goes.

Turning it on

Select **Autoselect** in the model selector at the bottom of the conversation. ARBI Docs picks the right model for the question and turns on agentic mode automatically. You can also switch into agentic mode mid-conversation: open the conversation settings (§4.9) and toggle `Agentic by default`.

Reading agent steps

While the agent is working, the message expands to show a **steps panel**. Each step lists the tool used, the parameters, and a short summary of what came back. For example: *Reading document Contract-A.pdf (42 pages)*, *Searching workspace for "non-compete"*, *Drafting summary*. You can collapse the panel any time, or expand a step to see the full tool input and output.

When to use it, when not to

Use agentic mode for

Multi-document questions, "find me X across the matter" requests, anything that needs a search before it can be answered, anything that needs to draft an artifact.

Skip it for

Short questions about a single, already-attached document. Direct mode is faster, cheaper and just as accurate.

NOTE Agentic mode uses more AI credits than direct mode because it makes multiple model calls. The cost is shown in the project's usage breakdown by feature (§2.6).

4.7 Built-in skills

Skills are reusable prompts and procedures. Some come built in — Chronology, Summarise, Translate, Redline. Others you create yourself, stored as workspace documents.

Where to find them

On a new conversation you'll see a row of skill cards under the input — one per skill available in this workspace. Click a card to load its prompt into the input box, where you can edit it before sending. The skill takes care of any non-obvious wiring: which documents to read, which model to use, how to format the answer.

Skills that ship with ARBI Docs

Chronology

Builds a date-ordered timeline from the attached documents. Best with emails, statements, and meeting notes.

Summarise

Brief, standard or detailed summary of one or more documents. Output is fully cited.

Translate

Side-by-side translation of a long document into any target language.

Redline

Compare two versions and produce a clean redline you can paste into a brief.

Your own skills

If your firm has built custom skills — a particular kind of clause checklist, a specific style of memo, a research procedure — they appear in the same row of cards. They're stored as workspace documents with a *Skill* work-product type, so they're versioned, shareable, and improvable by anyone with edit rights.

Invoking a skill by name

You can also type `/skill-name` at the start of a message to invoke a skill directly — useful if you've memorised the ones you use most often, or if you want to chain a skill into a longer prompt without leaving the keyboard.

4.8 Choosing an AI model

ARBI Docs lets you pick the model that fits the question. Standard models are ARBI-hosted and used by default; Premium models are pass-through to OpenAI, Anthropic or Google.

The model selector

The compact pill at the bottom of the conversation, next to the input box, shows which model will answer your next message. Click it to open the picker.

Three tiers

Autoselect

ARBI Docs picks the best model for the question. Enables agentic mode (§4.6) when the question is multi-step. The right default for most users.

Standard

ARBI-hosted open models, running on infrastructure inside ARBI's perimeter. Fast, private, and your firm's data never leaves ARBI.

Premium

Pass-through to a third-party provider (OpenAI, Anthropic, Google). Use when a specific model's reasoning is worth the credits — drafting, long-form analysis, expert-level synthesis. Charged at pass-through token rates.

Reading the price

Hover any Premium model to see its credit cost per million input and output tokens. Standard models and Autoselect don't show a price — they're included in your project's monthly AI credit allowance. Premium models bill in addition, against the same monthly cap.

Setting a default

The model you pick applies to the rest of the current conversation. To change your default across all new conversations, open **User settings** → **Preferences** → **Conversation** and select your preferred Premium model. The default applies only when you toggle **Enable Premium models** on.

> **NOTE** When you select a Premium model, the model's data-handling terms apply in addition to ARBI's. Check your firm's policy on which third-party providers are approved for which categories of matter material before switching to Premium for confidential work.

4.9 Conversation settings

Per-thread overrides for sharing, model, and a few other defaults. Most users never need to touch this — the workspace defaults are usually right.

Where it lives

Click the gear icon at the top of any conversation tab, or pick **Settings** from the conversation's actions menu in the list view.

Title and rename

The title is what colleagues see in the conversation list, and what you'll see in tab labels. ARBI Docs auto-names a conversation based on its first message, but you can rename it any time — up to 60 characters.

