Operating Manual

Corporate Intelligence System

Publication Date: 05/18/2026

Author: Ivan Rodriguez

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10.000 - Why Organizations Lose Knowledge

Screen | 2026-05-11 00:00:00 IntroKnowledgeLoss

010.000 Why Organizations Lose Knowledge

Purpose

This section explains why organizations repeatedly lose valuable operational knowledge even while storing more files documents emails reports and data than ever before.

Understanding this problem is the first step to understanding why the Corporate Intelligence System is needed.

The Hidden Problem

Most organizations do not fail because information never existed.

They fail because useful knowledge exists everywhere but is organized nowhere.

Policies may be stored in one folder.

Procedures may be buried in email threads.

Critical spreadsheets may exist only on one desktop.

Legacy program logic may be understood by only one employee.

Important decisions may exist only in meetings or memory.

When Experience Walks Out the Door

A common business risk occurs when experienced personnel retire resign transfer or become unavailable.

When that happens the organization often discovers that key processes were never fully documented.

How was that report prepared.

Why was that vendor selected.

Which month-end adjustment was always required.

What shortcut kept the operation running.

If the answer lived only in one person's experience the organization loses that value immediately.

Too Many Files Too Little Access

Many organizations believe they have preserved knowledge because they have years of files.

However volume is not the same as accessibility.

Thousands of PDFs do not create understanding.

Ten years of emails do not create usable policy.

Shared drives do not automatically become searchable intelligence.

Stored information without retrieval structure often remains practically invisible.

The Cost of Knowledge Loss

When knowledge is difficult to locate or no longer understood the cost appears in daily operations.

Employees interrupt others for routine answers.

New hires take longer to become productive.

Managers make decisions using incomplete information.

Departments repeat work already solved before.

Customers receive inconsistent answers.

Compliance support becomes harder to prove.

Technical debt increases because old systems are poorly understood.

Why Traditional Search Often Fails

Basic file search tools usually depend on exact words file names or memory of where something was stored.

If the user does not know the right term the right folder or the right document title the answer may never be found.

A user may search for vacation while the policy uses annual leave.

A user may search for refund while accounting uses credit memo.

The knowledge exists but language differences block retrieval.

Why This Problem Is Growing

Organizations now generate information faster than manual methods can control.

Emails increase.

Documents multiply.

Applications expand.

Staff turnover continues.

Regulatory requirements grow.

The result is more stored information and less usable clarity.

The Required Shift

Modern organizations must treat knowledge as an operational asset.

That means capturing it.

Structuring it.

Securing it.

Indexing it.

Retrieving it quickly.

Making it understandable to users.

How the Corporate Intelligence System Responds

The Corporate Intelligence System is designed to convert scattered information into structured searchable controlled organizational intelligence.

It transforms files procedures emails notes screens and documents into a usable knowledge environment.

Instead of asking who knows the answer users can ask the system.

Conclusion

Most organizations are not suffering from a lack of information.

They are suffering from unmanaged knowledge.

Once knowledge is structured and retrievable it becomes a strategic advantage.

ConfidentialImplementationNotice

Certain implementation details including retrieval scoring logic, instruction construction, and ranking algorithms are proprietary and are intentionally not disclosed.

These elements are considered confidential trade secrets of the system.

20.000 - Introduction to the Corporate Intelligence System

Screen | 2026-05-11 00:00:00 IntroSystem

020.000 Introduction to the Corporate Intelligence System

Purpose

This section introduces the Corporate Intelligence System and explains how it transforms ordinary stored information into searchable operational intelligence.

The platform is designed to help organizations preserve knowledge improve retrieval speed increase consistency and support AI-driven answers grounded in their own content.

What The System Is

The Corporate Intelligence System is a structured knowledge platform that combines documentation management intelligent search controlled retrieval and conversational AI.

It is not only a file repository.

It is not only a search engine.

It is not only an AI chat screen.

It is the coordinated use of structure indexing metadata security and retrieval logic to make organizational knowledge usable.

From Stored Information to Usable Intelligence

Many systems store documents.

Few systems turn those documents into operational answers.

This platform converts static content into a living knowledge environment through organized books chapters sections metadata keywords indexing and AI retrieval processes.

Information that was once difficult to locate can become immediately accessible.

What Content Can Be Managed

The system can work with many forms of business knowledge.

Policies and procedures.

Training manuals.

Operational guides.

Emails and memoranda.

PDF DOCX and RTF files.

Program documentation.

Screen help content.

Research notes and internal knowledge entries.

Historical reference materials.

How Knowledge Is Organized

Books act as top-level knowledge containers.

Chapters group related subject areas.

Sections organize detailed topics in logical order.

DocType identifies the nature of the content.

Audience controls visibility and access.

MetaData and Keywords reinforce meaning and improve retrieval quality.

This creates discipline instead of disorder.

How Search and AI Work Together

The search engine locates relevant content using structured retrieval methods.

Selected content can then be provided to the AI engine so responses are based on organizational knowledge rather than unsupported guessing.

This allows users to ask questions in plain language and receive grounded answers.

Operational Benefits

Employees locate answers faster.

New staff onboard more quickly.

Support teams answer consistently.

Managers gain easier access to policy and procedure guidance.

Developers understand legacy systems sooner.

Organizations preserve knowledge that might otherwise be lost.

Designed for Growth

The platform is intended to evolve over time.

New books can be added.

Existing chapters can be reorganized.

Documents can be replaced and reindexed.

Retrieval rules can be improved.

AI capabilities can expand while continuing to rely on controlled source knowledge.

What Makes This Different

Many products solve only one part of the problem.

Some store files.

Some provide search.

Some provide AI chat.

The Corporate Intelligence System integrates authoring ingestion search retrieval AI assistance and governance in one environment.

Conclusion

Information becomes valuable when it can be found trusted and used.

The Corporate Intelligence System is designed to turn stored information into a practical operational advantage.

30.000 - What This Platform Delivers

Screen | 2026-05-11 00:00:00 SystemFeatures

030.000 What This Platform Delivers

Purpose

This section explains the practical capabilities delivered by the Corporate Intelligence System and how those capabilities create value for organizations.

The platform is designed to unify documentation search retrieval AI assistance and publishing into one controlled environment.

A Unified Knowledge Environment

Many organizations use separate tools for manuals file storage search internal notes and AI experimentation.

This platform combines those functions into one integrated system.

Users can create knowledge load information search content and interact through AI without moving between disconnected applications.

Build Structured Books and Manuals

The system allows users to create books chapters and sections for organized long-term knowledge management.

Examples include operating manuals training guides policy libraries technical references and internal handbooks.

Books can be viewed online maintained over time and prepared for downloadable publication.

Load Existing Business Knowledge

Organizations often already possess valuable information in older formats.

The platform can ingest PDF DOCX RTF spreadsheets emails memoranda notes program files and free-form text.

Historical information can become current searchable knowledge instead of remaining trapped in archives.

Intelligent Search and Retrieval

The search engine uses more than simple keyword matching.

Retrieval methods may include keywords weighting synonyms phrase relationships phonetic matching metadata signals and semantic similarity.

This improves the chance of finding the right answer even when users ask in different language than the source material.

Grounded AI Assistance

The chat environment allows users to ask questions in plain language.

Relevant organizational content can be retrieved first and then supplied to the AI engine.

This supports answers based on actual source material rather than unsupported general responses.

Preserve Organizational Memory

Important procedures decisions methods and historical knowledge can be captured before they disappear through turnover retirement or system replacement.

The organization becomes less dependent on any single individual.

Improve Daily Operations

Employees spend less time searching.

New hires learn faster.

Support teams answer more consistently.

Managers locate policy and process guidance more quickly.

Developers understand older systems sooner.

Repeated questions can be answered through structured knowledge resources.

Controlled Security and Governance

Audience settings user permissions and controlled source content help ensure that users access only information appropriate to their role.

Administrative tools support maintenance scoring controls indexing options and operational oversight.

Designed to Grow with the Organization

New books may be added.

Additional content sources may be loaded.

Search logic may be refined.

AI capabilities may expand.

The platform is intended to improve over time rather than remain static.

What Makes This Different

Many products offer only storage only search or only AI chat.

The Corporate Intelligence System combines content creation ingestion retrieval conversational assistance and publishing in one coordinated platform.

Conclusion

This platform is built to turn organizational knowledge into a daily operational advantage.

When information is organized searchable and usable the entire organization performs better.

40.000 - Why AI Answers Succeed or Fail

Screen | 2026-05-11 00:00:00 IntroAISucceedFail

040.000 Why AI Answers Succeed or Fail

Purpose

This section explains why AI responses are highly useful in some environments and disappointing in others.

In most business settings answer quality depends less on hype and more on the quality of the underlying knowledge system.

The Common Misunderstanding

Many users assume the AI model alone determines answer quality.

That is only part of the picture.

If poor source material is supplied poor answers often follow.

If no relevant source material is supplied the response may become generic incomplete or incorrect.

Good Answers Require Good Inputs

AI systems work best when relevant information is retrieved and presented clearly.

When policies procedures manuals notes and records are organized the AI can respond with stronger

context.

When information is scattered outdated or missing answer quality declines.

Retrieval Usually Determines Quality

In many business applications the real challenge is not language generation.

The real challenge is locating the best supporting information quickly.

If the correct documents are found and supplied the AI often performs well.

If the wrong documents are selected the answer may miss the mark.

Why Structure Matters

Well-structured knowledge improves retrieval accuracy.

Books chapters and sections create order.

DocType helps identify the kind of information needed.

Audience settings enforce security boundaries.

MetaData and Keywords improve matching signals.

Clear writing improves interpretation.

Why Search Logic Matters

Strong systems do more than exact keyword matching.

They may consider synonyms phrases phonetic similarity metadata weighting usage patterns and semantic meaning.

This helps users find answers even when they ask in language different from the source text.

Why Source Quality Matters

If documents are outdated contradictory incomplete or poorly written the AI inherits those weaknesses.

Technology cannot fully compensate for unmanaged source material.

Better documentation often creates better AI performance.

Why Security Matters

Even accurate answers can become unacceptable if restricted information is exposed to the wrong audience.

Reliable AI systems require both intelligence and control.

Permission filtering and audience rules are part of answer quality.

Why Human Questions Matter

Clear requests often produce better results.

Specific questions with business context usually outperform vague one-line prompts.

Users should ask for the exact policy report process explanation or comparison they need.

What Successful Organizations Do

Successful organizations improve the full chain.

They clean source data.

They organize knowledge.

They improve indexing.

They refine retrieval logic.

They guide users on how to ask effective questions.

They monitor outcomes and continue improving.

How the Corporate Intelligence System Helps

The Corporate Intelligence System is designed around this reality.

It focuses on structured content controlled retrieval metadata search quality and grounded AI responses.

The goal is dependable operational answers rather than novelty.

Conclusion

When AI succeeds it often reflects strong systems behind the scenes.

When AI fails it often exposes weak structure weak retrieval or weak source material.

The quality of answers usually begins before the question is asked.

50.000 - Understanding Search Structure and Metadata

Screen | 2026-05-11 00:00:00 IntroKeys

050.000 Understanding Search Structure and Metadata

Purpose

This section explains how structured fields metadata and organized content improve search quality retrieval accuracy and AI response performance.

Well-managed structure helps the system locate the right information quickly and present better answers.

Why Structure Matters

Search systems perform best when information is organized instead of stored as random text.

Without structure valuable content may exist but remain difficult to locate.

With structure the system can rank prioritize filter and retrieve more intelligently.

Books Chapters and Sections

Books act as top-level containers for major subject areas.

Chapters group related topics within each book.

Sections organize detailed content in logical order.

This hierarchy helps both users and search engines understand where information belongs.

DocType

DocType identifies the kind of content being stored.

Examples may include procedure screen document email note policy manual or technical reference.

This allows the system to favor the most relevant content type for a request.

A procedural question may prioritize procedures while a historical question may benefit from notes or emails.

Audience and Security

Audience values help control who may view specific content.

Users should see only material authorized for their role.

Search quality includes proper filtering not only ranking.

Metadata

Metadata consists of descriptive values attached to content.

Examples may include department topic category system area process owner or functional group.

Metadata gives the platform context beyond raw document text.

This often improves matching when exact wording differs.

Keywords

Keywords are explicit signals describing what the content is about.

They strengthen relevance scoring and help connect user requests to the correct source material.

Well-chosen keywords improve discoverability.

Document Text Quality

The body text remains critically important.

Clear headings complete explanations logical paragraphs and consistent terminology improve retrieval and AI interpretation.

Poorly written content is harder to search and harder to trust.

How These Elements Work Together

Books chapters and sections provide hierarchy.

DocType helps intent matching.

Audience provides control.

Metadata and keywords provide context.

Document text provides evidence and detail.

Together these elements create a stronger knowledge system.

Impact on AI Responses

AI responses often depend on what content was retrieved first.

Better structure increases the probability that the best content is selected.

When retrieval improves answer quality usually improves with it.

Best Practices

Use clear chapter and section organization.

Assign accurate DocType values.

Maintain proper audience controls.

Add meaningful metadata and keywords.

Keep documents current and clearly written.

Review outdated or duplicate material regularly.

Conclusion

Structure is not administrative overhead.

It is one of the main reasons intelligent search and grounded AI can work reliably at scale.

2.000 - Using the Corporate Intelligence System

10.000 - System Login

Screen | 2026-05-11 00:00:00 login

010.000 System Login

Purpose

This screen allows authorized users to securely access the Corporate Intelligence System by entering valid credentials.

Login protects system data documents search functions AI features and administrative tools from unauthorized access.

Where To Find

The Login screen appears automatically when visiting the system web address or when a prior session has expired.

Users may also return to this screen after selecting Logoff.

Images

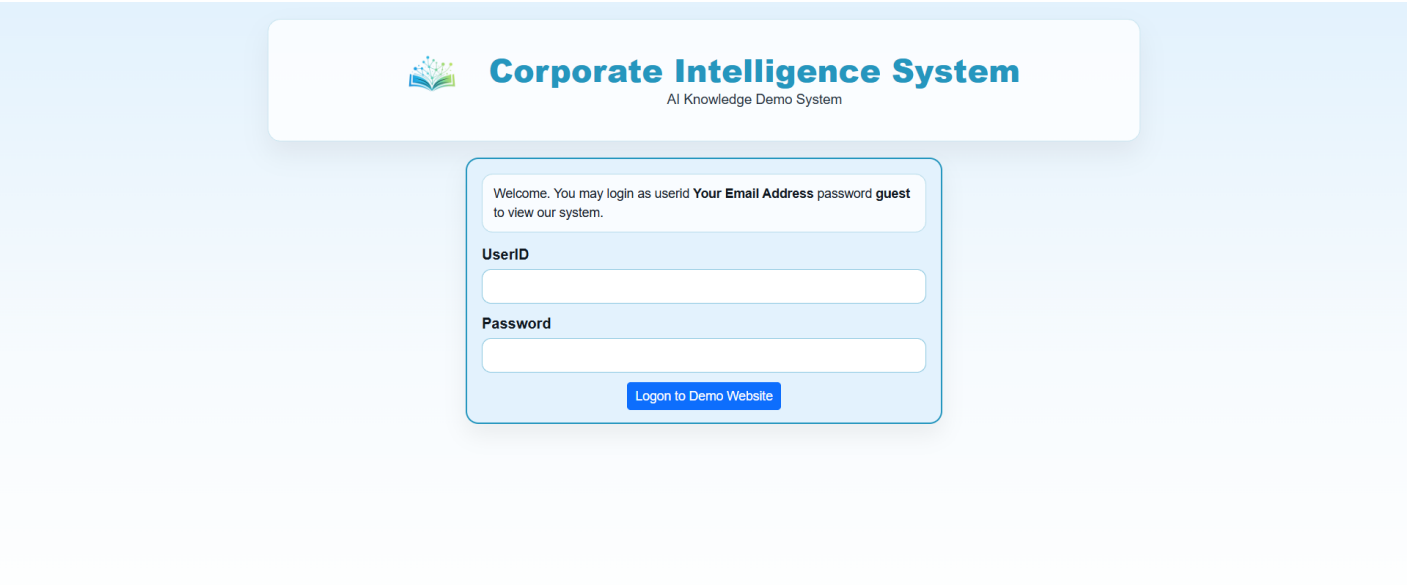


Figure: System Login screen used to authenticate authorized users and begin a secure session.

Why Login Matters

Different users may have different permissions.

Some users may only view documents and run searches.

Others may maintain manuals ingest documents manage users or control administrative settings.

Authentication ensures each user receives the proper level of access.

Buttons and Actions

Login validates the entered User ID and Password and starts a secure session when successful.

Cancel clears the entered values.

Forgot Password may be available if password recovery has been enabled by the administrator.

Fields or Settings

User ID is the unique account name assigned to the user.

Password is the confidential password associated with the User ID.

Rules and Validations

User ID and Password are normally required.

Passwords may be case sensitive depending on system configuration.

Repeated failed attempts may trigger security protections or require administrator review.

Downstream Effects

A successful login creates an active user session.

User permissions security groups and allowed functions are then applied throughout the system.

Visible menus available books accessible documents and administrative rights may vary by user.

Examples

Enter your assigned User ID and Password then select Login to open the Main Menu.

If you were previously inactive for an extended period you may be asked to log in again.

Troubleshooting

If login fails verify the correct User ID and Password were entered.

Check for typing errors spaces or incorrect capitalization.

If access still fails contact an administrator to confirm the account is active.

If the screen repeatedly reloads clear the browser cache and try again.

Security and Access

All access to the Corporate Intelligence System should begin through authenticated login.

User credentials should not be shared.

Always use Logoff when leaving a shared or public workstation.

20.000 - System Main Menu

Screen | 2026-05-11 00:00:00 Menu_Main

020.000 System Main Menu

Purpose

The System Main Menu is the primary navigation center for the Corporate Intelligence System.

This screen is normally shown after successful login and serves as the starting point for major platform functions.

When users select Home from other screens they are generally returned to this menu.

Where To Find

The Main Menu appears immediately after successful login.

It may also be reached by selecting Home while working in other programs.

If the session remains active users may return here at any time.

Images

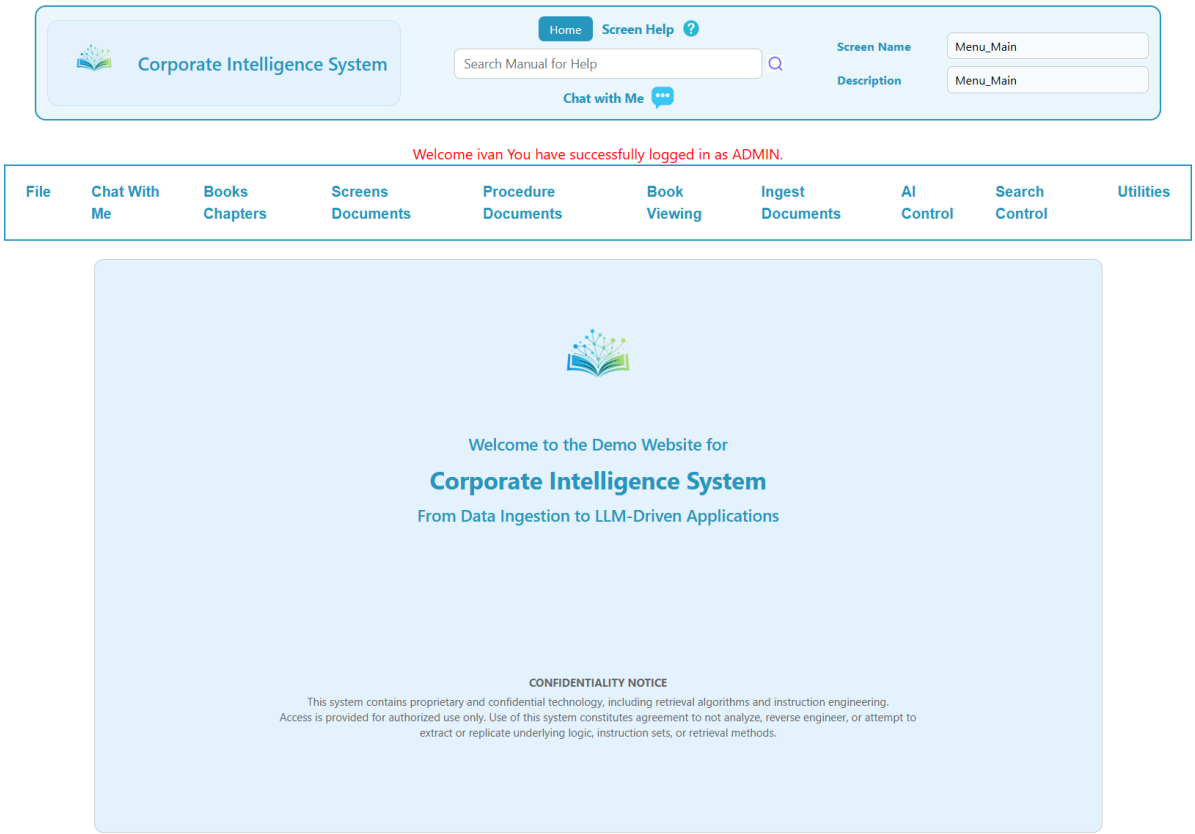


Figure: Main system menu and navigation gateway for books search AI chat ingestion administration and utilities.

Why This Screen Matters

This menu is more than a list of links.

It represents the overall architecture of the platform.

From this screen users move between knowledge creation document loading search retrieval AI assistance and administration.

It is the operational command center of the system.

How Navigation Works

The menu is grouped by business function.

Select a top menu heading to view available options in that category.

Select a menu item to open the requested program.

Some users may see fewer options based on security rights.

Use Home to return here after completing work elsewhere.

Main Menu Groups

File contains session controls such as Logon Logoff and Exit.

Chat With Me contains conversational AI tools chat history and memory features.

Books Chapters contains book and chapter setup functions.

Screens Documents manages screen help and section content.

Procedure Documents manages documented procedures and process guidance.

Book Viewing generates views and downloads manuals or books.

Ingest Documents loads external content into the knowledge system.

AI Control manages AI behavior synonyms scoring and host configuration.

Search Control manages indexing ranking search logs and related settings.

Utilities contains backups user maintenance and technical tools.

Common User Activities

Open the AI chat screen to ask questions against approved knowledge sources.

Search for manuals procedures or documents.

View books online or generate downloadable manuals.

Return to Home after completing work in another module.

Common Administrative Activities

Create books and chapters.

Maintain screen help and procedures.

Load documents for retrieval and AI use.

Adjust synonyms stop words and scoring rules.

Review search logs and system statistics.

Run backups and maintain users.

Buttons and Actions

Home returns the user to this Main Menu.

Menu headings expand available functions.

Selecting a menu item opens that program.

Logoff ends the current session securely.

Fields or Settings

There are no standard data-entry fields on the Main Menu.

This screen is navigation driven.

Displayed options may vary by user permissions.

Rules and Validations

Users must be logged in to access secured functions.

Restricted functions may be hidden or blocked based on access rights.

Inactive sessions may require login again.

Downstream Effects

Selecting a menu item opens another subsystem where actual work is performed.

The Main Menu itself does not directly change business data.

It controls access flow across the platform.

Examples

Select Chat With Me then Chat with AI to ask a question.

Select Ingest Documents to load a manual or file into the system.

Select Search Control to review search activity.

Select Book Viewing to generate a full manual.

Select Utilities before major changes to run a backup.

Troubleshooting

If a menu item does not open verify your security rights.

If the browser shows an unavailable page refresh and retry.

If you are returned to login your session may have expired.

If expected options are missing contact an administrator.

Security and Access

The Main Menu is available after successful login.

Individual menu options are controlled by user permissions.

Administrative functions should be limited to authorized personnel.

30.000 - Keyword Search Results

Screen | 2026-05-11 00:00:00 Search

030.000 Keyword Search Results

Purpose

This screen displays keyword search results generated from the system index.

It helps users locate books chapters procedures screen help documents and uploaded content that match the search terms entered from the main search box.

Where To Find

Enter search text in the search box near the top of the screen and select the search icon.

The system opens this results screen and displays matching content ranked by relevance.

Images

Figure: Keyword Search Results screen showing indexed matches returned from searchable system content.

Why This Screen Matters

Search is often the fastest way to locate existing knowledge without navigating through books chapters or menus manually.

The screen helps users move from a question or keyword to the most relevant available documentation.

How Search Results Work

The system searches indexed content created from books chapters procedures screens and documents.

Matching results are ranked by calculated relevance score.

Higher-ranked results appear first so the most likely matches are easier to review.

Buttons and Actions

Search Icon submits the entered keywords and executes the search.

View opens the selected result document procedure or screen help item.

Home returns the user to the Main Menu.

Fields or Settings

Search Text is the free-form text entered by the user to locate relevant documentation.

Result Card displays the document name book name description and calculated score.

Search Score is the numeric relevance value used to order results from strongest to weakest match.

Rules and Validations

Search operates only on content that has been saved and indexed.

New or revised documents may not appear until indexing has completed.

Stop words bypass terms synonyms and scoring rules may affect the final result set.

Downstream Effects

Selecting a result opens the related source material for review.

Search activity can also help administrators understand what users are trying to find.

Good metadata keywords headings and document text improve future search quality.

Examples

Searching for Chapter may return content related to creating managing or viewing chapters.

Searching for Operating Manual may return sections from the selected manual that contain those words.

Searching for login may return the System Login help screen if it has been indexed.

Troubleshooting

If no results appear confirm that the content has been saved and indexed.

If results seem incomplete review document headings keywords and metadata.

If ranking appears incorrect review search scoring controls synonyms and bypass word settings.

If restricted content is missing verify user permissions and audience settings.

Security and Access

Users can view only results permitted by their security group and audience settings.

Restricted content should not appear in search results for unauthorized users.

How Search Works

The system uses an inverted index structure where searchable words are mapped to the documents where they appear.

During indexing document text headings metadata and keywords are processed and stored with references to the source content.

When a search is executed the system retrieves matching references and calculates relevance using configured weighting rules.

The final result list is sorted so the strongest matches appear first.

35.000 - Search Results Screen

Screen | 2026-05-16 22:56:46 SearchResult

035.000 Search Results Screen

Purpose

This screen displays the complete help or procedure document selected from the Keyword Search Results screen.

It presents the full online manual section in the same format used throughout the system so users can read detailed documentation without leaving the search workflow.

Where To Find

Enter search text from the main search box and review the Keyword Search Results screen.

Select the View button beside any result to open this Search Results Screen.

Images

Figure: Search Results Screen displaying the full online manual section selected from keyword search results.

Why This Screen Matters

Search helps users locate relevant knowledge quickly, but this screen is where the complete content is actually displayed.

It allows users to move directly from a short result summary to the full source material including images, headings, and detailed instructions.

How the Screen Works

The Keyword Search Results screen passes the document type, source name, and display mode to this program.

The system determines whether the selected item is Screen help or a Procedure.

The matching record is located in the merged manual view and the complete content is retrieved.

The selected section is then displayed using the same layout and formatting as the Online Manual Viewer.

Buttons and Actions

Return closes the current display and returns the user to the Keyword Search Results screen.

Home returns the user to the Main Menu.

Fields or Settings

Book Name identifies the manual that contains the selected content.

Chapter Number and Chapter Name identify the chapter where the section is stored.

Section Number and Section Name identify the specific section being displayed.

Source Title identifies the originating Screen or Procedure name.

Content Area displays the full HTML or Text documentation in a scrollable viewing pane.

Mode and Updated Date display the storage format and the last date the content was modified.

Rules and Validations

The selected Screen or Procedure must exist in the manual merge view.

The source name passed from the search results must match a valid indexed document.

If no matching content is found, the system displays a warning message.

HTML content is rendered directly while Text content is displayed in a formatted preformatted block.

Downstream Effects

This screen is read-only and does not update any database records.

It provides a unified presentation layer for viewing indexed knowledge discovered through search.

The same content can also be accessed from the Online Manual Viewer and AI Chat Agent responses.

Examples

Selecting Chat History from search results opens the complete Screen help for the Chat History screen.

Selecting MonthlyGenerate opens the related Procedure documentation.

Selecting a chapter section from a book search opens the exact manual section where the terms were found.

Troubleshooting

If a 404 error occurs, verify that SearchResult.php exists in the website root directory.

If the warning No manual content found appears, confirm that the selected Screen or Procedure exists in Manual_Merge_View.

If formatting appears incorrect, verify that the stored HelpMode is set correctly to HTML or Text.

If images do not display, confirm that referenced image files exist in the images directory.

Security and Access

Users can view only documentation permitted by their security group and audience settings.

The same authorization controls used by the Online Manual Viewer apply to this screen.

Relationship to the Online Manual Viewer

This screen uses the same visual structure and display methodology as the Online Manual Viewer.

Book titles chapter headings section headings source names and formatted content are presented in an identical layout.

The only difference is that this screen receives its selection parameters directly from keyword search results instead of from a manual navigation menu.

40.000 - Downloading Documents

Screen | 2026-05-11 00:00:00 SN_DocView

040.000 Downloading Documents

Purpose

This screen is used to download a previously requested document from the Corporate Intelligence System.

It allows authorized users to retrieve source files associated with manuals procedures search results and other stored content.

Where To Find

This screen is normally opened automatically by another program when a user selects a document download option.

It is commonly reached from search results AI responses manuals or other screens that reference stored files.

Images

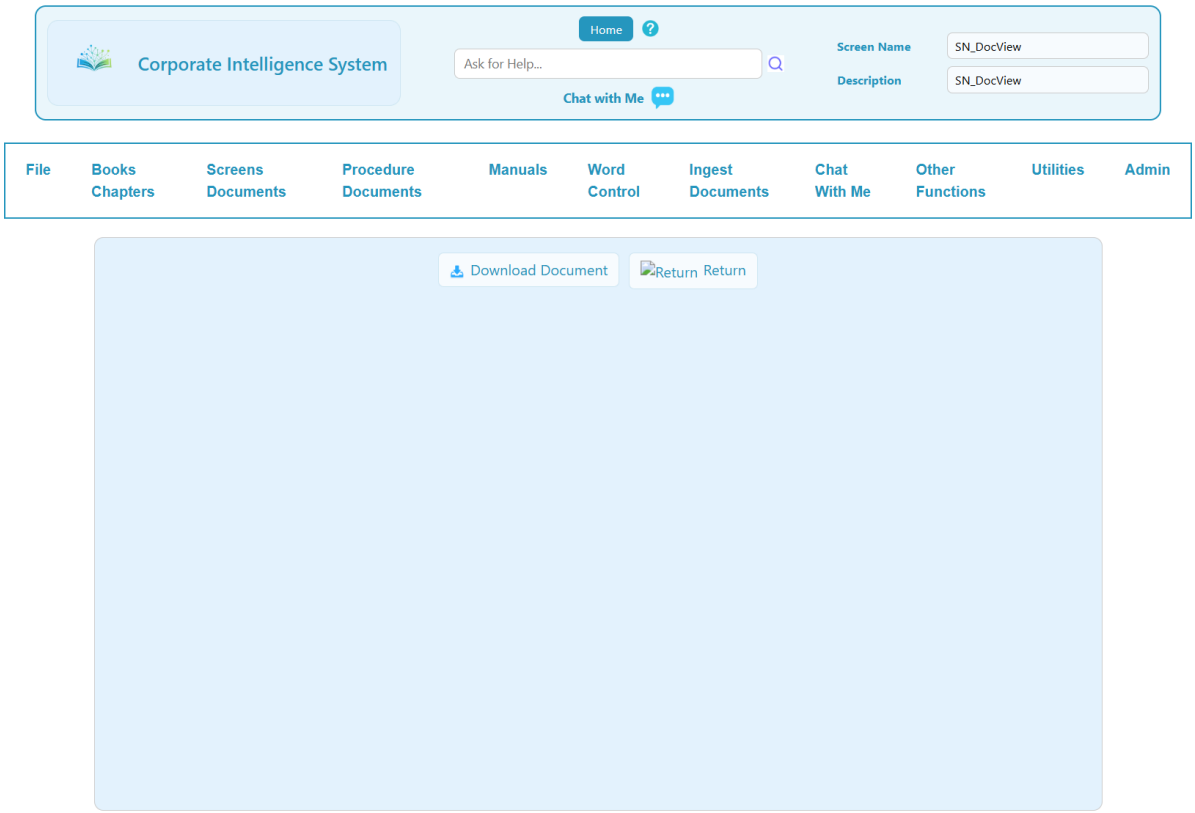


Figure: Document download screen used to retrieve authorized stored files and return to the calling program.

Why This Screen Matters

Search results and AI responses are often more valuable when users can access the original source material.

This screen provides direct retrieval of approved supporting files such as manuals spreadsheets letters PDFs or related documents.

Buttons and Actions

Download starts the actual file download to the user device or browser.

Return sends the user back to the screen that requested the document.

Fields or Settings

Document Name may be displayed to identify the selected file.

File Type may determine whether the browser opens the file or downloads it directly.

Return Link restores the prior navigation path.

Rules and Validations

Only files that exist and are authorized for the current user can be downloaded.

Some file types may open in the browser depending on browser settings.

If the source file has been moved or removed the download may fail.

Downstream Effects

Downloaded files provide users with original evidence supporting search results procedures or AI answers.

Users may save print review or distribute files according to company policy.

Examples

Select a PDF manual from search results and download the original file.

Open a spreadsheet referenced by a retrieved knowledge item.

Return to the prior search screen after reviewing a downloaded document.

Troubleshooting

If the file does not download verify popup blocker and browser download settings.

If an error appears the source file may no longer exist or access may be restricted.

If Return does not navigate correctly reopen the original screen manually.

Security and Access

Downloads should be limited to users with proper permission to access the requested file.

Confidential documents should be handled according to company security policy after download.

100.000 - Managing Books and Chapters

1.000 - Intro To Books Chapters Procedures Documents

Screen | 2026-05-11 00:00:00 BookIntro

001.000 Intro To Books Chapters Procedures Documents

Purpose

This section explains the overall design and purpose of the Books Chapters Procedures and Screen Documents system.

The goal of this architecture is to transform normal help screens procedures uploaded manuals and operational knowledge into a structured searchable and AI enabled documentation environment.

This system is designed to support both traditional manual viewing and modern AI retrieval methods.

HowTheSystemStarted

The original foundation of the system began with security and screen management.

Security Groups were created so application screens and functions could be controlled by user access rights.

Each user could be assigned Read Write or No access along with a Security Level from 1 through 5.

Security Level 1 represents the highest security access.

This allowed the application to control which users could open screens update data or perform administrative actions.

After the security system was completed another requirement became obvious.

Users needed integrated help directly inside the software.

A standard page header was added to the application along with a Help button.

When the Help button is pressed the system opens a modal help window and dynamically loads the help associated with the current screen.

The screen help is tied directly to the program naming convention.

For example the program SN_Book.php uses the screen help name SN_Book.

This allowed every application screen to have its own structured help content.

EvolutionIntoBooksAndChapters

As the help system expanded it became clear that individual help screens alone were not enough for training operational guidance onboarding or large scale documentation.

The system therefore evolved into a complete manual architecture built around Books Chapters Procedures and Screen Documents.

The design intentionally follows the same structure used in professionally written manuals and technical books.

A Book represents the highest level documentation container.

A Chapter represents a major topic area inside the book.

Procedures and Screen Documents represent the actual sections inside the chapter.

In practical terms the relationship can be understood like this.

Book equals the full manual.

Chapter equals a major subject area inside the manual.

Procedure or Screen Document equals an individual section inside that chapter.

This structure allows documentation to be organized logically and displayed in a predictable order.

Chapter numbers and Section numbers are used to control sorting and Table Of Contents generation.

For example a Book may contain a Chapter called Managing Books And Chapters.

Inside that Chapter there may be sections such as Managing Book Titles Managing Chapters Managing Procedures and Managing Screens And Documents.

Those sections are represented by Procedures and Screen Documents.

DifferenceBetweenProceduresAndScreenDocuments

Screen Documents and Procedures are closely related but they are intended for different purposes.

A Screen Document normally explains how a software screen works.

It describes fields buttons processing behavior validations and downstream effects for a specific application screen.

A Procedure normally explains how to perform a business or operational task.

A Procedure may or may not involve a specific screen.

For example a Screen Document may explain how the SN_Book screen operates.

A related Procedure may explain how to create and organize a complete operations manual for a department.

Even though they serve different purposes both are treated as organized sections within the overall book and chapter architecture.

This allows both technical help and operational guidance to exist together in the same documentation environment.

StructuredManualGeneration

The system is capable of generating structured online manuals from the stored documentation records.

The user selects a Book and the system automatically organizes all related Chapters Procedures and Screen Documents into a readable online manual format.

Chapter and Section numbering determine the order in which content appears.

This same structure can also be used to generate downloadable PDF manuals.

The result is that the same stored content can support online viewing printed manuals keyword searching and AI retrieval without requiring duplicate maintenance.

The documentation is maintained once but can be consumed in multiple different ways.

InvertedIndexSearching

The system includes an inverted index search engine.

This search engine functions similarly to a traditional keyword search system.

When documentation is indexed the system stores searchable references to keywords phrases headings and related metadata.

Users can then search for terms and quickly locate matching sections inside Procedures Screen Documents and other indexed documentation.

This type of search is extremely useful when the user already knows the terms they are looking for.

For example a user may search for phrases such as Vendor Setup Tenant Charges Security Groups or Chat Agent.

The search engine returns matching sections along with references to the related Book Chapter and Section.

This provides a fast and highly structured method of locating documentation.

AIChatRetrieval

In addition to keyword searching the system also supports AI retrieval.

Procedures Screen Documents and uploaded files can be parsed chunked and vectored for semantic retrieval.

This means the AI Chat Agent can respond based on meaning and context instead of only exact keywords.

The system converts documentation into chunks of retrievable knowledge.

Vectors are then created so related concepts can be matched semantically.

This allows the AI Chat Agent to answer questions even when the exact wording is not present in the

original document.

The combination of inverted index searching and AI semantic retrieval gives the system two very different but complementary methods of finding information.

Keyword search is precise and fast.

AI retrieval is conversational and context aware.

UploadedDocumentsVersusSystemCreatedBooks

The system supports both uploaded documentation and manually created online books.

Uploaded documents are useful when a company already has existing manuals policies spreadsheets procedures or reference material.

Those files can be uploaded parsed chunked vectored and searched by the AI system.

However uploaded documents are often large highly technical and difficult for normal users to understand.

System created books provide a different advantage.

Books Chapters Procedures and Screen Documents created directly inside the system allow documentation to be written specifically for the target audience.

The content can be organized into logical chapters readable sections and controlled numbering structures.

The wording can also be simplified for non technical users.

This means uploaded documents and system created books are not competing features.

They are complementary features that solve different problems.

HumanResourcesExample

A Human Resources department provides a good example of why both approaches are important.

An HR department may already have a large official HR policy manual written by attorneys compliance officers or corporate management.

That document may contain detailed legal terminology technical compliance language and formal corporate policy wording.

The company can upload that official HR manual into the AI system for parsing chunking vectoring and AI retrieval.

That uploaded document becomes part of the organization's searchable AI knowledge base.

However many employees may not understand the highly technical wording used inside the official manual.

The same HR department can therefore create a separate Employee Handbook directly inside the Books Chapters Procedures and Screen Documents system.

The Employee Handbook can explain the same operational concepts using simpler language intended for normal employees.

The handbook can contain chapters such as Vacation Policy Attendance Dress Code Benefits Workplace Conduct and Employee Onboarding.

Employees can then interact with that handbook in multiple ways.

They can browse the handbook online.

They can search it using keyword search.

They can download it as a PDF manual.

They can also ask questions through the AI Chat Agent using normal conversational language.

This creates two layers of organizational knowledge.

The official uploaded policy manual remains available for technical and compliance reference.

The employee focused handbook provides simplified operational guidance designed specifically for daily use.

ClientCreatedBooks

Clients are not limited to using the system only for software help.

Organizations can create unlimited Books Chapters Procedures and Screen Documents for nearly any business area.

Departments such as Human Resources Accounting Operations Compliance Safety Training Administration and Customer Service can all maintain their own structured knowledge bases.

Each department can organize information according to its own operational requirements.

This allows the system to function as both a documentation platform and an organizational knowledge platform.

OperatingManualProtection

The Operating Manual is considered protected system documentation.

The Operating Manual normally contains core software documentation administrative guidance and platform operational standards.

Because of this only authorized system administrators may modify protected Operating Manual content.

Client created books are handled differently.

Clients may create and maintain their own books according to their assigned security permissions.

This separation protects the core system documentation while still allowing clients to build their own organizational manuals and AI knowledge structures.

Conclusion

The Books Chapters Procedures and Screen Documents architecture transforms documentation into a structured operational knowledge system.

The same information can support online manuals PDF generation keyword searching and AI conversational retrieval.

The architecture allows organizations to combine formal uploaded documentation with readable structured online manuals designed specifically for their users.

The result is a documentation environment that supports traditional manuals fast search retrieval and AI driven knowledge access from the same underlying content structure.

30.000 - Managing Procedurs

Screen | 2026-05-11 00:00:00 SN_Procedures

300.000 Managing Procedures

Purpose

Use this screen to manage procedure groups, maintain procedure records, and prepare procedure help content for AI document processing.

This screen lets you organize procedures by group, search for procedures within a selected group, open an existing procedure for review or update, add a new procedure, save procedure detail information, parse the procedure text, commit chunk records, and build vectors for AI retrieval.

This screen supports both procedure administration and AI-ready help document preparation.

The left side of the screen is used for procedure groups and procedure list management.

The detail area is used to maintain the selected procedure and its help content.

Processing

This screen is organized around procedure groups and the procedures that belong to them.

The user first selects a book.

After a book is selected, the list of procedure groups for that book becomes available.

You can select an existing procedure group to view all procedures under that group.

You can also add a new procedure group for the selected book.

Once a procedure group is selected, the list of all procedures for that group appears.

You can search within that procedure list to narrow the displayed results.

You can open an existing procedure from the list or create a new one with Add New.

When a procedure is opened or added, the detail section becomes available.

The detail section is where the procedure name, category, description, book assignment, chapter, section, audience, help mode, and procedure text are maintained.

A book must be selected before procedure groups can be worked normally.

A procedure group should be selected before adding or viewing a procedure.

Chapter and section values may be added later if they are not yet known when the procedure is first created.

All fields on the screen should be completed carefully because they affect both manual organization and AI retrieval quality.

After the detail information is saved, the system can parse the procedure text.

After parsing completes successfully, Chunk can be run to write the document, source, and chunk records.

After chunking completes successfully, Vector can be run to build semantic retrieval vectors for the procedure content.

WhereToFind

Main Menu to Manuals and Searches to Procedures.

Images

Figure: Main Procedure Management Screen.

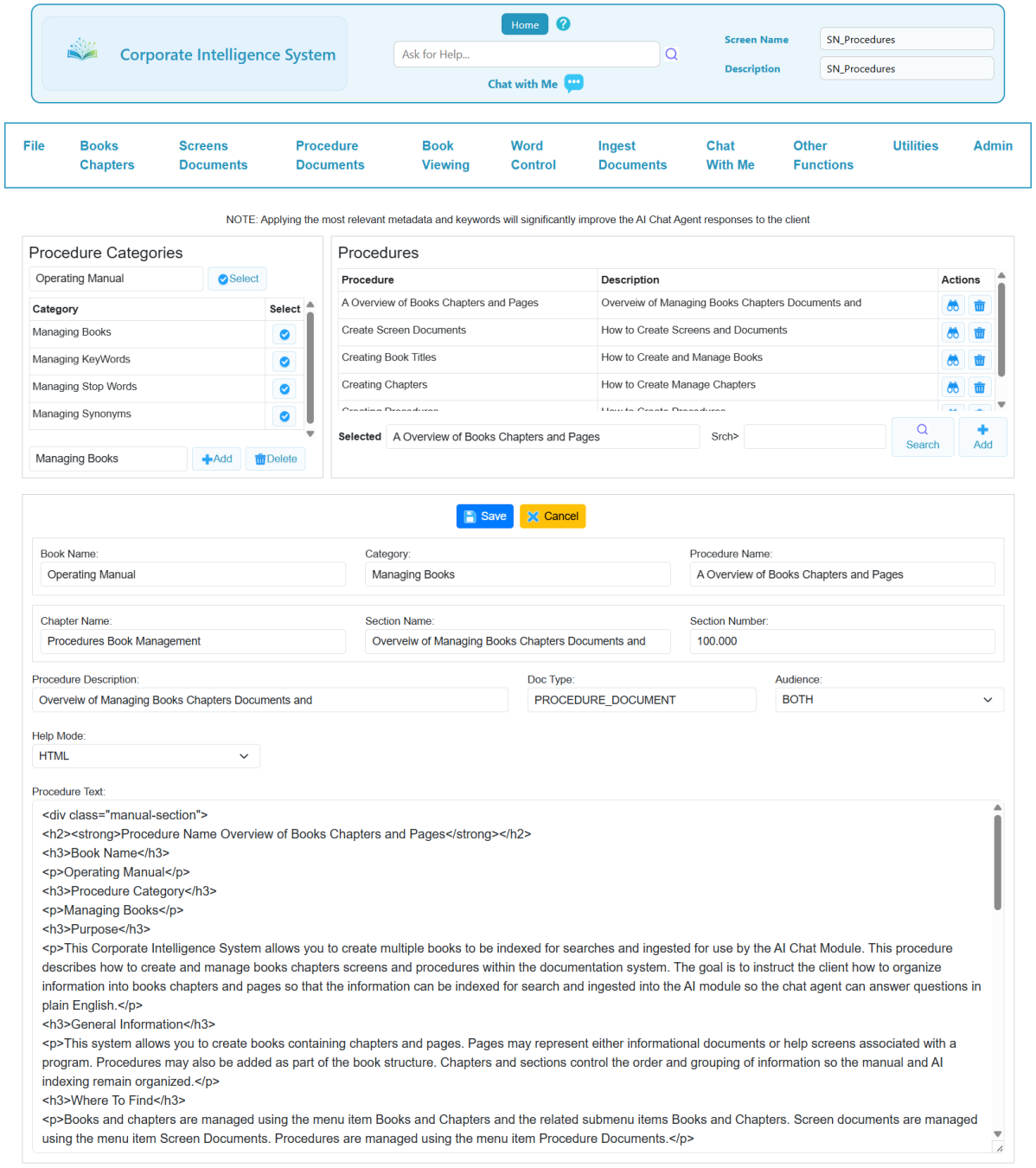


Figure: Procedure Detail Area.

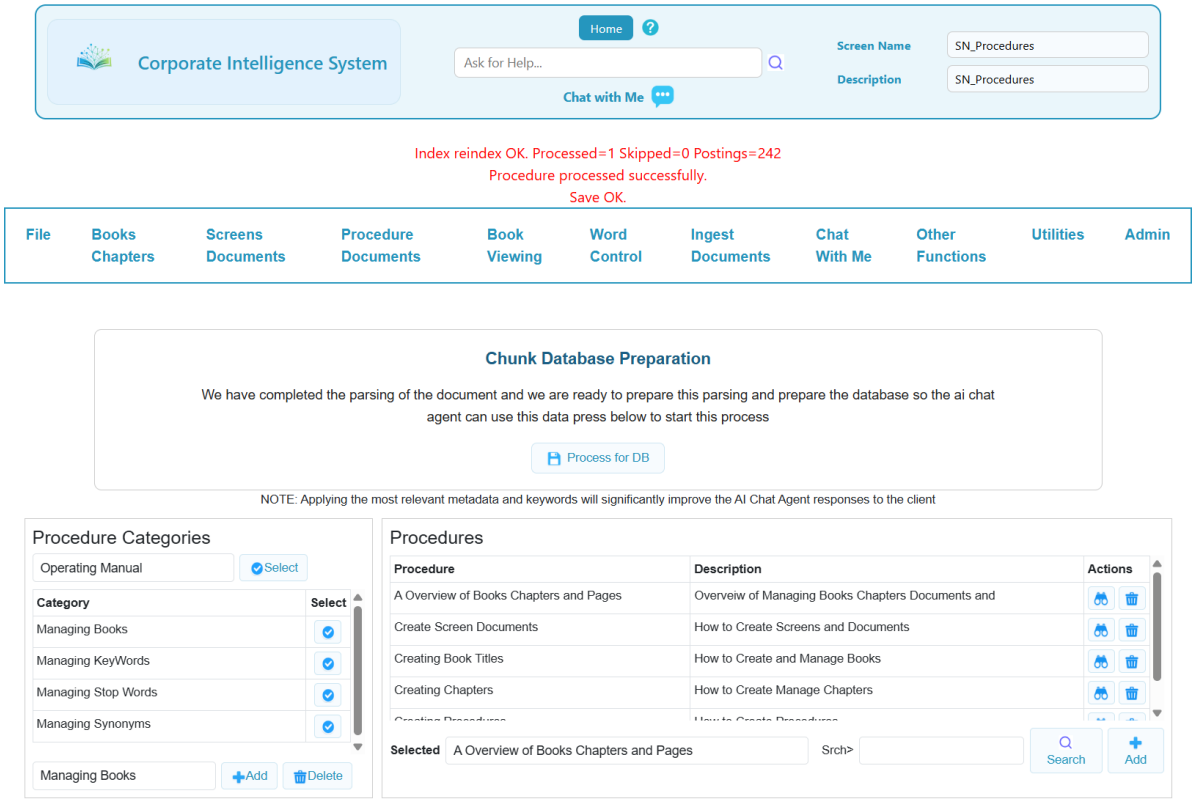


Figure: Chunk Processing for Procedure Help.

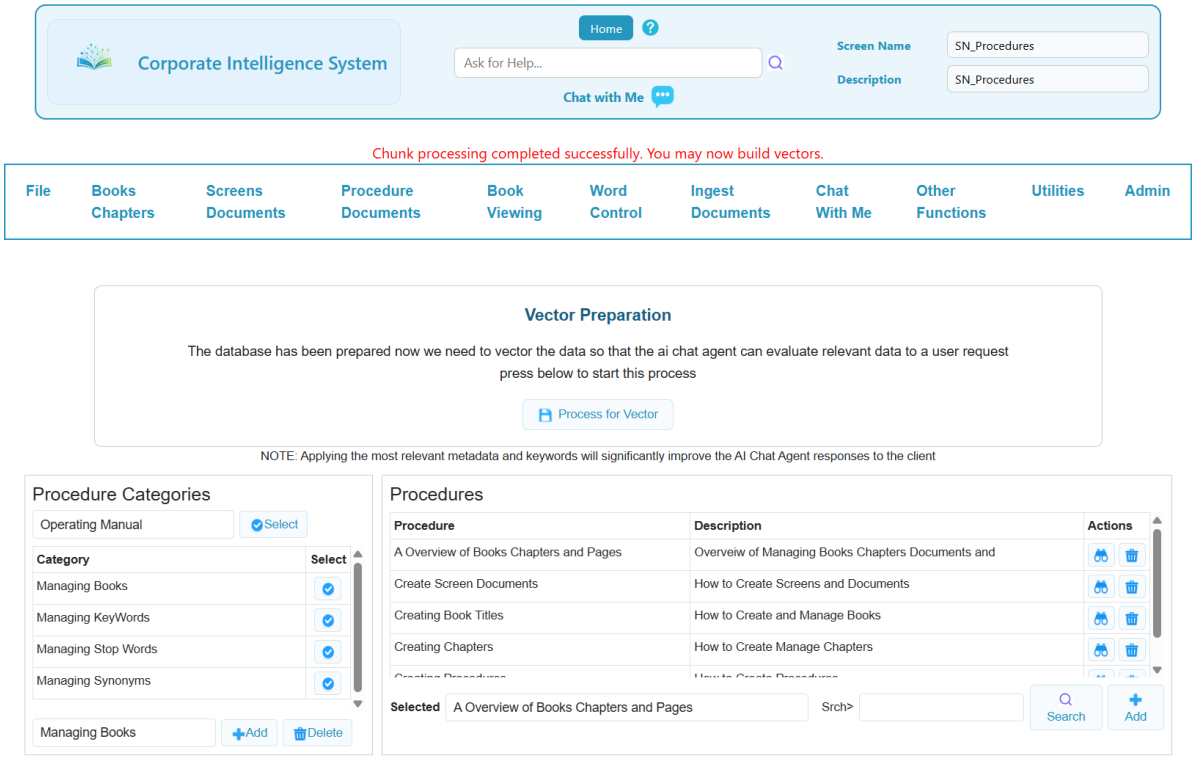


Figure: Vector Processing for Procedure Help.

ButtonsAndActions

Select Book loads the selected book context and displays the related procedure groups.

Category Select opens the selected procedure group and displays the procedures under that group.

Category Add creates a new procedure group for the selected book.

Category Delete removes the selected procedure group and its related procedures.

Procedure Search filters the procedure list based on the search text entered by the user.

Add New opens a blank detail record so a new procedure can be created under the selected group.

View opens the selected procedure in the detail area for review or update.

Delete removes the selected procedure record and related indexed or ingest-linked procedure document content.

Save validates the detail area, saves the procedure record, and starts parse processing for the procedure text.

Clear clears the detail fields and hides the detail display.

Chunk writes the parsed procedure content into document, source, and chunk database rows.

Vector builds semantic vectors from the procedure chunks for AI retrieval.

FieldsOrSettings

Book Name identifies the book where the procedure help should be organized.

Book Name must be selected before procedure groups and procedures can be worked normally.

Selected Procedure Category identifies the current procedure group chosen from the group list.

Procedure Category identifies the group under which the procedure is classified.

Procedure Name identifies the specific procedure and should be short, clear, and searchable.

Selected Procedure Name identifies the procedure currently chosen from the procedure list.

Procedure Search Text limits the displayed procedure list to matching procedures.

Procedure Description is one of the most important fields on the screen and should explain clearly what the procedure is for.

Doc Type identifies the type of stored AI document and for this screen should normally remain aligned with procedure document processing.

Audience identifies who the help is intended for.

Help Mode identifies how the help content is being maintained for the procedure.

Chapter Name identifies the chapter where the procedure help belongs within the selected book.

Section Number identifies the section number used to organize the help content.

Section Name identifies the section title used with the section number.

Procedure Text contains the actual help or procedure content that will be parsed, chunked, and vectorized.

Procedure Text should be written clearly and completely because it becomes the source text for downstream AI retrieval.

If chapter and section are not known yet, you may still create the procedure under the selected book and group and complete chapter and section later.

A strong description and strong procedure text improve later search quality and AI answers.

KeysAndScope

This screen works at the procedure-document level.

Each saved row represents one managed procedure and its associated help content.

Procedure records are organized under a selected book and procedure group.

The same procedure record can later support indexing, parsing, chunking, and vector generation.

This screen is intended for controlled procedure help content rather than freeform uploaded documents.

The selected book and selected procedure group determine the main scope for procedure display and organization.

RulesAndValidations

A book should exist before this screen is used.

If no books exist, a book must be created first before normal procedure work can continue.

A book must be selected before the user should expect to work with procedure groups.

A procedure group should be selected before the user should expect to work with the procedure list.

Search works within the currently selected procedure group.

Procedure detail fields should be completed carefully before Save is pressed.

Save should be performed before Chunk.

Chunk should be performed only after parse processing is successful.

Vector should be performed only after chunk processing is successful.

If a hard error occurs during save, parse, chunk, or vector, correct the data and restart from the appropriate earlier step.

DownstreamEffects

Saving a procedure record stores or updates the procedure definition and its help content.

Saving also starts the parse process for the procedure text.

Chunk creates the related AI document, source, and chunk rows.

Vector adds semantic retrieval support so the Chat Agent can find the procedure help by related meaning and not only exact matching words.

Deleting a procedure can also remove related indexed or ingest-linked procedure content tied to that procedure document.

Deleting a procedure group also removes the procedures stored under that group.

Examples

Example 1: Select a book, choose a procedure group, search for procedures beginning with a partial name, and open one procedure from the filtered list for review.

Example 2: Select a book, add a new procedure group, select that group, press Add New, enter the procedure information, and save the new procedure.

Example 3: Open an existing procedure, improve the procedure description and text, save it again, then rerun chunk and vector so AI retrieval reflects the updated procedure content.

Example 4: Select a procedure group and view all procedures under it to review what content already exists before adding another one.

Troubleshooting

If no procedure groups appear, verify that a valid book has been selected.

If no procedure list appears, verify that a procedure group has been selected.

If search returns no results, clear or broaden the search text and search again.

If Save fails, review the detail fields and complete missing or weak values before retrying.

If parse does not start correctly, review the procedure text and detail values, then save again.

If Chunk fails, do not continue to Vector until the chunk issue is corrected.

If Vector fails, the procedure data may already be saved and chunked, but semantic retrieval support is not yet complete.

If the user is unsure how to draft the procedure help text, it can sometimes be easier to use a chat agent to create the first draft by sending the program, an example help screen, and general guidance for the desired result.

SecurityAndAccess

This screen is controlled by program security and update access.

Read access is required to open and review the screen.

Write access is required to add or delete procedure groups, add procedures, update procedures, delete procedures, save help content, run chunk processing, and run vector processing.

Users without sufficient rights may be able to view the screen but may not be allowed to perform update actions.

100.000 - Managing Book Titles

Screen | 2026-05-11 00:00:00 `SN_Book`

100.000 Managing Book Titles

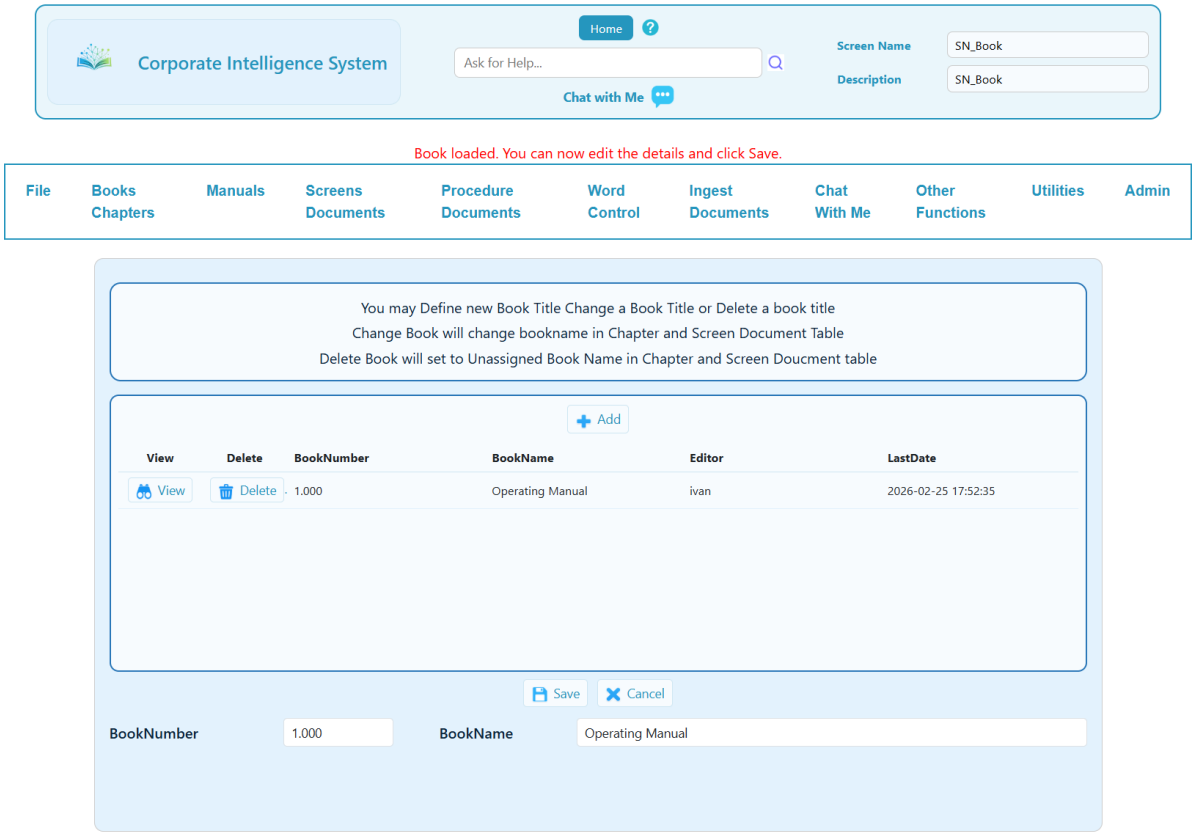
Purpose

This screen is used to create and maintain book titles that organize chapters screens and procedures within the manual system.

