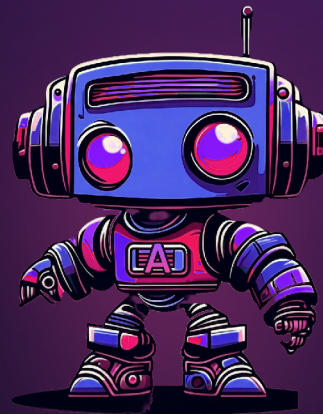


TOPIC 3 OF 6

Working with your files & tools

Ask Aperio to build a file, hand it a file to read, or point it at a whole folder — all on your own computer.



Beyond chat and memory, Aperio can build, read, and search real files on your computer.

WHAT'S INSIDE

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Attach it, then ask questions

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PART 1

Create a file

After this page, you can ask Aperio to build a spreadsheet or document for you, right in chat, and save it to your computer.

Say you want a shopping list, a simple budget tracker, or a set of scribbled notes typed up properly. Just describe it in plain words — Aperio builds a real file, not a wall of text in the chat. A few real examples:

- *“Make me a spreadsheet with columns for date, item, and cost — I want to track my grocery spending.”*
- *“Turn this list into a packing checklist I can print.”*
- *“Write these notes up as a document I can send to my team.”*

- 1 In chat, describe the file you want, in plain words.
- 2 Watch the small card that appears in the chat — it fills in while Aperio builds the file.
- 3 When it's done, open the card to preview it, or click **Download** to save it to your computer.

DONE LOOKS LIKE

A finished file card appears in the chat, and Download saves a real spreadsheet or document to your computer.

! **The file isn't quite what I wanted.** Ask again with more detail — the exact column names, or the exact wording — the same way you'd correct a person.

! **I don't see a Download button yet.** Large files take a moment to build. Wait for the spinner on the card to finish.

NEXT Give Aperio a file

PART 2

Give Aperio a file to read

After this page, Aperio can read a file you already have and answer questions about it — no retyping.

Say you have a PDF bill, a Word document, a budget spreadsheet, or a photo of a handwritten receipt. Attach it, then ask about it in plain language. Aperio reads what's actually in the file instead of guessing — typed or scanned, it doesn't matter:

- “What's the total on this bill?” — a PDF
- “Summarize this report in three sentences.” — a Word document
- “What did we spend on the Expenses tab in June?” — a spreadsheet
- “What does this say?” — a photo of a handwritten note or a receipt

- 1 Next to the chat box, click the paperclip icon (**Attach files**), or drag the file in.
- 2 Ask your question about it in plain language.
- 3 Read Aperio's answer — it comes from what's actually in the file.

DONE LOOKS LIKE

Aperio's answer matches something really in the file you attached.

! **Aperio says it can't read the file.** It reads PDFs, Word documents, spreadsheets, PowerPoint slides, plain text, and images (including photos of paper documents). For anything else, save or export it to one of those first.

! **The file is long, and the answer misses something.** Ask about one part at a time — for example, “What's on page 3?” or “Just the Marketing section, not the whole report.”

NEXT Search a whole folder

PART 3

Search a whole folder at once

After this page, Aperio can search and answer questions across every file in a folder you choose — not just one file at a time.

Say you have a folder of household papers — insurance policies, warranties, instruction manuals, spreadsheets, even a few scanned pages. Instead of attaching them one at a time, point Aperio at the whole folder once. It reads everything inside and remembers which file each answer came from, so it can also trace one detail across many files at once:

- *“Index the documents in my Household Papers folder.”*
- *“Which of my policies covers water damage?”*
- *“Which documents mention policy number HO-88214?”* — finds it everywhere it appears, even across different files
- *“Just show me the coverage section of the home insurance policy, not the whole thing.”*

- 1 In chat, tell Aperio the folder and ask it to index it.
- 2 Watch progress in the **Docs** panel, in the sidebar — indexing runs in the background, so you can keep chatting.
- 3 Once it says done, ask your question naturally. Aperio searches the whole folder for you.

DONE LOOKS LIKE

Aperio answers using the right file from the folder, and can tell you which one it came from.

! **Aperio says it isn't allowed to read that folder.** Open **Settings → Allowed folders** and add it — Aperio only reads folders it's been given permission for.

WORTH KNOWING

- If the folder is a programming project instead of documents, Aperio can also map how the code fits together — look for **Code** in the sidebar. (Not shown on Aperio-lite, since it's built for developers.)
- Indexing only reads folders already on this computer — Aperio never uploads your files anywhere.

You've now asked Aperio to build files, read the ones you already have, and search a whole folder at once — all using files already on your own computer. Want Aperio to work with your files or memory from inside Claude, Codex, or another AI tool you already use? That's covered in the *Connecting Aperio to your world* topic.