

OPERATING MANUAL

Corporate Intelligence System

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1.000 - Foundations of Corporate Intelligence

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 | 2026-07-25 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 and operational data into searchable knowledge, grounded answers, and actionable business intelligence.

The platform is designed to help organizations preserve institutional knowledge, improve retrieval speed, increase consistency, analyze business data, and support AI-driven answers grounded in their own authorized content and data sources.

What The System Is

The Corporate Intelligence System is a structured knowledge and analytics platform that combines documentation management, intelligent search, controlled retrieval, conversational AI, data analysis, graph generation, and security-based access.

It is not only a file repository.

It is not only a search engine.

It is not only an AI chat screen.

It is not only an analytics application.

It is the coordinated use of structure, indexing, metadata, security, retrieval logic, approved data access, analytical planning, and AI reasoning to make organizational knowledge and business data usable.

From Stored Information to Usable Intelligence

Many systems store documents.

Many systems also store operational data.

Few systems turn both documents and data into understandable and actionable answers.

This platform converts static content and authorized business data into a living intelligence environment through organized books, chapters, sections, metadata, keywords, indexing, secure data connections, analytical processes, and AI-assisted retrieval.

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

Data that once required specialized reports, manual spreadsheet work, or technical assistance can be analyzed through plain-language questions.

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, RTF, and supported text files.

Program documentation.

Screen help content.

Research notes and internal knowledge entries.

Historical reference materials.

Static spreadsheets and worksheets prepared for analysis.

Approved real-time operational data provided through secured database views or authorized application programming interfaces.

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.

Security rules determine which users can access specific knowledge, analytical functions, and data sources.

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 supported by authorized source material.

The system can also combine retrieved documentation with approved analytical data when a question requires both policy context and numerical evidence.

Integrated Business Analytics

The Corporate Intelligence System extends beyond document retrieval by providing integrated business analytics.

Authorized users can load static spreadsheets or worksheets into controlled internal data tables for analysis.

The system can also connect to approved real-time business data through secured database views and authorized application programming interfaces.

This allows organizations to analyze historical information, current operating results, and changing business conditions from within the same intelligence environment.

Static Spreadsheet Analytics

Static spreadsheets can be loaded into the system and converted into structured analytical data.

Users can ask questions about the complete worksheet instead of manually reviewing rows, columns, formulas, and totals.

The system can identify trends, compare periods, calculate totals, summarize categories, locate exceptions, and generate graphs from the uploaded data.

This provides a controlled method for analyzing reports, exports, budgets, operational worksheets, financial schedules, and other structured business files.

Secure Real-Time Data Analytics

Organizations can provide access to current operational data through secured database views or approved application programming interfaces.

The system does not require unrestricted access to the complete customer database.

Only approved views, fields, records, and data sources are made available for analysis.

This controlled approach allows the organization to protect sensitive systems while still providing authorized users with timely analytical capabilities.

Because the data can be retrieved at the time of the question, users can receive answers based on current business conditions rather than relying only on previously exported reports.

Plain-Language Analytical Questions

Users can ask analytical questions in ordinary business language.

They do not need to know database structures, table names, field names, SQL syntax, or graphing commands.

The system interprets the request, identifies the appropriate authorized data source, develops a retrieval plan, obtains the required data, performs the analysis, and presents the results.

Questions can include totals, averages, comparisons, trends, rankings, exceptions, forecasts, distributions, and relationships between business measures.

Role-Based Analytical Perspectives

Analytical answers can be presented according to the responsibilities and information needs of the user.

An executive may require a concise summary of overall performance, major trends, risks, and strategic

implications.

A manager may require departmental comparisons, operating results, resource utilization, and performance against objectives.

A supervisor may require detailed workflow, productivity, exception, and employee-level information within the supervisor's authorized area.

An employee may require information related to assigned responsibilities, current work, permitted records, and individual performance measures.

The system applies security and audience controls so the level of detail remains appropriate for the authorized user.

Analytical Results and Graphs

The system can return analytical answers in written form, structured data displays, and visual graphs.

Graphs can be generated when visual presentation improves understanding of the results.

Available presentations may include trend graphs, comparisons, category distributions, rankings, performance summaries, and other visual representations appropriate to the question.

The graph is generated from the same retrieved data used to produce the written analytical answer.

Full Analytical Transparency

The system is designed to make the analytical process visible and reviewable.

Users can review the data returned for the analysis.

Users can review the retrieval plan used to determine what information was required.

Users can review the graph plan used to determine how the results should be visualized.

Users can review the executed SQL statement used to retrieve authorized database data.

This transparency allows users, managers, analysts, auditors, and technical personnel to understand how the answer was produced.

It also helps identify incorrect assumptions, incomplete data, unsuitable filters, or questions that require additional clarification.

Why Transparency Matters

An analytical answer should not function as an unexplained black box.

Business users must be able to understand what data was selected and how the system reached its conclusion.

Technical users must be able to verify that the retrieval logic and executed SQL accurately represent the request.

Managers must be able to determine whether the answer is appropriate for the business decision being considered.

Full transparency improves trust, accountability, validation, and responsible use of AI-generated analytics.

Security and Controlled Access

Access to documents, data sources, analytical functions, and returned results is controlled by system security.

Users can only retrieve knowledge and data they are authorized to access.

Secured views can limit available tables, fields, records, departments, companies, locations, or other business dimensions.

Role-based access can further control which analytical details are available to executives, managers, supervisors, and employees.

This allows the organization to expand analytical access without abandoning governance or exposing unrestricted operational data.

Combining Knowledge and Data

The platform can use both documentary knowledge and analytical data when answering a question.

A user may ask what a policy requires and whether current operating data indicates compliance with that policy.

A manager may ask for current performance results and then request the related procedure used by the responsible department.

An executive may review a graph showing a business trend and then ask the system to locate organizational guidance that may explain or address that trend.

This combination of knowledge retrieval and data analytics creates a more complete form of organizational intelligence.

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.

Business users analyze spreadsheets without manually reviewing large amounts of data.

Authorized personnel obtain current analytical answers from approved operational data sources.

Executives receive concise summaries and visual indicators of important business conditions.

Managers and supervisors gain access to the details required to investigate performance and operational issues.

Analytical results can be validated through the returned data, retrieval plan, graph plan, and executed SQL.

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.

New spreadsheets and analytical data sets can be loaded.

Additional secured database views and application programming interfaces can be authorized.

Retrieval and analytical rules can be improved.

New graph types and reporting methods can be introduced.

AI capabilities can expand while continuing to rely on controlled source knowledge and authorized business data.

What Makes This Different

Many products solve only one part of the problem.

Some store files.

Some provide search.

Some provide AI chat.

Some analyze spreadsheets.

Some provide dashboards or database reports.

The Corporate Intelligence System integrates authoring, ingestion, search, retrieval, conversational AI, static spreadsheet analytics, secure real-time data analytics, graph generation, analytical transparency, security, and governance in one environment.

It allows organizational knowledge and operational data to support the same question, the same user, and the same decision-making process.

Conclusion

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

Data becomes valuable when authorized users can understand what it means and verify how the conclusions were produced.

The Corporate Intelligence System is designed to turn stored information and current operational data into a practical, transparent, and secure business advantage.

30.000 - What This Platform Delivers

Screen | 2026-07-25 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, publishing, static spreadsheet analytics, secure real-time data analytics, graph generation, and controlled access within one integrated environment.

A Unified Knowledge and Analytics Environment

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

This platform combines those functions into one coordinated system.

Users can create knowledge, load information, search content, analyze data, generate graphs, and interact through AI without moving between disconnected applications.

This reduces fragmentation and gives users one controlled location for knowledge and business intelligence.

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.

Structured organization improves navigation, search quality, maintenance, and long-term usability.

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.

Existing information can be organized, indexed, categorized, and made available according to security and audience rules.

Intelligent Search and Retrieval

The search engine uses more than simple keyword matching.

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

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

The system can retrieve the most relevant sections and provide them as controlled source material for AI-assisted responses.

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.

Users can review the information returned by the retrieval process and understand which source content supports the answer.

Static Spreadsheet Analytics

The platform allows authorized users to load complete spreadsheets or individual worksheets for analysis.

Spreadsheet data can be converted into controlled internal tables that support structured queries, summaries, comparisons, and graph generation.

Users can ask questions about the data in plain business language without manually reviewing large numbers of rows and columns.

The system can calculate totals, averages, percentages, rankings, trends, exceptions, distributions, and relationships within the loaded data.

This capability can be used for budgets, financial reports, sales reports, operational records, inventory files, customer lists, performance data, and other structured business information.

Secure Real-Time Data Analytics

The platform can also analyze current operational data through secured database views or authorized application programming interfaces.

The organization determines which data sources, views, fields, and records are available to the system.

The platform does not require unrestricted access to the complete operational database.

Approved data can be retrieved at the time a question is asked so the answer reflects current business conditions.

This allows users to move beyond static reports and ask questions directly against authorized real-time data.

Plain-Language Analytical Questions

Users can ask analytical questions using ordinary business language.

They do not need to understand SQL, database structures, field names, table relationships, or graphing commands.

The system interprets the request, identifies the appropriate authorized data source, develops a retrieval plan, generates the required SQL, retrieves the data, performs the analysis, and prepares the response.

Users can ask for summaries, comparisons, trends, rankings, exceptions, performance measures, and other analytical results.

Role-Based Analytical Results

The system can present analytical results according to the role and responsibilities of the user.

Executives can receive concise summaries, major trends, risks, and strategic indicators.

Managers can receive departmental results, comparisons, exceptions, and performance details.

Supervisors can receive operational, workflow, productivity, and employee-level information within their authorized area.

Employees can receive information related to their assigned duties, permitted records, and individual responsibilities.

Security rules control which data and level of detail each user is permitted to access.

Graphs and Visual Results

The platform can present analytical results through written responses, structured data tables, and graphs.

Graphs can be generated when visual presentation improves understanding of the results.

Available visualizations may include trends, comparisons, rankings, category distributions, performance summaries, and other business measures.

The graph is generated from the same retrieved data used to produce the analytical answer.

This allows users to review both the conclusion and the underlying data that supports it.

Full Analytical Transparency

The platform provides transparency into how analytical answers are produced.

Users can review the data returned by the query.

Users can review the retrieval plan used to identify and obtain the required data.

Users can review the graph plan used to determine how the results should be visualized.

Users can review the executed SQL statement used to retrieve the authorized data.

This makes the analytical process visible, understandable, and reviewable.

Managers, analysts, auditors, and technical personnel can verify that the data, filters, calculations, and retrieval logic accurately represent the original question.

Combine Knowledge and Analytics

The platform can combine organizational knowledge with analytical data in the same response.

A user can ask what a policy requires and whether current operating data indicates compliance.

A manager can review a performance result and then retrieve the related procedure or operating guide.

An executive can identify a trend in current data and then ask the system to locate supporting documentation that may explain the condition.

This creates a more complete form of intelligence by connecting what the organization knows with what the organization is currently experiencing.

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.

Knowledge can remain available to future employees even after the original authors or subject matter experts are no longer present.

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.

Business users can analyze spreadsheets without manually reviewing large amounts of data.

Authorized users can obtain current answers from approved operational data sources.

Executives and managers can identify trends and exceptions more quickly.

Supervisors can investigate performance and workflow issues using detailed authorized data.

Controlled Security and Governance

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

The same security principles apply to documents, analytical data sources, returned records, graphs, and generated answers.

Secured database views can limit access to specific tables, fields, companies, departments, locations, or records.

Administrative tools support maintenance, scoring controls, indexing options, data source management, and operational oversight.

This allows the organization to expand knowledge and analytical access without abandoning governance.

Designed to Grow with the Organization

New books may be added.

Additional content sources may be loaded.

New spreadsheets and worksheets may be added for analysis.

Additional secured database views and application programming interfaces may be authorized.

Search and retrieval logic may be refined.

Analytical rules and graph options may be expanded.

AI capabilities may continue to improve.

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

What Makes This Different

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

Some systems manage documents but cannot analyze operational data.

Some systems produce reports but do not preserve organizational knowledge.

Some AI tools provide answers without showing the source data, retrieval plan, graph plan, or executed SQL.

The Corporate Intelligence System combines content creation, ingestion, search, retrieval, conversational assistance, publishing, spreadsheet analytics, secure real-time analytics, graph generation, transparency, security, and governance in one coordinated platform.

Conclusion

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

When information is organized, searchable, analyzable, transparent, 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

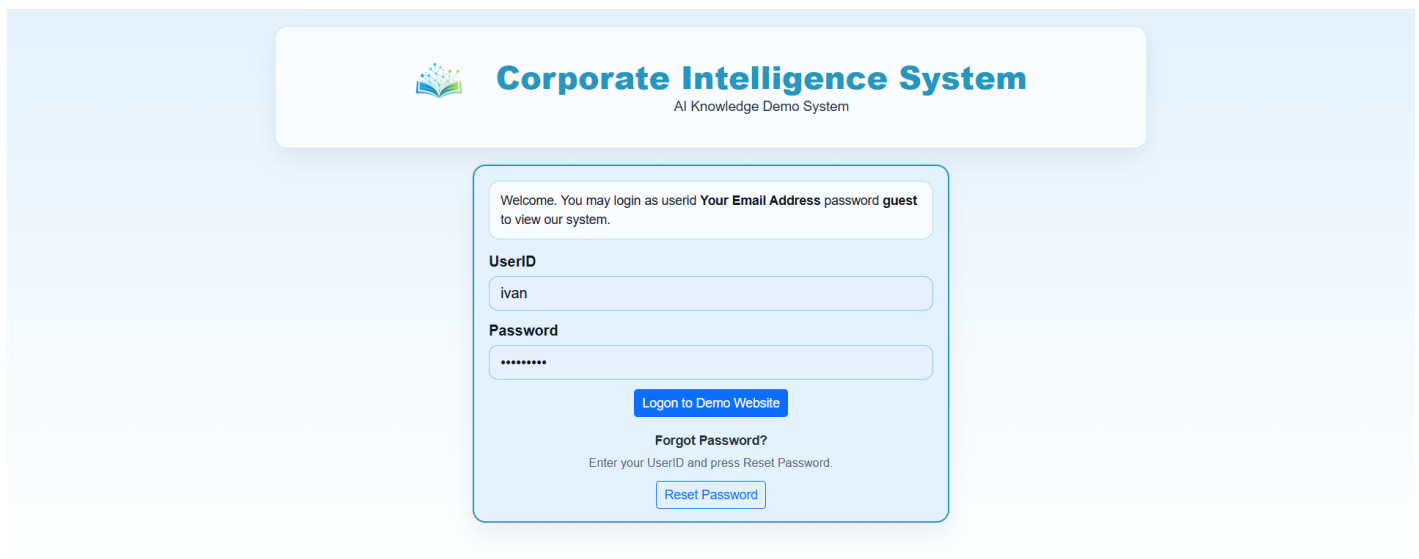


Figure: System Login screen used to authenticate authorized users and begin a secure session.

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.

15.000 - Changing Your Password

Screen | 2026-06-02 21:53:51 loginchange

015.000 Changing Your Password

Purpose

This screen allows a user to create a new password for their account after a password reset request has been initiated.

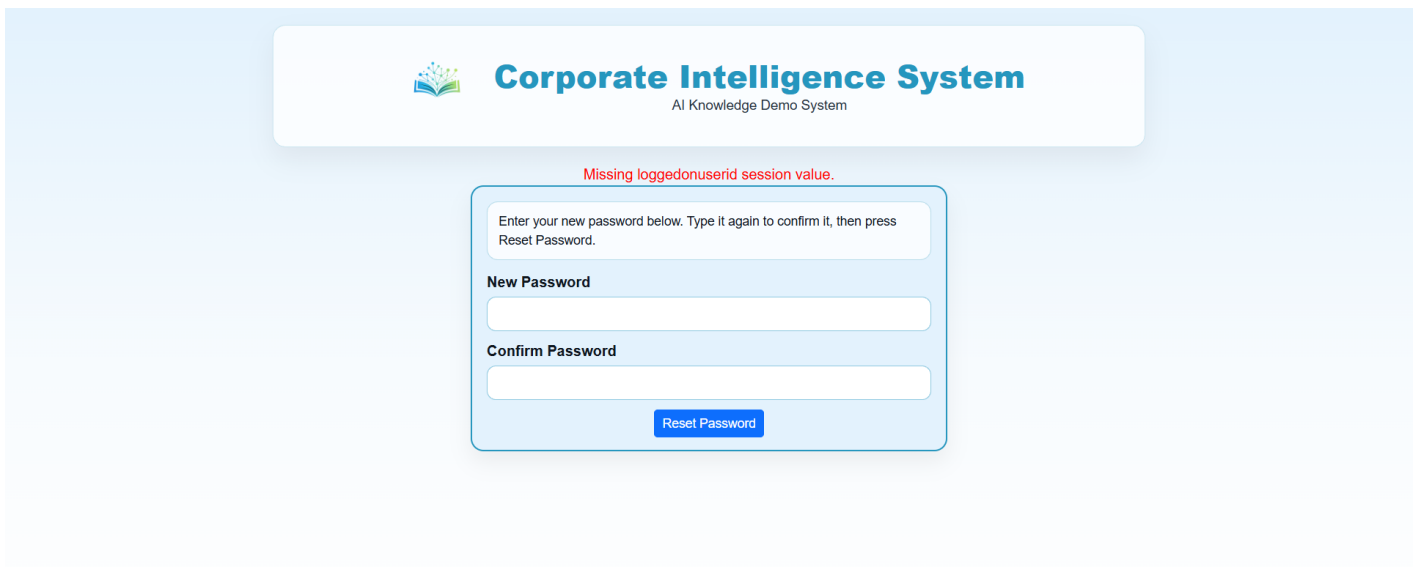
Password changes help maintain account security and ensure only authorized users can access the Corporate Intelligence System.

Where To Find

This screen normally appears after a successful password reset request has been validated by the system.

Users are typically directed to this screen from a password recovery email link or from the Forgot Password process.

Images



The screenshot shows a web interface for the 'Corporate Intelligence System' (AI Knowledge Demo System). At the top, there is a header with the system name and logo. Below the header, a red error message reads: 'Missing loggedonuserid session value.' The main content area contains a form for resetting the password. The form has a text input field for the 'New Password' and another for the 'Confirm Password'. Below these fields is a blue button labeled 'Reset Password'. The form is enclosed in a light blue border.

Figure: Change Password screen used to enter and confirm a new password for a user account.

Why Password Changes Matter

Passwords protect user accounts and system information from unauthorized access.

Using a strong password helps safeguard documents manuals AI resources administrative functions and other system data.

Changing passwords when requested by the system or after a suspected security issue is an important security practice.

Buttons and Actions

Reset Password validates the entered passwords and updates the account with the new password when all requirements have been satisfied.

Fields or Settings

New Password is the new password that will be assigned to the account.

Confirm Password is used to re-enter the new password to verify that it was typed correctly.

Rules and Validations

Both password fields are required.

The New Password and Confirm Password values must match exactly.

Password requirements may vary depending on system security settings.

The system may reject passwords that do not meet configured security standards.

Downstream Effects

A successful password change updates the user's account credentials.

The previous password is no longer valid after the change has been completed.

The user may then continue to the login process using the newly created password.

Examples

Enter a new password in the New Password field.

Type the same password again in the Confirm Password field.

Select Reset Password to save the new password and complete the password reset process.

Troubleshooting

If the password change fails verify that both password entries are identical.

Check for typing mistakes capitalization differences or extra spaces.

If the screen displays a missing session or invalid reset message restart the password recovery process.

If problems continue contact a system administrator for assistance.

Security and Access

Passwords should be known only to the account owner.

Do not share passwords with other users.

Choose a password that is difficult to guess and avoid using common words or personal information.

After changing a password successfully always keep the new password in a secure location.

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

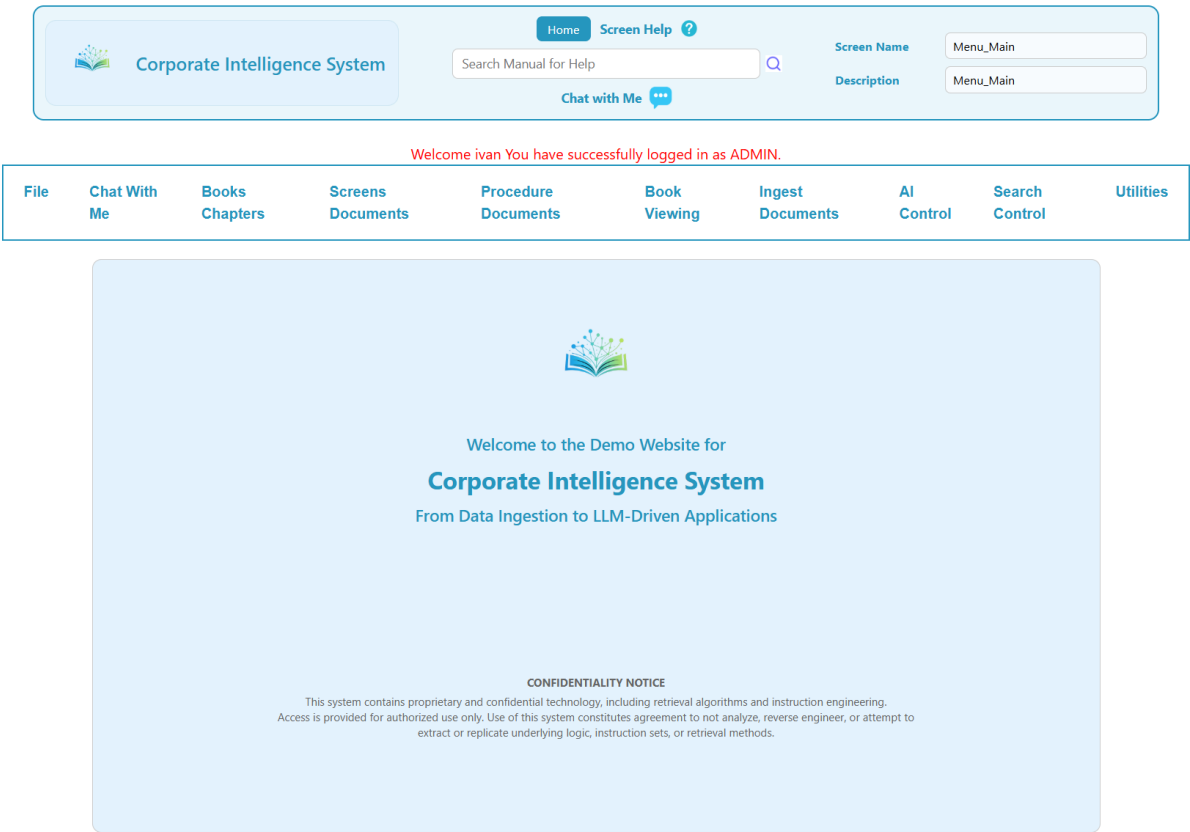


Figure: Main system menu and navigation gateway for books search AI chat ingestion administration and utilities.

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

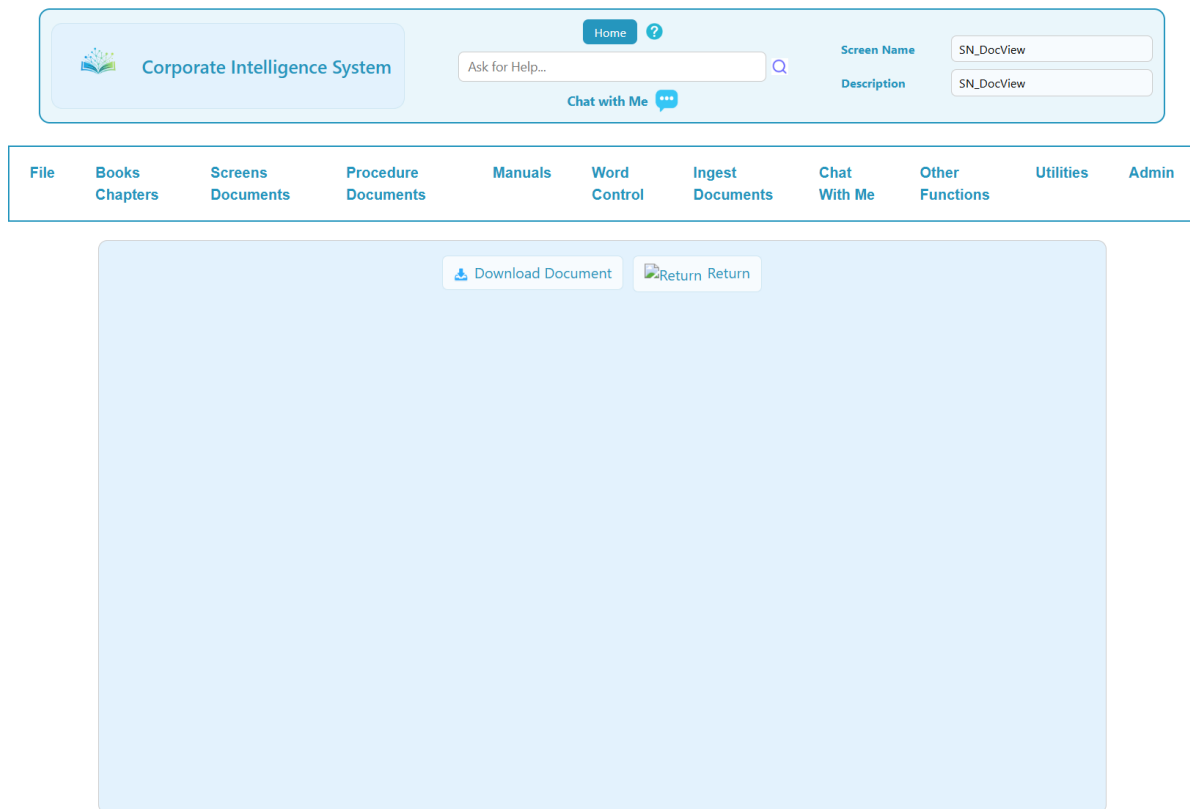


Figure: Document download screen used to retrieve authorized stored files and return to the calling program.

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 | 2026-07-18 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.

Structured Manual Generation

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.

Inverted Index Searching

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.

AI Chat Retrieval

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.

Uploaded Documents Versus System Created Books

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.

Human Resources Example

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 Procedures

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.

Home ?

Ask for Help...

Chat with Me

Screen Name

SN_Procedures

Description

SN_Procedures

File

Books Chapters

Screens Documents

Procedure Documents

Book Viewing

Word Control

Ingest Documents

Chat With Me

Other Functions

Utilities

Admin

NOTE: Applying the most relevant metadata and keywords will significantly improve the AI Chat Agent responses to the client

Procedure Categories

Operating Manual

Select

Category

Select

Managing Books

Managing KeyWords

Managing Stop Words

Managing Synonyms

Managing Books

+Add

Delete

Procedures

Procedure	Description	Actions
A Overview of Books Chapters and Pages	Overveiw of Managing Books Chapters Documents and	
Create Screen Documents	How to Create Screens and Documents	
Creating Book Titles	How to Create and Manage Books	
Creating Chapters	How to Create Manage Chapters	
Create Procedures	How to Create Procedures	

Selected

A Overview of Books Chapters and Pages

Srch>

Search

+Add

Save Cancel

Book Name:

Operating Manual

Category:

Managing Books

Procedure Name:

A Overview of Books Chapters and Pages

Chapter Name:

Procedures Book Management

Section Name:

Overveiw of Managing Books Chapters Documents and

Section Number:

100.000

Procedure Description:

Overveiw of Managing Books Chapters Documents and

Doc Type:

PROCEDURE_DOCUMENT

Audience:

BOTH

Help Mode:

HTML

Procedure Text:

```

<div class="manual-section">
<h2><strong>Procedure Name Overview of Books Chapters and Pages</strong></h2>
<h3>Book Name</h3>
<p>Operating Manual</p>
<h3>Procedure Category</h3>
<p>Managing Books</p>
<h3>Purpose</h3>
<p>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.</p>
<h3>General Information</h3>
<p>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.</p>
<h3>Where To Find</h3>
<p>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.</p>

```

Figure: Procedure Detail Area.

Operating Manual

**Corporate Intelligence System**

[Home](#) [?](#)

[Chat with Me](#)

Screen Name
SN_Procedures

Description
SN_Procedures

Index reindex OK. Processed=1 Skipped=0 Postings=242
Procedure processed successfully.
Save OK.

[File](#) [Books Chapters](#) [Screens Documents](#) [Procedure Documents](#) [Book Viewing](#) [Word Control](#) [Ingest Documents](#) [Chat With Me](#) [Other Functions](#) [Utilities](#) [Admin](#)

Chunk Database Preparation

We have completed the parsing of the document and we are ready to prepare this parsing and prepare the database so the ai chat agent can use this data press below to start this process

Process for DB

NOTE: Applying the most relevant metadata and keywords will significantly improve the AI Chat Agent responses to the client

Procedure Categories
 [Select](#)

Category	Select
Managing Books	☒
Managing KeyWords	☒
Managing Stop Words	☒
Managing Synonyms	☒

[Add](#) [Delete](#)

Procedures

Procedure	Description	Actions
A Overview of Books Chapters and Pages	Overveiw of Managing Books Chapters Documents and	Add Delete
Create Screen Documents	How to Create Screens and Documents	Add Delete
Creating Book Titles	How to Create and Manage Books	Add Delete
Creating Chapters	How to Create Manage Chapters	Add Delete
Creating Procedures	How to Create Procedures	Add Delete

Selected

[Search](#) [Add](#)

Figure: Chunk Processing for Procedure Help.

**Corporate Intelligence System**

[Home](#) [?](#)

[Chat with Me](#)

Screen Name
SN_Procedures

Description
SN_Procedures

Chunk processing completed successfully. You may now build vectors.

[File](#) [Books Chapters](#) [Screens Documents](#) [Procedure Documents](#) [Book Viewing](#) [Word Control](#) [Ingest Documents](#) [Chat With Me](#) [Other Functions](#) [Utilities](#) [Admin](#)

Vector Preparation

The database has been prepared now we need to vector the data so that the ai chat agent can evaluate relevant data to a user request press below to start this process

Process for Vector

NOTE: Applying the most relevant metadata and keywords will significantly improve the AI Chat Agent responses to the client

Procedure Categories
 [Select](#)

Category	Select
Managing Books	☒
Managing KeyWords	☒
Managing Stop Words	☒
Managing Synonyms	☒

[Add](#) [Delete](#)

Procedures

Procedure	Description	Actions
A Overview of Books Chapters and Pages	Overveiw of Managing Books Chapters Documents and	Add Delete
Create Screen Documents	How to Create Screens and Documents	Add Delete
Creating Book Titles	How to Create and Manage Books	Add Delete
Creating Chapters	How to Create Manage Chapters	Add Delete
Creating Procedures	How to Create Procedures	Add Delete

Selected

[Search](#) [Add](#)

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

Corporate Intelligence System

Home ?

Ask for Help...