Sharing

Click **Share with workspace** to make the conversation visible to every member of the workspace. They'll see it in their conversation list and can read every message and citation. Only you, as creator, can continue editing the title; everyone else has read access to the existing thread but cannot add new messages.

> **IMPORTANT** Sharing is one-way. Once a conversation is shared with the workspace, it cannot be unshared. If you need a private working space, start a fresh conversation and don't share that one.

Model overrides

You can lock a specific model — and its agentic behaviour — for this conversation. Click **Use defaults** at any time to revert to the workspace-wide preference.

Deletion

Only the creator can delete a conversation. Deletion is irreversible — but, because everything in ARBI Docs is grounded in the workspace's documents (which stay where they are), deleting a conversation removes the thread without affecting any of the underlying material.

PART 5

Search & Contacts

Finding the passage you need across a workspace of documents, and finding — and securely messaging — the people you need across firms.

5.1 SmartSearch

SmartSearch combines semantic and keyword search across every document in a workspace. Type a natural-language question, pin terms in quotes for exact matching, and read the passages it returns.

Three search modes

Hybrid (default)
Combines keyword and semantic. Best general-purpose mode — finds passages by both wording and meaning.

Semantic
Pure meaning-based search using vector embeddings. Best when you don't know the exact phrasing — describe what you're looking for instead.

Keyword
Strict literal matching. Best for proper nouns, defined terms in a contract, statute references, and anything where the wording itself matters.

Writing a query

Type your query in natural language: *"What was the agreed indemnity cap?"*, *"Discussion of force majeure"*, *"Communications between Smith and Patel in March"*. Add quotation marks around any terms that must appear literally: *"settlement agreement" damages* — the quoted phrase is required, the word *damages* is preferred.

Reading the results

Above the result list, the headline shows the authoritative total: *X hits across Y documents*. Each result is a passage from a document, with the document name, the page number, the matched terms highlighted, and a coloured border telling you how relevant ARBI Docs thinks it is — green for high, amber for medium, grey for low.

Click any result to open the document in the viewer, jumped to the cited chunk with a yellow highlight. Use the back button to return to the search results and explore the next match.

TIP If a search returns too many low-relevance hits, raise the relevance threshold (§5.2). If it returns too few, lower it — or switch from Keyword to Semantic to catch paraphrased matches.

5.2 Search filters and scoping

Narrow what's being searched and how strict the matching has to be. Save useful result sets as tags so you can return to them later.

Scope by document

The document filter at the top of the page lets you constrain the search to a subset — by folder, by tag, or by a manual multi-select. The current scope is shown above the result list as a chip you can click to remove. With no filter active, SmartSearch covers the whole workspace.

Relevance threshold

The relevance slider on the right has three preset positions: **Low** (shows everything ARBI Docs found), **Medium** (filters out weak matches), **High** (only strong matches). The headline count stays the same — these thresholds are applied client-side to the result list so you can move the slider without re-running the search.

Result views

Two layouts for the same results:

- **Grouped (default)** — passages clustered by document, with collapsible sections. Best when you want a sense of which documents are most relevant.
- **Flat** — all passages listed in ranked order. Best when you want to read every match in turn without losing your place.

Saving a result set

If a search turns out to be useful — say, every passage that mentions a particular counterparty — click **Save results**. ARBI Docs creates a workspace tag named *Search(your query)* and applies it to every document in the result set. From then on you can filter the document grid by that tag, attach it to a conversation, or pass it to an AI annotation job.

> **NOTE** Saved searches are snapshots, not live queries. They capture the documents that matched at the moment you saved, not future matches. To re-run the search and update the tag, run the same query again and click **Save results** with the same name.

5.3 The contacts directory

Your contacts are the people you've worked with on ARBI Docs — colleagues at your firm, external counsel, and anyone you've invited to a workspace.

What you see

Open the Contacts tab in the right-hand panel. Each contact has:

- **Name** — or email, if a name hasn't been set yet.
- **Status** — registered, invitation pending, or invitation expired. Pending contacts are shown with an amber badge; expired ones in red.
- **Shared workspaces** — every workspace you and the contact are both members of, as a small chip.
- **Unread badge** — a blue dot if they've sent you a direct message you haven't read yet.
- **Mute toggle** — silence notifications from a contact without removing them.