WhereToFind

Open the Books and Chapters menu item.

Images



SN_Book.png

ButtonsAndActions

Add: Clears the detail fields so you can enter a new book title.

Save: Saves the book title so it is available when creating chapters screens and procedures.

Delete: Removes the selected book title.

Search: Filters or locates existing book titles in the list.

Cancel: Cancels the current edit and restores the prior values.

FieldsOrSettings

BookName: The name of the book title to be used as the top level documentation container.

KeysAndScope

Scope: A book title is the top level container for all chapters screens and procedures.

Key: BookName is the identifying value used to select and manage the book record.

RulesAndValidations

A book title must exist before any chapters screens or procedures can be created.

BookName is required to add or save a book title.

DownstreamEffects

After a book title is saved it becomes selectable on chapter screen and procedure setup screens.

Chapters are created under the selected book and then screens and procedures are organized under those chapters.

Examples

Create a book titled Operating Manual then add chapters such as System Overview Accounting Functions or Administration and organize related screens and procedures under those chapters.

Troubleshooting

If chapters screens or procedures cannot be added confirm that a book title has been created first.

If new documentation is being added under the wrong area confirm the correct book title is selected.

SecurityAndAccess

Access to add update or delete book titles is controlled by your security group permissions for manual administration.

200.000 - Managing Chapters

Screen | 2026-05-11 00:00:00 SN_Chapter

200.000 Managing Chapters

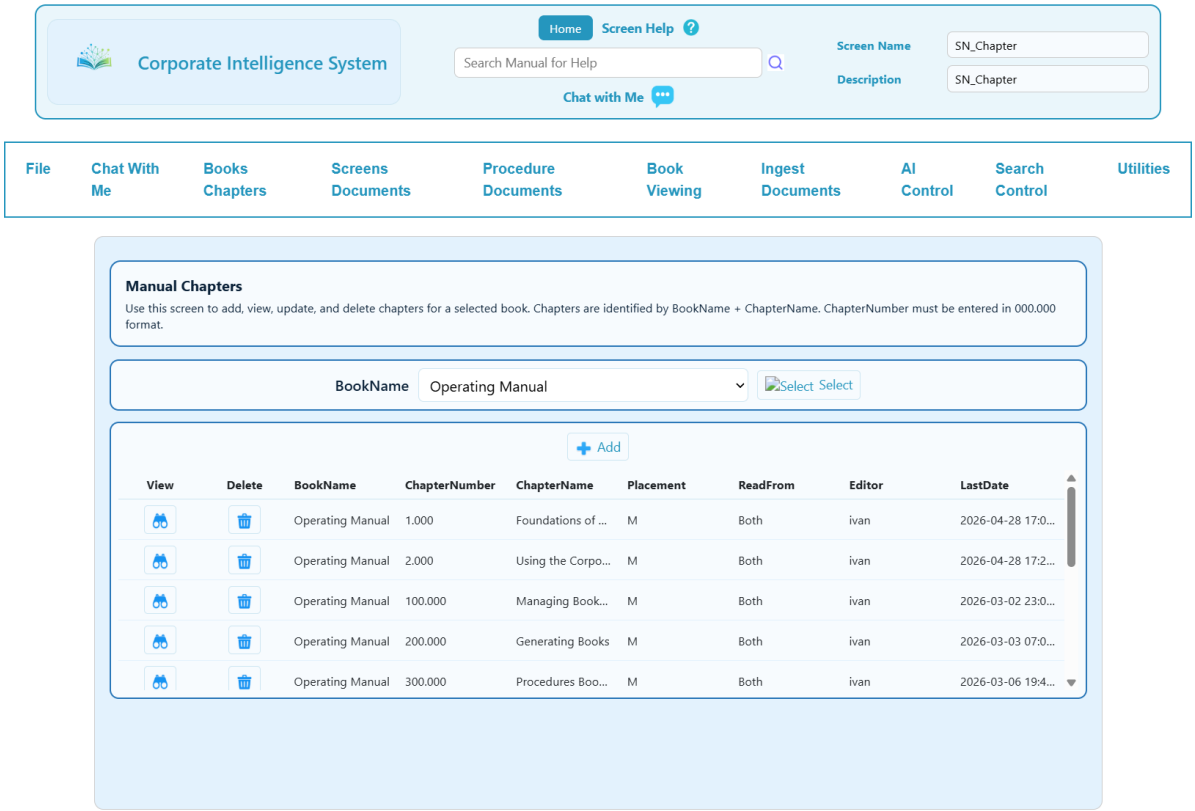
Purpose

This screen is used to create and manage chapters within a selected book so documentation is organized in the correct order for manual display search indexing and AI ingestion.

WhereToFind

Open the Books and Chapters menu item and select the Chapter option.

Images



SN_Chapter.png

ButtonsAndActions

Select: Loads the chapters for the selected book.

Add: Clears the detail fields to create a new chapter under the selected book.

Save: Saves the chapter and makes it available for associating screen documents and procedures.

Delete: Removes the selected chapter.

Cancel: Cancels the current edit and restores prior values.

FieldsOrSettings

SelectedBookName: Selects the book whose chapters will be displayed and maintained. The chapter grid is not displayed until a valid book is selected.

BookName: Identifies the book that the chapter belongs to and must exist before creating a chapter.

ChapterNumber: Determines the display order of the chapter within the manual.

ChapterName: Describes the subject matter of the chapter.

Placement: Indicates where the chapter appears in the manual F for front M for middle or A for appendix.

ReadFromSwitch: Determines whether the chapter includes screens procedures or both and is normally set to BOTH.

KeysAndScope

Scope: Each chapter belongs to a single selected book and groups related screens and procedures.

Key: The combination of BookName and ChapterNumber uniquely identifies the chapter.

RulesAndValidations

A book title must exist and be selected before chapters are displayed or maintained.

The default book selection is Unassigned. When Unassigned is selected the chapter grid is not displayed.

ChapterNumber controls order and should follow the intended numbering structure.

Placement must be F M or A to control manual positioning.

DownstreamEffects

After saving the chapter screen documents and procedures can be assigned to it.

The chapter structure affects manual display order search grouping and AI ingestion hierarchy.

Examples

Select the Operating Manual book click Select and add chapter number 100 named System Overview placed in the middle section then create related screens and procedures under that chapter.

Troubleshooting

If chapters do not appear confirm that a book has been selected and that the selected value is not Unassigned.

If screens or procedures cannot be assigned verify the chapter was saved successfully under the correct selected book.

SecurityAndAccess

Access to add update or delete chapters is controlled by security group permissions for manual administration.

The Operating Manual book has additional protection. Only Ivan or Alvaro may add modify or delete chapters for the Operating Manual.

400.000 - Managing Documents and Screens

Screen | 2026-05-11 00:00:00 SN_Screen

400.000 Managing Screens and Documents

Purpose

Use this screen to manage screen-level help documents and related AI document content for application screens.

This screen lets you assign an available security group code to a screen, select the book where the screen belongs, search for existing screens, open a screen for review or update, add a new screen, save screen detail information, parse the help content, commit chunk records, and build vectors for AI retrieval.

This screen supports both screen administration and AI-ready document preparation for screen help content.

The left side of the screen is used for security group assignment management.

The right side of the screen is used for book selection, screen searching, screen selection, and detail maintenance.

Processing

This screen has two major work areas.

The first area is the Security Group area on the left side.

The second area is the Screen and Document area on the right side.

In the Security Group area, the system displays available security groups so an unassigned group can be named and reserved for a screen.

You may view a group from the list and, if it is still unassigned, update it to the group name you want to use.

If a group code is already assigned, it should not be changed from this screen.

In the Screen and Document area, you must first select a book.

After a book is selected, the system displays the screens that belong to that book.

You can optionally enter search text such as SN_IN and press Search to limit the displayed screen list.

You can then open an existing screen from the list or start a new one with Add New.

When a screen is opened or added, the detail section becomes available.

The detail section is where the screen identity, book assignment, chapter, section, description, audience, help mode, and screen help content are maintained.

A book must be selected before normal screen work can proceed.

Chapter and section values may be added later if they are not yet known when the screen is first created.

All fields on the screen should be completed carefully because they affect both manual organization and AI retrieval quality.

After the detail information is saved, the system can parse the help content.

After parsing completes successfully, Chunk can be run to write the document, source, and chunk records.

After chunking completes successfully, Vector can be run to build semantic retrieval vectors for the screen help content.

WhereToFind

Main Menu to Manuals and Searches to Screens.

Images

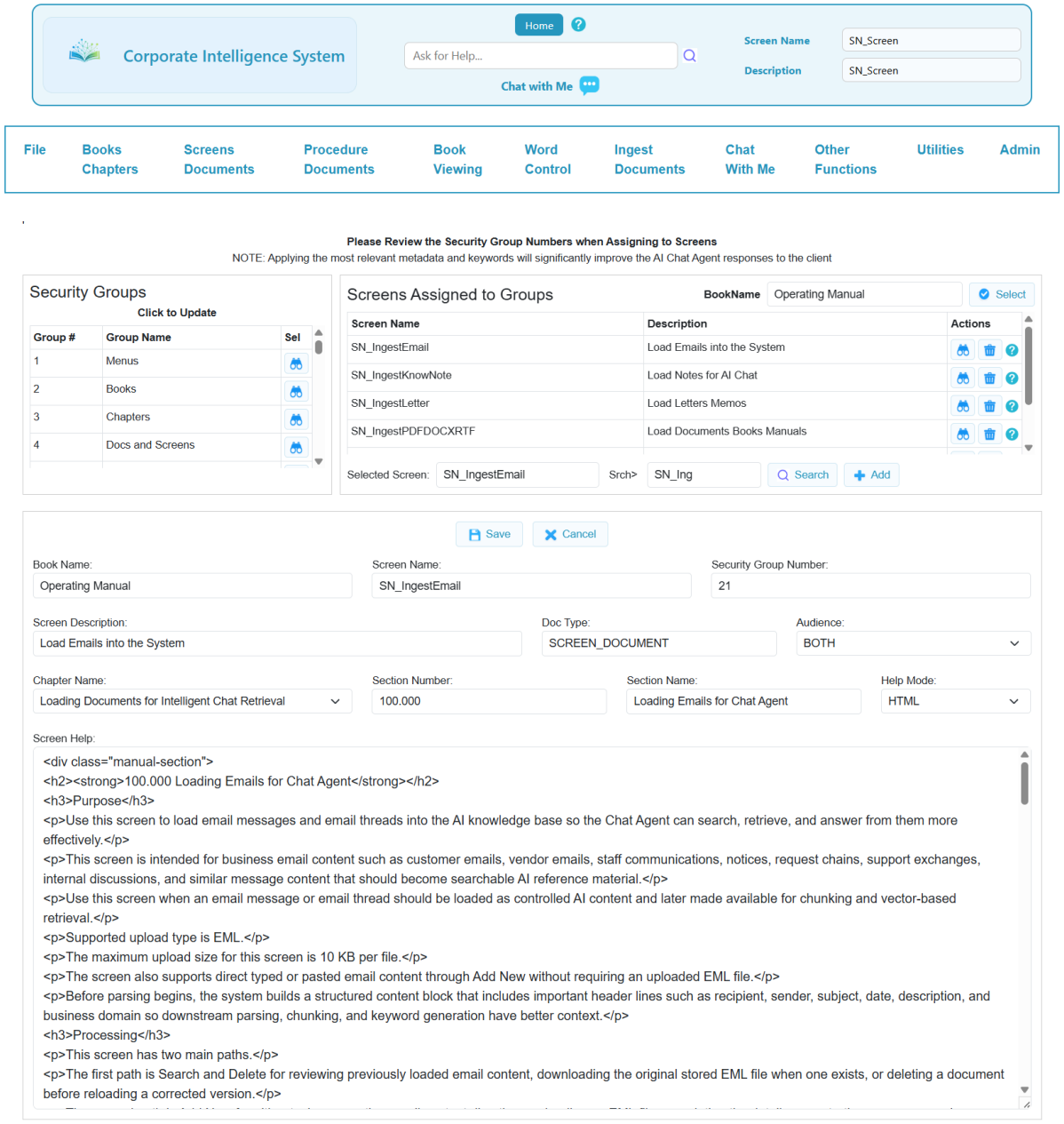


Figure: Screen Detail Area.

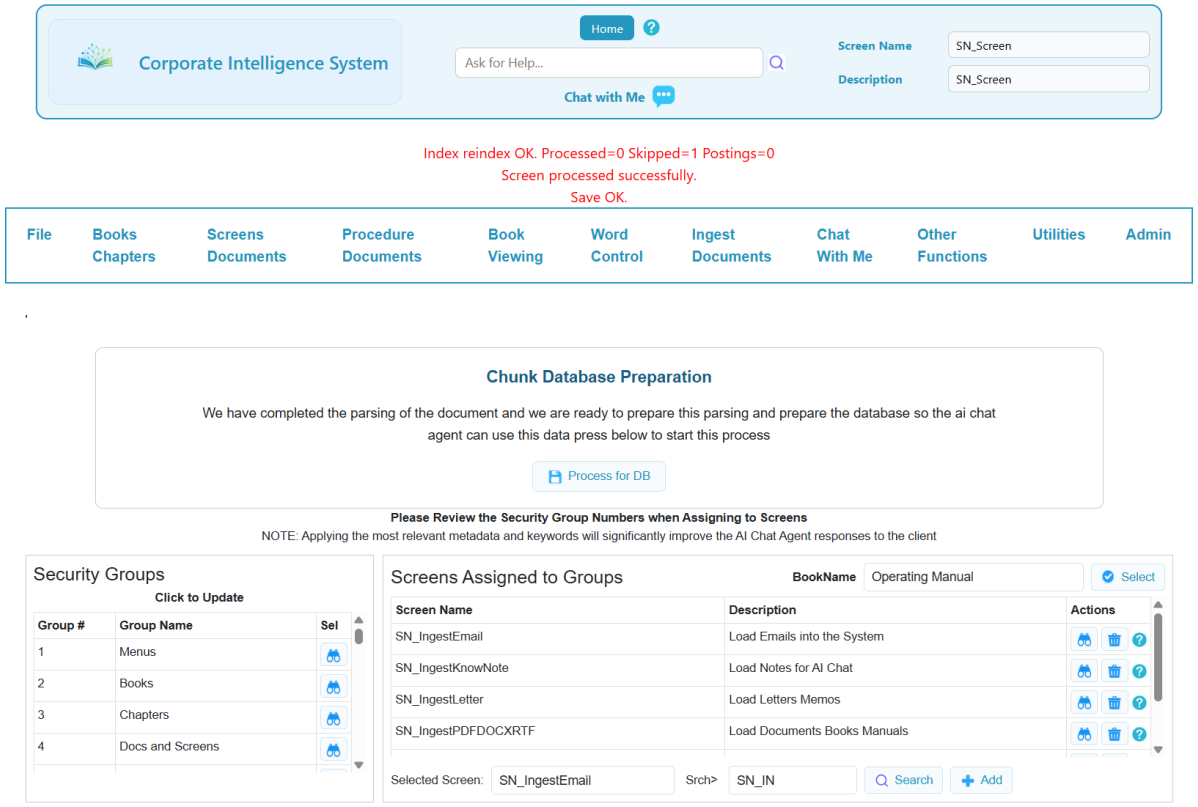


Figure: Chunk Processing for Screen Help.

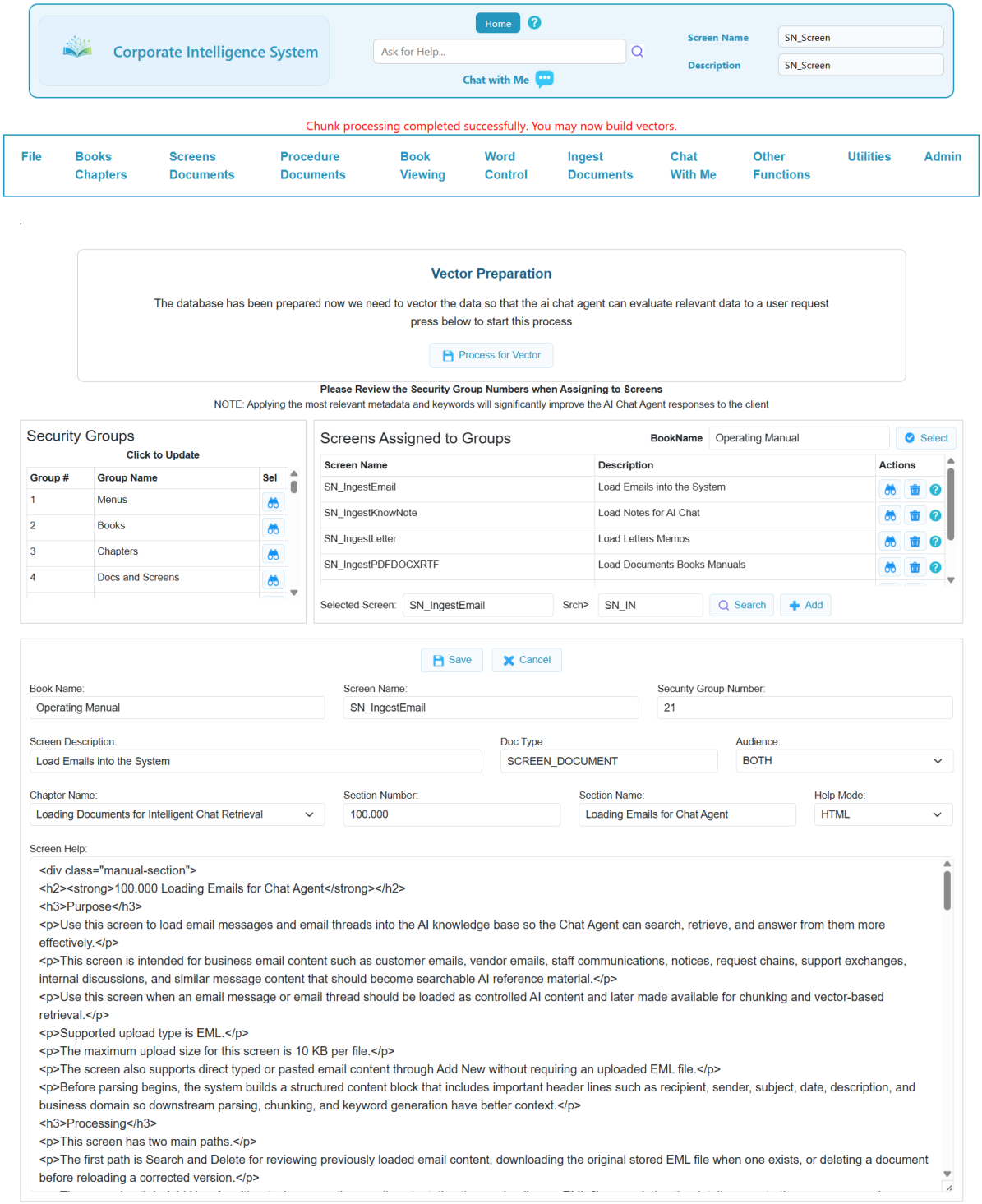


Figure: Vector Processing for Screen Help.

ButtonsAndActions

Select Book loads the selected book context and displays the related screen list.

Search filters the screen list based on the search text entered by the user.

Add New opens a blank detail record so a new screen can be created.

View opens the selected screen in the detail area for review or update.

Delete removes the selected screen record and related indexed or ingest-linked screen document content.

Save validates the detail area, saves the screen record, and starts parse processing for the screen help content.

Clear clears the detail fields and hides the detail display.

Chunk writes the parsed help content into document, source, and chunk database rows.

Vector builds semantic vectors from the screen chunks for AI retrieval.

Group Select opens an available security group so its name can be assigned when the group is currently unassigned.

Group Save saves the new group name for the selected unassigned security group.

Group Cancel cancels the group assignment edit and clears the temporary group selection.

FieldsOrSettings

Security Group Number identifies the security group code tied to the screen.

Selected Group Number identifies the specific security group currently being edited in the left-side group area.

Selected Group Name is the editable group name for an unassigned security group code.

Book Name identifies the book where the screen help should be organized.

Book Name must be selected before the screen list can be worked normally.

Screen Name is the program or screen identifier and should match the application screen naming standard.

Selected Screen Name identifies the screen currently chosen from the list.

Search Text limits the displayed screen list to matching screen names or related values.

Chapter Name identifies the chapter where the screen help belongs within the selected book.

Section Number identifies the section number used to organize the help content.

Section Name identifies the section title used with the section number.

Screen Description is one of the most important fields on the screen and should explain clearly what the screen is for.

Doc Type identifies the type of stored AI document and for this screen should normally remain aligned with screen document processing.

Audience identifies who the help is intended for.

Help Mode identifies how the help content is being maintained for the screen.

Screen Help contains the actual help content that will be parsed, chunked, and vectorized.

Screen Help should be written clearly and completely because it becomes the source text for downstream AI retrieval.

A strong description and strong help content improve later search quality and AI answers.

If chapter and section are not known yet, you may still create the screen under the selected book and complete chapter and section later.

KeysAndScope

This screen works at the screen-document level.

Each saved row represents one managed application screen and its associated help content.

The same screen record can later support indexing, parsing, chunking, and vector generation.

This screen is intended for controlled screen help content rather than freeform uploaded documents.

The selected book determines the main scope for screen display and organization.

RulesAndValidations

A book should exist before this screen is used.

If no books exist, a book must be created first before normal screen work can continue.

A book must be selected before the user should expect to work with the screen list.

Search works within the currently selected book context.

Only unassigned security group codes should be renamed in the group area.

If a security group code is already assigned, it should not be changed from this screen.

Screen detail fields should be completed carefully before Save is pressed.

Save should be performed before Chunk.

Chunk should be performed only after parse processing is successful.

Vector should be performed only after chunk processing is successful.

If a hard error occurs during save, parse, chunk, or vector, correct the data and restart from the appropriate earlier step.

DownstreamEffects

Saving a screen record stores or updates the screen definition and its help content.

Saving also starts the parse process for the screen help content.

Chunk creates the related AI document, source, and chunk rows.

Vector adds semantic retrieval support so the Chat Agent can find the screen help by related meaning and not only exact matching words.

Deleting a screen can also remove related indexed or ingest-linked screen content tied to that screen document.

Examples

Example 1: Select a book, search for screens beginning with SN_IN, and open one screen from the filtered list for review.

Example 2: Select a book, press Add New, enter the screen name and description, leave chapter and section for later, save the record, then continue with chunk and vector.

Example 3: Select an unassigned security group on the left side, assign a meaningful group name, and save it for later use with a screen.

Example 4: Open an existing screen, improve the help content, save it again, then rerun chunk and vector so AI retrieval reflects the updated help text.

Troubleshooting

If no screen list appears, verify that a valid book has been selected.

If the selected book is blank or unassigned, the grid may remain hidden.

If search returns no results, clear or broaden the search text and search again.

If a group cannot be changed, it is likely already assigned and is not eligible for rename from this screen.

If Save fails, review the detail fields and complete missing or weak values before retrying.

If parse does not start correctly, review the screen help content and detail values, then save again.

If Chunk fails, do not continue to Vector until the chunk issue is corrected.

If Vector fails, the screen data may already be saved and chunked, but semantic retrieval support is not yet complete.

If the user is unsure how to draft the help text, it can sometimes be easier to use a chat agent to create the first draft by sending the program, an example help screen, and general guidance for the desired result.

SecurityAndAccess

This screen is controlled by program security and update access.

Read access is required to open and review the screen.

Write access is required to assign group names, add screens, update screens, delete screens, save help content, run chunk processing, and run vector processing.

Users without sufficient rights may be able to view the screen but may not be allowed to perform update actions.

200.000 - Generating Books

100.000 - Generate a Book to a PDF

Screen | 2026-05-11 00:00:00 SN_ManualGen

100.000 Generate a Book to a PDF

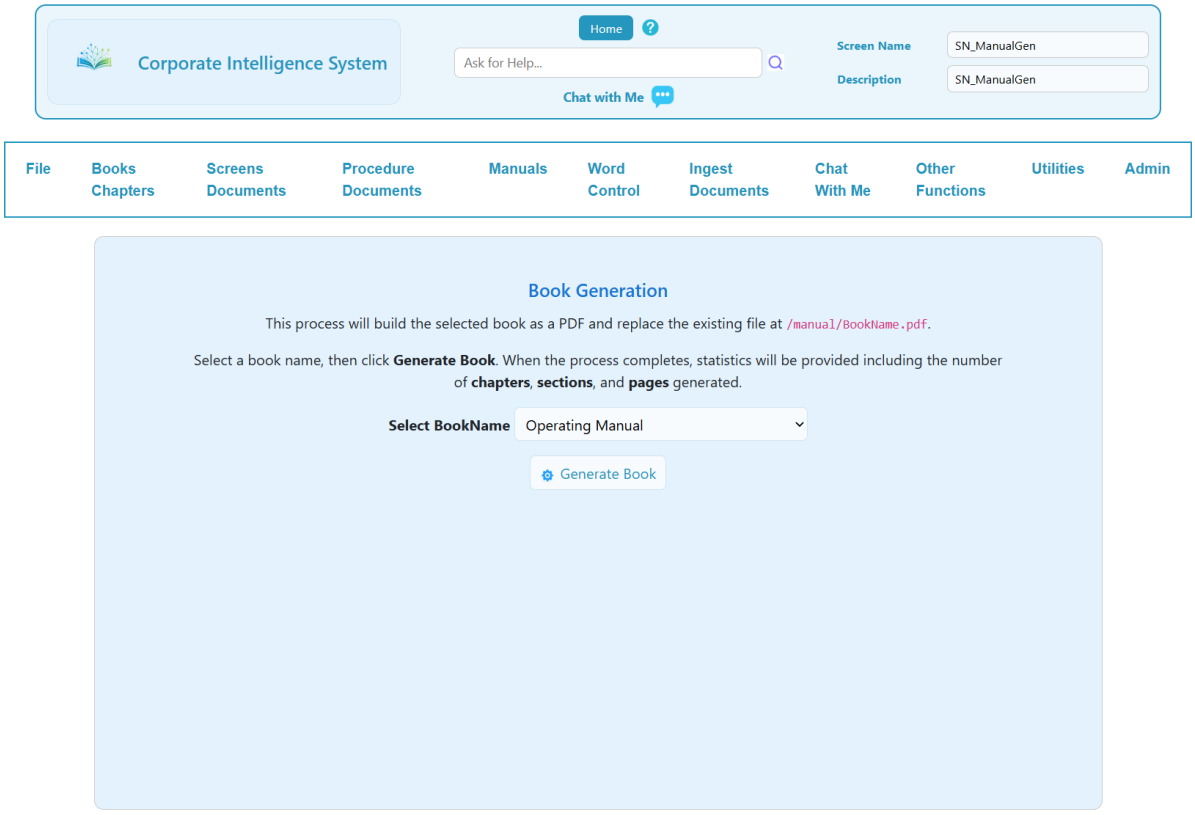
Purpose

This screen will allow you to generate a book in pdf format. You must first select a book before generating it.

WhereToFind

You may invoke this screen from the Manuals group in the main menu bar and select Generate Manual

Images



h3>ButtonsAndActions

The Generate Book button will generate the requested book

Once the book is generated a download button will appear that will transfer you to the document viewer for document download

200.000 - Viewing the Book Online

Screen | 2026-05-11 00:00:00 SN_ManualOnline

200.000 Viewing the Book Online

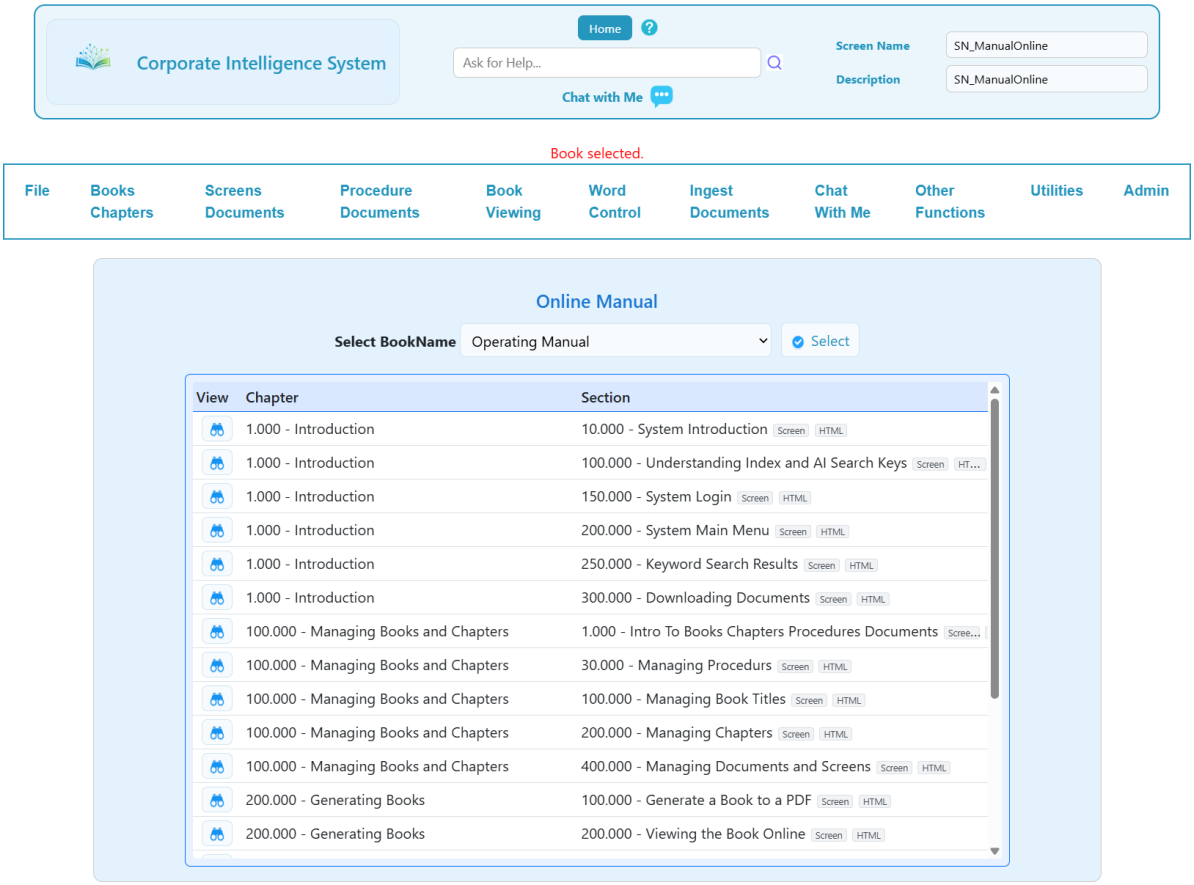
Purpose

This function allows you to view a book table of contents online. First select the bookname from the dropdown and press select,

WhereToFind

This function is listed under Book Viewing on the main menu bar and select Online Book

Images



h3>ButtonsAndActions

Select the book name from the dropdown

Select the book name from the dropdown

FieldsOrSettings
KeysAndScope
RulesAndValidations
DownstreamEffects
Examples
Troubleshooting
SecurityAndAccess

250.000 - Viewing Books Online

Screen | 2026-05-11 00:00:00 SN_ManualOnlineView

250.000 Viewing Books Online

Purpose

This screen will show you a selected section of the book that you selected on the View Online Book

WhereToFind

This screen is automatically invoked from the View Online Book

Images

300.000 - Downloading Books

Screen | 2026-05-11 00:00:00 SN_ManualDownload

120.000 Downloading Books

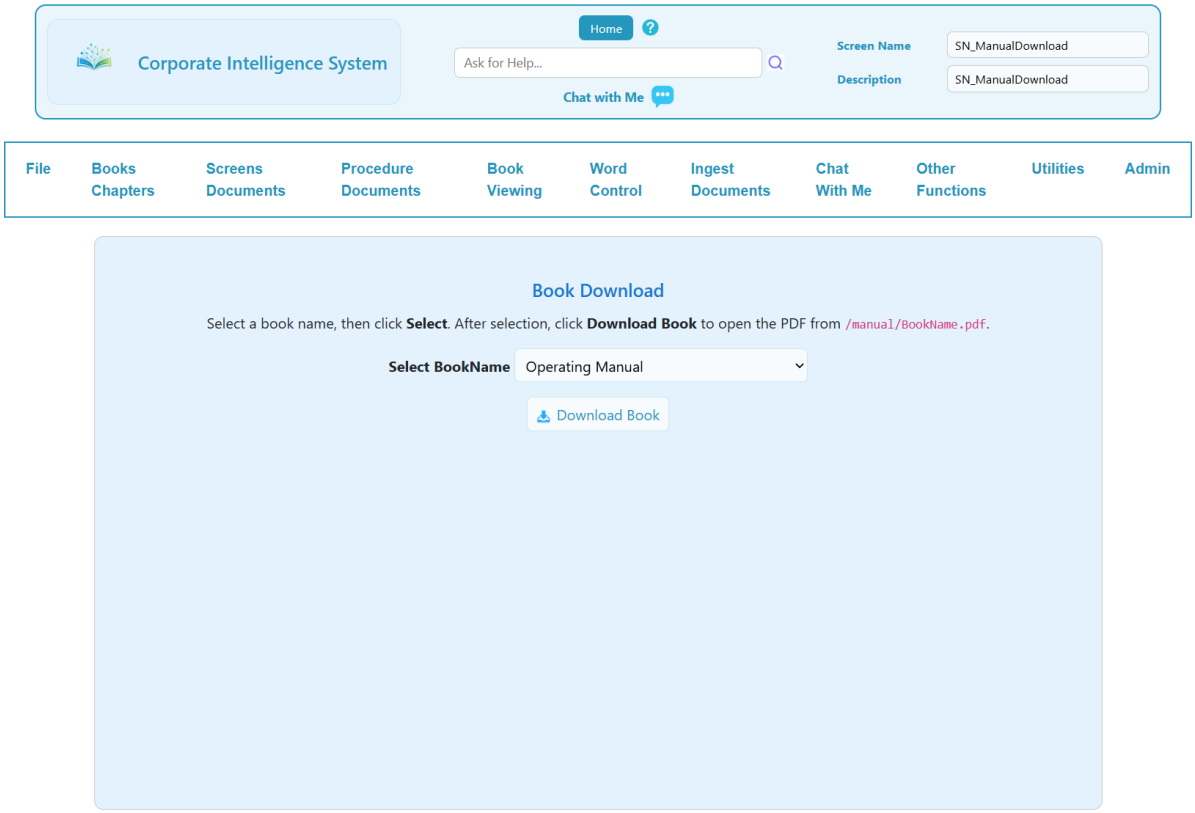
Purpose

This funtion will allow you to select and download a book

WhereToFind

Your can find this function under View Books in the main menu bar and select Download Book

Images



h3>ButtonsAndActions

Select a Book Name and then press the download button

DownstreamEffects

This program will transfer you to the download document viewer

300.000 - Procedures Book Management

100.000 - Overveiw of Managing Books Chapters Documents and

Procedure | 2026-05-11 17:19:53 A Overview of Books Chapters and Pages / Managing Books

Procedure Name Overview of Books Chapters and Pages

Book Name

Operating Manual

Procedure Category

Managing Books

Purpose

This Corporate Intelligence System allows you to create multiple books to be indexed for searches and ingested for use by the AI Chat Module. This procedure describes how to create and manage books chapters screens and procedures within the documentation system. The goal is to instruct the client how to organize information into books chapters and pages so that the information can be indexed for search and ingested into the AI module so the chat agent can answer questions in plain English.

General Information

This system allows you to create books containing chapters and pages. Pages may represent either informational documents or help screens associated with a program. Procedures may also be added as part of the book structure. Chapters and sections control the order and grouping of information so the manual and AI indexing remain organized.

Where To Find

Books and chapters are managed using the menu item Books and Chapters and the related submenu items Books and Chapters. Screen documents are managed using the menu item Screen Documents. Procedures are managed using the menu item Procedure Documents.

Procedure Detail

1. You must create a book title before adding chapters screens or procedures. Use the Books menu item to list current book titles and add a new book title.

2. After a book title exists you may add chapters using the Chapter menu item. Select the book title enter the chapter number which determines the order of the chapter within the manual enter the chapter name and choose the placement which can be F for front M for middle or A for appendix. Normally you should select BOTH for the Read From Switch unless you want the chapter to contain only screens or only procedures.

3. Procedures are created modified or deleted using the Procedure Document menu item. Select the book title that the procedure will belong to. You may select add or delete a procedure category so that procedures are grouped together. Select a category in order to view procedures that belong to that group. Use the screen grid to view update delete or search for procedures.

When adding or editing a procedure the metadata and keyword fields help the AI chat agent categorize the information. Metadata keys are preloaded and may be selected using the Select button. Enter the value for the metadata key and press Move To to add it. Metadata can be removed using the Remove button.

Keywords provide additional descriptive information used by the AI search and chat agent. Select a keyword from the list highlight it press Select and then press Move To to stage it. You may also enter a new keyword manually and press Move To. Keywords may be removed by pressing the Remove button.

Enter a descriptive procedure name and procedure description. Audience determines who can view the procedure and normally should be BOTH but may be set to CLIENT only or ADMIN for system administrators. Help Mode defines whether the procedure content is stored as HTML or plain text.

The procedure text itself follows a standard structure. The system requires HTML heading tags for each section but when writing the text you should think in terms of the section names without the tags. Each paragraph of text should be wrapped in a p tag when entered.

The standard procedure section headings are Procedure Name Book Name Procedure Category Purpose General Information Where To Find Procedure Detail Examples and Troubleshooting. When entering the text the headings must be created using h2 and h3 HTML tags and each paragraph must be enclosed within p tags.

4. Screens and documents are managed using the Screen Document menu item. This screen displays a list of security groups so that a screen or document can be associated with general security access. The screen grid displays all screens that satisfy the search criteria or all screens if no search term is entered.

You must select a book title that the screen document belongs to. You may add view update delete or quickly view the help text of the screen prior to editing.

When adding or editing a screen the detail form begins with Add Save and Cancel buttons. Metadata and Keywords function exactly the same as described in the procedure section above.

Enter the screen name. If the entry represents a help page for an actual program you must enter the program name without the file extension for example Main_Menu instead of Main_Menu.php. Informational pages may use free format names.

Select the security group number from the security group list. Select the chapter name from the dropdown list. Enter the section number using the format 000.000 which determines the order within the chapter. Enter the section name which is important for AI search and categorization.

Audience determines who may view the screen documentation and follows the same rules described earlier. Help Mode determines whether the help text is stored as HTML or plain text.

For informational pages the text may be entered freely however each section heading defined by an h3 tag becomes an important index point used by the AI system to locate relevant information.

The standard screen documentation headings are Section Number and Name Purpose WhereToFind Images ButtonsAndActions FieldsOrSettings KeysAndScope RulesAndValidations DownstreamEffects Examples Troubleshooting and SecurityAndAccess. These headings must be created using h2 and h3 tags while the descriptive text beneath them must be enclosed in p tags.

Examples

An example of creating a book would be creating a book titled Operating Manual adding a chapter called System Overview and then creating screens or procedures under that chapter with section numbers that determine their order.

Troubleshooting

If chapters screens or procedures cannot be added confirm that a book title has been created first. Ensure the correct book title and category have been selected before attempting to add procedures or screen documents.

200.000 - How to Create and Manage Books

Procedure | 2026-05-11 17:22:54 Creating Book Titles / Managing Books

Procedure Name Creating Book Titles

Book Name

Operating Manual

Procedure Category

Managing Books

Purpose

This procedure explains how to create and maintain book titles used to organize documentation chapters screens and procedures within the manual system.

General Information

The documentation system is organized into books chapters and pages.

A book title is the top level container that holds all chapters screens and procedures.

Chapters organize the manual into logical sections while screens and procedures represent the pages within those chapters.

A book must exist before any chapters screens or procedures can be created.

Where To Find

Book titles are created and maintained using the menu item Books and Chapters.

This screen displays the list of existing book titles and allows new book titles to be added updated or removed.

Procedure Detail

Open the Books and Chapters menu item.

The screen will display the existing list of book titles.

To create a new book select Add and enter the name of the book title.

Save the entry to make the book available for chapter screen and procedure creation.

Once the book title exists you may proceed to create chapters within the book and later create screen documents and procedures associated with those chapters.

Examples

An example would be creating a book titled Operating Manual.

After the book is created chapters such as System Overview Accounting Functions or Administration can be added and the related screens and procedures can be organized under those chapters.

Troubleshooting

If chapters screens or procedures cannot be added confirm that a book title has been created first.

Ensure that the correct book title is selected when adding new documentation.

300.000 - How to Create Manage Chapters

Procedure | 2026-05-11 17:23:20 Creating Chapters / Managing Books

Procedure Name Guidance on Creating Chapters

Book Name

Operating Manual

Procedure Category

Managing Books

Purpose

This procedure explains how to create and manage chapters within an existing book so that documentation is organized in the correct order for manual display search indexing and AI ingestion.

General Information

Chapters are organizational containers within a book.

Each chapter belongs to a specific book title.

Chapters group screens documents and procedures into logical sections.

The chapter number controls the display order of the chapter within the manual.

The placement setting determines whether the chapter appears in the front middle or appendix section of the manual.

A book title must exist before a chapter can be created.

Where To Find

Chapters are created and maintained using the Books and Chapters menu item.

Select the Chapter submenu option to manage chapter records associated with a selected book title.

Procedure Detail

Open the Books and Chapters menu item and select the Chapter option.

Select the book title that the chapter will belong to.

Enter the chapter number which determines the order of the chapter within the manual.

Enter the chapter name which describes the subject matter of the chapter.

Select the placement value which can be F for front M for middle or A for appendix.

Select the Read From Switch option normally set to BOTH unless the chapter should contain only screens or only procedures.

Save the chapter to make it available for associating screen documents and procedures.

Examples

An example would be selecting the Operating Manual book title and adding a chapter number 100 with the name System Overview placed in the middle section of the manual.

After saving the chapter screen documents and procedures may be created and assigned to this chapter.

Troubleshooting

If the chapter cannot be saved confirm that a valid book title has been selected.

If screens or procedures do not appear under a chapter confirm that they were created using the same book title and correctly assigned chapter name.

400.000 - How to Create Screens and Documents

Procedure | 2026-05-11 17:21:29 Create Screen Documents / Managing Books

Procedure Name Guidance on Creating Screen Documents

Book Name

Operating Manual

Procedure Category

Managing Books

Purpose

This procedure explains how to create modify and manage screen documents and informational pages within a selected book and chapter so that program help and documentation are properly organized indexed and available to the AI chat agent.

General Information

Screen documents represent help pages associated with program screens or informational documentation pages within a chapter.

Each screen document must be associated with a valid book title and chapter.

If the document represents a program help screen the program name must be entered without the file extension.

Section numbers determine the order of the screen within the chapter using the format 000.000.

Metadata and keywords improve AI search accuracy and categorization.

Audience controls who may view the screen documentation and Help Mode defines whether the content is stored as HTML or plain text.

Where To Find

Screen documents are created and maintained using the menu item Screen Documents.

The screen grid displays all screens that match the search criteria or all screens when no filter is applied.

Procedure Detail

Open the Screen Documents menu item.

Select the book title that the screen document will belong to.

Use the grid to search view update delete or perform a quick help preview of an existing screen.

Select Add to create a new screen document or View to modify an existing one.

Enter the screen name and if applicable enter the associated program name without the file extension.

Select the security group number from the security group list displayed on the screen.

Select the chapter name from the dropdown list.

Enter the section number using the format 000.000 to define the sort order within the chapter.

Enter the section name which is important for AI indexing and search relevance.

Select the appropriate Audience value normally set to BOTH unless restricted to CLIENT or ADMIN.

Select the Help Mode to define whether the help content is stored as HTML or text.

Use the Metadata section to select predefined metadata keys enter their values and move them to the selected list.

Use the Keywords section to select predefined keywords or enter new keywords and move them to the selected list.

Enter the screen help text following the standard heading structure using required heading tags and paragraph tags.

Save the screen document to store the record and make it available for indexing and AI ingestion.

Examples

An example would be creating a screen document for Main_Menu with section number 120.000 under the System Overview chapter within the Operating Manual book.

After saving the screen document it becomes searchable and accessible through the AI chat system.

Troubleshooting

If the screen does not appear in the grid confirm that the correct book title and search criteria are selected.

If the screen cannot be saved confirm that required fields such as screen name book title chapter section number audience and help mode have been entered.

500.000 - How to Create Procedures

Procedure | 2026-05-11 17:23:51 Creating Procedures / Managing Books

Procedure Name Guidance on Creating Procedures

Book Name

Operating Manual

Procedure Category

Managing Books

Purpose

This procedure explains how to create modify and manage procedure documents within a selected book so that operational instructions are properly organized indexed and available to the AI chat agent.

General Information

Procedures are structured documentation pages grouped under a book and chapter.

Each procedure must be associated with a valid book title.

Procedures are grouped by a procedure category which allows related procedures to be organized together.

Metadata and keywords are used to improve AI search relevance and response accuracy.

Audience controls who may view the procedure and Help Mode defines whether the content is stored as HTML or plain text.

Where To Find

Procedures are created and maintained using the menu item Procedure Documents.

The procedure grid displays procedures based on the selected book title and procedure category.

Procedure Detail

Open the Procedure Documents menu item.

Select the book title that the procedure will belong to.

Select or create a procedure category to group related procedures.

Use the grid to view update delete or search for existing procedures.

Select Add to create a new procedure or View to modify an existing procedure.

Enter a descriptive procedure name and procedure description.

Select the appropriate Audience value normally set to BOTH unless restricted to CLIENT or ADMIN.

Select the Help Mode to define whether the procedure content is HTML or text.

Use the Metadata section to select predefined metadata keys enter their values and move them to the selected list.

Use the Keywords section to select predefined keywords or enter new keywords and move them to the selected list.

Enter the procedure detail text following the standard heading structure using required heading tags and paragraph tags.

Save the procedure to store the record and make it available for indexing and AI ingestion.

Examples

An example would be creating a procedure under the Operating Manual book within the Managing Books category describing how to create chapters.

After saving the procedure it becomes searchable and accessible through the AI chat system.

Troubleshooting

If procedures do not appear in the grid confirm that the correct book title and procedure category are selected.

If the procedure cannot be saved confirm that required fields such as procedure name category book

title audience and help mode have been entered.

400.000 - Loading Documents for Intelligent Chat Retrieval

50.000 - Loading Notes for Chat Agent

Screen | 2026-05-11 00:00:00 SN_IngestKnowNote

050.000 Loading Notes for Chat Agent

Purpose

Use this screen to load business notes, reference notes, internal knowledge notes, and other typed or pasted text content into the AI knowledge base so the Chat Agent can search, retrieve, and answer from them more effectively.

This screen is intended for controlled knowledge-entry content such as internal notes, process notes, policy notes, business reference notes, research notes, issue summaries, training notes, decision notes, and similar material that should become searchable AI reference content.

Use this screen when knowledge should be entered directly as structured text rather than loaded from an uploaded file.

This screen uses direct text entry and does not depend on a source upload file.

Before parsing begins, the system builds a structured content block that includes important header lines such as author, subject, date, description, and business domain so downstream parsing, chunking, and keyword generation have better context.

Processing

This screen has two main paths.

The first path is Search Delete for reviewing previously loaded note content and deleting a document before reloading a corrected version.

The second path is Add New for typing or pasting note content directly, completing the detail pane, starting parse processing, chunking the content into database records, and then building vectors.

Because this screen is designed for direct text knowledge entry, there is no upload path.

In Add New mode, the user completes the detail pane and the Knowledge Note Text area manually.

The detail pane is important because it tells the system what kind of knowledge is being loaded and improves how the AI classifies and retrieves the content later.

All detail fields should be completed carefully.

Business Domain, Display Name, and a strong Document Description are especially important because they improve how the Chat Agent identifies the topic and returns better, more precise responses.

The description should explain what the note contains, what business area it supports, and what kinds of questions it should help answer.

A good description is not a short title. It should summarize the note content in clear business language.

After the detail pane is saved, the system starts a new parse run using the prepared text content assembled for the note.

Because this note process uses direct text transport, there is no staged resume cycle for this screen.

When parsing reaches a successful end point, the parsed content is ready for database commit.

Chunk creates the document, source, and chunk records in the database.

After chunking completes successfully, the Vector step becomes available.

Vectoring converts each chunk into a semantic numeric representation that helps the Chat Agent find related meaning even when the user does not use the exact words stored in the note.

Without vectors, retrieval depends more heavily on direct text matching.

With vectors, retrieval is improved because the system can locate related ideas, not only exact phrases.

WhereToFind

Main Menu to Ingest Documents to Ingest Notes.

Images

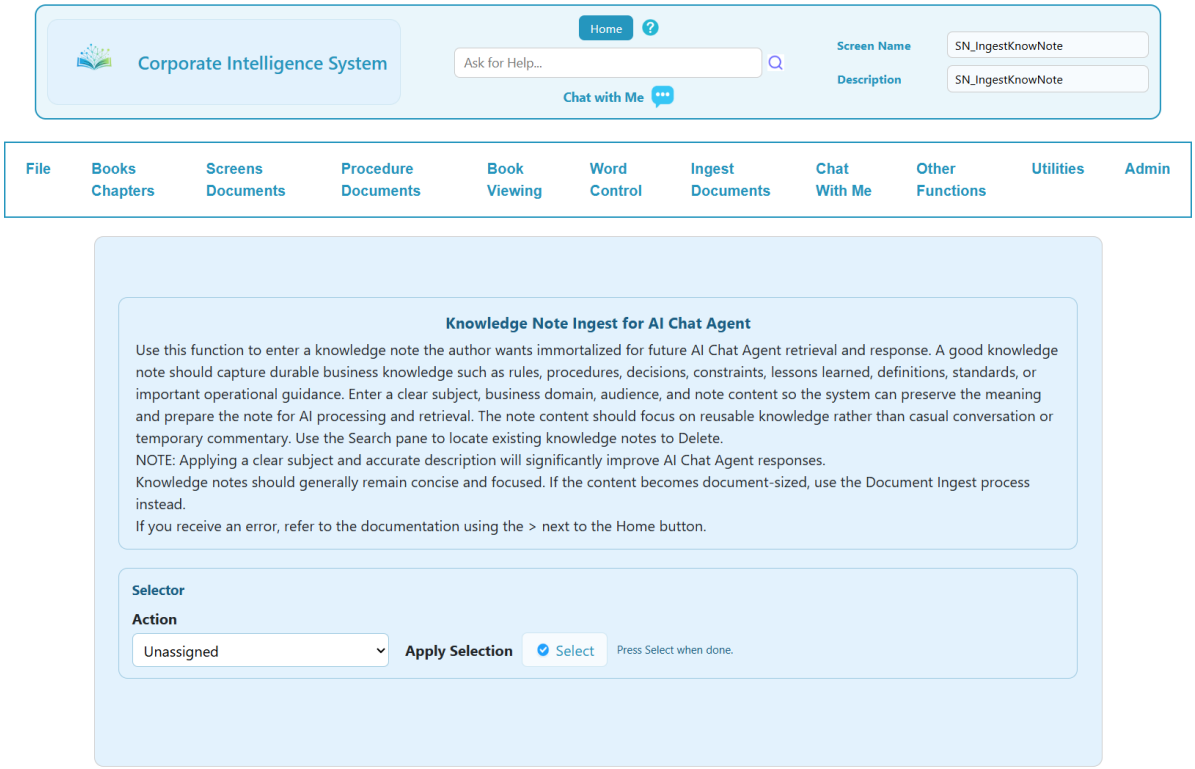


Figure: Main Note Ingest Screen.

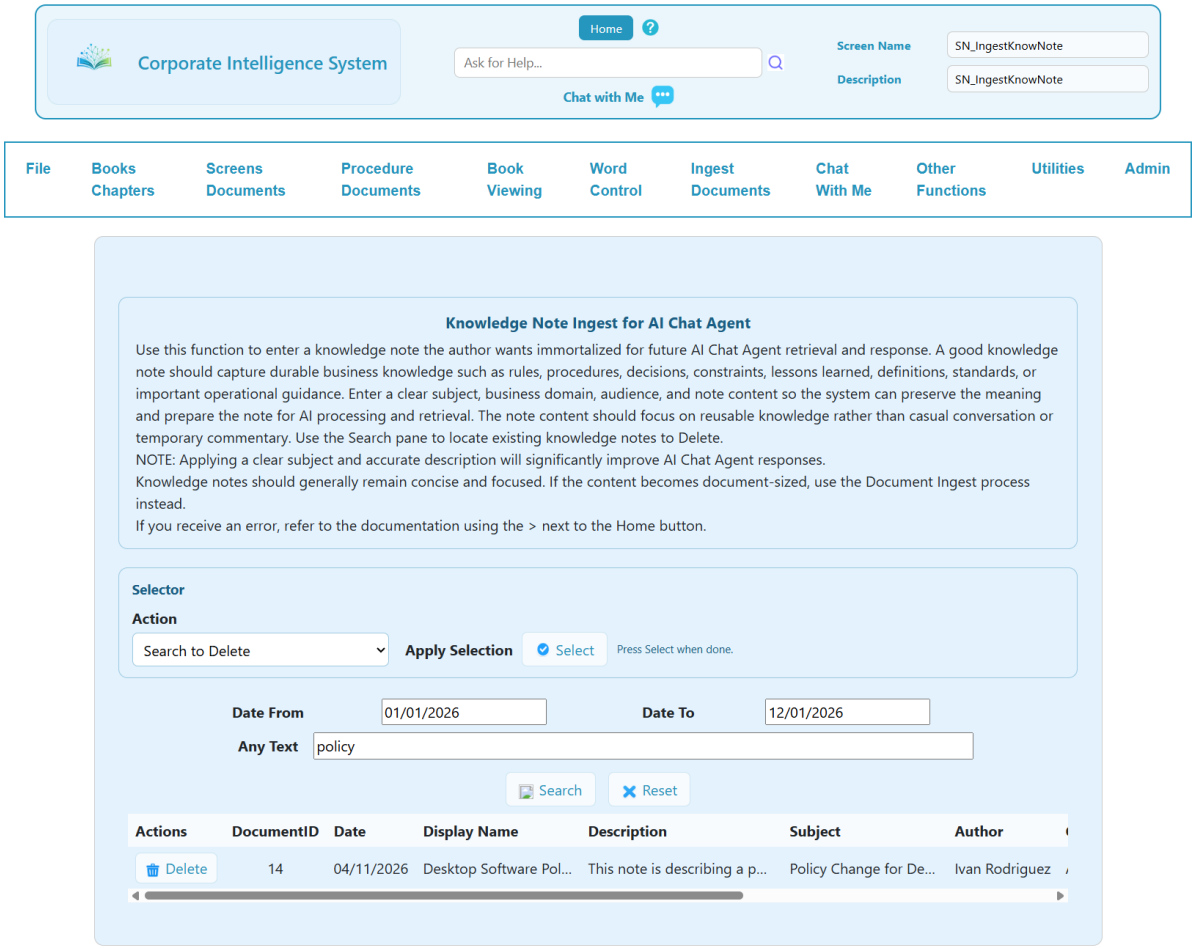


Figure: Search for Delete.

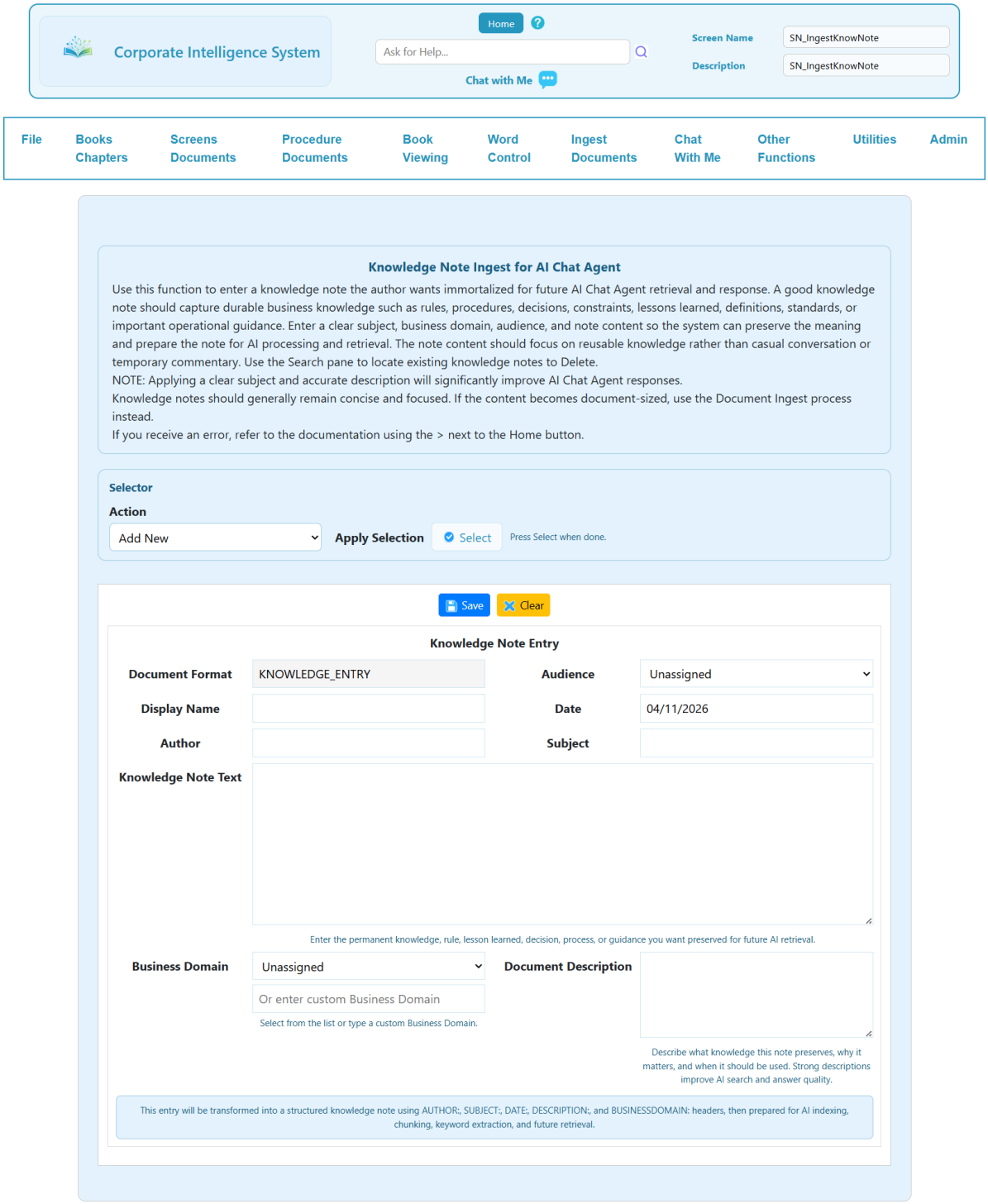


Figure: Detail Screen.