Screen Name SN_Book

Description SN_Book

Chat with Me

Book loaded. You can now edit the details and click Save.

File
Books
Manuals
Screens
Procedure
Word
Ingest
Chat
Other
Utilities
Admin

Chapters
Documents
Documents
Control
Documents
With Me
Functions

You may Define new Book Title Change a Book Title or Delete a book title
Change Book will change bookname in Chapter and Screen Document Table
Delete Book will set to Unassigned Book Name in Chapter and Screen Document table

+ Add

View	Delete	BookNumber	BookName	Editor	LastDate
View	Delete	1.000	Operating Manual	ivan	2026-02-25 17:52:35

Save
Cancel

BookNumber 1.000
BookName Operating Manual

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

Corporate Intelligence System

Home Screen Help ?

Search Manual for Help

Screen Name: SN_Chapter

Description: SN_Chapter

Chat with Me

File Chat With Me Books Chapters Screens Documents Procedure Documents Book Viewing Ingest Documents AI Control Search Control Utilities

Manual Chapters

Use this screen to add, view, update, and delete chapters for a selected book. Chapters are identified by BookName + ChapterName. ChapterNumber must be entered in 000.000 format.

BookName: Operating Manual

Select

+ Add

View	Delete	BookName	ChapterNumber	ChapterName	Placement	ReadFrom	Editor	LastDate
		Operating Manual	1.000	Foundations of ...	M	Both	ivan	2026-04-28 17:0...
		Operating Manual	2.000	Using the Corpo...	M	Both	ivan	2026-04-28 17:2...
		Operating Manual	100.000	Managing Book...	M	Both	ivan	2026-03-02 23:0...
		Operating Manual	200.000	Generating Books	M	Both	ivan	2026-03-03 07:0...
		Operating Manual	300.000	Procedures Boo...	M	Both	ivan	2026-03-06 19:4...

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

Home ?

Ask for Help...

Chat with Me

Screen Name

SN_Screen

Description

SN_Screen

File

Books Chapters

Screens Documents

Procedure Documents

Book Viewing

Word Control

Ingest Documents

Chat With Me

Other Functions

Utilities

Admin

Please Review the Security Group Numbers when Assigning to Screens

NOTE: Applying the most relevant metadata and keywords will significantly improve the AI Chat Agent responses to the client

Security Groups

Click to Update

Group #	Group Name	Sel
1	Menus	
2	Books	
3	Chapters	
4	Docs and Screens	

Screens Assigned to Groups

BookName Operating Manual

Select

Screen Name	Description	Actions
SN_IngestEmail	Load Emails into the System	
SN_IngestKnowNote	Load Notes for AI Chat	
SN_IngestLetter	Load Letters Memos	
SN_IngestPDFDOCXRTF	Load Documents Books Manuals	

Selected Screen: SN_IngestEmail

Srch> SN_Ing

Search

Add

Save Cancel

Book Name: Operating Manual

Screen Name: SN_IngestEmail

Security Group Number: 21

Screen Description: Load Emails into the System

Doc Type: SCREEN_DOCUMENT

Audience: BOTH

Chapter Name: Loading Documents for Intelligent Chat Retrieval

Section Number: 100.000

Section Name: Loading Emails for Chat Agent

Help Mode: HTML

Screen Help:

<div class="manual-section">

<h2>100.000 Loading Emails for Chat Agent</h2>

<h3>Purpose</h3>

<p>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.</p>

<p>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.</p>

<p>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.</p>

<p>Supported upload type is EML.</p>

<p>The maximum upload size for this screen is 10 KB per file.</p>

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

<p>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.</p>

<h3>Processing</h3>

<p>This screen has two main paths.</p>

<p>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.</p>

Figure: Screen Detail Area.

Corporate Intelligence System

Home ?

Ask for Help...

Chat with Me

Screen Name

SN_Screen

Description

SN_Screen

Index reindex OK. Processed=0 Skipped=1 Postings=0
Screen processed successfully.
Save OK.

File
Books Chapters
Screens Documents
Procedure Documents
Book Viewing
Word Control
Ingest Documents
Chat With Me
Other Functions
Utilities
Admin

Chunk Database Preparation

We have completed the parsing of the document and we are ready to prepare this parsing and prepare the database so the ai chat agent can use this data press below to start this process

Process for DB

Please Review the Security Group Numbers when Assigning to Screens

NOTE: Applying the most relevant metadata and keywords will significantly improve the AI Chat Agent responses to the client

Security Groups

Click to Update

Group #	Group Name	Sel
1	Menus	
2	Books	
3	Chapters	
4	Docs and Screens	

Screens Assigned to Groups

BookName Operating Manual

Select

Screen Name	Description	Actions
SN_IngestEmail	Load Emails into the System	
SN_IngestKnowNote	Load Notes for AI Chat	
SN_IngestLetter	Load Letters Memos	
SN_IngestPDFDOCXRTF	Load Documents Books Manuals	

Selected Screen: SN_IngestEmail
Srch> SN_IN
Search
Add

Figure: Chunk Processing for Screen Help.

Corporate Intelligence System

Ask for Help...

Chat with Me

Home ?

Screen Name: SN_Screen

Description: SN_Screen

Chunk processing completed successfully. You may now build vectors.

File
Books
Chapters
Screens
Documents
Procedure
Documents
Book
Viewing
Word
Control
Ingest
Documents
Chat
With Me
Other
Functions
Utilities
Admin

Vector Preparation

The database has been prepared now we need to vector the data so that the ai chat agent can evaluate relevant data to a user request
press below to start this process

[Process for Vector](#)

Please Review the Security Group Numbers when Assigning to Screens

NOTE: Applying the most relevant metadata and keywords will significantly improve the AI Chat Agent responses to the client

Security Groups

Click to Update

Group #	Group Name	Sel
1	Menus	☐
2	Books	☐
3	Chapters	☐
4	Docs and Screens	☐

Screens Assigned to Groups

BookName: Operating Manual [Select](#)

Screen Name	Description	Actions
SN_IngestEmail	Load Emails into the System	☐ ☐ ☐
SN_IngestKnowNote	Load Notes for AI Chat	☐ ☐ ☐
SN_IngestLetter	Load Letters Memos	☐ ☐ ☐
SN_IngestPDFDOCXRTF	Load Documents Books Manuals	☐ ☐ ☐

Selected Screen: SN_IngestEmail Srch> SN_IN [Search](#) [Add](#)

[Save](#) [Cancel](#)

Book Name: Operating Manual

Screen Name: SN_IngestEmail

Security Group Number: 21

Screen Description: Load Emails into the System

Doc Type: SCREEN_DOCUMENT

Audience: BOTH

Chapter Name: Loading Documents for Intelligent Chat Retrieval

Section Number: 100.000

Section Name: Loading Emails for Chat Agent

Help Mode: HTML

Screen Help:

```

<div class="manual-section">
<h2><strong>100.000 Loading Emails for Chat Agent</strong></h2>
<h3>Purpose</h3>
<p>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.</p>
<p>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.</p>
<p>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.</p>
<p>Supported upload type is EML.</p>
<p>The maximum upload size for this screen is 10 KB per file.</p>
<p>The screen also supports direct typed or pasted email content through Add New without requiring an uploaded EML file.</p>
<p>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.</p>
<h3>Processing</h3>
<p>This screen has two main paths.</p>
<p>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.</p>

```

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

Corporate Intelligence System

Home ?

Ask for Help...

Screen Name: SN_ManualGen

Description: SN_ManualGen

Chat with Me

File Books Screens Procedure Documents Manuals Word Control Ingest Documents Chat With Me Other Functions Utilities Admin

Book Generation

This process will build the selected book as a PDF and replace the existing file at `/manual/BookName.pdf`.

Select a book name, then click **Generate Book**. When the process completes, statistics will be provided including the number of **chapters**, **sections**, and **pages** generated.

Select BookName: Operating Manual

Generate Book

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

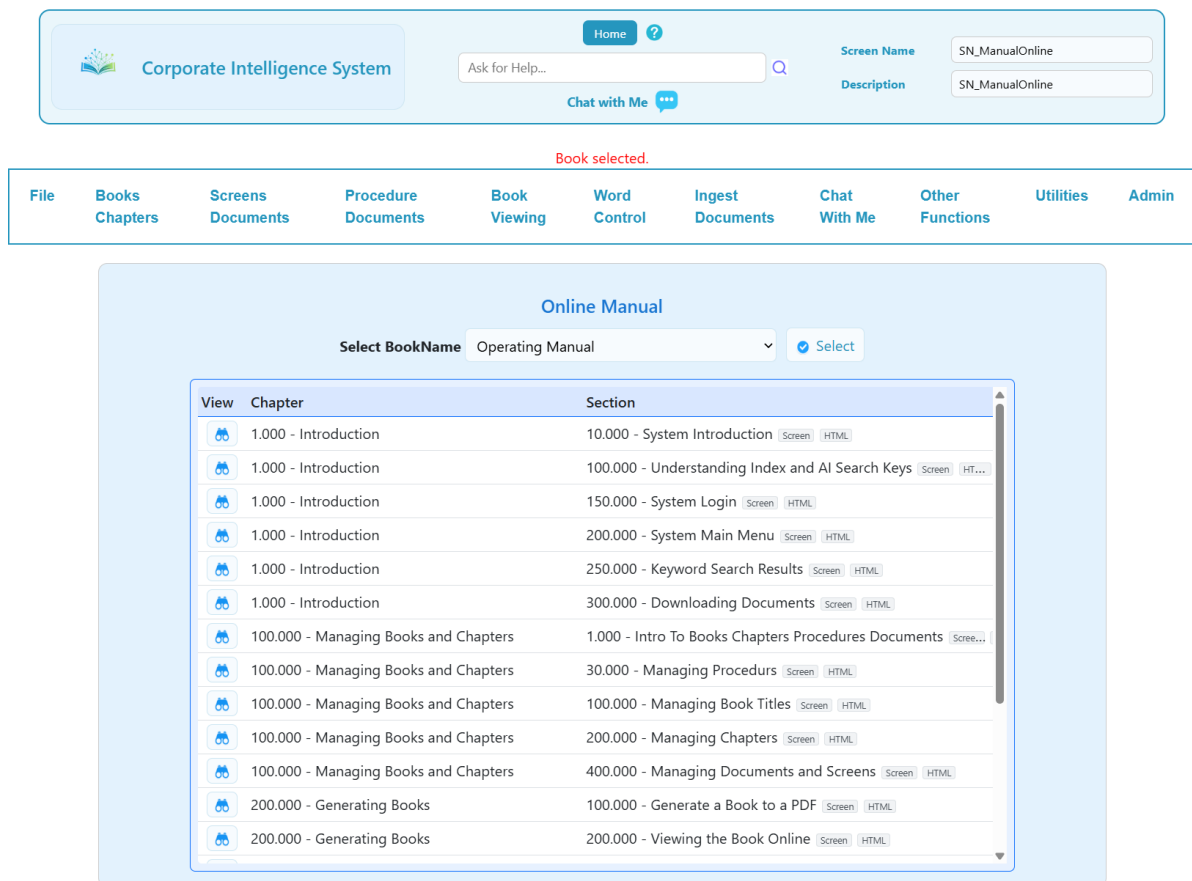
Purpose

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

 Corporate Intelligence System

[Home](#) 



[Chat with Me](#) 

Screen Name

SN_ManualDownload

Description

SN_ManualDownload

File

Books
Chapters

Screens
Documents

Procedure
Documents

Book
Viewing

Word
Control

Ingest
Documents

Chat
With Me

Other
Functions

Utilities

Admin

Book Download

Select a book name, then click **Select**. After selection, click **Download Book** to open the PDF from `/manual/BookName.pdf`.

Select BookName

Operating Manual

 Download Book

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

Corporate Intelligence System

Home ?

Ask for Help...

Screen Name
SN_IngestKnowNote

Description
SN_IngestKnowNote

Chat with Me

File
Books
Chapters
Screens
Documents
Procedure
Documents
Book
Viewing
Word
Control
Ingest
Documents
Chat
With Me
Other
Functions
Utilities
Admin

Knowledge Note Ingest for AI Chat Agent

Use this function to enter a knowledge note the author wants immortalized for future AI Chat Agent retrieval and response. A good knowledge note should capture durable business knowledge such as rules, procedures, decisions, constraints, lessons learned, definitions, standards, or important operational guidance. Enter a clear subject, business domain, audience, and note content so the system can preserve the meaning and prepare the note for AI processing and retrieval. The note content should focus on reusable knowledge rather than casual conversation or temporary commentary. Use the Search pane to locate existing knowledge notes to Delete.

NOTE: Applying a clear subject and accurate description will significantly improve AI Chat Agent responses.

Knowledge notes should generally remain concise and focused. If the content becomes document-sized, use the Document Ingest process instead.

If you receive an error, refer to the documentation using the > next to the Home button.

Selector

Action

Unassigned

Apply Selection

Select

Press Select when done.

Figure: Main Note Ingest Screen.



Corporate Intelligence System

Home ?

Ask for Help...

Chat with Me

Screen Name

SN_IngestKnowNote

Description

SN_IngestKnowNote

File

Books
Chapters

Screens
Documents

Procedure
Documents

Book
Viewing

Word
Control

Ingest
Documents

Chat
With Me

Other
Functions

Utilities

Admin

Knowledge Note Ingest for AI Chat Agent

Use this function to enter a knowledge note the author wants immortalized for future AI Chat Agent retrieval and response. A good knowledge note should capture durable business knowledge such as rules, procedures, decisions, constraints, lessons learned, definitions, standards, or important operational guidance. Enter a clear subject, business domain, audience, and note content so the system can preserve the meaning and prepare the note for AI processing and retrieval. The note content should focus on reusable knowledge rather than casual conversation or temporary commentary. Use the Search pane to locate existing knowledge notes to Delete.
NOTE: Applying a clear subject and accurate description will significantly improve AI Chat Agent responses.
Knowledge notes should generally remain concise and focused. If the content becomes document-sized, use the Document Ingest process instead.
If you receive an error, refer to the documentation using the > next to the Home button.

Selector

Action

Search to Delete

Apply Selection

Select

Press Select when done.

Date From

01/01/2026

Date To

12/01/2026

Any Text

policy

Search

Reset

Actions	DocumentID	Date	Display Name	Description	Subject	Author
Delete	14	04/11/2026	Desktop Software Pol...	This note is describing a p...	Policy Change for De...	Ivan Rodriguez

Figure: Search for Delete.

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Home ?

Ask for Help...

Chat with Me

Screen Name

SN_IngestKnowNote

Description

SN_IngestKnowNote

File

Books Chapters

Screens Documents

Procedure Documents

Book Viewing

Word Control

Ingest Documents

Chat With Me

Other Functions

Utilities

Admin

Knowledge Note Ingest for AI Chat Agent

Use this function to enter a knowledge note the author wants immortalized for future AI Chat Agent retrieval and response. A good knowledge note should capture durable business knowledge such as rules, procedures, decisions, constraints, lessons learned, definitions, standards, or important operational guidance. Enter a clear subject, business domain, audience, and note content so the system can preserve the meaning and prepare the note for AI processing and retrieval. The note content should focus on reusable knowledge rather than casual conversation or temporary commentary. Use the Search pane to locate existing knowledge notes to Delete.

NOTE: Applying a clear subject and accurate description will significantly improve AI Chat Agent responses.

Knowledge notes should generally remain concise and focused. If the content becomes document-sized, use the Document Ingest process instead.

If you receive an error, refer to the documentation using the > next to the Home button.

Selector

Action

Add New

Apply Selection

Select

Press Select when done.

Save

Clear

Knowledge Note Entry

Document Format

KNOWLEDGE_ENTRY

Audience

Unassigned

Display Name

Date

04/11/2026

Author

Subject

Knowledge Note Text

Business Domain

Unassigned

Document Description

Enter the permanent knowledge, rule, lesson learned, decision, process, or guidance you want preserved for future AI retrieval.

Describe what knowledge this note preserves, why it matters, and when it should be used. Strong descriptions improve AI search and answer quality.

This entry will be transformed into a structured knowledge note using AUTHOR; SUBJECT; DATE; DESCRIPTION; and BUSINESSDOMAIN: headers, then prepared for AI indexing, chunking, keyword extraction, and future retrieval.

Figure: Detail Screen.



Corporate Intelligence System

Home ?

Ask for Help...

Chat with Me

Screen Name

SN_IngestKnowNote

Description

SN_IngestKnowNote

NOTE PROCESSED SUCCESSFULLY

File

Books
Chapters

Screens
Documents

Procedure
Documents

Book
Viewing

Word
Control

Ingest
Documents

Chat
With Me

Other
Functions

Utilities

Admin

Chunk Database Preparation

We have completed the parsing of the document and we are ready to prepare this parsing and prepare the database so the ai chat agent can use this data press below to start this process

Process for DB

Knowledge Note Ingest for AI Chat Agent

Use this function to enter a knowledge note the author wants immortalized for future AI Chat Agent retrieval and response. A good knowledge note should capture durable business knowledge such as rules, procedures, decisions, constraints, lessons learned, definitions, standards, or important operational guidance. Enter a clear subject, business domain, audience, and note content so the system can preserve the meaning and prepare the note for AI processing and retrieval. The note content should focus on reusable knowledge rather than casual conversation or temporary commentary. Use the Search pane to locate existing knowledge notes to Delete.
NOTE: Applying a clear subject and accurate description will significantly improve AI Chat Agent responses.
Knowledge notes should generally remain concise and focused. If the content becomes document-sized, use the Document Ingest process instead.
If you receive an error, refer to the documentation using the > next to the Home button.

Selector

Action

Add New

Apply Selection

Select

Press Select when done.

Figure: Commit Parse to Database Chunks.

Home ?

Ask for Help...

Chat with Me

Screen Name

SN_IngestKnowNote

Description

SN_IngestKnowNote

Chunk processing completed successfully. You may now build vectors.

File

Books
Chapters

Screens
Documents

Procedure
Documents

Book
Viewing

Word
Control

Ingest
Documents

Chat
With Me

Other
Functions

Utilities

Admin

Vector Preparation

The database has been prepared now we need to vector the data so that the ai chat agent can evaluate relevant data to a user request
press below to start this process

Process for Vector

Knowledge Note Ingest for AI Chat Agent

Use this function to enter a knowledge note the author wants immortalized for future AI Chat Agent retrieval and response. A good knowledge note should capture durable business knowledge such as rules, procedures, decisions, constraints, lessons learned, definitions, standards, or important operational guidance. Enter a clear subject, business domain, audience, and note content so the system can preserve the meaning and prepare the note for AI processing and retrieval. The note content should focus on reusable knowledge rather than casual conversation or temporary commentary. Use the Search pane to locate existing knowledge notes to Delete.
NOTE: Applying a clear subject and accurate description will significantly improve AI Chat Agent responses.
Knowledge notes should generally remain concise and focused. If the content becomes document-sized, use the Document Ingest process instead.
If you receive an error, refer to the documentation using the > next to the Home button.

Selector

Action

Add New

Apply Selection

Select

Press Select when done.

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.

Document Category provides a broad classification for the document and helps organize similar content together. Examples include Policy, Procedure, Manual, Standard, Training, Report, Contract, Reference, and Compliance.

Document Subject identifies the primary topic of the document. Use a clear business description rather than a short code. Examples include Tenant Move In Procedures, Monthly Financial Reporting, Vendor Approval Process, Work Order Management, and Employee Onboarding.

Search Keyword 1, Search Keyword 2, and Search Keyword 3 provide additional search terms that users may enter when looking for the document. Think about the words someone would naturally type into a search box. Examples include Accounting, General Ledger, Month End, Payroll, Tenant, Lease, Inventory, Warehouse, Procurement, Vendor, Compliance, Safety, and Training.

Physical Location is optional and may be used when a paper copy, binder, file cabinet, records box, or other physical document storage location exists. Examples include Accounting Cabinet A Drawer 3, Records Room Box 14, Operations Binder 5, and Human Resources Shelf 2. Leave this field blank if no physical copy exists.

These fields are primarily used by the Document Search and Document Management functions. Completing them consistently makes documents easier to locate, organize, filter, review, and maintain as the document library grows.

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

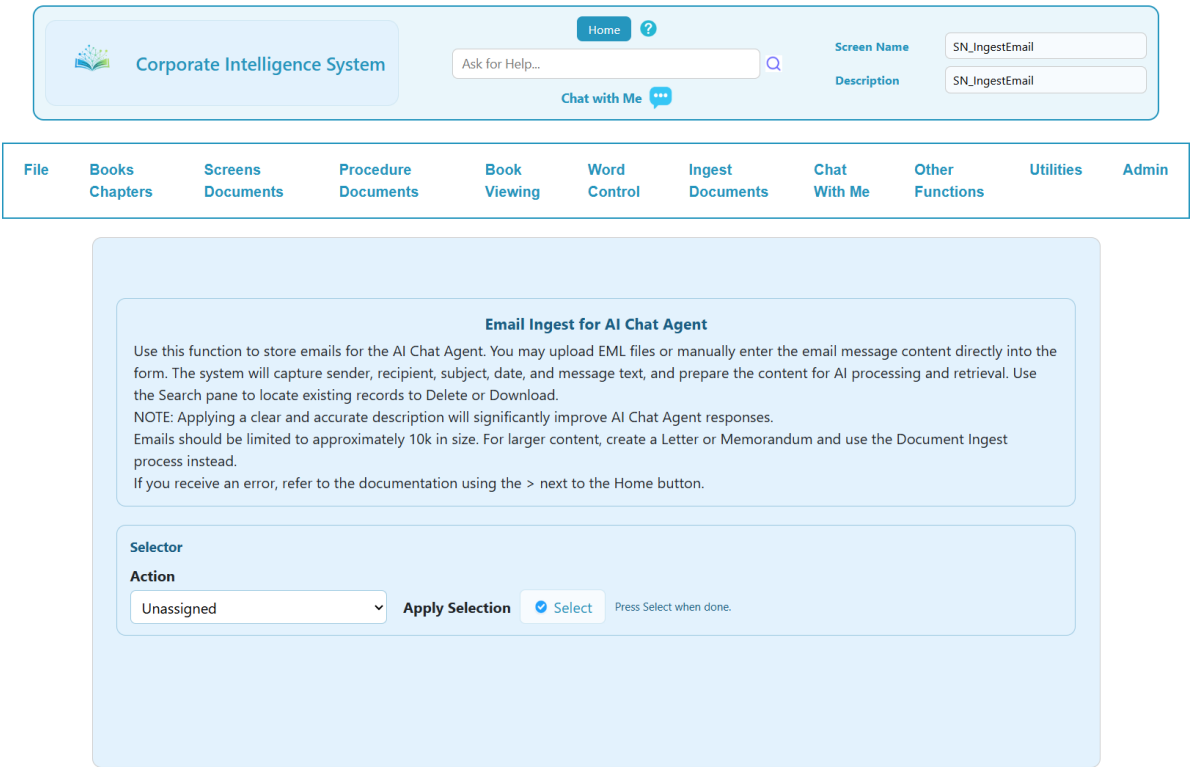


Figure: Main Email Ingest Screen.

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

Admin

Email Ingest for AI Chat Agent

Use this function to store emails for the AI Chat Agent. You may upload EML files or manually enter the email message content directly into the form. The system will capture sender, recipient, subject, date, and message text, and prepare the content for AI processing and retrieval. Use the Search pane to locate existing records to Delete or Download.

NOTE: Applying a clear and accurate description will significantly improve AI Chat Agent responses. Emails should be limited to approximately 10k in size. For larger content, create a Letter or Memorandum and use the Document Ingest process instead.

If you receive an error, refer to the documentation using the > next to the Home button.

Selector

Action

Search to Delete

Apply Selection

Select

Press Select when done.

Date From

01/01/2026

Date To

12/01/2026

Any Text

a

Search

Reset

Actions	DocumentID	Date	Display Name	Description	Book Name	Chapter N:
Delete Download	11		Justification for Cust...	This document is a memor...	Justification for Cu...	
Delete Download	10		Justification for Cust...	This file is a businessmemo...	Justification for Cu...	
Delete Download	9		Network Proposal	This file is a business letter ...	Network Proposal	

Figure: Search for Delete Download.

Home ?

Ask for Help...

Chat with Me

Screen Name

SN_IngestEmail

Description

SN_IngestEmail

File

Books Chapters

Screens Documents

Procedure Documents

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Word Control

Ingest Documents

Chat With Me

Other Functions

Utilities

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Email Ingest for AI Chat Agent

Use this function to store emails for the AI Chat Agent. You may upload EML files or manually enter the email message content directly into the form. The system will capture sender, recipient, subject, date, and message text, and prepare the content for AI processing and retrieval. Use the Search pane to locate existing records to Delete or Download.

NOTE: Applying a clear and accurate description will significantly improve AI Chat Agent responses. Emails should be limited to approximately 10k in size. For larger content, create a Letter or Memorandum and use the Document Ingest process instead.

If you receive an error, refer to the documentation using the > next to the Home button.

Selector

Action

Upload EML File

Apply Selection

Select

Press Select when done.

Select File

Choose File

SSL Notice_Changes A...Authentication EKU.eml

Upload

Allowed file types:EML

Figure: Upload EML File.

 Corporate Intelligence System

[Home](#) ?

Ask for Help...

Chat with Me

Screen Name
SN_IngestEmail

Description
SN_IngestEmail

A total of 7 HTML markers were removed.

File

Books
Chapters

Screens
Documents

Procedure
Documents

Book
Viewing

Word
Control

Ingest
Documents

Chat
With Me

Other
Functions

Utilities

Admin

Email Ingest for AI Chat Agent

Use this function to store emails for the AI Chat Agent. You may upload EML files or manually enter the email message content directly into the form. The system will capture sender, recipient, subject, date, and message text, and prepare the content for AI processing and retrieval. Use the Search pane to locate existing records to Delete or Download.

NOTE: Applying a clear and accurate description will significantly improve AI Chat Agent responses. Emails should be limited to approximately 10k in size. For larger content, create a Letter or Memorandum and use the Document Ingest process instead.

If you receive an error, refer to the documentation using the > next to the Home button.

Selector

Action

Upload EML File

Apply Selection

Select

Press Select when done.

Select File

Choose File

No file chosen

Upload

Allowed file types:EML

Uploaded File: SSL_Notice_Changes_Affecting_Client_Authentication_EKU_20260411_145648.eml

Save

Clear

Letter and Memo Guidance

Document Format	EMAIL_THREAD	Audience	Unassigned
Display Name	SSL Notice: Changes Affecting Client Auti	Document Date	2026-04-08 12:40:15
Recipient	rodriguez7699@gmail.com	Sender	support@namecheap.com
Subject	SSL Notice: Changes Affecting Client Authentication EKU		
Business Domain	Cybersecurity		
Business Domain	Or enter custom Business Domain		
Business Domain	Select from the list or type a custom Business Domain.		
Email Message Text	- Move to a Private PKI solution, or - Update your systems to stop requiring the Client Auth EKU. Sectigo offers Private PKI options that fully support mTLS and Client Authentication. These must be purchased directly from Sectigo, as they are not available through Namecheap. Copy Text		
Document Description	Type the email message here or load it from the converted uploaded .eml file. This file is an email communication intended to capture the full content of an electronic message, including sender, recipient(s), subject, date, and the complete message body. It may also reflect reply chains, forwarded content, or threaded discussions. The purpose is to preserve email context, communication flow, decisions, and intent, enabling accurate search, retrieval, and analysis of correspondence history Be very descriptive. This guides the AI chat agent in understanding the content and improves retrieval quality. SAMPLE DESCRIPTION: This file is an email communication intended to capture the full content of an electronic message, including sender, recipient(s), subject, date, and the complete message body. It may also reflect reply chains, forwarded content, or threaded discussions. The purpose is to preserve email context, communication flow, decisions, and intent, enabling accurate search, retrieval, and analysis of correspondence history.		

Figure: Detail Screen.

Corporate Intelligence System

Home ?

Ask for Help...

Chat with Me

Screen Name

SN_IngestEmail

Description

SN_IngestEmail

Email processed successfully.

File

Books Chapters

Screens Documents

Procedure Documents

Book Viewing

Word Control

Ingest Documents

Chat With Me

Other Functions

Utilities

Admin

Chunk Database Preparation

We have completed the parsing of the document and we are ready to prepare this parsing and prepare the database so the ai chat agent can use this data press below to start this process

Process for DB

Email Ingest for AI Chat Agent

Use this function to store emails for the AI Chat Agent. You may upload EML files or manually enter the email message content directly into the form. The system will capture sender, recipient, subject, date, and message text, and prepare the content for AI processing and retrieval. Use the Search pane to locate existing records to Delete or Download.

NOTE: Applying a clear and accurate description will significantly improve AI Chat Agent responses.

Emails should be limited to approximately 10k in size. For larger content, create a Letter or Memorandum and use the Document Ingest process instead.

If you receive an error, refer to the documentation using the > next to the Home button.

Selector

Action

Upload EML File

Apply Selection

Select

Press Select when done.

Select File

Choose File

No file chosen

Upload

Allowed file types:EML

Uploaded File: SSL_Notice_Changes_Affecting_Client_Authentication_EKU_20260411_154405.eml

Figure: Commit Parse to Database Chunks.

Home ?

Ask for Help...

Chat with Me

Screen Name

SN_IngestEmail

Description

SN_IngestEmail

Chunk processing completed successfully. You may now build vectors.

File

Books Chapters

Screens Documents

Procedure Documents

Book Viewing

Word Control

Ingest Documents

Chat With Me

Other Functions

Utilities

Admin

Vector Preparation

The database has been prepared now we need to vector the data so that the ai chat agent can evaluate relevant data to a user request press below to start this process

Process for Vector

Email Ingest for AI Chat Agent

Use this function to store emails for the AI Chat Agent. You may upload EML files or manually enter the email message content directly into the form. The system will capture sender, recipient, subject, date, and message text, and prepare the content for AI processing and retrieval. Use the Search pane to locate existing records to Delete or Download.

NOTE: Applying a clear and accurate description will significantly improve AI Chat Agent responses.

Emails should be limited to approximately 10k in size. For larger content, create a Letter or Memorandum and use the Document Ingest process instead.

If you receive an error, refer to the documentation using the > next to the Home button.

Selector

Action

Upload EML File

Apply Selection

Select

Press Select when done.

Select File

Choose File

No file chosen

Upload

Allowed file types:EML

Uploaded File: SSL_Notice_Changes_Affecting_Client_Authentication_EKU_20260411_154659.eml

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

Home ?

Ask for Help...

Chat with Me

Screen Name

SN_IngestPDFDOCXRTF

Description

SN_IngestPDFDOCXRTF

File

Books
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Viewing

Word
Control

Ingest
Documents

Chat
With Me

Other
Functions

Utilities

Admin

Load Manuals Books Documents

Upload DOCX PDF RFT files to ingest Books Manuals Documents into the AI knowledge system. It will Extract Chunks of Data and prepare them for AI Chat Agent Use the Search pane to locate existing records to Delete. To Load new books manuals documents identify the types below.
NOTE: Applying the best description of the document will significantly improve the AI Chat Agent responses to the client if you receive a timeout message or a error of Limit Incomplete or Error refer the the documentation - Press the > next to Home button for instructions. Large Documents can take from 2 to 60 minutes depending on size to process do not press Save again wait for a message to appear at the top of the screen. Documents more than 10k characters will be divided into multiple Parse runs.