Adding a contact

1. Click New at the top of the contacts tab.
2. Paste one or more email addresses — commas, semicolons, spaces and new lines all work. Up to 100 at once.
3. Click Add contacts.

For each address ARBI Docs reports whether the person was already registered (added immediately), invited just now, or already in your contacts. Bad addresses are flagged with an error message you can act on.

Resending invitations

If a contact's invitation has expired, click the resend icon at the end of their row. ARBI Docs generates a fresh invitation code and re-sends the email.

Removing a contact

Contacts can be removed from the actions menu on their row. This removes them from your personal contacts list — it doesn't affect any workspace memberships they hold, which are managed separately (§2.2).

5.4 Direct messages

One-to-one direct messages are end-to-end encrypted. The server stores ciphertext only; messages are decrypted in the browser using your private key.

Where DMs live

Click any contact to open a direct message thread with them. Threads can open as a tab in the Contacts panel, or in a floating window — useful when you want to keep messaging while you work in the main pane. New incoming messages arrive in real time and the contact gets a blue unread dot.

Sending a message

Type a message and press `Enter` to send (`Shift` + `Enter` for a new line). The message is encrypted on your device with the recipient's public key before it leaves the browser. It appears immediately in your view with a single check mark — *sent*. When the recipient opens the thread, the check changes to two — *read*.

Encryption — what's actually private

Every user has a long-lived encryption keypair, derived from the keypair you set up at registration. Direct messages are encrypted client-side with the recipient's public key and your private key, using the X25519 Diffie-Hellman exchange. The server stores nothing but ciphertext — even an ARBI engineer with full database access cannot read your DMs.

> **IMPORTANT** End-to-end encryption depends on keeping your master password and recovery key secure. If both are compromised, an attacker who also has access to your account could decrypt new messages. Lose them both and there is no path to recover historical message content — that's the trade-off.

Muting and read receipts

The bell icon on a contact row toggles notifications for that thread. Muted contacts still receive your messages — you just don't get notified about theirs. Read receipts (the two-check indicator) cannot currently be disabled.

PART 6

Settings & Sharing

Your account, your password, your preferences. The mental model behind who can see what. And the bits of the platform that touch billing.

6.1 User profile and preferences

Two tabs in User settings: an Account tab for your identity, and a Preferences tab for the day-to-day defaults.

Where to find it

Click your avatar at the bottom of the sidebar and choose User settings. The two tabs are Account and Preferences.

Account

- **Avatar** — upload a profile photo. Visible to other members of any workspace you share.
- **Name** — given name and family name. Saves on tab-away.
- **Email** — your login identity. Changing it requires a two-step confirmation: you'll receive a three-word verification code at the new address. SSO users can't change their email from inside ARBI Docs — change it in your identity provider and it syncs on next login.

Preferences

- **Hide online status** — appear offline to other workspace members.
- **Enable Premium models** — opt in to third-party model access (OpenAI, Anthropic, Google). Off by default; on once you flip it. When on, pick the specific Premium model you want as default in the grid below.
- **Default model** — Standard (ARBI-hosted) is the default, unless you've selected a Premium model.

> TIP The choice you make in Enable Premium models is sticky. If your firm has a policy against third-party models for certain matters, turn it off in user settings and it'll stay off across sessions — you won't accidentally route a confidential question to a Premium model in a hurry.

6.2 Notifications

In-app toasts for transient feedback, the sidebar connection indicator for status, and email for things that need to reach you when you're not logged in.

In-app toasts

Most notifications happen as toasts in the corner of the screen — green for success, amber for warnings, red for errors, blue for information. Common toasts: a document finished indexing, a colleague shared a conversation with the workspace, a translation completed, an annotation job finished.

The real-time channel

While you're signed in, ARBI Docs keeps a WebSocket open between your browser and the server. New direct messages, document status updates, and workspace activity arrive in real time. The connection indicator at the bottom of the sidebar shows a green dot when it's healthy and an amber one if reconnection is in progress.

Email

You'll receive email for things that genuinely need to reach you when ARBI Docs isn't open:

- Workspace invitations and contact invitations (these include a three-word code).
- Email-change verification codes.
- Password-reset codes (for non-SSO accounts).
- Billing notifications from Stripe — invoice paid, payment failed, subscription cancelled.