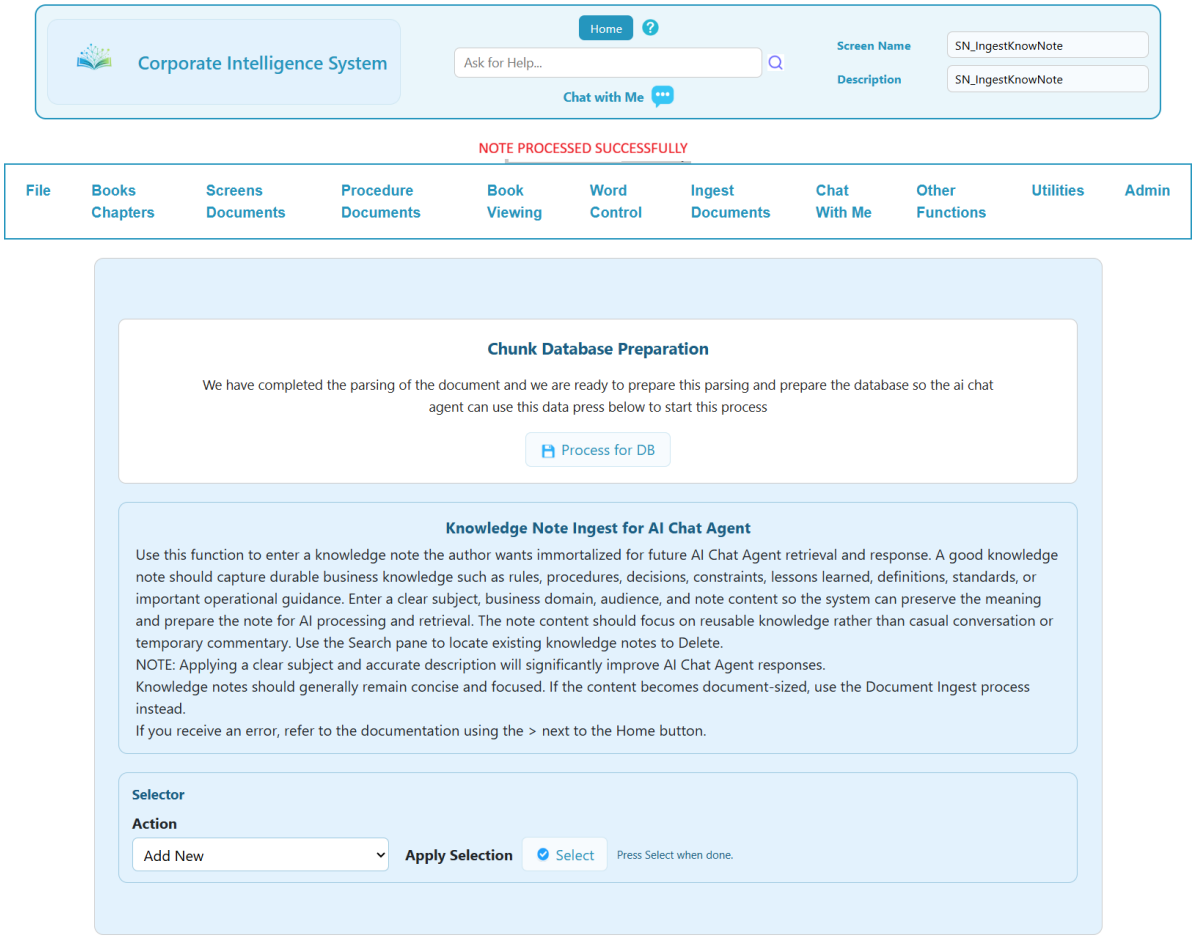


Figure: Commit Parse to Database Chunks.

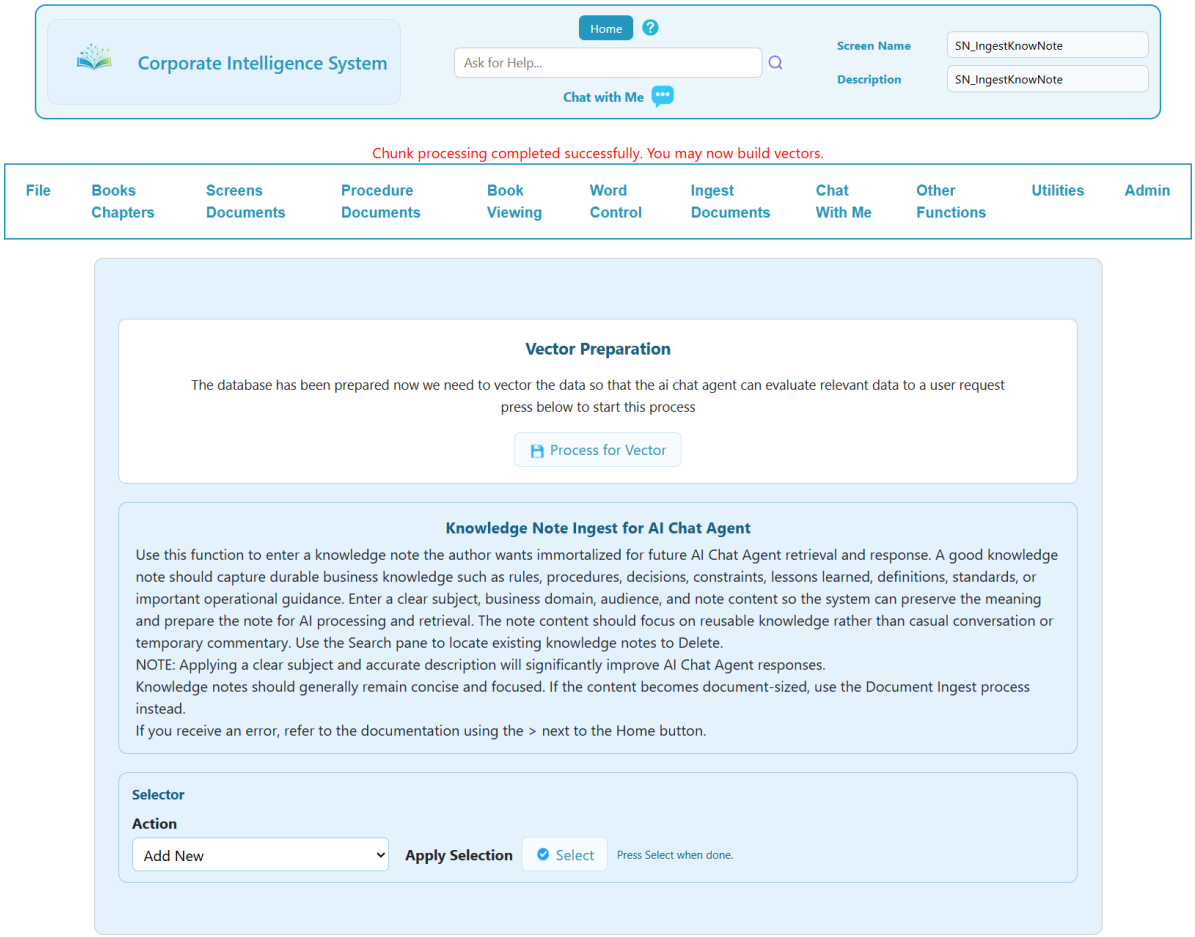


Figure: Vector for AI Chat Agent.

ButtonsAndActions

Select chooses the workflow path based on the selected mode.

Add New opens the manual entry path for a new knowledge note.

Search Delete opens the search path so previously loaded note documents can be reviewed or removed.

Search runs the search criteria and displays matching loaded documents in the grid.

Reset clears the search criteria and hides the result grid until a new search is run.

Delete removes the selected loaded document record and its related ingest content through the delete router.

Clear clears the detail pane fields.

Save validates the detail pane and starts a new parse run.

Chunk writes the parsed content into the database as document, source, and chunk records.

Vector builds semantic search vectors for the chunked content.

FieldsOrSettings

Document Format identifies the note content type and should remain KNOWLEDGE_ENTRY for this process.

Audience identifies who the note content is intended for.

Display Name is the main user-facing name for the knowledge note and should be short, specific, and searchable.

Business Domain classifies the content area such as accounting, operations, maintenance, IT, compliance, training, legal, administration, support, or another business topic.

Custom Business Domain may be used when the needed domain is not available in the standard selection.

Document Description is one of the most important fields on the screen.

Document Description should clearly explain what the knowledge note covers, what business area it supports, and what kinds of questions the Chat Agent should be able to answer from it.

Author identifies who prepared or issued the knowledge note.

Subject identifies the main topic of the note.

Date identifies the document date for the note record.

Knowledge Note Text contains the main typed or pasted note content that will be sent into the parse runtime.

The prepared note text includes header-prefixed lines such as AUTHOR, SUBJECT, DATE, DESCRIPTION, and BUSINESSDOMAIN ahead of the body text so the AI can form better document-level keywords.

Example description guidance: This note explains the business topic, identifies the purpose and scope, records important dates or roles, and supports questions about procedures, responsibilities, definitions, decisions, and expected handling.

A weak description makes retrieval less precise.

A strong description improves downstream document identity, chunk relevance, and AI response quality.

KeysAndScope

This screen works with manually entered or pasted knowledge-note content that becomes AI reference content.

This screen does not depend on an uploaded file.

After chunk commit, the system creates permanent document and source records and then creates chunk records tied to those identities.

The document type for this screen is KNOWLEDGE_ENTRY.

This screen is intended for direct note-style content rather than uploaded emails, manuals, books, or other file-based ingest processes.

RulesAndValidations

Document Format must be KNOWLEDGE_ENTRY.

Audience is required.

Display Name is required and should always be completed carefully.

Business Domain is required.

Author is required.

Subject is required.

Date is required.

Document Description is required.

Knowledge Note Text is required.

The detail pane must validate before Save can start parse processing.

For direct text transport, content text must not be blank.

Chunk cannot proceed unless parsed data is available.

Vectoring should be run only after chunking completes successfully.

If the process stops on a hard error, do not keep pressing later buttons.

Correct the note content or detail fields and then restart the load from the beginning.

DownstreamEffects

Save starts the parse run and creates the API parse request behind the scenes.

Save also prepares structured content text from the entered Author, Subject, Date, Description, Business Domain, and Knowledge Note Text fields.

Chunk creates document, source, and chunk rows in the database.

The document row is stored as KNOWLEDGE_ENTRY.

Vector adds semantic retrieval support for those chunks.

After vectoring completes, the loaded note becomes more useful to the Chat Agent for retrieval-augmented answers.

Examples

Example 1: Load an internal process note so the Chat Agent can answer questions about steps, responsibilities, timing, and expected handling.

Example 2: Load a business reference note so the Chat Agent can answer questions about definitions, policies, controls, and operating rules.

Example 3: Load a project summary note so the Chat Agent can answer questions about decisions, scope, assumptions, and follow-up actions.

Example 4: Search for an older loaded note, delete the old version, then reload a corrected edition.

Troubleshooting

If the screen shows Action is required, no mode was selected before pressing Select.

If Validation failed for Detail appears, review the detail pane and complete the required fields with better note information.

If Document Format must be KNOWLEDGE_ENTRY appears, the document format field does not match the required note type for this screen.

If Audience is missing appears, select the correct audience before saving.

If Display Name is missing appears, enter a clear searchable note name before saving.

If Business Domain is missing appears, select or enter the correct business area before saving.

If Author is missing appears, enter the note author before saving.

If Subject is missing appears, enter the note subject before saving.

If Date is missing appears, enter or confirm the note date before saving.

If Document Description is missing appears, enter a better description before saving.

If Knowledge Note Text is missing appears, enter the main note content before saving.

If Unable to start parse process appears, stop and review the note content and detail field setup before retrying.

If No parsed data available for chunk processing appears, parsing did not complete to a valid commit-ready state.

If Chunk processing failed appears, do not continue to Vector.

If a Vector error appears, the chunk data exists but semantic retrieval is not yet ready.

Examples of hard errors include Validation failed for Detail, Unable to start parse process, and Chunk processing failed.

When a hard error occurs, processing should be treated as stopped. Correct the note content or field

content and start over with a fresh load.

SecurityAndAccess

This screen is controlled by program security and related update access settings.

Read access is required to open the screen.

Write access is required for delete, parse, chunk, and vector actions.

Users without sufficient rights may be able to view the screen but will not be allowed to perform update actions.

100.000 - Loading Emails for AI Chat Agent

Screen | 2026-05-11 00:00:00 SN_IngestEmail

100.000 Loading Emails for Chat Agent

Purpose

Use this screen to load email messages and email threads into the AI knowledge base so the Chat Agent can search, retrieve, and answer from them more effectively.

This screen is intended for business email content such as customer emails, vendor emails, staff communications, notices, request chains, support exchanges, internal discussions, and similar message content that should become searchable AI reference material.

Use this screen when an email message or email thread should be loaded as controlled AI content and later made available for chunking and vector-based retrieval.

Supported upload type is EML.

The maximum upload size for this screen is 10 KB per file.

The screen also supports direct typed or pasted email content through Add New without requiring an uploaded EML file.

Before parsing begins, the system builds a structured content block that includes important header lines such as recipient, sender, subject, date, description, and business domain so downstream parsing, chunking, and keyword generation have better context.

Processing

This screen has two main paths.

The first path is Search and Delete for reviewing previously loaded email content, downloading the original stored EML file when one exists, or deleting a document before reloading a corrected version.

The second path is Add New for either typing or pasting email content directly or uploading an EML file, completing the detail pane, starting parse processing, chunking the content into database records, and then building vectors.

In Upload mode, select the source EML file and upload it first.

After upload, the detail pane is populated from the email and should be reviewed carefully before parsing begins.

In Add New mode, the user may complete the detail pane and email content area manually without uploading a file.

The detail pane is important because it tells the system what kind of email content is being loaded and improves how the AI classifies and retrieves the knowledge later.

All detail fields should be completed carefully.

Business Domain, Display Name, and a strong Document Description are especially important because they improve how the Chat Agent identifies the topic and returns better, more precise responses.

The description should explain what the email or thread contains, who it is for, and what kinds of questions it should help answer.

A good description is not a short title. It should summarize the message content in clear business language.

After the detail pane is saved, the system starts a new parse run using the prepared text content already assembled for the email.

Because this email process uses direct text transport, there is no staged resume cycle for this screen.

When parsing reaches a successful end point, the parsed content is ready for database commit.

Chunk creates the document, source, and chunk records in the database.

After chunking completes successfully, the Vector step becomes available.

Vectoring converts each chunk into a semantic numeric representation that helps the Chat Agent find related meaning even when the user does not use the exact words stored in the email.

Without vectors, retrieval depends more heavily on direct text matching.

With vectors, retrieval is improved because the system can locate related ideas, not only exact phrases.

WhereToFind

Main Menu to Ingest Documents to Ingest Emails.

Images

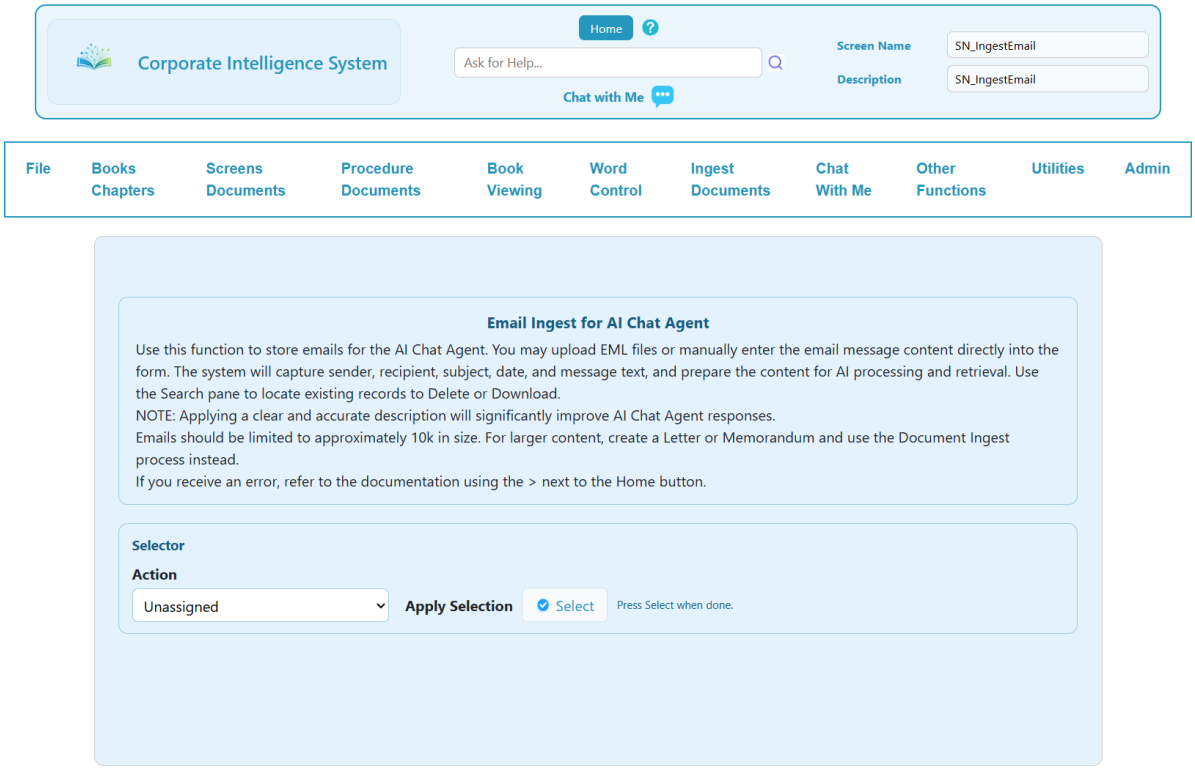


Figure: Main Email Ingest Screen.

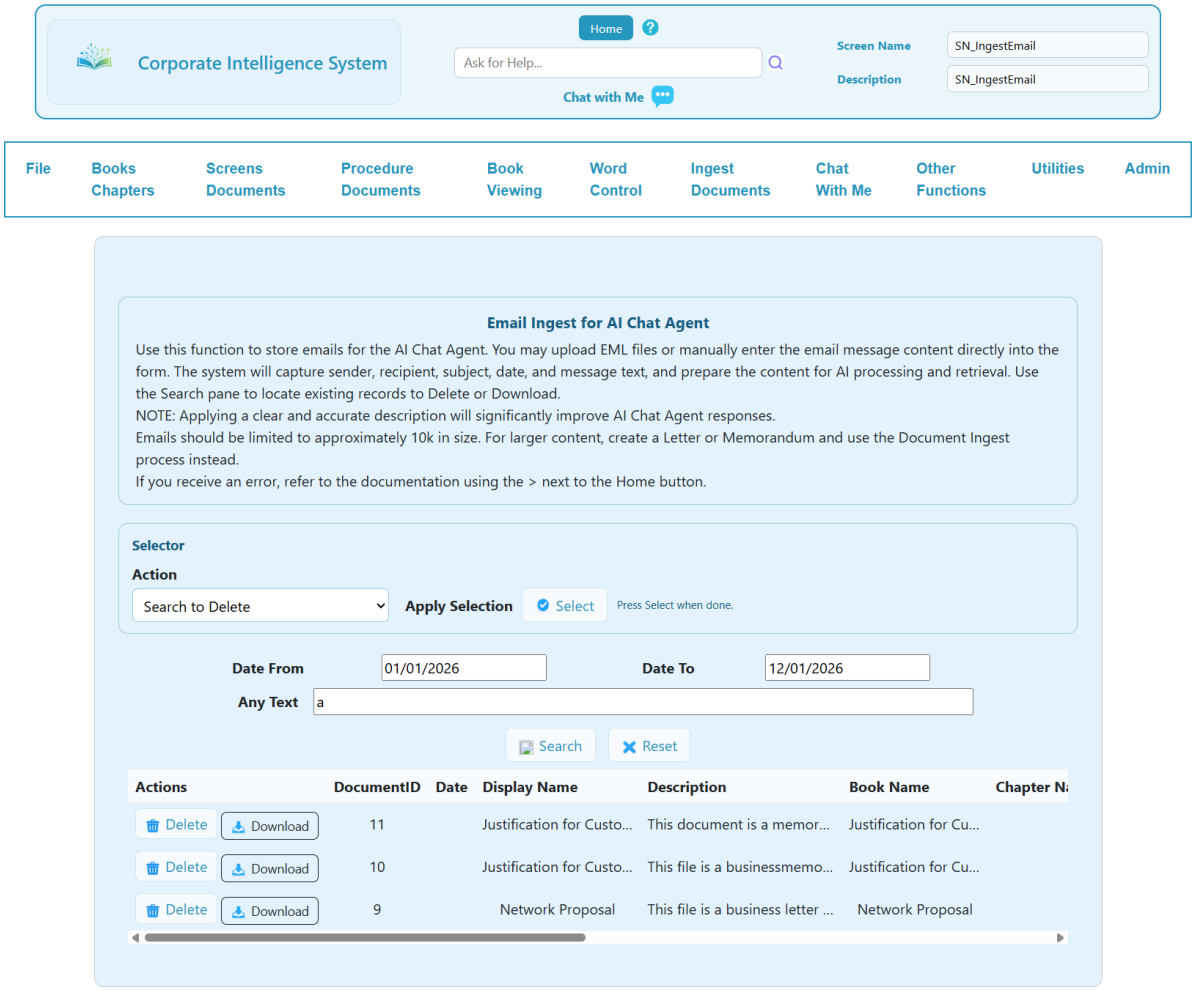


Figure: Search for Delete Download.

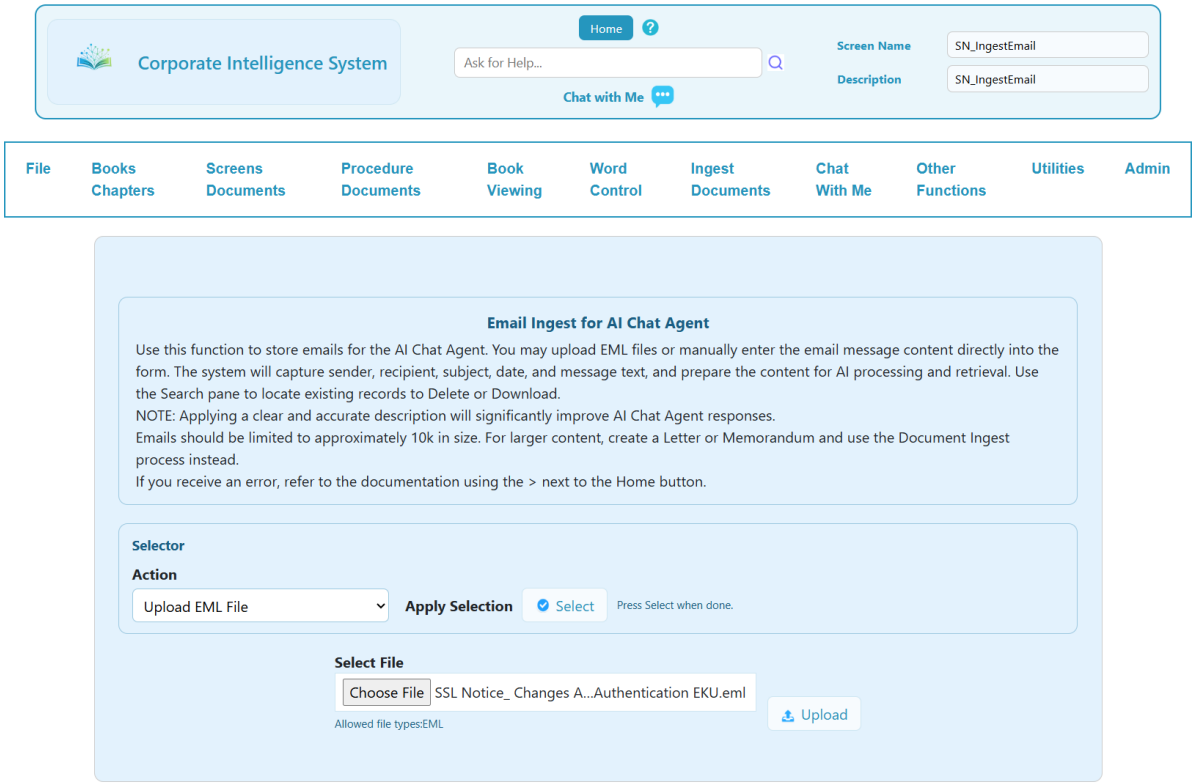


Figure: Upload EML File.

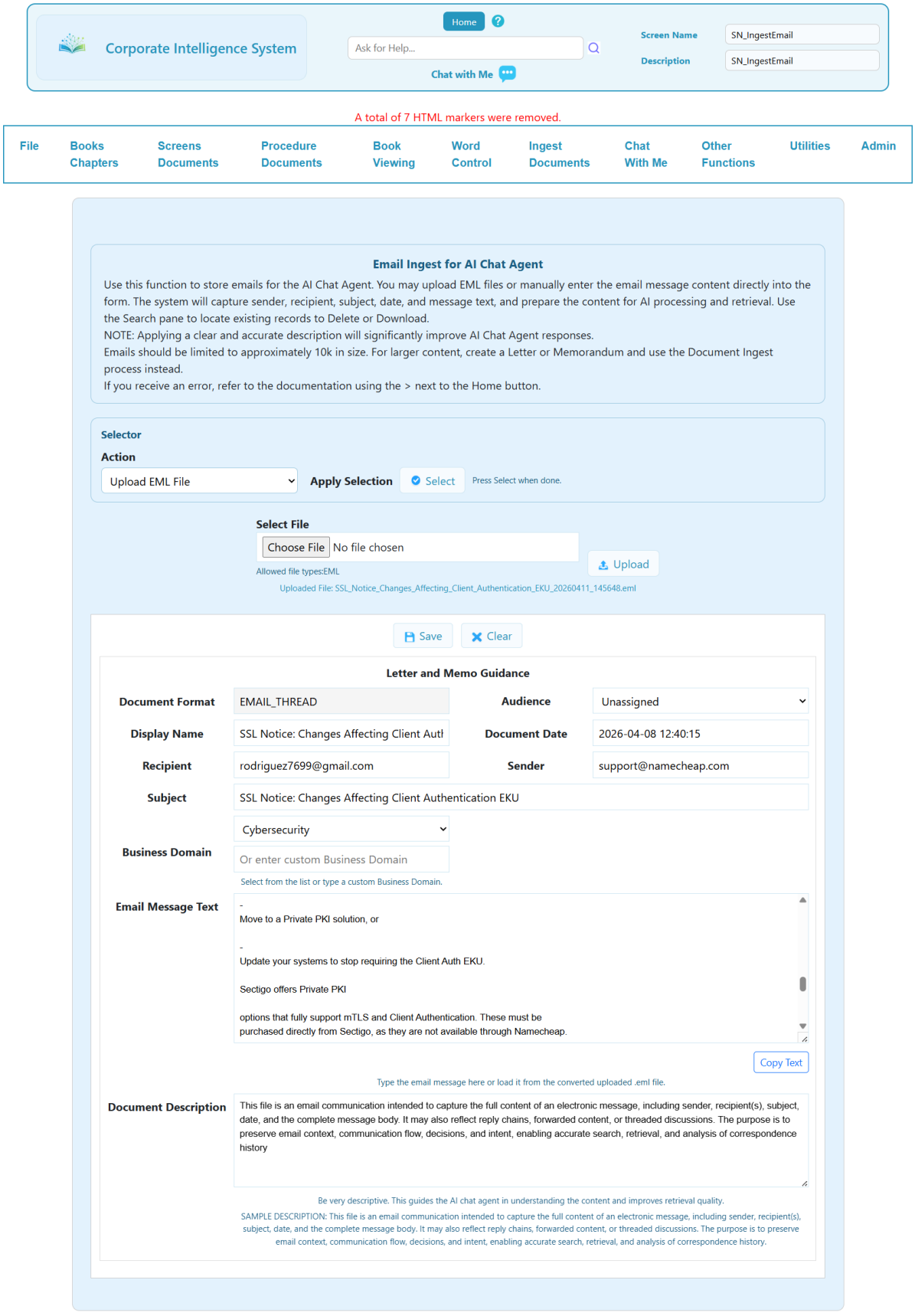


Figure: Detail Screen.

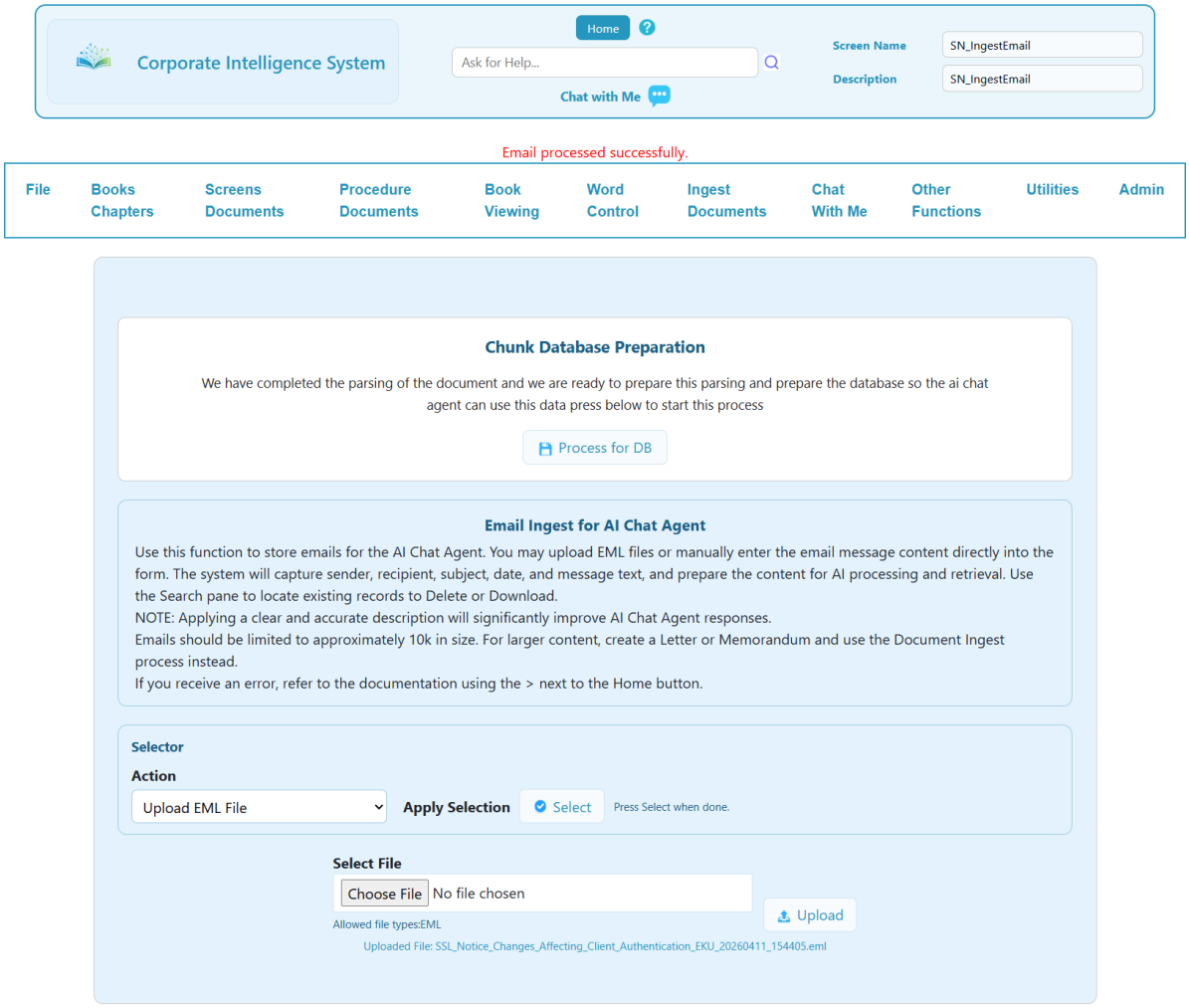


Figure: Commit Parse to Database Chunks.

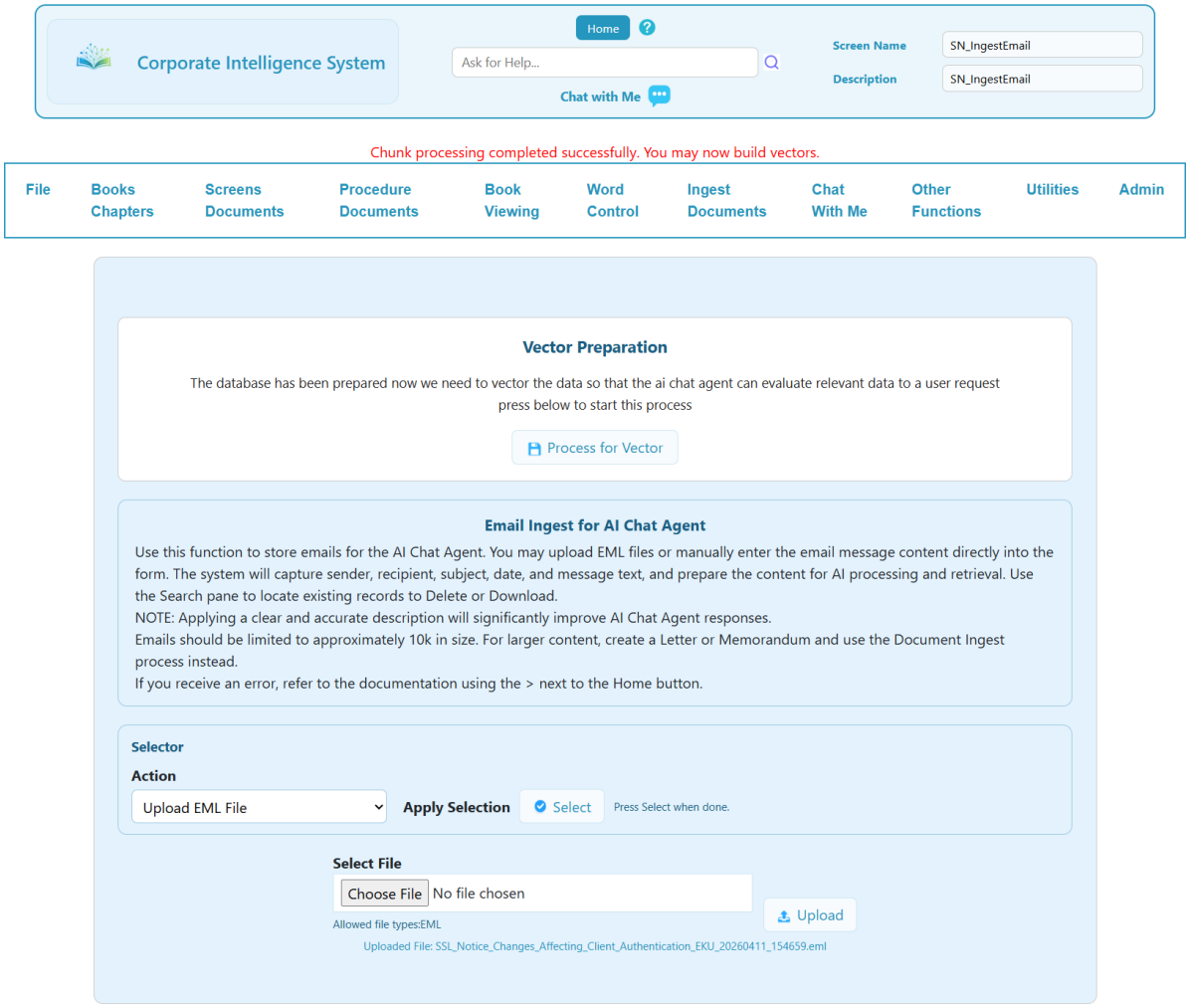


Figure: Vector for AI Chat Agent.

ButtonsAndActions

Select chooses the workflow path based on the selected mode.

Add New opens the manual entry path for a new email or email thread.

Upload EML File opens the upload path so an EML file can be selected and parsed into the detail pane.

Search Delete opens the search path so previously loaded email documents can be reviewed or removed.

Upload sends the selected EML file to the temporary upload area and starts email extraction into the detail pane fields and prepared content text.

Search runs the search criteria and displays matching loaded documents in the grid.

Reset clears the search criteria and hides the result grid until a new search is run.

Delete removes the selected loaded document record and its related ingest content through the delete router.

Download opens the original stored upload file in a separate window so the source email file can be reviewed when an uploaded EML exists.

Clear clears the detail pane fields.

Save validates the detail pane and starts a new parse run.

Chunk writes the parsed content into the database as document, source, and chunk records.

Vector builds semantic search vectors for the chunked content.

FieldsOrSettings

Document Format identifies the email content type and should remain aligned with the email ingest process.

Audience identifies who the message content is intended for.

Display Name is the main user-facing name for the email document and should be short, specific, and searchable.

Business Domain classifies the content area such as accounting, operations, maintenance, IT, compliance, training, legal, administration, support, or another business topic.

Document Description is one of the most important fields on the screen.

Document Description should clearly explain what the email or thread covers, what business area it supports, and what kinds of questions the Chat Agent should be able to answer from it.

Recipient identifies who the email is addressed to.

Sender identifies who issued or sent the email.

Subject identifies the main topic of the email or thread.

Date identifies the document date for the email record.

Email Content Text contains the prepared email text that will be sent into the parse runtime.

The prepared email text may include header-prefixed lines such as RECIPIENT, FROM, SUBJECT, DATE, DESCRIPTION, and BUSINESSDOMAIN ahead of the body text so the AI can form better document-level keywords.

Example description guidance: This email thread explains the customer issue, records support follow-up, identifies key dates and senders, and supports questions about request history, promised actions, responsibilities, and final resolution.

A weak description makes retrieval less precise.

A strong description improves downstream document identity, chunk relevance, and AI response quality.

KeysAndScope

This screen works with uploaded EML files and manually entered email content that become AI reference content.

The source upload is first stored in a temporary upload location when an EML file is used.

The original uploaded EML file is later moved into permanent document file storage so it can still be downloaded from search results.

After chunk commit, the system creates permanent document and source records and then creates chunk records tied to those identities.

This screen is intended for email-style content rather than large manuals, books, or long correspondence collections that belong in other ingest processes.

RulesAndValidations

Only EML files are allowed for upload mode.

The maximum upload size is 10 KB.

A file must be selected before Upload is pressed in upload mode.

The upload must contain a valid temporary upload file, file name, and file size.

The upload directory must be available.

The detail pane must validate before Save can start parse processing.

Display Name is required and should always be completed carefully.

For direct text transport, content text must not be blank.

Chunk cannot proceed unless parsed data is available.

Vectoring should be run only after chunking completes successfully.

If the process stops on a hard error, do not keep pressing later buttons.

Correct the email source, simplify the content if needed, and then restart the load from the beginning.

DownstreamEffects

Upload creates a temporary staged ingest setup and extracts email fields into the detail pane.

Save starts the parse run and creates the API parse request behind the scenes.

Chunk creates document, source, and chunk rows in the database.

Vector adds semantic retrieval support for those chunks.

After vectoring completes, the loaded email becomes more useful to the Chat Agent for retrieval-

augmented answers.

Examples

Example 1: Load a customer email so the Chat Agent can answer questions about the request, dates, sender, promised actions, and follow-up responsibility.

Example 2: Load a vendor email so the Chat Agent can answer questions about pricing, delivery, service terms, points of contact, and timing.

Example 3: Load an internal email thread so the Chat Agent can answer questions about decisions, responsibilities, action items, and approvals.

Example 4: Search for an older loaded email, download the original EML file for review, delete the old version, then reload a corrected edition.

Troubleshooting

If the screen shows Action is required, no mode was selected before pressing Select.

If Upload failed - no file selected appears, choose a file and upload again.

If Upload failed - only EML files are allowed appears, convert or export the source email into EML and try again.

If the file is reported as too large, reduce the source message content or use a different ingest method that supports larger source material.

If Validation failed for Detail appears, review the detail pane and complete the required fields with better email information.

If Content text is required for EXTRACTED_TEXT transport appears, the prepared email text was blank at save time and must be corrected before parsing can start.

If Unable to start parse process appears, stop and review the source email content and detail field setup before retrying.

If No parsed data available for chunk processing appears, parsing did not complete to a valid commit-ready state.

If Chunk processing failed appears, do not continue to Vector.

If a Vector error appears, the chunk data exists but semantic retrieval is not yet ready.

Examples of hard errors include Upload failed - cannot move uploaded file to tempupload, Upload failed - only EML files are allowed, Email parsing failed, and Chunk processing failed.

When a hard error occurs, processing should be treated as stopped. Correct the email source or field content and start over with a fresh load.

SecurityAndAccess

This screen is controlled by program security and related update access settings.

Read access is required to open the screen.

Write access is required for upload, delete, parse, chunk, and vector actions.

Users without sufficient rights may be able to view the screen but will not be allowed to perform update actions.

300.000 - Loading large docx pdf rtf manuals books

Screen | 2026-05-11 00:00:00 SN_IngestPDFDOCXRTF

300.000 Loading large DOCX PDF RTF manuals books for Chat Agent

Purpose

Use this screen to load large knowledge documents into the AI knowledge base so the Chat Agent can search, retrieve, and answer from them more effectively.

This screen is intended for long reference material such as operating manuals, procedure books, accounting standards, IT operations guides, policy manuals, compliance guides, training handbooks, internal reference books, and other large freeform business documents.

Use this screen when the original document is too large for small one-step ingest methods and should be converted, parsed, chunked, and vectored in stages.

Supported upload types are PDF, DOCX, and RTF.

The maximum upload size for this screen is 1.5 MB per file.

After upload, the system converts the document to text and divides it into smaller text files of about 10 KB each so the AI knowledge pipeline can process the material in stable, controlled stages.

Processing

This screen has two main paths.

The first path is Search and Delete for reviewing documents that were previously loaded, downloading the original stored file, or deleting a document before reloading a corrected version.

The second path is Add New for uploading a new file, completing the detail pane, starting parse processing, resuming parsing if more staged files remain, committing parsed content, chunking the content into database records, and then building vectors.

In Add New mode, select the source file and upload it first.

After upload, the detail pane must be completed before parsing begins.

The detail pane is important because it tells the system what kind of document is being loaded and improves how the AI classifies and retrieves the knowledge later.

All detail fields should be completed carefully.

Business Domain, Display Name, and a strong Document Description are especially important because they improve how the Chat Agent identifies the topic and returns better, more precise responses.

The description should explain what the document contains, who it is for, and what kinds of questions it should help answer.

A good description is not a short title. It should summarize the document in clear business language.

After the detail pane is saved, the system starts a new segmented parse run.

The parse stage processes the converted text files in sequence.

The system may process up to 7 staged files in one pass.

If more staged files remain, the system will stop at a controlled checkpoint and present Resume Parse so processing can continue from the next point.

Resume is a normal continuation step for larger documents and does not mean the document failed.

When parsing reaches a successful end point, the screen prepares the parsed content for commit.

Commit Parsed Data finalizes the parsed result so it is ready to be written into the chunk pipeline.

Chunk creates the document, source, and chunk records in the database.

After chunking completes successfully, the Vector step becomes available.

Vectoring converts each chunk into a semantic numeric representation that helps the Chat Agent find related meaning even when the user does not use the exact words stored in the document.

Without vectors, retrieval depends more heavily on direct text matching.

With vectors, retrieval is improved because the system can locate related ideas, not only exact phrases.

WhereToFind

Main Menu to Ingest Documents to Ingest Freeform PDF DOCX RTF Manuals and Books.

Images

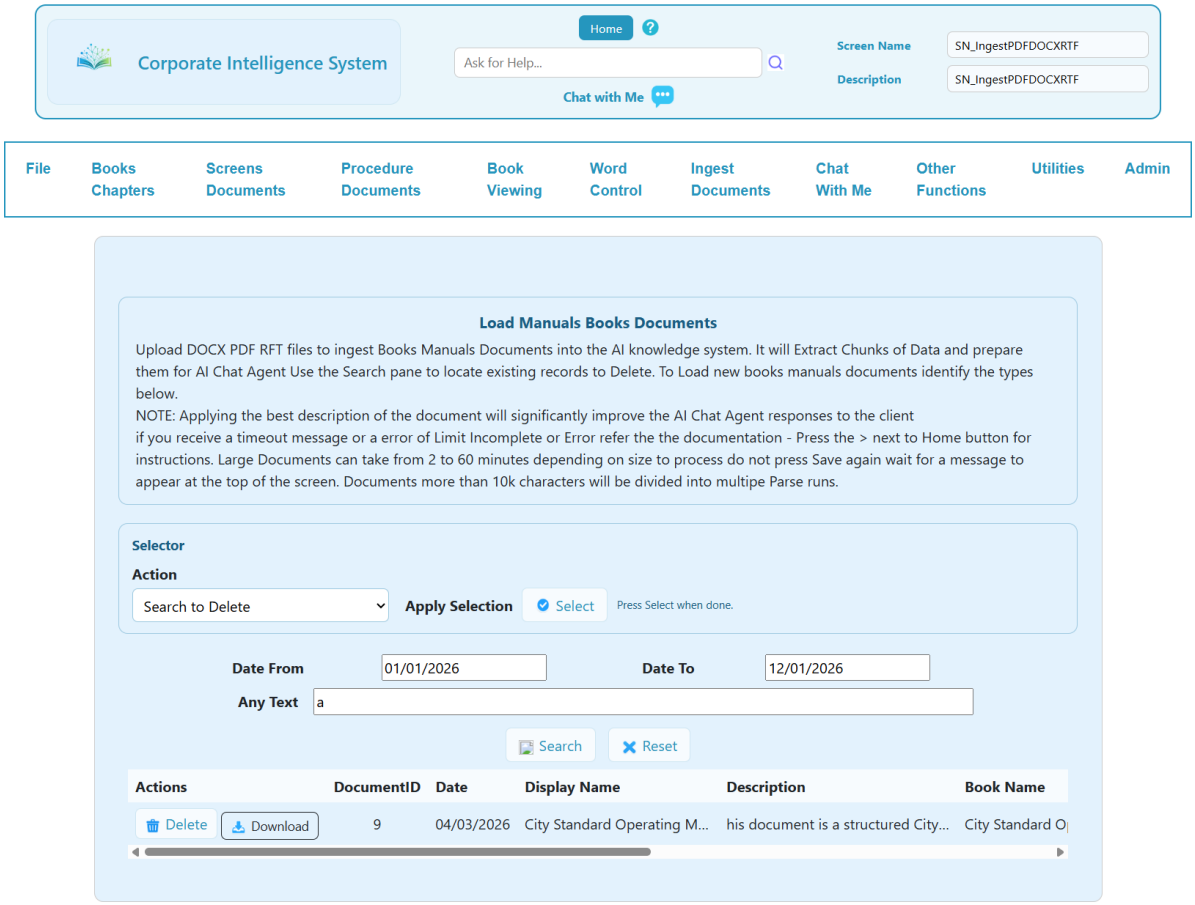


Figure: Search for Delete Download.

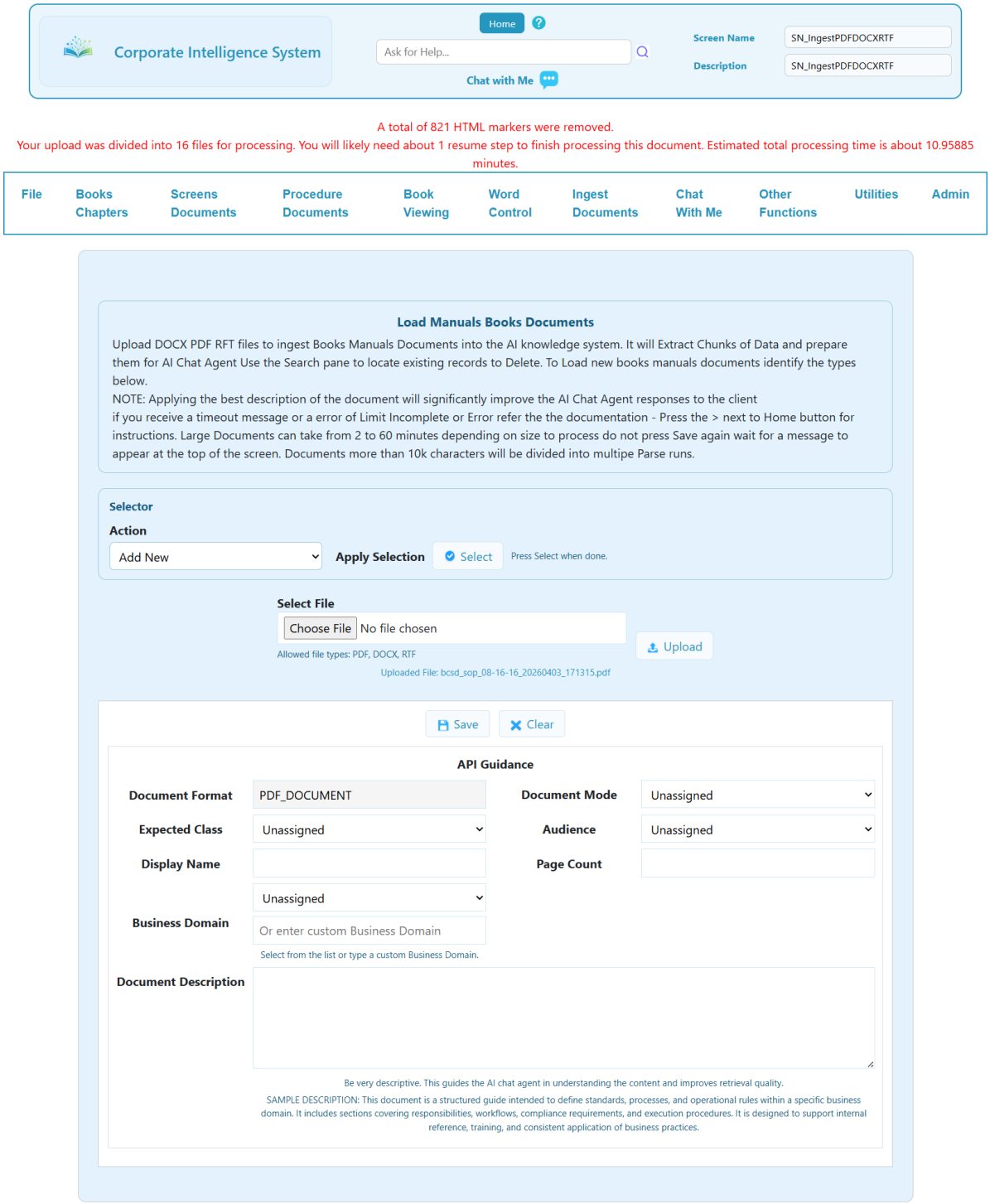


Figure: Upload File.

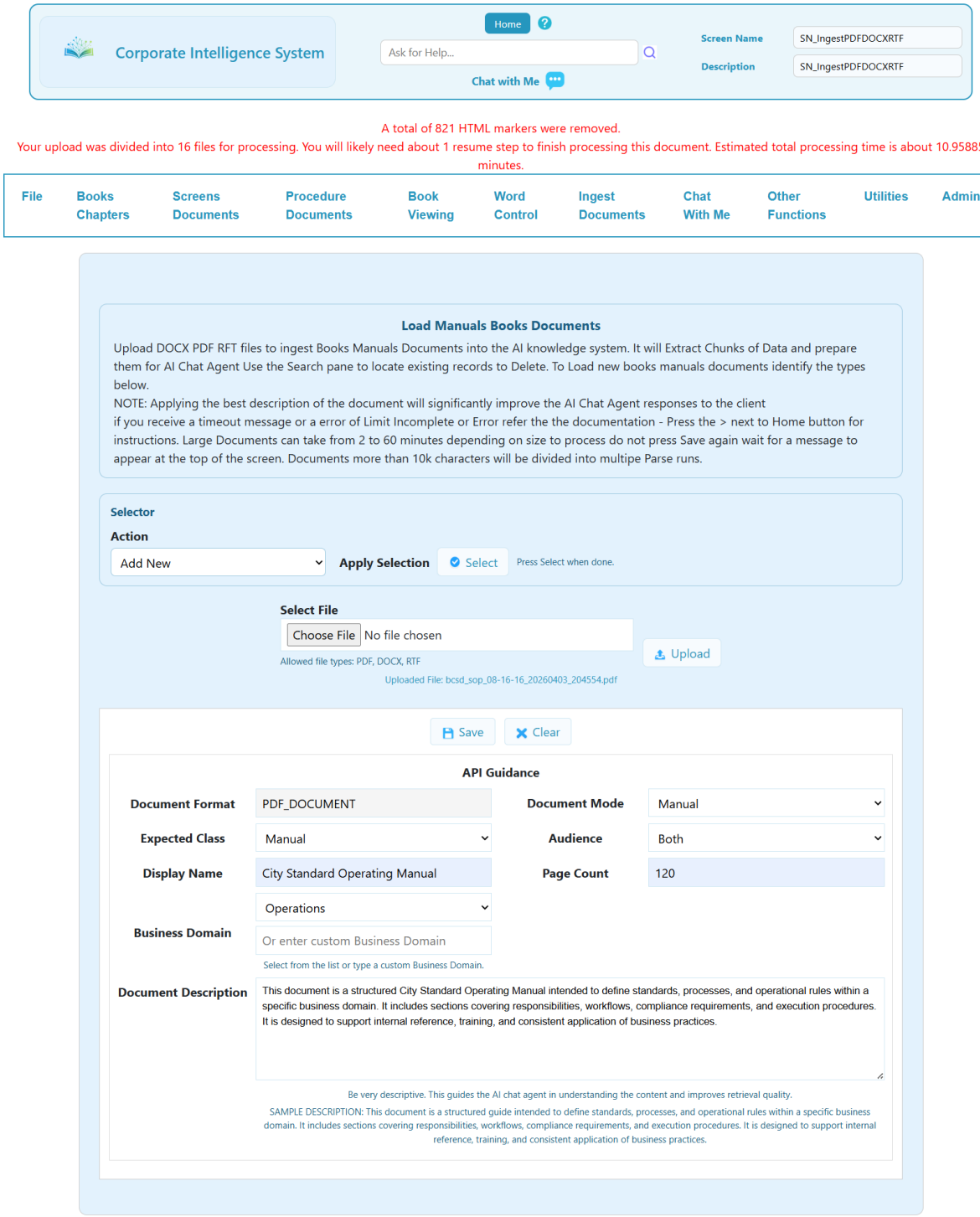


Figure: Detail Screen.

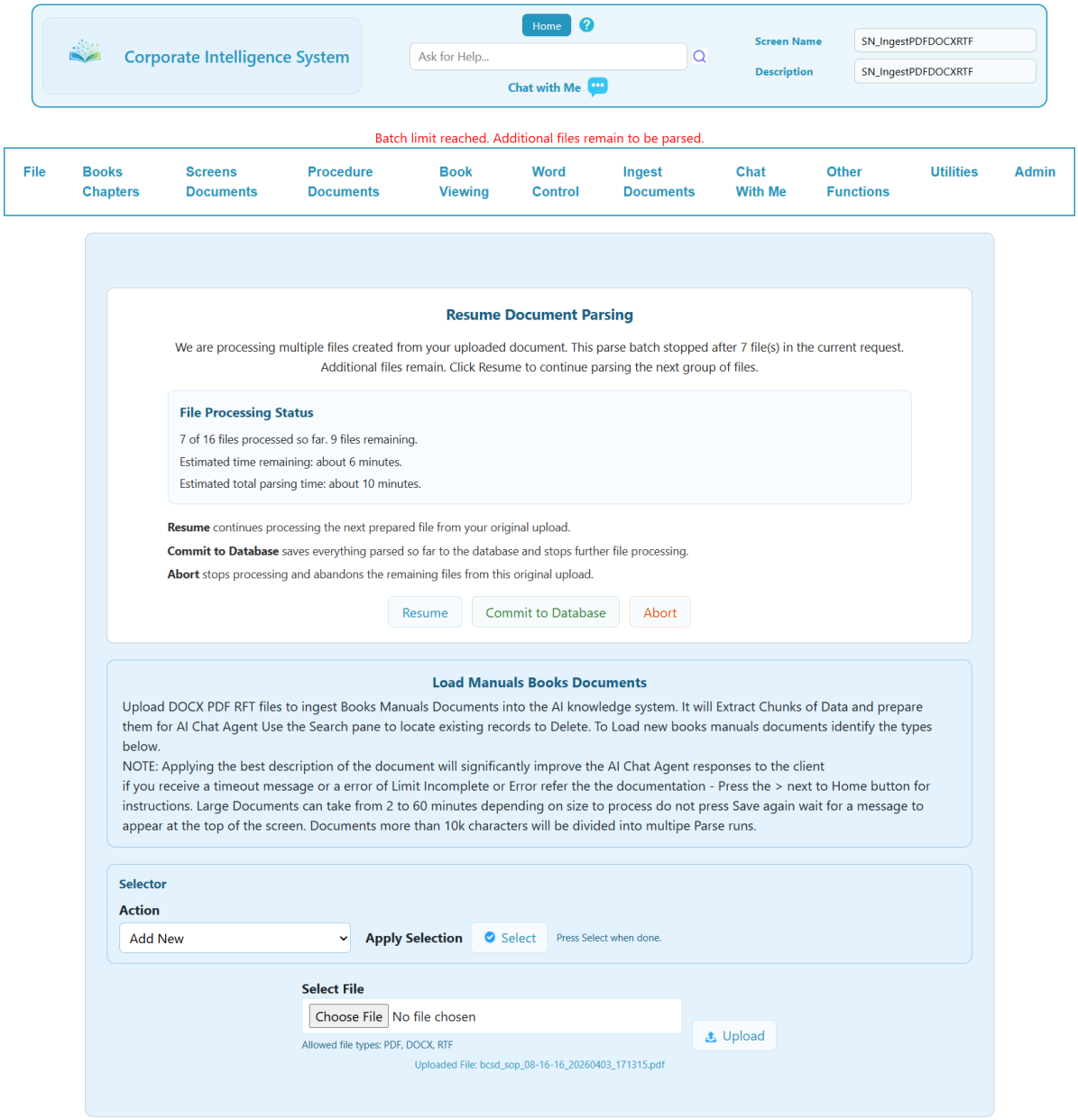


Figure: Resume Parsing.

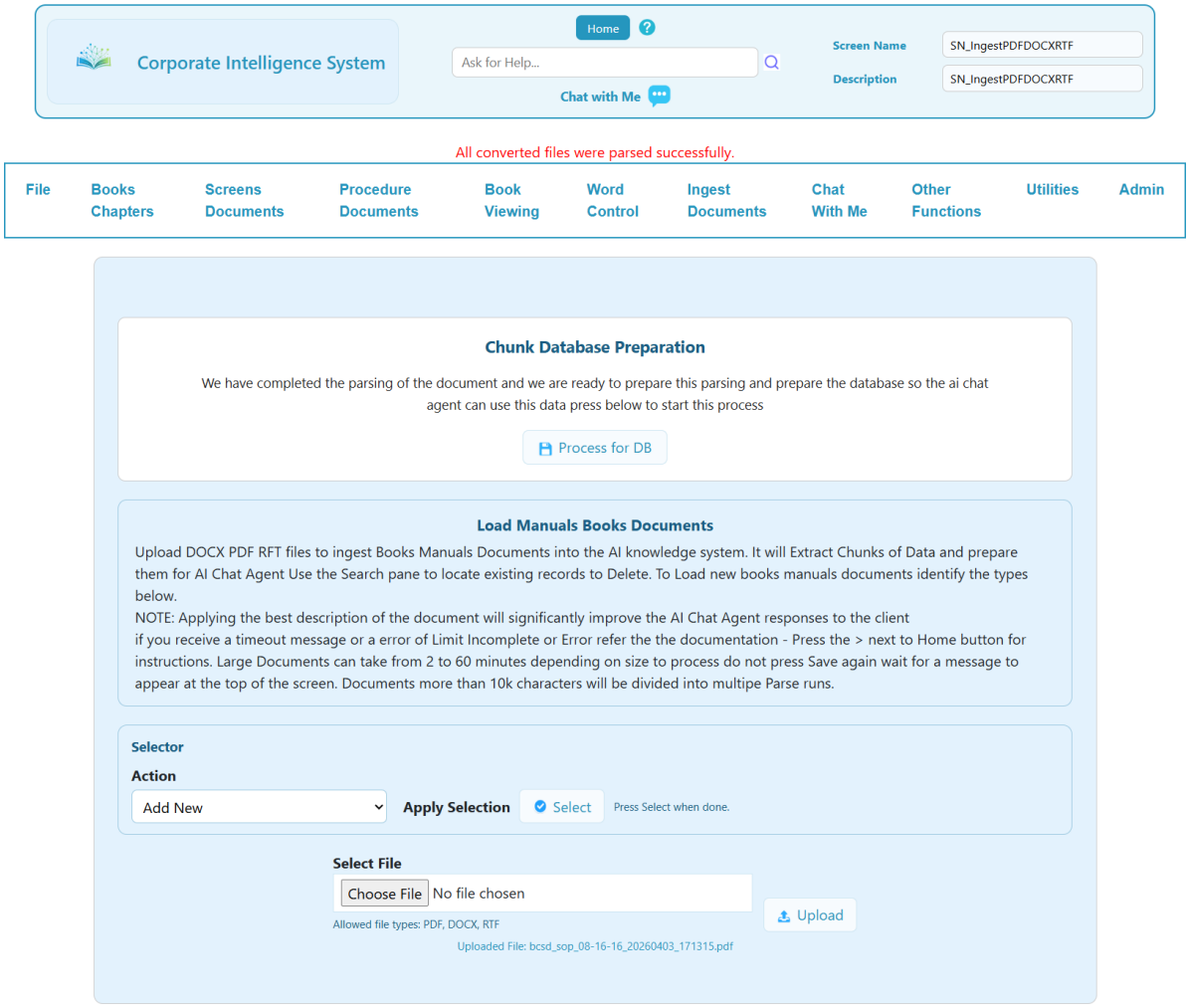


Figure: Commit Parse to Database Chunks.