Selector

Action

Search to Delete

Apply Selection

Select

Press Select when done.

Date From

01/01/2026

Date To

12/01/2026

Any Text

a

Search

Reset

Actions	DocumentID	Date	Display Name	Description	Book Name
Delete Download	9	04/03/2026	City Standard Operating M...	his document is a structured City...	City Standard O...

Figure: Search for Delete Download.

Operating Manual



Corporate Intelligence System

Home ?

Ask for Help...

Chat with Me

Screen Name

SN_IngestPDFDOCXRTF

Description

SN_IngestPDFDOCXRTF

A total of 821 HTML markers were removed.

Your upload was divided into 16 files for processing. You will likely need about 1 resume step to finish processing this document. Estimated total processing time is about 10.95885 minutes.

File

Books Chapters

Screens Documents

Procedure Documents

Book Viewing

Word Control

Ingest Documents

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Other Functions

Utilities

Admin

Load Manuals Books Documents

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Selector

Action

Add New

Apply Selection

Select

Press Select when done.

Select File

Choose File

No file chosen

Upload

Allowed file types: PDF, DOCX, RTF

Uploaded File: bcsd_sop_08-16-16_20260403_171315.pdf

Save

Clear

API Guidance

Document Format

PDF_DOCUMENT

Expected Class

Unassigned

Display Name

Unassigned

Business Domain

Or enter custom Business Domain

Document Description

Document Mode

Unassigned

Audience

Unassigned

Page Count

Be very descriptive. This guides the AI chat agent in understanding the content and improves retrieval quality.
SAMPLE DESCRIPTION: This document is a structured guide intended to define standards, processes, and operational rules within a specific business domain. It includes sections covering responsibilities, workflows, compliance requirements, and execution procedures. It is designed to support internal reference, training, and consistent application of business practices.

Figure: Upload File.

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Operating Manual

**Corporate Intelligence System**

Home ?

Ask for Help...

Chat with Me

Screen Name

SN_IngestPDFDOCXRTF

Description

SN_IngestPDFDOCXRTF

A total of 821 HTML markers were removed.

Your upload was divided into 16 files for processing. You will likely need about 1 resume step to finish processing this document. Estimated total processing time is about 10.95885 minutes.

File

Books Chapters

Screens Documents

Procedure Documents

Book Viewing

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Admin

Load Manuals Books Documents

Upload DOCX PDF RFT files to ingest Books Manuals Documents into the AI knowledge system. It will Extract Chunks of Data and prepare them for AI Chat Agent Use the Search pane to locate existing records to Delete. To Load new books manuals documents identify the types below.
NOTE: Applying the best description of the document will significantly improve the AI Chat Agent responses to the client if you receive a timeout message or a error of Limit Incomplete or Error refer the the documentation - Press the > next to Home button for instructions. Large Documents can take from 2 to 60 minutes depending on size to process do not press Save again wait for a message to appear at the top of the screen. Documents more than 10k characters will be divided into multiple Parse runs.

Selector

Action

Add New

Apply Selection

Select

Press Select when done.

Select File

Choose File

No file chosen

Upload

Allowed file types: PDF, DOCX, RTF

Uploaded File: bcsd_sop_08-16-16_20260403_204554.pdf

Save

Clear

API Guidance

Document Format

PDF_DOCUMENT

Expected Class

Manual

Display Name

City Standard Operating Manual

Business Domain

Or enter custom Business Domain

Document Description

This document is a structured City Standard Operating Manual intended to define standards, processes, and operational rules within a specific business domain. It includes sections covering responsibilities, workflows, compliance requirements, and execution procedures. It is designed to support internal reference, training, and consistent application of business practices.

Document Mode

Manual

Audience

Both

Page Count

120

Be very descriptive. This guides the AI chat agent in understanding the content and improves retrieval quality.

SAMPLE DESCRIPTION: This document is a structured guide intended to define standards, processes, and operational rules within a specific business domain. It includes sections covering responsibilities, workflows, compliance requirements, and execution procedures. It is designed to support internal reference, training, and consistent application of business practices.

Figure: Detail Screen.

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Home ?

Ask for Help...

Chat with Me

Screen Name

SN_IngestPDFDOCXRTF

Description

SN_IngestPDFDOCXRTF

Batch limit reached. Additional files remain to be parsed.

File

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Resume Document Parsing

We are processing multiple files created from your uploaded document. This parse batch stopped after 7 file(s) in the current request. Additional files remain. Click Resume to continue parsing the next group of files.

File Processing Status

7 of 16 files processed so far, 9 files remaining.

Estimated time remaining: about 6 minutes.

Estimated total parsing time: about 10 minutes.

Resume continues processing the next prepared file from your original upload.

Commit to Database saves everything parsed so far to the database and stops further file processing.

Abort stops processing and abandons the remaining files from this original upload.

Resume

Commit to Database

Abort

Load Manuals Books Documents

Upload DOCX PDF RFT files to ingest Books Manuals Documents into the AI knowledge system. It will Extract Chunks of Data and prepare them for AI Chat Agent Use the Search pane to locate existing records to Delete. To Load new books manuals documents identify the types below.

NOTE: Applying the best description of the document will significantly improve the AI Chat Agent responses to the client if you receive a timeout message or a error of Limit Incomplete or Error refer the the documentation - Press the > next to Home button for instructions. Large Documents can take from 2 to 60 minutes depending on size to process do not press Save again wait for a message to appear at the top of the screen. Documents more than 10k characters will be divided into multiple Parse runs.

Selector

Action

Add New

Apply Selection

Select

Press Select when done.

Select File

Choose File

No file chosen

Upload

Allowed file types: PDF, DOCX, RTF

Uploaded File: bcsd_sop_08-16-16_20260403_171315.pdf

Figure: Resume Parsing.

Home ?

Ask for Help...

Chat with Me

Screen Name

SN_IngestPDFDOCXRTF

Description

SN_IngestPDFDOCXRTF

All converted files were parsed successfully.

File

Books Chapters

Screens Documents

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Utilities

Admin

Chunk Database Preparation

We have completed the parsing of the document and we are ready to prepare this parsing and prepare the database so the ai chat agent can use this data press below to start this process

Process for DB

Load Manuals Books Documents

Upload DOCX PDF RFT files to ingest Books Manuals Documents into the AI knowledge system. It will Extract Chunks of Data and prepare them for AI Chat Agent Use the Search pane to locate existing records to Delete. To Load new books manuals documents identify the types below.

NOTE: Applying the best description of the document will significantly improve the AI Chat Agent responses to the client if you receive a timeout message or a error of Limit Incomplete or Error refer the the documentation - Press the > next to Home button for instructions. Large Documents can take from 2 to 60 minutes depending on size to process do not press Save again wait for a message to appear at the top of the screen. Documents more than 10k characters will be divided into multiple Parse runs.

Selector

Action

Add New

Apply Selection

Select

Press Select when done.

Select File

Choose File

No file chosen

Upload

Allowed file types: PDF, DOCX, RTF

Uploaded File: bcsd_sop_08-16-16_20260403_171315.pdf

Figure: Commit Parse to Database Chunks.

Corporate Intelligence System

[Home](#)
[Screen Help ?](#)

Screen Name

Description

[Chat with Me](#)

Chunk processing completed successfully. You may now build vectors.

[File](#)
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[Book Viewing](#)
[Ingest Documents](#)
[AI Control](#)
[Search Control](#)
[Utilities](#)

Vector Preparation

The database has been prepared now we need to vector the data so that the ai chat agent can evaluate relevant data to a user request press below to start this process

Load Manuals Books Documents

Upload DOCX PDF RFT files to ingest Books Manuals Documents into the AI knowledge system. It will Extract Chunks of Data and prepare them for AI Chat Agent Use the Search pane to locate existing records to Delete. To Load new books manuals documents identify the types below.

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Selector

Action

Press Select when done.

Select File

Allowed file types: PDF, DOCX, RTF

Uploaded File: SHRM-Sample-Employee-Handbook-2023_20260430_114327.docx

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 Category provides a broad classification for the document and helps organize similar content together. Examples include Policy, Procedure, Manual, Standard, Training, Report, Contract, Reference, and Compliance.

Document Subject identifies the primary topic of the document. Use a clear business description rather than a short code. Examples include Tenant Move In Procedures, Monthly Financial Reporting, Vendor Approval Process, Work Order Management, and Employee Onboarding.

Search Keyword 1, Search Keyword 2, and Search Keyword 3 provide additional search terms that users may enter when looking for the document. Think about the words someone would naturally type into a search box. Examples include Accounting, General Ledger, Month End, Payroll, Tenant, Lease, Inventory, Warehouse, Procurement, Vendor, Compliance, Safety, and Training.

Physical Location is optional and may be used when a paper copy, binder, file cabinet, records box, or other physical document storage location exists. Examples include Accounting Cabinet A Drawer 3, Records Room Box 14, Operations Binder 5, and Human Resources Shelf 2. Leave this field blank if no physical copy exists.

These fields are primarily used by the Document Search and Document Management functions. Completing them consistently makes documents easier to locate, organize, filter, review, and maintain

as the document library grows.

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.

Document Category provides a broad classification for the document and helps organize similar content together. Examples include Policy, Procedure, Manual, Standard, Training, Report, Contract, Reference, and Compliance.

Document Subject identifies the primary topic of the document. Use a clear business description rather than a short code. Examples include Tenant Move In Procedures, Monthly Financial Reporting, Vendor Approval Process, Work Order Management, and Employee Onboarding.

Search Keyword 1, Search Keyword 2, and Search Keyword 3 provide additional search terms that users may enter when looking for the document. Think about the words someone would naturally type into a search box. Examples include Accounting, General Ledger, Month End, Payroll, Tenant, Lease, Inventory, Warehouse, Procurement, Vendor, Compliance, Safety, and Training.

Physical Location is optional and may be used when a paper copy, binder, file cabinet, records box, or other physical document storage location exists. Examples include Accounting Cabinet A Drawer 3, Records Room Box 14, Operations Binder 5, and Human Resources Shelf 2. Leave this field blank if no physical copy exists.

These fields are primarily used by the Document Search and Document Management functions. Completing them consistently makes documents easier to locate, organize, filter, review, and maintain as the document library grows.

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...

Screen Name
SN_IngestEmail

Description
SN_IngestEmail

Chat with Me

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 Select - Add Value - Press Move To

Available Meta Keys:

ActionRequired
Actions
ApprovalType
ApproverName
Author
AuthorityLevel
ComplianceTopic
Confidentiality

Select

Selected

Value

Move To

Remove

Cancel

Selected Meta Data:

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

Select

Selected

Move To

Remove

Cancel

Selected Keywords:

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.

Corporate Intelligence System

Home ?

Ask for Help...

Chat with Me

Screen Name

SN_IngestLetter

Description

SN_IngestLetter

File

Books
Chapters

Screens
Documents

Procedure
Documents

Book
Viewing

Word
Control

Ingest
Documents

Chat
With Me

Other
Functions

Utilities

Admin

Load Manuals Books Documents

Upload DOCX PDF RFT files to ingest Letters and Interoffice Memos into the AI knowledge system. It will Extract Chunks of Data and prepare them for AI Chat Agent Use the Search pane to locate existing records to Delete or Download. To Load new Letters or Interoffice Memos identify the types below.
NOTE: Applying the best description of the document will significantly improve the AI Chat Agent responses to the client if you receive a timeout message or a error of Limit Incomplete or Error refer the the documentation - Press the > next to Home button for instructions. Document max size is 500 kb and may take from 2 to 30 minutes depending on size to process do not press Save again wait for a message to appear at the top of the screen. Documents more than 10k characters will be divided into multiple Parse runs.

Selector

Action

Search to Delete

Apply Selection

Select

Press Select when done.

Date From

01/01/2026

Date To

12/01/2026

Any Text

a

Search

Reset

Actions	DocumentID	Date	Display Name	Description	Book Name
Delete Download	10		Justification for Customer ...	This file is a businessmemorandu...	Justification for Custon
Delete Download	9		Network Proposal	This file is a business letter for Pr...	Network Proposa

Figure: Search for Delete Download.

Home ?

Ask for Help...

Chat with Me

Screen Name

SN_IngestLetter

Description

SN_IngestLetter

Your upload was divided into 1 file for processing. No resume steps are expected. Estimated total processing time is about 0.42714 minutes.

File

Books Chapters

Screens Documents

Procedure Documents

Book Viewing

Word Control

Ingest Documents

Chat With Me

Other Functions

Utilities

Admin

Load Manuals Books Documents

Upload DOCX PDF RFT files to ingest Letters and Interoffice Memos into the AI knowledge system. It will Extract Chunks of Data and prepare them for AI Chat Agent Use the Search pane to locate existing records to Delete or Download. To Load new Letters or Interoffice Memos identify the types below.

NOTE: Applying the best description of the document will significantly improve the AI Chat Agent responses to the client if you receive a timeout message or a error of Limit Incomplete or Error refer the the documentation - Press the > next to Home button for instructions. Document max size is 500 kb and may take from 2 to 30 minutes depending on size to process do not press Save again wait for a message to appear at the top of the screen. Documents more than 10k characters will be divided into multiple Parse runs.

Selector

Action

Add New

Apply Selection

Select

Press Select when done.

Select File

Choose File

No file chosen

Upload

Allowed file types: PDF, DOCX, RTF

Uploaded File: TestMemo_20260404_192116.pdf

Save Clear

Letter and Memo Guidance

Document Format

PDF_DOCUMENT

Audience

Unassigned

Display Name

Document Date

Recipient

Sender

Subject

Business Domain

Unassigned

Or enter custom Business Domain

Select from the list or type a custom Business Domain.

Document Description

Be very descriptive. This guides the AI chat agent in understanding the content and improves retrieval quality.

SAMPLE DESCRIPTION: This file is a business letter or memorandum intended to communicate a specific message, instruction, request, decision, or update. It may include sender, recipient, subject, date, and supporting narrative content. It is designed to preserve correspondence context and improve later retrieval of communications, decisions, and business intent.

Figure: Upload File.

Corporate Intelligence System

Home ?

Ask for Help...

Q

Chat with Me

Screen Name

SN_IngestLetter

Description

SN_IngestLetter

Your upload was divided into 1 file for processing. No resume steps are expected. Estimated total processing time is about 0.42714 minutes.

File

Books
Chapters

Screens
Documents

Procedure
Documents

Book
Viewing

Word
Control

Ingest
Documents

Chat
With Me

Other
Functions

Utilities

Admin

Load Manuals Books Documents

Upload DOCX PDF RFT files to ingest Letters and Interoffice Memos into the AI knowledge system. It will Extract Chunks of Data and prepare them for AI Chat Agent Use the Search pane to locate existing records to Delete or Download. To Load new Letters or Interoffice Memos identify the types below.
NOTE: Applying the best description of the document will significantly improve the AI Chat Agent responses to the client if you receive a timeout message or a error of Limit Incomplete or Error refer the the documentation - Press the > next to Home button for instructions. Document max size is 500 kb and may take from 2 to 30 minutes depending on size to process do not press Save again wait for a message to appear at the top of the screen. Documents more than 10k characters will be divided into multiple Parse runs.

Selector

Action

Add New

Apply Selection

Select

Press Select when done.

Select File

Choose File

No file chosen

Allowed file types: PDF, DOCX, RTF

Uploaded File: TestMemo_20260404_192116.pdf

Upload

Save

Clear

Letter and Memo Guidance

Document Format

PDF_DOCUMENT

Audience

Both

Display Name

Justification for Customer Support WorkS

Document Date

04/04/2026

Recipient

Jake Billings,

Sender

Joseph Windgaurd

Subject

Justification for Customer Support WorkStations

Business Domain

Customer Service

Document Description

This document is a memorandum intended to communicate a Justification for Customer Support WorkStations. It is designed to preserve correspondence context and improve later retrieval of communications, decisions, and business intent.

Be very descriptive. This guides the AI chat agent in understanding the content and improves retrieval quality.
SAMPLE DESCRIPTION: This file is a business letter or memorandum intended to communicate a specific message, instruction, request, decision, or update. It may include sender, recipient, subject, date, and supporting narrative content. It is designed to preserve correspondence context and improve later retrieval of communications, decisions, and business intent.

Figure: Detail Screen.



Figure: Commit Parse to Database Chunks.

Corporate Intelligence System

Home ?

Ask for Help...

Screen Name
SN_IngestLetter

Description
SN_IngestLetter

Chat with Me

Chunk processing completed successfully. You may now build vectors.

File Books Screens Procedure Book Word Ingest Chat Other Utilities Admin
Chapters Documents Documents Viewing Control Documents Documents With Me Functions

Vector Preparation

The database has been prepared now we need to vector the data so that the ai chat agent can evaluate relevant data to a user request press below to start this process

Process for Vector

Load Manuals Books Documents

Upload DOCX PDF RFT files to ingest Letters and Interoffice Memos into the AI knowledge system. It will Extract Chunks of Data and prepare them for AI Chat Agent Use the Search pane to locate existing records to Delete or Download. To Load new Letters or Interoffice Memos identify the types below.

NOTE: Applying the best description of the document will significantly improve the AI Chat Agent responses to the client if you receive a timeout message or a error of Limit Incomplete or Error refer the the documentation - Press the > next to Home button for instructions. Document max size is 500 kb and may take from 2 to 30 minutes depending on size to process do not press Save again wait for a message to appear at the top of the screen. Documents more than 10k characters will be divided into multiple Parse runs.

Selector

Action

Add New

Apply Selection

Select

Press Select when done.

Select File

Choose File

No file chosen

Upload

Allowed file types: PDF, DOCX, RTF

Uploaded File: TestMemo_20260404_192116.pdf

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.

495.000 - Why Spreadsheets are different

Screen | 2026-07-19 00:00:00 SSDifference

495.000 Why Spreadsheets Are Different

Purpose

This section explains why spreadsheets require different processing methods than ordinary documents and describes the available methods for using spreadsheet data within the Corporate Intelligence System.

The appropriate ingestion method depends on the size of the spreadsheet, the type of questions users intend to ask, and whether the information will be used for occasional reference or for comprehensive analytical evaluation.

Two Spreadsheet Ingestion Methods

The Corporate Intelligence System supports two completely different spreadsheet ingestion methods. Although both begin with a spreadsheet, they are designed for different purposes and produce different capabilities.

Method 1 - Standard Spreadsheet Ingestion

The standard spreadsheet ingestion process is intended for small spreadsheets, generally less than one megabyte in size, and for users who simply want to ask occasional questions about the information contained within the spreadsheet.

During this process, the spreadsheet is converted into text and divided into a limited number of information chunks. To control AI processing costs, approximately twelve representative chunks are stored for transmission to the LLM rather than the complete spreadsheet. However, all spreadsheet chunks are stored in the database.

Because only a representative sample of the spreadsheet is transmitted, this method works well when the requested information is contained within those chunks. However, answers may be incomplete when the required data is scattered throughout the spreadsheet or located outside the sampled sections.

This ingestion method is intended primarily for one-time questions and general knowledge retrieval rather than detailed analysis.

Method 2 - Analytics Spreadsheet Ingestion

The Analytics Spreadsheet Ingestion process is designed for users who require complete analytical capabilities rather than simple question-and-answer retrieval.

Unlike the standard ingestion process, every row and every column of the spreadsheet is loaded into the

Analytics Database. No sampling is performed.

Since the complete spreadsheet is available, the Analytics Chat can perform calculations, filtering, grouping, trend analysis, comparisons, statistical evaluations, graph generation, and other advanced analytical operations using the entire dataset.

This method should always be used when spreadsheets will be analyzed repeatedly or when management reporting and dashboards are required.

Real-Time Operational Database Analytics

The Analytics Platform is not limited to spreadsheet data. Those spreadsheets are static and represent a snapshot in time.

It can also analyze live operational information directly from customer databases including accounting systems, payroll systems, inventory systems, manufacturing systems, CRM systems, and other business applications.

Instead of importing spreadsheets, secure database views are created within the customer's operational database. These views expose only the information required for analytics while protecting the remainder of the operational system.

A secure API is then developed to retrieve the information from these approved database views in real time.

Because the data is retrieved directly from the operational database, reports and analytics always reflect the most current information available without requiring spreadsheet exports.

Analytics Database Preparation

Before an operational database can be analyzed, a sample spreadsheet representing the data structure is normally provided.

This sample allows the Corporate Intelligence System to identify field names, field types, sample values, relationships, and other metadata required by the Analytics Chat to understand the available information and generate accurate SQL queries and visualizations.

The result is a true business intelligence environment capable of answering questions using current operational data while producing charts, graphs, summaries, comparisons, trends, and executive dashboards.

496.000 - General Spreadsheet Rules

Screen | 2026-07-19 00:00:00 SS Rules

496.000 General Spreadsheet Rules

Purpose

This section defines the standard spreadsheet rules required by the Corporate Intelligence System. Following these standards ensures that spreadsheets can be ingested correctly, analyzed accurately, and converted into Analytics Database tables without requiring manual corrections.

Although these rules may appear restrictive, they are designed to maximize data quality, simplify AI interpretation, and ensure consistent analytical results.

Why These Standards Are Important

Unlike a person, the Analytics Chat must determine the structure and meaning of a spreadsheet automatically. It relies on worksheet names, column names, data types, and sample values to understand the information being loaded.

When spreadsheets follow a consistent format, the ingestion process can correctly identify tables, fields, dates, numeric values, and relationships. Consistent standards also allow future spreadsheets to be processed with little or no manual intervention.

Following these standards significantly improves the accuracy of the Analytics Chat and reduces preparation time during implementation.

General Spreadsheet Requirements

Spreadsheets must be created using Microsoft Excel.

A spreadsheet may contain no more than five worksheets.

Worksheet names must not contain blank spaces.

Worksheet names must not exceed the maximum worksheet name length supported by Microsoft Excel, which is thirty-one characters.

Worksheet names should clearly identify the information contained within the worksheet.

Worksheet Structure

The first row of every worksheet must contain the column headings.

Each column heading should describe the information stored in that column using meaningful business names such as ProductNumber, ProductName, QuantityOnHand, InvoiceDate, or FiscalYear.

Every row after the heading row must contain data that corresponds to those column headings.

Blank rows are not permitted anywhere within the worksheet because they may cause the ingestion process to incorrectly determine where the data ends.

Completely blank columns should also be removed before the spreadsheet is ingested.

Column Naming Standards

All column names must use Camel Case formatting.

Examples include ProductNumber, ProductName, CustomerID, QuantityOnHand, InvoiceAmount, InvoiceDate, and FiscalYear.

Date fields should always include the word Date as part of the field name whenever practical. Examples include InvoiceDate, PaymentDate, TranDate, DueDate, and ShipDate.

Year fields should include the word Year within the field name. Examples include FiscalYear, CalendarYear, and TaxYear.

Month fields should include the word Month within the field name. Examples include FiscalMonth, CalendarMonth, and PostingMonth.

Following these naming standards helps the Analytics Chat automatically recognize dates, reporting periods, and other common business fields.

Blank Values

Blank cells are permitted when data is not available.

During ingestion blank values are automatically converted to NULL values within the Analytics Database.

For example, a blank InvoiceDate becomes NULL, a blank QuantityOnHand becomes NULL, and a blank ProductName becomes NULL.

Using NULL values allows the Analytics Chat to distinguish between missing information and actual data values.

API Database View Requirements

When data will be retrieved directly from an operational database through a secure API, additional standards apply.

The worksheet name must exactly match the database view name.

Because Microsoft Excel limits worksheet names to thirty-one characters, database view names must also comply with this limitation.

The worksheet structure must match the database view exactly so that every column corresponds to the appropriate field within the view.

Sample Spreadsheet Requirements For API Views

Every database view must have a corresponding sample spreadsheet workbook name with a limit of 5 workbooks per spreadsheet.

The sample spreadsheet should normally contain no more than twenty rows of representative production data.

The purpose of the sample spreadsheet is not to provide complete business data but rather to define the table structure, field names, field types, sample values, and overall layout for the Analytics Chat.

The Analytics Chat uses this information to understand the data model before it begins processing live information from the operational database.

Although database exports may not always conform to these standards, the sample spreadsheet should be modified as necessary before ingestion so that it follows all required spreadsheet rules.

Summary

These spreadsheet standards are intended to simplify implementation, improve ingestion accuracy, reduce configuration time, and provide the Analytics Chat with the information necessary to correctly understand both imported spreadsheets and real-time operational database data.

497.000 - Regular Spreadsheet or Analytics

Screen | 2026-07-19 00:00:00 SS_RegularAnalytic

497.000 Regular Spreadsheet Or Analytics Spreadsheet

Purpose

This section explains when a spreadsheet should be loaded into a regular Chat conversation and when it should be loaded into the Analytics Chat. Although both methods allow questions to be asked about spreadsheet data they are designed for different types of work.

Choosing The Correct Method

Before loading a spreadsheet the user should determine the primary objective. If the goal is to ask a few simple questions about the spreadsheet then a regular Chat conversation is usually the best choice. If the goal is to perform detailed analysis create graphs compare information identify trends or analyze large amounts of data then the Analytics Chat should be used.

Selecting the proper ingestion method improves both performance and the quality of the answers returned by the AI.

Regular Spreadsheet Chat

A regular spreadsheet chat is intended for general questions about relatively small spreadsheets.

During ingestion the spreadsheet is converted into text and divided into information chunks. To control AI processing costs only a representative number of those chunks are normally transmitted to the LLM when answering a question.

This method works well when the information needed to answer a question is located close together within the spreadsheet.

Typical examples include asking for the address of a customer identifying an invoice number finding the balance of an account or determining the value stored in a specific row.

Regular spreadsheet chats are intended primarily for question and answer conversations rather than detailed business analysis.

If the information needed to answer a question is scattered throughout a large spreadsheet the Analytics Chat will normally produce better results.

Analytics Spreadsheet Chat

The Analytics Chat is designed for management reporting executive analysis and business intelligence.

Unlike the regular spreadsheet chat every row and every column of the spreadsheet is loaded into the

Analytics Database. The complete dataset becomes available for analysis.

Because the entire spreadsheet is available the Analytics Chat can perform calculations filtering grouping sorting comparisons statistical analysis trend analysis and graph generation using all of the available information.

The Analytics Chat can answer questions that require examining thousands of records rather than only a representative sample.

Typical examples include identifying the highest selling products calculating gross profit margins comparing monthly sales analyzing customer purchasing trends evaluating inventory levels and generating executive dashboards.

The Analytics Chat can also automatically generate charts and graphs that visually present the analytical results making it particularly useful for supervisors managers directors and executives.

Static Data Analysis

Analytics spreadsheets are well suited for analyzing historical or static information that has been exported from another system.

Examples include monthly sales reports annual financial statements inventory snapshots payroll summaries manufacturing statistics customer activity reports and budgeting information.

Once loaded the Analytics Chat can evaluate the complete spreadsheet and answer complex analytical questions using all available data.

Real Time Operational Analytics

The Analytics Platform is not limited to spreadsheet analysis.

It can also analyze live operational information retrieved directly from customer databases through secured database views and APIs.

This allows managers and executives to ask questions using current operational data rather than waiting for someone to prepare and export spreadsheets.

Examples include identifying the highest selling products during the past week listing the five best selling products calculating the gross profit margin for each product identifying customers with overdue balances determining current inventory shortages evaluating payroll trends or reviewing manufacturing production statistics.

Because the information is retrieved directly from the operational database the answers reflect the most current business information available.

Management And Executive Decision Support

Although any user may use the Analytics Chat it is specifically designed to support the information needs of supervisors managers directors and executives.

The ability to analyze complete datasets generate graphs identify trends compare performance and retrieve current operational information makes the Analytics Chat a powerful business intelligence tool

for management decision making.

Summary

Use a regular spreadsheet chat when asking occasional questions about relatively small spreadsheets or when the required information is closely grouped together.

Use the Analytics Chat whenever complete spreadsheet analysis graphs statistical evaluations trend analysis management reporting or real time operational database analysis is required.

500.000 - Loading Spreadsheets for Chat Agent

Screen | 2026-05-21 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.

BEST Spreadsheets to Load to System

A spreadsheet may contain multiple worksheets or tabs inside a single workbook.

However, the spreadsheets that work best with the Chat Agent are spreadsheets that focus on a single business subject or reporting area.

The most effective spreadsheets normally use a structured row-and-column layout with the first row containing clear column headers followed by multiple data rows underneath.

Good spreadsheet structures help the AI understand what each column represents and improve how the Chat Agent searches, groups, summarizes, and answers questions from the worksheet data.

The best spreadsheet format is usually:

Row 1 = column headers.

Rows 2 and beyond = repeating business data records.

Examples of strong column headers include Category, Business Unit, Department, Year, Month, Revenue, Expense, Sales Amount, Inventory Count, Employee Name, Account Number, or Status.

Example worksheet structure:

Category | Business Unit | Year | Jan | Feb | Mar

Sales | Hardware | 2024 | 1000 | 2000 | 3000

Sales | Software | 2024 | 5000 | 4500 | 4700

Spreadsheets with consistent rows and clearly labeled columns usually produce better AI retrieval and more accurate Chat Agent answers.

Large mixed-purpose spreadsheets with many unrelated worksheet tabs, irregular layouts, merged cells, decorative formatting, scattered totals, or inconsistent row structures are more difficult for the AI pipeline to interpret correctly.

When possible, separate unrelated business subjects into different spreadsheet files before loading them into the system.

Well-structured spreadsheets improve chunk quality, vector quality, semantic search quality, and final Chat Agent response accuracy.

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.

Document Category provides a broad classification for the document and helps organize similar content together. Examples include Policy, Procedure, Manual, Standard, Training, Report, Contract, Reference,

and Compliance.

Document Subject identifies the primary topic of the document. Use a clear business description rather than a short code. Examples include Tenant Move In Procedures, Monthly Financial Reporting, Vendor Approval Process, Work Order Management, and Employee Onboarding.

Search Keyword 1, Search Keyword 2, and Search Keyword 3 provide additional search terms that users may enter when looking for the document. Think about the words someone would naturally type into a search box. Examples include Accounting, General Ledger, Month End, Payroll, Tenant, Lease, Inventory, Warehouse, Procurement, Vendor, Compliance, Safety, and Training.

Physical Location is optional and may be used when a paper copy, binder, file cabinet, records box, or other physical document storage location exists. Examples include Accounting Cabinet A Drawer 3, Records Room Box 14, Operations Binder 5, and Human Resources Shelf 2. Leave this field blank if no physical copy exists.

These fields are primarily used by the Document Search and Document Management functions. Completing them consistently makes documents easier to locate, organize, filter, review, and maintain as the document library grows.

