TitanNeo
SERVER

GETTING STARTED

SETUP AND CONFIGURATION GUIDE FOR TITAN NEO SERVER

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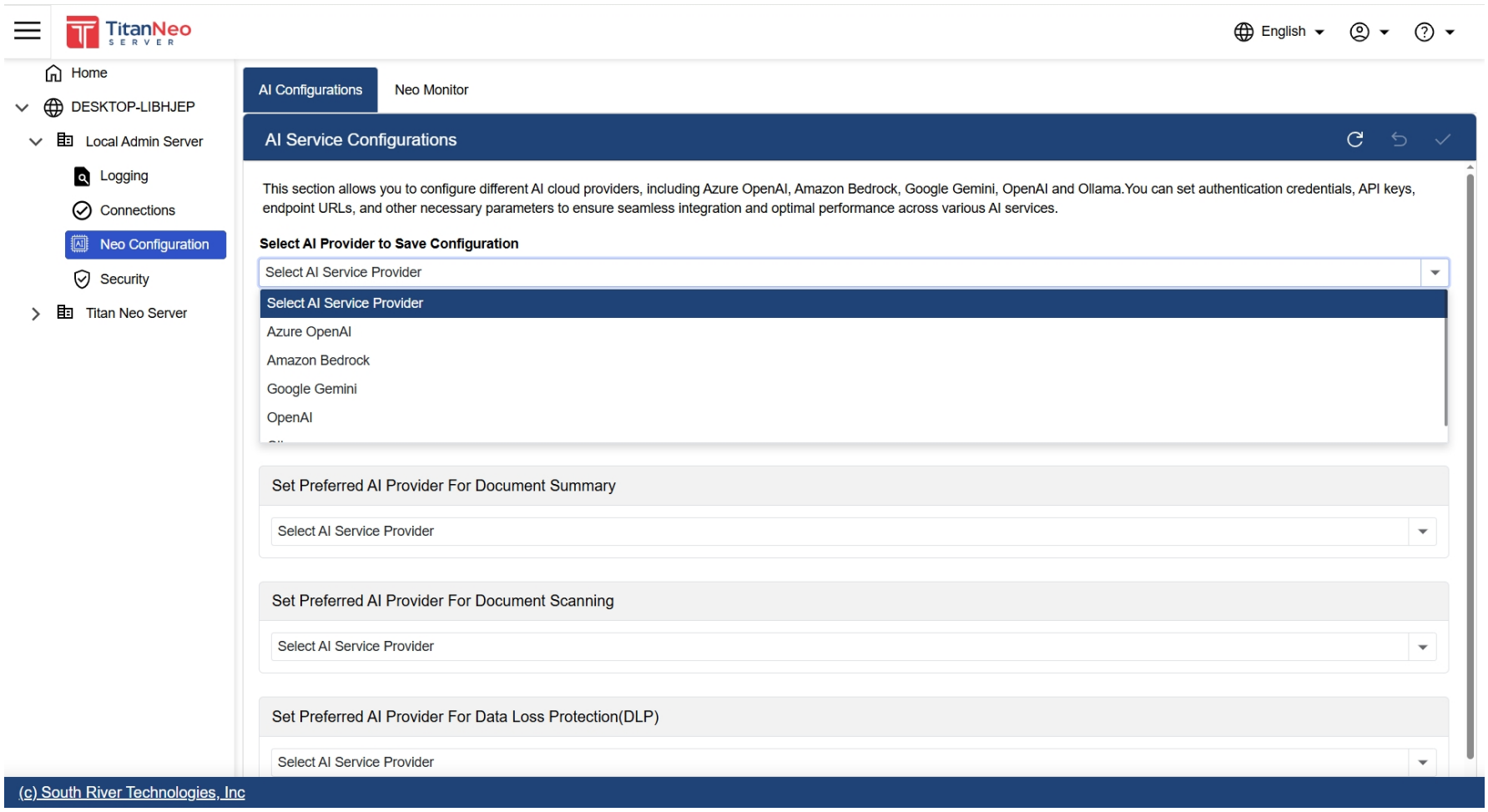
Titan Neo Getting Started

To use Titan Neo Features in Titan SFTP or Titan MFT, ensure you have Titan SFTP or MFT running and available for use. Then, create and start a Titan Neo from the Azure or AWS Marketplace.