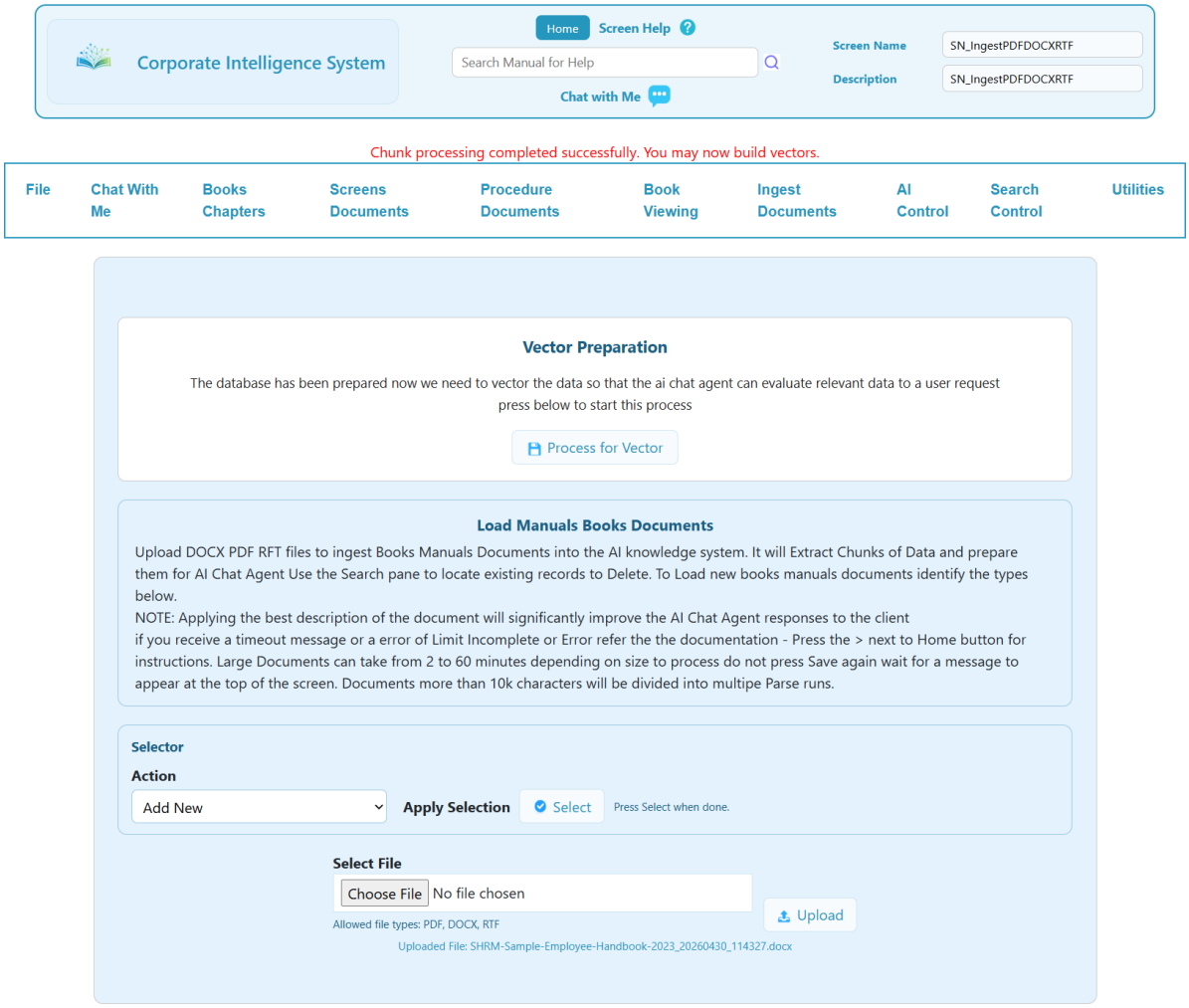


Figure: Vector for Ai Chat Agent.

ButtonsAndActions

Select chooses the workflow path based on the selected mode.

Add New opens the upload path for a new large document.

Search Delete opens the search path so previously loaded documents can be reviewed or removed.

Upload sends the selected PDF, DOCX, or RTF file to the temporary upload area and starts conversion into staged text files.

Search runs the search criteria and displays matching loaded documents in the grid.

Reset clears the search criteria and hides the result grid until a new search is run.

Delete removes the selected loaded document record and its related ingest content through the delete router.

Download opens the original stored upload file in a separate window so the source document can be reviewed.

Clear clears the detail pane fields.

Save validates the detail pane and starts a new parse run.

Resume Parse continues a staged parse run when more converted segment files remain to be processed.

Abort Parse stops the prior staged parse request and clears the current parse state.

Commit Parsed Data closes out the resume cycle and prepares parsed content for database commit.

Chunk writes the parsed content into the database as document, source, and chunk records.

Vector builds semantic search vectors for the chunked content.

FieldsOrSettings

Document Format identifies the incoming file format and should match the uploaded source type.

Document Mode tells the system what general kind of document is being loaded.

Expected Document Class tells the system whether the material is a book, manual, standard, or other long structured content.

Audience identifies who the document is intended for.

Display Name is the main user-facing name for the document and should be short, specific, and searchable.

Page Count is used as a descriptive document property and should be entered when known.

Business Domain classifies the content area such as accounting, operations, maintenance, IT, compliance, or training.

Document Description is one of the most important fields on the screen.

Document Description should clearly explain what the document covers, what business area it supports, and what kinds of questions the Chat Agent should be able to answer from it.

Example description guidance: This manual explains daily property operations, tenant communication procedures, work order handling, approval steps, exception handling, and end of month follow-up for onsite staff and supervisors.

A weak description makes retrieval less precise.

A strong description improves downstream document identity, chunk relevance, and AI response quality.

KeysAndScope

This screen works with large uploaded freeform documents that become AI reference content.

The source upload is first stored in a temporary upload location.

The converted staged text files are written to a temporary download location for staged parse processing.

After chunk commit, the system creates permanent document and source records and then creates chunk records tied to those identities.

The original uploaded source file is later moved into permanent document file storage so it can still be downloaded from search results.

This screen is not intended for short one-off notes when a simpler ingest path is more appropriate.

RulesAndValidations

Only PDF, DOCX, and RTF files are allowed.

The maximum upload size is 1.5 MB.

A file must be selected before Upload is pressed.

The upload must contain a valid temporary upload file, file name, and file size.

The upload directory must be available.

The detail pane must validate before Save can start parse processing.

Display Name is required and should always be completed carefully.

Chunk cannot proceed unless parsed data is available.

Vectoring should be run only after chunking completes successfully.

If the process stops on a hard error, do not keep pressing later buttons.

Correct the original file, reformat it if needed, break it into smaller files when appropriate, and then restart the load from the beginning.

DownstreamEffects

Upload creates a temporary staged ingest setup.

Save starts the parse loop and may create multiple staged API parse requests behind the scenes.

Resume Parse continues that staged processing until the full document is parsed or an error stops the run.

Commit Parsed Data marks the parsed material as ready for database commit.

Chunk creates document, source, and chunk rows in the database.

Vector adds semantic retrieval support for those chunks.

After vectoring completes, the loaded document becomes more useful to the Chat Agent for retrieval-augmented answers.

Examples

Example 1: Load a 120 page accounting policy manual so the Chat Agent can answer questions about approval thresholds, journal correction rules, close procedures, and supporting documentation requirements.

Example 2: Load an IT operations handbook so the Chat Agent can answer questions about restart procedures, monitoring standards, backup checks, escalation paths, and maintenance windows.

Example 3: Load a property operations manual so the Chat Agent can answer questions about inspections, maintenance coordination, tenant communications, move-in tasks, and after-hours response procedures.

Example 4: Search for an older loaded manual, download the original source file for review, delete the old version, then reload a corrected edition.

Troubleshooting

If the screen shows Action is required, no mode was selected before pressing Select.

If Upload failed - no file selected appears, choose a file and upload again.

If Upload failed - only PDF, DOCX, and RTF files are allowed appears, convert the source document into a supported format and try again.

If the file is reported as too large, split the original material into smaller source files and load them separately.

If Validation failed for Detail appears, review the detail pane and complete the required fields with better document information.

If Unable to start parse process appears, stop and review the original document format before retrying.

If Unable to resume parse process appears, review the prior parse state and message text before retrying.

If No parsed data available for chunk processing appears, parsing did not complete to a valid commit-ready state.

If Chunk processing failed appears, do not continue to Vector.

If a Vector error appears, the chunk data exists but semantic retrieval is not yet ready.

Examples of hard errors include Upload failed - cannot move uploaded file to tempupload, Upload failed - only PDF DOCX and RTF files are allowed, and Chunk processing failed.

When a hard error occurs, processing should be treated as stopped. Reformat the original document, simplify the source if needed, and start over with a fresh load.

SecurityAndAccess

This screen is controlled by security group 22.

Read access is required to open the screen.

Write access is required for upload, delete, parse, chunk, and vector actions.

Users without sufficient rights may be able to view the screen but will not be allowed to perform update actions.

400.000 - Loading Letters Memos PDF DOCX RTF

Screen | 2026-05-11 00:00:00 SN_IngestLetter

300.000 Loading PDF DOCX RTF letters and memoranda for Chat Agent

Purpose

Use this screen to load business letters, memoranda, and similar correspondence into the AI knowledge base so the Chat Agent can search, retrieve, and answer from them more effectively.

This screen is intended for business correspondence such as formal letters, interoffice memoranda, notices, client communications, internal communications, and other freeform business documents that should become searchable AI reference content.

Use this screen when the original letter or memorandum should be converted, parsed, chunked, and vectored in controlled stages, including cases where the PDF source may exceed the normal one-step size comfort range.

Supported upload types are PDF, DOCX, and RTF.

The maximum upload size for this screen is 500 KB per file.

After upload, the system converts the document to text and divides it into smaller text files of about 10 KB each so the AI knowledge pipeline can process the material in stable, controlled stages.

Processing

This screen has two main paths.

The first path is Search and Delete for reviewing documents that were previously loaded, downloading the original stored file, or deleting a document before reloading a corrected version.

The second path is Add New for uploading a new file, completing the detail pane, starting parse processing, resuming parsing if more staged files remain, committing parsed content, chunking the content into database records, and then building vectors.

In Add New mode, select the source file and upload it first.

After upload, the detail pane must be completed before parsing begins.

The detail pane is important because it tells the system what kind of correspondence is being loaded and improves how the AI classifies and retrieves the knowledge later.

All detail fields should be completed carefully.

Business Domain, Display Name, and a strong Document Description are especially important because they improve how the Chat Agent identifies the topic and returns better, more precise responses.

The description should explain what the correspondence contains, who it is for, and what kinds of questions it should help answer.

A good description is not a short title. It should summarize the correspondence in clear business language.

Before parsing begins, the system inserts important header data such as recipient, sender, subject, date, description, and business domain into the staged text so that downstream chunking and keyword generation have better context.

After the detail pane is saved, the system starts a new segmented parse run.

The parse stage processes the converted text files in sequence.

The system may process up to 7 staged files in one pass.

If more staged files remain, the system will stop at a controlled checkpoint and present Resume Parse so processing can continue from the next point.

Resume is a normal continuation step for larger letters, memoranda, or PDF correspondence and does not mean the document failed.

When parsing reaches a successful end point, the screen prepares the parsed content for commit.

Commit Parsed Data finalizes the parsed result so it is ready to be written into the chunk pipeline.

Chunk creates the document, source, and chunk records in the database.

After chunking completes successfully, the Vector step becomes available.

Vectoring converts each chunk into a semantic numeric representation that helps the Chat Agent find related meaning even when the user does not use the exact words stored in the document.

Without vectors, retrieval depends more heavily on direct text matching.

With vectors, retrieval is improved because the system can locate related ideas, not only exact phrases.

WhereToFind

Main Menu to Ingest Documents to Ingest Letters and Memoranda.

Images

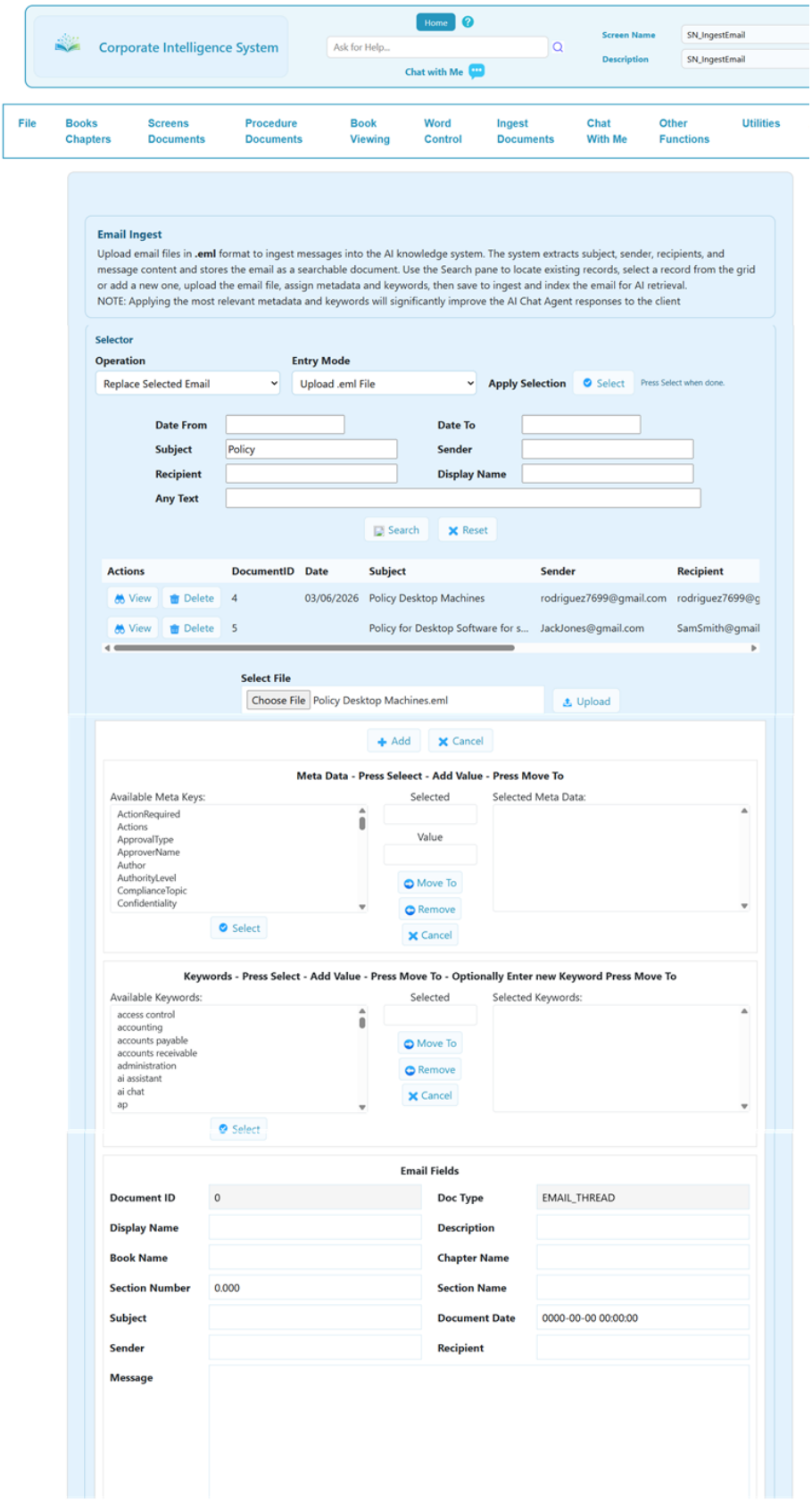

Corporate Intelligence System
Home
Ask for Help...
Chat with Me
Screen Name
SN_IngestEmail
Description
SN_IngestEmail
File
Books Chapters
Screens Documents
Procedure Documents
Book Viewing
Word Control
Ingest Documents
Chat With Me
Other Functions
Utilities
Email Ingest
Upload email files in .eml format to ingest messages into the AI knowledge system. The system extracts subject, sender, recipients, and message content and stores the email as a searchable document. Use the Search pane to locate existing records, select a record from the grid or add a new one, upload the email file, assign metadata and keywords, then save to ingest and index the email for AI retrieval.
NOTE: Applying the most relevant metadata and keywords will significantly improve the AI Chat Agent responses to the client
Selector
Operation
Replace Selected Email
Entry Mode
Upload .eml File
Apply Selection
Select
Press Select when done.
Date From
Date To
Subject
Policy
Sender
Recipient
Display Name
Any Text
Search
Reset
Actions
DocumentID
Date
Subject
Sender
Recipient
View
Delete
4
03/06/2026
Policy Desktop Machines
rodriguez7699@gmail.com
rodriguez7699@g
View
Delete
5
Policy for Desktop Software for s...
JackJones@gmail.com
SamSmith@gmail
Select File
Choose File
Policy Desktop Machines.eml
Upload
Add
Cancel
Meta Data - Press Seleect - Add Value - Press Move To
Available Meta Keys:
ActionRequired
Actions
ApprovalType
ApproverName
Author
AuthorityLevel
ComplianceTopic
Confidentiality
Selected
Value
Move To
Remove
Cancel
Selected Meta Data:
Select
Keywords - Press Select - Add Value - Press Move To - Optionally Enter new Keyword Press Move To
Available Keywords:
access control
accounting
accounts payable
accounts receivable
administration
ai assistant
ai chat
ap
Selected
Move To
Remove
Cancel
Selected Keywords:
Select
Email Fields
Document ID
0
Doc Type
EMAIL_THREAD
Display Name
Description
Book Name
Chapter Name
Section Number
0.000
Section Name
Subject
Document Date
0000-00-00 00:00:00
Sender
Recipient
Message

Figure: Search for Delete Download.

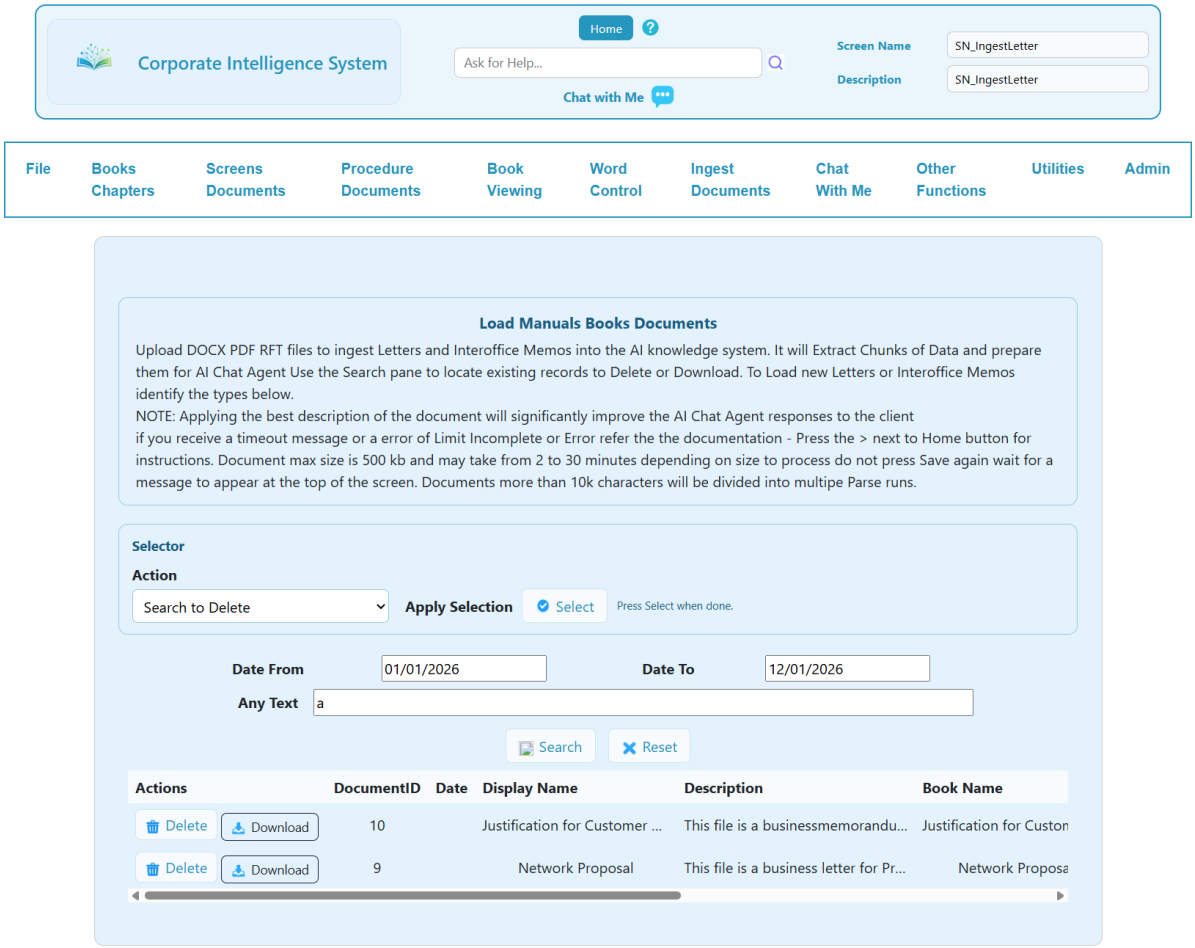


Figure: Search for Delete Download.

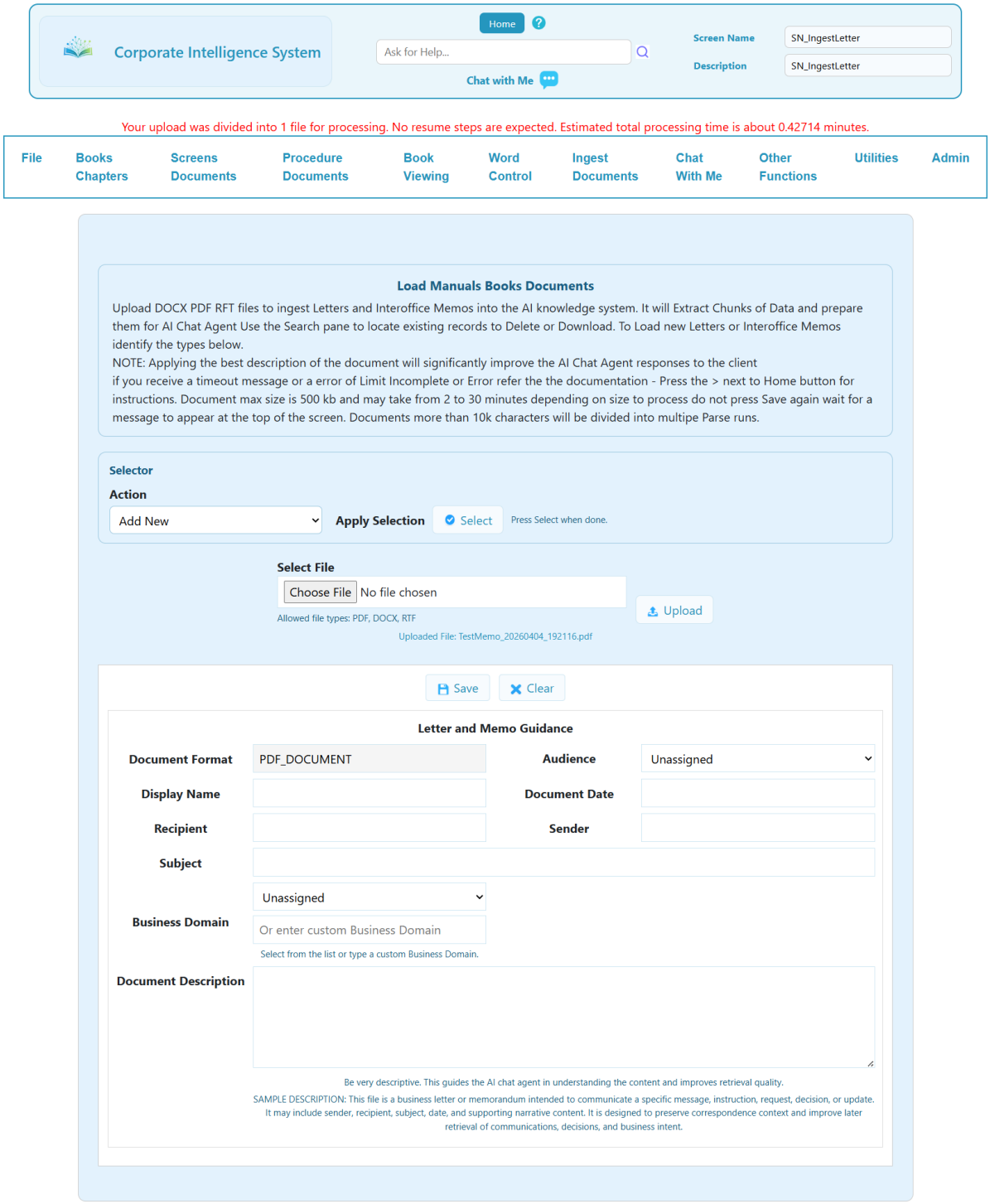


Figure: Upload File.

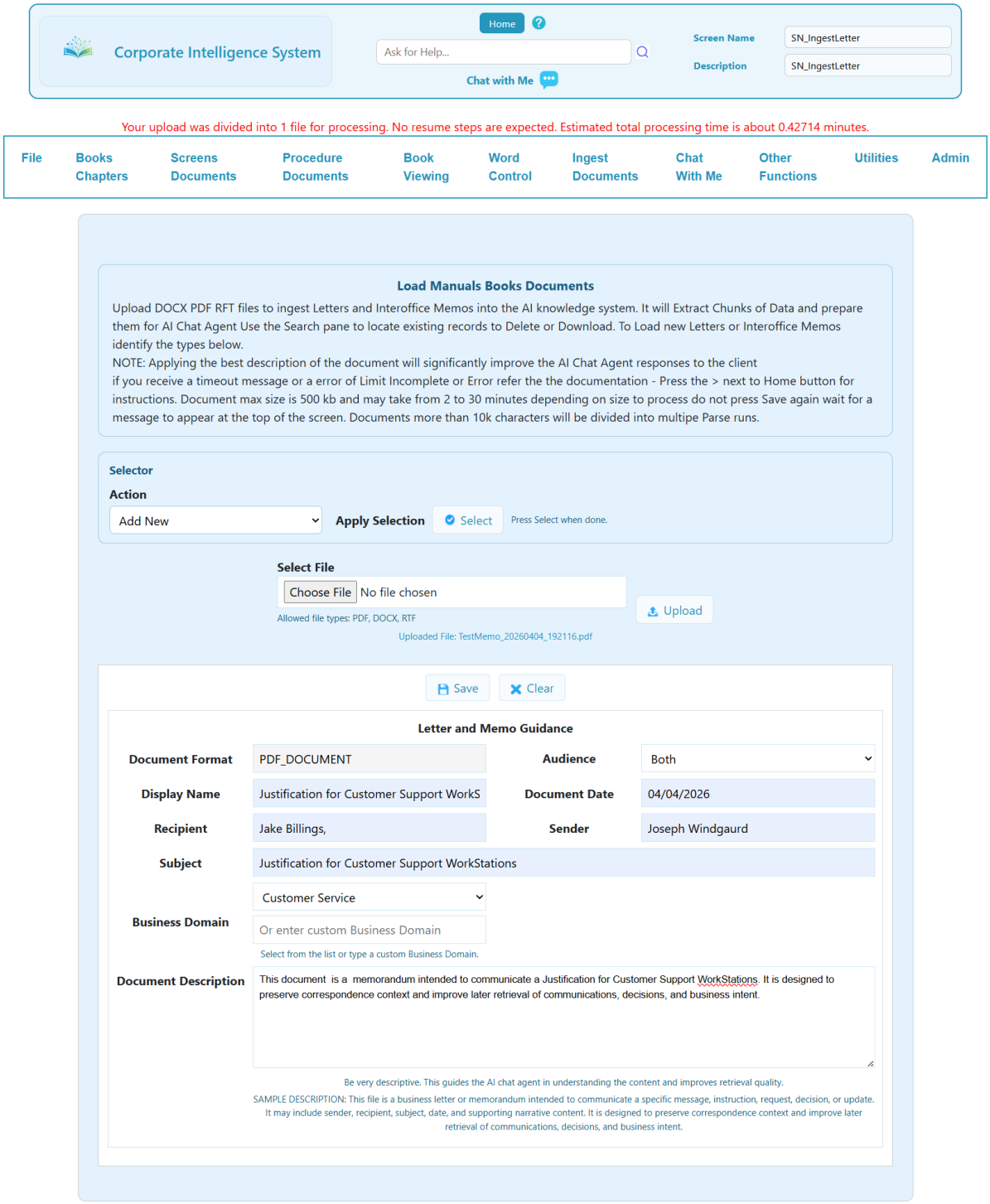


Figure: Detail Screen.

Figure: Commit Parse to Database Chunks.

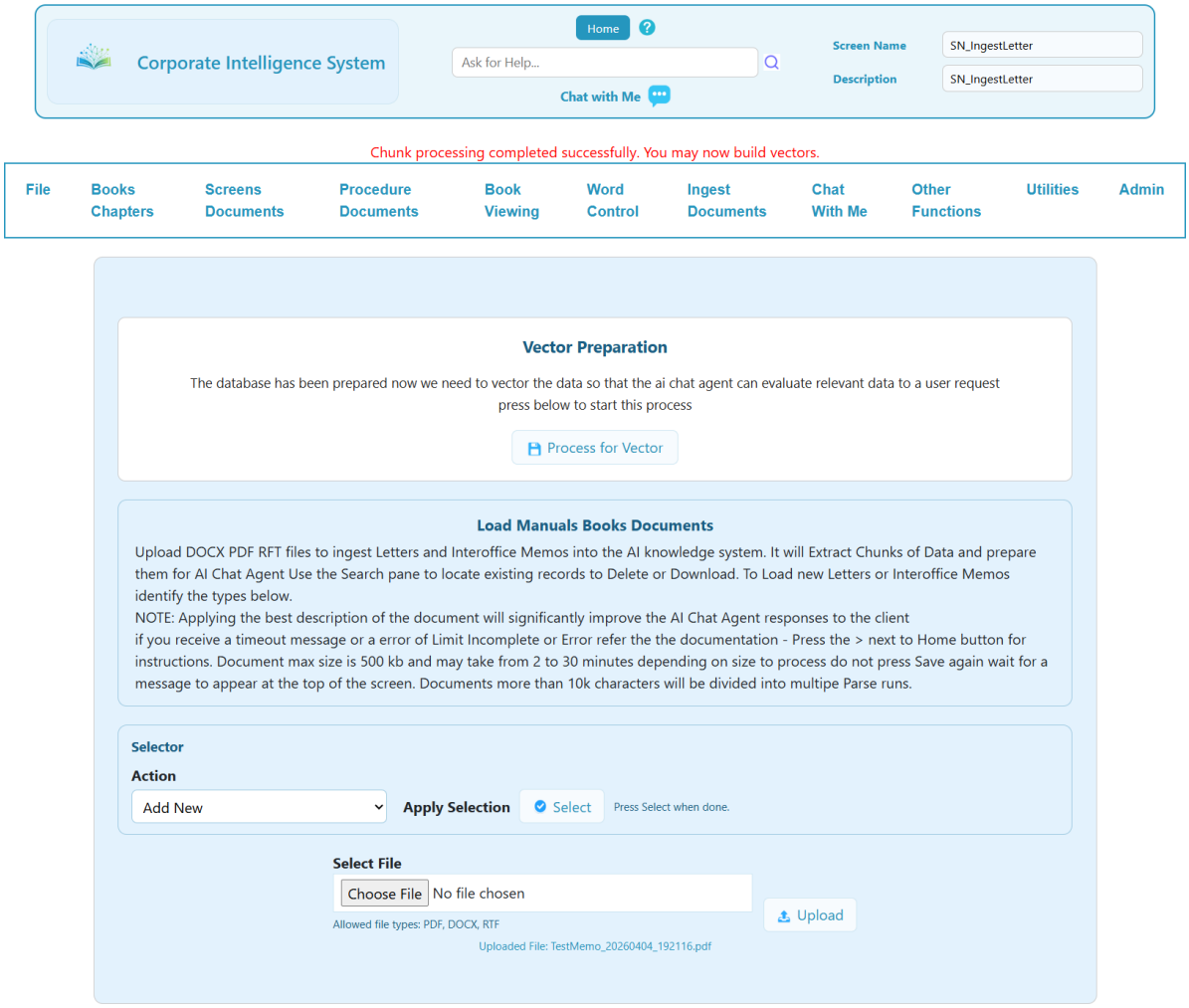


Figure: Vector for Ai Chat Agent.

ButtonsAndActions

Select chooses the workflow path based on the selected mode.

Add New opens the upload path for a new letter or memorandum.

Search Delete opens the search path so previously loaded documents can be reviewed or removed.

Upload sends the selected PDF, DOCX, or RTF file to the temporary upload area and starts conversion into staged text files.

Search runs the search criteria and displays matching loaded documents in the grid.

Reset clears the search criteria and hides the result grid until a new search is run.

Delete removes the selected loaded document record and its related ingest content through the delete router.

Download opens the original stored upload file in a separate window so the source document can be reviewed.

Clear clears the detail pane fields.

Save validates the detail pane and starts a new parse run.

Resume Parse continues a staged parse run when more converted segment files remain to be processed.

Abort Parse stops the prior staged parse request and clears the current parse state.

Commit Parsed Data closes out the resume cycle and prepares parsed content for database commit.

Chunk writes the parsed content into the database as document, source, and chunk records.

Vector builds semantic search vectors for the chunked content.

FieldsOrSettings

Document Format identifies the incoming file format and should match the uploaded source type.

Audience identifies who the correspondence is intended for.

Display Name is the main user-facing name for the document and should be short, specific, and searchable.

Business Domain classifies the content area such as accounting, operations, maintenance, IT, compliance, training, legal, administration, or another business topic.

Document Description is one of the most important fields on the screen.

Document Description should clearly explain what the letter or memorandum covers, what business area it supports, and what kinds of questions the Chat Agent should be able to answer from it.

Recipient identifies who the correspondence is addressed to.

Sender identifies who issued or sent the correspondence.

Subject identifies the main topic of the letter or memorandum.

Date identifies the document date for the correspondence record.

Example description guidance: This memorandum explains the proposed equipment replacement project, identifies the operational problems with the current equipment, summarizes estimated costs and phases, and supports questions about budget, maintenance, timing, and business justification.

A weak description makes retrieval less precise.

A strong description improves downstream document identity, chunk relevance, and AI response quality.

KeysAndScope

This screen works with uploaded letters, memoranda, and similar business correspondence that become AI reference content.

The source upload is first stored in a temporary upload location.

The converted staged text files are written to a temporary download location for staged parse processing.

After chunk commit, the system creates permanent document and source records and then creates chunk records tied to those identities.

The original uploaded source file is later moved into permanent document file storage so it can still be downloaded from search results.

This screen is intended for correspondence-style documents rather than large manuals and books that belong in the freeform manual and book ingest process.

RulesAndValidations

Only PDF, DOCX, and RTF files are allowed.

The maximum upload size is 500 KB.

A file must be selected before Upload is pressed.

The upload must contain a valid temporary upload file, file name, and file size.

The upload directory must be available.

The detail pane must validate before Save can start parse processing.

Display Name is required and should always be completed carefully.

Chunk cannot proceed unless parsed data is available.

Vectoring should be run only after chunking completes successfully.

If the process stops on a hard error, do not keep pressing later buttons.

Correct the original file, reformat it if needed, break it into smaller files when appropriate, and then restart the load from the beginning.

DownstreamEffects

Upload creates a temporary staged ingest setup.

Save starts the parse loop and may create multiple staged API parse requests behind the scenes.

Resume Parse continues that staged processing until the full document is parsed or an error stops the run.

Commit Parsed Data marks the parsed material as ready for database commit.

Chunk creates document, source, and chunk rows in the database.

Vector adds semantic retrieval support for those chunks.

After vectoring completes, the loaded document becomes more useful to the Chat Agent for retrieval-augmented answers.

Examples

Example 1: Load a formal vendor letter so the Chat Agent can answer questions about pricing, implementation phases, maintenance costs, delivery expectations, and approval considerations.

Example 2: Load an internal memorandum so the Chat Agent can answer questions about business justification, operational impact, timeline, responsibilities, and next steps.

Example 3: Load a client communication or business notice so the Chat Agent can answer questions about dates, sender intent, recipient obligations, and required follow-up.

Example 4: Search for an older loaded letter or memorandum, download the original source file for review, delete the old version, then reload a corrected edition.

Troubleshooting

If the screen shows Action is required, no mode was selected before pressing Select.

If Upload failed - no file selected appears, choose a file and upload again.

If Upload failed - only PDF, DOCX, and RTF files are allowed appears, convert the source document into a supported format and try again.

If the file is reported as too large, split the original material into smaller source files and load them separately.

If Validation failed for Detail appears, review the detail pane and complete the required fields with better correspondence information.

If Unable to start parse process appears, stop and review the original document format before retrying.

If Unable to resume parse process appears, review the prior parse state and message text before retrying.

If No parsed data available for chunk processing appears, parsing did not complete to a valid commit-ready state.

If Chunk processing failed appears, do not continue to Vector.

If a Vector error appears, the chunk data exists but semantic retrieval is not yet ready.

Examples of hard errors include Upload failed - cannot move uploaded file to tempupload, Upload failed - only PDF DOCX and RTF files are allowed, and Chunk processing failed.

When a hard error occurs, processing should be treated as stopped. Reformat the original document, simplify the source if needed, and start over with a fresh load.

SecurityAndAccess

This screen is controlled by program security and related update access settings.

Read access is required to open the screen.

Write access is required for upload, delete, parse, chunk, and vector actions.

Users without sufficient rights may be able to view the screen but will not be allowed to perform update actions.

500.000 - Loading Spreadsheets for Chat Agent

Screen | 2026-05-11 00:00:00 SN_IngestXLSX

500.000 Loading Spreadsheets for Chat Agent

Purpose

Use this screen to load spreadsheet-based business data into the AI knowledge base so the Chat Agent can search, retrieve, and answer from worksheet content more effectively.

This screen is intended for structured spreadsheet material such as transaction listings, financial summaries, budgets, schedules, inventory records, operating reports, account detail, departmental summaries, audit support, and other worksheet-based business data.

Use this screen when the source material is best represented as spreadsheet rows and columns and should be converted, parsed, chunked, and vectored in stages.

Supported upload types are XLS and XLSX.

The maximum upload size for this screen is 1.5 MB per file.

After upload, the system converts the spreadsheet to structured text and divides it into smaller text files of about 10 KB each so the AI knowledge pipeline can process the material in stable, controlled stages.

The converted text preserves worksheet structure using sheet markers, row markers, and column-value lines so spreadsheet meaning is retained during parse and chunk processing.

Processing

This screen has two main paths.

The first path is Search and Delete for reviewing spreadsheets that were previously loaded, downloading the original stored file, or deleting a spreadsheet before reloading a corrected version.

The second path is Add New for uploading a new spreadsheet, completing the detail pane, starting parse processing, resuming parsing if more staged files remain, committing parsed content, chunking the content into database records, and then building vectors.

In Add New mode, select the source spreadsheet and upload it first.

After upload, the detail pane must be completed before parsing begins.

The detail pane is important because it tells the system what kind of spreadsheet is being loaded and improves how the AI classifies and retrieves the worksheet content later.

All detail fields should be completed carefully.

Business Domain, Display Name, and a strong Document Description are especially important because they improve how the Chat Agent identifies the topic and returns better, more precise responses.

The description should explain what the spreadsheet contains, what business area it supports, and what kinds of questions it should help answer.

A good description is not a short title. It should summarize the spreadsheet in clear business language.

After the detail pane is saved, the system starts a new segmented parse run.

The parse stage processes the converted text files in sequence.

The system may process up to 7 staged files in one pass.

If more staged files remain, the system will stop at a controlled checkpoint and present Resume Parse so processing can continue from the next point.

Resume is a normal continuation step for larger spreadsheets and does not mean the spreadsheet failed.

When parsing reaches a successful end point, the screen prepares the parsed content for commit.

Commit Parsed Data finalizes the parsed result so it is ready to be written into the chunk pipeline.

Chunk creates the document, source, and chunk records in the database.

After chunking completes successfully, the Vector step becomes available.

Vectoring converts each chunk into a semantic numeric representation that helps the Chat Agent find related meaning even when the user does not use the exact words stored in the spreadsheet.

Without vectors, retrieval depends more heavily on direct text matching.

With vectors, retrieval is improved because the system can locate related concepts, row patterns, and worksheet meaning, not only exact phrases.

WhereToFind

Main Menu to Ingest Documents to Ingest Spreadsheet XLS XLSX Data for Chat Agent.

Images

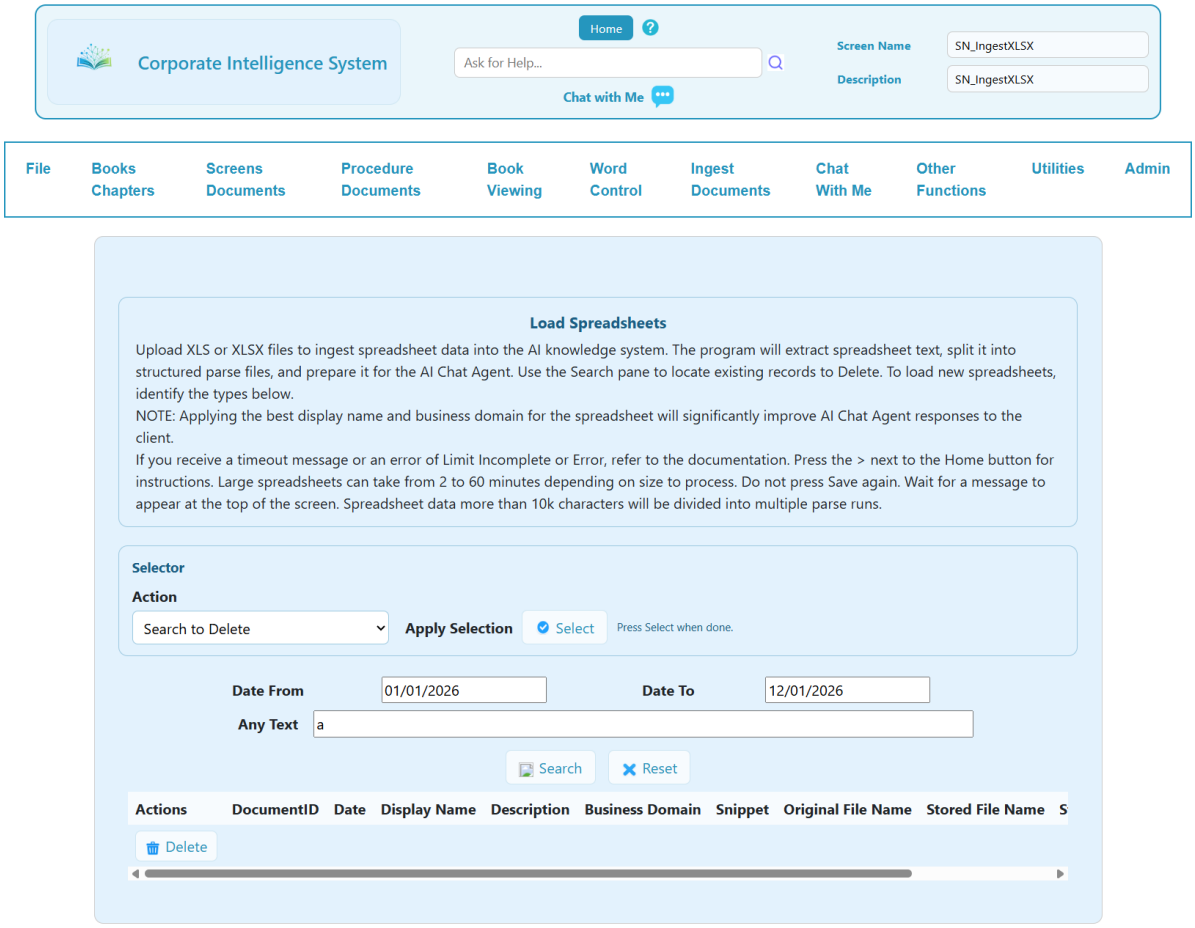


Figure: Search for Delete Download.

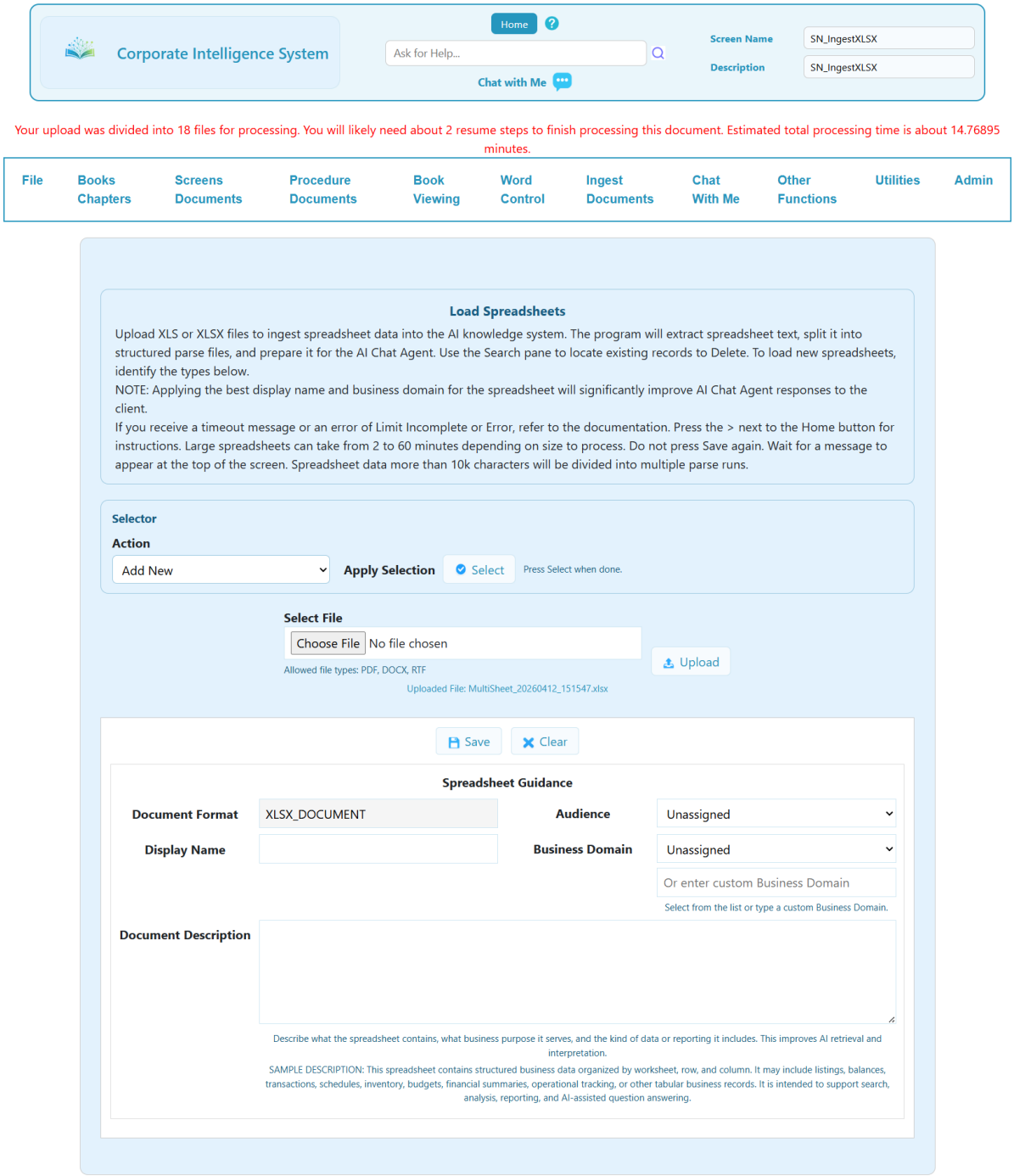


Figure: Upload Spreadsheet.

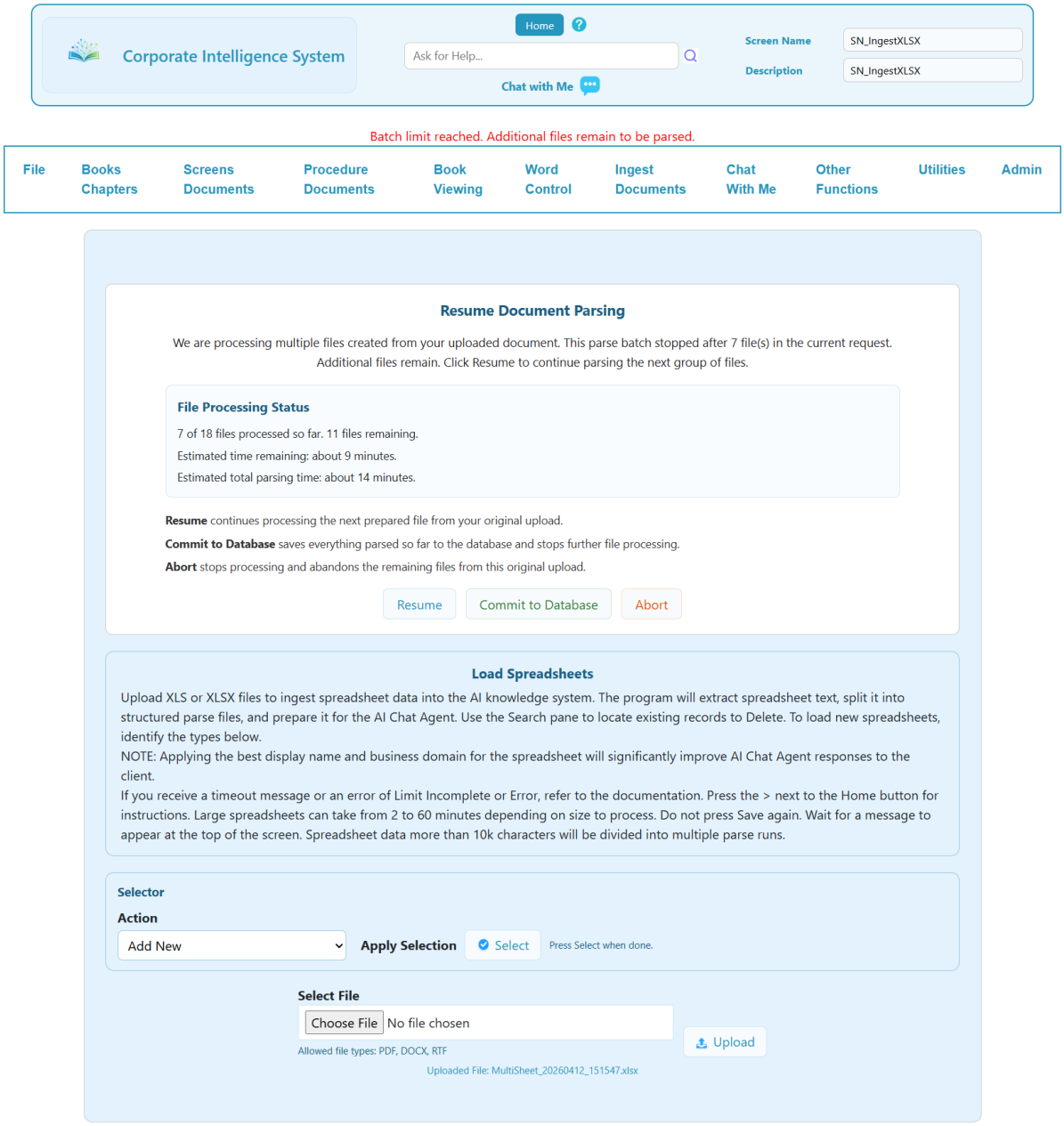


Figure: Resume Parsing.

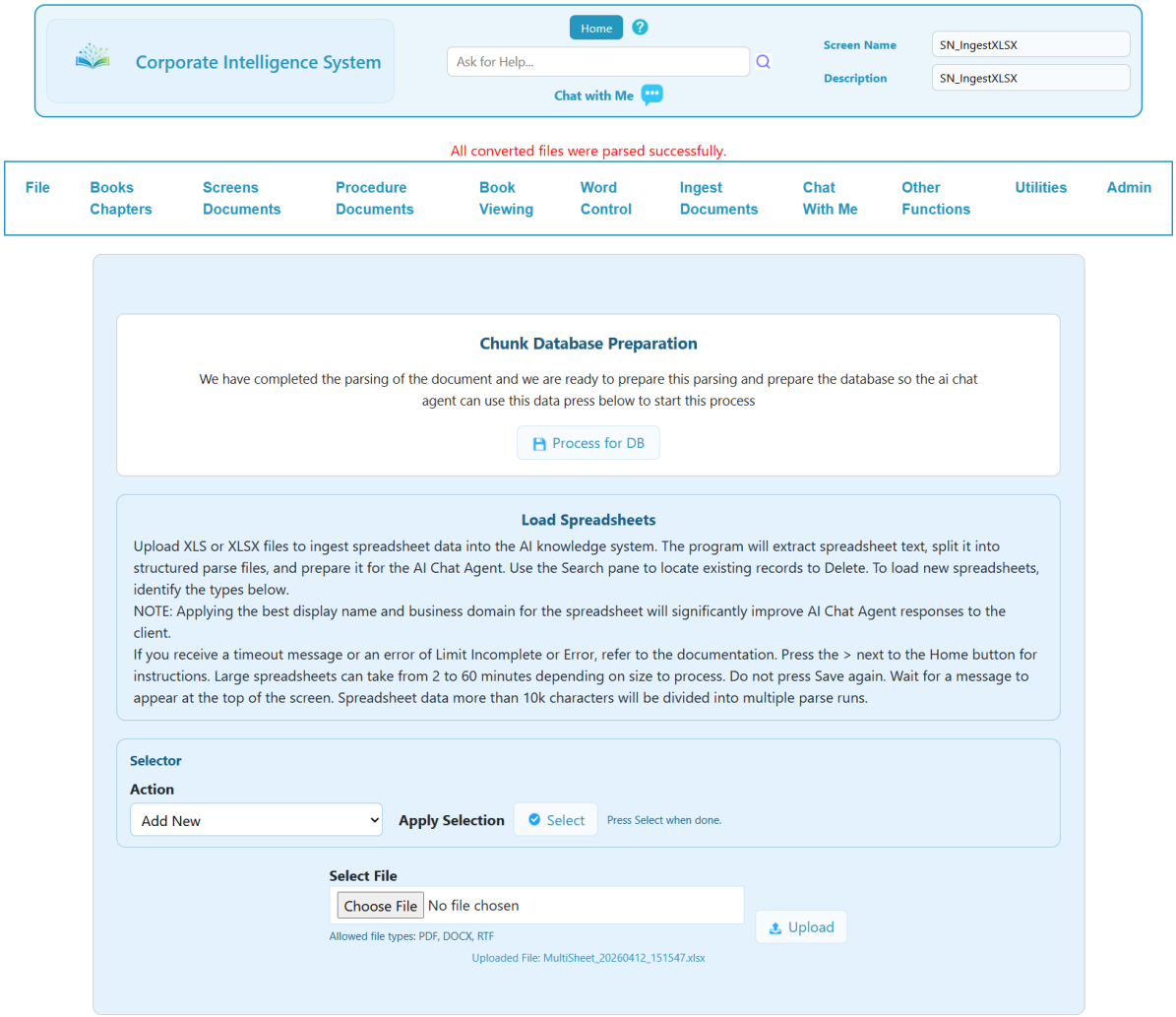


Figure: Commit Parse to Database Chunks.

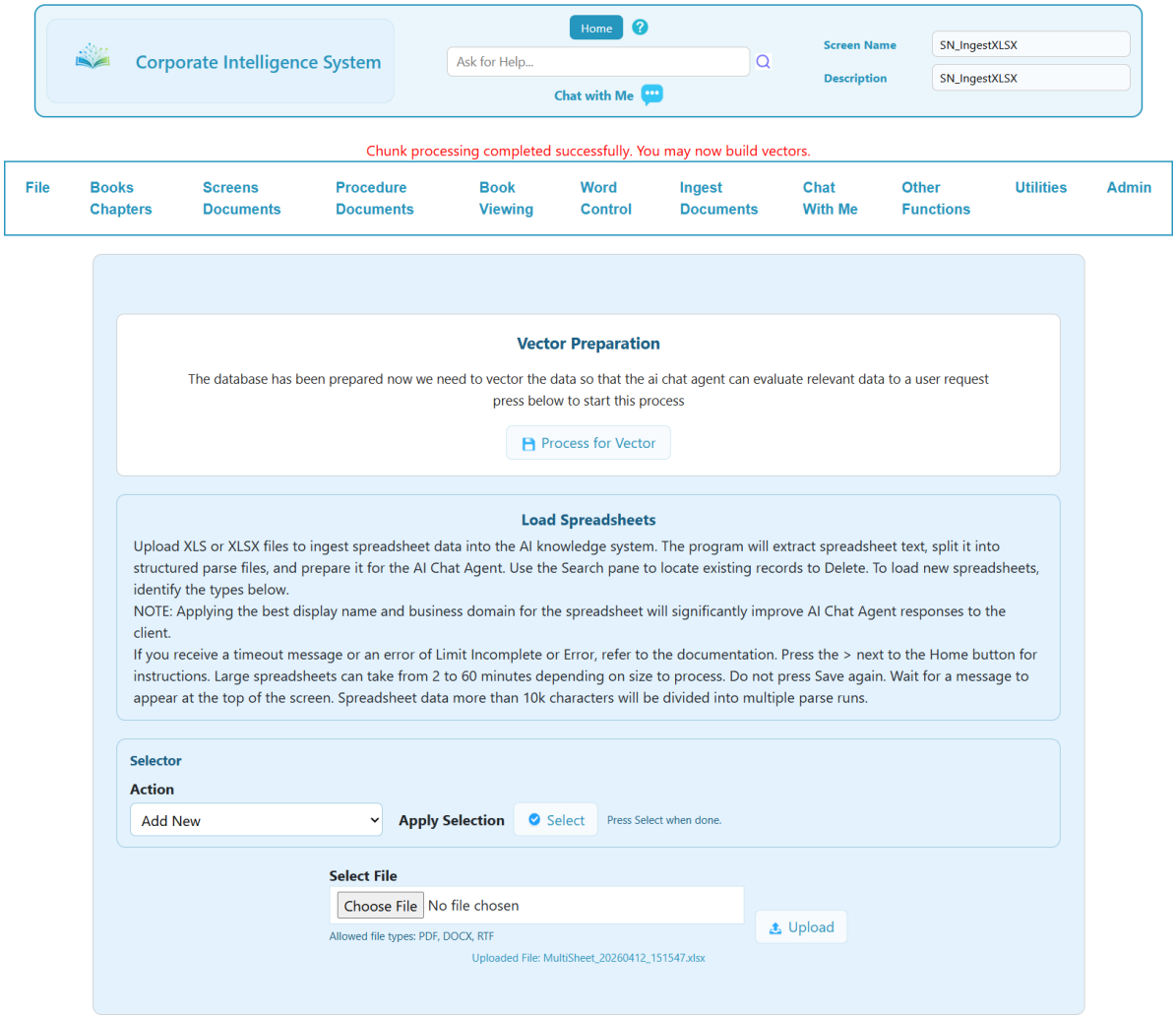


Figure: Vector for AI Chat Agent.