Muting

You can mute notifications from a specific contact (§5.3) so their direct messages don't bring up toasts. Workspace-level notification suppression isn't currently exposed in the UI — if a workspace becomes too noisy, the practical answer is to collapse it in the sidebar and leave it.

> **NOTE** ARBI Docs doesn't currently send daily or weekly digest emails. If you rely on those for triage, set a calendar reminder to open the platform and check the Conversations and Documents lists — most teams check in once or twice a day.

6.3 Password, sessions and security

Change your master password, download a fresh recovery key, and log out of every session if you need to.

Changing your master password

From User settings → Account, click Change password. Enter your current password and the new one. Behind the scenes, ARBI Docs derives a new keypair from the new password and re-wraps every workspace key you hold and every direct message you've received. This is automatic — no manual re-sharing or re-encrypting needed.

> **IMPORTANT** SSO users can't change their master password here — your identity provider is authoritative for sign-in, but your master password is what encrypts your content and is set independently. If you forget it, use the recovery key (next).

Recovery key

At registration you downloaded a recovery key. To download a fresh copy any time — for example, before deleting an older one — click Download recovery key in the Security section. The new key replaces the old one; old copies stop working.

Sessions

The connection indicator at the bottom of the sidebar shows your current session's state. To force a fresh session — useful if anything feels off — click Refresh session. To log out, click Log out. To log out of every device and browser, choose the same option from the menu beside it. Logout clears local storage, IndexedDB and the session cookie; the next page load takes you back to the sign-in screen.

What ARBI never sees

It's worth being explicit about this:

- **Your master password** — never transmitted, never stored.
- **Your private keys** — derived from your password, held only in your browser.
- **Your direct message plaintext** — encrypted client-side, decrypted client-side.
- **Your unencrypted document bytes** — encrypted in the browser before upload.

6.4 The sharing & permissions model

Two layers govern who sees what: workspace membership decides which content you have access to at all; conversation sharing decides which threads you can read within those workspaces.

Workspace membership is the foundation

If you're not a member of a workspace, you cannot see any of its documents or conversations. If you are a member, you can see everything that's been shared with the workspace, and the documents that are workspace-wide visible. Your role (owner, collaborator, guest — §2.2) determines what you can *do*; membership itself determines what you can *see*.

Documents within a workspace

Documents are visible to all members of the workspace by default. They are encrypted at rest under the workspace key, which every member holds. There is no per-document permission; if you've been given the workspace key, you can decrypt every document in that workspace.

Conversations within a workspace

Conversations behave differently. By default, a conversation is private to its creator — only you can see it, even though it's inside a workspace others share. Clicking **Share with workspace** in conversation settings (§4.9) makes it visible to every workspace member. Sharing is one-way: there is no way to unshare.

External collaborators

To bring in external counsel — opposing side's lawyer, a foreign jurisdiction expert, a barrister — invite them to a workspace as a **guest** (§2.2). Guests can read shared documents and shared conversations but cannot upload, create or edit. This is the cleanest pattern for scoped external access.

Direct messages

One-to-one direct messages sit outside the workspace permissions model entirely. They are end-to-end encrypted between the two participants and visible to no one else — not workspace owners, not administrators. They follow you across workspaces and survive any membership change. The next page shows the workspace-level permissions as a single chart.

6.4 Permissions at a glance

A single chart for every resource type — files, conversations, custom fields, annotations and tags. What you can do depends on your role *and* on whether the resource is yours, someone else's and shared, or someone else's and private.