On the first launch of Titan Neo, you'll be prompted to review and accept the EULA. Create an Initial Administrator Username and Password to login.

Configuration within Local Admin Server

To begin, navigate to the Local Admin Server menu on the left and select "Neo Configuration". Select and configure the AI Provider which you have access to and intend to use.



Click the dropdown for "Select AI Provider to Save Configuration" and select an available option (e.g. Azure OpenAI, Bedrock, Gemini, OpenAI, Ollama). The exact configuration options will vary depending on the provider chosen, but will consist of a combination of the following:

- API Endpoint: URL to connect to the AI Provider
- API Key: Access Key from the AI Provider for authentication
- Model API Endpoint: URL to connect to the specific AI Model
- Model/Deployment Name: Name of specific AI Model for use
- Use the "Test Connection" options to verify configuration

NOTE: The system will come with Ollama installed and preconfigured for use. You can utilize Ollama, or choose to connect to your own preferred AI Service Provider. Ollama requires a lot of CPU horsepower and can be quite slow when running on an underpowered system. For better performance we recommend using OpenAI or Google's Gemini which will require your own API key which you can get from your AI provider.

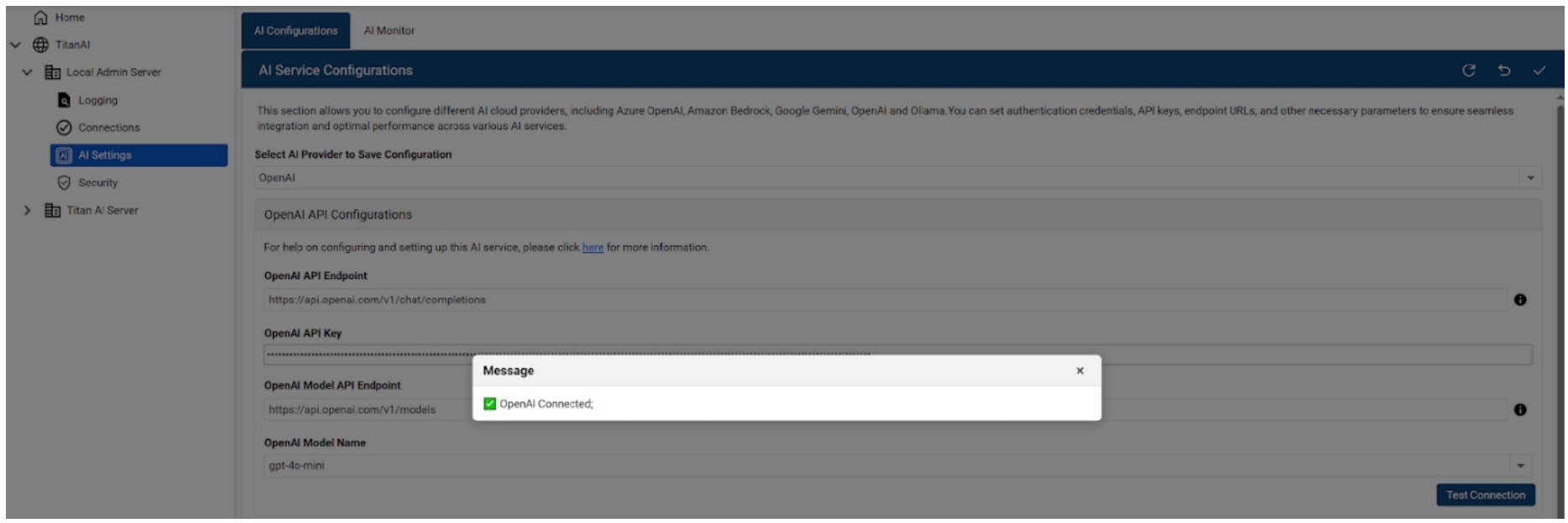
For help retrieving connection information, check with the AI Service Provider you have selected for use.