ButtonsAndActions

Select chooses the workflow path based on the selected mode.

Add New opens the upload path for a new spreadsheet.

Search Delete opens the search path so previously loaded spreadsheets can be reviewed or removed.

Upload sends the selected XLS or XLSX file to the temporary upload area and starts conversion into staged text files.

Search runs the search criteria and displays matching loaded spreadsheets in the grid.

Reset clears the search criteria and hides the result grid until a new search is run.

Delete removes the selected loaded spreadsheet record and its related ingest content through the delete router.

Download opens the original stored upload file in a separate window so the source spreadsheet can be reviewed.

Clear clears the detail pane fields.

Save validates the detail pane and starts a new parse run.

Resume Parse continues a staged parse run when more converted segment files remain to be processed.

Abort Parse stops the prior staged parse request and clears the current parse state.

Commit Parsed Data closes out the resume cycle and prepares parsed content for database commit.

Chunk writes the parsed content into the database as document, source, and chunk records.

Vector builds semantic search vectors for the chunked content.

FieldsOrSettings

Document Format identifies the incoming spreadsheet format and should match the uploaded source type.

Document Mode tells the system what general kind of spreadsheet is being loaded.

Expected Document Class tells the system whether the material is a report, ledger, schedule, budget, listing, or other structured spreadsheet content.

Audience identifies who the spreadsheet is intended for.

Display Name is the main user-facing name for the spreadsheet and should be short, specific, and searchable.

Page Count is generally not important for spreadsheets and may be used only when a source equivalent count is known.

Business Domain classifies the content area such as accounting, operations, maintenance, IT, compliance, sales, or inventory.

Document Description is one of the most important fields on the screen.

Document Description should clearly explain what the spreadsheet covers, what business area it supports, and what kinds of questions the Chat Agent should be able to answer from it.

Example description guidance: This spreadsheet contains financial expense transactions by date, category, account, department, approver, audit status, and GL code for reporting, search, and exception review.

A weak description makes retrieval less precise.

A strong description improves downstream document identity, chunk relevance, and AI response quality.

KeysAndScope

This screen works with uploaded spreadsheet documents that become AI reference content.

The source upload is first stored in a temporary upload location.

The converted staged text files are written to a temporary download location for staged parse processing.

Spreadsheet conversion preserves logical worksheet structure using markers such as Sheet, Row, and Col value lines so the AI can reason over tabular content.

After chunk commit, the system creates permanent document and source records and then creates chunk records tied to those identities.

The original uploaded spreadsheet is later moved into permanent document file storage so it can still be downloaded from search results.

This screen is not intended for short one-off notes when a simpler ingest path is more appropriate.

RulesAndValidations

Only XLS and XLSX files are allowed.

The maximum upload size is 1.5 MB.

A file must be selected before Upload is pressed.

The upload must contain a valid temporary upload file, file name, and file size.

The upload directory must be available.

The detail pane must validate before Save can start parse processing.

Display Name is required and should always be completed carefully.

Chunk cannot proceed unless parsed data is available.

Vectoring should be run only after chunking completes successfully.

If the process stops on a hard error, do not keep pressing later buttons.

Correct the original spreadsheet, simplify formulas or worksheet structure if needed, break it into smaller source files when appropriate, and then restart the load from the beginning.

DownstreamEffects

Upload creates a temporary staged ingest setup.

Save starts the parse loop and may create multiple staged API parse requests behind the scenes.

Resume Parse continues that staged processing until the full spreadsheet is parsed or an error stops the run.

Commit Parsed Data marks the parsed material as ready for database commit.

Chunk creates document, source, and chunk rows in the database.

Vector adds semantic retrieval support for those chunks.

After vectoring completes, the loaded spreadsheet becomes more useful to the Chat Agent for retrieval-augmented answers.

Examples

Example 1: Load a transaction spreadsheet so the Chat Agent can answer questions about expense categories, account activity, audit status, approvers, and GL codes.

Example 2: Load a budget workbook so the Chat Agent can answer questions about monthly targets, year totals, department comparisons, and budget versus actual trends.

Example 3: Load an inventory spreadsheet so the Chat Agent can answer questions about item counts, reorder points, locations, shortages, and movement history.

Example 4: Search for an older loaded spreadsheet, download the original source file for review, delete the old version, then reload a corrected edition.

Troubleshooting

If the screen shows Action is required, no mode was selected before pressing Select.

If Upload failed - no file selected appears, choose a file and upload again.

If Upload failed - only XLS and XLSX files are allowed appears, convert the source document into a supported spreadsheet format and try again.

If the file is reported as too large, split the original workbook into smaller source files and load them separately.

If Validation failed for Detail appears, review the detail pane and complete the required fields with better spreadsheet information.

If Unable to start parse process appears, stop and review the original spreadsheet structure before retrying.

If Unable to resume parse process appears, review the prior parse state and message text before retrying.

If No parsed data available for chunk processing appears, parsing did not complete to a valid commit-ready state.

If Chunk processing failed appears, do not continue to Vector.

If a Vector error appears, the chunk data exists but semantic retrieval is not yet ready.

Examples of hard errors include Upload failed - cannot move uploaded file to tempupload, Upload failed - only XLS and XLSX files are allowed, and Chunk processing failed.

When a hard error occurs, processing should be treated as stopped. Reformat the original spreadsheet, simplify the source if needed, and start over with a fresh load.

SecurityAndAccess

This screen is controlled by security group 25.

Read access is required to open the screen.

Write access is required for upload, delete, parse, chunk, and vector actions.

Users without sufficient rights may be able to view the screen but will not be allowed to perform update actions.

600.000 - Load Programs for AI Chat Agent

Screen | 2026-05-11 00:00:00 SN_IngestProgram

600.000 Loading Programs for Chat Agent

Purpose

Use this screen to load program and source-code files into the AI knowledge base so the Chat Agent can search, retrieve, and answer from application logic, screen flow, helper routines, database access patterns, and program structure more effectively.

This screen is intended for program files such as PHP, Python, JavaScript, TypeScript, SQL, HTML, CSS, shell scripts, batch files, PowerShell files, Java files, C# files, VB files, and other supported source-code documents.

Use this screen when the source material is application code, include files, routines, scripts, program modules, or technical source files that should be converted, parsed, chunked, and vectored in stages.

Supported upload types include PHP, PY, JS, TS, SQL, JAVA, CS, HTML, HTM, CSS, SH, BAT, CMD, PS1, and VB.

The maximum upload size for this screen is 1.5 MB per file.

After upload, the system converts the program file to plain text and divides it into smaller text files of about 10 KB each so the AI knowledge pipeline can process the material in stable, controlled stages.

The converted text preserves code content, comments, routines, includes, declarations, and other visible program structure so technical meaning is retained during parse and chunk processing.

Processing

This screen has two main paths.

The first path is Search and Select for reviewing programs that were previously loaded and selecting them for review or downstream actions.

The second path is Add New for uploading a new program file, completing the detail pane, starting parse processing, chunking the content into database records, and then building vectors.

In Add New mode, select the source program file and upload it first.

After upload, the detail pane must be completed before parsing begins.

The detail pane is important because it tells the system what type of program is being loaded and improves how the AI classifies and retrieves the source content later.

All detail fields should be completed carefully.

Program Type, Display Name, Business Domain, and a strong Document Description are especially important because they improve how the Chat Agent identifies the program topic and returns better, more precise responses.

The description should explain what the program does, what subsystem it supports, and what kinds of questions it should help answer.

A good description is not a short title. It should summarize the program in clear technical business language.

After the detail pane is saved, the system starts a new parse run.

The parse stage processes the converted text files in sequence.

The system sends staged program text to the API so routines, logic blocks, section headings, and keywords can be returned in structured chunk output.

When parsing reaches a successful end point, the screen prepares the parsed content for database commit.

Chunk creates the document, source, and chunk records in the database.

After chunking completes successfully, the Vector step becomes available.

Vectoring converts each chunk into a semantic numeric representation that helps the Chat Agent find related meaning even when the user does not use the exact words stored in the program.

Without vectors, retrieval depends more heavily on direct text matching.

With vectors, retrieval is improved because the system can locate related logic, routine purpose, code structure, field handling, and technical meaning, not only exact phrases.

WhereToFind

Main Menu to Ingest Documents to Ingest Program Files for Chat Agent.

Images

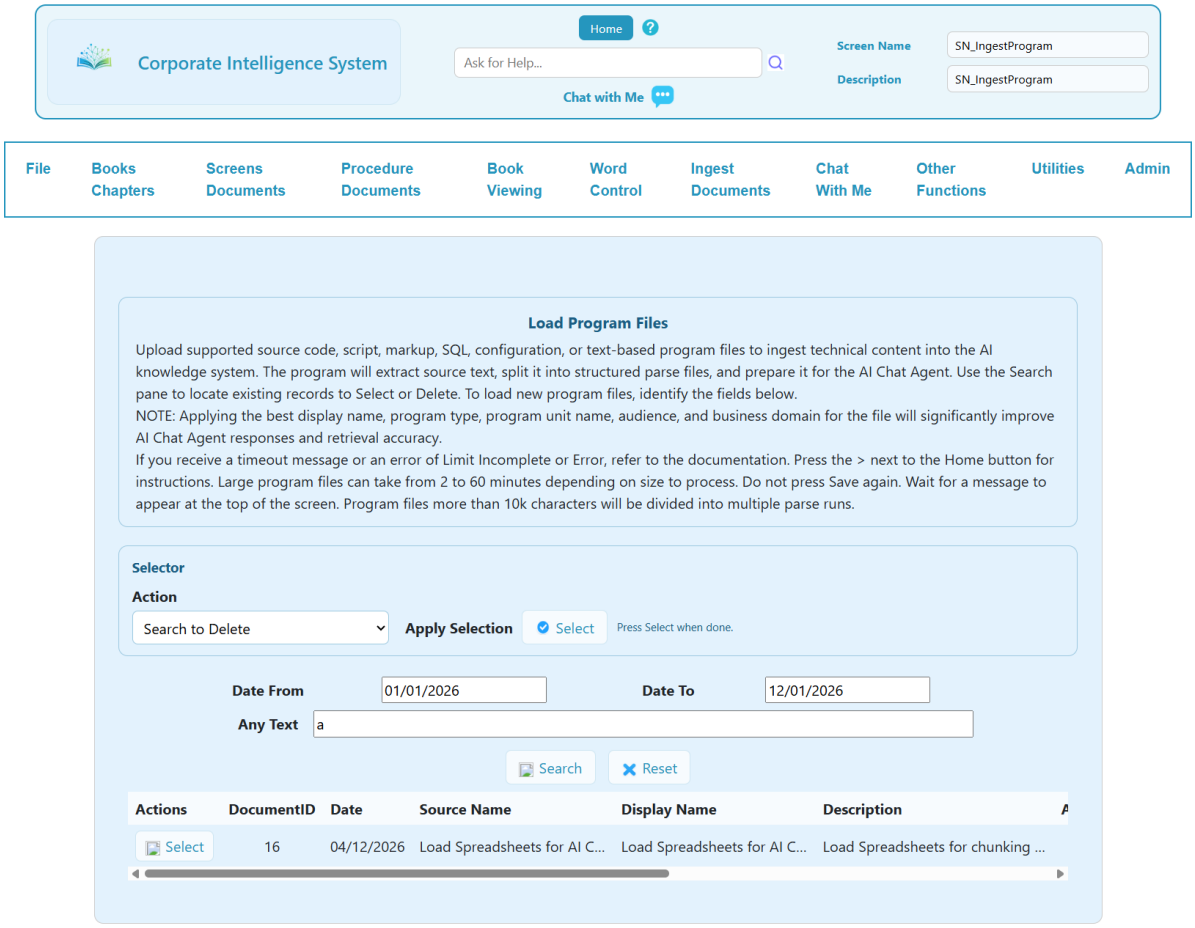


Figure: Search for Select.

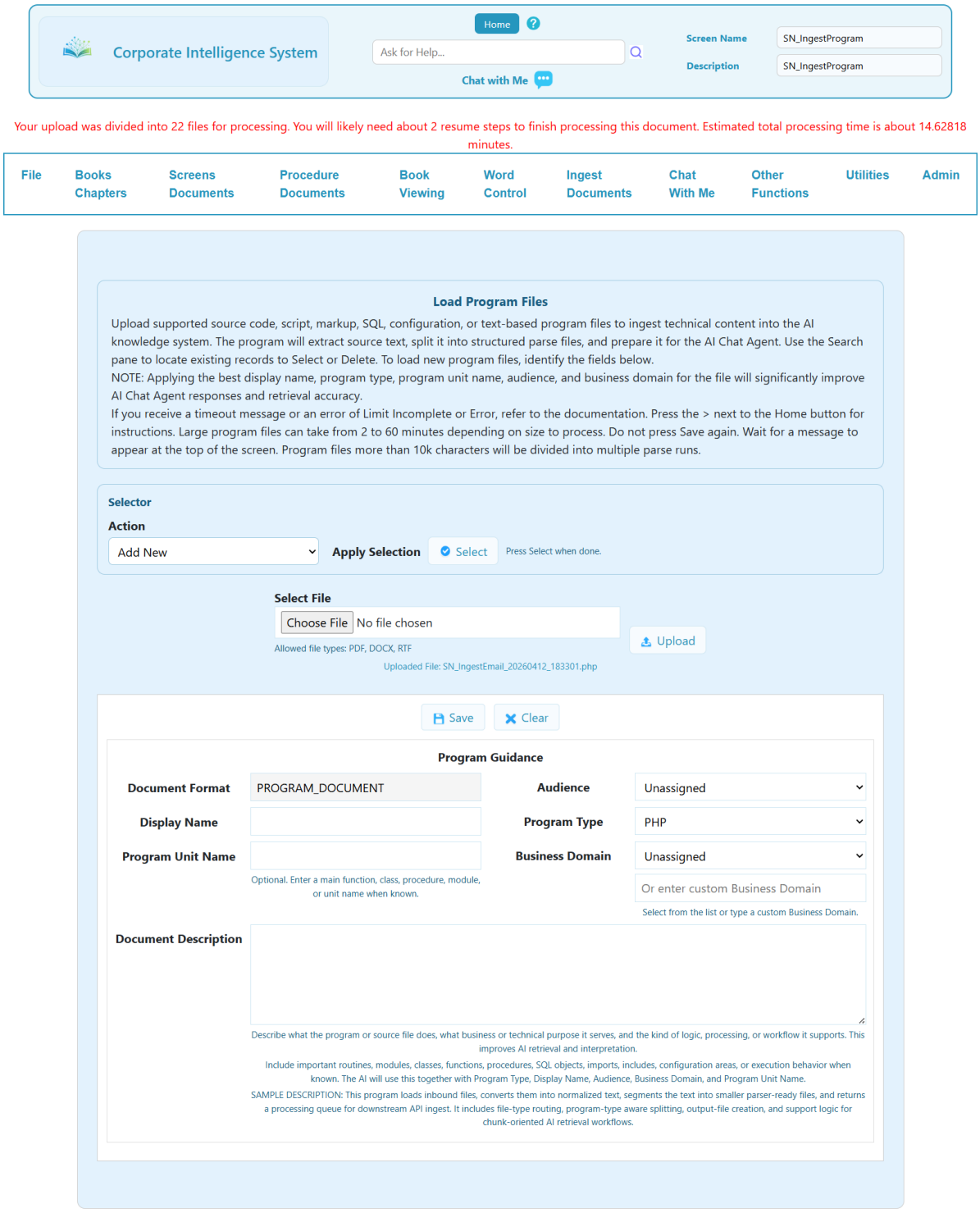


Figure: Upload Program File.

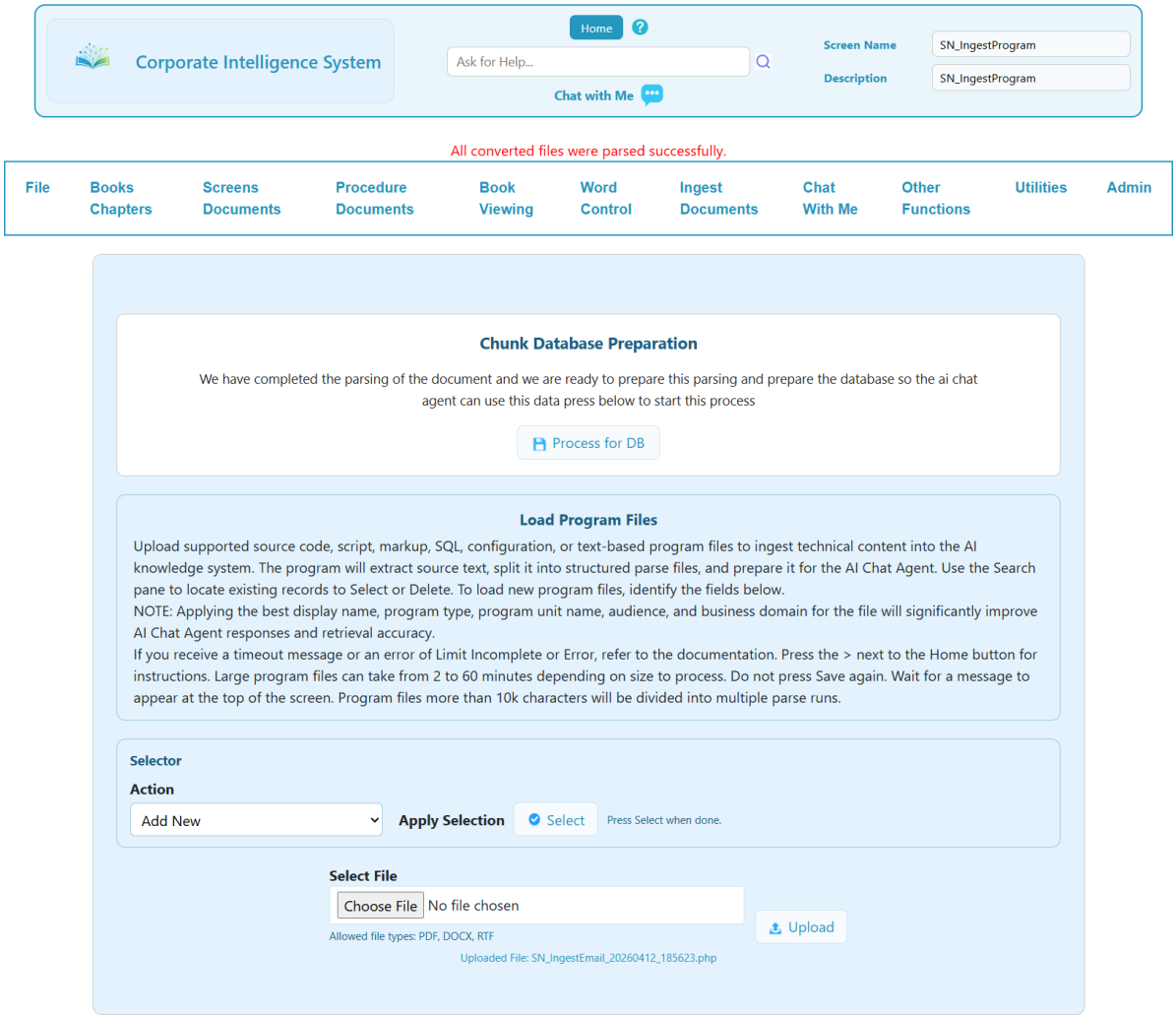


Figure: Commit Parse to Database Chunks.

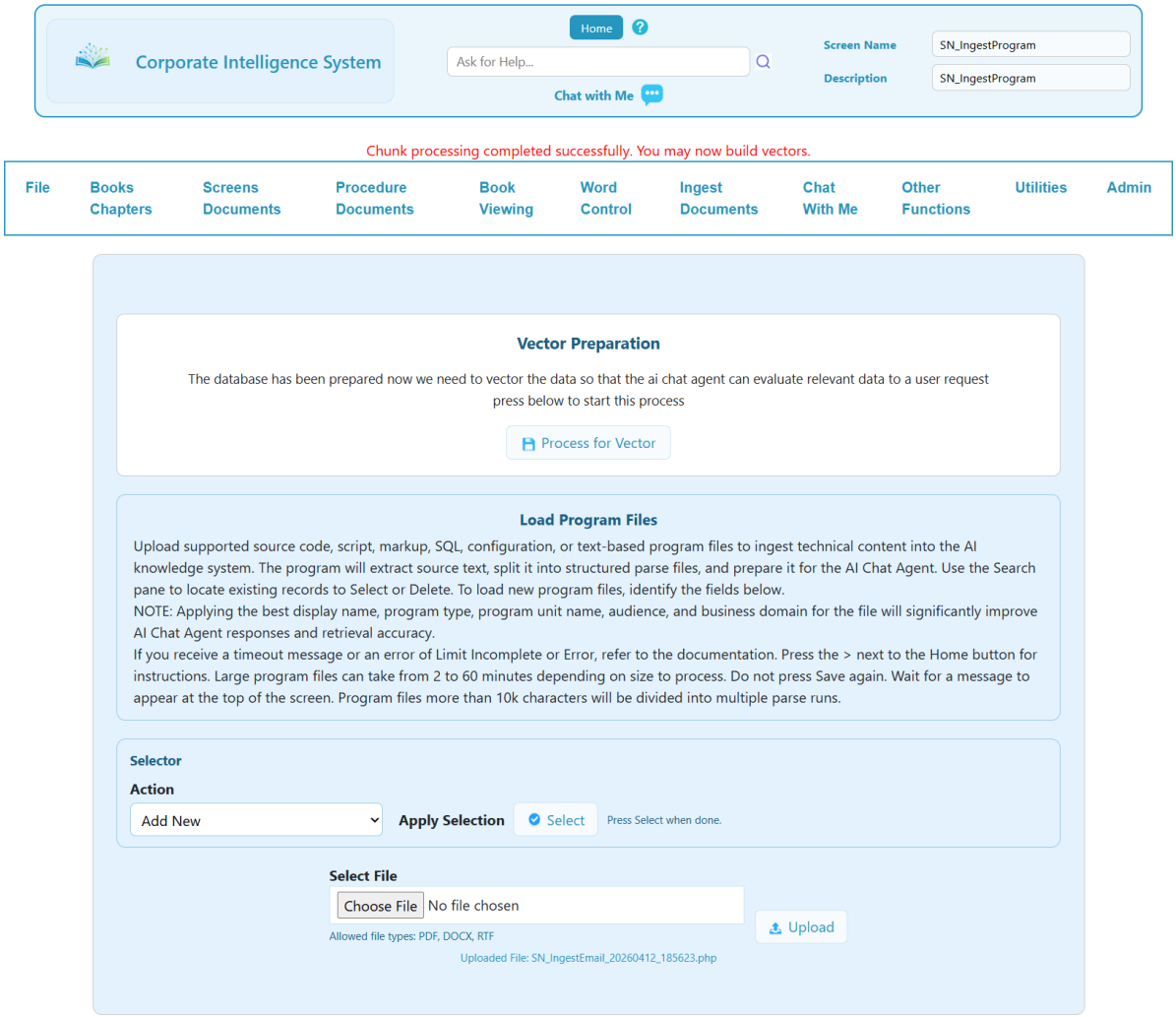


Figure: Vector for AI Chat Agent.

ButtonsAndActions

Select chooses the workflow path based on the selected mode.

Add New opens the upload path for a new program file.

Search Select opens the search path so previously loaded program files can be reviewed or selected.

Upload sends the selected source file to the temporary upload area and starts conversion into staged text files.

Search runs the search criteria and displays matching loaded program files in the grid.

Reset clears the search criteria and hides the result grid until a new search is run.

Select in the grid loads the selected record for review or downstream processing.

Clear clears the detail pane fields.

Save validates the detail pane and starts a new parse run.

Chunk writes the parsed content into the database as document, source, and chunk records.

Vector builds semantic search vectors for the chunked content.

FieldsOrSettings

Document Format identifies the incoming source format and should match the uploaded file type.

Audience identifies who the program reference is intended for.

Display Name is the main user-facing name for the program and should be short, specific, and searchable.

Business Domain classifies the content area such as IT operations, accounting, administration, maintenance, leasing, compliance, or reporting.

Document Description is one of the most important fields on the screen.

Document Description should clearly explain what the program covers, what subsystem it supports, and what kinds of questions the Chat Agent should be able to answer from it.

Program Type identifies the language or source family such as PHP, Python, JavaScript, SQL, HTML, CSS, or generic source.

Program Unit Name should identify the main routine, module, include file, script name, or primary program unit when known.

Program Name should identify the overall program or screen name when known.

Example description guidance: This program controls upload, parse, chunk, and vector processing for program ingest, including file conversion, staged request handling, session state, and downstream AI document creation.

A weak description makes retrieval less precise.

A strong description improves downstream document identity, chunk relevance, and AI response quality.

KeysAndScope

This screen works with uploaded source-code documents that become AI reference content.

The source upload is first stored in a temporary upload location.

The converted staged text files are written to a temporary download location for staged parse processing.

Program conversion preserves logical code structure using visible declarations, comments, routines, handlers, sections, and other breakpoints so the AI can reason over technical content.

After chunk commit, the system creates permanent document and source records and then creates chunk records tied to those identities.

The original uploaded program file is later moved into permanent document file storage so it can still be downloaded or reviewed from search results.

This screen is not intended for short one-off notes when a simpler ingest path is more appropriate.

RulesAndValidations

Only supported source-code file types are allowed.

The maximum upload size is 1.5 MB.

A file must be selected before Upload is pressed.

The upload must contain a valid temporary upload file, file name, and file size.

The upload directory must be available.

The detail pane must validate before Save can start parse processing.

Display Name is required and should always be completed carefully.

Program Type should be set correctly because it improves technical interpretation and retrieval quality.

Chunk cannot proceed unless parsed data is available.

Vectoring should be run only after chunking completes successfully.

If the process stops on a hard error, do not keep pressing later buttons.

Correct the original source file, simplify the file when appropriate, break very large source into smaller source files when needed, and then restart the load from the beginning.

DownstreamEffects

Upload creates a temporary staged ingest setup.

Save starts the parse run and may create staged API parse requests behind the scenes.

Chunk creates document, source, and chunk rows in the database.

Vector adds semantic retrieval support for those chunks.

After vectoring completes, the loaded program becomes more useful to the Chat Agent for retrieval-augmented answers about routines, logic, fields, screens, and processing flow.

Examples

Example 1: Load a PHP screen so the Chat Agent can answer questions about postback handling, session variables, pane flow, and CRUD logic.

Example 2: Load a Python worker so the Chat Agent can answer questions about execution flow, API handling, logging, and database updates.

Example 3: Load a SQL script so the Chat Agent can answer questions about table creation, joins, inserts, updates, deletes, and data structure purpose.

Example 4: Search for an older loaded program, review its stored source file, then reload a corrected version.

Troubleshooting

If the screen shows Action is required, no mode was selected before pressing Select.

If Upload failed - no file selected appears, choose a file and upload again.

If Upload failed - unsupported file type appears, convert the source document into a supported source-code format and try again.

If the file is reported as too large, split the original program into smaller source files and load them separately.

If Validation failed for Detail appears, review the detail pane and complete the required fields with better program information.

If Unable to start parse process appears, stop and review the original source structure before retrying.

If No parsed data available for chunk processing appears, parsing did not complete to a valid chunk-ready state.

If Chunk processing failed appears, do not continue to Vector.

If a Vector error appears, the chunk data exists but semantic retrieval is not yet ready.

Examples of hard errors include Upload failed - cannot move uploaded file to tempupload, Upload failed - unsupported file type, Unknown DocType, and Chunk processing failed.

When a hard error occurs, processing should be treated as stopped. Correct the source file, correct the program metadata, and start over with a fresh load.

SecurityAndAccess

This screen is controlled by security group 26.

Read access is required to open the screen.

Write access is required for upload, parse, chunk, and vector actions.

Users without sufficient rights may be able to view the screen but will not be allowed to perform update actions.

500.000 - Managing Inverted Index Search Controls

100.000 - Configure Inverted Index Parameters

Screen | 2026-05-11 00:00:00 SN_SearchConfig

100.000 Configure Inverted Index Parameters

Purpose

Use this screen to manage the configuration values that control how the manual search engine evaluates, ranks, and returns search results.

This screen is intended for search engine tuning rather than document loading or content authoring. Please do not update any parameters unless you know exactly what you are doing and have indepth knowledge of inverted index processing.

Use this screen when search relevance, snippet behavior, candidate limits, or weighting rules need to be reviewed or adjusted.

The values on this screen affect how the inverted index search logic scores matches across titles, sections, chapters, metadata, and body text.

Because these settings influence the overall search engine, small changes can produce broad downstream effects on retrieval quality.

Processing

This screen has two main paths.

The first path is Search and Select for reviewing the available configuration keys already stored in the configuration table.

The second path is Save for updating the selected configuration value after review.

The grid displays configuration keys and their current stored values.

The Search field filters the grid by ConfigKey or ConfigVal so the administrator can quickly find a setting.

Select loads one configuration row into the detail pane.

The detail pane shows the selected ConfigKey, the editable ConfigVal, the system default value, and the allowed limits for that setting.

Save validates the value and then either updates the existing configuration row or creates it if it does not yet exist.

Reset to Default applies the full default configuration set back into the configuration table for all recognized search settings.

Clear removes the currently loaded detail values from the pane without deleting any stored configuration row.

This screen is intended for controlled administrative tuning and should be used carefully.

WhereToFind

Main Menu to Search Control to Search Scoring and Config.

Images

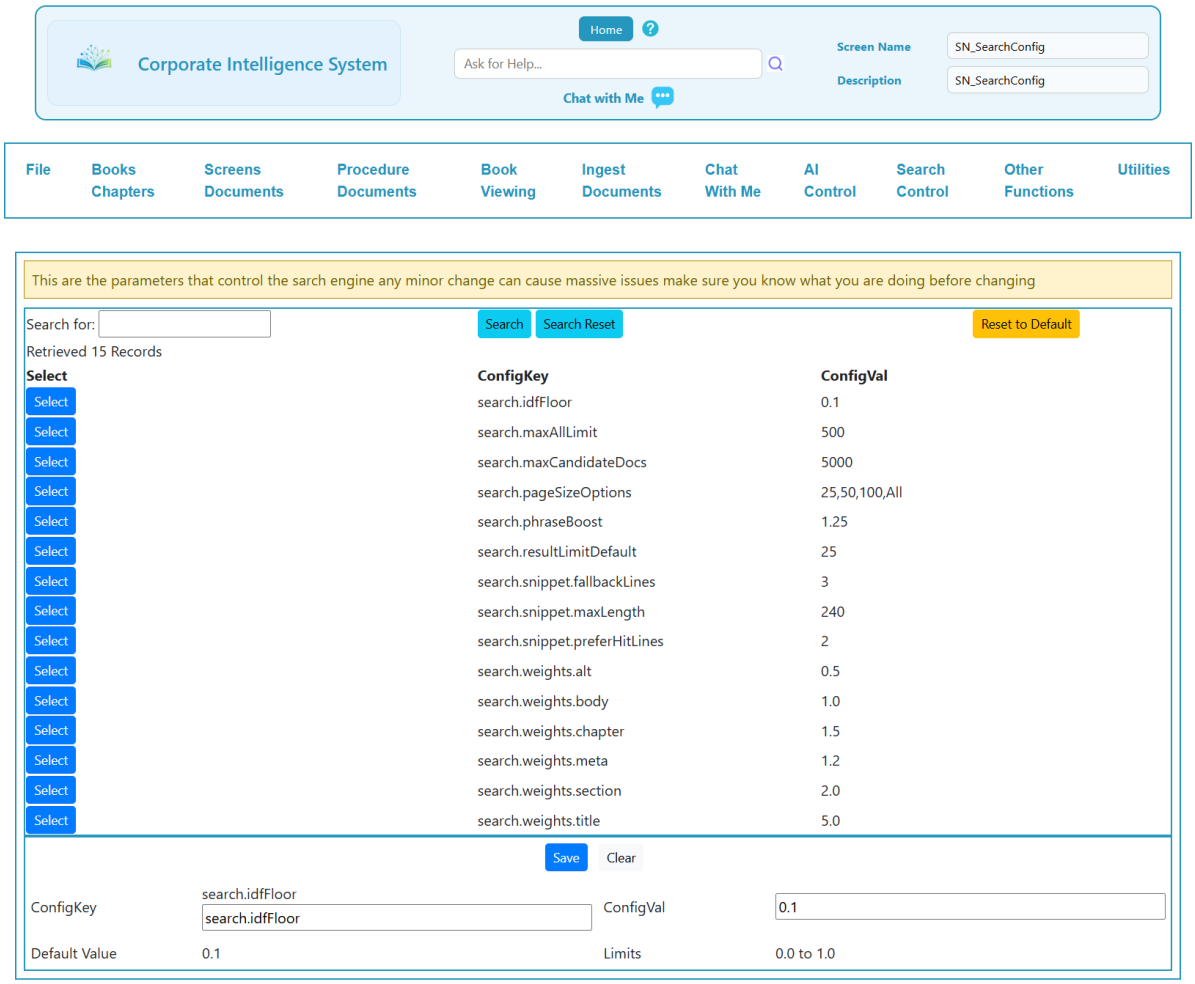


Figure: Search configuration screen for inverted index parameters.

ButtonsAndActions

Search filters the configuration grid by key or value.

Search Reset clears the search text and reloads the grid.

Select loads the chosen configuration row into the detail pane for review and update.

Save validates the selected configuration and writes the value to the configuration table.

Clear clears the detail pane fields and hides the current selection.

Reset to Default reapplies the default values for all supported search configuration keys.

FieldsOrSettings

Search for is the search box used to locate configuration rows by key name or stored value.

ConfigKey identifies the exact search parameter being controlled.

ConfigKey is selected from the grid and is not intended to be freely edited in the detail pane.

ConfigVal is the current stored value for the selected configuration key.

Default Value shows the standard fallback value defined by the program for the selected key.

Limits shows the allowed minimum and maximum range for the selected key when bounds are defined.

Recognized configuration keys include values such as search.maxAllLimit, search.maxCandidateDocs, search.weights.title, search.weights.section, search.weights.chapter, search.weights.meta, search.weights.body, search.weights.alt, search.idfFloor, search.phraseBoost, search.snippet.preferHitLines, search.snippet.fallbackLines, and search.snippet.maxLength.

Weight settings control how strongly different content areas contribute to ranking.

Snippet settings control how many lines and how much text are shown in search result previews.

Candidate and limit settings control how many possible matches are considered during retrieval.

KeysAndScope

This screen works with Search_Config_Table.

The primary key for this screen is ConfigKey.

Each row stores one named search engine parameter and its value.

The screen is scoped to recognized search configuration items used by the inverted index logic.

This screen does not manage stop words, synonyms, bypass tokens, statistics, or reindex queue actions.

RulesAndValidations

ConfigKey is required.

ConfigVal is required.

If a configuration key has defined numeric limits, ConfigVal must be numeric.

If the selected configuration key is bounded, ConfigVal must fall within the allowed minimum and maximum range.

If the selected configuration key is defined as an integer range, ConfigVal must be a whole number.

Only authorized users should change these settings.

Because the screen affects search behavior globally, values should not be changed casually.

DownstreamEffects

Changes made on this screen affect how manual search results are ranked and displayed.

Updating a weight value can increase or decrease the influence of titles, sections, chapters, metadata, alternate text, or body content during scoring.

Updating candidate or result limits can change how many records are evaluated or returned.

Updating snippet controls can change how search result previews are built and displayed to the user.

Resetting to defaults can restore the full supported search tuning set to its baseline values.

These changes can materially alter result ordering, relevance perception, and search performance.

Examples

Example 1: Increase search.weights.title when document titles should influence ranking more heavily.

Example 2: Reduce search.maxAllLimit when too many results are being returned to the user.

Example 3: Increase search.snippet.maxLength when result previews are too short to be useful.

Example 4: Use Reset to Default after testing changes that degraded result quality.

Troubleshooting

If the detail pane does not open after a grid row is chosen, confirm that Select was pressed for the intended row.

If ConfigKey is required appears, the selected configuration identity was not loaded correctly into the detail pane.

If ConfigVal is required appears, enter a value before saving.

If ConfigVal for a key must be numeric appears, enter a numeric value only.

If ConfigVal for a key must be between minimum and maximum appears, revise the entry so it falls within the allowed limits shown on the screen.

If ConfigVal for a key must be an integer appears, remove decimals and enter a whole number.

If search results behave unexpectedly after a change, review the prior value, compare against Default Value, and restore the safer setting if needed.

If multiple search behaviors became worse after tuning, use Reset to Default to restore the recognized baseline configuration set.

SecurityAndAccess

This screen is controlled by program security and administrative access rules.

Read access is required to open the screen.

Administrative update access is required to search, select, save, clear, and reset configuration values.

Users without proper rights should not modify search engine parameters because the effects apply across the full manual search process.

200.000 - Manage Stop Words

Screen | 2026-05-11 00:00:00 SN_SearchStopwords

200.000 Manage Stop Words

Purpose

Use this screen to maintain the stop word list used by the manual search engine.

Stop words are very common words that usually add little search value and are often ignored during indexing, matching, or ranking.

Examples may include words such as the, and, of, for, or other high-frequency filler terms depending on language and search design.

This screen allows administrators to activate, deactivate, add, review, and remove stop word entries.

Use this screen when search quality, indexing noise, token volume, or retrieval relevance needs improvement through better stop word control.

Processing

This screen has two main paths.

The first path is Search and Select for reviewing existing stop word records.

The second path is Add New for creating a new stop word entry.

The Search field filters the grid by token text.

Select loads one stop word row into the detail pane.

The detail pane allows update of IsActive and Source values while showing the selected token and language.

Save creates a new stop word or updates an existing one based on the Token and Language key.

Delete removes the selected stop word entry.

Clear closes the detail pane and clears the current selection.

The grid supports paging with First, Prev, Next, and Last navigation buttons when multiple pages exist.

WhereToFind

Main Menu to Search Control to Search Stop Words.

Images

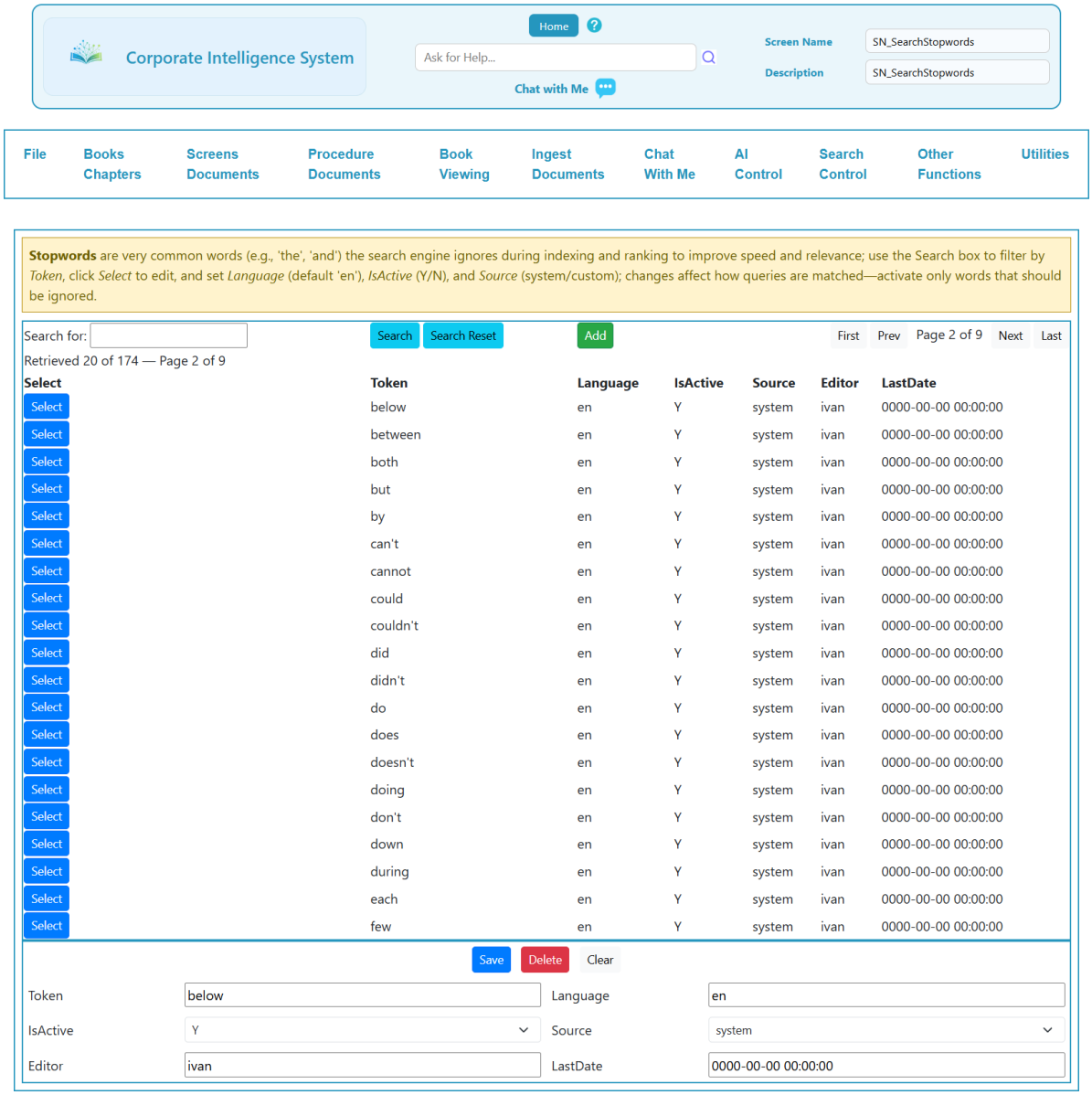


Figure: Stop word maintenance screen.

ButtonsAndActions

Search filters the stop word grid by token.

Search Reset clears the search text and reloads the full grid.

Add opens the detail pane for a new stop word entry.

Select loads the chosen stop word row into the detail pane.

Save creates or updates the selected stop word record.

Delete removes the selected stop word record.

Clear clears the detail pane fields.

First moves to the first page of grid results.

Prev moves to the prior page of grid results.

Next moves to the next page of grid results.

Last moves to the final page of grid results.

FieldsOrSettings

Search for is the filter box used to locate stop words by token text.

Token is the stop word text being controlled.

Token must be a single word with no spaces.

Language identifies the language code for the token.

The default language on this screen is en.

IsActive controls whether the token is currently active as a stop word.

Y means the token is active.

N means the token is inactive.

Source identifies how the row was created.

Typical values are system or custom.

Editor stores the user who last maintained the row.

LastDate stores the last update timestamp.

KeysAndScope

This screen works with Search_Stopword_Table.

The primary logical key is Token plus Language.

The same token may exist under multiple languages.

This screen controls ignored or reduced-value tokens used by the search engine.

This screen does not manage synonyms, bypass terms, scoring parameters, query logs, or reindex operations.

RulesAndValidations

Token is required.

Language is required.

IsActive is required and must be Y or N.

Source is required and must be system or custom.

Token must be a single word and may not contain spaces.

Token length is limited.

Language length is limited.

Editor length is limited.

LastDate must follow date and time format standards when stored.

Only authorized users should maintain stop word content.

DownstreamEffects

Adding an active stop word can reduce the influence of that token during indexing or searching.

Removing or deactivating a stop word can cause the token to participate again in matching and ranking.

Too many stop words may suppress useful search intent.

Too few stop words may increase noise and reduce result quality.

Changes may affect indexing efficiency, token counts, and relevance scoring.

Examples

Example 1: Add a common filler word that appears in nearly every document and adds no retrieval value.

Example 2: Deactivate a token that was incorrectly suppressing an important business term.

Example 3: Add a custom stop word used only within one language environment.

Example 4: Search for a token, review the row, and delete it if no longer needed.

Troubleshooting

If Token is required appears, enter a token before saving.

If Token must be a single word appears, remove spaces and retry.

If Language is required appears, confirm a language value exists.

If IsActive must be Y or N appears, choose a valid status.

If Source must be system or custom appears, choose one of the allowed values.

If a row cannot be found after Select, refresh the search grid and retry.

If paging buttons do not move results, confirm more than one page of records exists.

If search relevance changes unexpectedly after edits, review recent stop word additions or removals.

SecurityAndAccess

This screen is controlled by program security and administrative access rules.

Read access is required to open the screen.

Administrative update access is required to add, save, delete, and maintain stop word entries.

Users without proper rights should not modify stop word behavior because it can affect the entire search engine.

300.000 - Manage Synonyms

Screen | 2026-05-11 00:00:00 SN_SearchSynonyms

300.000 Manage Synonyms

Purpose

Use this screen to maintain synonym groups for the manual search engine.

Synonyms allow different words with similar meaning to be treated as related during search.

This improves retrieval when users search with alternate vocabulary.

Each synonym group is identified by a SynGroupID number.

All tokens assigned to the same SynGroupID are treated as equivalent search terms.

This is a group-based synonym model, not a main-word model.

Processing

Each row stores one token assigned to one SynGroupID.

When the search engine sees a token, it can locate that token's SynGroupID and expand the query to the other tokens in the same group.

If pay, payment, paid, and remit are all in Group 10, a search for any one of those words may also consider the others.

The Search field filters the synonym grid by token text.

Select loads a synonym row into the detail pane.

Add opens a new detail pane for creating a synonym row.

If a group is already selected, Add may reuse that SynGroupID so more tokens can be added to the same family.

If no group is selected, the next available SynGroupID may be assigned for a new family.

Save adds a new synonym row after validation.

Delete removes the selected synonym row.

Existing rows are normally maintained by delete and re-add rather than direct editing.

WhereToFind

Main Menu to Search Control to Search Synonyms.

Images

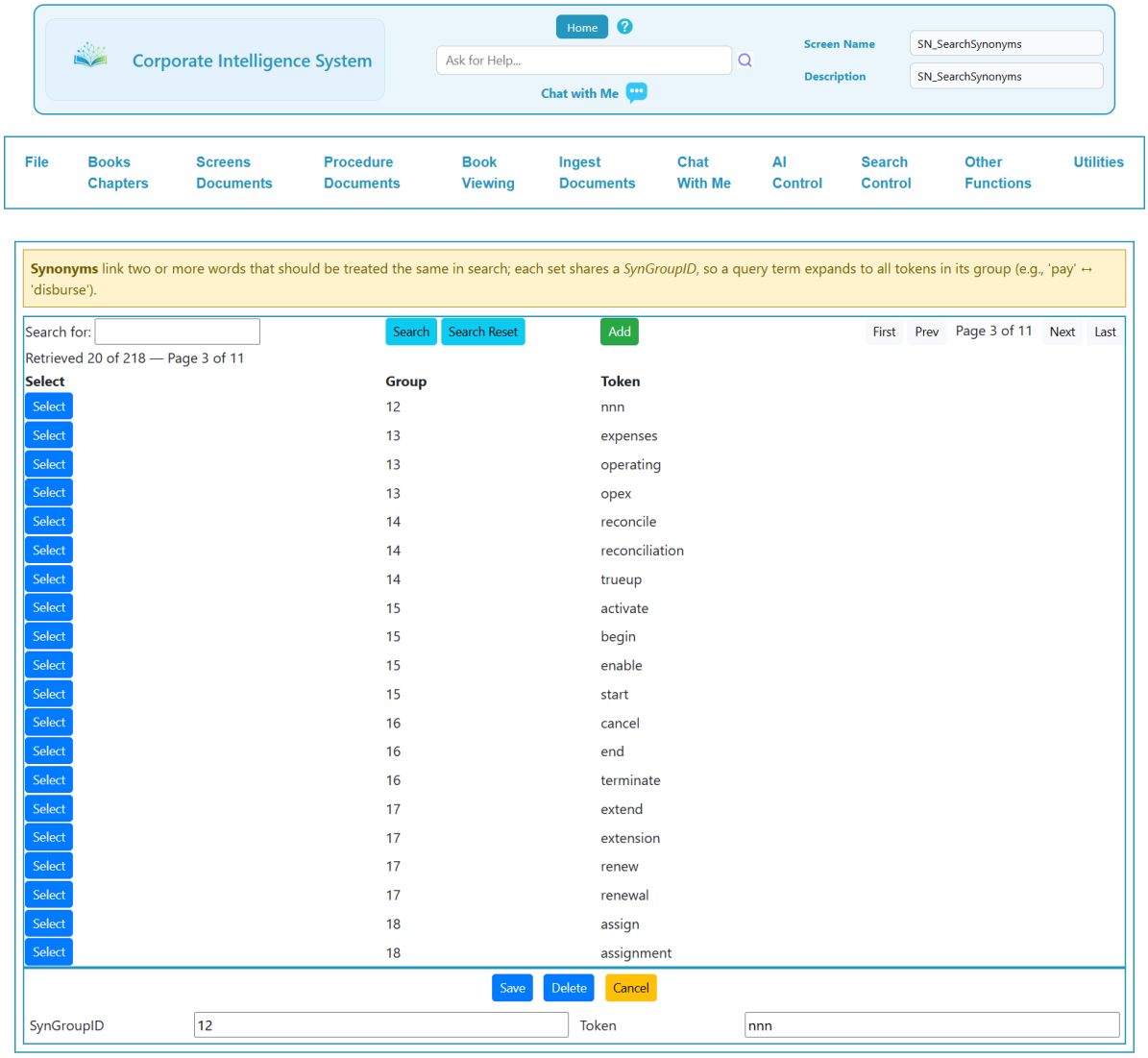


Figure: Synonym maintenance screen.

ButtonsAndActions

Search filters the grid by token text.

Search Reset clears the filter and reloads all rows.

Add opens the detail pane for a new synonym entry.

Select loads the chosen synonym row.

Save creates a new synonym row when validation passes.

Delete removes the selected synonym row.

Cancel closes the detail pane without saving.

First moves to the first page of results.

Prev moves to the prior page.

Next moves to the next page.

Last moves to the final page.

HowToUse

To create a new synonym family, press Add when no group is selected, enter the Token, and save.

To add more words to an existing family, first select a row from that group, then press Add, enter the next Token, and save.

To remove one word from a family, select that row and press Delete.

To review a family, search for one token in that group and inspect rows sharing the same SynGroupID.

To change a token spelling or wording, delete the old row and add the corrected token.

FieldsOrSettings

Search for is the filter box used to locate tokens.

SynGroupID is the synonym family number.

All rows with the same SynGroupID belong to the same related word set.

Token is the searchable word assigned to the family.

KeysAndScope

This screen works with Search_Synonym_Table.

The logical key is SynGroupID plus Token.

The same token should not be duplicated inside the same group.

This screen manages synonym expansion only.

This screen does not manage stop words, bypass words, query logs, statistics, or scoring values.

RulesAndValidations

SynGroupID is required.

SynGroupID must be numeric.

Token is required.

Token length is limited.

Token should be a single searchable word unless future standards allow phrases.

Duplicate SynGroupID plus Token combinations are blocked.

If a new group is being created, the next available group number may be required.

DownstreamEffects

Well-designed synonym groups improve recall by matching alternate user vocabulary.

Poorly designed groups may broaden searches too much and reduce precision.

Adding unrelated words to one group can create weak or misleading results.

Changes affect query expansion and candidate search matches.

Examples

Example 1: Group 10 contains pay, payment, paid, remit.

If a user searches pay, the engine may also search payment, paid, and remit.

If a user searches remit, the engine may also search pay, payment, and paid.

Example 2: Group 20 contains tenant, renter, lessee.

Example 3: Group 30 contains owner, landlord.

Example 4: Group 40 contains delete, remove, erase.

Troubleshooting

If SynGroupID is required appears, enter or select a valid group.

If Token is required appears, enter a token before saving.

If duplicate synonym already exists appears, choose another token or group.

If edits are disabled, delete the old row and add the corrected row.

If paging buttons do not move results, confirm more than one page exists.

If search results become too broad, review recently added synonym families.

SecurityAndAccess

This screen is controlled by program security and administrative access rules.

Read access is required to open the screen.

Administrative update access is required to add or delete synonym rows.

Because synonym changes affect global search behavior, only authorized users should maintain this screen.

400.000 - Manage Bypass Words

Screen | 2026-05-11 00:00:00 SN_SearchBypass

400.000 Manage Bypass Words

Purpose

Use this screen to maintain bypass tokens for the manual search engine.

Bypass tokens are words, symbols, or low-value terms that should be ignored, stripped, or handled specially during search processing.

These entries help clean user queries before scoring and matching begins.

This screen uses the Search_Token_Table and marks selected tokens with the IsBypass flag.

Use this screen when certain tokens create noisy or poor-quality search behavior.

Processing

The Search field filters the token grid by Token value.

Select loads a token row into the detail pane.

Add opens a new detail pane to create a token record.

Save creates a new token row with IsBypass and IsStopword settings.

Delete removes the selected token row.

Existing tokens are not edited directly. If changes are needed, delete the row and add a corrected row.

Paging buttons move through multiple pages of token results.

The screen also shows DocFreq, which is the stored document frequency count for the token.

DocFreq is informational and read only.

WhereToFind

Main Menu to Search Control to Search Bypass Terms.

Images

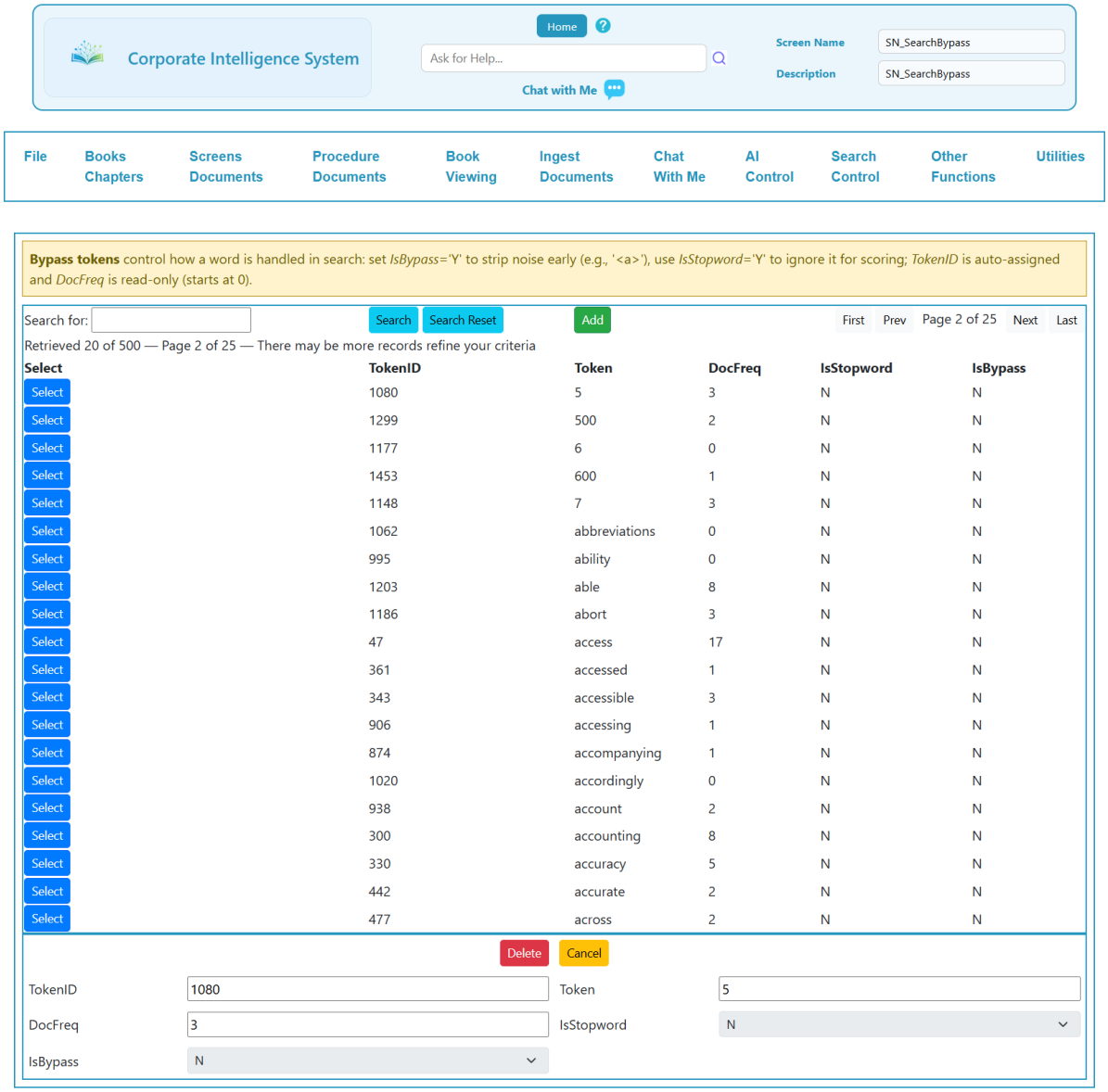


Figure: Bypass token maintenance screen.

ButtonsAndActions

Search filters the grid by token text.

Search Reset clears the search filter and reloads all rows.

Add opens a new detail row for entry.

Select loads the chosen token row.

Save creates a new token record.

Delete removes the selected token record.

Cancel closes the detail pane without saving.

First moves to the first page of results.

Prev moves to the prior page.

Next moves to the next page.

Last moves to the final page.

HowToUse

To add a bypass token, press Add, enter the Token, set IsBypass to Y, and save.

To create a stop word only, set IsStopword to Y and IsBypass to N.

To create a token that is both bypassed and treated as a stop word, set both fields to Y.

To remove a token from the list, select the row and press Delete.

To change a token, delete the old row and add the corrected row.

Use Search to quickly locate an existing token before adding duplicates.

FieldsOrSettings

Search for is the filter box used to locate tokens.

TokenID is the numeric system identifier for the token.

TokenID is assigned by the system.

Token is the searchable word or symbol entry.

DocFreq is the stored number of indexed records containing that token.

IsStopword controls whether the token is ignored for scoring as a stop word.

IsBypass controls whether the token should be stripped or bypassed during query processing.

Y means active.

N means inactive.

KeysAndScope

This screen works with Search_Token_Table.

The primary key is TokenID.

Token is also treated as unique within the table.

This screen manages bypass and stop-word style token behavior.

This screen does not manage synonyms, scoring parameters, query logs, or index rebuild operations.

RulesAndValidations

TokenID must be numeric when supplied.

Token is required.

Token must not contain spaces.

Token length is limited.

Duplicate Token values are blocked.

IsStopword must be Y or N.

IsBypass must be Y or N.

Existing rows are maintained by delete and re-add.

DownstreamEffects

Bypass tokens can be removed from search input before retrieval logic runs.

This can reduce noise from symbols or meaningless terms.

Improper bypass settings may remove useful user intent words.

Stopword settings can reduce scoring weight for common tokens.

Changes affect query cleanup, token handling, and overall search relevance.

Examples

Example 1: Token and with IsStopword=Y and IsBypass=N reduces influence of a common connector word.

Example 2: Token a with IsBypass=Y removes a low-value one-letter token from search processing.

Example 3: Token the with IsStopword=Y and IsBypass=Y may be fully ignored during search.

Example 4: Token amp with IsBypass=Y can remove noisy symbol text converted from imported documents.

Example 5: If users search owner payment and token payment is bypassed by mistake, relevant results may be lost.

Troubleshooting

If Token is required appears, enter a token before saving.

If Token must not contain spaces appears, enter one token only.

If duplicate token already exists appears, search for the token first and review the existing row.

If paging buttons do not move results, confirm more than one page exists.

If search quality worsens, review recently added bypass tokens.

If too many results disappear, useful words may have been incorrectly bypassed.

SecurityAndAccess

This screen is controlled by program security and administrative access rules.

Read access is required to open the screen.

Administrative update access is required to add or delete token rows.

Because token controls affect the global search engine, only authorized users should maintain this screen.

