ORYELE DOCUMENTATION

Getting Started

Everything you need to go from zero to live on the Oryele platform.

This guide walks new administrators and team leads through platform orientation, initial configuration, access control, and first integrations. By the end you will have a working environment ready for your first digital worker.

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Platform Overview

Oryele is a digital workforce platform built for professional services firms. It combines AI-powered digital workers, a visual workflow engine, multi-channel communications, a governed knowledge base, and real-time analytics into a single operating environment.

Layer	What It Does
Digital Workers	AI agents that perform defined roles, handle tasks, and escalate when needed
Workflow Engine	Visual process builder with conditions, approvals, and human handoffs
Communications	Unified SMS, email, voice, and calendar across Microsoft 365 and Google Workspace
Knowledge	Curated, versioned knowledge that workers reference when processing tasks
Governance	Audit logs, legal hold, role-based access, and compliance controls
Analytics	Live dashboards showing throughput, SLAs, escalation rates, and worker performance

> **Note** The platform is modular. You can enable only the layers your firm needs today and activate additional capabilities as your workflows mature.

Initial Setup Guide

Complete onboarding in under 30 minutes by following these four phases.

Phase 1: Organization Configuration

- Log in to your Oryele tenant and open Settings > Organization.
- Set your firm name, time zone, and default locale.
- Upload your logo for use in client-facing communications.
- Configure your billing contact and notification email.

Phase 2: Invite Your Team

- Navigate to Settings > Team Members and click Invite.
- Enter email addresses and assign an initial role (Admin, Manager, or Member).
- Users receive an invitation email with a secure one-time link.
- Invitees complete identity verification before first login.

Phase 3: Connect Your First Integration

- Go to Integrations and choose Microsoft 365 or Google Workspace.
- Authorize Oryele to access calendar, email, and contacts via OAuth.
- Map your shared mailboxes to Oryele communication channels.
- Run a test sync to confirm bidirectional connectivity.

Phase 4: Verify and Go Live

- Review the Setup Health dashboard for any outstanding items.
- Confirm at least one Admin and one Manager user are active.
- Enable your first digital worker using a starter template.
- Monitor the Activity Log for the first 24 hours to confirm normal operation.

> **Tip** If you run into an issue during setup, the in-app chat connects you directly to the Oryele onboarding team. Most issues are resolved within one business day.

User Roles and Permissions

Oryele uses role-based access control (RBAC) to ensure each user and digital worker can only see and act on what their role requires.

Role	Access Level	Typical Use
Owner	Full platform control including billing and tenant deletion	Firm principal or IT lead
Admin	All settings, integrations, and user management except billing	Operations manager
Manager	Create and edit workflows, workers, and team assignments	Department head
Member	Execute assigned tasks and view permitted dashboards	Staff accountant
Digital Worker	Scoped to its assigned workflows and channels	Automated agent

Auditor	Read-only access to audit logs and compliance reports	Compliance officer

Configuring Custom Permissions

- Navigate to Settings > Roles and click New Custom Role.
- Choose a base role to inherit from, then add or remove specific permissions.
- Assign the custom role to users or digital workers from their profile page.
- Review active role assignments quarterly as part of your access audit.

Best Practice	Apply the principle of least privilege. Start with the most restrictive role that allows the user to complete their work, and expand permissions only when a documented business need exists.

Connecting Your Calendar and Email

Oryele supports Microsoft 365 and Google Workspace natively. Connecting these platforms unlocks communications automation, scheduling workflows, and client-facing messaging directly from your existing business email and calendar infrastructure.

Microsoft 365

- Go to Integrations > Microsoft 365 and click Connect.
- Sign in with a Global Admin or Exchange Admin account.
- Grant Oryele the requested delegated permissions (Mail.ReadWrite, Calendars.ReadWrite, Contacts.Read).
- Select which mailboxes and calendars to sync.
- Set a sync interval (recommended: 5 minutes) and save.

Google Workspace

- Go to Integrations > Google Workspace and click Connect.
- Authorize via your Google Super Admin account.
- Choose the organizational units to include in the sync.
- Confirm shared drive access if document attachments are needed.
- Test the connection using the built-in diagnostic tool.

Security	Oryele uses OAuth 2.0 for all identity provider connections. Credentials are never stored in plain text. You can revoke access at any time from the integration settings page or directly from your Microsoft or Google admin console.