- Example: Log into your account at openai.com to find your API Key for OpenAI

NOTE: IF AZURE OPENAI:

- *Azure Document Summarize Endpoint: URL to connect to Summary services*

- *Azure Document Summarize Access Key: Access Key from Azure for authentication and use of Document Summarize service*



"Enable Document Viewer": Enable this option to allow the AI Service to be used with Document Viewer (AI Assistant and other functionalities when viewing files)

Once complete, the Titan Neo is now configured for use. You can utilize it locally on this system, if desired, but the main use case would be connecting to a Titan SFTP or Titan MFT Server for integration and use within your main server.

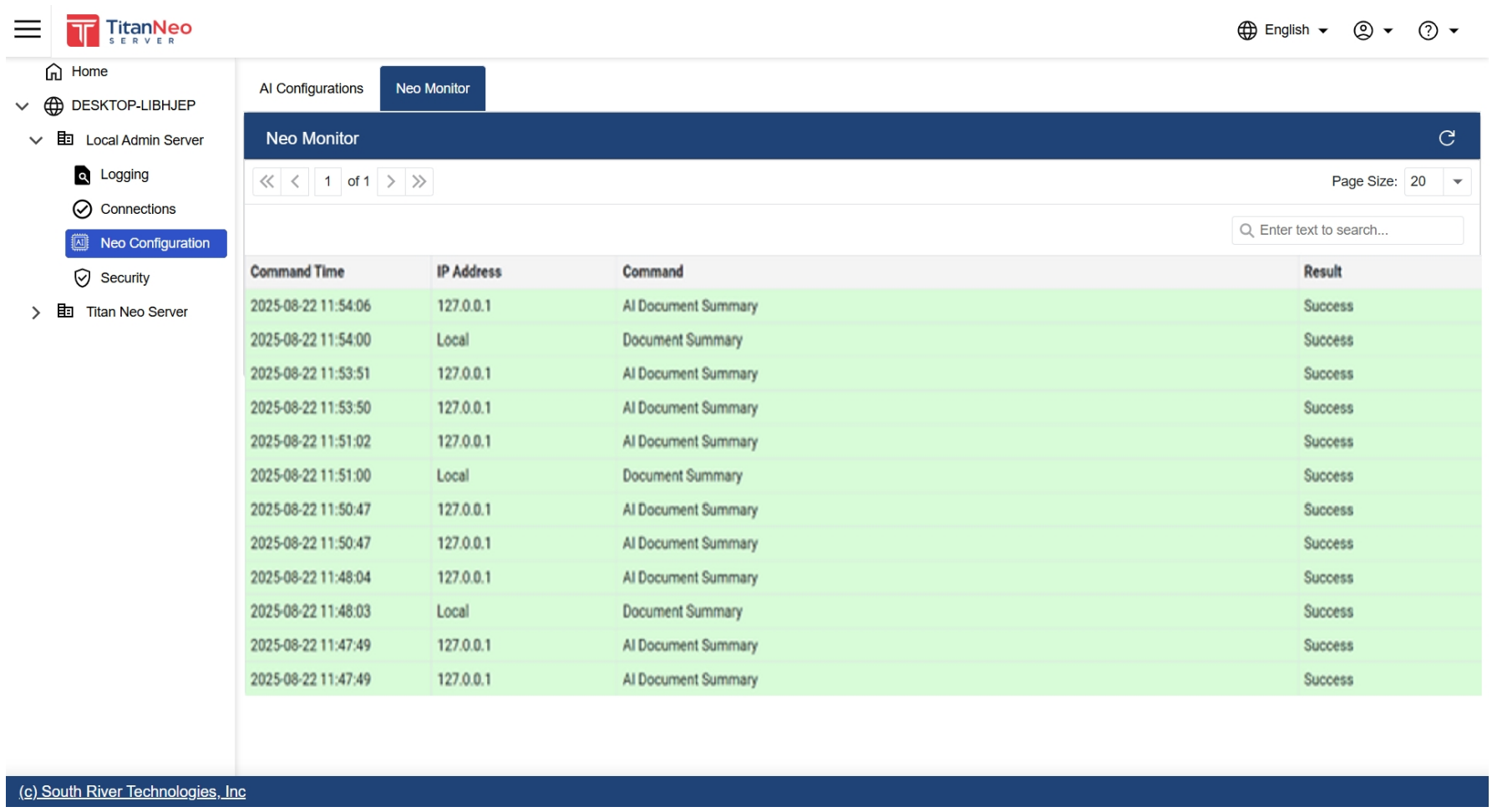
Titan allows utilizing more than one AI Provider, if desired. Preferred AI Provider configuration allows selecting which AI Provider/Service to use for each of the functionalities within Titan Server. Ensure to select an option from the dropdown list for each functionality, even if you have only one Provider configured.