500.000 - View Query Log

Screen | 2026-05-11 00:00:00 SN_SearchQueryLog

500.000 View Query Log

Purpose

Use this screen to review searches performed by users in the manual search system.

The Query Log stores what users searched for, when they searched, how many results were returned, and the response speed.

This screen is primarily used for analytics, troubleshooting, and improving search quality.

Administrators can identify common search phrases, weak searches, and performance trends.

Processing

The screen reads records from Search_QueryLog_Table.

Search fields allow filtering by date or by text.

One date searches a single day.

Two dates search an inclusive date range.

One text term searches matching query text.

Two text terms search using OR logic.

Mixed date and text input is not allowed in the two boxes at the same time.

Results display newest entries first.

Paging buttons move through multiple pages of results.

Reset Log deletes all stored query log rows.

WhereToFind

Main Menu to Search Control to Search Query Log.

Images

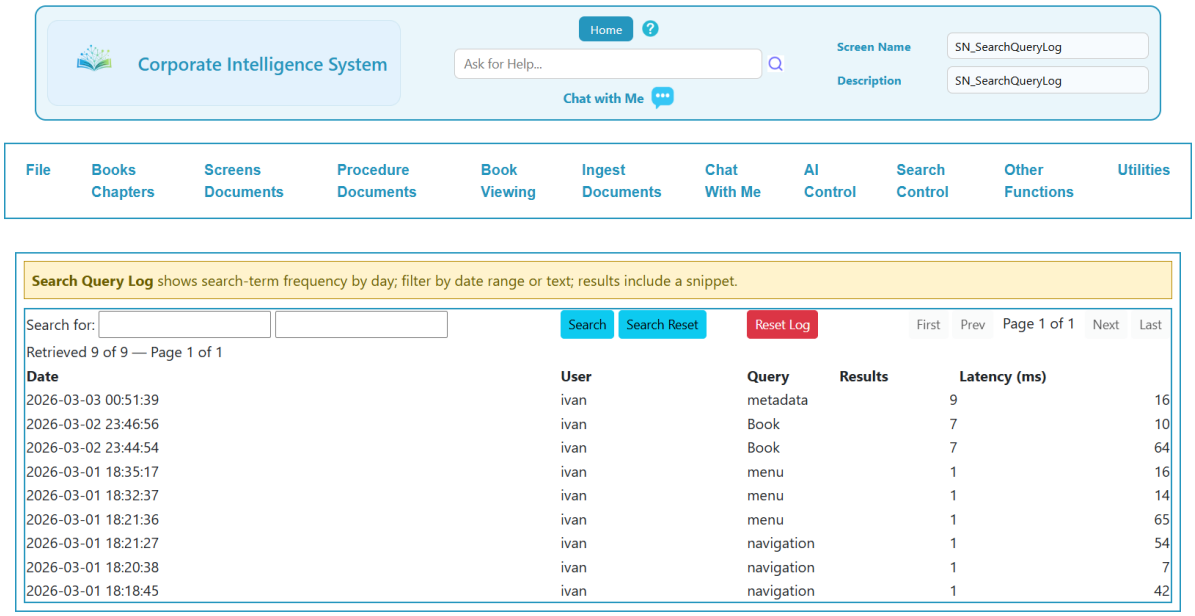


Figure: Query log review screen.

ButtonsAndActions

Search applies the entered filters.

Search Reset clears filters and reloads records.

Reset Log deletes all query log rows.

First moves to the first page.

Prev moves to the prior page.

Next moves to the next page.

Last moves to the final page.

HowToUse

To review today's searches, enter today's date and press Search.

To review a date range, enter the starting date in the first box and ending date in the second box, then press Search.

To review searches for payment topics, enter payment and press Search.

To review searches for two topics, enter rent in the first box and deposit in the second box, then press Search.

To clear all history after testing, press Reset Log.

Use Search Reset to clear filters without deleting data.

FieldsOrSettings

Search for box 1 accepts a date or text term.

Search for box 2 accepts a second date or text term.

Date is the timestamp of the search request.

User is the user ID that performed the search.

Query is the text entered by the user.

Results is the number of results returned.

Latency (ms) is the approximate search speed in milliseconds.

KeysAndScope

This screen works with Search_QueryLog_Table.

Each row normally represents one executed search.

This screen is inquiry and maintenance oriented.

This screen does not manage stop words, synonyms, scoring settings, or index rebuild logic.

RulesAndValidations

Enter either dates or text terms in the two search boxes.

Do not mix date in one box and text in the other.

Date ranges are inclusive.

Two text terms use OR matching.

Empty search boxes show newest records.

Reset Log permanently removes log history.

DownstreamEffects

Reviewing logs helps identify searches returning zero results.

Frequently repeated searches may indicate important user needs.

High latency values may indicate performance problems.

Query logs can guide future synonym, stop-word, and ranking improvements.

Resetting the log removes historical analytics data.

Examples

Example 1: Enter 04/15/2026 to view all searches performed on that day.

Example 2: Enter 04/01/2026 and 04/15/2026 to review a two-week search period.

Example 3: Enter lease to view searches containing lease.

Example 4: Enter tenant in box 1 and owner in box 2 to view searches containing tenant OR owner.

Example 5: If Query shows owner payment and Results shows 0, that phrase may need synonym or indexing review.

Troubleshooting

If no rows appear, verify filters are not too restrictive.

If mixed date and text causes an error, clear one style and search again.

If paging buttons do not move, there may be only one page.

If response times are high, review index health and server load.

If history is missing, Reset Log may have been used.

SecurityAndAccess

This screen is controlled by program security and administrative access rules.

Read access is required to view logs.

Administrative update access is required to reset the log.

Because logs may contain user activity history, access should be limited to authorized users.

600.000 - View Search Statistics

Screen | 2026-05-11 00:00:00 SN_SearchStats

600.000 View Search Statistics

Purpose

Use this screen to review the health, size, and operating statistics of the manual search index.

This screen provides a read-only dashboard showing document counts, token counts, postings, top tokens, largest indexed documents, and maintenance summaries.

It is designed for administrators who need to monitor index growth, performance, and search quality trends.

No records are edited from this screen.

Processing

When the screen opens, it automatically runs background statistics routines.

The program calls reporting logic and vacuum or hygiene logic, then displays the returned results.

No Search button is required.

The screen is informational and refresh-based.

Totals display high-level index counts.

Top Tokens display the most common indexed words.

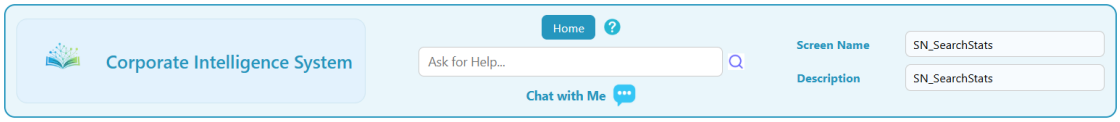
Largest Documents display the biggest indexed sources by token count.

Vacuum Summary displays maintenance or cleanup statistics.

WhereToFind

Main Menu to Search Control to Index Stats and Health.

Images



[2026-04-16T13:12:26+00:00] reportStats: docs=26 tokens=1556 postings=5571
[2026-04-16T13:12:26+00:00] Action 'reportStats' completed in 10 ms.
[2026-04-16T13:12:32+00:00] vacuumStats: updated DocFreq for 1556 tokens.
[2026-04-16T13:12:32+00:00] Action 'vacuumStats' completed in 6199 ms.

File | Books Chapters | Screens Documents | Procedure Documents | Book Viewing | Ingest Documents | Chat With Me | AI Control | Search Control | Other Functions | Utilities

Search Index Statistics (read-only)

Totals

Documents	26	Tokens	1,556
Postings	5,571	Last Indexed	2026-04-15 20:34:03
Report Runtime (ms)	10		

Top Tokens

Token	Doc Freq
document	26
manual	26
operating	26
purpose	25
screen	25
000	23
books	22
examples	21
images	21
menu	21
select	21
system	21
documents	20
may	20
name	20
selected	20
troubleshooting	20
wheretofind	20
will	20
book	19

Largest Documents

Type	Name	Title	Token Count
SCR	SN_IngestLetter	Load Letters Memos	1,739
SCR	SN_IngestXLSX	Loading XLXS for Chat Agent	1,731
SCR	SN_IngestEmail	Load Emails for AI Chat Agent	1,704
SCR	SN_IngestPDFDOCXRTF	Load Documents Books Manuals	1,692
SCR	SN_IngestProgram	Load Programs for AI Chat Agent	1,602
SCR	SN_IngestKnowNote	Load Notes for AI Chat	1,564
SCR	SN_Screen	Screens and Documents	1,522
SCR	SN_Procedures	Manage Procedures and Groups	1,441
PROC	A Overview of Books Chapters and Pages	Overveiw of Managing Books Chapters Documents and	1,017
SCR	IntroSystem	System Introduction	850
SCR	IntroKeys	Understanding Index and AI Search Keys	721
PROC	Create Screen Documents	How to Create Screens and Documents	534
SCR	BookIntro	Intro to Books Chapters Procedures and Screens Doc	475
SCR	Search	Search Screen	435
PROC	Creating Procedures	How to Create Procedures	407
SCR	SN_Chapter	Manage Chapter Titles	368
PROC	Creating Chapters	How to Create Manage Chapters	358
SCR	SN_Book	Manage Book Titles	321
PROC	Creating Book Titles	How to Create and Manage Books	308
SCR	Menu_Main	Main Menu	265

Vacuum Summary

Tokens Affected	1,556	Runtime (ms)	6,199

Figure: Search statistics dashboard.

ButtonsAndActions

This screen is read only and normally has no maintenance buttons.

Use browser refresh or reopen the screen to reload statistics.

HowToUse

Open the screen and review the Totals section first.

Review Documents, Tokens, and Postings to understand index size.

Review Last Indexed to confirm recent indexing activity.

Review Top Tokens to identify noisy or overly common words.

Review Largest Documents to identify unusually large sources.

Review Vacuum Summary to confirm maintenance activity completed successfully.

FieldsOrSettings

Documents is the number of indexed source records.

Tokens is the number of searchable tokens stored in the index.

Postings is the number of token-to-document match rows.

Last Indexed is the most recent index update date and time.

Report Runtime (ms) is the time required to generate statistics.

Top Tokens lists common indexed words with document frequency.

Largest Documents lists indexed records with highest token counts.

Vacuum Tokens Affected shows rows touched by cleanup logic.

Vacuum Runtime (ms) shows maintenance elapsed time.

KeysAndScope

This screen summarizes search index tables and maintenance routines.

It may read from token, posting, queue, and document index structures.

This screen does not directly manage stop words, synonyms, query logs, or rebuild options.

RulesAndValidations

This screen is read only.

Counts depend on current database content.

Large systems may require more time to generate statistics.

If maintenance routines fail, warning messages may appear instead of data.

DownstreamEffects

No data is changed by simply viewing this screen.

However, the information shown can guide cleanup and tuning decisions.

Very high token counts may indicate missing stop words.

Very large documents may indicate files that should be split or cleaned.

Stale Last Indexed dates may indicate indexing delays.

Examples

Example 1: Documents = 5,000 confirms five thousand sources are indexed.

Example 2: Tokens = 900,000 with many noisy Top Tokens may suggest better stop-word tuning is needed.

Example 3: Largest Documents shows one source with 250,000 tokens, indicating a document that may need segmentation.

Example 4: Last Indexed shows three weeks ago, suggesting the index queue may not be processing.

Example 5: Vacuum Runtime = 120 ms and Tokens Affected = 0 may indicate no cleanup was needed.

Troubleshooting

If all counts show zero, confirm the index has been built.

If Last Indexed is blank, indexing may never have run.

If Top Tokens contains many meaningless words, review stop words and bypass settings.

If Largest Documents contains unexpected records, inspect source ingestion quality.

If the page loads slowly, statistics generation may be processing a large index.

If error messages appear, review included index routines and database connectivity.

SecurityAndAccess

This screen is controlled by program security and administrative access rules.

Read access is required to view statistics.

Because statistics reveal system internals, access should be limited to authorized users.

700.000 - Manage Inverted Index Options

Screen | 2026-05-11 00:00:00 SN_SearchIndex

700.000 Manage Inverted Index Options

Purpose

Use this screen to run administrative actions for the manual search index.

This is the control center for rebuilding, queue processing, single-document reindexing, purge actions, cache flushing, and diagnostic checks.

The screen routes selected actions into the index maintenance engine.

Because these actions can change the live search index, this screen should be used only by authorized administrators.

Processing

Select an Action from the dropdown list.

Depending on the selected action, additional fields appear such as Document Type, Document Name, or Queue Max Items.

Optional flags control Include Unassigned, Smart Rebuild, and Dry Run.

Press Save to execute the selected maintenance action.

The program validates inputs, then routes the request to the indexing engine.

Messages and statistics are returned after processing.

WhereToFind

Main Menu to Search Control to Reindex and Queue.

Images

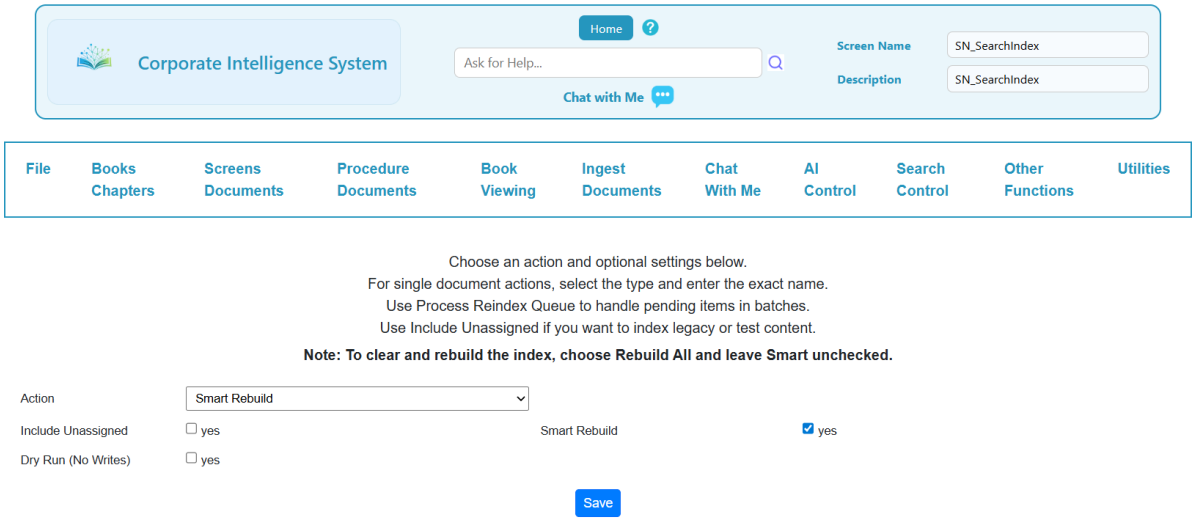


Figure: Search index maintenance control screen.

ButtonsAndActions

Save executes the selected action.

Action choices include Rebuild All, Smart Rebuild, Run Queue, Reindex Doc, Enqueue Doc, Purge Doc, Vacuum Stats, Queue Depth, Flush Caches, and Self Check.

HowToUse

Choose Rebuild All to fully recreate the index.

Choose Smart Rebuild to process only changed or out-of-date items.

Choose Run Queue to process pending queue entries in batches.

Choose Reindex Doc to rebuild one specific screen or procedure.

Choose Enqueue Doc to place one item into the queue for later processing.

Choose Purge Doc to remove one indexed item from the search engine.

Choose Queue Depth to see pending queue counts.

Choose Flush Caches to clear cached search data.

Choose Self Check to run internal diagnostics.

Use Dry Run when you want to test logic without writing changes.

FieldsOrSettings

Action is the selected maintenance task.

Document Type is SCR for Screen or PROC for Procedure.

Document Name is the exact ScreenName or ProcedureName.

Queue Max Items controls how many queue rows are processed in one run.

Include Unassigned includes legacy or unassigned content when rebuilding.

Smart Rebuild uses changed or stale detection logic rather than full rebuild logic.

Dry Run performs testing without saving writes.

KeysAndScope

This screen controls index generation routines and queue processing.

It may read from Sec_Screen_Table, Proc_Procedure_Table, queue tables, token tables, posting tables, and cache structures.

This screen does not directly maintain stop word rows, synonym rows, or query log rows.

RulesAndValidations

Action is required.

Single document actions require Document Type and exact Document Name.

Queue Max Items must be numeric and greater than zero.

Smart Rebuild is automatically enforced for certain rebuild modes.

Only authorized users should run write actions.

Rebuild All without Smart may clear and recreate index content.

DownstreamEffects

Rebuild All can recreate the full inverted index.

Smart Rebuild updates only changed records and is usually faster.

Run Queue processes pending indexing requests.

Purge Doc removes one document from search results.

Flush Caches may refresh stale search behavior.

Incorrect document names on single-item actions may return not found messages.

Examples

Example 1: Select Smart Rebuild and press Save to update only changed screens and procedures.

Example 2: Select Rebuild All, leave Smart unchecked, and press Save to recreate the entire index.

Example 3: Select Run Queue, enter 200 in Queue Max Items, and press Save to process two hundred pending rows.

Example 4: Select Reindex Doc, choose SCR, enter SN_SearchStats, and press Save to rebuild only that screen.

Example 5: Select Purge Doc, choose PROC, enter PrintChecks, and press Save to remove that procedure from the index.

Example 6: Select Flush Caches and press Save after changing stop words or scoring values.

Troubleshooting

If no action occurs, confirm Action is selected and Save was pressed.

If Screen not found appears, verify the exact ScreenName spelling.

If Procedure not found appears, verify the exact ProcedureName spelling.

If queue processing returns zero, there may be no pending items.

If rebuild runs slowly, use Smart Rebuild instead of full rebuild when possible.

If search results remain stale, run Smart Rebuild then Flush Caches.

If Dry Run was enabled, no writes will occur until it is turned off.

SecurityAndAccess

This screen is controlled by program security and administrative access rules.

Read access is required to open the screen.

Administrative update access is required to execute index maintenance actions.

Because this screen can materially change the search engine, access should be limited to trusted administrators.

600.000 - Managing Chat Agent Config

100.000 - Managing AI Stop Words

Screen | 2026-05-11 00:00:00 SN_AIWordStopAI

100.000 Managing AI Stop Words

Purpose

Use this screen to maintain AI stop words used by the chat agent, keyword engine, document parsing routines, and AI search support processes.

AI stop words are common, noisy, repetitive, or low-value words that should be ignored or reduced during keyword extraction, chunk analysis, indexing, or retrieval support logic.

This screen is different from standard search stop words because it is focused on AI ingestion and AI retrieval quality.

Use this screen when the AI system repeatedly indexes meaningless words, overweights filler text, or returns weak keywords. :contentReference[oaicite:0]{index=0}

Processing

The screen reads and maintains rows from AI_StopWord_Table.

The Search field filters by WordText or WordNorm.

An Active filter allows viewing active only, inactive only, or all rows.

Select loads one row into the detail pane.

Add opens a new detail pane with defaults such as Category GENERAL and Active Y.

Save creates a new row or updates an existing row.

If WordNorm is blank, the system automatically normalizes WordText into a lowercase cleaned value.

Delete removes the selected stop word row.

Paging buttons move through multiple result pages. :contentReference[oaicite:1]{index=1}

WhereToFind

Main Menu to AI Control to AI Stop Words.

Images

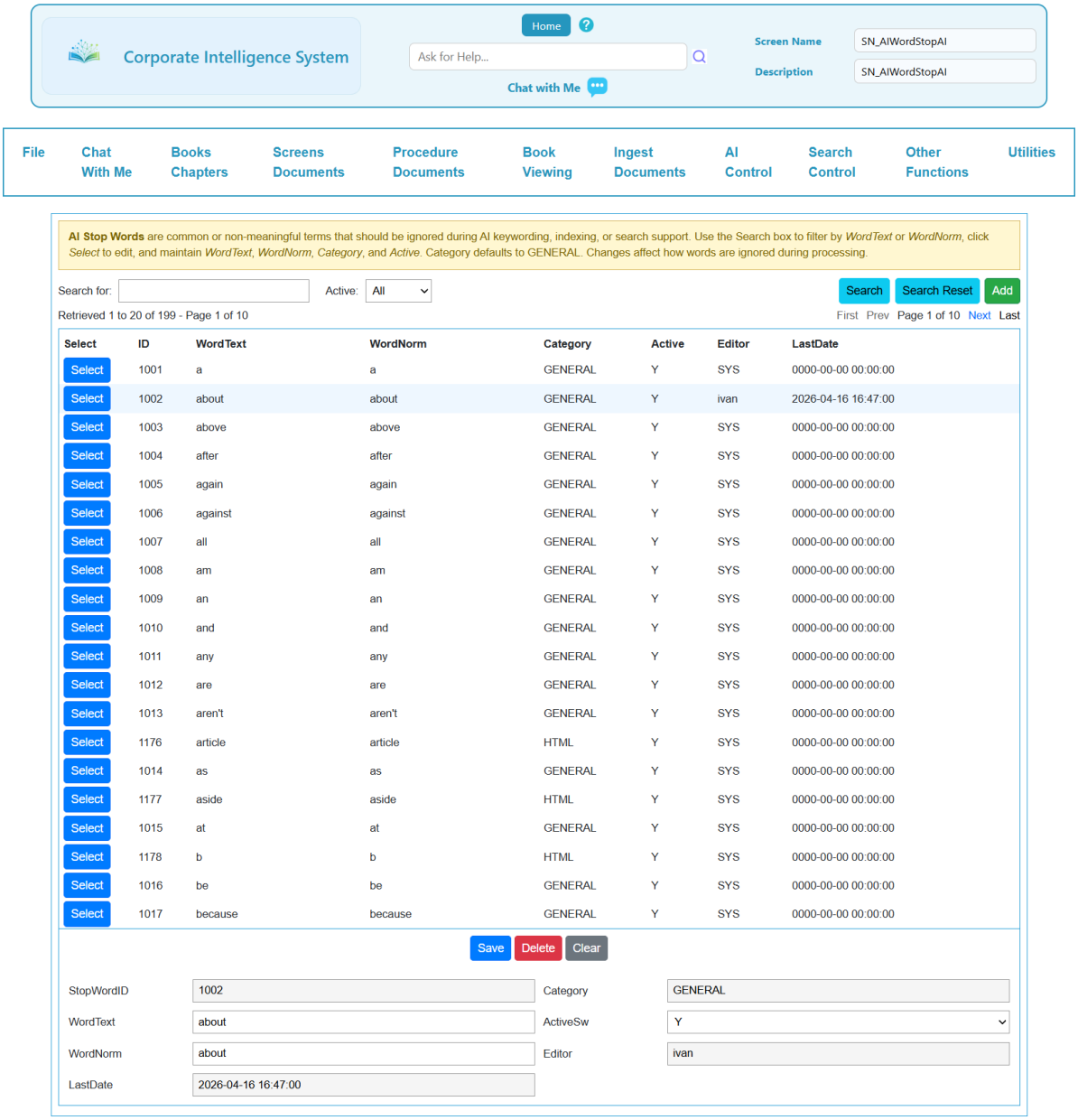


Figure: AI stop word maintenance screen.

ButtonsAndActions

Search filters rows by WordText or WordNorm.

Search Reset clears filters and reloads all rows.

Add opens a new entry screen.

Select loads the chosen stop word row.

Save creates or updates the selected row.

Delete removes the selected row.

Clear clears the detail pane.

First moves to the first page.

Prev moves to the prior page.

Next moves to the next page.

Last moves to the final page.

HowToUse

Use Add to create a new AI stop word.

Enter the WordText exactly as it commonly appears in imported content.

Leave WordNorm blank if you want the system to auto-create the normalized version.

Select the proper Category.

Set Active to Y to enable immediate use.

Press Save.

Use Search first before adding to avoid duplicates.

Use Active = N when you want to keep the row but temporarily disable it.

FieldsOrSettings

StopWordID is the numeric key assigned by the system.

WordText is the original word or phrase to suppress.

WordNorm is the normalized lowercase cleaned version used for matching.

StopWordCategory classifies the type of stop word.

Allowed categories include GENERAL, DOCID, UI, CODE, SQL, NOISE, and HTML.

ActiveSw controls whether the row is active.

Editor stores the last user who maintained the row.

LastDate stores the last update timestamp. :contentReference[oaicite:2]{index=2}

CategoryExamples

GENERAL is for common filler words such as very, really, basically.

DOCID is for imported document labels such as pageid or recordid.

UI is for screen text such as click, button, menu, panel.

CODE is for technical code noise such as function, var, endif.

SQL is for terms such as select, from, where, update.

NOISE is for junk text such as xxx, nnn, testtest.

HTML is for tags or converted markup such as div, span, nbsp.

KeysAndScope

This screen works with AI_StopWord_Table.

The primary key is StopWordID.

WordText and WordNorm are operational matching fields.

This screen affects AI keywording and AI retrieval support logic.

This screen does not manage manual search synonyms or standard search scoring.

RulesAndValidations

WordText is required.

WordNorm is required at save time, but the system may auto-build it if blank.

StopWordCategory must be one of the allowed values.

ActiveSw must be Y or N.

Search Page and Page Size must be numeric.

Only authorized users should maintain AI stop words. :contentReference[oaicite:3]{index=3}

DownstreamEffects

Good AI stop words improve keyword quality.

They reduce wasted vector content and noisy chunks.

They improve relevance when selecting chunks for AI answers.

Too many stop words may suppress meaningful business language.

Poorly chosen stop words may weaken retrieval accuracy.

Examples

Example 1: Add click under UI category so imported help screens do not overuse button language.

Example 2: Add select under SQL category if SQL manuals are polluting keyword results.

Example 3: Add nbsp under HTML category after imported web pages create markup noise.

Example 4: Add pageid under DOCID category to suppress converted PDF metadata labels.

Example 5: If imported code files overuse function and variable, add them under CODE category.

Troubleshooting

If Save fails, confirm WordText is entered.

If Category invalid appears, choose one of the allowed categories.

If duplicate-like rows exist, search WordText and WordNorm before adding more rows.

If AI still returns noisy keywords, add the repeated junk terms and rebuild related indexes if required.

If too many useful terms disappear, deactivate recent stop words and retest.

If paging buttons do not move, only one page of rows may exist.

SecurityAndAccess

This screen is controlled by program security group access.

Read access is required to open the screen.

Write access is required to add, save, or delete rows.

Because this screen affects AI behavior globally, access should be limited to trusted administrators. :contentReference[oaicite:4]{index=4}

200.000 - Manage AI Synonyms

Screen | 2026-05-11 00:00:00 `SN_AIWordSynonymsAI`

200.000 Manage AI Synonyms

Purpose

Use this screen to manage word relationships used by the AI search engine, keyword expansion engine, chunk retrieval process, and user question interpretation logic.

This screen is one of the most important quality-control screens for the Chat AI Agent because it helps determine which document chunks, screen help records, manual sections, procedures, and uploaded-document text should be selected and sent to the API for answer generation.

Customers do not always use the same words that appear in manuals, procedures, screens, policies, or uploaded documents.

One customer may ask about human resources, another may ask about HR, another may ask about employees, and another may ask about staff.

If the system only searches exact wording, strong matching content may be missed even when the correct answer exists in the database.

This screen solves that problem by connecting one term to alternate words, abbreviations, misspellings, phrases, and related forms.

The Chat AI Agent can use these synonym rows before the final API request so the selected evidence is stronger, more complete, and closer to the user's real intent.

Good synonym maintenance improves recall, ranking, business vocabulary recognition, source selection, and final answer quality without changing the AI model itself.

The retrieval process can consider exact keywords, phonetic keywords, exact synonyms, phonetic synonyms, LIKE text matches, source metadata such as Topic or Human Resources, and vector proximity.

Because all of those signals can affect which chunks are selected, synonyms are not just a convenience list; they are part of the ranking and evidence-selection control system.

Examples:

tenant = renter

owner = landlord

check = cheque

payroll = wages

work order = maintenance request

AP = accounts payable

HR = Human Resources

employee = staff

HowTheCorrelationWorks

Each row links one main term to one alternate term.

A full synonym family is built using multiple rows that share the same SynGroupID.

Think of SynGroupID as one synonym family number.

All rows with the same SynGroupID belong to the same meaning group.

Example SynGroupID 1001:

rent -> rental payment

rent -> monthly rent

rent -> lease payment

rent -> tenant payment

Because all rows share group 1001, the system knows these terms are related.

If the user searches lease payment, the AI may also consider rent.

If the user searches tenant payment, the AI may also consider rental payment.

This creates many-to-many meaning expansion using simple row storage.

For best coverage, create reverse rows where users may begin with either phrase.

Example: automotive repair -> auto repair and auto repair -> automotive repair.

WhySynonymsMatterToTheChatAIAgent

The Chat AI Agent does not answer from the entire database at once.

It first selects the best supporting chunks and then sends selected evidence to the API.

If the wrong chunks are selected, the final answer may be incomplete even when the model is working correctly.

Synonyms help the system find the right chunks when the user's wording differs from the wording stored in manuals, procedures, screen help, source metadata, or uploaded documents.

Synonyms are especially important for business systems because customers often use local vocabulary, abbreviations, old terminology, slang, job-specific wording, or short phrases.

Examples include Human Resources versus HR, maintenance request versus work order, renter versus tenant, and vendor bills versus accounts payable.

Adding synonyms lets the system bridge those wording differences before the final API call is made.

HowTheRetrievalWeightsWork

The system can rank potential chunks using several signals together.

Exact keyword matches can raise the rank when the user's words appear directly in the content.

Phonetic keyword matches can help when words sound similar or may be spelled differently.

Exact synonym matches can raise the rank when the user asks with one term and the source uses a related term.

Phonetic synonym matches can help when related terms have spelling or pronunciation variations.

LIKE text matches can find partial text matches in fields such as terms, normalized terms, synonyms, normalized synonyms, and source text.

Source metadata can also influence ranking when metadata values such as Topic, BusinessDomain, ProgramName, ScreenName, or Human Resources match the request.

Vector proximity can identify semantically similar chunks even when exact words are different.

The best retrieval result usually comes from combining these signals rather than relying on only one method.

Synonyms strengthen this combined ranking process by giving the system more controlled business

vocabulary to match against.

RecordStructure

Each row contains:

SynonymID = unique row key.

SynGroupID = family/group identifier.

DomainContext = where the synonym applies.

TermText = primary word or phrase.

TermNorm = normalized version of TermText.

SynonymText = alternate word or phrase.

SynonymNorm = normalized version of SynonymText.

AliasType = relationship type.

Strength = confidence score.

ActiveSw = Y or N.

Editor and LastDate = audit tracking.

DetailedFieldMeaning

SynGroupID ties many rows together.

DomainContext limits meaning to a business area.

Strength tells the AI how strong the match is.

AliasType tells what kind of relationship exists.

This lets the same word mean different things in different business areas.

WhyDomainContextMatters

The same word can mean different things depending on context.

Example word: lease

PROPERTY domain = rental agreement

EQUIPMENT domain = equipment financing contract

LEGAL domain = contract instrument

GENERAL domain = all-purpose meaning.

Use specific domains whenever possible for cleaner AI results.

DomainContext also helps the retrieval process because business-area wording can act as a metadata signal.

For example, Human Resources metadata can help HR-related content rank higher when the user asks an employee-policy question.

AliasTypesExplained

SYNONYM = same meaning.

ABBREV = abbreviation.

MISSPELL = common misspelling.

PHRASE = longer phrase equivalent.

MORPH = tense/plural/root variation.

StrengthExamples

1.000 = nearly exact same meaning.

0.950 = very strong relation.

0.850 = normal synonym.

0.700 = weaker but useful.

0.500 = loose related concept.

Higher values should be used carefully because they influence ranking more strongly.

RealExamplesPropertyManagement

SynGroupID 2001

tenant -> renter

tenant -> occupant

tenant -> resident

DomainContext PROPERTY

Strength 0.900

Meaning: user searches renter and tenant records still match.

SynGroupID 2002

owner -> landlord

owner -> property owner

owner -> investor owner

DomainContext PROPERTY

Meaning: manuals using owner can be found when searching landlord.

RealExamplesAccounting

SynGroupID 3001

accounts payable -> AP

accounts payable -> vendor payables

accounts payable -> bills payable

DomainContext ACCOUNTING

SynGroupID 3002

accounts receivable -> AR

accounts receivable -> customer receivables

accounts receivable -> open invoices

RealExamplesMaintenance

SynGroupID 4001

work order -> maintenance request

work order -> repair ticket

work order -> service request

DomainContext WORK_ORDERS

RealExamplesHumanResources

SynGroupID 4501

human resources -> HR

HR -> human resources

employee -> staff

staff -> employee

DomainContext HR or HUMAN_RESOURCES depending on the installed domain standard.

Meaning: user searches HR but the manual says Human Resources, or user searches staff but the manual says employee.

RealExamplesSearchQuality

SynGroupID 5001

login -> sign in

login -> log in

login -> access portal

DomainContext PORTALS

User types sign in but manual says login.

MisspellingExamples

SynGroupID 6001

maintenance -> maintnance

maintenance -> maintenence

AliasType MISSPELL

DomainContext GENERAL

User typo still finds correct data.

MorphologyExamples

SynGroupID 7001

pay -> paid

pay -> paying

pay -> payment

AliasType MORPH

Used carefully because not every derived word has identical meaning.

HowSearchUsesThisTable

User asks: How do I pay rent?

System may expand:

pay rent

make payment rent

lease payment

tenant payment

monthly rent

This can retrieve better chunks before sending them to the AI model.

The expanded terms may be combined with exact keyword ranking, phonetic keyword ranking, synonym ranking, phonetic synonym ranking, LIKE matching, source metadata weighting, and vector proximity.

HowToBuildGoodGroups

Choose one clear main concept.

Create one SynGroupID for that concept.

Add multiple rows for common alternate terms.

Add reverse rows when either term may be used as the starting search phrase.

Use the same DomainContext.

Use realistic Strength values.

Deactivate poor rows instead of deleting immediately.

SelectedGroupWorkflow

Use Group selects a SynGroupID from the grid as the active working group.

When a group is selected, the grid is filtered to that group.

Add creates the next row inside the selected group.

Add New Group creates a new SynGroupID and makes it the selected working group.

Clear Group clears the selected group and returns the screen to normal search mode.

Select loads one row for update or delete without changing the selected group unless the user explicitly chooses Use Group.

After Save or Delete, the screen remains ready to add another row while preserving the selected group when group mode is active.

BadDesignExamples

Do not mix unrelated meanings in one group.

Bad:

bank = river bank

bank = financial bank

Those need separate groups and separate domains.

Do not give weak relationships a 1.000 score.

Do not place all rows in GENERAL when specific domains exist.

ButtonsAndActions

Search filters by term, synonym, domain, and active status.

Search Reset clears filters.

Select loads a row into detail for update or delete.

Use Group selects the row's SynGroupID as the current working group.

Add starts a new synonym row.

Add New Group creates the next SynGroupID and prepares the screen for adding rows to that new group.

Save creates or updates a synonym row.

Cancel clears the current working values and returns to normal entry mode.

Delete removes the selected row.

Clear Group clears the active selected group.

First Prev Next Last move through result pages.

Sample Setup opens an example showing forward and reverse synonym rows.

OperationalTip

When users repeatedly ask the same thing using alternate wording, add synonym rows for those phrases.

When manuals use old terminology and users use new terminology, connect both terms here.

When source metadata uses a business topic such as Human Resources but users ask with abbreviations such as HR, add rows that bridge the two terms.

This screen can dramatically improve AI usefulness without changing the model.

Troubleshooting

If wrong results appear, lower Strength or deactivate the row.

If no expansion occurs, verify ActiveSw = Y.

If unrelated results appear, split mixed SynGroupID rows into separate groups.

If duplicate rows exist, consolidate them.

If search misses abbreviations, add ABBREV rows.

If phonetic matches are weak, add clearer exact synonyms with appropriate Strength values.

If the wrong domain content is selected, review DomainContext and source metadata alignment.

SecurityAndControl

Only trusted administrators should maintain synonyms.

These rows directly influence AI interpretation, chunk retrieval, source ranking, and search weighting.

Poor synonym maintenance can degrade answer quality across the system.

High-strength rows should be reviewed carefully because they can affect what supporting data is sent to the API.

Images

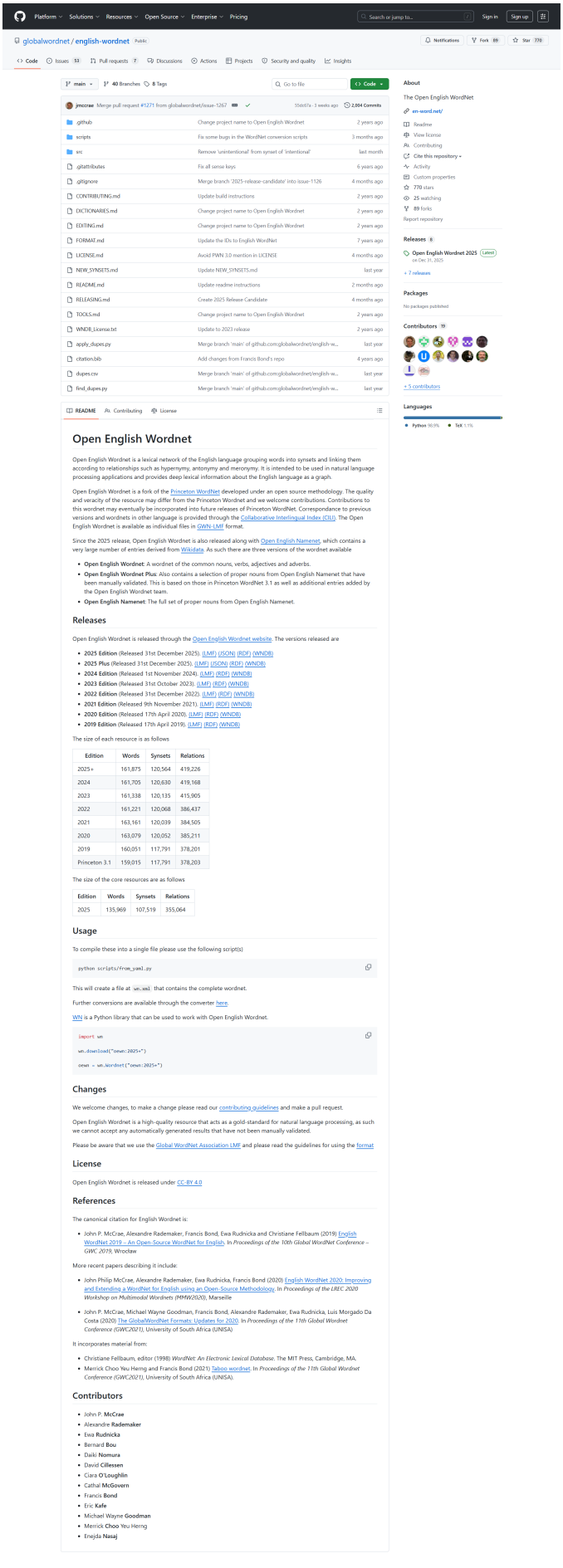

Platform
Solutions
Resources
Open Source
Enterprise
Pricing
Search or jump to...
Sign in
Sign up
globalwordnet / english-wordnet
Public
Notifications
Fork 89
Star 770
Code
Issues 53
Pull requests 7
Discussions
Actions
Projects
Security and quality
Insights
main
40 Branches
8 Tags
Go to file
Code
jmccrae Merge pull request #1271 from globalwordnet/issue-1267
356d07a · 3 weeks ago
2,004 Commits
.github Change project name to Open English Wordnet 2 years ago
scripts Fix some bugs in the WordNet conversion scripts 3 months ago
src Remove 'unintentional' from synset of 'intentional' last month
.gitattributes Fix all sense keys 6 years ago
.gitignore Merge branch '2025-release-candidate' into issue-1126 4 months ago
CONTRIBUTING.md Update build instructions 2 years ago
DICTIONARIES.md Change project name to Open English Wordnet 2 years ago
EDITING.md Change project name to Open English Wordnet 2 years ago
FORMAT.md Update the IDs to English WordNet 7 years ago
LICENSE.md Avoid PWN 3.0 mention in LICENSE 4 months ago
NEW_SYNSETS.md Update NEW_SYNSETS.md last year
README.md Update readme instructions 2 months ago
RELEASING.md Create 2025 Release Candidate 4 months ago
TOOLS.md Change project name to Open English Wordnet 2 years ago
WNDB_License.txt Update to 2023 release 2 years ago
apply_dupes.py Merge branch 'main' of github.com:globalwordnet/english-w... last year
citation.bib Add changes from Francis Bond's repo 4 years ago
dupes.csv Merge branch 'main' of github.com:globalwordnet/english-w... last year
find_dupes.py Merge branch 'main' of github.com:globalwordnet/english-w... last year
README
Contributing
License
About
The Open English WordNet
en-word.net/
Readme
View license
Contributing
Cite this repository
Activity
Custom properties
770 stars
25 watching
89 forks
Report repository
Releases 8
Open English Wordnet 2025 Latest
on Dec 31, 2025
+ 7 releases
Packages
No packages published
Contributors 19
+ 5 contributors
Languages
Python 98.9%
TeX 1.1%
Open English Wordnet
Open English Wordnet is a lexical network of the English language grouping words into synsets and linking them according to relationships such as hypernymy, antonymy and meronymy. It is intended to be used in natural language processing applications and provides deep lexical information about the English language as a graph.
Open English Wordnet is a fork of the Princeton WordNet developed under an open source methodology. The quality and veracity of the resource may differ from the Princeton Wordnet and we welcome contributions. Contributions to this wordnet may eventually be incorporated into future releases of Princeton WordNet. Correspondance to previous versions and wordnets in other language is provided through the Collaborative Interlingual Index (CILI). The Open English Wordnet is available as individual files in GWN-LMF format.
Since the 2025 release, Open English Wordnet is also released along with Open English Namenet, which contains a very large number of entries derived from Wikidata. As such there are three versions of the wordnet available
Open English Wordnet: A wordnet of the common nouns, verbs, adjectives and adverbs.
Open English Wordnet Plus: Also contains a selection of proper nouns from Open English Namenet that have been manually validated. This is based on those in Princeton WordNet 3.1 as well as additional entries added by the Open English Wordnet team.
Open English Namenet: The full set of proper nouns from Open English Namenet.
Releases
Open English Wordnet is released through the Open English Wordnet website. The versions released are
2025 Edition (Released 31st December 2025). (LMF) (JSON) (RDF) (WNDB)
2025 Plus (Released 31st December 2025). (LMF) (JSON) (RDF) (WNDB)
2024 Edition (Released 1st November 2024). (LMF) (RDF) (WNDB)
2023 Edition (Released 31st October 2023). (LMF) (RDF) (WNDB)
2022 Edition (Released 31st December 2022). (LMF) (RDF) (WNDB)
2021 Edition (Released 9th November 2021). (LMF) (RDF) (WNDB)
2020 Edition (Released 17th April 2020). (LMF) (RDF) (WNDB)
2019 Edition (Released 17th April 2019). (LMF) (RDF) (WNDB)
The size of each resource is as follows
Edition Words Synsets Relations
2025+ 161,875 120,564 419,226
2024 161,705 120,630 419,168
2023 161,338 120,135 415,905
2022 161,221 120,068 386,437
2021 163,161 120,039 384,505
2020 163,079 120,052 385,211
2019 160,051 117,791 378,201
Princeton 3.1 159,015 117,791 378,203
The size of the core resources are as follows
Edition Words Synsets Relations
2025 135,969 107,519 355,064
Usage
To compile these into a single file please use the following script(s)
python scripts/from_yaml.py
This will create a file at wn.xml that contains the complete wordnet.
Further conversions are available through the converter here.
WN is a Python library that can be used to work with Open English Wordnet.
import wn
wn.download("oewn:2025+")
oewn = wn.Wordnet("oewn:2025+")
Changes
We welcome changes, to make a change please read our contributing guidelines and make a pull request.
Open English Wordnet is a high-quality resource that acts as a gold-standard for natural language processing, as such we cannot accept any automatically generated results that have not been manually validated.
Please be aware that we use the Global WordNet Association LMF and please read the guidelines for using the format
License
Open English Wordnet is released under CC-BY 4.0
References
The canonical citation for English Wordnet is:
John P. McCrae, Alexandre Rademaker, Francis Bond, Ewa Rudnicka and Christiane Fellbaum (2019) English WordNet 2019 – An Open-Source WordNet for English. In Proceedings of the 10th Global WordNet Conference – GWC 2019, Wroclaw
More recent papers describing it include:
John Philip McCrae, Alexandre Rademaker, Ewa Rudnicka, Francis Bond (2020) English WordNet 2020: Improving and Extending a WordNet for English using an Open-Source Methodology. In Proceedings of the LREC 2020 Workshop on Multimodal Wordnets (MMW2020), Marseille
John P. McCrae, Michael Wayne Goodman, Francis Bond, Alexandre Rademaker, Ewa Rudnicka, Luis Morgado Da Costa (2020) The GlobalWordNet Formats: Updates for 2020. In Proceedings of the 11th Global Wordnet Conference (GWC2021), University of South Africa (UNISA)
It incorporates material from:
Christiane Fellbaum, editor (1998) WordNet: An Electronic Lexical Database. The MIT Press, Cambridge, MA.
Merrick Choo Yeu Herng and Francis Bond (2021) Taboo wordnet. In Proceedings of the 11th Global Wordnet Conference (GWC2021), University of South Africa (UNISA).
Contributors
John P. McCrae
Alexandre Rademaker
Ewa Rudnicka
Bernard Bou
Daiki Nomura
David Cillessen
Ciara O'Loughlin
Cathal McGovern
Francis Bond
Eric Kafe
Michael Wayne Goodman
Merrick Choo Yeu Herng
Enejda Nasaj
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Figure: AI synonym management screen.

300.000 - Manage Synonym Phrases

Screen | 2026-05-11 00:00:00 SN_AIPhrasesAI

300.000 Manage Synonym Phrases

Purpose

Use this screen to manage full phrases that should map to one canonical term for AI retrieval, keyword expansion, search interpretation, and phrase normalization.

This screen is different from single-word synonym maintenance.

Single-word synonym maintenance links one word to another word.

This screen links a longer natural-language phrase to one standard canonical term.

The purpose is to help the AI system recognize that users often ask with full conversational wording, while the internal system may store, index, or weight a shorter standard term.

Examples include:

late fee notice -> latefee

move out inspection -> inspection

owner draw check -> ownerdraw

security deposit refund -> depositrefund

tenant payment receipt -> paymentreceipt

This allows the AI to understand the user's longer wording while still consolidating meaning to one standard term. :contentReference[oaicite:0]{index=0}

HowTheCorrelationWorks

Each record stores one phrase-to-term relationship.

PhraseText is the wording users type, say, or that documents contain.

CanonicalTerm is the one standard term that the system should treat as the main normalized concept.

The phrase does not point to another phrase family here. It points to one canonical term.

That means this table is a many-phrases-to-one-term design.

Example:

late fee notice -> latefee

notice of late fee -> latefee

late rent charge notice -> latefee

All three rows correlate to the same CanonicalTerm: latefee.

So when the user searches one of those longer phrases, the AI can reinforce or substitute the canonical term latefee during interpretation or retrieval.

This is simpler than the synonym group table because each row stands on its own and maps directly to one standard term. :contentReference[oaicite:1]{index=1}

WhyThisMatters

Users often ask in full phrases, not isolated keywords.

Documents also contain natural phrases that may not exactly match the internal term you want the AI to weight.

Without phrase mapping, the system may miss strong matches.

With phrase mapping, the AI can convert a user phrase into the exact internal meaning you want it to prioritize.

This improves retrieval consistency, answer quality, and interpretation of business language.

DetailedFieldMeaning

PhraseID is the numeric key for the row.

PhraseText is the full phrase as it appears in natural language.

CanonicalTerm is the standard internal term that the phrase should map to.

Strength is the weight of the phrase-to-term correlation.

Notes is freeform explanation of why the phrase exists, what it means, or when it should be used. :contentReference[oaicite:2]{index=2}

FieldByFieldExplanation

PhraseID

This is the unique numeric identifier for the row.

It is used for select, update, and delete operations.

Users normally do not think in terms of PhraseID meaning. It is mainly the technical key.

PhraseText

This is the exact user-style phrase, business phrase, screen phrase, or document phrase that should be recognized.

It can be conversational, procedural, or business-specific.

Examples:

apply owner draw

print vendor check

move out inspection

tenant late charge notice

Use PhraseText for the way users really speak or write.

CanonicalTerm

This is the one standard target term you want the AI to use as the internal meaning.

It should be stable, concise, and reused consistently.

Examples:

ownerdraw

vendorcheck

inspection

latefee

Think of CanonicalTerm as the official normalized meaning.

Strength

This is the degree of confidence in the mapping.

A value of 1.00 means the phrase is treated as a very strong or exact phrase correlation.

A lower value means the phrase is related but not quite as exact.

Examples:

1.00 = exact intended phrase mapping

0.90 = very strong phrase mapping

0.75 = moderately related phrase

Use lower values when the phrase is close in meaning but not always exact.

Notes

Use Notes to explain why the row exists.

Notes are especially useful when the phrase is not obvious, when business users use a special expression, or when the phrase should only be used for a certain interpretation.

Example note:

Used in tenant communication letters where late charge is described in full sentence form.

HowToUse

Use Add to create a new phrase correlation.

Enter the natural language phrase in PhraseText.

Enter the normalized standard target in CanonicalTerm.

Set Strength.

Add Notes if needed.

Press Save.

Use Search to find existing phrase correlations before adding new ones.

Use Select to open an existing row for review or editing.

Use Delete when the phrase mapping should no longer be used. :contentReference[oaicite:3]{index=3}

Examples

Example 1:

PhraseText = late fee notice

CanonicalTerm = latefee

Strength = 1.00

Meaning: whenever the system sees or receives the phrase late fee notice, it should strongly associate that with the internal concept latefee.

Example 2:

PhraseText = move out inspection

CanonicalTerm = inspection

Strength = 0.95

Meaning: the user may ask with a longer phrase, but the main internal concept is inspection.

Example 3:

PhraseText = owner draw check

CanonicalTerm = ownerdraw

Strength = 1.00

Meaning: the phrase should reinforce the specific accounting or payment concept ownerdraw.

Example 4:

PhraseText = tenant payment receipt

CanonicalTerm = paymentreceipt

Strength = 0.90

Meaning: the phrase may appear in user requests, but the system should standardize toward paymentreceipt.

Example 5:

PhraseText = notice of lease expiration

CanonicalTerm = leaseexpiration

Strength = 1.00

Meaning: different wording still resolves to one canonical lease concept.

PurposeOfCanonicalTermDesign

The CanonicalTerm design avoids scattering meaning across many slightly different phrases.

Instead of teaching the AI every possible phrase independently, you consolidate all related wording into one standard target.

This gives cleaner keywording, cleaner retrieval logic, and cleaner weighting.

It also makes maintenance easier because multiple PhraseText rows can point to the same CanonicalTerm.

Example:

security deposit refund -> depositrefund

refund of security deposit -> depositrefund

tenant deposit refund -> depositrefund

All three phrases reinforce one canonical concept.

GoodDesignPractices

Use PhraseText for the wording people actually use.

Use CanonicalTerm for the stable internal meaning.

Keep CanonicalTerm consistent across rows.

Use Strength carefully. Do not assign 1.00 to vague phrase matches unless they are truly exact.

Use Notes when the phrase is ambiguous or business-specific.

BadDesignExamples

Bad example 1:

PhraseText = check

CanonicalTerm = payment

This is too broad and ambiguous.

Bad example 2:

PhraseText = move out

CanonicalTerm = inspection

This may be too narrow if move out could also refer to deposit refund, lease end, or final billing.

Bad example 3:

Using many different CanonicalTerm spellings for the same concept such as latefee, late_fee, and late charge.

Pick one standard and keep it consistent.

SearchAndPaging

The screen allows searching by PhraseText and CanonicalTerm.

Phrase results are paged.

The default ordering uses PhraseText and CanonicalTerm.

Use paging controls First, Prev, Next, and Last to move through the list.
:contentReference[oaicite:4]{index=4}

ButtonsAndActions

Add starts a new phrase row.

Save creates or updates the row.

Search filters the phrase list.

Cancel clears the detail area.

Delete removes the selected row.

Select opens a phrase row from the grid.

Reset clears search filters.

Troubleshooting

If Save fails, verify PhraseText is entered.

If Save fails, verify CanonicalTerm is entered.

If Strength is invalid, enter a numeric value.

If Notes are too long, shorten them.

If phrase correlation seems too weak, increase Strength moderately.

If results become too broad, reduce Strength or revise CanonicalTerm.

If users still cannot find content, add more real-world PhraseText rows that map to the same CanonicalTerm.

SecurityAndControl

Only authorized users should maintain phrase correlations.

This table influences how the AI system interprets multi-word requests and document wording.

Poor phrase mapping can reduce accuracy across the system, while good phrase mapping can greatly improve answer quality. :contentReference[oaicite:5]{index=5}

Images

Figure: AI synonym phrase management screen.

400.000 - Change the Open AI API Key

Screen | 2026-05-11 00:00:00 SN_AIHost

400.000 Change the Open AI API Key

Purpose

Use this screen to replace the secure OpenAI API key stored in the system host configuration file.

This screen is one of the highest-risk administrative screens in the AI subsystem.

This screen is intended only for trusted administrators with the highest security access.

The screen reads the current secure AI host configuration from the protected file, displays the non-sensitive settings for reference, and allows entry of one replacement API key only. :contentReference[oaicite:0]{index=0}

CriticalWarning

WARNING: IF YOU CHANGE THE TOKEN KEY AND IT IS INCORRECT, THE ENTIRE AI

SYSTEM WILL STOP WORKING.

WARNING: CHAT CALLS, VECTOR CALLS, AND OTHER OPENAI-DEPENDENT FUNCTIONS MAY FAIL IMMEDIATELY.

WARNING: IF THE WRONG KEY IS SAVED, YOU MAY NEED TO CALL AN ADMINISTRATOR TO PERFORM A MANUAL RESTORE OF THE PRIOR KEY FROM THE SECURE BACKUP FILE.

WARNING: THIS SCREEN SHOULD BE USED ONLY WHEN A REAL KEY REPLACEMENT IS REQUIRED.

Processing

The screen first reads the secure file /secure/aihost.txt using the server physical base path stored in session.

That secure file is the source of truth for the provider, host, current stored key, chat model, and embed model.

The current stored API key is loaded internally for validation and processing, but it is never displayed on the screen.

When Save is pressed, the program validates security, confirms the secure file can be read, validates that the replacement key is present, creates a full backup copy of the current aihost.txt file, writes attempt log entries, and then writes a full replacement secure file in canonical format.

The file is rewritten completely, not partially updated.

The canonical file format is:

provider=openai

host=https://api.openai.com

apikey=NEW_KEY_HERE

chatmodel=gpt-5.4

embedmodel=text-embedding-3-large

After a successful save, the program clears the replacement field, stores the new current key internally, and writes success log entries.

If Cancel is pressed, the replacement entry field is cleared only. The secure file is not changed.
:contentReference[oaicite:1]{index=1}

WhereToFind

Main Menu to AI Tables Management to AI Host Configuration.

Images

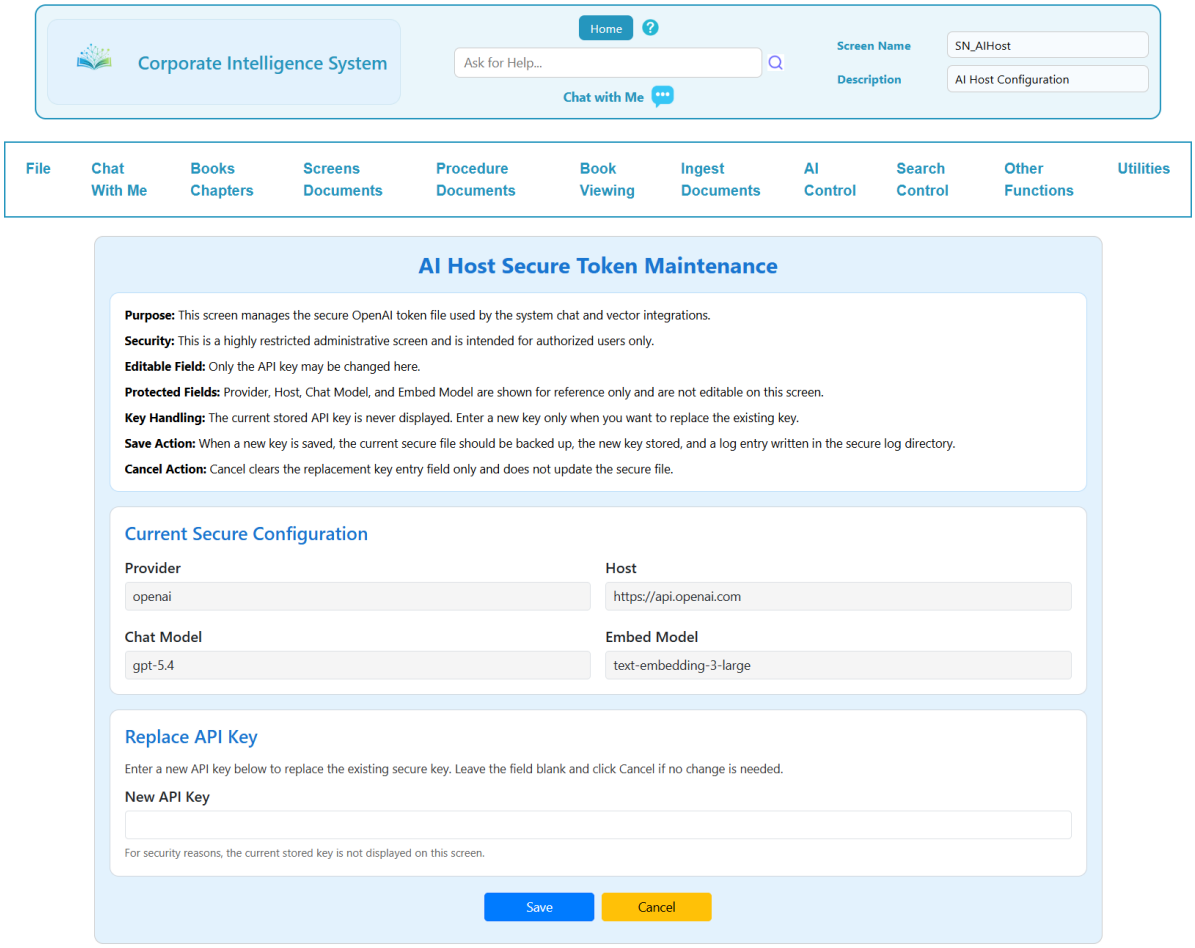


Figure: Secure OpenAI API key replacement screen.

ButtonsAndActions

Save validates the replacement key, creates a backup of the existing secure host file, writes the new secure file, and logs the change attempt and result.

Cancel clears the replacement API key entry field only.

HowToUse

Open the screen and first verify the reference values for Provider, Host, Chat Model, and Embed Model.

These values are read from the current secure host file and are shown only for confirmation.

Enter the new replacement API key into the New API Key field.

Carefully review the pasted key before saving.

Press Save only when you are certain the new key is correct and active.

Use Cancel if you pasted the wrong value or want to abandon the change.

Do not make repeated experimental changes on this screen.

FieldsOrSettings

Provider is the provider value from the secure host file.

This is a protected read-only field.

It confirms which AI provider the system is configured to use.

Host is the API host URL from the secure host file.

This is a protected read-only field.

It confirms the endpoint base used for the AI calls.

Chat Model is the configured chat model from the secure host file.

This is a protected read-only field.

It tells the administrator which chat model is currently configured for normal AI chat requests.

Embed Model is the configured embedding model from the secure host file.

This is a protected read-only field.

It tells the administrator which model is used for vector or embedding operations.

New API Key is the only editable field on the screen.

This field is for the replacement OpenAI API key only.

The current stored key is never displayed here for security reasons.

Current API Key exists internally in program logic but is intentionally not rendered in the browser.