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

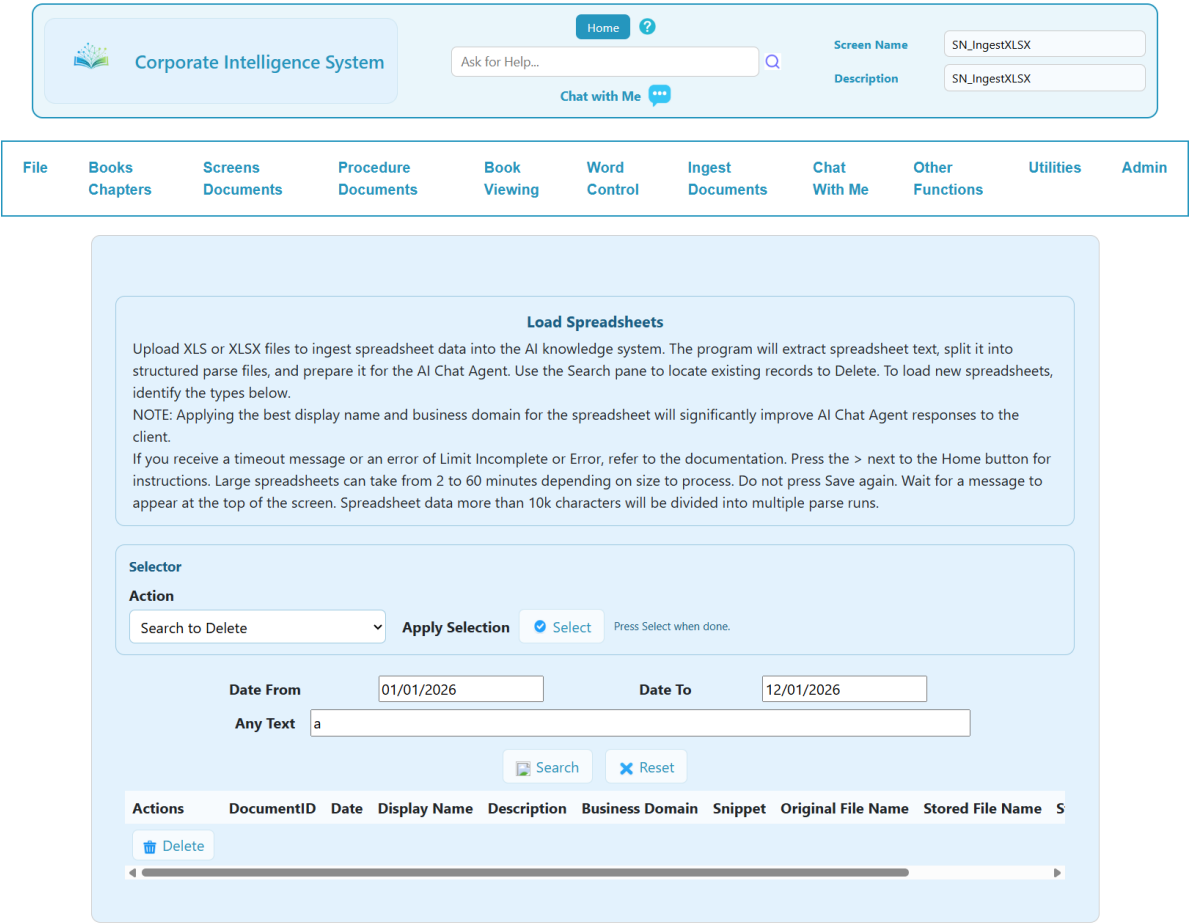


Figure: Search for Delete Download.

Home ?

Ask for Help...

Chat with Me

Screen Name

SN_IngestXLSX

Description

SN_IngestXLSX

Your upload was divided into 18 files for processing. You will likely need about 2 resume steps to finish processing this document. Estimated total processing time is about 14.76895 minutes.

File	Books Chapters	Screens Documents	Procedure Documents	Book Viewing	Word Control	Ingest Documents	Chat With Me	Other Functions	Utilities	Admin
------	----------------	-------------------	---------------------	--------------	--------------	------------------	--------------	-----------------	-----------	-------

Load Spreadsheets

Upload XLS or XLSX files to ingest spreadsheet data into the AI knowledge system. The program will extract spreadsheet text, split it into structured parse files, and prepare it for the AI Chat Agent. Use the Search pane to locate existing records to Delete. To load new spreadsheets, identify the types below.

NOTE: Applying the best display name and business domain for the spreadsheet will significantly improve AI Chat Agent responses to the client.

If you receive a timeout message or an error of Limit Incomplete or Error, refer to the documentation. Press the > next to the Home button for instructions. Large spreadsheets can take from 2 to 60 minutes depending on size to process. Do not press Save again. Wait for a message to appear at the top of the screen. Spreadsheet data more than 10k characters will be divided into multiple parse runs.

Selector

Action

Add New

Apply Selection

Select

Press Select when done.

Select File

Choose File

No file chosen

Allowed file types: PDF, DOCX, RTF

Uploaded File: MultiSheet_20260412_151547.xlsx

Upload

Save

Clear

Spreadsheet Guidance

Document Format

XLSX_DOCUMENT

Audience

Unassigned

Display Name

Business Domain

Unassigned

Or enter custom Business Domain

Select from the list or type a custom Business Domain.

Document Description

Describe what the spreadsheet contains, what business purpose it serves, and the kind of data or reporting it includes. This improves AI retrieval and interpretation.

SAMPLE DESCRIPTION: This spreadsheet contains structured business data organized by worksheet, row, and column. It may include listings, balances, transactions, schedules, inventory, budgets, financial summaries, operational tracking, or other tabular business records. It is intended to support search, analysis, reporting, and AI-assisted question answering.

Figure: Upload Spreadsheet.

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Corporate Intelligence System

Home ?

Ask for Help...

Chat with Me

Screen Name

SN_IngestXLSX

Description

SN_IngestXLSX

Batch limit reached. Additional files remain to be parsed.

File

Books Chapters

Screens Documents

Procedure Documents

Book Viewing

Word Control

Ingest Documents

Chat With Me

Other Functions

Utilities

Admin

Resume Document Parsing

We are processing multiple files created from your uploaded document. This parse batch stopped after 7 file(s) in the current request. Additional files remain. Click Resume to continue parsing the next group of files.

File Processing Status

7 of 18 files processed so far, 11 files remaining.

Estimated time remaining: about 9 minutes.

Estimated total parsing time: about 14 minutes.

Resume continues processing the next prepared file from your original upload.

Commit to Database saves everything parsed so far to the database and stops further file processing.

Abort stops processing and abandons the remaining files from this original upload.

Resume

Commit to Database

Abort

Load Spreadsheets

Upload XLS or XLSX files to ingest spreadsheet data into the AI knowledge system. The program will extract spreadsheet text, split it into structured parse files, and prepare it for the AI Chat Agent. Use the Search pane to locate existing records to Delete. To load new spreadsheets, identify the types below.

NOTE: Applying the best display name and business domain for the spreadsheet will significantly improve AI Chat Agent responses to the client.

If you receive a timeout message or an error of Limit Incomplete or Error, refer to the documentation. Press the > next to the Home button for instructions. Large spreadsheets can take from 2 to 60 minutes depending on size to process. Do not press Save again. Wait for a message to appear at the top of the screen. Spreadsheet data more than 10k characters will be divided into multiple parse runs.

Selector

Action

Add New

Apply Selection

Select

Press Select when done.

Select File

Choose File

No file chosen

Upload

Allowed file types: PDF, DOCX, RTF

Uploaded File: MultiSheet_20260412_151547.xlsx

Figure: Resume Parsing.

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Corporate Intelligence System

Home ?

Ask for Help...

Chat with Me

Screen Name

SN_IngestXLSX

Description

SN_IngestXLSX

All converted files were parsed successfully.

File

Books Chapters

Screens Documents

Procedure Documents

Book Viewing

Word Control

Ingest Documents

Chat With Me

Other Functions

Utilities

Admin

Chunk Database Preparation

We have completed the parsing of the document and we are ready to prepare this parsing and prepare the database so the ai chat agent can use this data press below to start this process

Process for DB

Load Spreadsheets

Upload XLS or XLSX files to ingest spreadsheet data into the AI knowledge system. The program will extract spreadsheet text, split it into structured parse files, and prepare it for the AI Chat Agent. Use the Search pane to locate existing records to Delete. To load new spreadsheets, identify the types below.

NOTE: Applying the best display name and business domain for the spreadsheet will significantly improve AI Chat Agent responses to the client.

If you receive a timeout message or an error of Limit Incomplete or Error, refer to the documentation. Press the > next to the Home button for instructions. Large spreadsheets can take from 2 to 60 minutes depending on size to process. Do not press Save again. Wait for a message to appear at the top of the screen. Spreadsheet data more than 10k characters will be divided into multiple parse runs.

Selector

Action

Add New

Apply Selection

Select

Press Select when done.

Select File

Choose File

No file chosen

Allowed file types: PDF, DOCX, RTF

Uploaded File: MultiSheet_20260412_151547.xlsx

Upload

Figure: Commit Parse to Database Chunks.

Corporate Intelligence System

Home ?

Ask for Help...

Screen Name
SN_IngestXLSX

Description
SN_IngestXLSX

Chat with Me

Chunk processing completed successfully. You may now build vectors.

File
Books
Chapters
Screens
Documents
Procedure
Documents
Book
Viewing
Word
Control
Ingest
Documents
Chat
With Me
Other
Functions
Utilities
Admin

Vector Preparation

The database has been prepared now we need to vector the data so that the ai chat agent can evaluate relevant data to a user request press below to start this process

Process for Vector

Load Spreadsheets

Upload XLS or XLSX files to ingest spreadsheet data into the AI knowledge system. The program will extract spreadsheet text, split it into structured parse files, and prepare it for the AI Chat Agent. Use the Search pane to locate existing records to Delete. To load new spreadsheets, identify the types below.

NOTE: Applying the best display name and business domain for the spreadsheet will significantly improve AI Chat Agent responses to the client.

If you receive a timeout message or an error of Limit Incomplete or Error, refer to the documentation. Press the > next to the Home button for instructions. Large spreadsheets can take from 2 to 60 minutes depending on size to process. Do not press Save again. Wait for a message to appear at the top of the screen. Spreadsheet data more than 10k characters will be divided into multiple parse runs.

Selector

Action

Add New
Apply Selection
Select
Press Select when done.

Select File

Choose File
No file chosen

Allowed file types: PDF, DOCX, RTF

Uploaded File: MultiSheet_20260412_151547.xlsx

Upload

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.

550.000 - Loading Analytics Spreadsheets for Chat Agent

Screen | 2026-07-19 00:00:00 SN_IngestAnalytics

550.000 Loading Analytics Spreadsheets and External API Views

Purpose

Use this screen to load XLS or XLSX spreadsheets for the Chat Analytics Agent.

This screen supports two analytics data methods.

The first method loads spreadsheet worksheet data into internal SQL analytics tables.

The second method defines external customer data that remains in customer systems and is retrieved in real time through secured API views.

External API data may include accounting, payroll, inventory, sales, financial, operational, customer, supplier, scheduling, or other structured business data.

An accompanying spreadsheet is still required when external API views are used.

The spreadsheet provides the worksheet names, column names, field definitions, detected data types, worksheet statistics, and sample rows needed by the Chat Analytics Agent.

The spreadsheet used for an external API view does not have to contain the complete customer production data.

It should contain representative sample data that accurately describes the structure and expected values of each external API view.

Analytics spreadsheets are not loaded for the standard AI Chat Agent.

The standard AI Chat Agent searches document text, chunks, and retrieved business knowledge.

The Chat Analytics Agent works differently.

It uses structured rows, columns, measures, categories, dates, flags, field definitions, sample data, internal SQL tables, and approved external API views to perform calculations and analysis.

The Chat Analytics Agent can produce totals, comparisons, rankings, findings, recommendations,

predictions, and graphs from structured business data.

Use this screen when the source contains structured business data that should be analyzed as rows and columns instead of searched as ordinary document text.

Good examples include sales records, inventory records, payroll summaries, expense reports, budgets, financial statements, operational reports, customer lists, supplier records, schedules, risk lists, and other structured business data.

Choosing The Analytics Data Method

Use the standard spreadsheet method when the worksheet rows should be imported and stored inside the Corporate Intelligence System.

Under the standard spreadsheet method, each qualified worksheet becomes an internal physical SQL analytics table.

Use the external API method when the customer data must remain in the customer system and be retrieved through an approved secured API.

The external API method is appropriate for current accounting, payroll, inventory, sales, manufacturing, financial, or operational data that changes frequently and should be analyzed in real time.

When the external API method is selected, the uploaded spreadsheet is used as a definition and sample workbook.

The spreadsheet allows the system to create the analytics document records, table definitions, field definitions, field data types, sample data, and analytics planning information required by the Chat Analytics Agent.

The sample workbook must accurately match the columns and data structure returned by the external API view.

The sample workbook must contain one worksheet for each external API view that will be available to Chat Analytics.

Rules Before Loading

Only XLS and XLSX files are allowed.

The maximum upload size is 25 MB.

One uploaded workbook may contain one or more worksheets.

Each worksheet must use row 1 as the column header row.

Rows 2 and below must contain worksheet data.

The header row must contain mostly text headings.

At least 70 percent of the non blank header cells must be non numeric.

Column headers should describe the data clearly.

Good examples include ProductID, ProductName, Category, SupplierName, UnitCost, RetailPrice, UnitsSoldJan, ClosingStock, StockStatus, GrossMarginPercent, SaleCandidateSw, and AnalyticsNote.

Worksheet names and column headers should use letters, numbers, and underscores when possible.

Worksheet names and column headers should not contain spaces, duplicate names, punctuation, slashes, symbols, or special characters.

Do not use non ASCII characters in worksheet names or column headers.

Do not use merged header cells, blank header cells, decorative title rows, subtotal rows above the header, or report layouts where data is scattered across the worksheet.

Each column should contain one consistent type of data.

A number column should contain numbers only.

A money column should contain money values only.

Dollar signs and commas are allowed and are normalized during loading.

A percent column should contain percent values only.

Values such as 20 percent or 20% are normalized to numeric decimal values for analytics.

A boolean column should contain one boolean pattern only.

Accepted boolean patterns include Y and N, Yes and No, True and False, T and F, or 1 and 0.

Boolean values are normalized to 1 for true and 0 for false.

A date column should contain valid dates only.

Use consistent date formats within the same column.

Blank cells are allowed.

Blank cells are stored as NULL.

If a value does not match the detected column type, the system stores NULL for that value and counts it as a data mismatch.

Do not mix dates, money, text, booleans, numbers, and percentages inside the same column.

For best results, clean the spreadsheet before loading.

Make sure the header row is clear, the data starts on row 2, every column has one meaning, and every column uses one consistent data type.

External API Sample Workbook Rules

The sample workbook must contain one representative worksheet for every external API view that will be available to Chat Analytics.

Each sample worksheet must use the same columns returned by its related external API view.

The sample worksheet column order should match the external API view column order whenever practical.

The sample worksheet data types should accurately represent the values returned by the external API view.

The sample rows should contain realistic representative values without exposing unnecessary confidential production data.

The sample workbook is used to create field definitions, sample data, data profiles, and analytics planning information.

The sample workbook is not used as the live data source after the external API configuration is activated.

The live data is retrieved from the customer system through the configured secured API.

Do not select Use External API Table unless the customer API, secured views, credentials, and view names have been prepared and approved.

Repair And Reject Rules

The system checks the workbook before it creates analytics records or tables.

The system checks for duplicate spreadsheet loads, invalid worksheet names, invalid column headers, missing headers, duplicate headers, worksheet structure problems, and data structure problems.

If a worksheet name or column header can be repaired safely, the system may repair it and show the change in the Spreadsheet Format Review report.

For example, a column header such as Formula / Rule may be repaired to Formula_Rule.

If a worksheet has missing headers, invalid header structure, duplicate final column names, or no valid data structure, the worksheet may be rejected.

If the workbook has a hard error, the spreadsheet cannot be loaded.

If some worksheets are valid and some worksheets are rejected, the screen may allow you to continue with only the valid worksheets.

Although partial loading is allowed when valid worksheets exist, the recommended practice is to abort, correct the workbook, and reload a clean spreadsheet whenever practical.

Processing

This screen has two main action paths.

Add New is used to upload and load a new analytics spreadsheet or an external API sample workbook.

Search to Delete is used to find analytics spreadsheets or external API analytics definitions that were previously loaded and delete them before reloading a corrected version.

In Add New mode, choose the source XLS or XLSX file and press Upload.

After Upload, the system immediately checks the spreadsheet format before asking for business detail information.

If the spreadsheet has a hard error, the system displays a report and the spreadsheet cannot continue.

If the spreadsheet passes or contains repairable issues, the system displays the Spreadsheet Format Review report.

The Spreadsheet Format Review report shows workbook status, worksheet counts, qualified worksheets, rejected worksheets, worksheet repairs, header repairs, missing headers, and column level results.

Green values show items that passed.

Red values show items that require attention.

If the report shows that all worksheets qualify and only repairs are needed, review the repaired names carefully.

Press Continue if the repairs are acceptable.

If the report shows rejected worksheets, review the rejection reason before deciding whether to continue with valid worksheets only or abort and fix the spreadsheet.

After Continue, the detail pane opens.

The detail pane records the business identity, classification, description, and data source method for the analytics workbook.

Complete Display Name, Business Domain, Document Category, Document Subject, Search ID fields, Audience, Physical Location when applicable, and Document Description carefully.

These fields help users find the analytics source later and help the Chat Analytics Agent understand the business context of the data.

Leave Use External API Table unselected when the worksheet data should be imported into internal SQL analytics tables.

Select Use External API Table when the workbook contains schema and sample data for customer information that will be retrieved through external API views.

When Use External API Table is selected, the External API Configuration section and the External Workbook and Real View Names section are used.

External API Configuration

External API URL identifies the approved customer API endpoint used to retrieve external analytics data.

Enter the complete API URL supplied by the customer technical team.

Protocol Version identifies the version of the customer API protocol expected by the Corporate Intelligence System.

API Key / Token contains the approved API key, bearer token, access token, or other customer authentication value.

API Password / Secret contains the related password, secret, or secured authentication value when required.

Timeout Seconds controls how long the system waits for the external API to return a response before the request is treated as failed.

API Active determines whether the external API configuration may be used for analytics requests.

Set API Active to Yes only after the API information, credentials, secured views, and real view mappings have been verified.

The external API configuration applies to all qualifying worksheets in the uploaded sample workbook.

API credentials and secrets should be entered only by authorized technical personnel.

External Workbook And Real View Names

The system displays every qualified workbook worksheet name in the External Workbook and Real View Names section.

For each displayed Workbook Name, enter the exact customer external view name in the related Real View Name field.

Excel worksheet names have length and character limitations.

The worksheet name may therefore be shorter or different from the complete customer database or API view name.

The Real View Name must match the approved customer view exactly.

Verify spelling, capitalization, underscores, schema names, periods, prefixes, suffixes, and every other character.

An incorrect Real View Name will cause the external API request to fail.

Do not enter a physical customer table name unless that exact object is the approved secured API view.

The customer technical team should provide the approved real view names.

The external API should expose only approved secured views and should not provide unrestricted access to customer databases.

After all required detail and API information is complete, press Save.

For a standard spreadsheet load, Save creates one analytics document record, one physical SQL analytics table, and one table definition record for each qualified worksheet.

For an external API workbook, Save creates the analytics document records, external table definitions, field definitions, sample data, worksheet profiles, API configuration, and real view mappings needed by Chat Analytics.

The external API sample workbook does not become the permanent live data source.

The approved customer API views remain the live data source.

The final report confirms whether the analytics definitions and related records were created successfully.

Reading The Spreadsheet Format Review

The Spreadsheet Format Review report appears after the workbook is uploaded and checked.

The report shows the original file name, stored file name, file type, file size, total worksheets, qualified worksheets, rejected worksheets, and overall status.

The worksheet sections show the original worksheet name, final worksheet name, row count, column count, worksheet repairs, header repairs, duplicate names, missing headers, and individual column results.

Review every repaired worksheet name and repaired column header carefully.

For external API sample workbooks, repaired names affect the internal analytics identity but do not replace the required Real View Name.

Press Continue only when the qualified worksheet structure accurately represents the intended analytics source.

Press Abort when the workbook should be corrected before continuing.

Reading The Final Report

The final analytics load report shows the load summary, created analytics document IDs, created analytics table or definition names, worksheet load details, messages, warnings, and errors.

Status OK means the analytics load or external analytics definition process completed.

Analytics Documents shows how many worksheet analytics document records were created.

Physical Tables shows how many internal SQL analytics tables were created for a standard spreadsheet load.

For an external API workbook, the physical table count may represent external analytics definitions rather than imported production data.

Table Definitions shows how many reusable schema definition records were created.

Rows Inserted shows how many worksheet data rows were loaded into internal SQL analytics tables during a standard spreadsheet load.

For an external API workbook, sample rows may be stored as definition data while live production rows

remain in the customer system.

Data Mismatches shows how many sample or imported values did not match the detected column type and were stored as NULL.

The worksheet detail area shows rows, columns, numeric fields, text fields, date fields, blank cells, blank rows, duplicate rows, and mismatches.

If warnings appear, review them before using the source for analytics.

If errors appear, treat the load or external API configuration as incomplete until the issue is corrected.

WhereToFind

Main Menu to Ingest Documents to Load Analytics Spreadsheets.

Images

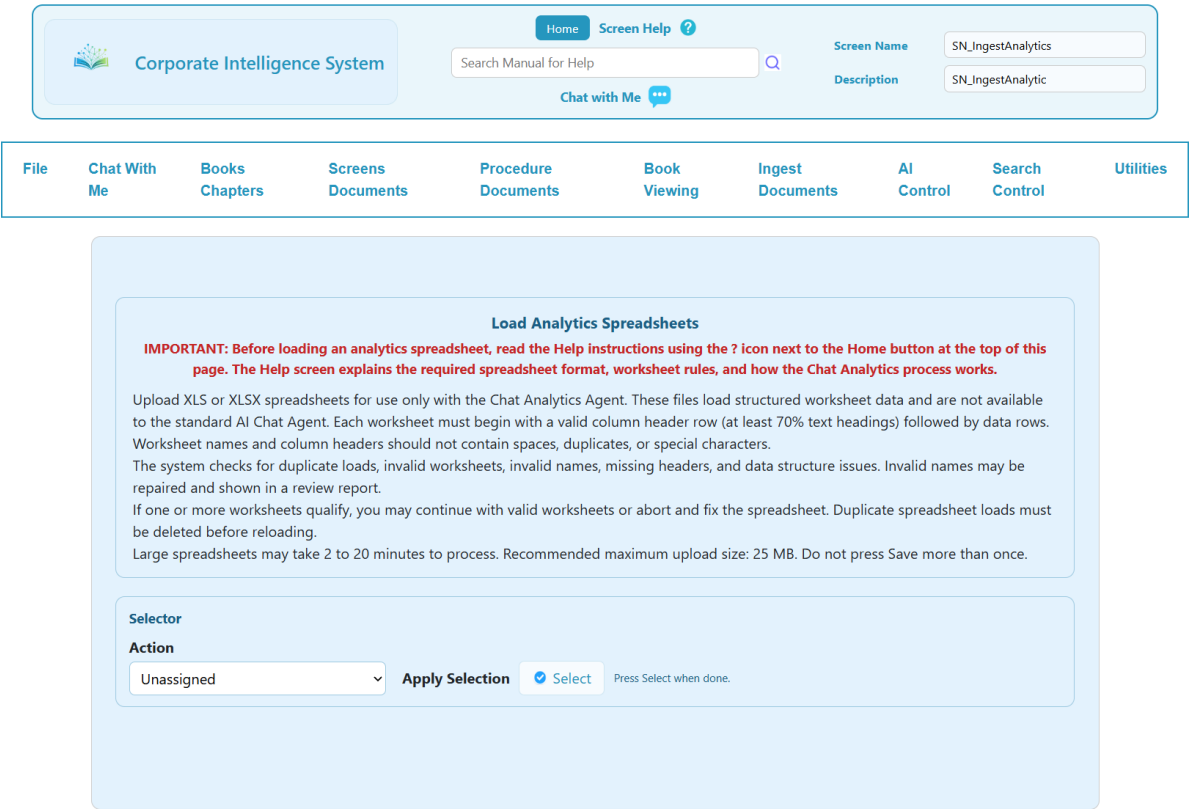


Figure: Main Load Analytics Spreadsheets screen and action selector.

Home

Screen Help ?

Search Manual for Help

Q

Screen Name

SN_IngestAnalytics

Description

SN_IngestAnalytic

Chat with Me

File

Chat With Me

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Load Analytics Spreadsheets

IMPORTANT: Before loading an analytics spreadsheet, read the Help instructions using the ? icon next to the Home button at the top of this page. The Help screen explains the required spreadsheet format, worksheet rules, and how the Chat Analytics process works.

Upload XLS or XLSX spreadsheets for use only with the Chat Analytics Agent. These files load structured worksheet data and are not available to the standard AI Chat Agent. Each worksheet must begin with a valid column header row (at least 70% text headings) followed by data rows. Worksheet names and column headers should not contain spaces, duplicates, or special characters. The system checks for duplicate loads, invalid worksheets, invalid names, missing headers, and data structure issues. Invalid names may be repaired and shown in a review report.

If one or more worksheets qualify, you may continue with valid worksheets or abort and fix the spreadsheet. Duplicate spreadsheet loads must be deleted before reloading.

Large spreadsheets may take 2 to 20 minutes to process. Recommended maximum upload size: 25 MB. Do not press Save more than once.

Selector

Action

Add New

▼

Apply Selection

Select

Press Select when done.

Select Analytics Spreadsheet

Choose File

Sample_Operations_Re...Inventory_Analytics.xlsx

Allowed file types: XLS, XLSX. Maximum upload size: 25 MB.

Upload

Figure: Select and upload an XLS or XLSX analytics spreadsheet.

Corporate Intelligence System

Home Screen Help ?

Search Manual for Help

Screen Name SN_IngestAnalytics

Description SN_IngestAnalytic

Chat with Me

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Load Analytics Spreadsheets

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Selector

Action

Add New ▼ **Apply Selection** ✔ Select Press Select when done.

Spreadsheet Format Review

All worksheets passed the format check and are ready for Chat Analytics. Review the results below, then click Continue to enter the document details.

All worksheets qualify, but repairs require user review.

Continue Abort

Workbook Summary					
Item	Value	Item	Value	Item	Value
Original File	Sample_Operations_Retail_Inventory_Analytics.xlsx	Stored File	Sample_Operations_Retail_Inventory_Analytics.xlsx	Temp Path	/tempupload
Status	REVIEW	Total Worksheets	2	File Type	xlsx
Qualified Worksheets	2	Rejected Worksheets	0	File Size	325201
Analytics Candidate	Y	All Worksheets Qualify	Y	Fatal Error	N
Worksheet Repair Found	N	Header Repair Found	Y	Header Missing Found	N

Worksheet: Retail_Inventory_Analytics					
Item	Value	Item	Value	Item	Value
Status	Qualified	Original Name	Retail_Inventory_Analytics	Final Name	Retail_Inventory_Ar
Rows	1001	Highest Column	A1	Column Count	35
Header Non Empty	35	Header Numeric	0	Header Non Numeric %	100.00
Worksheet Name OK	Y	Worksheet Name Repaired	N	Worksheet Name Rejected	N
Duplicate Original Name	N	Duplicate Final Name	N	Duplicate Headers	0
Column	Original Header	Final Header	OK	Repaired	Rejected / Missi
A	ProductID	ProductID	Y	N	Missing: N / Reje
B	ProductName	ProductName	Y	N	Missing: N / Reje
C	Category	Category	Y	N	Missing: N / Reje

Continue Abort

Figure: Spreadsheet Format Review showing qualified worksheets, repairs, and column results.

Corporate Intelligence System

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Screen Name

SN_IngestAnalytics

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SN_IngestAnalytic

Chat with Me

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The system checks for duplicate loads, invalid worksheets, invalid names, missing headers, and data structure issues. Invalid names may be repaired and shown in a review report.

If one or more worksheets qualify, you may continue with valid worksheets or abort and fix the spreadsheet. Duplicate spreadsheet loads must be deleted before reloading.

Large spreadsheets may take 2 to 20 minutes to process. Recommended maximum upload size: 25 MB. Do not press Save more than once.

Selector

Action

Add New

Apply Selection

Select

Press Select when done.

Save

Clear

Abort

Chat Analytics Spreadsheet Details

When **Use External API Table** is selected, the uploaded spreadsheet is used only as a sample to identify the workbook names, field definitions, and sample data. No worksheet data from this spreadsheet will be imported into the Analytics database. For each workbook listed below, enter the **exact External API View Name** that exists in the customer's database. This name will become the Analytics Table Name and will be used for all future API requests. The External API View Name must exactly match the customer's database view name. Any difference in spelling, capitalization, spaces, underscores, or other characters may cause future API requests to fail.

☒ **Use External API Table**

Select this option when the uploaded spreadsheet contains sample workbook data for external API views.

External API Configuration

Enter the external API connection information that applies to all qualified workbooks in this uploaded spreadsheet.

External API URL

https://customer.example.com/api/analyti

Protocol Version

1.0

API Key / Token

API Password / Secret

Timeout Seconds

60

API Active

Yes

External Workbook and Real View Names

Important: You must be extremely careful and enter the exact real external view name for every workbook shown below. Verify the spelling, capitalization, underscores, schema name, periods, and every other character. An incorrect real view name will cause the external API call to fail.

Workbook Name

AI_Manufacturing_Customer_Summa

Real View Name

Enter the exact real view name

Workbook Name

AI_Manufacturing_Inventory_Stat

Real View Name

Enter the exact real view name

Workbook Name

AI_Manufacturing_Production_Eff

Real View Name

Enter the exact real view name

Workbook Name

AI_Manufacturing_Product_Perfor

Real View Name

Enter the exact real view name

Workbook Name

AI_Manufacturing_Sales_Summary

Real View Name

Enter the exact real view name

Document Type

ANALYTIC

Audience

Unassigned

Display Name

Business Domain

Unassigned

Or enter custom Business Domain

Select from the list or type a custom Business Domain.

Document Category

Unassigned

Document Subject

Search ID 1

Search ID 2

Search ID 3

Physical Location

Optional paper file location, box, cabinet, room, or binder

Document Description

Describe what the spreadsheet contains, what business purpose it serves, and what questions users may ask with Chat Analytics.

SAMPLE DESCRIPTION: This analytics spreadsheet contains structured business data organized by worksheet, row, and column. It may include transactions, balances, inventory, schedules, budgets, summaries, or other tabular records. It is intended to support SQL-based analysis, reporting, and AI-assisted business questions.

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Figure: Analytics detail pane with Use External API Table, API configuration, workbook names, and real view name mapping.

Corporate Intelligence System

Home Screen Help ?

Search Manual for Help

Screen Name SN_IngestAnalytics

Description SN_IngestAnalytic

Chat with Me

OK: 2 analytics documents and 2 analytics tables created. 1024 rows loaded.