Configuration of Specific Titan Neo Instance

- **AI Settings**:
  - **AI Configurations**: Inherit AI Settings from the Local Admin Server settings or Override at Server Instance level. You may choose to Override global settings and configure settings for individual server instances. This is not generally required for most use cases and for assistance in configuring this way, please see related Knowledgebase Articles or contact Support for assistance: Support Portal

Neo Monitor: View a list of request Commands/Actions across the Neo

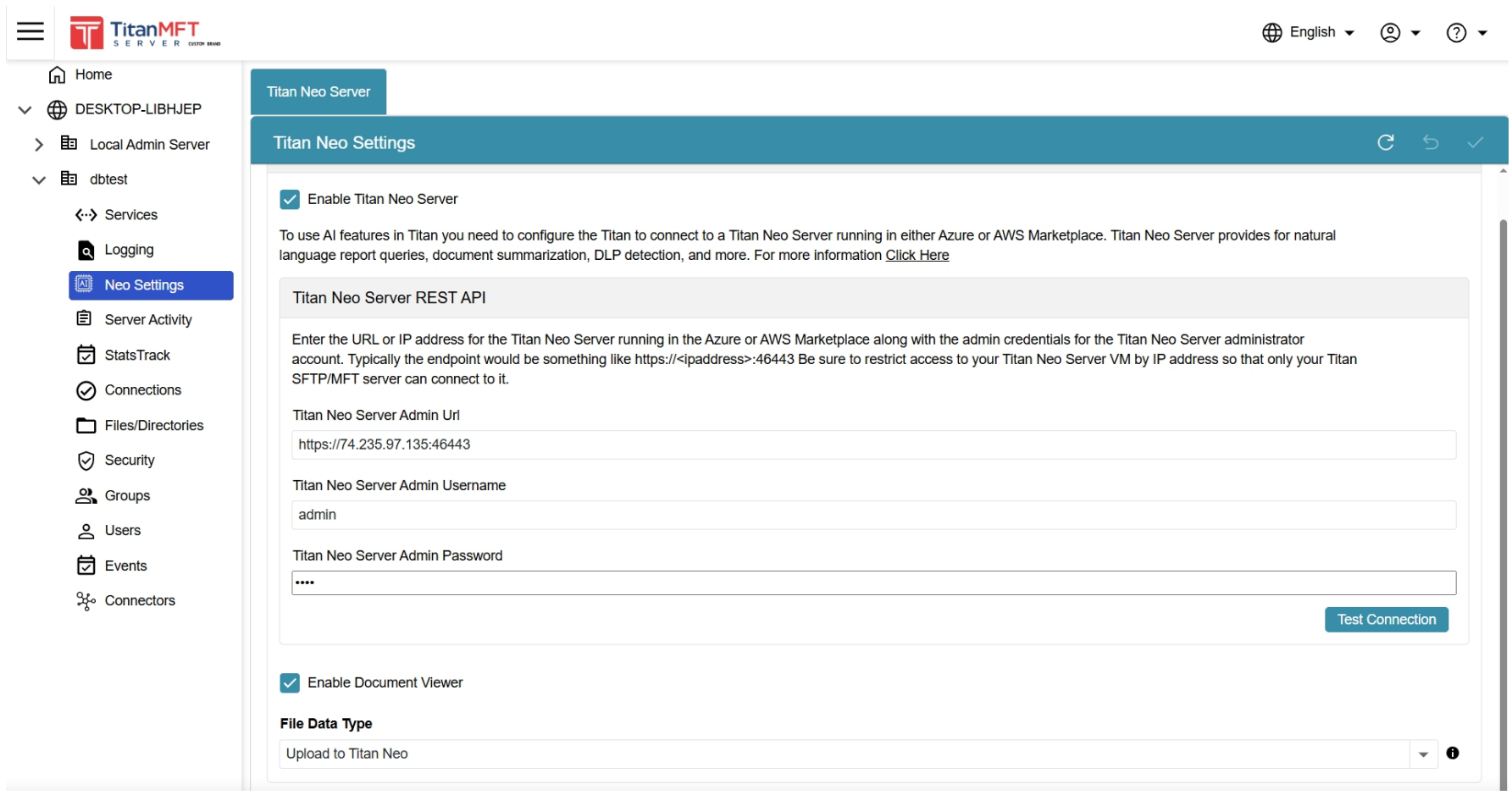
- Command Time: Timestamp for when the listed action occurred
- IP Address: IP Address that issues the command
- Command: Specific command sent to the AI Server
- Result: Status of the Command (e.g. Success or Failure)
- Page Size: Select a value from the dropdown menu to choose how many entries to display on each page
- Search: Enter text into the Search field to search the AI Monitor list results