It is used for secure processing logic only. :contentReference[oaicite:2]{index=2}

ProtectedBehavior

The system intentionally hides the current key from the browser.

The replacement field is blank on screen load.

The screen reads the secure file each time so the file remains the source of truth.

The replacement key is never written to logs.

The backup process copies the entire current secure file before replacement.

The log process records the action, result, backup file name, target file name, screen name, and user ID, but not the key itself. :contentReference[oaicite:3]{index=3}

BackupAndRecovery

Before the new key is written, the program creates a full backup copy of the current /secure/aihost.txt

file.

The backup is stored under /secure/archive.

The backup naming pattern is:

aihost_YYYYMMDD_HHMMSS_UserID.txt

This backup is critical because a manual restore may be required if the new key is invalid and the system stops functioning.

The program also writes secure log entries under /secure/log.

The log file is append-only and records administrative change activity.
:contentReference[oaicite:4]{index=4}

KeysAndScope

This screen manages the secure file aihost.txt.

It does not manage ordinary database rows.

It also writes to secure archive and secure log directories.

This screen affects the full AI runtime configuration for chat and vector integrations.

This screen does not manage prompt content, chunking logic, synonym tables, or stop-word tables.

RulesAndValidations

Only users with group 38 write access and security level 1 may update this screen.

The secure host file must exist and be readable.

Provider, Host, Chat Model, and Embed Model must all be present in the secure file.

The replacement API key must not be blank.

The backup file must be created successfully before the new host file is written.

The new host file must be written successfully and confirmed to exist with content.

The replacement field is cleared after a successful save.

The current key is never shown in the HTML. :contentReference[oaicite:5]{index=5}

DownstreamEffects

A correct new key allows continued AI chat and embedding operations after key rotation.

An incorrect new key can cause OpenAI HTTP failures, chat failures, vector failures, and other AI integration errors.

Because the secure host file is rewritten fully, any corruption or wrong replacement can affect the entire AI subsystem immediately.

This screen therefore has global impact across the platform.

Examples

Example 1: The existing key is being retired by OpenAI or by the account owner. The administrator receives a verified replacement key, pastes it into New API Key, and saves it. The prior secure file is backed up first, the new file is written, and the change is logged.

Example 2: The administrator pastes an incomplete or mistyped key and presses Save. The file is still replaced if validation passes structurally, but later chat or embedding calls may fail. Manual restore from the backup file may be needed.

Example 3: The administrator opens the screen only to verify Provider, Host, Chat Model, and Embed Model. No new key is entered, and Cancel is used to clear any accidental replacement text.

Troubleshooting

If the screen says the secure AI host file cannot be read, verify the session FilePhysicalBase value and the existence of /secure/aihost.txt.

If Save reports that the new API key is missing, enter a replacement key before saving.

If backup creation fails, do not proceed until the archive path problem is corrected.

If the new key is stored but AI calls fail afterward, suspect an invalid replacement key first.

If the system stops working after the change, locate the archived backup file and have an authorized administrator manually restore the prior aihost.txt file.

If log writing fails but the key was stored, the program may warn that the new key was saved even though the log entry could not be written.

SecurityAndAccess

This screen is restricted to the highest administrative level.

Read and write access are not enough by themselves; the program also requires security level 1 for update activity.

The current key is intentionally hidden from the browser.

Backups and logs are written to secure server-side directories only.

This screen must never be used casually or by non-administrative users.
:contentReference[oaicite:6]{index=6}

700.000 - How to Use the Chat AI Agent

10.000 - Intro to the AI Chat Agent

Screen | 2026-05-11 00:00:00 ChatIntro

10.000 Intro to the AI Chat Agent

Purpose

The AI Chat Agent is the primary conversational workspace of the Corporate Intelligence System.

It allows users to ask questions, retrieve company knowledge, request explanations, create reusable output, compare internal and public information, and continue work across named chat sessions.

This is not a generic chatbot added to a business screen.

It is a controlled business AI workspace built around retrieval, user options, conversation continuity, source evidence, and practical operating controls.

WhyThisMatters

Most organizations already have the information they need.

The problem is that the information is scattered across manuals, files, reports, procedures, spreadsheets, email, systems, and employee experience.

A user may not know the exact document name.

A user may not know the correct business term.

A user may ask the question in everyday language while the manual uses formal policy language.

The AI Chat Agent is designed to bridge that gap.

NotAOneSizeFitsAllChatBox

One of the market strengths of this platform is that the user controls how the AI works for the task at hand.

The same question can require different handling depending on the user, the audience, the risk, and the purpose of the answer.

A manager may want a detailed policy explanation.

An employee may want a simple answer.

A supervisor may want a checklist.

An administrator may want to review sources and performance.

The screen provides options so users are not trapped inside one fixed response style.

UserControlledOptions

The Chat screen allows users to guide the response through operating options.

Summary requests a shorter answer.

Detail provides deeper explanation when Summary is not selected.

Copy Box returns reusable output that can be copied and used in letters, procedures, emails, or documentation.

Stream returns normal readable response text when Copy Box is not selected.

DB Search Only keeps the answer focused on internal company knowledge.

DB and Public Search allows internal knowledge and public information to be returned when appropriate.

Use Domain applies the selected business domain as a search and ranking hint.

Show Files displays related source files when available.

These options make the AI Chat Agent practical for real business use.

PrivateKnowledgeAndOptionalPublicInformation

The system can answer from private company knowledge when internal accuracy is required.

It can also include public information when the user wants comparison, general guidance, or outside context.

This distinction is important.

Internal policies, procedures, manuals, and company-specific documents should control internal business answers.

Public information may be useful for comparison, education, and general research, but it should not replace controlled company knowledge.

ConversationContinuity

The AI Chat Agent supports continuing work across a named chat thread.

Instead of treating each question as a disconnected event, the system can preserve the conversation flow and use summary information to maintain context.

This allows the user to build on prior questions, refine answers, request follow-up work, and return to the same topic later.

That makes the chat session a working file, not just a temporary message exchange.

UserPreferences

The platform can also apply user preference instructions.

These preferences help shape how the AI responds for a particular user.

A user may prefer brief answers, detailed reasoning, action steps, copy-ready output, or a particular communication style.

The system can include those preferences with requests so the AI response better matches how the user works.

SourceEvidence

When supporting files are available and Show Files is selected, the system may display source documents related to the response.

This helps users verify where information came from.

For business systems, source evidence matters because answers must be trusted, reviewed, and sometimes defended.

The goal is not only to generate an answer.

The goal is to generate a useful answer connected to the knowledge that supports it.

WhoUsesTheChatAgent

The AI Chat Agent can support different types of users.

Employees can ask plain-language questions about policies, procedures, benefits, training, or daily operations.

Managers can request summaries, checklists, comparisons, and decision support.

Administrators can review results, examine performance, and improve the knowledge system.

Developers and technical staff can use the system to understand procedures, program documentation, and operational rules.

The screen is designed for broad business use, not only technical users.

BusinessValue

The AI Chat Agent helps reduce repeated questions, shorten research time, improve consistency, and preserve institutional knowledge.

It gives users a practical way to work with company knowledge without requiring them to know where every document is stored.

It also gives the organization a controlled way to make knowledge usable instead of leaving it buried in files.

Summary

The AI Chat Agent is the main working interface for asking questions and receiving controlled AI responses from company knowledge.

Its strength comes from user options, retrieval logic, source evidence, conversation continuity, and personalized instructions.

It is built to make organizational knowledge easier to find, easier to use, and more valuable in daily operations.

ConfidentialImplementationNotice

Certain implementation details including retrieval scoring logic, instruction construction, and ranking algorithms are proprietary and are intentionally not disclosed.

These elements are considered confidential trade secrets of the system.

20.000 - How the Chat AI Agent Works

Screen | 2026-05-11 00:00:00 ChatHow

20.000 How the Chat AI Agent Works

Purpose

This section explains how the AI Chat Agent processes a request and why its answers are different from a simple prompt sent directly to an AI model.

The system uses a retrieval-first design.

That means the platform attempts to locate useful supporting knowledge before the final answer is generated.

The quality of the answer depends on the question, the selected options, the available source material, and the ranking logic used to choose supporting evidence.

TheBasicFlow

The user enters a question or instruction on the Chat screen.

The user selects options such as Summary, Copy Box, DB Search Only, DB and Public Search, Use Domain, and Show Files.

The system reads the current chat context, selected business domain, user preferences, and conversation history.

The request is analyzed for meaning and important terms.

The system searches available knowledge sources and ranks candidate chunks.

The strongest supporting content is selected.

The final request is sent to the API with the user question, selected evidence, context, and instructions.

The response is returned, displayed, stored, and made available for future history and reporting.

RetrievalBeforeResponse

The most important design principle is retrieval before response.

The system should not depend only on the AI model's general knowledge when company knowledge is required.

It first tries to locate relevant internal content such as manuals, policies, procedures, documents, screens, uploaded files, and indexed knowledge records.

Only after support material is selected does the final response get generated.

This approach improves accuracy, consistency, and explainability.

RequestUnderstanding

The system analyzes the user's request using more than one signal.

A request may contain formal business terms, casual employee wording, misspellings, abbreviations, phrases, or incomplete language.

The system attempts to identify what the user is really asking for by using keyword analysis, phrase handling, synonym support, phonetic matching, metadata, and vector meaning.

This is important because real users do not always ask questions using the same words that appear in company documents.

KeywordSignals

Keywords help the system locate exact terms that matter.

These may include policy names, department names, procedure terms, screen names, document names, legal terms, accounting terms, employee benefit terms, or operational phrases.

Exact keyword matches are valuable because they can identify strong direct connections between the request and stored knowledge.

However, keyword matching alone is not enough because users often ask in different language than the source document uses.

SynonymSignals

Synonyms help connect different words that may mean the same thing in business context.

For example, an employee may ask about time off while a manual uses paid leave.

A manager may ask about overtime eligibility while a policy may use hours of work, lieu time, or compensatory time.

Synonyms help the system bridge that language gap.

This is one of the strongest differentiators of the platform because it supports how real people ask questions.

PhraseSignals

Many important business ideas are phrases, not single words.

Examples include sick leave policy, employee onboarding, overtime approval, lease renewal, purchase order approval, and password reset procedure.

The system can evaluate phrase relationships so the meaning of the request is not reduced to isolated words.

This improves retrieval quality for business questions where the full phrase carries the real intent.

PhoneticSignals

Phonetic matching helps when words are misspelled, entered quickly, or sound similar.

This matters because users often type the way they speak.

A practical search system must tolerate imperfect wording.

Phonetic support helps recover useful matches that ordinary exact search may miss.

MetadataSignals

Metadata gives the system structured information about the source material.

Metadata may include business domain, document type, audience, topic, screen name, book, chapter, section, source identity, or other classification fields.

When metadata matches the request, it can strengthen the ranking of a candidate result.

This helps the system prefer content that belongs to the right business area and the right document purpose.

VectorMeaningSignals

Vector search helps locate content that is similar in meaning even when exact words do not match.

This allows the system to find related concepts and semantically close material.

Vector proximity is especially useful when the user asks naturally and the source content is written formally.

Vector search is powerful, but the platform does not rely on vectors alone.

The system combines vectors with keywords, synonyms, phonetics, metadata, and weighting logic.

BusinessDomainWeighting

When Use Domain is selected, the selected business domain becomes part of the retrieval guidance.

For example, the word benefits means one thing in Human Resources and something different in finance or insurance.

Business domain weighting helps steer the search toward the correct subject area.

This improves relevance and reduces unrelated results.

WeightedRanking

The system can apply weights to different matching signals.

A candidate chunk may be strengthened by exact keyword matches, synonym matches, phrase matches, phonetic matches, metadata matches, vector proximity, business domain relevance, authority, or recency.

The combined score helps decide which chunks are most useful for the final response.

This ranking process is one of the reasons the system is more powerful than ordinary search.

SelectedChunks

A chunk is a selected piece of source content that may support the answer.

The system evaluates candidate chunks and selects the strongest evidence set for the request.

Those selected chunks may later appear in reports with rankings, weights, keyword scores, vector scores, and reasons for selection.

This makes the system more transparent than a black-box answer engine.

ConversationSummary

The system may include a running conversation summary with later requests.

This helps the AI understand prior goals, decisions, unresolved issues, and earlier responses in the same chat thread.

The user can continue a topic without restating the entire history.

This supports long-running work instead of one-question sessions.

UserPreferences

User preferences may also be included with the request.

These preferences can shape response style, level of detail, output format, or other behavior.

The same system can therefore respond differently for different users based on approved preference rules.

This is customization without rewriting the software.

ResponseGeneration

After the system prepares the request package, the API receives the question, context, selected evidence, and instructions.

The AI generates the final answer based on that package.

Depending on selected options, the user may receive an internal DB response, a public response, a stream response, a copy box response, or more than one response section.

The response is then displayed in the center conversation window and saved to the chat history.

WhyThisDesignIsDifferent

The system is not only asking an AI model to be smart.

It is building a structured request around the user's question.

It searches first.

It ranks evidence.

It applies context.

It applies user preferences.

It records cost and performance information.

It stores the result for future review.

This is the difference between a casual chatbot and an engineered business AI system.

Summary

The Chat AI Agent works by combining user options, request analysis, weighted retrieval, selected source evidence, conversation continuity, and API response generation.

Keywords, synonyms, phrases, phonetics, metadata, vectors, and business domain signals all help improve search quality.

The result is a controlled and measurable process for turning company knowledge into useful answers.

30.000 - How to Formulate Prompts for Information

Screen | 2026-05-11 00:00:00 ChatPrompts

30.000 How to Formulate Prompts for Information

Purpose

The quality of a chat response often begins with the quality of the request.

The AI Chat Agent is designed to help users even when questions are short, informal, or imperfect, but stronger prompts usually produce stronger results.

This section explains how to ask for information in ways that improve retrieval quality, response usefulness, and business value.

GoodNewsForUsers

You do not need to be a technical expert to use the Chat AI Agent.

You do not need to know prompt engineering terms.

You do not need to know the exact title of the source document.

The system is designed to understand both professional business language and everyday employee wording.

That is one of the advantages of the platform.

WhyPromptQualityStillMatters

Even though the system helps interpret requests, better prompts can still improve the final result.

A stronger request can help the system choose better keywords, match better synonyms, locate stronger chunks, and return a response in the desired format.

Good prompting saves time and reduces follow-up corrections.

TwoCommonUserStyles

Business systems usually receive questions from different kinds of users.

Some users ask in professional or managerial language.

Other users ask in natural everyday language.

The Chat AI Agent is built to support both.

ExampleHumanResourcesManager

A Human Resources manager may ask:

Provide a summary of employee sick leave eligibility for full-time staff and include carryover limitations.

This request contains formal business wording such as summary, eligibility, full-time staff, and carryover limitations.

Those terms can align strongly with policy manuals and HR documents.

ExampleEmployeeQuestion

An employee may ask:

What is the sick leave policy and how many days do I get?

This request uses simpler everyday wording.

The system can still connect terms such as sick leave policy, days, get, and related synonyms to the correct material.

Both users can receive strong answers even though they ask differently.

ExampleAccountingManager

An accounting manager may ask:

Explain the month-end bank reconciliation procedure and identify required approvals.

This is structured and department-specific language.

ExampleGeneralEmployeeAccountingQuestion

A general user may ask:

How do I balance the bank account at month end?

The wording is different, but the system can still connect the intent through synonyms, phrase logic, and meaning signals.

HowTheSystemBridgesLanguageGaps

The platform can improve results by combining multiple search signals.

These may include exact keywords, phrase matching, synonyms, phonetic logic, metadata, vector meaning, and business domain hints.

This means a formal manual phrase and an employee phrase can still lead to the same useful answer.

That is especially valuable in Human Resources, Payroll, Operations, Accounting, Property Management, and other business areas where users speak differently than documents are written.

Sample of a Well constructed question

This section demonstrates how the Chat AI Agent can analyze uploaded spreadsheets containing financial and operational information.

Spreadsheets may include columns such as Account, Business Unit, Currency, Year, Scenario, and monthly values from January through December.

The AI can filter the data, perform calculations, summarize totals, and present the results in a clear business format.

In this example, a financial spreadsheet contains revenue, cost of goods sold, and expense categories for multiple business units and years.

The user asks the Chat AI Agent to summarize annual financial results for one business unit and

calculate Gross Profit.

Example Question: From the Monthly Expense Report, for business unit Software and year 2013, calculate annual Revenue from Sales, annual Cost of Goods Sold, Gross Profit, and annual expenses by category using January through December.

Example Answer:

Revenue from Sales: $904,931,992

Cost of Goods Sold: ($403,357,380)

Gross Profit: $501,574,612

Commissions Expense: ($39,830,584)

Payroll Expense: ($102,561,420)

Travel and Entertainment Expense: ($10,393,138)

Research and Development Expense: ($40,279,196)

Consulting Expense: ($52,179,585)

Software and Hardware Expense: ($70,381,297)

Marketing Expense: ($19,956,382)

This example illustrates how the Chat AI Agent can transform spreadsheet data into meaningful financial summaries and management reports.

HowToWriteBetterPrompts

Strong prompts usually contain one or more of the following elements.

Clear topic.

Specific audience.

Desired format.

Level of detail.

Business context.

Desired outcome.

Examples or comparisons if needed.

WeakVsStrongPromptExamples

Weak prompt:

Vacation.

Better prompt:

Explain the employee vacation accrual policy.

Strong prompt:

Create a supervisor guide explaining employee vacation accrual rules, eligibility dates, and approval steps in bullet format.

UseAudienceInThePrompt

One of the easiest ways to improve output is to identify who the answer is for.

Examples:

Explain for a new employee.

Write for a department manager.

Prepare for Human Resources.

Summarize for executives.

Create for customers.

Audience guidance helps shape tone and level of detail.

UseFormatRequests

You can ask for a preferred output format.

Examples:

Use bullet points.

Create a checklist.

Provide a short summary first.

Use a table.

Write an email draft.

Provide step-by-step instructions.

This often reduces editing later.

UseBusinessContext

Adding department or operational context can improve search quality.

Examples:

For Human Resources.

For Payroll processing.

For leasing staff.

For property management.

For IT support.

Context helps the system prefer the right knowledge area.

UseTheChatOptionsWithPrompts

The Chat screen options work together with prompt wording.

If you need a short answer, use Summary and ask directly.

If you need reusable content, enable Copy Box.

If internal policy matters most, use DB Search Only.

If comparison to outside standards is needed, use DB and Public Search.

If subject matter is known, enable Use Domain.

Prompt quality and screen options together often produce the best result.

FollowUpQuestionsArePowerful

You do not need one perfect prompt.

You can refine the conversation through follow-up requests.

Examples:

Shorten that answer.

Add legal risks.

Rewrite for employees.

Turn into checklist format.

Compare to public standards.

Show likely exceptions.

This is one of the advantages of continuing work inside the same chat thread.

WhenResultsAreWeak

If the answer feels weak, try improving the request.

Be more specific.

Add the department.

Add the audience.

Ask for a format.

Use a follow-up question.

Enable Use Domain.

Switch from Summary to Detail.

Sometimes the issue is the prompt, not the AI.

RealWorldExamples

Employee style:

Can I cash out unused vacation days?

Manager style:

Explain the company rules regarding payout of unused accrued vacation balances upon termination or year-end.

Both can work.

The second prompt may produce more structured business detail.

Summary

The Chat AI Agent is designed to understand both professional business wording and everyday employee questions.

Better prompts still improve results by helping the system retrieve stronger evidence and shape better output.

Clear topic, audience, format, and context usually lead to faster and more useful answers.

50.000 - How to Evaluate Improve Chat Performance

Screen | 2026-05-11 00:00:00 ChatPerform

50.000 How to Evaluate Improve Chat Performance

Purpose

The AI Chat Agent is designed not only to provide answers, but to support evaluation, monitoring, and continuous improvement of those answers over time.

This section explains how users and administrators can review chat performance and use system feedback to improve overall results.

This capability is a key differentiator of the platform and reflects an engineered approach to AI rather

than a simple question-and-answer tool.

WhyPerformanceEvaluationMatters

Many AI systems return answers without providing visibility into how those answers were produced.

This platform provides structured feedback that allows users to evaluate response quality and identify opportunities for improvement.

This approach supports accuracy, consistency, and long-term system improvement.

ProprietaryProcessingNotice

The system uses proprietary internal methods to evaluate relevance and select supporting information.

Specific scoring methods, weighting logic, and ranking algorithms are intentionally not disclosed and are considered confidential trade secrets.

All evaluation information presented in reports is designed to support operational understanding without exposing protected implementation details.

PerformanceEvaluationOverview

The Chat Performance Evaluation process provides insight into how a request was handled and how results were produced.

This includes reviewing the request, examining the response, and understanding how well the system aligned the answer with available knowledge.

The goal is not to expose internal mechanics, but to provide actionable insight for improving results.

ChatPerformanceReport

The Chat Performance Report presents a structured view of a conversation.

It includes session-level information, message-level review, and diagnostic summaries.

Chat Performance Report - User ivan Conversation 1

Chat Performance Evaluator

User: ivan | Conversation: 1 | Chat: Employment Issues
Generated: 2026-04-26 20:32:03
Report Mode: Level 1 Diagnostic / Performance Evaluator

Chat Session Summary

Item	Value
UserID	ivan
ConversationID	1
ChatName	Employment Issues
StartDate	2026-04-20 10:54:14
LastDate	2026-04-25 20:12:00
ActiveSw	Y
SessionInputTokens	114709
SessionOutputTokens	4244
SessionTotalTokens	118953

This section typically includes:

Conversation identification details.

Start and last activity dates.

Token usage and overall activity levels.

Message-by-message request and response review.

This provides a complete operational snapshot of the chat session.

KeywordSynonymDiagnosticSummary

The Keyword and Synonym Diagnostic Summary is one of the most valuable sections of the report.

Keyword / Synonym Diagnostic Summary

Diagnostic Item	Value
Messages Evaluated	3
Synonym Candidate Rows	52
Strong Candidate Rows	34
Review Candidate Rows	18

Missing Keyword Findings	46
Vector Strong / Keyword Weak Findings	0
Phrase Weakness Findings	16

This section evaluates how effectively the system interpreted the language used in the request.

It highlights areas where terminology aligned well with available knowledge and areas where improvement may be needed.

It may identify strong matches, review candidates, and opportunities to improve keyword and phrase alignment.

TheImportanceOfSynonyms

One of the most common challenges in business systems is the difference between how users ask questions and how information is written in manuals or documents.

A user may use informal or conversational wording, while the underlying content may use formal or technical language.

This gap can reduce search effectiveness if not addressed.

The platform addresses this challenge through a structured synonym and phrase-matching approach.

This allows the system to connect different forms of language that represent the same concept.

This includes alternate wording, common variations, and natural differences in how users communicate.

This capability significantly improves retrieval quality and is one of the core strengths of the system.

SynonymRecommendations

The Synonym Recommendations section provides guidance on how to improve system performance.

Synonym Recommendations

Showing up to 50 recommendation rows. Strong rows are listed before review rows.

Message	Strength	Request Term	Candidate Manual Term	Reason	Action
1	STRONG	companies overtime policy	attendance and punctuality	Request keyword was not found in selected chunk keyword rows.	Consider adding a synonym, phrase, abbreviation, or misspelling entry.
	Request: What is my companies overtime policy				
1	STRONG	companies overtime policy		Multi-word request phrase was not found as a selected chunk keyword.	Consider adding or strengthening a phrase synonym row instead of relying only on individual words.
	Request: What is my companies overtime policy				
1	STRONG	hr overtime policy	attendance and punctuality	Request keyword was not found in selected chunk keyword rows.	Consider adding a synonym, phrase, abbreviation, or misspelling entry.
	Request: What is my companies overtime policy				
1	STRONG	hr overtime policy		Multi-word request phrase was not found as a selected chunk keyword.	Consider adding or strengthening a phrase synonym row instead of relying only on individual words.

This section identifies opportunities to better align user language with stored knowledge.

It may suggest additional terms, phrase adjustments, or alternative wording that can improve future results.

These recommendations are intended to support system refinement and improved user experience.

SelectedResultsReview

The report may also provide insight into which content was selected to support the response.

This includes relative ranking information and contributing factors such as keyword relevance, synonym alignment, contextual similarity, and overall match quality.

This helps users and administrators understand whether the system is selecting appropriate supporting material.

ContinuousImprovementApproach

The system is designed to improve over time through a continuous feedback process.

Users ask questions and receive responses.

Performance reports highlight strengths and areas for improvement.

Administrators can refine terminology, improve content alignment, and enhance overall system behavior.

This creates a cycle of ongoing improvement rather than a static system.

UserLevelImprovements

Users can improve results by refining how they ask questions and how they use system options.

This may include providing clearer context, selecting appropriate options, and using follow-up requests to refine output.

These actions often improve response quality without requiring system changes.

AdministrativeImprovements

Administrators can improve system performance by reviewing diagnostic feedback and making controlled adjustments.

This may include improving terminology alignment, enhancing content organization, and refining how knowledge is structured.

These improvements help ensure that future users receive stronger and more consistent results.

StrategicValue

The performance evaluation capability transforms the system from a simple AI interface into a managed knowledge platform.

It provides visibility, control, and a structured approach to improvement.

This allows organizations to continuously enhance how knowledge is retrieved and used.

Summary

The Chat Performance Evaluation process provides insight into system behavior while protecting proprietary implementation details.

It enables users and administrators to evaluate results, improve alignment between user language and stored knowledge, and strengthen system performance over time.

This combination of transparency and controlled abstraction is a key strength of the platform.

100.000 - How to use the AI Chat Agent

Screen | 2026-05-11 00:00:00 `Chat`

100.000 How to Use the AI Chat Agent

Purpose

The AI Chat Agent is the primary working screen of the Corporate Intelligence System and one of the most valuable features in the platform.

This screen combines intelligent retrieval, private company knowledge, optional public information, persistent conversation continuity, guided response formatting, source evidence access, and practical user controls in one professional workspace.

This is not a basic chat window.

It is a controlled business intelligence environment designed to help users obtain better answers faster.

Images

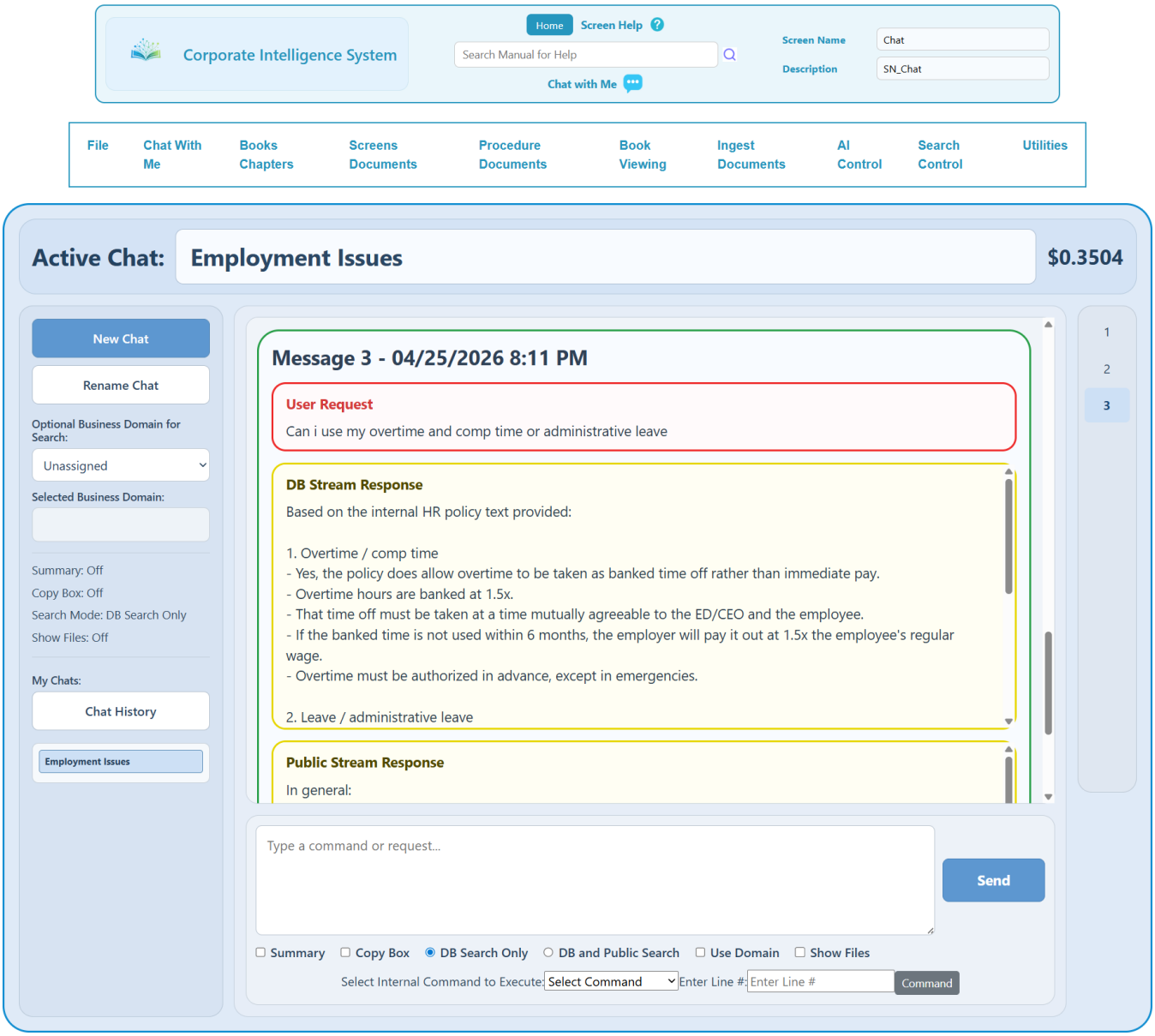


Figure: Main AI Chat Agent working screen.

WhyThisScreenIsDifferent

Many chat tools simply accept one prompt and return one answer.

This platform first searches available knowledge sources, ranks relevant evidence, applies optional business context, and then builds the final request.

The result is a stronger, more relevant, and more controlled response.

Users can also guide output style, search scope, continuity behavior, and supporting file return.

ScreenLayoutOverview

The screen is divided into five major work zones.

1. Top Active Chat bar.

2. Left control pane.

3. Center conversation window.

4. Bottom request and command area.

5. Right-side message navigation bar.

This layout is designed for productivity and fast movement through active work.

TopActiveChatBar

The top information bar displays the active chat name and the running cost of the current conversation.

The chat name helps organize separate work topics such as HR, Accounting, Leasing, Operations, or Legal research.

The running cost display provides visibility into estimated usage for the active thread.

This allows users to maintain organized work sessions and monitor activity.

LeftPaneControls

The left pane contains major operating controls and status information.

New Chat starts a new conversation and prompts for a chat name.

Rename Chat changes the current chat title.

Optional Business Domain selects a focused area such as Accounting, HR, Property, Payroll, Legal, IT, or other business subjects.

Selected Business Domain shows the active domain currently applied.

Status lines display the current operating modes such as Summary, Copy Box, Search Mode, and Show Files.

My Chats displays the most recent chat threads for quick selection and return.

This area acts as the control center for managing conversations.

SearchAndResponseOptions

The options row below the request box controls how the system searches and how results are returned.

Summary requests shorter concise answers.

Detail is used when Summary is off and returns fuller responses.

Copy Box returns structured copy-ready output blocks.

Stream is used when Copy Box is off and returns natural readable text.

DB Search Only limits retrieval to internal company knowledge.

DB and Public Search allows internal knowledge plus public information.

Use Domain uses the selected business domain as an additional retrieval hint.

Show Files displays related supporting source files when available.

These controls allow the same screen to support quick answers, deep research, letters, summaries, procedures, and training content.

CenterConversationWindow

The center pane displays the active conversation in scrollable message panels.

The screen normally shows the most recent message window while allowing movement through earlier requests.

Each panel may include:

Message number.

Date and time.

User request.

Internal knowledge response.

Public response when enabled.

Copy-ready response blocks.

This design favors readability over clutter.

ResponseTypes

Depending on selected options, the system may return one or more response sections.

DB Stream Response uses internal company knowledge and displays normal text.

Public Stream Response may appear when public search is enabled.

DB Copy Box returns internal results in reusable copy format.

Public Copy Box may also appear when public mode is enabled.

Copy Box responses may include a button to copy content directly to the clipboard.

This gives users flexibility between reading and reusing output.

SupportingFilesAndEvidence

When selected evidence contains attached source files, those files may be listed in the left pane or response area when Show Files is enabled.

Users may open or download available documents for direct review.

This helps users verify answers against original source material.

This is especially valuable for manuals, procedures, PDFs, spreadsheets, and imported records.

RightSideMessageNavigation

The right-side vertical panel lists message numbers for the active conversation.

Clicking a number immediately jumps to that message area.

Example: clicking message 4 moves directly to response 4.

This makes long chat sessions easy to navigate without excessive scrolling.

BottomRequestArea

The request area is where users type prompts, questions, follow-up requests, or instructions.

Press **Send** to launch the retrieval and AI response process.

This is the normal daily operating area of the screen.

InternalCommandArea

Below the request options is a local command area used for navigation and diagnostics.

The user selects a command from the dropdown list.

An optional line number may be entered when required.

Press **Command** to execute the local function.

Common commands include:

GO TO LINE moves directly to a selected message number.

TOP moves to the earliest messages.

BOTTOM moves to the latest messages.

CURRENT refreshes the display at the newest point.

SHOW COSTS displays usage totals and token detail.

SHOW SUMMARY displays the stored running conversation summary.

SHOW TIMINGS displays request timing information.

SHOW STATS displays additional statistics when available.

ConversationContinuity

The system maintains a running internal summary of the conversation.

This helps the AI remain aware of prior goals, decisions, open issues, and earlier answers.

Users do not need to repeat the full history each time.

This creates a stronger long-session working experience.

UserPreferences

The platform may also apply user memory and preference settings.

Examples include preferred tone, output style, formatting habits, business focus, or recurring needs.

This helps the system become more useful over time.

ExampleWorkflow

Example: A Human Resources manager wants an onboarding checklist.

1. Select Business Domain = HR.

2. Enable DB Search Only.

3. Leave Copy Box off for readable output.

4. Type: Create a new employee onboarding checklist for the first week.

5. Press Send.

The system searches internal HR material first, ranks relevant content, and returns a focused response.

If reusable output is needed later, turn Copy Box on and rerun the request.

CostsAndPerformance

The top bar shows running thread cost.

SHOW COSTS provides detailed token and message totals.

SHOW TIMINGS helps evaluate processing speed.

These tools support efficient system use and diagnostics.

Troubleshooting

If responses are too broad, enable Use Domain or DB Search Only.

If responses are too short, use Detail mode by leaving Summary off.

If reusable output is needed, enable Copy Box.

If prior context seems weak, continue working inside the same named chat.

If reviewing older work, click a message number on the right side or use GO TO LINE.

If supporting files are missing, enable Show Files.

If checking usage, use SHOW COSTS.

If checking delays, use SHOW TIMINGS.

SecurityAndAccess

Access depends on user rights.

Private company information retrieval should follow security rules.

Chat history, stored preferences, and source file access should be limited to authorized users.

Summary

The AI Chat Agent is the operational heart of the platform.

It combines retrieval, continuity memory, guided search scope, source evidence, professional formatting modes, and efficient navigation in one unified screen.

It is easy to use, powerful underneath, and designed for real business productivity.

300.000 - How to View your Chat History

Screen | 2026-05-11 00:00:00 ChatHistory

300.000 How to View your Chat History

Purpose

The Chat History screen is used to review prior chat conversations, reopen older work threads, archive inactive chats, run reports, and manage conversation records.

This screen is an important companion to the AI Chat Agent because valuable work often continues over many days or weeks.

Instead of losing prior requests and responses, users can return to earlier chats and continue where they left off.

Images

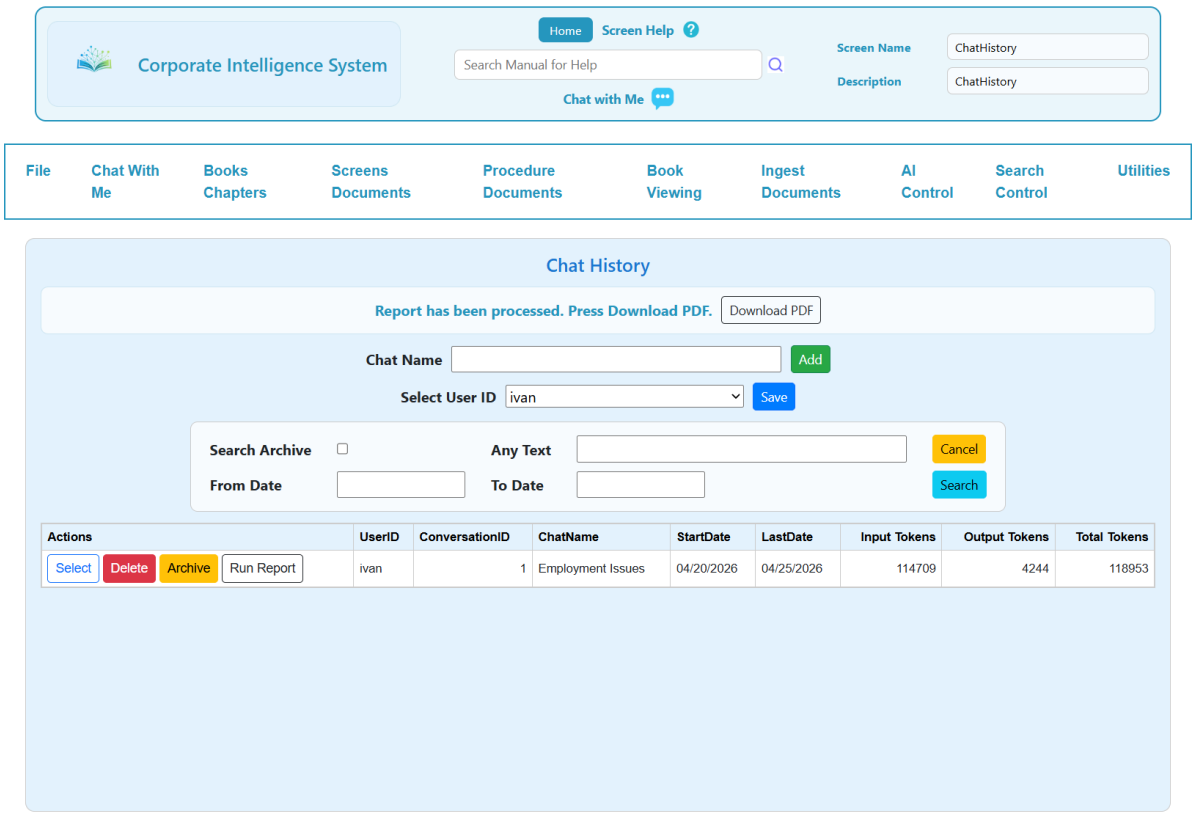


Figure: Chat History management screen.

WhyThisScreenMatters

Many chat systems treat conversations as temporary sessions.

This platform stores organized chat threads so business work can be reused later.

Users may return to prior research, policy reviews, training drafts, letters, troubleshooting sessions, and operational projects without starting over.

This helps preserve time, continuity, and institutional knowledge.

SecurityLevelBehavior

The screen changes based on the user security level.

Standard Users normally view only their own chat history.

Security Level 1 Administrative Users may select another user for review and performance evaluation purposes.

This allows management oversight, support diagnostics, training review, and system quality analysis when authorized.

TopScreenControls

The upper section of the screen contains quick management controls.

Chat Name allows entry of a new conversation name.

Add creates a new chat thread for the selected user.

Select User ID appears for authorized administrators and allows switching to another user history view.

Save confirms the selected user when applicable.

This top area is used to create or redirect history review activity.

SearchArea

The center search panel is used to filter chat history results.

Search Archive includes archived chat records.

Any Text searches chat names and related text criteria.

From Date limits results to chats on or after the selected date.

To Date limits results through the selected ending date.

Search runs the selected criteria.

Cancel clears or exits the current search action.

This allows fast retrieval of older work threads.

HistoryResultsGrid

The lower grid displays matching chat sessions.

Typical columns include:

User ID.

Conversation ID.

Chat Name.

Start Date.

Last Date updated.

Input Tokens.

Output Tokens.

Total Tokens.

This gives both organizational and usage visibility.

ActionButtons

Each row may contain action buttons used to manage the selected conversation.

Select opens the chat thread and returns to the main Chat screen.

Delete permanently removes the conversation and related history.

Archive moves an inactive chat out of the normal active list.

Unarchive restores an archived chat back to active use when available.

Run Report creates a detailed conversation report.

SelectingAChat

When Select is pressed, the chosen conversation becomes the active chat session.

The user is returned to the Chat screen where additional requests may continue inside the same thread.

This preserves continuity, prior summary memory, and historical context.

ArchiveUseCases

Archive is useful when a project is completed but may need to be referenced later.

Examples:

Completed HR investigation.

Prior payroll research.

Lease negotiation notes.

Training content project.

Vendor comparison study.

Archiving keeps the active list cleaner while preserving history.

DeleteUseCases

Delete should be used carefully.

Typical reasons include test chats, duplicate threads, accidental sessions, or obsolete temporary work.

Once deleted, the conversation history may not be recoverable.

StandardUserReport

Standard users normally receive a practical conversation report focused on business review.

Typical sections may include:

Conversation summary information.

Date created.

Last updated date.

Total tokens used.

Estimated conversation cost.

Each message number.

Question submitted.

Responses returned.

This creates a useful printable record of the chat session.

AdministrativeDiagnosticReport

Security Level 1 users may receive an advanced diagnostic and performance report.

This report can include deep technical metrics for evaluation and improvement.

Examples from the diagnostic report include:

Session rows, message rows, summary rows, memory rows, source rows, chunk rows, and keyword rows.

Input, output, and total token totals.

Per-message token consumption.

Keyword success status.

Vector success status.

Selected chunk rankings and weight scores.

Reason selected such as exact keyword match, synonym match, phonetic match, metadata match, vector proximity, authority boost, and recency boost.

Synonym recommendations and phrase weakness findings.

Missing keyword findings for future tuning.

This turns the report into a true optimization tool.

WhyTheDiagnosticReportIsPowerful

The diagnostic report helps administrators continuously improve the AI system.

It can reveal where users asked with different wording than manuals contain.

It can identify missing synonym rows.

It can show when vector relevance was strong but keyword support was weak.

It can help improve metadata, source quality, and ranking logic.

This creates a cycle of ongoing improvement rather than static AI behavior.

ExampleDiagnosticInsight

A user asks about overtime policy.

The report may show that the request was semantically close to the correct manual section but keyword support was weak.

This suggests adding synonyms such as comp time, lieu time, overtime eligibility, or policy phrase mappings.

Future users then receive stronger results.

ExampleWorkflow

Example: A manager wants to review a prior HR conversation.

1. Open Chat History.

2. Enter Any Text = HR.

3. Set date range if needed.

4. Press Search.

5. Review the results grid.

6. Press Select to reopen the prior thread.

7. Continue the conversation inside Chat.

ExampleAdminWorkflow

Example: An administrator wants to evaluate search quality.

1. Select the user.

2. Locate the conversation.

3. Press Run Report.

4. Review keyword findings, synonym candidates, chunk ranking, and token usage.

5. Use the findings to improve manuals, synonyms, or retrieval settings.

OperationalBenefits

The Chat History screen helps organizations:

Reuse prior work.

Track costs.

Audit conversations.

Improve AI performance.

Preserve knowledge.

Reduce repeated effort.

Troubleshooting

If no chats appear, widen the date range or remove filters.

If an older chat is missing, enable Search Archive.

If too many rows appear, use Any Text or dates to narrow results.

If a project should continue, use Select instead of creating a new chat.

If usage appears high, run the report and review token totals.

SecurityAndAccess

Users should only access history permitted by their security rights.

Administrative review rights should be limited to authorized personnel.

Reports may contain prompts, responses, and internal company information.

Handle exported reports appropriately.

Summary

The Chat History screen is the memory vault and management center for prior AI conversations.

It allows users to reopen work, organize sessions, archive old threads, review costs, and generate reports.

For administrators, it also serves as a high-value diagnostic engine for improving the AI platform over time.

400.000 - User Preferences for Chat Instructions

Screen | 2026-05-11 00:00:00 `ChatMemory`

400.000 User Preferences for Chat Instructions

Purpose

The User Preferences for Chat Instructions screen allows each user to personalize how the AI Chat Agent responds to requests.

Instead of forcing every user to receive the same style of answer, this screen allows the platform to send user-specific instruction preferences to the API during processing.

The result is a more useful, more efficient, and more customized chat experience.

This screen is one of the more advanced features in the system because it improves responses without requiring programming changes.

Images

Figure: Chat User Instruction Preferences screen.

WhyThisScreenMatters

Different users often want different kinds of answers even when asking the same question.

One user may want a short direct answer.

Another user may want a detailed explanation with reasoning.

Another user may prefer bullet points.

Another user may want only action steps with no filler.

This screen solves that problem by allowing preferences to be stored once and automatically applied to future requests.

The system becomes more aligned to the individual user over time.

WhatThisScreenReallyIs

This screen is more powerful than it first appears.

It is a preference engine that helps control how AI responses are generated.

It supports user personalization, API instruction injection, rule conflict prevention, response shaping, persistent user behavior memory, and fine tuning without coding.

These capabilities are normally hidden inside advanced AI systems, but here they are available through a business screen.

HowItWorks

When a user submits a request through the Chat screen, the system may gather active preferences

selected on this screen.

Those preferences are converted into structured instruction content and included with the API request.

The AI then reacts not only to the question asked, but also to the user preferences attached to that request.

This creates smarter and more consistent output.

TopGridAvailableDefinitions

The top grid displays available preference definitions that may be selected.

Each row represents a reusable instruction rule that has been created by system administrators.

The Add button places that preference into the user's active list.

Typical columns include:

ID number.

Code name.

Category.

Instruction text.

Exclusion group.

Command name.

Command value.

The instruction text is especially important because it tells the AI how to behave.

BottomGridUserSelections

The bottom grid displays the user's current active preferences.

These are the rules that will normally be considered when future chat requests are processed.

The Delete button removes a preference from the active list.

This allows users to adjust behavior as needs change.

ExamplesOfPreferenceBehavior

A preference may instruct the AI to keep answers brief and direct.

A preference may request bullet point formatting when easier to read.

A preference may request detailed explanations when the user needs deeper understanding.

A preference may ask for steps only when the user wants action-oriented output.

A preference may reduce unnecessary filler or repeated commentary.

Over time, combinations of preferences create a personalized response style.

CommonCategories

Many installations organize preferences into categories.

Examples may include summary mode, detail mode, formatting style, reasoning depth, action style, communication tone, and output structure.

Using categories helps users understand what each rule is intended to control.

ConflictPrevention

The system checks for conflicts before allowing incompatible rules to be activated together.

This is an important control feature.

For example, a preference requesting very short summary output may conflict with a preference requesting full detailed explanation.

A bullet-only rule may conflict with a paragraph-style rule.

When conflicts are detected, the system advises the user and prevents the invalid combination.

This keeps requests clean and avoids confusing the AI.

WhyConflictCheckingIsImportant

Without conflict checking, users could unknowingly send contradictory instructions.

That can reduce quality, create inconsistent formatting, or weaken the usefulness of responses.

The conflict engine helps maintain stable behavior.

This is a professional control layer that many simple AI systems do not have.

PersistentCustomization

Once selected, preferences remain associated with the user until changed.

This means users do not need to restate the same style requests every day.

Instead of repeatedly typing "make this concise" or "use bullet points," the system can remember those preferences.

This saves time and creates consistency.

FineTuningWithoutCoding

One of the strongest benefits of this screen is that AI behavior can be improved without changing program code.

Administrators may add new preference definitions.

Users may activate combinations that suit their work style.

The platform evolves through configuration rather than constant redevelopment.

ExampleWorkflow

Example: A manager wants short practical answers.

1. Open User Preferences for Chat Instructions.

2. Add a brief summary rule.

3. Add a bullet formatting rule.

4. Add an action-step rule if available.

5. Return to Chat.

Future requests now tend to return concise and practical responses.

SecondExample

Example: An analyst wants fuller explanations.

1. Remove brief summary preferences.

2. Add detailed explanation preferences.

3. Add reasoning or examples if available.

4. Return to Chat.

The same AI system now behaves differently for that user.

BusinessValue

This screen increases adoption because users feel the system works in their preferred style.

It reduces repeated prompt wording.

It improves satisfaction.

It creates better output consistency across long-term use.

It also gives administrators a controlled way to shape AI behavior responsibly.

WhyThisMattersForModernAI

Modern AI systems improve significantly when user intent and user preferences are both understood.

Question plus preference often produces better results than question alone.

This screen turns that concept into a practical business tool.

Troubleshooting

If responses are too short, remove aggressive summary preferences.

If responses are too long, add concise summary preferences.

If formatting feels weak, review active style preferences.

If the system reports a conflict, remove one of the competing rules.

If behavior changed unexpectedly, review the bottom active list.

SecurityAndAdministration

Preference definitions are normally managed by authorized administrators.

Users generally select from approved options rather than creating uncontrolled instructions.

This helps maintain governance and response quality.

Summary

The User Preferences for Chat Instructions screen allows the AI platform to adapt to each user without rewriting software.

It combines stored preferences, controlled instruction logic, and conflict checking to produce more useful responses.

Human preferences plus AI instructions create customized results, and this screen makes that possible in a practical business environment.

500.000 - Search and List Documents

Screen | 2026-05-12 00:00:00 SN_DocList

500.000 Search and List Documents

Purpose

The Search and List Documents screen is used to locate documents that have been loaded into the AI document system.

This screen gives users a controlled way to search knowledge entries, emails, PDF files, DOCX files, letters, memos, RTF files, spreadsheets, and program documents.

The screen is used when a user needs to find a document record, review document identity information, or open a stored file for download.

Images

Figure: Search and List Documents screen.

WhyThisScreenMatters

The AI system depends on organized document records.

Each document record identifies what was loaded, where it came from, how it is classified, and whether a stored file is available.

This screen allows users to inspect those records without searching directly through database tables.

It also allows users to locate supporting files that may have been uploaded as part of the document ingestion process.

SearchArea

The top search panel is used to filter document records.

Doc Type limits results to a selected document classification.

Any Text searches common document identity fields such as source name, display name, document description, file name, book name, chapter name, section name, subject line, sender line, and recipient line.

From Date limits results to documents on or after the selected date.

To Date limits results through the selected ending date.

Search runs the selected search criteria.

Cancel resets the search fields and returns the list to the default document view.

DocumentTypeFilter

The Doc Type dropdown is used to narrow the list to a specific kind of document.

Typical values include KNOWLEDGE_ENTRY, EMAIL_THREAD, PDF_DOCUMENT, DOCX_DOCUMENT, LETTER_MEMO, RTF_DOCUMENT, XLSX_DOCUMENT, and PROGRAM_DOCUMENT.

Screen documents and procedure documents are excluded from this screen because they are managed through their own controlled screen and procedure areas.

AnyTextSearch

The Any Text field is useful when the user does not know the exact document type or date.

The search may match source names, display names, descriptions, original file names, stored file names, book names, chapter names, section names, subject lines, sender lines, or recipient lines.

This makes the screen practical for locating documents from partial business terms, file names, manual references, email subjects, or program names.

DateRangeSearch

The From Date and To Date fields limit the search by document date.

Both dates should be entered when using date filtering.

If only one date is entered, the search may require the missing date before processing.

Date range filtering is useful when searching for recently loaded documents, older correspondence, dated memos, or documents from a known business period.

ResultsGrid

The lower grid displays the matching document records.

Typical columns include action, document type, source name, display name, description, file name, directory, document date, book, chapter, section, and subject.

Long values are kept on one line so the grid remains readable.

When text is too long for a cell, the user may hover over the value to view the full text.

DownloadButton

If a document record has both a stored directory and stored file name, the grid displays a Download PDF button in the action column.

The button opens the stored file through the document viewer.

After the user returns from the document viewer, the screen keeps the prior search fields and list results.

This allows the user to inspect multiple documents without rebuilding the search each time.

StoredFileBehavior

Some document records represent knowledge or metadata only and may not have a stored file.

When no stored file is available, the action column may be blank.

When a stored file exists, the file can be opened through the download action.

The directory and file name shown in the grid help verify which stored file is attached to the document record.

ExampleWorkflow

Example: A user wants to find a PDF document about payroll.

1. Open Search and List Documents.

2. Select PDF_DOCUMENT from Doc Type.

3. Enter payroll in Any Text.

4. Enter a From Date and To Date if needed.

5. Press Search.

6. Review the grid results.

7. Press Download PDF on the matching row when a stored file is available.

ExampleEmailWorkflow

Example: A user wants to locate an email thread.

1. Select EMAIL_THREAD from Doc Type.

2. Enter part of the subject, sender, recipient, or topic in Any Text.

3. Press Search.

4. Review the source name, display name, subject, sender, and recipient information.

5. Open the stored file if one is available.

ExampleProgramWorkflow

Example: A user wants to locate a program document.

1. Select PROGRAM_DOCUMENT from Doc Type.

2. Enter the program name or related description in Any Text.

3. Press Search.

4. Review the grid for the matching source name or display name.

5. Use the download action if a stored file is attached.

OperationalBenefits

The Search and List Documents screen helps users locate source material quickly.

It reduces the need for direct database access.

It helps confirm whether documents were loaded with the correct classification.

It supports document review, troubleshooting, audit activity, and content verification.

It also gives users a direct path from a document record to the stored file when available.

Troubleshooting

If no records appear, remove some filters or widen the date range.

If the expected document is missing, try searching by a partial file name, source name, display name, or subject line.

If the Download PDF button does not appear, the document record may not have both a stored directory and stored file name.

If too many records appear, select a specific Doc Type or add more specific Any Text criteria.

If a returned file does not appear to match the expected document, review the source name, display name, stored file name, and directory shown in the grid.

SecurityAndAccess

Users should only access document records permitted by their security rights.

Downloaded files may contain internal business information.

Users should handle downloaded files according to company policy.

Administrative users should review document classification and file storage values when investigating ingestion or retrieval issues.

Summary

The Search and List Documents screen is the document lookup center for the AI document system.

It allows users to filter records by document type, text, and date range.

It displays key document identity fields in a readable grid.

When a stored file exists, the screen provides a direct download action through the document viewer.

800.000 - Procedures for Chat Agent

100.000 - Chat Agent Step by Step

Procedure | 2026-05-11 17:18:14 Procedure for Using Chat Agent / Chat Agent Procedures

100.000 Chat Agent Step by Step

Procedure Name

Procedure for Using Chat Agent

Book Name

Operating Manual

Procedure Category

Chat Agent Procedures

Purpose

This procedure explains how to use the AI Chat Agent as a practical day-to-day business tool.

The AI Chat Agent is the central working screen of the Corporate Intelligence System and is designed to help users ask questions in plain English and receive intelligent responses based on company manuals, procedures, uploaded documents, and optional public information.

Unlike ordinary chat systems, this platform preserves conversation history, searches private company knowledge, optionally combines public information, provides downloadable supporting documents, and maintains continuity across long work sessions.

This procedure presents a complete step-by-step guide for creating chats, continuing existing conversations, selecting business domains, controlling search behavior, navigating prior messages, and using command-based diagnostic functions.

General Information

The AI Chat Agent can be used for research, policy interpretation, drafting letters, preparing procedures, analyzing business issues, and answering operational questions.

Each conversation is stored as a separate chat thread with its own name, history, running summary, token totals, and cost statistics.

Users may maintain multiple chat threads for different subjects such as Accounting, Human Resources, Payroll, Leasing, Property Management, Information Technology, and Legal matters.

The system remembers prior discussion within each chat so that work can continue over many days or weeks without repeating all earlier information.

Where To Find

Open the main menu and select AI Chat Agent from the Artificial Intelligence or Chat menu group.

The Chat screen will open and display the current active conversation.

Procedure Detail

Step 1 - Open the AI Chat Agent.

Select AI Chat Agent from the menu. The screen displays the active chat name at the top, the running conversation cost, a left control pane, a central conversation area, a request entry area at the bottom, and a right-side message navigation panel.

Step 2 - Continue an Existing Chat.

If you want to continue prior work, review the My Chats list in the left pane and select the desired chat. The selected conversation becomes the active chat and all prior messages remain available for review and continuation.

Step 3 - Create a New Chat.

Press the New Chat button. Enter a descriptive name such as Payroll Tax Research, Employee Handbook Development, Lease Review, or Vendor Evaluation. A new conversation thread is created and becomes the active chat.

Step 4 - Rename the Current Chat.

If the subject of the conversation changes, press Rename Chat and enter a more meaningful title. Clear naming helps organize future searches in Chat History.

Step 5 - Select a Business Domain.

Use the Business Domain dropdown to select the area most closely related to your request, such as Accounting, HR, Payroll, Legal, IT, Leasing, or Operations.

The selected domain provides additional context that helps the system favor documents and terminology associated with that subject area.

For example, selecting HR increases the likelihood that terms such as overtime, benefits, leave, and employee policies will be matched against Human Resources manuals.

Step 6 - Enter Your Question or Request.

Type your request in plain English in the request box at the bottom of the screen.

Examples include:

What is our overtime policy?

Draft a warning letter for excessive absenteeism.

Explain how CAM reconciliations are performed.

Create a tenant onboarding checklist.

Step 7 - Choose Response Length.

Select Summary when you want a concise answer.

Select Detail by leaving Summary off when you want a more complete explanation.

Summary is useful for quick answers, while Detail is preferred for research, procedures, and policy analysis.

Step 8 - Choose Output Format.

Select Copy Box when you want the response in a structured format that can be copied directly into emails, manuals, procedures, or reports.

Leave Copy Box off to receive Stream output, which displays the response as normal readable text.

Use Copy Box when the output will be reused. Use Stream when the response will primarily be read on screen.

Step 9 - Select Search Scope.

Select DB Search Only to limit responses to internal company knowledge such as manuals, procedures, screen documents, uploaded files, and other organizational information.

Select DB and Public Search to combine company knowledge with general public information from outside sources.

Use DB Search Only when internal policies and procedures are the primary source of truth. Use DB and Public Search when additional outside context may be helpful.

Step 10 - Enable Use Domain.

When a Business Domain has been selected, turn on Use Domain to apply the selected domain as an additional retrieval hint.

This improves ranking by favoring documents and terminology associated with the chosen subject area.

Step 11 - Enable Show Files.

Turn on Show Files when you want the system to display links to supporting documents used in the response.

These files may include manuals, procedures, PDFs, Word documents, spreadsheets, and other uploaded content.

Opening the source files allows you to verify the answer against the original material.

Step 12 - Send the Request.

Press Send. The system extracts keywords, searches relevant content, selects supporting evidence, builds the final AI request, and returns one or more responses based on the selected options.

Step 13 - Review the Response.

The center conversation window displays the returned answer.

Depending on the selected options, the response may include DB Stream Response, Public Stream Response, DB Copy Box, Public Copy Box, and supporting file links.

Step 14 - Download Supporting Files.

When Show Files is enabled, file links may appear in the left pane or response area. Select a file to open or download the original source document.

Step 15 - Navigate with Message Numbers.

The right-side panel lists message numbers for the active conversation. Select any number to move directly to that request and response without manually scrolling.

Step 16 - Use Command Navigation.

The command area allows local navigation and diagnostic functions. Select a command, enter a message number when required, and press Command.

Common navigation commands include GO TO LINE, TOP, BOTTOM, and CURRENT.

GO TO LINE moves directly to a selected message number.

TOP moves to the earliest messages in the conversation.

BOTTOM moves to the most recent messages.

CURRENT refreshes the display at the latest point in the active chat.

Step 17 - Review Conversation Summary.

Use SHOW SUMMARY to display the internal running summary that preserves important facts, decisions, and objectives from the conversation.

Step 18 - Review Cost Information.

Use SHOW COSTS to display token totals and estimated conversation cost for the current chat.

Step 19 - Review Timing Information.

Use SHOW TIMINGS to display how long each processing stage required.

Step 20 - Review Statistics.