Workspace resources permission matrix

Resource	Guest	Collaborator	Owner
Your own resources (files, chats, tags, annotations)	n/a	V · C · E · D	V · C · E · D
Another member's *shared* resource	V	V · C · E	V · C · E · D
Another member's *private* resource	–	–	–
Workspace settings & members	V	V	V · E · D

V view · **C** create · **E** edit · **D** delete · **–** no access

How to read the chart

- **Private means invisible.** Resources within a workspace that are not shared cannot be seen by other members — not even the workspace owner. The owner can see the *count* of resources each member has created, but never the contents.
- **Defaults differ by resource type.** Conversations default to private; documents and annotations default to shared. The shared toggle can be flipped at any time, with one exception — once a conversation is shared with the workspace, it cannot be unshared.
- **Removing a member revokes their access** to everything they created in the workspace. Re-adding them later restores that access. Nothing is destroyed on removal; it is simply withheld.
- **Anyone can create and manage their own workspaces** and invite others as members. An owner cannot delete a workspace that still has other members, nor leave a workspace if they are the only owner — promote a collaborator first.
- **Common workspaces are different.** Only administrators create them, membership is open, and you cannot leave one or see its full member list.

6.5 Subscription and plan

Billing happens at the project level. From any project's detail view you can change packs, manage payment methods, and download invoices.

What a pack contains

The unit of subscription in ARBI Docs is a **pack**. Every pack comes with a fixed monthly allowance of AI credits, document storage, and collaborator seats. Buy more packs to lift any of the three. See the pricing page on arbi.city for current allowances.

Annual vs monthly

Annual billing carries a meaningful discount over monthly and is the default for most firms. Switch between the two from the project's detail view — the change takes effect at the next renewal.

Managing the subscription

From **Projects**, open the project, and click **Manage subscription**. ARBI Docs hands you off to the Stripe customer portal where you can:

- Add or remove packs.
- Switch between annual and monthly billing.
- Update the payment method.
- View and download every past invoice.
- Cancel the subscription (workspaces stay, billing stops, AI features pause).

Quotas in the UI

Current usage is always visible on the project list (§2.5) — AI credits used vs limit, storage used vs limit, collaborator seats used vs limit. The project detail view (§2.6) goes deeper, with usage broken down by day, by workspace, by user and by model group.

> **NOTE** If a payment fails, your project moves to *past due*. Existing workspaces keep working but new AI requests are blocked until billing is brought current. The Manage subscription portal walks you through retrying payment or updating the card on file.

APPENDICES

Reference

Concepts, shortcuts, and a contact card for when this guide doesn't have the answer.

Containers & content

Plain-English definitions for the canonical terms used throughout this guide and across the ARBI Docs interface — starting with what lives where.

Workspace
The matter-shaped container for documents, conversations and tags. Each workspace has its own encryption key. Members see what's inside; non-members don't.

Project
The billing container. Pools AI credits, storage and collaborator seats across one or more workspaces. Owners can set per-user daily caps and download invoices.

Document
A file you've uploaded (PDF, Word, Excel, email, image, audio, video) — or work product generated inside ARBI Docs (an artifact, a skill, a memory). Stored encrypted; parsed into chunks for citation and search.

Chunk
The smallest indexed unit of a document — typically a paragraph or table cell. Chunks are what AI answers cite and what SmartSearch returns. You won't usually interact with them directly; you'll see them highlighted when you click a citation.

Conversation
A chat thread bound to a workspace. Has a creator, an optional shared state, attached documents, and a tree of messages (because every edit creates a branch).

Message
A single turn in a conversation — either a user question or an assistant response. Assistant responses carry citations back to the chunks that grounded them.

Citation
A structured reference from a statement in an answer back to one or more chunks. Click any citation badge to open the cited passage in the viewer.

People, labels & billing

The rest of the canonical vocabulary — the people who do the work, the labels they apply, and the units the platform bills in.

User
A person with login credentials. Each user has a master password used to derive their personal encryption keypair. Users own projects, create workspaces, and hold workspace memberships.

Membership / role
The link between a user and a workspace. Three roles — owner, collaborator, guest — set what the user can do inside that workspace.

Contact
Someone you've invited or who has been registered as your contact. May be in registered (active account), invitation pending, or invitation expired state.

Agent
A persistent, autonomous user-shaped entity, owned by a real user, that can be invited to workspaces and given conversations or batches to process. Used for overnight or scheduled tasks. Most users never create agents directly.

Skill
A reusable prompt or procedure, stored as a workspace document. Some come built-in (Chronology, Summarise, Translate, Redline); others your firm may write.

Tag
A label template defined in a workspace. Types: checkbox, text, number, select, date, search. Tags with an instruction attached can be populated by AI in batch.