File Chat With Me Books Chapters Screens Documents Procedure Documents Book Viewing Ingest Documents AI Control Search Control Utilities

Load Analytics Spreadsheets

IMPORTANT: Before loading an analytics spreadsheet, read the Help instructions using the ? icon next to the Home button at the top of this page. The Help screen explains the required spreadsheet format, worksheet rules, and how the Chat Analytics process works.

Upload XLS or XLSX spreadsheets for use only with the Chat Analytics Agent. These files load structured worksheet data and are not available to the standard AI Chat Agent. Each worksheet must begin with a valid column header row (at least 70% text headings) followed by data rows. Worksheet names and column headers should not contain spaces, duplicates, or special characters. The system checks for duplicate loads, invalid worksheets, invalid names, missing headers, and data structure issues. Invalid names may be repaired and shown in a review report. If one or more worksheets qualify, you may continue with valid worksheets or abort and fix the spreadsheet. Duplicate spreadsheet loads must be deleted before reloading. Large spreadsheets may take 2 to 20 minutes to process. Recommended maximum upload size: 25 MB. Do not press Save more than once.

Selector

Action

Add New

Apply Selection

Select

Press Select when done.

Analytics Load Completed

End

OK: 2 analytics documents and 2 analytics tables created. 1024 rows loaded.

Review the final analytics load results below. Green items loaded successfully. Red items require attention.

Load Summary					
Item	Value	Item	Value	Item	Value
Status	OK	Qualified Worksheets	2	Rejected Worksheets	0
Analytics Documents	2	Physical Tables	2	Table Definitions	2
Rows Inserted	1024	Data Mismatches	0	Language	EN

Created Analytics Document IDs

1

2

Created Physical Analytics Tables

C000001_Sample_Operations_Retail_Inventory_Analytics_Retail_Inve

C000002_Sample_Operations_Retail_Inventory_Analytics_Formula_Gui

Worksheet Load Detail

Worksheet	Analytics ID	Table Name	Rows	Columns	Quality Stats
Retail_Inventory_Analytics	1	C000001_Sample_Operations_Retail_Inventory_Analytics_Retail_Inve	1000	35	Numeric: 28 Text: 6 Date: 0 Blank Cells: 0 Blank Rows: 0 Duplicate Rows: 0 Mismatches: 0
Formula_Guide	2	C000002_Sample_Operations_Retail_Inventory_Analytics_Formula_Gui	24	3	Numeric: 0 Text: 3 Date: 0 Blank Cells: 0 Blank Rows: 0 Duplicate Rows: 0 Mismatches: 0

Messages

Session metadata restored.

Worksheet qualification array restored.

Source file resolved.

Workbook opened.

Worksheet loaded: Retail_Inventory_Analytics -> C000001_Sample_Operations_Retail_Inventory_Analytics_Retail_Inve

End

Figure: Final report showing created analytics records, tables, worksheet details, and processing messages.

Corporate Intelligence System

Home Screen Help ?

Search Manual for Help

Screen Name SN_IngestAnalytics

Description SN_IngestAnalytic

Chat with Me

File Chat With Me Books Chapters Screens Documents Procedure Documents Book Viewing Ingest Documents AI Control Search Control Utilities

Load Analytics Spreadsheets

IMPORTANT: Before loading an analytics spreadsheet, read the Help instructions using the ? icon next to the Home button at the top of this page. The Help screen explains the required spreadsheet format, worksheet rules, and how the Chat Analytics process works.

Upload XLS or XLSX spreadsheets for use only with the Chat Analytics Agent. These files load structured worksheet data and are not available to the standard AI Chat Agent. Each worksheet must begin with a valid column header row (at least 70% text headings) followed by data rows. Worksheet names and column headers should not contain spaces, duplicates, or special characters. The system checks for duplicate loads, invalid worksheets, invalid names, missing headers, and data structure issues. Invalid names may be repaired and shown in a review report. If one or more worksheets qualify, you may continue with valid worksheets or abort and fix the spreadsheet. Duplicate spreadsheet loads must be deleted before reloading. Large spreadsheets may take 2 to 20 minutes to process. Recommended maximum upload size: 25 MB. Do not press Save more than once.

Selector

Action

Search to Delete

Apply Selection

Select

Press Select when done.

Doc Type ANALYTIC

Any Text

Cancel

From Date

To Date

Search

Business Domain SALES

Document Category All Categories

Document Subject All Subjects

Search Keyword 1 All Keyword 1

Search Keyword 2 All Keyword 2

Search Keyword 3 All Keyword 3

Go to Page [1] of 1

Records: 2

Action	Analytics ID	Source Doc	Status	Ready	Language	Business Domain	Category	Subject	Display Name	Descri
Delete	2	0	FINAL	Y	EN	SALES	FINANCIAL_STATEMENT	Inventory and sales	Inventory Sales Status	Inventc
Delete	1	0	FINAL	Y	EN	SALES	FINANCIAL_STATEMENT	Inventory and sales	Inventory Sales Status	Inventc

Figure: Search previously loaded analytics records for deletion before reloading.

ButtonsAndActions

Select chooses the workflow path based on the selected Action.

Add New opens the upload path for a new analytics spreadsheet or external API sample workbook.

Search to Delete opens the search path for previously loaded analytics records.

Upload sends the selected XLS or XLSX file to the temporary upload area and starts the spreadsheet format check.

Continue accepts the qualified worksheets and opens the detail pane.

Abort stops the current upload workflow and allows the workbook to be corrected and uploaded again.

Save validates the detail pane and completes the selected analytics data method.

For a standard spreadsheet, Save creates analytics records, physical analytics tables, worksheet rows,

field definitions, and table definition records.

For an external API workbook, Save creates analytics records, external table definitions, sample data, API configuration, and real view mappings.

Clear clears the detail pane fields.

End closes the final report workflow and clears the current load state.

Search runs the search criteria and displays matching analytics records.

Cancel closes the search pane or stops the current search action.

Delete removes the selected analytics load and its related analytics records, definitions, mappings, and internal physical analytics tables when applicable.

FieldsOrSettings

Document Type is fixed as ANALYTIC for this screen.

Audience identifies who should be able to use the analytics source.

Display Name is the friendly name shown to users.

Business Domain classifies the business area such as Sales, Finance, Inventory, Payroll, Operations, Compliance, Manufacturing, or IT.

Document Category classifies the type of business data.

Document Subject describes the primary analytical topic of the source.

Search ID 1, Search ID 2, and Search ID 3 provide searchable identifiers that help locate the analytics source later.

Physical Location is optional and may describe where a paper, archived, customer, or external copy exists.

Document Description should explain what the analytics source contains, what business purpose it supports, and what questions users may ask with Chat Analytics.

A good description improves search, source selection, SQL planning, and analytical context.

Use External API Table identifies whether the workbook data will be imported internally or used as sample and definition data for external API views.

External API URL identifies the customer API endpoint.

Protocol Version identifies the expected API protocol version.

API Key / Token stores the approved API authentication key or token.

API Password / Secret stores the related secured secret when required.

Timeout Seconds controls the maximum API response waiting period.

API Active controls whether the external API configuration is available for use.

Workbook Name displays each qualified worksheet name from the uploaded workbook.

Real View Name stores the exact approved customer API view name related to the displayed workbook worksheet.

KeysAndScope

This screen creates structured analytics data and definitions, not standard document text chunks.

Each qualified worksheet becomes one analytics document record.

Under the standard spreadsheet method, each qualified worksheet becomes one internal physical SQL analytics table.

Under the external API method, each qualified worksheet becomes one external analytics table definition connected to an approved customer API view.

Each internal or external analytics table identity receives one table definition record.

The analytics document record stores business metadata, worksheet identity, profile JSON, sample rows JSON, and field description JSON.

The table definition record stores the reusable fieldDefinitions JSON required for SQL and analytics planning.

The internal physical analytics table stores imported worksheet row data when the standard spreadsheet method is used.

The external API configuration stores the information required to request current data from the approved customer API.

The Real View Name mapping connects each internal workbook identity to the exact approved customer API view.

The Chat Analytics Agent uses these records to plan SQL, request internal or external data, interpret result rows, and return business answers.

RulesAndValidations

A file must be selected before Upload is pressed.

The file must be XLS or XLSX.

The file must not exceed 25 MB.

The spreadsheet must not already exist as a prior analytics load unless the prior load is deleted first.

At least one worksheet must qualify before the user can continue.

The header row must be row 1.

Data rows must start on row 2.

At least 70 percent of non blank header cells must be text headings.

Worksheet names must be valid or repairable.

Column headers must be valid or repairable.

Column headers must not be blank.

Final repaired column headers must not duplicate another final column header in the same worksheet.

Each column should contain one consistent data type.

Blank cells are stored as NULL.

Invalid typed values are stored as NULL and counted as data mismatches.

When Use External API Table is selected, the External API URL must contain the approved customer API endpoint.

Required API authentication information must be entered.

Timeout Seconds must contain a valid positive number.

Every qualified workbook worksheet must have a related Real View Name.

Every Real View Name must exactly match the approved external API view name.

The external API view must return columns that match the uploaded sample worksheet definition.

API Active should not be set to Yes until the configuration has been verified.

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

Correct the source workbook or API configuration and restart the process from the beginning.

DownstreamEffects

A successful standard spreadsheet load makes the imported worksheet data available to the Chat Analytics Agent.

A successful external API definition makes the approved customer API views available to the Chat Analytics Agent.

The analytics source can be selected for questions that require structured calculations and SQL based answers.

The Chat Analytics Agent uses the table schema, sample rows, row counts, field types, profile information, and business descriptions to plan analytics requests.

For internal analytics tables, the internal SQL executor runs calculations directly against the imported

physical tables.

For external API analytics, the system requests current data from the approved customer API view and processes the returned structured rows.

The system can perform totals, counts, averages, rankings, comparisons, filters, grouping, trends, exceptions, and other analytical operations.

The final answer process can use result rows to create business answers, findings, limitations, confidence statements, recommendations, and graph data when graph requests are supported.

External API access allows current customer information to be analyzed without copying the complete production database into the Corporate Intelligence System.

Examples

Example 1: Load an inventory spreadsheet into an internal analytics table so users can ask which products are sale candidates, which items have high inventory risk, and which categories have the highest inventory value.

Example 2: Load a sales spreadsheet so users can ask for sales totals by customer, region, month, product, or salesperson.

Example 3: Load a finance spreadsheet so users can ask for expense rankings, margin analysis, budget variance, department comparisons, and trend graphs.

Example 4: Load a payroll spreadsheet so users can ask for labor cost summaries, department totals, overtime comparisons, and exception lists.

Example 5: Upload a sample payroll workbook, select Use External API Table, and map each worksheet to a secured payroll API view so authorized users can analyze current payroll information.

Example 6: Upload sample accounting worksheets and map them to approved general ledger, accounts payable, accounts receivable, and financial summary API views.

Example 7: Upload sample inventory worksheets and map them to approved inventory balance, purchasing, receiving, production, and sales API views.

Example 8: Use shortened Excel worksheet names in the sample workbook and enter the complete customer view names in the Real View Name fields.

Troubleshooting

If no action is selected, choose Add New or Search to Delete and press Select.

If Upload fails because no file was selected, choose an XLS or XLSX file and press Upload again.

If Upload fails because the file type is invalid, convert the source file to XLS or XLSX and try again.

If the file is too large, reduce the workbook size or split it into smaller workbooks.

If the spreadsheet is rejected, read the Spreadsheet Format Review report and correct the worksheet structure, worksheet names, headers, or data layout.

If only some worksheets qualify, you may continue with qualified worksheets only.

The recommended practice is to abort and fix the workbook when practical.

If a duplicate spreadsheet message appears, search for the prior analytics load and delete it before reloading the corrected workbook.

If the final report shows data mismatches, review the original spreadsheet for mixed data types in the affected columns.

If the final report shows zero rows inserted for a standard spreadsheet load, treat the load as failed and review the error messages.

If the External API Configuration section does not appear, verify that Use External API Table is selected.

If an external API request fails, verify the External API URL, protocol version, API key, token, password, secret, timeout, and API Active setting.

If an external API view cannot be found, verify the exact Real View Name.

Check spelling, capitalization, underscores, schema names, periods, prefixes, suffixes, and all other characters.

If the API returns unexpected fields, compare the external view columns with the related sample worksheet columns.

If the sample worksheet and external view structures do not match, correct the sample workbook or the secured API view before using the source for analytics.

If the API returns an authorization error, confirm that the credentials are active and that the customer has granted access to the required secured views.

If the API request times out, verify customer connectivity and increase Timeout Seconds only when approved by technical personnel.

If Delete does not respond as expected, stop and report the issue for technical review before assuming the analytics records were removed.

SecurityAndAccess

This screen is controlled by security group 25.

Read access is required to open the screen.

Write access is required to upload, save, delete, and complete analytics load actions.

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

External API configuration should normally be completed by authorized IT technicians, system administrators, or customer technical personnel.

API keys, tokens, passwords, and secrets must be handled as confidential security information.

Do not place API credentials inside the sample workbook, worksheet names, column headers, descriptions, or other user visible fields.

The customer API should provide access only to approved secured views.

The customer API should not provide unrestricted database access or direct access to unapproved production tables.

Real View Names should identify approved secured API views rather than unrestricted customer database objects.

Access to external payroll, accounting, financial, customer, employee, inventory, and operational data must follow the customer's security and privacy requirements.

Set API Active to No when an external API configuration should not be available for Chat Analytics requests.

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.

Document Category provides a broad classification for the document and helps organize similar content together. Examples include Policy, Procedure, Manual, Standard, Training, Report, Contract, Reference, and Compliance.

Document Subject identifies the primary topic of the document. Use a clear business description rather than a short code. Examples include Tenant Move In Procedures, Monthly Financial Reporting, Vendor Approval Process, Work Order Management, and Employee Onboarding.

Search Keyword 1, Search Keyword 2, and Search Keyword 3 provide additional search terms that users may enter when looking for the document. Think about the words someone would naturally type into a search box. Examples include Accounting, General Ledger, Month End, Payroll, Tenant, Lease, Inventory, Warehouse, Procurement, Vendor, Compliance, Safety, and Training.

Physical Location is optional and may be used when a paper copy, binder, file cabinet, records box, or other physical document storage location exists. Examples include Accounting Cabinet A Drawer 3, Records Room Box 14, Operations Binder 5, and Human Resources Shelf 2. Leave this field blank if no physical copy exists.

These fields are primarily used by the Document Search and Document Management functions. Completing them consistently makes documents easier to locate, organize, filter, review, and maintain as the document library grows.

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

Corporate Intelligence System

Home ?

Ask for Help...

Chat with Me

Screen Name: SN_IngestProgram

Description: SN_IngestProgram

File Books Screens Procedure Documents Book Viewing Word Control Ingest Documents Chat With Me Other Functions Utilities Admin

Load Program Files

Upload supported source code, script, markup, SQL, configuration, or text-based program files to ingest technical content into the AI knowledge system. The program will extract source text, split it into structured parse files, and prepare it for the AI Chat Agent. Use the Search pane to locate existing records to Select or Delete. To load new program files, identify the fields below.

NOTE: Applying the best display name, program type, program unit name, audience, and business domain for the file will significantly improve AI Chat Agent responses and retrieval accuracy.

If you receive a timeout message or an error of Limit Incomplete or Error, refer to the documentation. Press the > next to the Home button for instructions. Large program files can take from 2 to 60 minutes depending on size to process. Do not press Save again. Wait for a message to appear at the top of the screen. Program files more than 10k characters will be divided into multiple parse runs.

Selector

Action

Search to Delete Apply Selection Select Press Select when done.

Date From 01/01/2026 Date To 12/01/2026

Any Text a

Search Reset

Actions	DocumentID	Date	Source Name	Display Name	Description
Select	16	04/12/2026	Load Spreadsheets for AI C...	Load Spreadsheets for AI C...	Load Spreadsheets for chunking ...

Figure: Search for Select.

Home ?

Ask for Help...

Chat with Me

Screen Name

SN_IngestProgram

Description

SN_IngestProgram

Your upload was divided into 22 files for processing. You will likely need about 2 resume steps to finish processing this document. Estimated total processing time is about 14.62818 minutes.

File

Books Chapters

Screens Documents

Procedure Documents

Book Viewing

Word Control

Ingest Documents

Chat With Me

Other Functions

Utilities

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Load Program Files

Upload supported source code, script, markup, SQL, configuration, or text-based program files to ingest technical content into the AI knowledge system. The program will extract source text, split it into structured parse files, and prepare it for the AI Chat Agent. Use the Search pane to locate existing records to Select or Delete. To load new program files, identify the fields below.

NOTE: Applying the best display name, program type, program unit name, audience, and business domain for the file will significantly improve AI Chat Agent responses and retrieval accuracy.

If you receive a timeout message or an error of Limit Incomplete or Error, refer to the documentation. Press the > next to the Home button for instructions. Large program files can take from 2 to 60 minutes depending on size to process. Do not press Save again. Wait for a message to appear at the top of the screen. Program files more than 10k characters will be divided into multiple parse runs.

Selector

Action

Add New

Apply Selection

Select

Press Select when done.

Select File

Choose File

No file chosen

Upload

Allowed file types: PDF, DOCX, RTF

Uploaded File: SN_IngestEmail_20260412_183301.php

Save

Clear

Program Guidance

Document Format

PROGRAM_DOCUMENT

Audience

Unassigned

Display Name

Program Type

PHP

Program Unit Name

Business Domain

Unassigned

Optional. Enter a main function, class, procedure, module, or unit name when known.

Or enter custom Business Domain

Select from the list or type a custom Business Domain.

Document Description

Describe what the program or source file does, what business or technical purpose it serves, and the kind of logic, processing, or workflow it supports. This improves AI retrieval and interpretation.

Include important routines, modules, classes, functions, procedures, SQL objects, imports, includes, configuration areas, or execution behavior when known. The AI will use this together with Program Type, Display Name, Audience, Business Domain, and Program Unit Name.

SAMPLE DESCRIPTION: This program loads inbound files, converts them into normalized text, segments the text into smaller parser-ready files, and returns a processing queue for downstream API ingest. It includes file-type routing, program-type aware splitting, output-file creation, and support logic for chunk-oriented AI retrieval workflows.

Figure: Upload Program File.



Corporate Intelligence System

Home

?

Ask for Help...

Q

Chat with Me

...

Screen Name

SN_IngestProgram

Description

SN_IngestProgram

All converted files were parsed successfully.

File

Books Chapters

Screens Documents

Procedure Documents

Book Viewing

Word Control

Ingest Documents

Chat With Me

Other Functions

Utilities

Admin

Chunk Database Preparation

We have completed the parsing of the document and we are ready to prepare this parsing and prepare the database so the ai chat agent can use this data press below to start this process

Process for DB

Load Program Files

Upload supported source code, script, markup, SQL, configuration, or text-based program files to ingest technical content into the AI knowledge system. The program will extract source text, split it into structured parse files, and prepare it for the AI Chat Agent. Use the Search pane to locate existing records to Select or Delete. To load new program files, identify the fields below.

NOTE: Applying the best display name, program type, program unit name, audience, and business domain for the file will significantly improve AI Chat Agent responses and retrieval accuracy.

If you receive a timeout message or an error of Limit Incomplete or Error, refer to the documentation. Press the > next to the Home button for instructions. Large program files can take from 2 to 60 minutes depending on size to process. Do not press Save again. Wait for a message to appear at the top of the screen. Program files more than 10k characters will be divided into multiple parse runs.

Selector

Action

Add New

▼

Apply Selection

Select

Press Select when done.

Select File

Choose File

No file chosen

Allowed file types: PDF, DOCX, RTF

Upload

Uploaded File: SN_IngestEmail_20260412_185623.php

Figure: Commit Parse to Database Chunks.

The screenshot displays the 'Corporate Intelligence System' interface. At the top, there is a navigation bar with a 'Home' button and a search bar labeled 'Ask for Help...'. Below this, a red notification message states: 'Chunk processing completed successfully. You may now build vectors.' A horizontal menu contains various options: File, Books Chapters, Screens Documents, Procedure Documents, Book Viewing, Word Control, Ingest Documents, Chat With Me, Other Functions, Utilities, and Admin.

The main content area is divided into two sections:

- Vector Preparation:** A message states, 'The database has been prepared now we need to vector the data so that the ai chat agent can evaluate relevant data to a user request press below to start this process'. Below this is a button labeled 'Process for Vector'.
- Load Program Files:** A message explains that supported source code, script, markup, SQL, configuration, or text-based program files can be ingested into the AI knowledge system. It provides instructions on how to use the Search pane and notes that applying the best display name, program type, program unit name, audience, and business domain will improve AI Chat Agent responses. It also mentions that large program files can take 2 to 60 minutes to process and that files over 10k characters will be divided into multiple parse runs.

Below the 'Load Program Files' section is a 'Selector' box with an 'Action' dropdown menu set to 'Add New'. To the right of the dropdown are buttons for 'Apply Selection' and 'Select' (with a checkmark icon). A note next to the 'Select' button says 'Press Select when done.' Below the 'Selector' box is a 'Select File' section with a 'Choose File' button, a text field showing 'No file chosen', and an 'Upload' button. Below the text field, it says 'Allowed file types: PDF, DOCX, RTF' and 'Uploaded File: SN_IngestEmail_20260412_185623.php'.

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.

700.000 - Load Images for Document Management System

Screen | 2026-06-03 15:14:46 SN_IngestImage

700.000 Load Images for Document Management System

Purpose

Use this screen to load image files into the Document Management System for record retention, historical reference, and future document search.

This screen is intended for image-based records such as photographs, receipts, invoices, checks, signed forms, identification cards, permits, licenses, inspection photos, property photos, equipment photos, screenshots, scanned correspondence, and other image documents that should be retained.

Images loaded through this screen are stored as document records and may be searched, reviewed, downloaded, or deleted later.

This screen does not load images into the AI Chat Agent knowledge base.

Images loaded here are not parsed, chunked, vectorized, or made available for question-and-answer retrieval by the Chat Agent.

The purpose of this screen is document retention and document search, not AI knowledge ingestion.

Image-to-text conversion can vary based on image quality, resolution, handwriting, lighting, scan quality, layout, and other factors.

For that reason, this process stores the image as a searchable document record instead of automatically converting the image into AI Chat Agent content.

Processing

This screen has two main paths.

The first path is Search Images. This path allows the user to search existing image document records, review the results in a grid, download stored image files, or delete image records that are no longer needed.

The second path is Upload Image File. This path allows the user to upload an image file, complete the detail pane, and save the image as a permanent document management record.

At the top of the screen, the user selects an Action and presses Select.

If Upload Image File is selected, the upload pane appears so an image file can be selected and uploaded.

After a successful upload, the detail pane appears.

The user must complete the required detail fields before pressing Save.

When Save is pressed, the system creates the document record, creates the source record, moves the file from temporary upload storage to permanent document file storage, and makes the image available for document search and download.

The image is not sent to parse processing.

The image is not split into chunks.

The image is not vectorized.

If Search Images is selected, the search pane appears with filters for document type, text, dates, business domain, document category, document subject, and search keywords.

The document type is protected as IMAGE so this screen only works with image records.

Search results display in a grid with available actions such as Download and Delete.

WhereToFind

Main Menu to Chat or Document Management to Load Images for Document Management System.

Images

Sistema de Inteligencia Corporativa

Inicio Ayuda de Pantalla ?

Buscar Ayuda en el Manual

Chat

Pantalla: SN_IngestImage

Descripcion: SN_IngestImage

La imagen fue cargada correctamente. Complete la informacion del documento y luego presione Guardar.

Archivo

Chat

Libros y Capítulos

Documentos de Pantallas

Documentos de Procedimientos

Visualización de Libros

Procesar Documentos

Control de IA

Control de Búsqueda

Utilidades

Carga de Imágenes para el Sistema de Gestión de Documentos

Use esta función para guardar archivos de imagen en el Sistema de Gestión de Documentos para conservar registros, mantener evidencia histórica y poder consultarlos en el futuro. Las imágenes cargadas en esta pantalla se guardan como documentos buscables y luego se pueden localizar usando la función Lista de Documentos disponible desde el menú principal de Chat.

Esta función se usa para guardar documentos en imagen, como fotos, recibos, facturas, cheques, formularios firmados, tarjetas de identificación, permisos, licencias, fotos de inspección, fotos de propiedades, fotos de equipos, capturas de pantalla, correspondencia escaneada, registros históricos y otros documentos en imagen que deban conservarse para referencia futura.

Las imágenes cargadas en esta pantalla no se procesan como conocimiento del Agente IA de Chat y no estarán disponibles para preguntas y respuestas dentro del Agente IA de Chat. El propósito de esta función es conservar documentos, organizar documentos y permitir búsquedas de documentos, no convertir imágenes en conocimiento para el Agente IA.

La conversión de imagen a texto puede variar según la calidad de la imagen, la resolución, la letra escrita a mano, la iluminación, la calidad del escaneo, el formato del documento y otros factores. Por esa razón, las imágenes se guardan como registros de documentos buscables en lugar de convertirse automáticamente en contenido de conocimiento para el Agente IA.

Cuando sea posible, escriba un Nombre para Mostrar, Descripción, Categoría, Asunto, Palabras Clave, Identificadores de Búsqueda y Ubicación Física claros. La información clara y correcta del documento ayuda mucho a encontrar y recuperar estos documentos en búsquedas futuras. Use el panel de Búsqueda para localizar registros existentes para verlos, descargarlos o eliminarlos.

NOTA: Esta función pertenece al Sistema de Gestión de Documentos y se usa para conservar y recuperar documentos. Los documentos guardados por esta función quedan disponibles en el sistema de búsqueda de documentos, aunque no se usen como base de conocimiento del Agente IA de Chat.

Si recibe un error, consulte la documentación usando el símbolo > junto al botón Home.

Selector

Acción

Cargar Archivo de Imagen

Aplicar Selección

Seleccionar

Presione Seleccionar cuando termine.

Seleccione Archivo de Imagen

Choose File No file chosen

Tipos permitidos: JPG, JPEG, PNG, GIF, WEBP, BMP, TIF, TIFF

Archivo Cargado: ChatGPT_Image_Jun_3_2026_03_43_32_PM_20260603_210448.png

Cargar

Guardar Cancelar

Información del Documento de Imagen

Tipo de Documento IMAGE

Audiencia Todos

Nombre para Mostrar Factura de Acme Web Development

Fecha del Documento 06/03/2026

Contabilidad

Dominio de Negocio O escriba un Dominio de Negocio personal

Seleccione de la lista o escriba un Dominio de Negocio personalizado.

Categoría del Documento Factura

Asunto del Documento

Palabra Clave 1 Acme

Palabra Clave 2 Factura

Palabra Clave 3 Web Developme

Ubicación Física Ubicación opcional del archivo físico, caja, gabinete, oficina o carpeta

Descripción del Documento Factura de Acme Web Development para el desarrollo del web de la compañía

Sea muy descriptivo. Esta información ayuda a encontrar la imagen después usando la búsqueda de documentos.

EJEMPLO DE DESCRIPCIÓN: Este archivo de imagen se guarda como registro del sistema de gestión de documentos para conservación y referencia futura. Describa lo que muestra la imagen, la persona, propiedad, proveedor, cuenta, evento, documento, fecha, ubicación y cualquier otro dato que ayude a encontrarla después.

Figure: Load Images for Document Management System screen.

ButtonsAndActions

Select applies the action selected at the top of the screen.

Upload Image File opens the image upload path.

Search Images opens the image search and maintenance path.

Upload sends the selected image file to the temporary upload area and prepares the detail pane for completion.

Save validates the detail pane, creates the image document record, creates the source record, moves the uploaded file to permanent document file storage, and saves the image record.

Cancel clears or cancels the current detail entry depending on the screen state.

Search runs the search filters and displays matching image records in the grid.

Reset clears the search fields and prepares the screen for a new search.

Download opens or downloads the stored image file for review.

Delete removes the selected image document record, removes the related source record, and deletes the stored physical image file when it exists.

FieldsOrSettings

Action selects the workflow path for the screen.

Document Type is protected as IMAGE and cannot be changed by the user.

Audience identifies who the image record is intended for.

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

Document Date identifies the date associated with the image record.

Business Domain classifies the business area for the image, such as accounting, operations, maintenance, property management, compliance, legal, administration, training, or another business topic.

Custom Business Domain may be used when the correct business domain is not available in the dropdown list.

Document Category provides a broad classification for the image record, such as Receipt, Invoice, Check, Signed Form, Permit, License, Inspection Photo, Property Photo, Equipment Photo, Screenshot, Identification, Correspondence, or Historical Record.

Document Subject identifies the primary topic of the image.

Search Keyword 1, Search Keyword 2, and Search Keyword 3 provide additional search words that users may use later when looking for the image.

Physical Location is optional and may identify a paper file, box, cabinet, room, binder, folder, or other physical storage location related to the image.

Document Description is required and should clearly explain what the image shows, why it is being retained, and how users may search for it later.

A good description should mention the related person, property, vendor, account, date, event, location, document type, or business purpose when applicable.

The description is especially important because this screen does not use OCR or image-to-text conversion for AI retrieval.

Clear descriptions and search keywords make the image easier to find in the Document Management System.

SearchFields

Text searches across document names, descriptions, business domain, category, subject, search identifiers, file names, and related searchable document fields.

Fecha Desde and Fecha Hasta may be used to limit the search by document date.

Business Domain filters the image list to one business area.

Document Category filters the image list to one category.

Document Subject filters the image list to one subject.

Search Keyword 1, Search Keyword 2, and Search Keyword 3 filter the image list by stored search identifiers.

The search grid displays matching image documents and allows the user to download or delete selected image records.

KeysAndScope

This screen stores image files as document management records.

The document type is IMAGE.

The upload is first stored in a temporary upload folder.

When the user saves the detail pane, the file is moved into permanent document file storage.

The system creates an AI_Document_Table record and an AI_Source_Table record for the image.

The file name and storage path are saved with the document record so the image can be downloaded later.

This screen is not intended for PDFs, Word documents, spreadsheets, email messages, procedures, screen help, or large text documents.

RulesAndValidations

An image file must be selected before Upload is pressed.

Allowed image file types include JPG, JPEG, PNG, GIF, WEBP, BMP, TIF, and TIFF.

The image file must not exceed the configured image upload size limit.

Document Type must remain IMAGE.

Display Name is required.

Business Domain is required.

Document Category is required.

Document Description is required.

The uploaded file must exist in the temporary upload folder before Save can complete.

The permanent document file storage folder must be available so the file can be moved.

If the file move fails, the document should not be treated as successfully saved.

Delete is limited to IMAGE records from this screen.

If the stored physical file is already missing, the document and source records may still be deleted so the system does not keep an orphaned record.

DownstreamEffects

Upload places the selected image in temporary upload storage.

Save creates the permanent document and source records and moves the image to permanent document file storage.

The saved image becomes searchable in the Document Management System and may be found later through document list and image search functions.