Next, log into the Administrator for your Titan SFTP or Titan MFT Server.

Configuration on Titan SFTP or Titan MFT Server

Select the dropdown for your Titan Server. (e.g. MyTitanServer) and then navigate to the AI Settings menu.



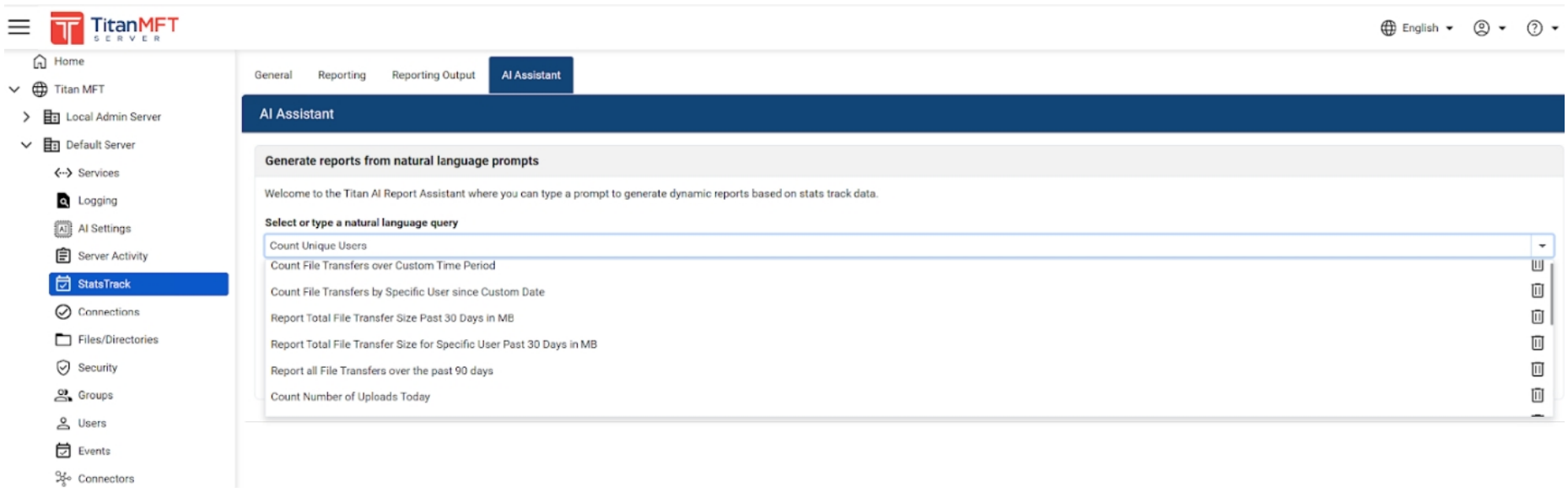
- Check the box to “Enable Titan Neo”
    - Titan Neo Admin Url:
        - Provide the URL for connecting to Titan Neo
            - This is the URL or IP Address for the Titan Neo Administrator and access to the system
                - Remote Admin access, by default, would be something like https://PublicIP:46443
            - If installed on the same Windows machine, e.g. https://localhost:36443
    - Titan Neo Admin Username:
        - Provide the Administrator Username created when installing and configuring Titan Neo
    - Titan Neo Admin Password:
        - Provide the Password for the Titan Neo Administrator Username
- Choose “Test Connection” to verify the connection information
- File Data Type: Select how files should be accessed by Titan Server
    - Upload to Titan Neo: Upload the entire file to Titan Neo for use
        - This is the default action, and must be used if Titan Neo and Titan SFTP/MFT Server do not have access to the same shared file system.
    - Send Filename Only: Send only the filename to Titan Neo
        - If Titan Neo and Titan SFTP/MFT Server have access to the same file system, sending only the filename would improve performance.