Annotation (tag application)
The link between a tag and a document — or a tag and a chunk. May include a free-text note and citations back to the passages that support the annotation.

AI credit
The unit of AI usage charged against a project's monthly allowance. Standard models are usually free; Premium models bill per million tokens at pass-through rates.

Pack
The unit of subscription. One pack contains a fixed amount of AI credits, storage and collaborator seats. Stack packs to lift your quotas.

How the pieces fit together

A short walkthrough of a typical request, end to end, so the terms above stop being abstract.

You log in as a **user**. Your firm has set up a **project** with a Stripe subscription that pays for AI credits, storage and seats. Inside that project sits the **workspace** for the matter you're working on. You are a **member** of that workspace, with the **collaborator** role.

You drop a hundred **documents** into the workspace. ARBI Docs parses each one into **chunks**, encrypts the originals under the workspace key, and indexes the chunks for search and retrieval. While this happens you draft a **tag** with an AI instruction — "What is the governing law of this contract?" — and apply it to the lot. ARBI Docs reads each contract, writes an **annotation** per document, and attaches the chunks it relied on as **citations**.

Now you open a **conversation**, pin the contract you care about most, and ask a question. The assistant retrieves relevant chunks, generates a response, and includes **citations** back to the chunks that grounded the answer. The response is a **message**; the citations are the audit trail.

You realise you want to compare two versions of the contract. You select both documents and click Redline — a **skill** built into ARBI Docs. The result is a clean diff you can paste into a brief.

You add a colleague as a **contact** and invite them to the workspace as a **guest**, then send them a **direct message** — end-to-end encrypted — pointing them at the relevant conversation. They sign in and can read everything that's been shared with the workspace, including your annotated documents.

At month end you, as the project's owner, open the project's detail view and check usage by workspace and by user. You spot one heavy day, look at the model breakdown, and decide whether to set a per-user daily cap going forward. Stripe sends an invoice; the project keeps running.

That's it — the whole platform, in one matter's worth of work.

APPENDIX B

Keyboard shortcuts

A small, ergonomic set of shortcuts for the actions you'll do most.
Platform-aware: `⌘` on macOS, `Ctrl` on Windows / Linux.

Conversation

- `Enter` — Send the message.
- `Shift` + `Enter` — New line in the message.
- `Esc` — Cancel the in-flight generation.
- `↑` in an empty input — Edit your last message.

Document viewer

- `j` / `k` — Next / previous chunk.
- `n` / `p` — Next / previous page.
- `g` then `g` — Jump to the top of the document.
- `g` then `e` — Jump to the end of the document.

Documents grid

- `⌘` + `A` — Select all rows in the current filter.
- `Shift`-click — Select a range.
- `⌘`-click — Add to or remove from selection.
- `Delete` — Delete selected documents (with confirmation).

Global

- `[` — Toggle the sidebar.
- `⌘` + `K` — Quick-switch between conversations and documents.
- `?` — Open the help overlay (a live, in-app version of this appendix).

> **TIP** The keyboard shortcut surface evolves quickly. The in-app help overlay (`?`) is always the most current — this appendix is a snapshot of the shortcuts most users rely on day-to-day.

APPENDIX C

Getting help

If this guide hasn't answered your question, here's how to reach the team — and what to send when you do.

Email support

Write to support@arbi.city. Include your workspace name and, if relevant, the conversation or document the question relates to. We aim to reply within one business day; urgent issues marked *[urgent]* in the subject line get same-day attention.

In-app help

Press `?` from anywhere in ARBI Docs to open the help overlay. It includes a live keyboard-shortcut list, links to the latest version of this guide, and a short-form contact form that routes straight to support.

Stay current

ARBI Docs ships new features regularly. The product brochure on arbi.city is updated alongside each major release. Future editions of this guide will be made available at the same address.

About ARBI City

ARBI City Ltd is the company behind ARBI Docs and the broader ARBI platform — a private, single-tenant AI infrastructure built specifically for the legal sector. We are based in Juxon House, on the south side of St Paul's Churchyard in the City of London. Our work is structured around three branches: ARBI Docs (the platform this guide describes), ARBI Box (dedicated on-premise deployments), and ARBI Uni (training and workshops for legal teams adopting AI in their practice).

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