The saved image does not create chunks.

The saved image does not create vectors.

The saved image is not used by the AI Chat Agent for question-and-answer retrieval.

Delete removes the image document record, removes the related source record, and deletes the stored physical file when it exists.

Examples

Example 1: Upload a signed form so the image can be retained and downloaded later for audit or review.

Example 2: Upload a receipt image and enter vendor, date, business domain, category, and search keywords so accounting staff can find it later.

Example 3: Upload a property inspection photo and describe the property, location, condition, date, and reason for retention.

Example 4: Upload a screenshot that documents a system setting, error, confirmation, or business event.

Example 5: Search for an older image by keyword, category, date range, or business domain, then download it for review.

Troubleshooting

If Action is required appears, select Upload Image File or Search Images and press Select.

If no file selected appears, choose an image file before pressing Upload.

If the file type is rejected, confirm that the file is JPG, JPEG, PNG, GIF, WEBP, BMP, TIF, or TIFF.

If the file is too large, reduce the image size or save it in a smaller image format and upload again.

If the temporary upload file is missing, upload the file again before pressing Save.

If validation fails, review the detail pane and complete the required fields.

If Document Description is missing, write a clear description of what the image shows and why it is being retained.

If the file cannot be moved to permanent storage, confirm that the document file upload directory is available and that the system has permission to write to it.

If Delete fails, confirm that the selected record is an IMAGE document and that the user has write access.

SecurityAndAccess

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

Read access is required to open and view the screen.

Write access is required to upload, save, or delete image documents.

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

Corporate Intelligence System

Home ?

Ask for Help...

Screen Name: SN_SearchConfig

Description: SN_SearchConfig

Chat with Me

File Books Chapters Screens Documents Procedure Documents Book Viewing Ingest Documents Chat With Me AI Control Search Control Other Functions Utilities

This are the parameters that control the sarch engine any minor change can cause massive issues make sure you know what you are doing before changing

Search for: Search Search Reset Reset to Default

Retrieved 15 Records

Select	ConfigKey	ConfigVal
Select	search.idfFloor	0.1
Select	search.maxAllLimit	500
Select	search.maxCandidateDocs	5000
Select	search.pageSizeOptions	25,50,100,All
Select	search.phraseBoost	1.25
Select	search.resultLimitDefault	25
Select	search.snippet.fallbackLines	3
Select	search.snippet.maxLength	240
Select	search.snippet.preferHitLines	2
Select	search.weights.alt	0.5
Select	search.weights.body	1.0
Select	search.weights.chapter	1.5
Select	search.weights.meta	1.2
Select	search.weights.section	2.0
Select	search.weights.title	5.0

Save Clear

ConfigKey: search.idfFloor ConfigVal: 0.1

Default Value: 0.1 Limits: 0.0 to 1.0

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

Corporate Intelligence System

Home ?

Ask for Help...

Screen Name
SN_SearchStopwords

Description
SN_SearchStopwords

Chat with Me

File
Books
Chapters
Screens
Documents
Procedure
Documents
Book
Viewing
Ingest
Documents
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With Me
AI
Control
Search
Control
Other
Functions
Utilities

Stopwords are very common words (e.g., 'the', 'and') the search engine ignores during indexing and ranking to improve speed and relevance; use the Search box to filter by *Token*, click *Select* to edit, and set *Language* (default 'en'), *IsActive* (Y/N), and *Source* (system/custom); changes affect how queries are matched—activate only words that should be ignored.

Search for:
Search
Search Reset
Add
First Prev Page 2 of 9 Next Last

Retrieved 20 of 174 — Page 2 of 9

Select	Token	Language	IsActive	Source	Editor	LastDate
Select	below	en	Y	system	ivan	0000-00-00 00:00:00
Select	between	en	Y	system	ivan	0000-00-00 00:00:00
Select	both	en	Y	system	ivan	0000-00-00 00:00:00
Select	but	en	Y	system	ivan	0000-00-00 00:00:00
Select	by	en	Y	system	ivan	0000-00-00 00:00:00
Select	can't	en	Y	system	ivan	0000-00-00 00:00:00
Select	cannot	en	Y	system	ivan	0000-00-00 00:00:00
Select	could	en	Y	system	ivan	0000-00-00 00:00:00
Select	couldn't	en	Y	system	ivan	0000-00-00 00:00:00
Select	did	en	Y	system	ivan	0000-00-00 00:00:00
Select	didn't	en	Y	system	ivan	0000-00-00 00:00:00
Select	do	en	Y	system	ivan	0000-00-00 00:00:00
Select	does	en	Y	system	ivan	0000-00-00 00:00:00
Select	doesn't	en	Y	system	ivan	0000-00-00 00:00:00
Select	doing	en	Y	system	ivan	0000-00-00 00:00:00
Select	don't	en	Y	system	ivan	0000-00-00 00:00:00
Select	down	en	Y	system	ivan	0000-00-00 00:00:00
Select	during	en	Y	system	ivan	0000-00-00 00:00:00
Select	each	en	Y	system	ivan	0000-00-00 00:00:00
Select	few	en	Y	system	ivan	0000-00-00 00:00:00

Save Delete Clear

Token below Language en

IsActive Y Source system

Editor ivan LastDate 0000-00-00 00:00:00

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

Corporate Intelligence System

Home ?

Ask for Help...

Chat with Me

Screen Name
SN_SearchSynonyms

Description
SN_SearchSynonyms

File Books Chapters Screens Documents Procedure Documents Book Viewing Ingest Documents Chat With Me AI Control Search Control Other Functions Utilities

Synonyms link two or more words that should be treated the same in search; each set shares a *SynGroupID*, so a query term expands to all tokens in its group (e.g., 'pay' ↔ 'disburse').

Search for: Search Search Reset Add First Prev Page 3 of 11 Next Last

Retrieved 20 of 218 — Page 3 of 11

Select	Group	Token
Select	12	nnn
Select	13	expenses
Select	13	operating
Select	13	opex
Select	14	reconcile
Select	14	reconciliation
Select	14	trueup
Select	15	activate
Select	15	begin
Select	15	enable
Select	15	start
Select	16	cancel
Select	16	end
Select	16	terminate
Select	17	extend
Select	17	extension
Select	17	renew
Select	17	renewal
Select	18	assign
Select	18	assignment

Save Delete Cancel

SynGroupID Token

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

Corporate Intelligence System

Home ?

Ask for Help...

Screen Name
SN_SearchBypass

Description
SN_SearchBypass

Chat with Me

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Documents
Book
Viewing
Ingest
Documents
Chat
With Me
AI
Control
Search
Control
Other
Functions
Utilities

Bypass tokens control how a word is handled in search: set *IsBypass*="Y" to strip noise early (e.g., '<a>'), use *IsStopword*="Y" to ignore it for scoring; *TokenID* is auto-assigned and *DocFreq* is read-only (starts at 0).

Search for:
Search
Search Reset
Add
First
Prev
Page 2 of 25
Next
Last

Retrieved 20 of 500 — Page 2 of 25 — There may be more records refine your criteria

Select	TokenID	Token	DocFreq	IsStopword	IsBypass
Select	1080	5	3	N	N
Select	1299	500	2	N	N
Select	1177	6	0	N	N
Select	1453	600	1	N	N
Select	1148	7	3	N	N
Select	1062	abbreviations	0	N	N
Select	995	ability	0	N	N
Select	1203	able	8	N	N
Select	1186	abort	3	N	N
Select	47	access	17	N	N
Select	361	accessed	1	N	N
Select	343	accessible	3	N	N
Select	906	accessing	1	N	N
Select	874	accompanying	1	N	N
Select	1020	accordingly	0	N	N
Select	938	account	2	N	N
Select	300	accounting	8	N	N
Select	330	accuracy	5	N	N
Select	442	accurate	2	N	N
Select	477	across	2	N	N

Delete
Cancel

TokenID
1080
Token
5
DocFreq
3
IsStopword
N
IsBypass
N

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

The screenshot shows the 'Corporate Intelligence System' interface. At the top, there is a navigation bar with a 'Home' button and a search bar labeled 'Ask for Help...'. Below this is a horizontal menu with various categories: File, Books Chapters, Screens Documents, Procedure Documents, Book Viewing, Ingest Documents, Chat With Me, AI Control, Search Control, Other Functions, and Utilities. The 'Search Control' category is selected, leading to the 'Search Query Log' screen. This screen has a yellow header bar stating: 'Search Query Log shows search-term frequency by day; filter by date range or text; results include a snippet.' Below the header, there are two input boxes for 'Search for:', a 'Search' button, a 'Search Reset' button, and a 'Reset Log' button. To the right of these buttons are pagination links: 'First', 'Prev', 'Page 1 of 1', 'Next', and 'Last'. The main content area displays a table with 9 rows of search results. The table has columns for 'Date', 'User', 'Query', 'Results', and 'Latency (ms)'. The data shows various search queries like 'metadata', 'Book', 'menu', and 'navigation' performed by a user named 'ivan' on different dates in March 2026.

Date	User	Query	Results	Latency (ms)
2026-03-03 00:51:39	ivan	metadata	9	16
2026-03-02 23:46:56	ivan	Book	7	10
2026-03-02 23:44:54	ivan	Book	7	64
2026-03-01 18:35:17	ivan	menu	1	16
2026-03-01 18:32:37	ivan	menu	1	14
2026-03-01 18:21:36	ivan	menu	1	65
2026-03-01 18:21:27	ivan	navigation	1	54
2026-03-01 18:20:38	ivan	navigation	1	7
2026-03-01 18:18:45	ivan	navigation	1	42

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

Operating Manual

 Corporate Intelligence System

Home ?

Ask for Help...

Q

Chat with Me

Screen Name

SN_SearchStats

Description

SN_SearchStats

[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 XLSX 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
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SCR	IntroSystem	System Introduction	850
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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

The screenshot shows the 'Search Index Maintenance Control' screen. At the top, there's a header bar with the 'Corporate Intelligence System' logo, a 'Home' button, a search bar labeled 'Ask for Help...', a 'Chat with Me' button, and fields for 'Screen Name' and 'Description', both containing 'SN_SearchIndex'. Below the header is a navigation menu with tabs: File, Books Chapters, Screens Documents, Procedure Documents, Book Viewing, Ingest Documents, Chat With Me, AI Control, Search Control, Other Functions, and Utilities. The main content area has instructions: 'Choose an action and optional settings below. For single document actions, select the type and enter the exact name. Use Process Reindex Queue to handle pending items in batches. Use Include Unassigned if you want to index legacy or test content. Note: To clear and rebuild the index, choose Rebuild All and leave Smart unchecked.' The form includes an 'Action' dropdown menu set to 'Smart Rebuild', checkboxes for 'Include Unassigned' and 'Dry Run (No Writes)' (both unchecked), and a 'Smart Rebuild' checkbox which is checked. A 'Save' button is at the bottom.

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



Corporate Intelligence System

[Home](#)
?

Screen Name

Description

Q

[Chat with Me](#)
...

File
Chat With Me
Books Chapters
Screens Documents
Procedure Documents
Book Viewing
Ingest Documents
AI Control
Search Control
Other Functions
Utilities

AI Stop Words are common or non-meaningful terms that should be ignored during AI keywording, indexing, or search support. Use the Search box to filter by *WordText* or *WordNorm*, click *Select* to edit, and maintain *WordText*, *WordNorm*, *Category*, and *Active*. Category defaults to GENERAL. Changes affect how words are ignored during processing.

Search for:

Retrieved 1 to 20 of 199 - Page 1 of 10

Active: All

[Search](#)
[Search Reset](#)
[Add](#)

[First](#)
[Prev](#)
Page 1 of 10
[Next](#)
[Last](#)

Select	ID	WordText	WordNorm	Category	Active	Editor	LastDate
Select	1001	a	a	GENERAL	Y	SYS	0000-00-00 00:00:00
Select	1002	about	about	GENERAL	Y	ivan	2026-04-16 16:47:00
Select	1003	above	above	GENERAL	Y	SYS	0000-00-00 00:00:00
Select	1004	after	after	GENERAL	Y	SYS	0000-00-00 00:00:00
Select	1005	again	again	GENERAL	Y	SYS	0000-00-00 00:00:00
Select	1006	against	against	GENERAL	Y	SYS	0000-00-00 00:00:00
Select	1007	all	all	GENERAL	Y	SYS	0000-00-00 00:00:00
Select	1008	am	am	GENERAL	Y	SYS	0000-00-00 00:00:00
Select	1009	an	an	GENERAL	Y	SYS	0000-00-00 00:00:00
Select	1010	and	and	GENERAL	Y	SYS	0000-00-00 00:00:00
Select	1011	any	any	GENERAL	Y	SYS	0000-00-00 00:00:00
Select	1012	are	are	GENERAL	Y	SYS	0000-00-00 00:00:00
Select	1013	aren't	aren't	GENERAL	Y	SYS	0000-00-00 00:00:00
Select	1176	article	article	HTML	Y	SYS	0000-00-00 00:00:00
Select	1014	as	as	GENERAL	Y	SYS	0000-00-00 00:00:00
Select	1177	aside	aside	HTML	Y	SYS	0000-00-00 00:00:00
Select	1015	at	at	GENERAL	Y	SYS	0000-00-00 00:00:00
Select	1178	b	b	HTML	Y	SYS	0000-00-00 00:00:00
Select	1016	be	be	GENERAL	Y	SYS	0000-00-00 00:00:00
Select	1017	because	because	GENERAL	Y	SYS	0000-00-00 00:00:00

[Save](#)
[Delete](#)
[Clear](#)

StopWordID

WordText

WordNorm

LastDate

Category

ActiveSw Y

Editor

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

PlatformSolutionsResourcesOpen SourceEnterprisePricing

globalwordnet/english-wordnet

CodeIssues31Pull requests7DiscussionsActionsProjectsSecurity and qualityInsights

main40 Branches8 Tags

Search or jump to...

Code

prccrae Merge pull request #1271 from globalwordnet/issue-1267Stats · 3 weeks ago · 2,084 Commits

github

Change project name to Open English Wordnet2 years ago

scripts

Fix some bugs in the WordNet conversion scripts3 months ago

src

Remove 'unintentional' from synset of 'intentional'last month

github/bot

Fix all syntax keys6 years ago

g8ignore

Merge branch '2025-release-candidate' into issue-11264 months ago

CONTRIBUTING.md

Update build instructions2 years ago

DICTIONARIES.md

Change project name to Open English Wordnet2 years ago

EDITING.md

Change project name to Open English Wordnet2 years ago

FORMAT.md

Update the IDs to English WordNet7 years ago

LICENSE.md

Avoid PWN 3.0 mention in LICENSE4 months ago

NEW_SYNETS.md

Update NEW_SYNETS.mdd last year

README.md

Update readme instructions2 months ago

RELEASING.md

Create 2025 Release Candidate4 months ago

TOOLS.md

Change project name to Open English Wordnet2 years ago

WNER_license.txt

Update to 2021 release2 years ago

apply_dupes.py

Merge branch 'main' of github.com:globalwordnet/english-w...last year

ctabon.bib

Add changes from Francis Bond's repo4 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

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. Correspondence to previous versions and wordnets in other language is provided through the [Collaborative Interlingual Index \(CII\)](#). The Open English Wordnet is available as individual files in [GDF/LSJF](#) format.

Since the 2025 release, Open English Wordnet is also released along with [Open English Nameret](#), 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 Nameret 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 Nameret: The full set of proper nouns from Open English Nameret.

Releases

Open English Wordnet is released through the [Open English Wordnet website](#). The versions released are

2025 Edition (Released 31st December 2025) [\(LMF\)](#) [\(GDF\)](#) [\(CII\)](#) [\(WNER\)](#)

2025 Plus (Released 31st December 2025) [\(LMF\)](#) [\(GDF\)](#) [\(CII\)](#) [\(WNER\)](#)

2024 Edition (Released 1st November 2024) [\(LMF\)](#) [\(GDF\)](#) [\(CII\)](#) [\(WNER\)](#)

2023 Edition (Released 31st October 2023) [\(LMF\)](#) [\(GDF\)](#) [\(CII\)](#) [\(WNER\)](#)

2022 Edition (Released 31st December 2022) [\(LMF\)](#) [\(GDF\)](#) [\(CII\)](#) [\(WNER\)](#)

2021 Edition (Released 19th November 2021) [\(LMF\)](#) [\(GDF\)](#) [\(CII\)](#) [\(WNER\)](#)

2020 Edition (Released 17th April 2020) [\(LMF\)](#) [\(GDF\)](#) [\(CII\)](#) [\(WNER\)](#)

2019 Edition (Released 17th April 2019) [\(LMF\)](#) [\(GDF\)](#) [\(CII\)](#) [\(WNER\)](#)

The size of each resource is as follows

Edition	Words	Synsets	Relations
2025+	161,873	120,564	419,226
2024	161,705	120,630	419,168
2023	161,238	120,125	415,905
2022	161,221	120,068	386,427
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 `en_wd.wd` that contains the complete wordnet.

Further conversions are available through the converter [here](#)