Use SHOW STATS to display additional diagnostic and operational information when available.

Step 21 - Continue the Conversation.

Enter follow-up questions to refine, expand, or redirect the discussion. The system preserves prior context and continues building on earlier work.

Step 22 - Return Later.

All chat threads are stored automatically. You may leave the system and return later to continue the same conversation from the Chat History screen or the My Chats list.

Examples

A Human Resources manager selects the HR business domain, enables DB Search Only, turns on Show Files, and asks, What is our overtime policy? The system returns an answer based on internal manuals and displays supporting policy documents for review.

An accountant creates a new chat named Payroll Tax Research and uses Copy Box to generate content that can be copied directly into procedures and reports.

Troubleshooting

If responses appear too short, turn off Summary.

If you want output that can be copied directly into documents, enable Copy Box.

If no supporting documents are shown, enable Show Files.

If the answer appears too general, select the appropriate Business Domain and enable Use Domain.

If you want only company information, use DB Search Only.

If you need additional outside information, use DB and Public Search.

If you cannot locate an earlier response, use the right-side message numbers or the GO TO LINE command.

200.000 - Your Chat History

Procedure | 2026-05-11 17:15:35 Chat History for the Average User / Chat Agent Procedures

200.000 Your Chat History

Procedure Name

Chat History for the Average User

Book Name

Operating Manual

Procedure Category

Chat Agent Procedures

Purpose

This procedure explains how to use the Chat History screen to review prior conversations, reopen earlier chats, download complete reports, archive finished work, and delete conversations that are no longer needed.

The Chat History screen is one of the most important features of the Corporate Intelligence System because it transforms AI conversations into permanent business assets rather than temporary exchanges.

Unlike many public chat systems, this platform stores each conversation in the database and allows the user to generate a complete printable report of any chat at any time.

This means that research, policy analysis, procedures, letters, and business decisions can be preserved, reviewed, printed, and shared whenever necessary.

General Information

Every chat created in the AI Chat Agent is automatically saved as a separate conversation.

Each conversation contains the chat name, all questions and responses, token usage, estimated cost, dates, and supporting information.

Users may maintain hundreds or even thousands of conversations organized by subject and return to them at any time.

Examples include HR investigations, accounting research, payroll questions, leasing analysis, legal studies, and manual development projects.

The Chat History screen provides a central location to search, review, organize, and manage these conversations.

Where To Find

Open the main menu and select Chat History from the Artificial Intelligence or Chat menu group.

The Chat History screen will display your existing conversations.

Procedure Detail

Step 1 - Open the Chat History Screen.

Select Chat History from the menu. The screen displays search controls and a results grid containing your saved conversations.

Step 2 - Review Your Existing Chats.

The results grid lists each conversation along with important information such as Chat Name, Start Date, Last Updated Date, Input Tokens, Output Tokens, and Total Tokens.

This information helps you identify the correct conversation and understand the amount of work performed in that thread.

Step 3 - Search for Specific Conversations.

Use the Any Text field to search by words contained in the chat name.

For example, entering Payroll will locate chats related to payroll topics.

You may also enter From Date and To Date values to limit the search to a specific time period.

Press Search to display matching conversations.

Step 4 - Include Archived Chats.

Select Search Archive when you want to include archived conversations in the search results.

Archived chats are preserved in the database but hidden from the normal active list.

Step 5 - Select a Conversation to Continue.

Press the Select button next to the desired chat.

The selected conversation becomes the active chat and the system returns to the AI Chat Agent screen.

You may immediately continue asking questions in the same thread with full access to the prior conversation history.

Step 6 - Generate a Complete Chat Report.

Press the Run Report button to create a full report of the selected conversation.

This report includes the conversation summary, all user requests, all responses, dates, token usage, and estimated costs.

Unlike many public AI systems, this platform allows you to download a permanent report of any chat.

This report can be printed, saved as a PDF, attached to project files, or shared with coworkers and management.

Step 7 - Review the Chat Report.

The report provides a complete chronological record of the conversation.

It serves as a formal work paper documenting the research performed, the questions asked, and the conclusions returned by the system.

This makes the AI Chat Agent suitable for serious business and professional use.

Step 8 - Archive Completed Chats.

Press the Archive button when a project is complete but may need to be referenced later.

Archived chats are removed from the normal active list while remaining fully available for future retrieval.

Examples include completed investigations, finalized procedures, and finished research projects.

Step 9 - Search Archived Conversations Later.

When you need to review archived work, enable Search Archive and rerun your search.

The archived conversations will appear and can be selected or reported exactly like active chats.

Step 10 - Delete Unneeded Conversations.

Press the Delete button to permanently remove a conversation.

Delete is typically used for test chats, duplicate conversations, and temporary work that is no longer needed.

Once deleted, the conversation and its history may not be recoverable.

Step 11 - Organize Chats by Meaningful Names.

Assign descriptive names to conversations so they can be found easily in the future.

Examples include Employee Handbook Revision, Payroll Tax Research, Lease CAM Reconciliation, and Vendor Comparison Study.

Step 12 - Use Reports as Permanent Work Papers.

Downloaded reports may be stored in project files as evidence of the research performed.

This is particularly valuable for compliance work, policy studies, audit support, training materials, and management documentation.

Step 13 - Return to Work at Any Time.

Because every conversation is saved, you may leave the system and return days, weeks, or months later to continue exactly where you left off.

Examples

A Human Resources manager searches for all chats containing the word Overtime, selects a prior conversation, and continues refining the company policy.

An accountant runs a report for a payroll tax research chat and saves the PDF as part of the project documentation.

A project manager archives a completed vendor evaluation so the conversation remains available but no longer appears in the active list.

Troubleshooting

If you cannot find a conversation, enter part of the chat name in Any Text and press Search.

If an older conversation does not appear, enable Search Archive and search again.

If you want a permanent record of your work, use Run Report before archiving or deleting the conversation.

If the active chat list becomes too large, archive completed projects to keep the list organized.

If you accidentally create duplicate or test chats, delete the unnecessary conversations.

300.000 - Procedure for Chat Performance Evaluation

Procedure | 2026-05-11 17:16:53 Performance Evaluation / Chat Agent Procedures

300.000 Procedure for Chat Performance Evaluation

Procedure Name

Performance Evaluation

Book Name

Operating Manual

Procedure Category

Chat Agent Procedures

Purpose

This procedure explains how authorized users can evaluate the performance of the AI Chat Agent by generating and analyzing the Chat Performance Report.

The objective of this procedure is to show how to identify why a response was strong or weak, determine the underlying causes of any deficiencies, and take corrective action to improve future results.

The performance evaluation process transforms the AI Chat Agent from a simple question-and-answer tool into a continuously improving corporate intelligence system.

General Information

The Chat Performance Report is a detailed diagnostic report that analyzes how the system interpreted a request, what information was selected, how the final response was generated, and what opportunities exist to improve performance.

The report includes conversation statistics, token usage, keyword and synonym diagnostics, message-by-message evaluations, selected chunk rankings, and complete question and response blocks.

The report does not disclose proprietary ranking formulas or internal weighting algorithms. Instead, it presents practical operational information that can be used to improve system behavior without exposing confidential implementation details.

The report is particularly valuable when a response appears incomplete, inaccurate, overly general, or fails to use the most appropriate terminology.

Where To Find

Open the main menu and select Chat History.

Locate the desired conversation and press Run Report.

Administrative users with appropriate security may select another User ID and analyze conversations created by other users for training, support, and system improvement purposes.

Procedure Detail

Step 1 - Open Chat History.

Select Chat History from the menu.

Step 2 - Select a User.

If you are an authorized administrator, use the User ID selection field to choose the employee whose conversation you want to analyze. Standard users normally review only their own conversations.

Step 3 - Locate the Conversation.

Use the search fields to locate the desired chat.

Step 4 - Generate the Performance Report.

Press Run Report. The system creates a detailed PDF report similar to the Chat Performance Evaluator report provided in the system documentation and sample report :contentReference[oaicite:0]{index=0}.

Step 5 - Review the Chat Session Summary.

The opening pages display conversation identification, dates, token totals, and counts of loaded records such as messages, summaries, sources, documents, chunks, and chunk keywords.

Cause and Effect: If chunk and keyword counts are very low, the system had little internal information to search, which can lead to weak or generic responses.

Corrective Action: Ingest additional manuals, procedures, PDFs, Word documents, and other knowledge sources.

Step 6 - Review the Keyword and Synonym Diagnostic Summary.

This section reports the number of messages evaluated, synonym candidate rows, strong candidate rows, missing keyword findings, and phrase weakness findings.

Cause and Effect: High Missing Keyword Findings indicate that users are asking with terms that do not exist in the indexed knowledge base. High Phrase Weakness Findings indicate that important multi-word expressions were not stored as searchable phrases.

Corrective Action: Add new keywords, create synonym mappings, and define phrase synonyms such as overtime policy, comp time, maternity leave, and company policy.

Step 7 - Review the Message Evaluation Summary.

This table summarizes each message and shows Request Keywords, Selected Chunks, Keyword Rows, Chunk Findings, and Message Findings.

Cause and Effect: A low Selected Chunks count suggests that little relevant information was found. High Message Findings indicate multiple issues were detected for that request.

Corrective Action: Improve document coverage, metadata, synonyms, and phrase definitions for the affected subject area.

Step 8 - Review Synonym Recommendations.

This section lists request terms, candidate manual terms, reasons for the recommendation, and suggested actions.

Cause and Effect: When users ask with wording different from the manuals, relevant content may be overlooked or ranked lower.

Corrective Action: Add the recommended synonyms, abbreviations, misspellings, and phrase mappings to the synonym database.

Example: If users ask for comp time while manuals use lieu time, creating a synonym relationship between these terms will improve future retrieval.

Step 9 - Review Question and Result Blocks.

Each message includes the original request, the final response, DB Stream Response, Public Stream Response when applicable, business domain, and token counts.

Cause and Effect: If the public response is accurate but the DB response is weak, internal manuals may be incomplete or poorly indexed.

Corrective Action: Expand internal documentation and re-ingest affected content.

Step 10 - Review Selected Chunk Summary.

This section lists the top selected chunks and shows rank, Chunk ID, Document ID, Total Weight, Keyword Score, Vector Score, and narrative selection reasons such as exact keyword match, synonym match, phonetic match, metadata match, vector proximity, authority boost, and recency boost.

Cause and Effect: If the top-ranked chunks are unrelated to the question, the search terms, metadata, or synonyms are insufficient.

Corrective Action: Improve metadata, add synonyms, refine business domains, and verify that relevant documents are indexed.

Step 11 - Analyze Keyword Status and Vector Status.

Each message displays RequestKeywordStatus and RequestVectorStatus.

Cause and Effect: If either status is not SUCCESS, part of the retrieval process did not complete properly.

Corrective Action: Review system logs and correct the underlying processing issue before relying on the response.

Step 12 - Review Token Usage and Cost.

The report shows RoundTripInputTokens, RoundTripOutputTokens, and RoundTripTotalTokens for each message, along with conversation totals.

Cause and Effect: Excessively high input tokens increase cost and may slow response time.

Corrective Action: Reduce unnecessary context, shorten overly large summaries, and optimize selected chunk counts.

Step 13 - Compare Multiple Messages.

Evaluate whether the same subject improves after synonyms or documents are added.

Cause and Effect: Improved rankings and fewer findings confirm that corrective actions were effective.

Corrective Action: Continue refining the knowledge base using report feedback.

Step 14 - Implement Corrections.

Based on the report, add missing documents, update metadata, create synonyms, improve phrase coverage, and regenerate the search index when required.

Step 15 - Re-Test the Original Question.

Ask the same question again in the Chat Agent and generate a new performance report.

Step 16 - Verify Improvement.

Look for stronger chunk rankings, fewer findings, better responses, and reduced diagnostic issues.

Examples

A user asks, What is my company's overtime policy? The report identifies missing phrase support for overtime policy and comp time. After synonyms and phrase mappings are added, the next report shows stronger rankings and more accurate responses.

A payroll administrator discovers that selected chunks come from unrelated documents. After updating metadata and assigning the Payroll business domain, the system begins selecting the correct payroll procedures.

Troubleshooting

If the report shows many Missing Keyword Findings, add keywords and synonyms that match the language users naturally use.

If Phrase Weakness Findings are high, define important multi-word expressions as phrases.

If Selected Chunks are unrelated, improve metadata and verify document ingestion.

If RequestKeywordStatus or RequestVectorStatus is not SUCCESS, correct the processing problem before evaluating response quality.

If token counts are unusually high, review conversation summaries and selected context for unnecessary content.

Summary

The Chat Performance Report provides a structured method for understanding how the AI Chat Agent interpreted a request, selected supporting information, and produced a final response.

By analyzing cause and effect and applying targeted corrective actions, administrators can continuously improve terminology alignment, document quality, and retrieval accuracy.

This disciplined process allows the Corporate Intelligence System to become more accurate and more valuable with every evaluation cycle.

1000.000 - Security Management

10.000 - Introduction to Security Management

Screen | 2026-05-11 00:00:00 Intro Secuirty

010.000 Introduction to Security Management

Purpose

The purpose of system security management is to control who may enter the system, what functions they may use, and what data they are allowed to view or update.

Security is one of the most important parts of the application because it protects programs, data, administration functions, AI controls, utilities, and all other sensitive system features.

A user should never be allowed to see or change information unless that authority has been deliberately assigned.

The security design in this system is structured, layered, and enforced throughout the platform.

TwoLevelsOfSecurity

This system uses two distinct but related layers of security.

The first layer controls access to functions and programs.

The second layer controls access to data used by the AI Chat Agent.

Both layers are required to properly secure a modern AI-driven system.

ProgramAndFunctionSecurity

Program security determines which screens, menus, and functions a user is allowed to access.

This is controlled through the Security Group table and the User table.

Each user is assigned access levels of N (No access), R (Read access), or W (Write access) for each security group.

Programs check these values before allowing entry or updates.

This ensures that users can only open and modify functions that they are authorized to use.

SecurityLevels

In addition to group access, each user is assigned a Security Level from 1 through 5.

Level 1 represents the highest authority.

Level 5 represents the lowest authority.

Programs may require a minimum security level in addition to group access.

This provides an additional layer of protection for sensitive operations.

AIDataSecurityLayer

The AI Chat Agent introduces a second and equally important layer of security.

This layer controls what data the AI is allowed to use when generating responses.

This is not controlled at the program level.

It is controlled at the data level during the search and retrieval process.

ChunkLevelSecurity

All knowledge used by the AI is stored and processed in units called chunks.

Each chunk may be assigned a WorkType classification.

This WorkType determines which users are allowed to access that piece of information.

The system enforces this rule during chunk selection before any response is generated.

WorkTypeSecurityModel

The WorkType field in the User record defines the user's data access level.

The WorkType assigned to a chunk defines who may view that chunk.

The system enforces the following rules:

ALL means all users may access the data.

ADMIN means only administrative users may access the data.

PRO means administrative and professional users may access the data.

EMPLOYEE means employee, professional, and administrative users may access the data.

HowThisWorksInChat

When a user submits a request to the AI Chat Agent, the system performs a search across available knowledge.

Before selecting any chunks to support the response, the system filters those chunks based on WorkType security.

If the user is not authorized to view a chunk, that chunk is excluded from consideration.

This happens automatically and is enforced before the AI response is generated.

WhyThisIsImportant

This design ensures that the AI cannot expose restricted information.

Even if the correct answer exists in the system, it will not be used if the user does not have the authority to see it.

This protects sensitive data such as administrative procedures, internal policies, financial data, legal content, and restricted operational information.

SecurityAtRetrievalTime

Unlike traditional systems where security is enforced only when opening a screen, this system enforces security during data retrieval.

This is especially important for AI systems, because responses are built dynamically from many possible data sources.

The system must ensure that only authorized data is used in constructing the response.

CombinedSecurityModel

The platform therefore uses a combined security model.

Program security controls what the user can access.

Data security controls what the AI can use to answer.

Both layers must be satisfied for the system to operate correctly.

Example

An employee may have access to the Chat screen and be able to ask questions.

However, if a particular administrative procedure is marked as ADMIN only, the AI will not use that data in the response.

The employee will receive an answer based only on the information they are authorized to see.

WhyThisIsEnterpriseGradeSecurity

This dual-layer approach is a key part of enterprise AI system design.

It prevents accidental exposure of restricted knowledge.

It allows organizations to safely deploy AI across different user roles.

It ensures that AI responses respect the same security rules as the rest of the system.

Summary

The system enforces security at both the function level and the data level.

Users can only access programs they are authorized to use.

The AI can only use data the user is authorized to view.

This combined model protects the system while still allowing powerful AI-driven functionality.

50.000 - Managing User Security Access

Screen | 2026-05-11 00:00:00 SN_Users

050.000 Managing User Security Access

Purpose

Use this screen to create, maintain, update, and remove users who are allowed to log on to the system.

This is one of the most important administrative screens because it controls who can enter the platform and what each user is allowed to do after logon.

User Security Access determines whether a person can view information only, update data, administer settings, maintain AI controls, run backups, or manage other users.

Incorrect security setup can expose sensitive functions or block users from work they need to perform.

This screen should be restricted to highly trusted administrators only.

SystemSecurityOverview

The system uses layered security.

Each user has:

A User ID for logon.

A Password.

Name information.

A Work Type.

A Security Level from 1 to 5.

Forty separate security groups.

Each security group can be assigned:

N = No Access

R = Read Only Access

W = Write / Update Access

This creates precise control over what each user may see or change.

WhereToFind

Main Menu to Utilities to Maintain Users.

Images

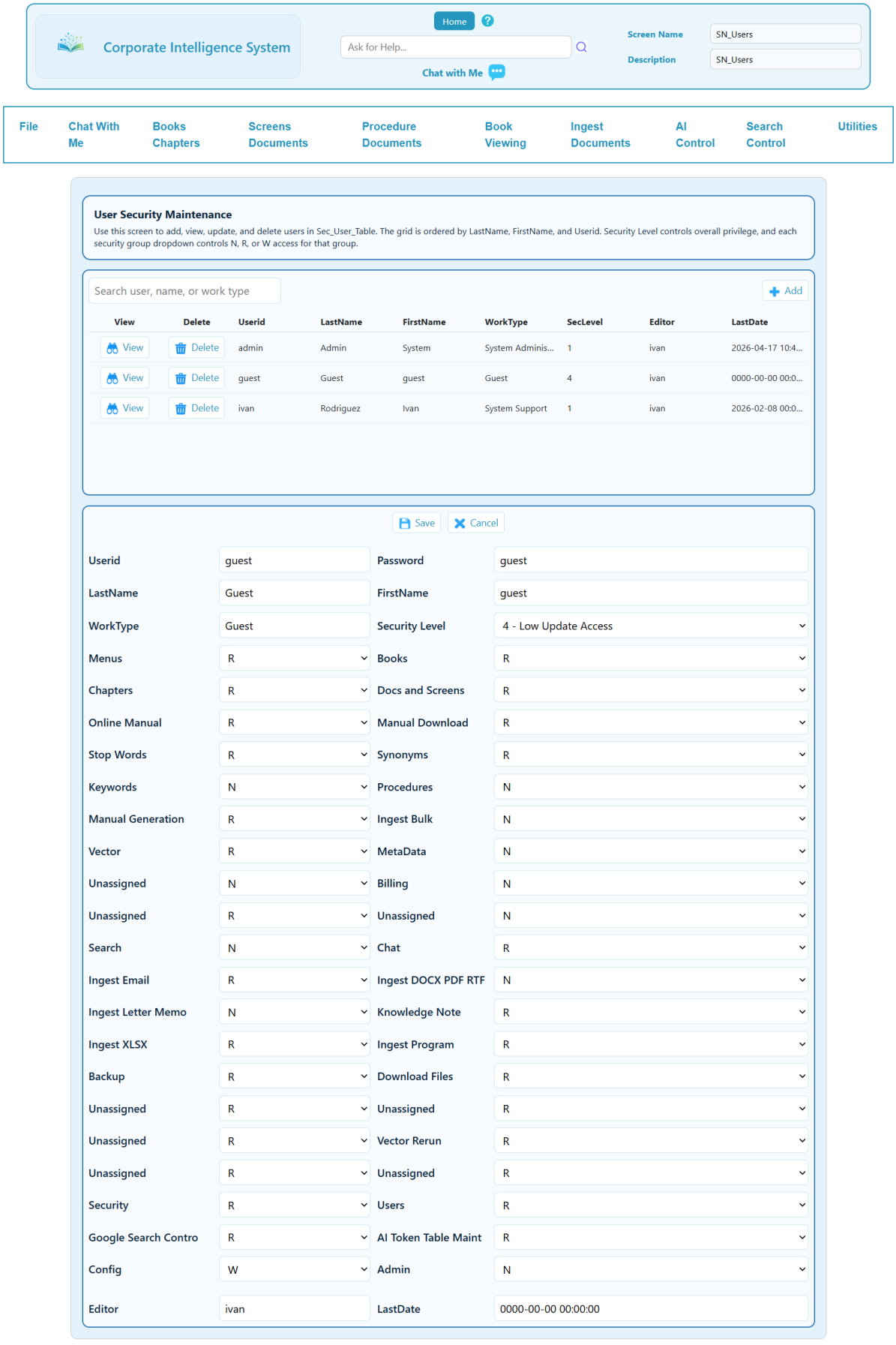

Corporate Intelligence System
Home
Ask for Help...
Chat with Me
Screen Name
SN_Users
Description
SN_Users
File
Chat With Me
Books Chapters
Screens Documents
Procedure Documents
Book Viewing
Ingest Documents
AI Control
Search Control
Utilities
User Security Maintenance
Use this screen to add, view, update, and delete users in Sec_User_Table. The grid is ordered by LastName, FirstName, and Userid. Security Level controls overall privilege, and each security group dropdown controls N, R, or W access for that group.
Search user, name, or work type
Add
View Delete admin Admin System System Adminis... 1 ivan 2026-04-17 10:4...
View Delete guest Guest guest Guest 4 ivan 0000-00-00 00:0...
View Delete ivan Rodriguez Ivan System Support 1 ivan 2026-02-08 00:0...
Save
Cancel
Userid guest
Password guest
LastName Guest
FirstName guest
WorkType Guest
Security Level 4 - Low Update Access
Menus R
Books R
Chapters R
Docs and Screens R
Online Manual R
Manual Download R
Stop Words R
Synonyms R
Keywords N
Procedures N
Manual Generation R
Ingest Bulk N
Vector R
MetaData N
Unassigned N
Billing N
Unassigned R
Unassigned N
Search N
Chat R
Ingest Email R
Ingest DOCX PDF RTF N
Ingest Letter Memo N
Knowledge Note R
Ingest XLSX R
Ingest Program R
Backup R
Download Files R
Unassigned R
Unassigned R
Unassigned R
Vector Rerun R
Unassigned R
Unassigned R
Security R
Users R
Google Search Contro R
AI Token Table Maint R
Config W
Admin N
Editor ivan
LastDate 0000-00-00 00:00:00

Figure: User security maintenance screen.

HowSecurityWorks

The system checks both Security Level and Group Access.

Security Level controls privilege ranking.

Group Access controls function rights.

Work Type controls AI Chat data visibility.

All three controls may affect what a user can do or see.

Example:

A user may have Read rights to a module but still fail access if their Security Level is too low.

Likewise, a high-level user with Group Access = N cannot open that module.

A user may also have access to AI Chat but still be limited to only the searchable data allowed for their Work Type.

SecurityLevelsExplained

Security Levels run from 1 through 5.

Level 1 is highest privilege.

Level 5 is lowest normal privilege.

Typical usage:

1 = System Owner / Master Administrator

2 = Senior Administrator

3 = Manager / Supervisor

4 = Advanced User

5 = Standard User

The exact business meaning may vary by organization.

WorkTypeAndDataVisibility

Work Type defines the type of user and directly controls what information they are allowed to see when using the AI Chat system.

The system uses three primary Work Types:

ADMIN - Full access to all searchable data in the system.

Administrators can see all documents, all data chunks, and all AI responses regardless of classification.

This includes sensitive administrative, configuration, and restricted business content.

PRO - Professional or departmental access.

Pro users can access all general and employee-level information, plus documents intended for trained or departmental staff.

However, Pro users do not see administrative-only content that is restricted to Admin users.

EMPLOYEE - General user access.

Employee users are limited to standard operational content and general-use materials.

They cannot see professional-level or administrative-level documents.

The system enforces this using document and data classification.

All searchable content is stored as small segments called **chunks**.

Each chunk is assigned a visibility classification of:

EMPLOYEE

PRO

ADMIN

ALL

When a user submits a question, the AI search engine only retrieves chunks that match the user's Work Type.

Example:

If a document is marked PRO, it is intended for trained staff such as HR, accounting, management, or other professional users.

Employees will not see this content.

If a document is marked EMPLOYEE, it is general-purpose information such as policies, procedures, employee guides, or common HR questions.

This content is visible to Employee, Pro, and Admin users.

If a document is marked ADMIN, it is restricted to administrators only.

Only Admin users can retrieve or view this information.

If a document is marked ALL, it is visible to every user regardless of Work Type.

This layered visibility ensures that users only see information appropriate to their role while still allowing powerful AI-driven search capabilities.

Incorrect Work Type assignments can either expose restricted data or prevent users from accessing information they need.

SecurityGroupsExplained

The system contains 40 security groups.

Each group usually represents a module, subsystem, or protected function.

Examples may include:

User maintenance.

Backups.

AI configuration.

Search administration.

Book maintenance.

Document ingestion.

Financial screens.

Reports.

Each group uses N, R, or W access.

N means the user cannot use that area.

R means the user may view or run read-only functions.

W means the user may add, update, delete, or administer that area.

MainFunctions

Add creates a new user.

View opens an existing user record.

Save updates an existing user or stores a new user.

Delete removes a user.

Cancel clears the edit area.

Search filters the user list by User ID, First Name, Last Name, or Work Type.

FieldsOrSettings

User ID is the logon name used to enter the system.

It must be unique.

Once created, it normally should not be changed.

Password is the logon password for the user.

Only authorized administrators should change passwords.

First Name stores the user's first name.

Last Name stores the user's last name.

Work Type stores the user classification used by AI Chat visibility rules.

Valid Work Type values are ADMIN, PRO, and EMPLOYEE.

ADMIN users can search all allowed system content, including administrative and restricted content.

PRO users can search employee-level content and professional or departmental content, but not administrator-only content.

EMPLOYEE users can search only employee-level or all-user content.

Security Level stores privilege rank from 1 to 5.

SecGroup1 to SecGroup40 store access rights for each protected system group.

Editor stores who last changed the record.

Last Date stores when the record was last updated.

HowToAddUser

Select Add.

Enter a new unique User ID.

Enter a password.

Enter first and last name.

Select Work Type.

Select Security Level.

Assign each needed security group as N, R, or W.

Press Save.

The new user can then log on with the assigned credentials.

HowToModifyUser

Use Search to locate the user.

Select View.

Adjust password, names, Work Type, level, or security groups.

Press Save.

User ID normally remains fixed in save mode.

HowToDisableUser

Preferred method is to remove rights instead of deleting immediately.

Change all groups to N.

Or assign minimal rights only.

Or change password and notify management.

Delete should be used carefully if historical audit value exists.

Examples

Example 1: Standard Employee

Work Type = EMPLOYEE

Security Level 5

Books = R

Reports = R

AI Chat = W

User Maintenance = N

Backup = N

Meaning: can use normal functions and ask AI Chat questions, but only receives employee-level or all-user information.

Example 2: Department Professional

Work Type = PRO

Security Level 3

Reports = W

Books = W

AI Chat = W

User Maintenance = N

Meaning: stronger departmental rights and access to professional-level AI Chat content without full

admin-only content.

Example 3: System Administrator

Work Type = ADMIN

Security Level 1

Most groups = W

Meaning: full operational control and access to all searchable AI Chat content.

GoodSecurityPractices

Use least privilege.

Grant only rights the user needs.

Review old users regularly.

Disable departed employees quickly.

Separate ordinary users from administrators.

Use strong passwords.

Limit write access on sensitive screens.

Keep only a few Level 1 administrators.

Assign Work Type carefully because it affects AI Chat data visibility.

RulesAndValidations

User ID is required.

Password is required.

First Name is required.

Last Name is required.

Work Type is required.

Work Type must be ADMIN, PRO, or EMPLOYEE.

Security Level must be 1, 2, 3, 4, or 5.

Each security group must be N, R, or W.

Duplicate User IDs are not allowed when adding a new user.

DownstreamEffects

Changes on this screen affect future logons immediately or on next session refresh.

Raising access may expose new menus and functions.

Reducing access may hide menus or deny entry.

Changing Work Type may change which AI Chat documents and chunks the user can retrieve.

Deleting a user removes future logon ability.

Bad security settings can create major operational risk.

Troubleshooting

If user cannot log on, verify User ID and Password.

If user can log on but cannot open a screen, verify the correct security group and level.

If user can use AI Chat but does not receive expected information, verify the user's Work Type and the document or chunk classification.

If Save fails, verify required fields are entered.

If Add fails, the User ID may already exist.

If a user sees too many features, reduce group rights.

If a user sees restricted AI Chat content, review Work Type and content classification.

If a user sees too little information in AI Chat, verify that the content is classified for EMPLOYEE, PRO, ADMIN, or ALL correctly.

SecurityAndAccess

This screen itself is highly restricted.

Only trusted administrators should maintain user security.

Unauthorized changes here can affect the entire system.

User maintenance is one of the most sensitive functions in the platform.

1500.000 - System Utilities

60.000 - Configuring your Email Settings

Screen | 2026-05-11 00:00:00 SN_EmailConfig

060.000 Configure Your Email Settings

Purpose

This screen is used to configure the secure email settings for the system.

All outbound system email routines use the values stored in this configuration.

This includes notifications, system alerts, support communications, and automated email generated by the platform.

Images

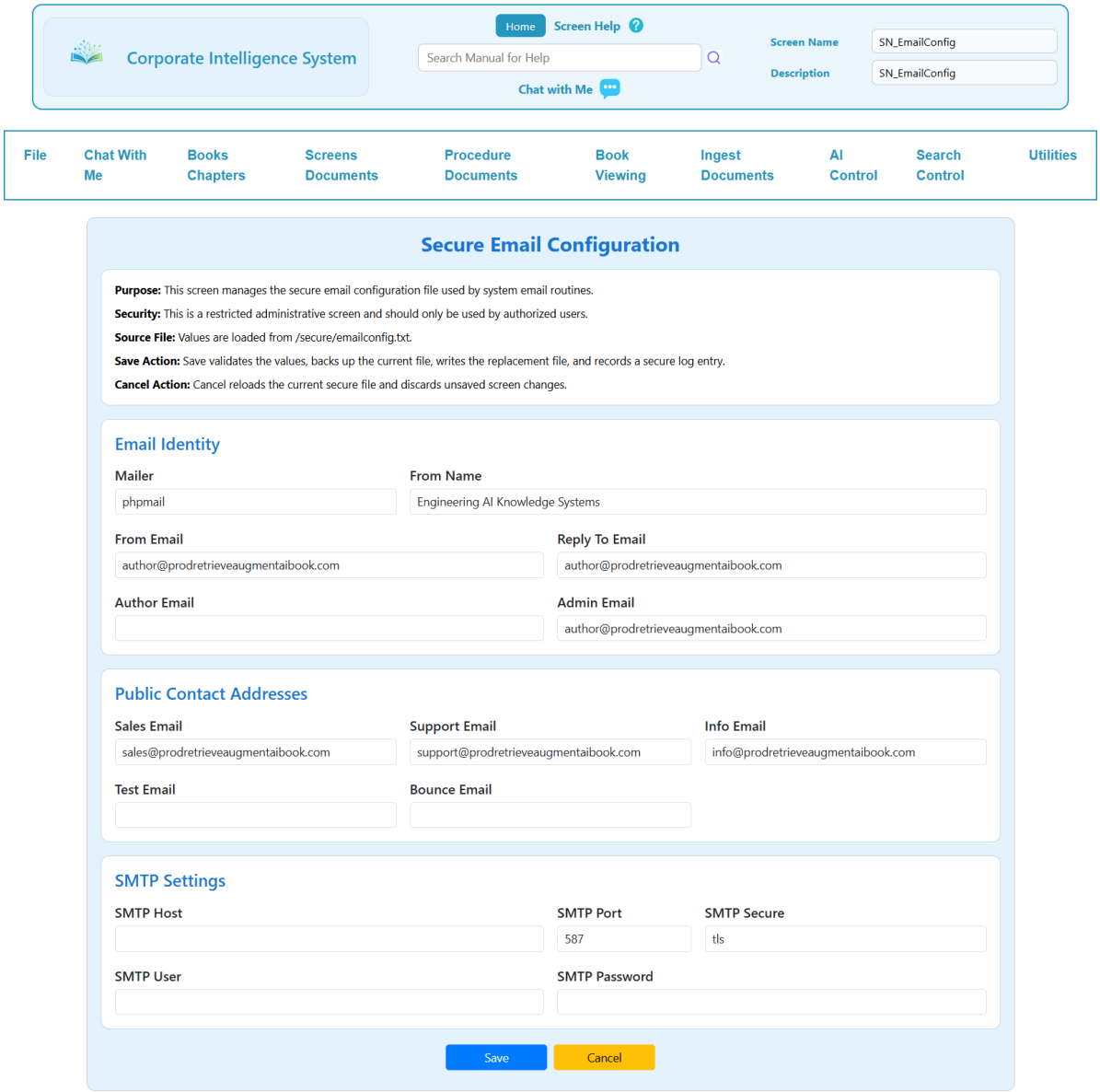


Figure: Secure Email Configuration screen.

Security

This is a restricted administrative screen.

Only authorized users should access and modify these settings.

The configuration is stored in a secure server-side file and is not maintained in standard database tables.

CriticalWarning

WARNING: IF THESE SETTINGS ARE INCORRECT, SYSTEM EMAIL FUNCTIONS MAY FAIL.

WARNING: SMTP ERRORS, AUTHENTICATION FAILURES, OR DELIVERY FAILURES MAY OCCUR IF VALUES ARE NOT VALID.

WARNING: CHANGES SHOULD ONLY BE MADE BY USERS WHO UNDERSTAND THE EMAIL ENVIRONMENT.

Processing

When the screen loads, the program reads the secure configuration file located at /secure/emailconfig.txt.

This file is the source of truth for all email configuration values.

The values are displayed on the screen for review and update.

When Save is pressed, the program validates the required fields and formats.

The program creates a full backup copy of the current configuration file.

The program writes a secure log entry for the change attempt.

The program rewrites the entire configuration file with the new values.

The program writes a success or failure log entry.

The file is always rewritten completely to maintain a consistent format.

When Cancel is pressed, the program reloads the current configuration file and discards any unsaved changes.

WhereToFind

Main Menu to Utilities to Email Configuration.

ButtonsAndActions

Save validates the entries, creates a backup of the current secure file, writes the new configuration file, and logs the activity.

Cancel reloads the current secure file and discards all unsaved changes.

HowToUse

Open the screen and review the current configuration values.

Update only the fields that require changes.

Verify all email addresses and SMTP settings carefully.

Press Save only when the values are confirmed to be correct.

Use Cancel to abandon any changes.

EmailIdentityFields

Mailer defines the mailer type used by the system, typically phpmail or an SMTP-based configuration.

From Name is the display name shown on outgoing emails.

From Email is the primary sending email address.

Reply To Email is the address where replies are directed.

Author Email is used for system-generated content attribution where applicable.

Admin Email is the primary administrative contact address for system-level notifications.

PublicContactAddresses

Sales Email is used for customer-facing sales inquiries.

Support Email is used for support and help desk communication.

Info Email is used for general inquiries.

Test Email is used for testing email functionality and validation.

Bounce Email is used to capture undeliverable or returned messages.

SMTPSettings

SMTP Host defines the mail server host name.

SMTP Port defines the communication port used by the mail server.

SMTP Secure defines the encryption method such as tls or ssl.

SMTP User is the authentication user for the mail server.

SMTP Password is the authentication password for the mail server.

ProtectedBehavior

The system reads the secure configuration file each time the screen is opened to ensure accuracy.

The configuration file is the authoritative source and is not partially updated.

The entire file is rewritten on each successful save operation.

All changes are logged to a secure server-side log file.

BackupAndLogging

Before any changes are applied, the system creates a full backup of the existing configuration file.

Backups are stored in the /secure/archive directory.

Each backup file includes a timestamp and user identifier.

All configuration changes are recorded in a secure log located in /secure/log.

The log records the user, action, result, and affected file names.

RulesAndValidations

Required fields must not be blank.

Email fields must contain valid email formats.

SMTP Port must be numeric.

The backup process must complete successfully before the new file is written.

The new configuration file must be written and verified after save.

DownstreamEffects

These settings control all outbound email generated by the system.

Incorrect values may result in failed email delivery or system communication issues.

Correct values ensure reliable email operation across all modules.

Summary

This screen manages the secure email configuration file used by all system email processes.

It provides a controlled, logged, and recoverable method for updating email settings.

All changes should be made carefully to maintain reliable system communication.

75.000 - Running Website Backups

Screen | 2026-05-11 00:00:00 `SN_Backup`

050.000 Running Website Backups

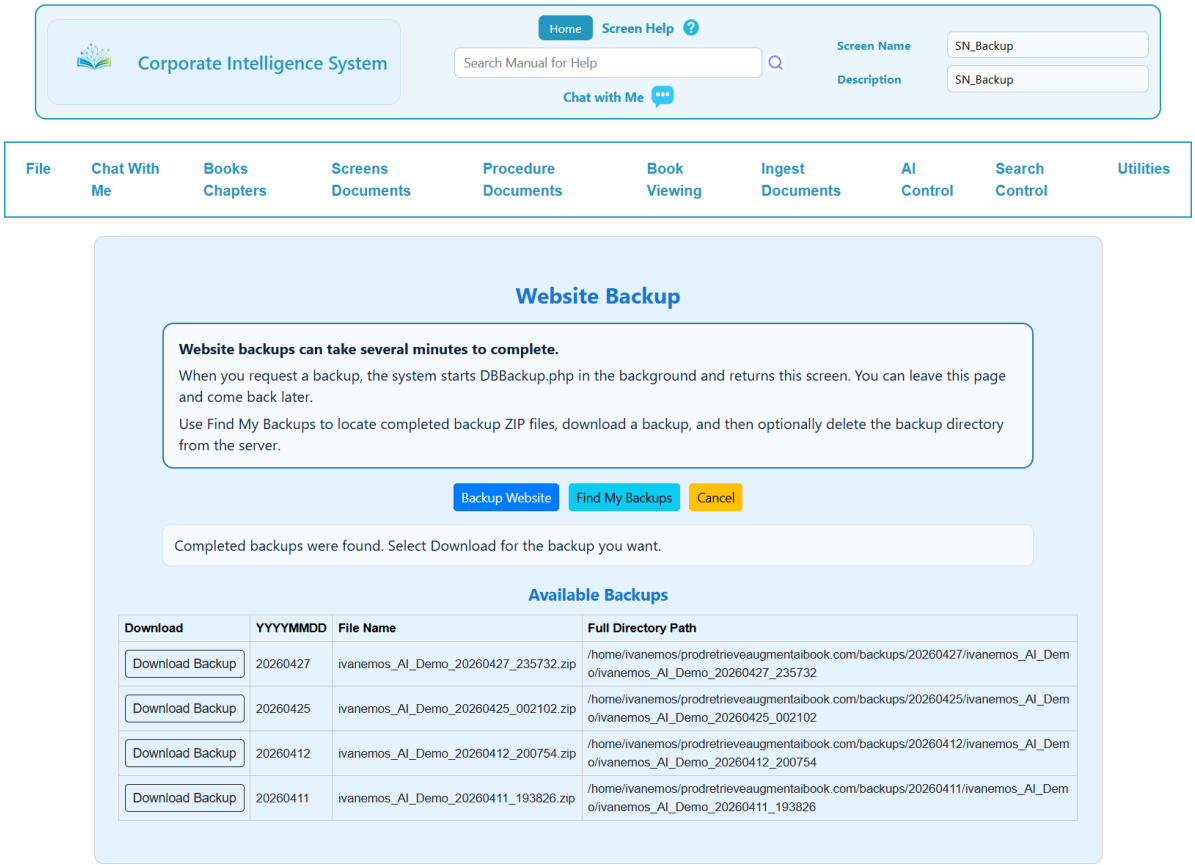
Purpose

This screen is used to run website backups in the background locate completed backup files download backup ZIP files and optionally delete completed backup folders from the server after download.

WhereToFind

Open the Administration or Utilities menu and select the Website Backup option.

Images



ButtonsAndActions

Backup Website: Starts the DBBackup program in the background so the backup can run without waiting on the screen.

Find My Backups: Searches the backups folder and displays completed backup ZIP files available for download.

Download Backup: Transfers the selected backup ZIP file to the document viewer for download.

Delete: Deletes the completed backup date folder from the server after download is confirmed.

Cancel: Cancels the current action and returns the screen to normal state.

FieldsOrSettings

BackupMessage: Displays current status such as backup started backups found download complete or delete completed.

YYYYMMDD: Shows the backup date folder that contains the completed backup set.

FileName: Displays the ZIP file name created by the backup process.

FullDirectoryPath: Displays the server directory where the backup ZIP file is stored.

KeysAndScope

Scope: This utility works only with backup files located under the website backups directory.

Key: Backup files are organized by backup date database name and timestamped run folder.

RulesAndValidations

The backups folder must exist or be created before backups are run.

The DBBackup program must exist in the tools directory before the backup request can start.

Only ZIP files located inside the backups folder are shown for download.

Delete actions remove the selected backup date folder and all folders and files beneath it.

DownstreamEffects

Completed backups create timestamped ZIP files that can be downloaded for archive recovery or transfer.

Deleting backups frees server disk space after files have been downloaded and secured elsewhere.

Examples

Select Backup Website then continue working while the backup runs in the background. Later choose Find My Backups select the newest ZIP file download it and then delete the server copy if no longer needed.

Troubleshooting

If no backups appear confirm the backup process completed and refresh using Find My Backups.

If a backup does not start confirm the DBBackup program exists in the tools folder.

If download fails confirm the ZIP file still exists in the listed directory.

If delete fails confirm file permissions allow removal of folders and files under backups.

SecurityAndAccess

Access to run backups download backup files or delete backup folders is controlled by security group

permissions assigned to system administrators.

80.000 - Downloading DB Audit Records

Screen | 2026-05-11 00:00:00 SN_DBAudit

500.000 Downloading DB Audit Records

Purpose

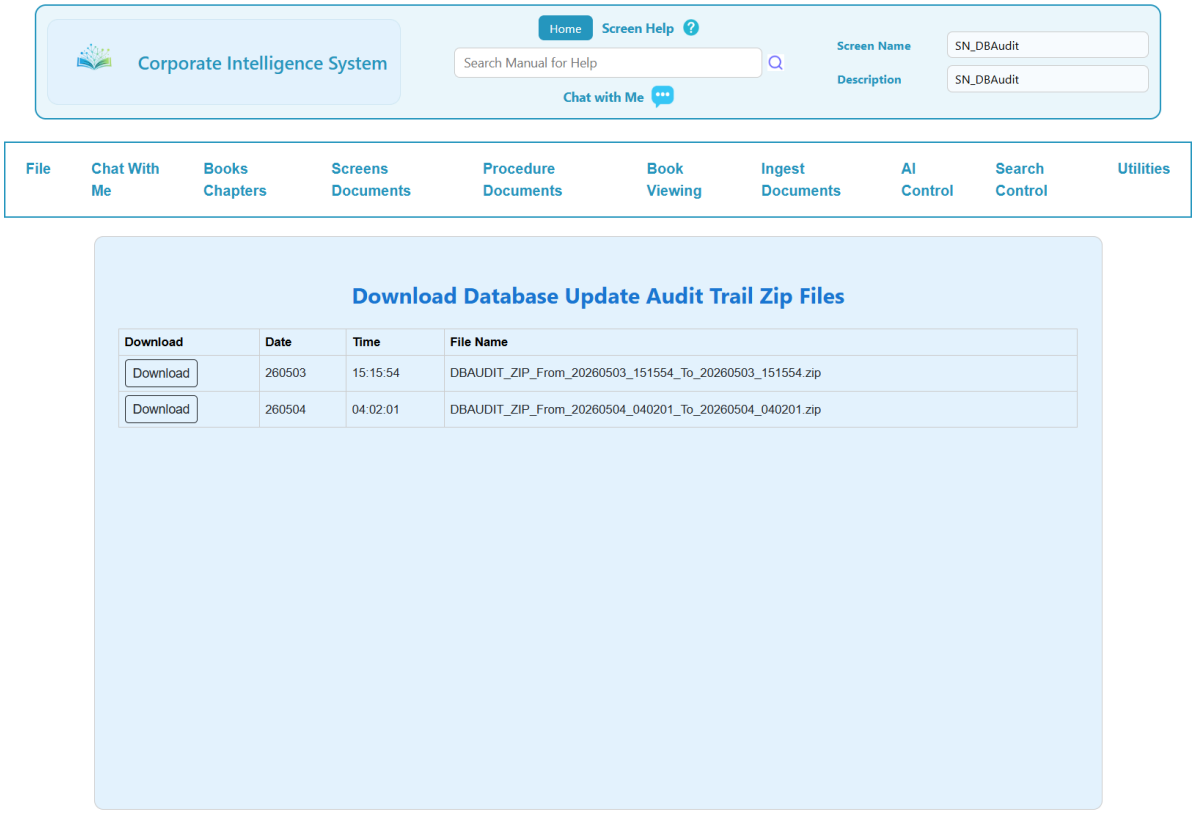
This screen is used to view and download archived database audit records that are generated by the system to track all database update activity performed by users.

The audit system captures a detailed record of every database insert update and delete operation and packages those records into daily archive files for long term storage and review.

WhereToFind

Open the Administration or Utilities menu and select the DB Audit Records option.

Images



SN_DBAudit.png

ButtonsAndActions

Download: Downloads the selected audit archive file using the document viewer program and returns to this screen after completion.

Return: Returns to the prior screen after reviewing or downloading the selected file.

FieldsOrSettings

FileName: Displays the name of the audit archive zip file generated by the nightly process.

DateTime: Displays the date and time associated with the audit archive file indicating when the audit data was packaged.

KeysAndScope

Scope: This screen operates at the system level and provides access to all audit archive files created by the nightly audit process.

Key: Each audit archive file is uniquely identified by its file name which includes the date and time range of the records contained within the file.

RulesAndValidations

Audit archive files are created automatically by the system through a scheduled nightly process and cannot be manually created from this screen.

Once an audit archive file is downloaded and returned to this screen the system removes the file from the active audit directory.

Audit records are only removed from the active directory after successful packaging into a zip archive.

DownstreamEffects

Downloading an audit archive transfers responsibility for long term storage to the system administrator or designated user.

After download and return the system deletes the archive file from the server to prevent duplication and manage storage.

Audit archives should be stored in a secure permanent library for compliance review and historical analysis.

Examples

A system administrator reviews the list of available audit archive files selects the most recent file and downloads it to a secure location for permanent retention.

Audit archives may be organized by date in a central repository to maintain a complete historical record of all database activity.

Troubleshooting

If no audit files are displayed confirm that the nightly audit process has executed successfully.

If a file cannot be downloaded verify that the file exists in the audit directory and that file permissions allow access.

If a file does not disappear after download confirm that the return process completed successfully.

SecurityAndAccess

Access to this screen is restricted to authorized users with administrative privileges.

Audit records contain detailed system activity and should be handled according to organizational security and compliance policies.

Only authorized personnel should download and store audit archive files.

AuditTrailOverview

The system maintains a comprehensive audit trail of all database update activity performed by all users.

This includes insert update and delete operations executed through standard system routines as well as parameterized and direct SQL execution methods.

Each audit record captures who performed the action when it occurred and the data involved in the operation.

AuditRecordStructure

An audit record includes the following data elements:

auditID: Unique identifier for the audit record.

userID: The user who performed the database operation.

auditDate: The date and time the operation occurred.

routineName: The system routine used to perform the operation.

actionType: The type of operation such as INSERT UPDATE or DELETE.

tableName: The database table affected by the operation.

connectionType: Indicates the database connection used such as company or default.

primaryKeysText: JSON representation of key fields identifying the record.

fieldsText: JSON representation of the data being inserted or updated.

beforeDataText: JSON snapshot of the record before the operation when applicable.

afterDataText: JSON snapshot of the record after the operation when applicable.

sqlText: The SQL statement used for direct or parameterized operations when applicable.

paramTypes: Parameter type string for parameterized SQL execution.

paramsText: JSON representation of parameters used in parameterized SQL.

resultStatus: Indicates whether the operation succeeded or failed.

errorText: Contains error details when an operation fails.

sourceProgram: The originating program or screen when available.

editor: The user recorded for audit consistency.

lastDate: The timestamp of the audit record entry.

AuditExample

Example of a captured audit record:

auditID: 14

userID: ivan

auditDate: 2026-05-03 14:45:23

routineName: createRecord

actionType: INSERT

tableName: Manual_Chapter_Table

connectionType: company

primaryKeysText:

fieldsText: {"BookName":"Operating Manual","ChapterNumber":"2000.000","ChapterName":"Web Site Set Up","PlacementSw":"M","ReadFromSw":"Both","Editor":"ivan","LastDate":"2026-05-03 14:45:23"}

beforeDataText:

afterDataText:

sqlText:

paramTypes:

paramsText:

resultStatus: ERROR

errorText:

sourceProgram:

editor: ivan

lastDate: 2026-05-03 14:45:23

AuditRetentionStrategy

The system provides a complete audit trail by capturing all database activity in real time and

transferring those records into daily archive files.

These archive files should be downloaded and stored in a secure permanent location to ensure long term availability for audit review compliance and forensic analysis.

Maintaining this archive library ensures that the organization has a continuous and verifiable history of all database changes across the system.

100.000 - Clean Up Logs

Screen | 2026-05-11 00:00:00 `SN_Clean`

100.000 Clean Up Logs

Purpose

This function is used to clean system logs and temporary records, typically after a batch program failure or abnormal system condition.

It helps reset the environment by removing leftover processing data that may interfere with normal operation.

WhatIsCleaned

System log files.

Session files.

Temporary records in API call tables.

Other temporary processing data created during prior operations.

ImportantNote

When this function is executed, the current user session is cleared.

You will be logged off and must log back into the system.

WhenToUse

After a batch program failure.

When system behavior appears inconsistent due to prior processing.

When instructed by system administration or support.

Summary

The Clean Up Logs function resets system working files and temporary data to restore a stable operating state.

2000.000 - WebSite Configuration Setup

10.000 - Composer Set Up

Procedure | 2026-05-11 17:25:03 Set up Composer Modules / WebSite Configuration Setup

010.000 Composer Set Up

Purpose

This section explains how to prepare the hosting environment for the AI application and related processing utilities.

The setup process installs Composer packages, Java support libraries, Python support libraries, and validation tools required by the system.

This setup is normally performed after the website account and domain have already been created inside cPanel.

The setup should be performed carefully because many AI, document processing, email parsing, PDF parsing, OCR, and reporting functions depend on these components.

UnderstandingThePaths

Most hosting environments use a structure similar to the following:

/home/cpanelname/domainname

Example:

/home/ivanemos/prodretrieveaugmentaibook.com

In this structure:

home is the Linux home directory.

cpanelname is the cPanel account login name.

domainname is the domain folder where the website files are stored.

You must replace the sample values with the actual cPanel account name and actual domain directory used on your server.

Most commands in this section assume you are already connected to the server terminal using SSH.

WhereToRunCommands

Most commands are executed from the Linux terminal.

The terminal is normally available from:

cPanel to Terminal

or

SSH terminal access.

The current directory can be checked with:

pwd

The contents of the current directory can be checked with:

ls -l

ComposerInstallation

Move into the main website directory before installing Composer packages.

Example:

cd /home/ivanemos/prodretrieveaugmentaibook.com

Download the Composer installer:

php -r "copy('https://getcomposer.org/installer', 'composer-setup.php');"

This downloads the Composer installation script into the current directory.

Run the Composer installer:

php composer-setup.php

This creates the Composer runtime file used to install PHP packages.

ComposerPackages

The following Composer packages are used by the system.

Install each package from the website root directory.

Command:

php composer.phar require mpdf/mpdf

This package is used for PDF generation.

Command:

php composer.phar require phpoffice/phpword

This package is used for Microsoft Word document processing.

Command:

php composer.phar require phpoffice/phpspreadsheet

This package is used for spreadsheet processing and Excel support.

Command:

php composer.phar require mpdf/mpdf

This package supports PDF rendering and document output.

Move into the home directory version of the website path:

cd ~/prodretrieveaugmentaibook.com

Install RTF conversion support:

composer require clank-ai/rtf-converter

This package is used to process RTF document content.

Install MIME email parser support:

composer require zbateson/mail-mime-parser

This package is used for parsing MIME email messages and attachments.

Install HTML to text conversion support:

composer require html2text/html2text

This package converts HTML content into readable plain text.

Install PDF parser support:

composer require smalot/pdfparser

This package extracts text content from PDF documents.

Install OCR support package:

composer require thiagoalessio/tesseract_ocr

This package provides OCR integration support for image and scanned document processing.

JavaLibrarySetup

The Java processing layer requires the Gson JSON library.

Download the Gson library from:

https://repo1.maven.org/maven2/com/google/code/gson/gson/2.10.1/gson-2.10.1.jar

After downloading the file, copy it into the Java library directory:

/home/ivanemos/prodretrieveaugmentaibook.com/java/lib/gson-2.10.1.jar

The gson jar file is required for Java JSON processing and API communication support.

JavaCompileProcess

Move into the Java directory:

cd /home/ivanemos/prodretrieveaugmentaibook.com/java

Compile all Java source files:

javac -cp .:lib/gson-2.10.1.jar *.java

This compiles all Java source files in the current directory using the Gson support library.

If compilation succeeds, Java class files will be generated.

If compilation fails, review the displayed errors carefully before continuing.

PythonInstallation

The system also requires Python support libraries.

Install the pymysql library:

python3 -m pip install --user pymysql

This package allows Python scripts to communicate with MySQL or MariaDB databases.

Verify the installation:

python3 -m pip show pymysql

This command displays the installed pymysql package information.

PythonValidation

After Python scripts are uploaded, validate the syntax of all Python files.

Run the following command:

for f in /home/ivanemos/prodretrieveaugmentaibook.com/pythonscripts/*.py; do echo "Checking $f"; python3 -m py_compile "$f" || break; done

This command checks every Python script for syntax errors.

If a syntax error is found, the validation process stops at the failing script.

After validation completes successfully, check the generated Python cache directory:

ls -l /home/ivanemos/prodretrieveaugmentaibook.com/pythonscripts/__pycache__

The __pycache__ directory confirms that Python bytecode compilation completed successfully.

RulesAndRecommendations

Always run Composer commands from the correct website root directory.

Always verify the current directory before running install or compile commands.

Do not mix multiple websites inside the same Composer or Java directory structure.

After installing packages, verify that the vendor directory was created successfully.

If package installation fails, verify PHP version compatibility and terminal permissions.

If Java compilation fails, verify the Gson jar file path and Java installation.

If Python validation fails, correct the reported script before continuing.

Keep a backup copy of all custom Java and Python source files before major upgrades.

DownstreamEffects

Composer packages support PDF generation, document conversion, spreadsheet handling, OCR processing, email parsing, and AI document preparation.

Java support libraries enable API communication and JSON processing support for Java worker programs.

Python libraries enable database communication and AI processing utilities.

Validation steps help identify missing dependencies or syntax errors before production processing begins.

20.000 - Data Base Set Up

Procedure | 2026-05-11 17:41:29 Data Base Set Up / WebSite Configuration Setup

020.000 Database Set Up

Purpose

This section explains how to configure the database connection settings used by the application.

The database configuration file stores the connection information required by the PHP programs, Java programs, Python scripts, and AI processing utilities.

The configuration must be completed before the application can communicate with the database server.

DatabaseConfigurationFile

The database configuration file is located in the secure folder of the website.

Open the following file:

/secure/database.txt

This file contains the environment configuration and database login information used by the system.

You must edit the file and replace the placeholder values with the actual database values for your hosting environment.

RequiredConfiguration

The configuration file should contain values similar to the following:

EnvironmentMode=legacy

DB_SERVER=localhost

DB_USER=USERNAME

DB_PASSWORD=USERPASSWORD

DB_NAME=DBNAME

DB_PORT=3306

CDB_SERVER=localhost

CDB_USER=USERNAME

CDB_PASSWORD=USERPASSWORD

CDB_NAME=DBNAME

CDB_PORT=3306

ImportantEnvironmentSetting

The value:

EnvironmentMode=legacy

must remain exactly as shown unless the system architecture is intentionally being changed later.

Do not remove or rename this setting.

The legacy mode setting is required by the current application environment and processing flow.

PrimaryDatabaseSettings

The DB_ entries define the primary application database connection.

DB_SERVER identifies the database server name or IP address.

DB_USER identifies the database login user.

DB_PASSWORD identifies the password assigned to the database user.

DB_NAME identifies the primary database name.

DB_PORT identifies the database server port number.

Most shared hosting environments use:

localhost

for the server name and:

3306

for the MySQL or MariaDB port.

SecondaryDatabaseSettings

The CDB_ entries define a second database connection structure.

This second connection exists for future expansion and advanced architecture support.

The design allows the system to later separate operational databases, AI databases, company databases, archive databases, or reporting databases if needed.

At the current stage of installation, both database connections should normally point to the same database server and database credentials.

For initial installation:

Set the CDB_ values exactly the same as the DB_ values.

Example:

DB_SERVER=localhost

CDB_SERVER=localhost

DB_USER=myuser

CDB_USER=myuser

DB_PASSWORD=mypassword

CDB_PASSWORD=mypassword

DB_NAME=mydatabase

CDB_NAME=mydatabase

SavingTheConfiguration

After the values are updated, save the database.txt file back into the secure directory.

Verify that the file permissions allow the application to read the file.

The secure directory should not normally be publicly accessible from the web browser.

RulesAndRecommendations

Do not leave placeholder values such as USERNAME or DBNAME in production systems.

Do not expose database passwords inside public web directories.

Do not rename the configuration file unless the application source code is also updated.

Keep backup copies of the database configuration before major environment changes.

If the database server changes later, update both DB_ and CDB_ sections carefully.

If future multi-database expansion is implemented, the CDB_ section may later point to a different database server or database schema.

Troubleshooting

If the application cannot connect to the database, verify the database server name, user name, password, database name, and port values.

If login errors occur, verify that the database user has permission to access the specified database.

If localhost does not work in the hosting environment, verify the correct database host name with the hosting provider.

If database operations fail after configuration changes, confirm that both DB_ and CDB_ sections were updated correctly.

DownstreamEffects

The database configuration file is used by the PHP application layer, Java processing layer, Python processing layer, AI processing routines, and supporting utility programs.

Incorrect database configuration prevents the system from loading data, processing AI requests, saving documents, or running maintenance utilities.

The dual database structure provides future flexibility for expanded enterprise-level database architecture.

30.000 - Setting up PHP.ini .htaccess Parameters

Procedure | Set Up Php.ini / WebSite Configuration Setup

030.000 Setting Up Server Parameters

Purpose

This section explains that the production website requires server settings that support uploads, long processing jobs, large forms, document conversion, and AI processing.

RuntimeSettings

The server should allow enough processing time for long-running jobs.

The server should allow enough upload capacity for large documents.

The server should allow enough memory for document processing and report generation.

The server should allow enough form fields for large administrative screens.

The server should hide internal error details from public users.

The server should maintain session information in the location controlled by the hosting provider.

WebsiteStartupSettings

The server should start the website through the main application page.

The server should use the correct runtime version selected for the application.

The server should support long-running requests so document processing and AI processing are not interrupted.

ConfigurationManagement

Administrators should use the hosting control panel or hosting provider instructions when changing server settings.

Administrators should keep backups before changing configuration files.

Administrators should verify the settings after changes are made.

DownstreamEffects

Correct server settings help prevent upload failures, timeout failures, memory failures, missing form values, startup failures, and interrupted AI processing.