Click the “Check” icon at the upper right of the page to Apply the changes

StatsTrack: In the StatsTrack menu, choose to “Enable Statistics Tracking”

Navigate to the AI Assistant tab for AI-related queries and reporting.

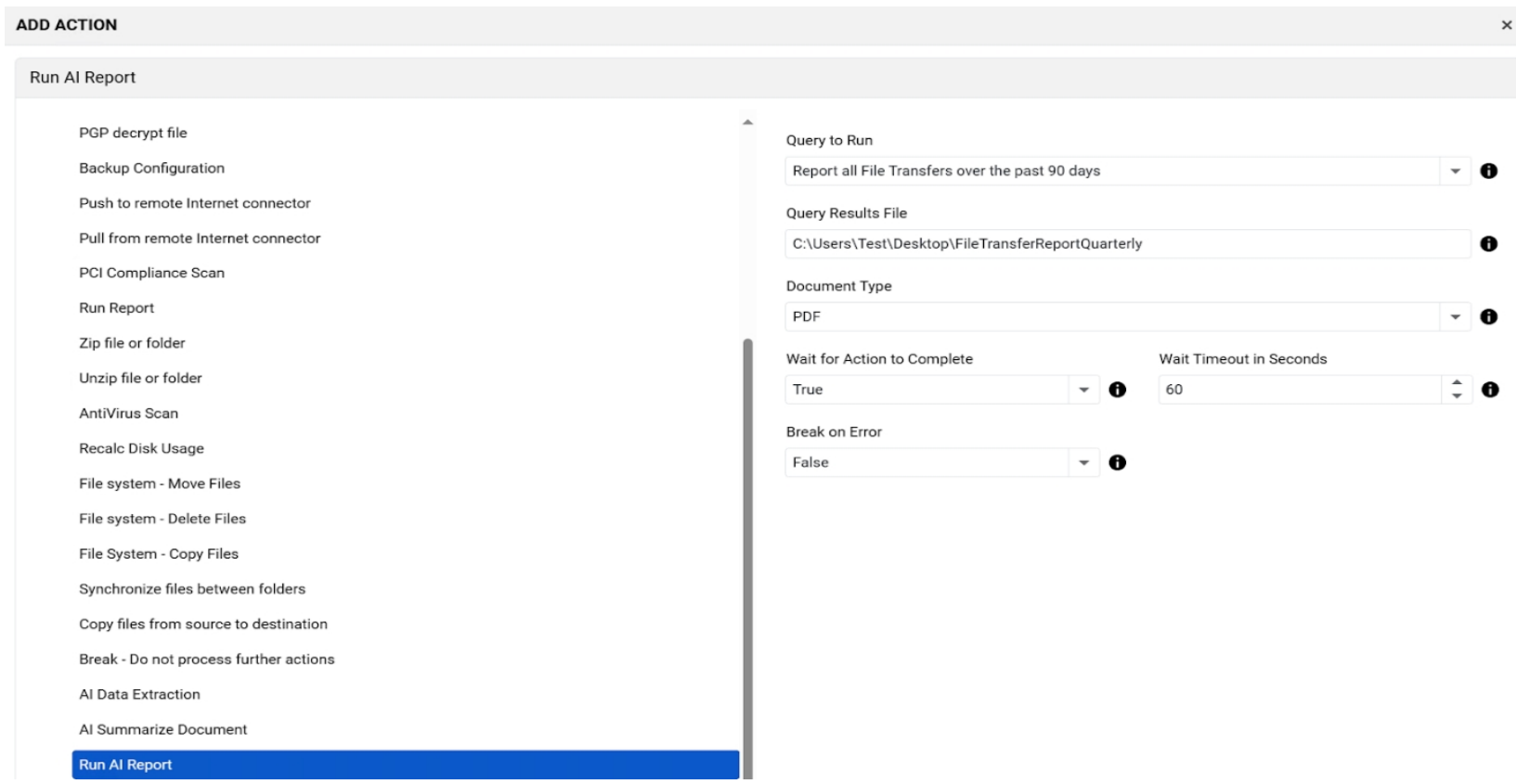
- Pre-created queries will exist in the dropdown. Feel free to select any relevant queries from the dropdown for running. These queries can be run anytime using the “Run Query” option
    - You can also choose to Delete any queries that are undesired using the icon to the far right of each of the queries