[WNI](#) is a Python library that can be used to work with Open English Wordnet.

```
import wn
wn.download("token:2025+")
open = wn.WordNet("token: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 Rademakers, 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*, Wrocław

More recent papers describing it include

John Philip McCrae, Alexandre Rademakers, Ewa Rudnicka, Francis Bond (2020) [English WordNet 2020: Improving and Extending a WordNet for English using an Open Source Methodology](#). In *Proceedings of the UARC 2020 Workshop on Multimodal Wordnets (BMMW2020)*, Marseille

John P. McCrae, Michael Wayne Goodman, Francis Bond, Alexandre Rademakers, 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.

Merriam-Webster Online (2011) [Synonym Finder](#). In *Proceedings of the 7th Global WordNet Conference (GWC2011)*, University of South Africa (UNISA).

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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

Corporate Intelligence System

Home ?

Ask for Help...

Chat with Me

Screen Name: SN_AIHost

Description: AI Host Configuration

File Chat With Me Books Chapters Screens Documents Procedure Documents Book Viewing Ingest Documents AI Control Search Control Other Functions Utilities

AI Host Secure Token Maintenance

Purpose: This screen manages the secure OpenAI token file used by the system chat and vector integrations.

Security: This is a highly restricted administrative screen and is intended for authorized users only.

Editable Field: Only the API key may be changed here.

Protected Fields: Provider, Host, Chat Model, and Embed Model are shown for reference only and are not editable on this screen.

Key Handling: The current stored API key is never displayed. Enter a new key only when you want to replace the existing key.

Save Action: When a new key is saved, the current secure file should be backed up, the new key stored, and a log entry written in the secure log directory.

Cancel Action: Cancel clears the replacement key entry field only and does not update the secure file.

Current Secure Configuration

Provider openai	Host https://api.openai.com
Chat Model gpt-5.4	Embed Model text-embedding-3-large

Replace API Key

Enter a new API key below to replace the existing secure key. Leave the field blank and click Cancel if no change is needed.

New API Key

For security reasons, the current stored key is not displayed on this screen.

Save Cancel

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.

Confidential Implementation Notice

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.

The Basic Flow

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.

Why Performance Evaluation Matters

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.

Proprietary Processing Notice

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.

Performance Evaluation Overview

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.

Chat Performance Report

The Chat Performance Report presents a structured view of a conversation.

It includes session-level information, message-level review, and diagnostic summaries.

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
LastName	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

Page 1

Chat Performance Report - User ivan Conversation 1

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.

The Importance of Synonyms

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.

Synonym Recommendations

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.

Selected Results Review

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.

Continuous Improvement Approach

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.

User Level Improvements

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.

Administrative Improvements

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.

Strategic Value

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

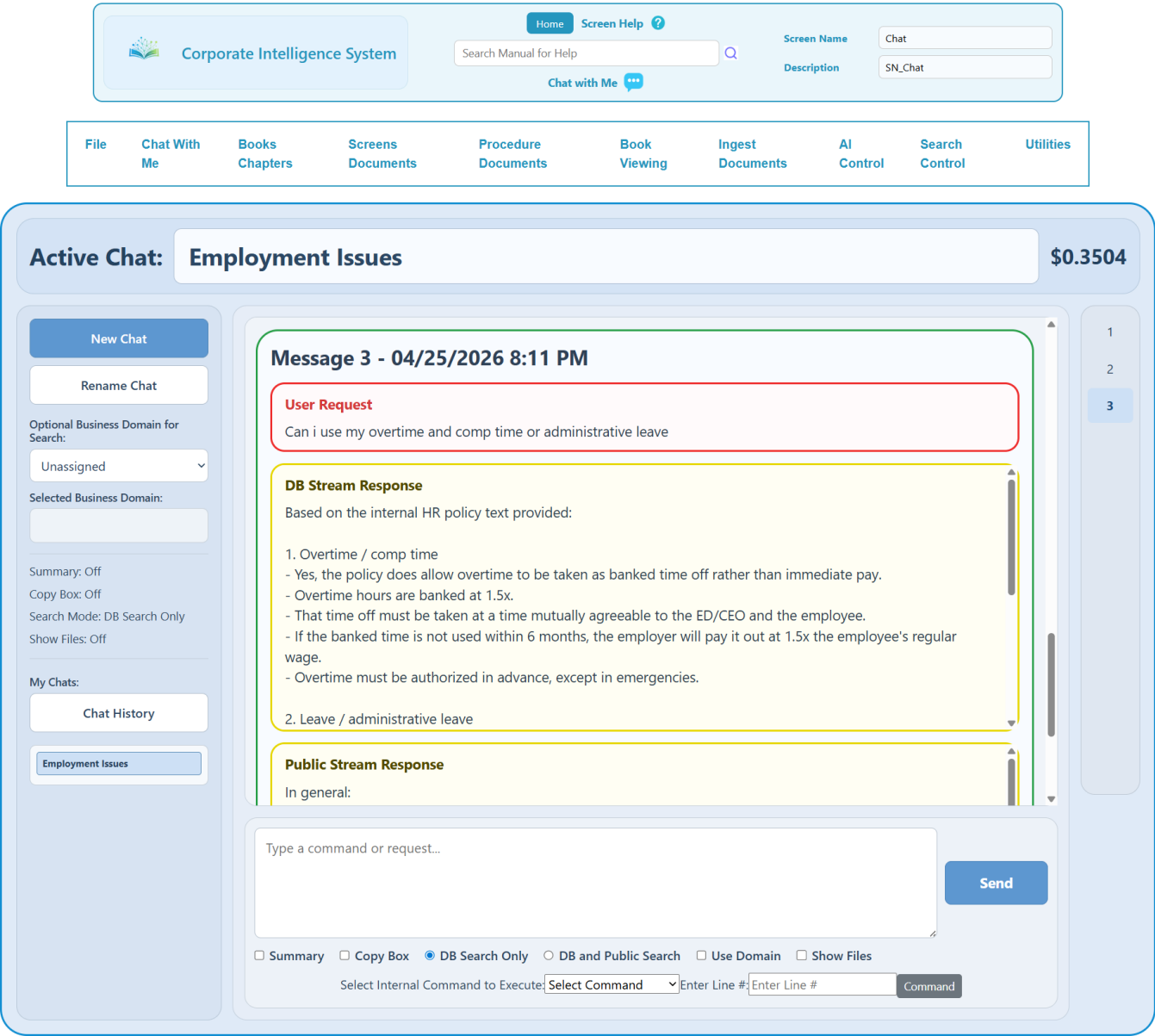


Figure: Main AI Chat Agent working screen.

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

Actions	UserID	ConversationID	ChatName	StartDate	LastName	Input Tokens	Output Tokens	Total Tokens
Select Delete Archive Run Report	ivan	1	Employment Issues	04/20/2026	04/25/2026	114709	4244	118953

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

Introduction

This screen serves as the document management center for the system.

When users upload files through the document ingestion screens, those files are cataloged and stored as document records.

Instead of leaving documents scattered across folders or relying on memory to locate them later, the system creates a searchable document library that can be accessed through this screen.

Users can search the document catalog by document type, business domain, document category, document subject, keywords, text, and date range.

When a matching document has an attached stored file, the user can open it through the document viewer and download the original file.

The quality of the document library depends heavily on the information entered when documents are uploaded.

Users should take the time to provide clear descriptions, accurate document subjects, appropriate business domains, meaningful document categories, and useful search keywords that describe the contents of the document.

The more accurately a document is classified, the easier it becomes for both users and the AI system to locate the correct information later.

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

Corporate Intelligence System

Home Screen Help ?

Search Manual for Help

Screen Name: SN_DocList

Description: SN_DocList

Chat with Me

File Chat With Me Books Chapters Screens Documents Procedure Documents Book Viewing Ingest Documents AI Control Search Control Utilities

Document List

Doc Type: All Document Types

From Date:

Business Domain: All Business Domains

Document Subject: All Subjects

Search Keyword 2: All Keyword 2

Any Text:

To Date:

Document Category: All Categories

Search Keyword 1: Accounting

Search Keyword 3: All Keyword 3

Cancel Search

Action	Doc Type	Source Name	Display Name	Description	File Name
Download PDF	PDF_DOCUMENT	Accounting and Financial Policies	Accounting and Financial Policies	This document is a structured Accounting and Fin...	D00000239_Accounting and Financ
Download PDF	XLSX_DOCUMENT	Monthly Expense Report	Monthly Expense Report	Spreadsheet with Monthly Expense Report by ye...	D00000235_Financials Sample Dat

Figure: Search and List Documents screen.

HumanAndAIRetrieval

This capability provides a significant benefit to the system because a single document repository

supports both human document retrieval and AI knowledge retrieval.

Users can quickly locate and download documents through the Search and List Documents screen while the AI system can use the same document records, descriptions, classifications, keywords, and stored content to improve search results, document indexing, knowledge retrieval, and answer generation.

This means users and the AI system work from the same organized document library rather than maintaining separate repositories.

As the document library grows, proper document descriptions, business domains, document categories, document subjects, and search keywords become increasingly important.

Well-classified documents are easier for users to find and easier for the AI system to understand and retrieve when answering questions.

The result is a more organized, searchable, and valuable knowledge repository that improves over time as additional documents are added.

Why This Screen Matters

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.

Search Area

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.

Business Domain limits results to documents assigned to a selected business area.

Document Category limits results to documents assigned to a selected category.

Document Subject limits results to documents assigned to a selected subject.

Search Keyword 1, **Search Keyword 2**, and **Search Keyword 3** limit results to documents that were tagged with those search terms when uploaded.

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.

MetadataFilters

The Business Domain, Document Category, Document Subject, and Search Keyword fields help users search documents by the way the document was classified when it was uploaded.

The dropdown lists only show values that already exist in the document table.

This helps users avoid guessing search terms that are not currently used in the document library.

These filters are useful when the user wants to locate documents by business area, document purpose, topic, or common search term.

AnyTextSearch

The Any Text field is useful when the user does not know the exact document type, category, subject, keyword, or date.

The search may match source names, display names, descriptions, business domains, document categories, document subjects, search keywords, 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. Select a Business Domain, Category, Subject, or Search Keyword if needed.
4. Enter payroll in Any Text if needed.
5. Enter a From Date and To Date if needed.
6. Press Search.
7. Review the grid results.
8. 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. Select a Business Domain, Category, Subject, or Search Keyword if needed.
3. Enter part of the subject, sender, recipient, or topic in Any Text.
4. Press Search.
5. Review the source name, display name, subject, sender, and recipient information.
6. 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. Select a Business Domain, Category, Subject, or Search Keyword if needed.
3. Enter the program name or related description in Any Text.
4. Press Search.
5. Review the grid for the matching source name or display name.
6. 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, subject line, document category, document subject, or search keyword.

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 search 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, business domain, category, subject, keyword, 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.

710.000 - How to Use Chat Analytics with AI

10.000 - Intro to the AI Chat Analytics Agent

Screen | 2026-07-19 00:00:00 A_ChatIntro

10.000 Introduction to the AI Chat Analytics Agent

Purpose

The AI Chat Analytics Agent allows users to ask business questions using ordinary English instead of writing SQL statements or creating reports manually.

The system combines Artificial Intelligence, SQL generation, business metadata, statistical analysis, and optional graph generation to produce executive level answers from business data.

The objective is to allow executives, managers, analysts, accountants, and business users to obtain meaningful answers from corporate information in seconds.

Overview

The Chat Analytics Agent is designed to analyze structured business information.

Unlike a general AI chatbot, the Chat Analytics Agent works only with approved Analytics Tables that have been prepared for analytical processing.

Every answer is based upon actual business data rather than general knowledge.

The system retrieves the required information, performs the requested analysis, and returns a documented response that includes complete processing transparency.

Two Types Of Analytics Tables

The Chat Analytics Agent supports two different types of Analytics Tables.

The first type is a Standard Analytics Table.

The second type is a Real Time API Analytics Table.

Standard Analytics Tables

Standard Analytics Tables are created from uploaded Excel spreadsheets.

The spreadsheet is analyzed and converted into an internal SQL table within the Corporate Intelligence System.

After the spreadsheet has been loaded, the Chat Analytics Agent performs all analysis directly against the internal SQL table.

This method is ideal for historical analysis, budgets, financial statements, operational summaries, inventory snapshots, forecasting, and other datasets that do not change continuously.

Real Time API Analytics Tables

Real Time API Analytics Tables provide direct access to customer business systems without importing the production database into the Corporate Intelligence System.

Instead of copying the customer's operational data, the system connects to secured customer supplied API views.

The customer controls exactly what information is exposed by creating secure database views.

During Analytics Table creation, a companion spreadsheet is still required.

The spreadsheet supplies the worksheet names, field definitions, business descriptions, sample data, metadata, and analytical documentation used by the AI.

When a user asks a question, the AI uses the companion spreadsheet to understand the business structure and then retrieves the live business information directly from the customer's secured API views.

This approach combines the flexibility of AI with the accuracy of real time operational data.

Benefits Of Real Time Analytics

Real Time Analytics allows executives to analyze current operational information without waiting for scheduled imports or nightly data loads.

The AI always analyzes the latest information returned by the secured API views.

This makes the system suitable for operational dashboards, inventory analysis, accounting systems, payroll systems, manufacturing systems, customer management systems, sales systems, and many other business applications.

Business Domains

Analytics Tables may be assigned to one or more Business Domains.

Business Domains help organize large analytical libraries and improve AI accuracy.

Examples include Accounting, Finance, Sales, Manufacturing, Inventory, Human Resources, Purchasing, Operations, and Executive Management.

Selecting the correct Business Domain helps the AI identify the most appropriate Analytics Tables for the requested analysis.

Selecting Analytics Tables

Before asking questions, users select one or more Analytics Tables for the conversation.

Only the selected Analytics Tables are used to answer the user's requests.

This significantly improves response quality while reducing unnecessary processing.

Multiple Analytics Tables may be selected simultaneously when the requested analysis spans more than

one business dataset.

Executive Transparency

One of the primary design goals of the Chat Analytics Agent is complete transparency.

Rather than simply returning an answer, the system explains how the answer was produced.

Depending upon the request, the system may display the retrieved business data, the retrieval strategy, the analytical plan, graph points, generated graphs, and the SQL executed to retrieve the information.

This transparency allows executives and technical users to validate the analytical process and increases confidence in the results.

Graph Generation

The Chat Analytics Agent can automatically generate executive quality graphs when requested.

The graph is produced directly from the retrieved analytical data.

The graph points used to construct the graph are also available, allowing users to reproduce or further manipulate the graph using other reporting tools if desired.

Conversation Memory

Each Analytics Chat conversation maintains its own analytical context.

Users may continue asking related questions without repeating all previous information.

The AI remembers the selected Analytics Tables and previous discussion within the active conversation.

Multiple conversations may exist simultaneously, each representing a different analytical project.

Types Of Questions

The Chat Analytics Agent can answer descriptive, comparative, statistical, operational, financial, inventory, sales, forecasting, budgeting, management, and executive analytical questions.

Users may request summaries, rankings, trends, comparisons, exceptions, graphs, executive observations, and other forms of business analysis.

Typical Processing Sequence

Select or create an Analytics Chat conversation.

Select the Business Domain.

Select one or more Analytics Tables.

Enter the business question using ordinary English.

Select optional summary or graph options if desired.

Submit the request.

The AI retrieves the required information.

The AI performs the requested analysis.

The AI returns the response together with the supporting analytical information.

Major Benefits

No SQL knowledge is required.

No report programming is required.

Multiple Analytics Tables can be analyzed together.

Supports both historical and real time business data.

Produces executive quality written analysis.

Can automatically generate graphs.

Provides complete analytical transparency.

Supports detailed auditing and validation.

Can preserve complete conversations for future review.

Recommended Usage

Begin with a clearly defined business question.

Select only the Analytics Tables relevant to the requested analysis.

Select the correct Business Domain whenever possible.

Request graphs when a visual presentation will improve understanding.

Review the retrieved data, retrieval plan, and executed SQL whenever validation or technical review is required.

Save important conversations for future reference and management documentation.

Security And Data Protection

Access to Analytics Tables is controlled through system security.

Real Time API connections retrieve only the information exposed through customer approved secured database views.

The Corporate Intelligence System does not require unrestricted access to the customer's operational database.

This architecture improves both security and administrative control while allowing real time analytical processing.

20.000 - How the Chat Analytics Agent Works

Screen | 2026-07-19 00:00:00 A_ChatHow

20.000 How the Chat Analytics Agent Works

Purpose

This section explains how the Chat Analytics Agent processes business questions and how it differs from the standard AI Chat Agent.

Understanding these differences allows users to select the correct AI tool for the type of question being asked.

Two Different AI Agents

The Corporate Intelligence System contains two separate AI agents.

The standard AI Chat Agent is designed to answer questions about documents, procedures, manuals, books, policies, and other unstructured information.

The Chat Analytics Agent is designed to answer business intelligence questions using structured business data stored in Analytics Tables.

Although both systems use Artificial Intelligence, they solve very different types of business problems.

How The Standard AI Chat Agent Works

The standard AI Chat Agent searches manuals, procedures, books, screens, and other indexed documents.

When a user asks a question, the retrieval engine normally locates only the few text sections needed to answer that specific question.

Most questions are answered using information contained within two or three retrieved text chunks.

The AI then generates a response using only those retrieved documents.

This process is extremely efficient for documentation, operating procedures, policies, technical manuals, and knowledge base questions.

Examples Of Standard AI Chat Questions

How do I create a new vendor?

How do I process month end closing?

Where is the inventory reorder screen?

What does this error message mean?

Which procedure explains year end processing?

Who is the supplier for inventory item A12345?

What is the telephone number for this customer?

These questions typically require only a small amount of information to produce the correct answer.

Why Spreadsheet Analytics Is Different

Business intelligence questions are fundamentally different from document questions.

Executive and managerial questions frequently require analysis of hundreds, thousands, or even millions of business records.

The AI cannot answer these questions by retrieving only two or three text sections.

Instead, the AI must retrieve business data, perform calculations, compare records, summarize results, identify patterns, rank information, generate statistics, and often create graphs.

Examples Of Analytics Questions

List every inventory item that has reached its reorder point.

Show the supplier for each item.

Recommend the reorder quantity.

Estimate the total purchasing cost.

Identify the products with the highest inventory carrying cost.

Which customers generated the greatest gross profit this quarter?

Compare sales by region for the past three years.

Identify departments exceeding budget by more than ten percent.

Rank vendors by delivery performance.

Generate a graph showing monthly inventory trends.

These types of questions require true business intelligence processing rather than simple document retrieval.

Analytics Tables

The Chat Analytics Agent works only with Analytics Tables.

An Analytics Table contains structured business information together with metadata describing every field, business meaning, sample values, and analytical characteristics.

The metadata allows the AI to understand the business purpose of every column instead of simply

seeing rows and columns of data.

Static Analytics Tables

Static Analytics Tables are created by importing Excel spreadsheets into the Corporate Intelligence System.

Each worksheet becomes an internal SQL table.

The uploaded spreadsheet supplies both the business data and the metadata used during analysis.

Once imported, all analytical processing is performed against the internal SQL tables.

Static Analytics Tables are ideal for historical reporting, budgets, forecasts, financial statements, inventory snapshots, operational summaries, and archived business information.

Real Time API Analytics Tables

Real Time API Analytics Tables allow the Chat Analytics Agent to analyze live customer information without copying the customer's operational database into the Corporate Intelligence System.

The customer creates secured database views that expose only the information approved for analytical processing.

The Corporate Intelligence System retrieves information from these secured API views only when analytical questions are submitted.

The business data therefore always reflects the current operational state of the customer's business.

Why A Spreadsheet Is Still Required For Real Time Tables

Even though the business data is retrieved in real time, a companion spreadsheet is still required.

The spreadsheet provides the worksheet names, field definitions, business descriptions, metadata, and representative sample data used by the AI.

The spreadsheet teaches the AI the business meaning of the data.

The actual operational values are then retrieved from the secured API views during execution.

This approach combines AI knowledge with real time operational information.

Creating Real Time API Tables

The creation of Real Time API Analytics Tables involves both customer information technology personnel and business analysts.

Information technology personnel create the secured database views that expose the approved business information.

The companion spreadsheet documents those views for the AI.

The spreadsheet and API information are then loaded using the Analytics Spreadsheet Ingestion

process.

Detailed instructions for creating companion spreadsheets, secured database views, API configuration, and ingestion procedures are provided in the Spreadsheet Procedures section of the Operating Manual.

How The Chat Analytics Agent Processes A Request

The user selects a Business Domain.

The user selects one or more Analytics Tables.

The user enters a business question using ordinary English.

The AI determines which Analytics Tables are required.

The AI develops a retrieval strategy.

The AI generates SQL requests or API retrieval requests.

The required business information is retrieved.

The AI performs the requested analysis.

Optional graphs are generated when requested.

The complete response is returned together with supporting analytical information.

Executive Transparency

Unlike most AI systems, the Chat Analytics Agent is designed to explain how every answer was produced.

Depending upon the request, the user may review the retrieved data, retrieval plan, graph points, generated graph, and the SQL executed during processing.

This transparency allows executives, auditors, managers, and technical personnel to validate the analytical process.

Business Intelligence Rather Than Question Answering

The Chat Analytics Agent is not simply answering a question.

It is performing business intelligence.

The system retrieves business information, analyzes it, compares records, performs calculations, detects trends, ranks results, identifies exceptions, prepares executive observations, and optionally generates management graphs.

The result is an executive level analytical report rather than a simple answer.

Advantages Of The Chat Analytics Agent

No SQL programming is required.

No report writing is required.

No knowledge of database design is required.

Questions may be written using ordinary English.

Multiple Analytics Tables may be analyzed together.

Supports both historical and real time business information.

Produces executive quality analytical observations.

Automatically generates graphs.

Provides complete processing transparency.

Preserves analytical conversations for future review.

When To Use The Standard AI Chat Agent

Use the standard AI Chat Agent when the answer is expected to come from manuals, procedures, books, policies, screen documentation, or other indexed documents.

Use it when asking very specific factual questions that require only limited information.

When To Use The Chat Analytics Agent

Use the Chat Analytics Agent when the answer requires business analysis rather than document retrieval.

Use it for executive reporting.

Use it for operational analysis.

Use it for financial analysis.

Use it for inventory analysis.

Use it for sales analysis.

Use it for manufacturing analysis.

Use it for trend analysis.

Use it for forecasting.

Use it for budgeting.

Use it whenever management decisions require analysis of structured business information.

Summary

The standard AI Chat Agent answers questions about documents.

The Chat Analytics Agent answers questions about business data.

The standard AI Chat Agent retrieves information.

The Chat Analytics Agent performs business intelligence.

Together, these two AI systems provide a comprehensive knowledge and analytical platform capable of supporting both day to day operational questions and executive level business decision making.

30.000 - How to Formulate Prompts for Chat Analytics

Screen | 2026-07-19 00:00:00 A_ChatPrompts

30.000 How to Formulate Prompts for Chat Analytics

Purpose

This section explains how to formulate effective prompts for the Chat Analytics Agent.

The quality of the AI response depends greatly on the quality of the business question.

Unlike traditional reporting systems, you do not need to know SQL, database design, or report programming.

Instead, you should clearly describe the business problem you want solved.

The Chat Analytics Agent will determine the required data, retrieve it, perform the requested analysis, and generate an executive level response.

Think Like An Executive

The Chat Analytics Agent is not intended for simple record lookups.

It is designed to answer executive, managerial, financial, operational, and business intelligence questions.

Instead of asking for a single record, ask questions that require analysis, comparison, ranking, forecasting, trend identification, recommendations, or executive observations.

Imagine assigning the work to a senior business analyst.

The more clearly you describe the assignment, the better the analytical results will normally be.

The Most Important Rule

Always be as specific as possible.

Do not assume the AI knows which year, month, quarter, department, division, region, customer group, supplier, warehouse, product line, or manufacturing facility you want analyzed.

Clearly define the scope of the request.

Whenever possible include the reporting period, business area, products, departments, customers, suppliers, comparison period, ranking requirements, exceptions, recommendations desired, and

whether a graph should be generated.

The Chat Analytics Agent performs best when given a precise business assignment rather than a general request.

General Guidelines

Clearly describe the business objective.

Specify the reporting period.

Identify the departments, products, customers, suppliers, regions, or business units involved.

Request comparisons whenever appropriate.

Request rankings if priorities are important.

Ask the AI to identify trends, exceptions, risks, opportunities, or unusual conditions.

Request recommendations whenever management decisions are expected.

If a graph is desired, specify both the graph type and a meaningful graph title.

Weak Prompt Versus Strong Prompt

Weak Prompt

Show me sales.

Strong Prompt

Compare monthly sales for the Northeast Region during fiscal year 2025 against fiscal year 2024. Rank the ten products with the largest increase in revenue, explain the primary reasons for the increase, identify products with declining sales, and generate a line graph titled Monthly Northeast Sales Comparison 2024 versus 2025.

Weak Prompt

Show inventory.

Strong Prompt

Identify every inventory item that is currently at or below its reorder point as of December 31, 2025. Include the product number, description, current quantity, reorder quantity, preferred supplier, estimated reorder cost, rank the products from highest purchasing cost to lowest, and generate a horizontal bar chart titled Inventory Reorder Cost by Product.

Weak Prompt

Show expenses.

Strong Prompt

Analyze operating expenses for fiscal year 2025 by department. Compare actual expenses against budget, identify every department exceeding budget by more than five percent, rank them by unfavorable variance, explain the primary causes, and generate a bar chart titled Budget Variance by Department FY2025.

Manufacturing Analytics Examples

Example 1

Prompt

Identify every inventory item that has reached or fallen below its reorder point as of December 31, 2025. Include the product number, description, current quantity, reorder quantity, preferred supplier, estimated purchasing cost, rank the products from highest purchasing cost to lowest, and recommend which purchase orders should receive the highest priority.

Suggested Graph

Horizontal Bar Chart.

Suggested Graph Title

Inventory Items Requiring Reorder Ranked by Purchasing Cost.

Example 2

Prompt

Compare monthly production output for every manufacturing line during fiscal year 2025. Identify the three highest performing production lines, the three lowest performing production lines, explain significant production fluctuations, and recommend operational improvements.

Suggested Graph

Line Graph.

Suggested Graph Title

Monthly Production Output by Manufacturing Line.

Example 3

Prompt

Analyze supplier performance for calendar year 2025. Rank suppliers by average delivery days, identify suppliers whose late deliveries exceeded ten percent, estimate the operational impact, and recommend suppliers requiring immediate management attention.

Suggested Graph

Horizontal Bar Chart.

Suggested Graph Title

Supplier Delivery Performance Ranking.

Example 4

Prompt

Identify the twenty inventory items with the highest inventory carrying cost during fiscal year 2025. Explain why these products represent the greatest financial investment and recommend opportunities to reduce inventory costs.

Suggested Graph

Horizontal Bar Chart.

Suggested Graph Title

Top Twenty Inventory Items by Carrying Cost.

Financial Analytics Examples

Example 5

Prompt

Compare actual operating expenses against budget for every department during fiscal year 2025. Identify departments exceeding budget by more than ten percent, explain the largest unfavorable variances, rank departments by financial impact, and recommend management actions.

Suggested Graph

Grouped Bar Chart.

Suggested Graph Title

Budget Versus Actual Expenses by Department.

Example 6

Prompt

Analyze monthly revenue during fiscal year 2025. Compare results against fiscal year 2024, identify months with significant increases or decreases, explain the business causes, and forecast expected revenue trends for the next quarter.

Suggested Graph

Line Graph.

Suggested Graph Title

Monthly Revenue Trend Comparison.

Example 7

Prompt

Identify the twenty customers generating the highest gross profit during calendar year 2025. Compare their purchases against calendar year 2024, identify customers whose purchases declined by more than fifteen percent, and recommend follow up actions for executive management.

Suggested Graph

Horizontal Bar Chart.

Suggested Graph Title

Top Twenty Customers by Gross Profit.

Example 8

Prompt

Prepare an executive financial summary for fiscal year 2025. Compare revenue, operating expenses, gross profit, and net income against fiscal year 2024. Identify the five most significant financial changes, explain possible business causes, recommend management actions, and generate a line graph titled Financial Performance Comparison FY2024 Versus FY2025.

Suggested Graph

Line Graph.

Suggested Graph Title

Financial Performance Comparison FY2024 Versus FY2025.

Examples Of Poor Prompts

Show inventory.

Show sales.

List customers.

Show expenses.

Display suppliers.

Show production.

These requests provide very little business direction and generally produce generic responses.

Examples Of Better Prompts

Identify inventory items below reorder level for Warehouse 3 during December 2025 and estimate the total purchasing cost.

Compare quarterly sales for Product Family A during fiscal years 2024 and 2025 and identify the largest

growth opportunities.

Rank suppliers by late delivery percentage during calendar year 2025 and recommend which suppliers require corrective action.

Identify customers whose purchases declined by more than twenty percent during the past six months and explain the potential business impact.

Compare manufacturing efficiency by production line for fiscal year 2025 and identify operational bottlenecks.

Analyze operating expenses for the Finance Department during fiscal year 2025 and explain the three largest budget overruns.

Selecting The Best Graph

Use a Line Graph to display trends over time.

Use a Bar Chart to compare products, departments, suppliers, customers, regions, or business units.

Use a Horizontal Bar Chart whenever many categories must be ranked.

Use a Pie Chart to display percentage distributions when the values represent portions of a whole.

Use a Scatter Graph to identify relationships between two numerical measurements.

If you are uncertain which graph best illustrates the results, first request the analysis and then generate the graph that most effectively communicates the conclusions.

Continue The Conversation

The Chat Analytics Agent remembers the current analytical conversation.

After receiving the initial results, continue asking follow up questions.

Investigate unusual trends.

Ask why specific changes occurred.

Request additional rankings.

Compare different years.

Analyze individual departments.

Generate additional graphs.

This conversational approach often produces significantly deeper business insight than attempting to ask everything in a single request.

Summary

The objective of Chat Analytics is not simply to retrieve information.

The objective is to transform business data into executive knowledge.

Ask questions that require analysis, comparison, ranking, forecasting, explanation, recommendations, and business insight.

Always be specific.

Define the scope of the analysis.

Specify the reporting period.

Identify the business entities involved.

Request the exact output you expect.

The better the business assignment, the better the executive analysis produced by the Chat Analytics Agent.

50.000 - Analytics Chat Report

Screen | 2026-07-19 00:00:00 A_ChatPerform

50.000 Analytics Chat Report

Purpose

The Analytics Chat Report provides a complete record of an Analytics Chat conversation.

The report documents the entire analytical session, including conversation information, statistics, every message exchanged, and the detailed analytical processing performed by the system.

The report is intended for management review, auditing, troubleshooting, documentation, knowledge preservation, technical analysis, and compliance.

Overview

The report is organized into several major sections.

The report begins with conversation summary information.

It then presents overall statistics for the conversation.

Each message in the conversation is then documented individually.

Every message contains the complete analytical information generated during processing.

Conversation Information

The first section identifies the Analytics Chat session.

This section may include the Chat Name, User ID, Conversation ID, conversation status, Start Date, Last Activity Date, and other identifying information maintained by the system.

This information uniquely identifies the conversation represented by the report.

Conversation Statistics

The report includes summary statistics describing the overall Analytics Chat session.

These statistics provide a high-level view of the analytical work performed during the conversation.

The statistics may include the total number of messages, total input tokens, total output tokens, total tokens, number of graph requests, number of graphs generated, and other session level processing information.

Conversation statistics allow management and technical users to quickly understand the size and complexity of the analytical session.

Message Detail Section

Following the conversation summary, the report documents every message in chronological order.

Each message is presented as a separate section.

Every message contains both processing statistics and the analytical information generated while answering that request.

Message Information

Each message begins with identifying information.

Typical information includes the message number, Business Domain, request date and time, request type, response type, graph type, processing status, and other message attributes maintained by the system.

This information identifies the processing characteristics of the individual request.

Message Statistics

Each message includes processing statistics describing that specific request.

Statistics may include input tokens, output tokens, total tokens, processing time, graph generation information, retrieval statistics, SQL execution statistics, and other processing measurements collected during execution.

These statistics provide visibility into the resources required to process each individual request.

User Request

The complete original user request is included for every message.

This allows reviewers to understand exactly what question or analytical request was submitted.

AI Response

The complete AI response generated for the request is included.

The response documents the analytical conclusions, explanations, recommendations, and other information returned to the user.

Graph Points

When graph generation is requested, the report includes the graph point data used to construct the graph.

This information documents the numerical values supplied to the graph generation process.

Graph

When a graph is generated, the report includes the graph image.

The graph provides a visual representation of the analytical results.

Retrieved Data

The Retrieved Data section contains the information retrieved from the Corporate Intelligence System to satisfy the user's request.

This section documents the business data provided to the AI during the analytical process.

Retrieval Plan

The Retrieval Plan documents the reasoning process used to determine what information needed to be collected.

This section provides transparency into the analytical retrieval strategy selected by the system.

Executed SQL

The report includes the SQL statements executed to retrieve information from the database.

Displaying the executed SQL provides complete transparency into the database retrieval process.

This information is valuable for technical review, troubleshooting, validation, auditing, and performance analysis.

Report Benefits

The Analytics Chat Report creates a permanent record of every analytical conversation.

Managers can review completed analyses.

Technical personnel can troubleshoot retrieval and SQL generation.

Developers can validate analytical processing.

Auditors can verify how conclusions were produced.

Users can preserve important analytical work for future reference.

Recommended Uses

Use the report to document important business analyses.

Use the report during management reviews.

Use the report to validate AI generated responses.

Use the report when troubleshooting unexpected analytical results.

Use the report to review graph generation and supporting data.

Use the report to verify the retrieval plan and executed SQL.

Use the report as permanent documentation of significant analytical sessions.

Contents Summary

The Analytics Chat Report may contain the following information:

Conversation identification information.

Conversation statistics.

One section for every message.

Message identification information.

Message processing statistics.

Original user request.

Complete AI response.

Graph points.

Generated graph image, when applicable.

Retrieved business data.

Retrieval plan.

Executed SQL.

Additional analytical processing information generated during execution.

RulesAndValidations

The report represents the conversation exactly as it was processed.

Messages appear in chronological order.

Each message is documented independently.

Graphs appear only for messages that requested graph generation.

SQL is displayed only when database retrieval was performed.

The report may be several pages long depending on the number of messages and the amount of analytical information generated.

SecurityAndAccess

The report may contain confidential business information.

The report may include financial information, customer information, employee information, operational data, analytical conclusions, retrieved records, and executed SQL.