- Type in any questions or queries you would like answered regarding your Titan Server environment, and the AI Assistant will provide you with numerical answers or graphical PDF reports
    - Choose to “Save Query” if you want to keep a query for future use
- Use the “Query Details” option to see both the natural language for a query as well as the specific query sent to the database in its native language to extract the data
- In addition to running the query manually, these Queries can be part of Titan Server Events (workflows) to use in automated scenarios, either Scheduled or Triggered Events based on actions occurring within the Titan Server environment

- Queries can be run and reports generated on a regular schedule or based on specific actions (e.g. User uploads files, or User logs out)

Navigate to the Events menu and build out your Event workflow. When you are selecting the “Action” to take, choose Run AI Report:



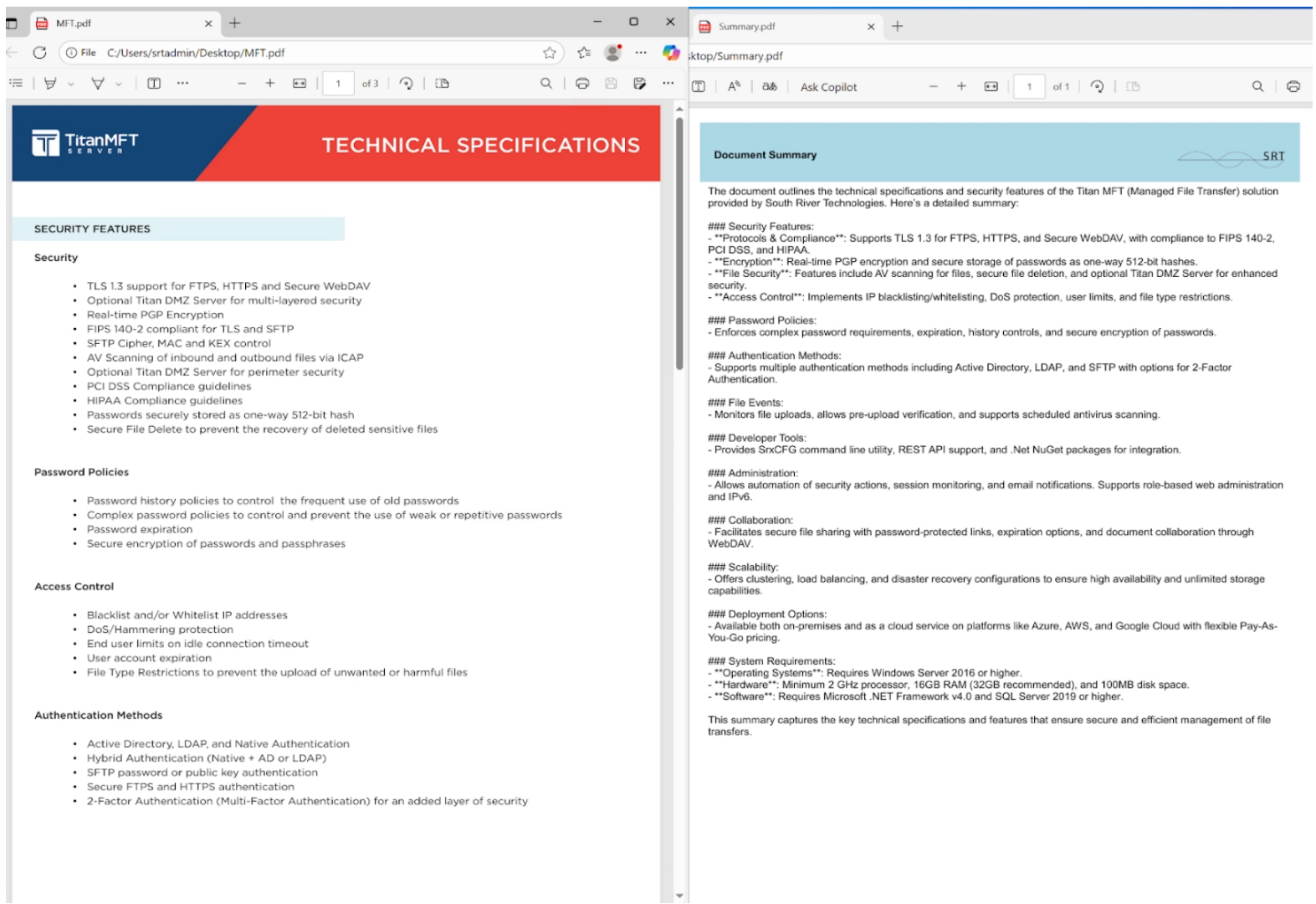
- **Run Neo Report**:
  - Query to Run: Dropdown list of options
    - Select the Query to Run from the list. This list contains the entire list of queries found in the StatsTrack AI Assistant section of Titan. Any of the default queries or user-saved queries can be selected
  - Query Results File:
    - Path and Name for the resulting report
  - Document Type – Dropdown list of options
    - File Type for the resulting file summary
  - Wait for Action to Complete:
    - If **Enabled,** the action will wait for this operation to complete before returning and moving forward
  - Wait Timeout in Seconds:
    - If Wait for Action is enabled, this value (in seconds) indicates wait time before moving on even if action is not complete. Value of -1 will have Titan wait indefinitely
  - Break on Error:
    - If enabled and this action fails, the Workflow ends and subsequent actions are aborted. If there is no error, Titan will continue processing the workflow

Additional Neo Actions for automated workflows:

- **Neo Data Extraction**: Extract key-value data pairs from files
  - Source File to Scan:
    - Path and Filename to be Scanned for data extraction
  - Scan Result File:
    - Path and Name for the resulting data file
  - Document Type – Dropdown list of options

        - File Type for the resulting file summary
    - AI Prompt Filter: Provide a user prompt to refine results
        - AI will use the input to generate a more precise and relevant result
- **Neo Summarize Document**: Use AI Service to automatically summarize a document and provide resulting summary as a new file
    - Source File to Summarize:
        - Path and Filename to be summarized
    - Summary Result File:
        - Path and Name for the resulting file summary
    - Document Type – Dropdown list of options
        - File Type for the resulting file summary
    - AI Prompt Filter: Provide a user prompt to refine results
        - AI will use the input to generate a more precise and relevant result

Example screenshot showing a 3+ page document summarized into less than 1 page with relevant information as categorized by the AI Provider (example shown from OpenAI)



Neo Event Conditions: Sensitive Data Found

Utilize the Data Loss Protection (DLP) functionality of Titan Neo to create automated responses and take actions based on sensitive data being found. You can choose to look for Medical Information, Financial Information, or provide your own Custom Prompt for Titan to look for. Then, continue configuring your Event workflow to choose the Action(s) for Titan to take when this condition is met.

NOTE: If you have sensitive data It is recommended to utilize Ollama for such use cases, as Ollama is a local model and sensitive data does not need to be sent to external AI engines. This ensures your information remains secure as it is kept local

to your system. Some AI providers also provide an option where your data is kept secure and private, please consult your AI provider for details.