Reports should be distributed only to authorized personnel.

Reports should be stored according to company security and document retention policies.

100.000 - How to Use the Chat Analytics Agent

Screen | 2026-07-19 00:00:00 A_Chat

100.000 How to Use the Chat Analytics Agent Purpose

Use the Chat Analytics Agent to ask analytical questions about structured business data.

The Chat Analytics Agent can analyze data loaded from spreadsheets and data retrieved in real time from approved customer API views.

The agent can perform calculations, comparisons, rankings, filtering, grouping, trend analysis, exception analysis, recommendations, predictions, and graph generation.

The Chat Analytics Agent is different from the standard AI Chat Agent.

The standard AI Chat Agent searches documents, text chunks, procedures, screens, and other written business knowledge.

The Chat Analytics Agent works with selected structured analytics tables and uses SQL based processing to answer questions from rows, columns, measures, dates, categories, and other structured fields.

The Chat Analytics Agent provides the response, graph information, retrieved data, retrieval plan, and executed SQL so executives and analysts can review how the answer was produced.

Starting Or Continuing A Chat

Press New Chat to begin a new Chat Analytics conversation.

A new chat creates a separate conversation where you can select analytics tables and ask one or more related questions.

To continue a prior conversation, select the chat name from the Chat History box at the lower left side

of the screen.

The selected chat becomes the active chat and its saved messages, table selections, business domain, and prior responses are displayed.

The Active Chat area at the top of the screen shows the active chat number and chat name.

Use Rename Chat when the current chat name should be changed to a more descriptive name.

A descriptive chat name makes it easier to locate the conversation later in Chat History.

Important Areas On The Left Side

The left side of the screen contains the Business Domain selection, Selected Tables for Displayed Chat, Selected Tables for Next Chat, and Chat History.

These areas determine the business context and analytics data that will be used when a new question is sent.

Business Domain

Select the appropriate Business Domain before sending an analytics request.

The Business Domain identifies the business area related to the question, such as Manufacturing, Finance, Sales, Inventory, Payroll, Operations, Compliance, or another configured domain.

The selected Business Domain gives the Chat Analytics Agent additional context for interpreting the request and selecting appropriate analytical methods.

The Optional Business Domain for Search field is also used when searching for analytics tables.

The Selected Business Domain field shows the domain currently committed to the chat.

Review the selected domain before sending a question because an incorrect domain may reduce the relevance of the response.

Selected Tables For Displayed Chat

Selected Tables for Displayed Chat shows the analytics tables that were used by the message currently displayed in the conversation.

This area helps you understand which data sources supported the displayed answer.

The displayed table names are underlined links.

Click an underlined local spreadsheet table name to download its related source file when the source file is available.

External API tables may not have a complete downloadable production file because their live data remains in the customer system.

A question mark or information control next to a table name opens the Analytics Table Information modal.

The information modal provides additional details about the analytics table, fields, sample data, and related document information.

Selected Tables For Next Chat

Selected Tables for Next Chat shows the analytics tables that will be used the next time a question is sent.

This is the most important table selection area when preparing a new analytics request.

The tables shown under Selected Tables for Displayed Chat do not automatically control the next request.

Before sending a new question, confirm that Selected Tables for Next Chat contains the tables required for that question.

If the required tables are not listed, press Select Tables and choose the correct analytics tables.

The table names in Selected Tables for Next Chat are also underlined links when a related source file can be downloaded.

Use the information control next to a selected table to review its field definitions, sample data, and other descriptive information.

Selecting Analytics Tables

Press Select Tables to open the Select Analytics Tables for This Chat screen.

The selection screen allows you to search, review, stage, and commit one or more analytics tables for the conversation.

You may search by Business Domain, Any Text, From Date, and Through Date.

Any Text can search table names, descriptions, spreadsheet names, worksheet names, subjects, identifiers, and other available analytics metadata.

From Date and Through Date search the analytics document creation date.

Press Search to display analytics tables that match the search criteria.

Press Reset Search to clear the search criteria and begin a new search.

The upper section of the table selection screen is Currently Staged.

The lower section is Search Results.

Currently Staged Tables

Currently Staged shows the analytics tables that are presently selected for the next chat request.

Each staged table appears as an information card.

To remove a table from the staged selection, clear the Select this table check box on its card.

Press Clear Selection to remove all currently staged tables.

Clearing or changing staged selections does not affect the active chat until Commit Selected is pressed.

Search Result Cards

Search Results displays cards for analytics tables that match the search criteria.

To add a table, select the Select this table check box on its card.

Each card shows the display name, worksheet name, business domain, row count, column count, source type, status, and other available information.

Press View More Information to review detailed information about a table before selecting it.

Review the table name, worksheet, description, row count, column count, source type, and business domain before committing the selection.

Local And API Analytics Tables

Each analytics table card identifies whether the source is a local standard table or an external API table.

A local standard table contains data loaded from a spreadsheet into an internal SQL analytics table.

Local tables normally represent a static snapshot of the spreadsheet data at the time it was loaded.

An API table provides real time or current access to an approved customer database view through a secured API.

API tables may contain accounting, payroll, inventory, manufacturing, sales, customer, supplier, financial, or operational data maintained in the customer system.

An API label on the table card identifies an external API analytics source.

A READY status indicates that the table definition is available for Chat Analytics use.

Before selecting an API table, confirm that the table represents the correct customer view and business purpose.

Committing Selected Tables

After selecting and deselecting the required cards, press Commit Selected.

Commit Selected saves the staged table selection for the next analytics request and returns to the main Chat Analytics screen.

Confirm that the expected table names now appear under Selected Tables for Next Chat.

Do not send the question until the correct tables and Business Domain are selected.

Preparing The Analytics Request

Enter the business question in the command or request box near the bottom of the main screen.

Write the request clearly and identify the period, measure, grouping, comparison, ranking, exception, or business result required.

For example, ask which departments had the greatest favorable and unfavorable budget variances during fiscal year 2024 and request that the departments be ranked.

Include important filters such as year, month, customer, product, region, department, account, employee, supplier, or status when applicable.

Ask one complete analytical question at a time when possible.

Complex executive questions are supported, but the request should clearly state the expected business result.

Request Options

Select Summary when you want the response to include a concise summary of the main findings.

Select Use Domain when you want the selected Business Domain to be applied as explicit context for the request.

Select Show Tables when you want the response process to display or emphasize the tables used for the request.

Select Graph On when a graph should be created with the response.

When Graph On is selected, choose the required Graph Type.

Available graph types depend on the system configuration and may include line, bar, pie, scatter, area, or other supported graph formats.

Enter a clear Graph Title when a graph is requested.

The graph title should describe the measure, comparison, period, and grouping shown in the graph.

Review the question, domain, selected tables, and graph options before pressing Send.

Sending The Request

Press Send to submit the analytics request.

The Chat Analytics Agent reviews the question, selected tables, business domain, field definitions, sample data, and other table metadata.

The system creates a retrieval plan, generates SQL, executes the required queries, evaluates the returned rows, prepares the response, and creates the graph when requested.

Chat Analytics processing is more complex than an ordinary text chat request.

An average response may take approximately 20 seconds, depending on the number of tables, complexity of the question, amount of data, API response time, SQL processing, and graph generation.

A response time of approximately 20 seconds is reasonable for executive level analysis that includes

data retrieval, calculations, interpretation, transparency information, and graph generation.

Do not press Send repeatedly while the request is processing.

Returned Message Structure

Each completed response begins with a message heading that shows the message number, selected Business Domain, date, and time.

The message is then displayed in a sequence of information boxes.

The standard sequence is User Request, Response, Graph Points and Graph when requested, Retrieved Data, Retrieval Plan, and Executed SQL.

These sections provide transparency into the question, answer, data, analysis plan, graph source points, and SQL execution.

User Request

The User Request box displays the original question exactly as it was submitted.

Review this box to confirm that the system processed the intended question.

If the request was incomplete or unclear, submit a revised question as a new message.

Use the Copy button to copy the displayed request to the clipboard.

Response

The Response box contains the final business answer produced by the Chat Analytics Agent.

The response may include totals, rankings, comparisons, trends, exceptions, findings, recommendations, limitations, and management observations.

The response is based on the selected tables, retrieved rows, generated SQL, and analytical plan.

Review the response together with the Retrieved Data, Retrieval Plan, and Executed SQL when the result will be used for an important decision.

Use the Copy button to copy the response into an email, document, report, presentation, or another application.

Graph Points

The Graph Points box appears when graph data is generated.

Graph Points contains the structured values used to create the graph.

The displayed fields may include xValue, yValue, seriesName, labelValue, xSortValue, sizeValue, sliceLabel, and other graph related values.

Use the Graph Points box to verify the numerical values and categories used in the graph.

Use the Copy button to copy the graph points when you want to create, modify, or manipulate your own graph in another application.

Copied graph points can be pasted into a spreadsheet, reporting tool, presentation application, or another analytical system.

Graph

The Graph box displays the graph generated for the analytics response.

The graph may show trends, comparisons, rankings, categories, departments, periods, or other analytical relationships.

Review the graph title, axes, legend, series, labels, and values to confirm that the graph represents the intended question.

Interactive graph controls may be available for zooming, panning, resetting, or viewing graph options.

Use the Copy button to copy the graph image.

The copied graph can be inserted into a report, email, presentation, executive briefing, or other document.

Retrieved Data

The Retrieved Data box shows the result rows returned by the executed analytics queries.

The box identifies the result table, SQL request sequence, purpose, execution status, row count, column names, and returned values.

Review Retrieved Data to confirm that the response is supported by the expected rows and measures.

The data may be horizontally or vertically scrollable when the result contains many columns or rows.

Use the Copy button to copy the retrieved data for further review or use in another application.

Retrieval Plan

The Retrieval Plan box explains how the Chat Analytics Agent interpreted and planned the request.

The plan may describe the analytical objective, selected data strategy, required dimensions, measures, joins, filters, calculation strategy, comparison strategy, limitations, graph strategy, and final response strategy.

The Retrieval Plan helps executives and analysts understand the reasoning structure used before SQL was executed.

Review the plan when you want to confirm that the system interpreted the request correctly.

Use the Copy button to copy the retrieval plan for audit, review, support, or documentation purposes.

Executed SQL

The Executed SQL box displays the actual SQL requests generated and executed for the analytics response.

The box may show multiple SQL requests when separate queries are required for the answer, graph, comparison, or supporting calculations.

Each request may identify the purpose, execution status, rows returned, and complete SQL statement.

The Executed SQL provides technical transparency and allows qualified users to review the exact calculations, filters, grouping, ordering, and limits used by the system.

Use the Copy button to copy the SQL for technical review, troubleshooting, validation, or documentation.

Do not modify or execute copied SQL against a production system unless you are authorized and understand the query.

Transparency And Confidence

The User Request, Response, Graph Points, Graph, Retrieved Data, Retrieval Plan, and Executed SQL are displayed to provide full analytical transparency.

This structure allows an executive or analyst to see not only the final answer but also the source values, processing plan, generated SQL, and graph data used to produce it.

Reviewing these sections can increase confidence in the response and make it easier to identify incorrect assumptions, missing data, inappropriate filters, or unexpected calculations.

For important decisions, compare the response against the retrieved data and executed SQL before relying on the result.

Message Number Navigation

The far right side of the screen displays the message numbers created in the active chat.

Each numbered button represents one message in the conversation.

Hover over a message number to display the related question when hover information is available.

Click a message number to move directly to that message in the conversation display.

The active message number is highlighted.

Message navigation is useful in long conversations where many analytical questions and responses have been generated.

Command Navigation

The Select Command control at the bottom of the screen provides navigation and utility commands.

Available commands may include Go To Line, Top, Bottom, Current, Show Cost, and other configured

actions.

Select Top to move to the beginning of the conversation.

Select Bottom to move to the most recent area of the conversation.

Select Current to return to the currently selected message or current conversation position.

Select Go To Line, enter the required line or message number, and press Execute to move to that location.

Select Show Cost and press Execute to display the cost information associated with the chat messages.

Cost Information

The cost display shows the processing cost associated with the generated analytics messages.

Cost information may be displayed by message number so the user can review the relative cost of each request.

Complex requests involving multiple SQL queries, large retrieved datasets, external API calls, long responses, or graph generation may cost more than simple requests.

Use the cost information to understand usage patterns and manage analytical processing responsibly.

Analytics Table Information Modal

Click the information control next to a selected table to open the Analytics Table Information modal.

The modal displays the selected analytics table name, physical or external table identity, Analytics Document ID, status, and available information sections.

The Document section displays descriptive information associated with the analytics document record.

The Table section displays information about the physical internal table or external API table definition.

The Fields section displays field names, SQL data types, nullable status, keys, and field descriptions.

The Sample Data section displays representative sample rows when sample data is available.

Review the field names and descriptions before asking a question when you are uncertain which measures, categories, dates, or identifiers are available.

Press Close to close the information modal and return to the chat screen.

Downloading Source Files

Underlined local table names in Selected Tables for Displayed Chat and Selected Tables for Next Chat can be clicked to download the related spreadsheet source file when the file is available.

Downloading the source file allows an authorized user to review the original spreadsheet data that created the analytics table.

External API tables may use a sample workbook for field definitions and sample data while the live production rows remain in the customer database.

For an API table, a downloaded file may contain sample or definition data rather than the complete current production dataset.

WhereToFind

Main Menu to Chat With Me to Chat Analytics Agent.

Images

The screenshot displays the Chat Analytics Agent interface. At the top, there's a navigation bar with links like Home, Screen Help, and a search bar. Below this is a main menu with options like File, Chat With Me, Books Chapters, Screens Documents, Procedure Documents, Book Viewing, Ingest Documents, AI Control, Search Control, and Utilities. The main chat area shows an active chat session titled 'Active Chat: 2 Demo 2' with a balance of '\$2.796663'. On the left, there are controls for 'New Chat', 'Rename Chat', 'Select Tables', and 'Optional Business Domain for Search'. The chat history on the left shows 'Demo 2' and 'Demo 1'. The main chat area displays 'Message 11 | Business Domain: MANUFACTURING | 07/18/2026 4:45 PM'. The message content is a 'User Request' asking for departmental variance analysis. The response provides a detailed analysis of FY2024 data, including a table of 'Graph Points' and a graph titled 'Contribution to Annual Budget Variance by Department'. The interface also includes a 'Send' button and various controls for chat interaction.

Message 11 | Business Domain: MANUFACTURING | 07/18/2026 4:45 PM

User Request

Which departments contributed the greatest total favorable and unfavorable variances during the fiscal year 2024? Rank departments by cumulative VarianceUSD and explain the primary financial observations that management should investigate.

Response

For FY2024, the departments ranked by cumulative VarianceUSD are: 1) Sales at \$26,963.10, 2) Marketing at \$18,998.85, 3) Operations at \$603.44, 4) Finance at -\$4,443.25, 5) HR at -\$5,940.80, and 6) IT at -\$15,779.35. Using the returned totals, Sales contributed the greatest favorable annual variance, with \$26,963.10 favorable and no unfavorable offset. IT contributed the greatest unfavorable annual variance, with -\$15,779.35 and no favorable offset. Management should also investigate Finance, because it had a large favorable component of \$20,767.37 but an even larger unfavorable component of -\$25,210.62, producing a net negative annual variance of -\$4,443.25. Marketing finished strongly favorable overall, but

Graph Points

xValue	yValue	seriesName	labelValue	xSortValue	sizeValue	sliceLabel	slic
1	-3601.28	Finance	1	0	0	0	0
1	-2329.68	HR	1	0	0	0	0
1	-3288.61	IT	1	0	0	0	0
1	-5750.66	Marketing	1	0	0	0	0

Graph

Contribution to Annual Budget Variance by Department

Type a command or request... **Send**

☐ Summary ☐ Use Domain ☐ Show Tables ☐ Graph On Graph Type: NONE

Graph Title:

Select Command Enter Line # **Execute**

Figure: Main Chat Analytics Agent screen showing the active chat, business domain, selected tables, chat history, message display, navigation, and request controls.

 Corporate Intelligence System

[Home](#) [Screen Help ?](#)

[Chat with Me](#)

Screen Name

Description

[File](#) [Chat With Me](#) [Books Chapters](#) [Screens Documents](#) [Procedure Documents](#) [Book Viewing](#) [Ingest Documents](#) [AI Control](#) [Search Control](#) [Utilities](#)

Select Analytics Tables for This Chat
Search, review, and stage one or more analytics tables before committing them to this conversation.

Business Domain

MANUFACTURING

Any Text

From Date

mm/dd/yyyy

Through Date

mm/dd/yyyy

Searches the analytics document creation date.

Reset Search

Search

Clear Selection

Commit Selected (1)

Currently Staged

1 table

☒ Select this table

API

READY

Manufacturing Real Time

AI_Manufacturing_Customer_Summary

Real Time API views of Manufacturing Database

MANUFACTURING

Spreadsheet: Manufacturing

Worksheet: AI_Manufacturing_Customer_Summary

10 rows 17 columns

View More Information

Search Results

4 tables

☐ Select this table

READY

Manufacturing Real Time

AI_Manufacturing_Inventory_Status

Real Time API views of Manufacturing Database

MANUFACTURING

Spreadsheet: Manufacturing

Worksheet: AI_Manufacturing_Inventory_Status

80 rows 23 columns

View More Information

☐ Select this table

READY

Manufacturing Real Time

AI_Manufacturing_Product_Performance

Real Time API views of Manufacturing Database

MANUFACTURING

Spreadsheet: Manufacturing

Worksheet: AI_Manufacturing_Product_Performance

72 rows 16 columns

View More Information

☐ Select this table

READY

Manufacturing Real Time

AI_Manufacturing_Production_Efficiency

Real Time API views of Manufacturing Database

MANUFACTURING

Spreadsheet: Manufacturing

Worksheet: AI_Manufacturing_Production_Efficiency

60 rows 27 columns

View More Information

☐ Select this table

READY

Manufacturing Real Time

AI_Manufacturing_Sales_Summary

Real Time API views of Manufacturing Database

MANUFACTURING

Spreadsheet: Manufacturing

Worksheet: AI_Manufacturing_Sales_Summary

72 rows 36 columns

View More Information

Figure: Select Analytics Tables screen showing Currently Staged tables, Search Results, local and API table cards, and Commit Selected.

 Corporate Intelligence System

[Home](#) [Screen Help ?](#)

[Chat with Me](#)

Screen Name

A_Chat

Description

A_Chat

[File](#) [Chat With Me](#) [Books Chapters](#) [Screens Documents](#) [Procedure Documents](#) [Book Viewing](#) [Ingest Documents](#) [AI Control](#) [Search Control](#) [Utilities](#)

Active Chat: 2 Demo 2

\$2.796663

New Chat

Rename Chat

Select Tables

Optional Business Domain for Search:
Manufacturing

Selected Business Domain:

Selected Tables for Displayed Chat
[Sample Finance Budget Forecast Bud](#)

Selected Tables for Next Chat
[AI Manufacturing Customer Summary](#)

Chat History
Demo 2
Demo 1

GROUP BY region ORDER BY graph_y_value DESC LIMIT 10000

Message 11 | Business Domain: MANUFACTURING | 07/18/2026 4:45 PM

User Request

Copy

Which departments contributed the greatest total favorable and unfavorable variances during the fiscal year 2024? Rank departments by cumulative VarianceUSD and explain the primary financial observations that management should investigate.

Response

Copy

For FY2024, the departments ranked by cumulative VarianceUSD are: 1) Sales at \$26,963.10, 2) Marketing at \$18,998.85, 3) Operations at \$603.44, 4) Finance at -\$4,443.25, 5) HR at -\$5,940.80, and 6) IT at -\$15,779.35. Using the returned totals, Sales contributed the greatest favorable annual variance, with \$26,963.10 favorable and no unfavorable offset. IT contributed the greatest unfavorable annual variance, with -\$15,779.35 and no favorable offset. Management should also investigate Finance, because it had a large favorable component of \$20,767.37 but an even larger unfavorable component of -\$25,210.62, producing a net negative annual variance of -\$4,443.25. Marketing finished strongly favorable overall, but

Graph Points

Copy

xValue	yValue	seriesName	labelValue	xSortValue	sizeValue	sliceLabel	slic
1	-3601.28	Finance	1	0	0	0	
1	-2329.68	HR	1	0	0	0	
1	-3288.61	IT	1	0	0	0	
1	-5750.66	Marketing	1	0	0	0	

Graph

Copy

Type a command or request...

Send

☐ Summary ☐ Use Domain ☐ Show Tables ☐ Graph On Graph Type: NONE

Graph Title:

Select Command

Enter Line #

Execute

1

2

3

4

5

6

7

8

9

10

11

Figure: Completed analytics message showing the original User Request, final Response, Graph Points, and Graph section.

298

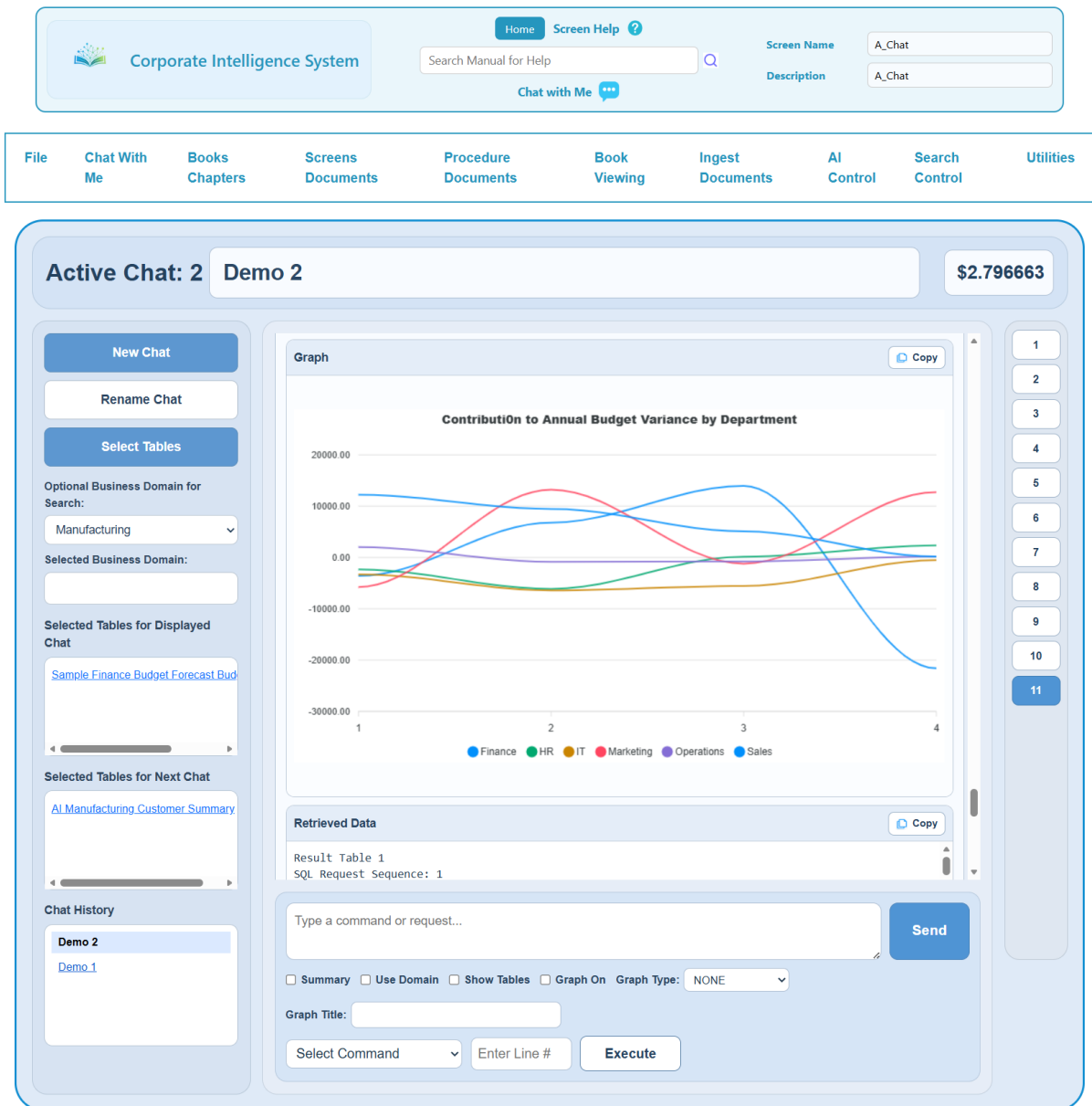


Figure: Generated graph showing the analytical result with series, values, legend, axes, and graph controls.

Corporate Intelligence System

Home Screen Help ?

Search Manual for Help

Screen Name A_Chat

Description A_Chat

Chat with Me

File Chat With Me Books Chapters Screens Documents Procedure Documents Book Viewing Ingest Documents AI Control Search Control Utilities

Active Chat: 2 Demo 2

\$2.796663

New Chat

Rename Chat

Select Tables

Optional Business Domain for Search:

Manufacturing

Selected Business Domain:

Selected Tables for Displayed Chat

Sample Finance Budget Forecast Bud

Selected Tables for Next Chat

AI Manufacturing Customer Summary

Chat History

Demo 2

Demo 1

Retrieved Data

Result Table 1

SQL Request Sequence: 1

Purpose: Retrieve FY2024 cumulative variance by department, including separate favorable and unfavor

Execution Status: OK

Row Count: 6

department_name	total_variance_usd	favorable_variance_usd	unfavorable_variance_usd	tota
Sales	26963.1	26963.1000	0.0000	329341.4900
Marketing	10000.00	10000.0000	0.0000	337624.7200
Production	10000.00	10000.0000	0.0000	356304.5900
Research & Development	10000.00	10000.0000	0.0000	356304.5900
Administrative	10000.00	10000.0000	0.0000	356304.5900
Other	10000.00	10000.0000	0.0000	356304.5900

Retrieval Plan

Analytical Objective: Identify which departments had the largest cumulative favorable and unfavorable budget variances in fiscal year 2024, rank departments by summed varianceUSD, and provide the result structure needed for management commentary on where significant positive and negative variance concentrations occurred. Selected Data Strategy: Use the single selected STD table C000001_Sample_Finance_Budget_Forecast_Budget_Forecast because it directly contains fiscalYear, dept, quarter, budgetUSD, forecastUSD, actualUSD, varianceUSD, and notes. No join is needed because all required dimensions, time buckets, and variance measures are already present in one table. Retrieval Strategy: Use one SQL request to aggregate FY2024 variance by department for ranking and favorable/unfavorable contribution analysis. Use a second SQL request to aggregate FY2024 variance by quarter and department so FINAL can support management observations with timing patterns and also populate the requested graph. Calculation Strategy: Sum varianceUSD by dept to produce cumulative annual variance. Also derive separate favorable and unfavorable totals with conditional sums on positive and negative varianceUSD so FINAL can distinguish departments driving gains versus overruns. Rank departments by cumulative summed varianceUSD in descending order, while preserving both positive and negative contribution columns. For the graph-supporting request, sum varianceUSD by quarter and dept for FY2024. Comparison Strategy: Compare departments against each other on annual total varianceUSD, favorable variance contribution, and unfavorable variance contribution. Use the quarterly department result to compare whether a department's annual position is driven by one quarter or repeated across multiple quarters. FINAL should highlight top favorable departments, top unfavorable departments, and any departments with offsetting quarter-to-quarter swings. Limitation Strategy: The schema provides only one fact-style table with FY, department, quarter, budget, forecast, actual, variance, and blank notes. There is no explicit variance sign definition beyond numeric values, so the plan assumes positive varianceUSD is favorable and negative varianceUSD is unfavorable unless business rules in FINAL state otherwise. There are no monthly dates, account categories, cost centers, or detailed

Type a command or request...

Send

☐ Summary ☐ Use Domain ☐ Show Tables ☐ Graph On Graph Type: NONE

Graph Title:

Select Command

Enter Line #

Execute

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Figure: Retrieved Data and Retrieval Plan showing the returned result rows and the analytical strategy used by the agent.

Corporate Intelligence System

Home Screen Help ?

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Description A_Chat

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Active Chat: 2 Demo 2

\$2.796663

New Chat

Rename Chat

Select Tables

Optional Business Domain for Search:

Manufacturing

Selected Business Domain:

Selected Tables for Displayed Chat

Sample Finance Budget Forecast Bud

Selected Tables for Next Chat

AI Manufacturing Customer Summary

Chat History

Demo 2

Demo 1

contribution. Use the quarterly department result to compare whether a department's annual position is driven by one quarter or repeated across multiple quarters. FINAL should highlight top favorable departments, top unfavorable departments, and any departments with offsetting quarter-to-quarter swings. Limitation Strategy: The schema provides only one fact-style table with FY, department, quarter, budget, forecast, actual, variance, and blank notes. There is no explicit variance sign definition beyond numeric values, so the plan assumes positive varianceUSD is favorable and negative varianceUSD is unfavorable unless business rules in FINAL state otherwise. There are no monthly dates, account categories, cost centers, or detailed note text available, so management observations must remain at department and quarter summary level. Final Response Strategy: FINAL should use sqlRequestSet item 1 as the primary ranked department table. It should identify departments with the largest positive and negative cumulative varianceUSD, reference the separate favorable and unfavorable totals, and summarize where investigation is warranted. FINAL should use sqlRequestSet item 2 to explain whether major annual variances are concentrated in specific quarters or persistent across the year. FINAL should avoid unsupported root-cause claims beyond the available data. Graph Strategy: Although the analytical request is primarily a ranked comparison where a bar chart would normally fit better, a usable LINE graph plan is accepted because graphRequestedSw is Y and quarter provides an ordered x-axis. The graph should use FY2024 quarterly summed varianceUSD on the x-axis by quarter with department as the series to show how each department contributed to annual variance over time.

Executed SQL

Copy

SQL Request 1 / Result Table 1 Purpose: Retrieve FY2024 cumulative variance by department, including separate favorable and unfavorable contribution totals, for ranking and management commentary. Execution Status: OK Rows Returned: 6
Executed SQL: SELECT dept as department_name, SUM(varianceUSD) as total_variance_usd, SUM(CASE WHEN varianceUSD > 0 THEN varianceUSD ELSE 0 END) as favorable_variance_usd, SUM(CASE WHEN varianceUSD < 0 THEN varianceUSD ELSE 0 END) as unfavorable_variance_usd, SUM(budgetUSD) as total_budget_usd, SUM(forecastUSD) as total_forecast_usd, SUM(actualUSD) as total_actual_usd FROM C000001_Sample_Finance_Budget_Forecast_Budget_Forecast WHERE fiscalYear = 2024 GROUP BY dept ORDER BY total_variance_usd DESC, department_name ASC LIMIT 20
SQL Request 2 / Result Table 2 Purpose: Retrieve FY2024 quarterly variance by department for period-pattern analysis and line graph support. Execution Status: OK Rows Returned: 24
Executed SQL: SELECT quarter as graph_x_value, SUM(varianceUSD) as graph_y_value, dept as graph_series_value FROM C000001_Sample_Finance_Budget_Forecast_Budget_Forecast WHERE fiscalYear = 2024 GROUP BY quarter, dept ORDER BY graph_x_value ASC, graph_series_value ASC

Type a command or request...

Send

☐ Summary ☐ Use Domain ☐ Show Tables ☐ Graph On Graph Type: NONE

Graph Title:

Select Command

Enter Line #

Execute

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Figure: Executed SQL section showing the actual SQL requests, purposes, execution status, and returned row counts.

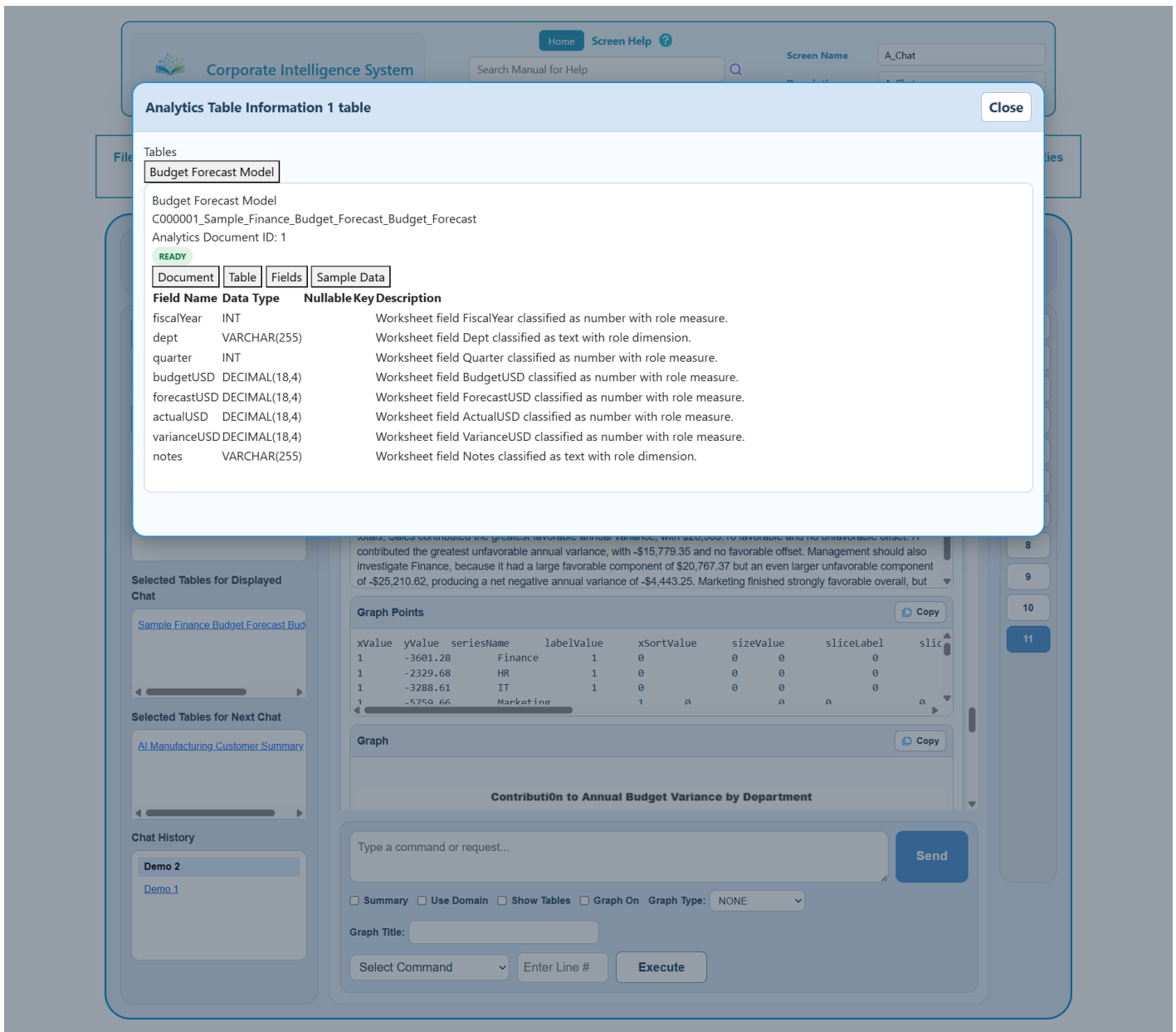


Figure: Analytics Table Information modal showing table identity, field definitions, sample data access, and descriptive information.

ButtonsAndActions

New Chat creates a new Chat Analytics conversation.

Rename Chat changes the name of the active conversation.

Select Tables opens the analytics table search, staging, and selection screen.

Search finds analytics tables matching the entered search criteria.

Reset Search clears the analytics table search criteria.

Clear Selection removes all currently staged analytics tables.

Commit Selected saves the staged table selection for the next chat request.

Select this table adds or removes an analytics table from the staged selection.

View More Information opens additional descriptive information about an analytics table.

Send submits the question and selected options to the Chat Analytics Agent.

Summary requests a concise summary of the analytical findings.

Use Domain applies the selected Business Domain as explicit request context.

Show Tables requests table related information in the analytics process.

Graph On requests graph generation.

Graph Type selects the required graph format.

Graph Title provides the title displayed on the generated graph.

Copy copies the contents of the related box or graph to the clipboard.

Message number buttons move directly to the selected message.

Select Command chooses a navigation, cost, or utility command.

Enter Line Number identifies the requested message or line for a Go To Line command.

Execute performs the selected command.

Close closes the Analytics Table Information modal.

FieldsOrSettings

Active Chat displays the active conversation number and name.

Optional Business Domain for Search filters analytics table searches by business area.

Selected Business Domain shows the business domain committed to the current chat.

Selected Tables for Displayed Chat shows the data sources used by the displayed message.

Selected Tables for Next Chat shows the data sources that will be used by the next request.

Chat History lists saved Chat Analytics conversations.

Business Domain on the table selection screen filters available analytics tables.

Any Text searches names, descriptions, spreadsheets, worksheets, subjects, identifiers, and related metadata.

From Date and Through Date filter analytics tables by creation date.

The request box contains the business question sent to the Chat Analytics Agent.

Graph Type identifies the required graph format.

Graph Title identifies the title used on the generated graph.

RulesAndValidations

Select or create a chat before sending an analytics request.

Select the appropriate Business Domain when the question depends on a specific business context.

At least one appropriate analytics table should be selected for the next chat request.

Confirm that Selected Tables for Next Chat contains the required tables before pressing Send.

Use local tables for data loaded from static spreadsheets.

Use API tables when current approved customer data must be retrieved through secured external views.

Do not assume that a table used by the displayed message will automatically be used by the next request.

Press Commit Selected after changing the staged table selection.

Enter a clear business question with the required period, measure, grouping, filter, comparison, or ranking.

Select Graph On only when a graph is required.

Select a Graph Type and enter a Graph Title when Graph On is selected.

Do not press Send repeatedly while a request is processing.

Review the Response, Retrieved Data, Retrieval Plan, and Executed SQL before using an important result.

Do not assume that an API table source file contains the complete current customer data.

Do not execute copied SQL against a production database unless authorized.

DownstreamEffects

The selected Business Domain and Selected Tables for Next Chat become inputs to the next Chat Analytics request.

The Chat Analytics Agent uses table definitions, field descriptions, sample data, business metadata, and the user request to create an analytical retrieval plan.

The retrieval plan is used to generate one or more SQL requests.

Local analytics SQL is executed against internal physical analytics tables.

External API analytics may retrieve current customer data through approved secured API views before analysis is completed.

The returned data is interpreted and converted into the final response, graph points, and graph when requested.

The complete message remains stored in the active chat and can be selected later from Chat History or message navigation.

Examples

Example 1: Select a budget forecast table and ask which departments produced the greatest favorable and unfavorable annual variances.

Example 2: Select an inventory table and ask which products have the highest inventory value, lowest sales activity, and greatest markdown risk.

Example 3: Select a payroll API table and ask for current overtime totals by department and employee classification.

Example 4: Select a sales table, turn Graph On, choose a line graph, and ask for monthly sales trends by region.

Example 5: Select accounting and accounts receivable API views and ask which customers have the largest overdue balances and the greatest payment risk.

Example 6: Select manufacturing production, inventory, and customer order tables and ask which products may create near term production shortages.

Example 7: Copy the Graph Points into a spreadsheet to create a customized management graph.

Example 8: Copy the generated graph into an executive presentation or operating report.

Troubleshooting

If the response does not use the expected data, confirm the tables listed under Selected Tables for Next Chat.

If the selected tables are incorrect, press Select Tables, change the staged cards, and press Commit Selected.

If no tables appear in Search Results, remove unnecessary filters, reset the search, or search using broader text.

If an expected table does not appear, verify the Business Domain, creation dates, table status, and search text.

If the wrong Business Domain is shown, select the correct domain before sending another request.

If the response is too general, revise the question to include the required period, measure, grouping, filters, and requested result.

If a graph is not produced, verify that Graph On is selected, a supported Graph Type is chosen, and a Graph Title is entered.

If the graph does not represent the intended comparison, review the Graph Points and submit a clearer

graph request.

If the response appears incorrect, review Retrieved Data, Retrieval Plan, and Executed SQL for incorrect filters, assumptions, or table selections.

If an API request fails, verify that the API table is READY and report the issue to authorized technical support.

If the request takes longer than expected, allow the current process to complete and do not press Send repeatedly.

If the source file does not download, the table may be an API source or the related file may not be available.

If the information modal does not open, stop and report the problem for technical review.

If a Copy button does not copy the expected content, select the text manually or report the problem for technical review.

If message navigation does not move to the expected message, use Select Command with Go To Line, Top, Bottom, or Current.

SecurityAndAccess

Access to the Chat Analytics Agent is controlled by the configured screen and analytics security permissions.

Users may only select and analyze tables that their security rights allow them to access.

External API tables may contain confidential accounting, payroll, employee, customer, financial, inventory, or operational data.

Do not select, copy, download, or distribute data unless you are authorized to use it.

Copied responses, retrieved data, graph points, graphs, retrieval plans, and SQL may contain confidential business information.

Store and distribute copied analytics information according to company security and privacy requirements.

Downloaded source spreadsheets must be protected according to their data classification.

Do not share external API credentials, tokens, passwords, secrets, or unrestricted database information through the chat request.

Images

 Corporate Intelligence System

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[Chat with Me](#)

Screen NameA_Chat

DescriptionA_Chat

[File](#) [Chat With Me](#) [Books Chapters](#) [Screens Documents](#) [Procedure Documents](#) [Book Viewing](#) [Ingest Documents](#) [AI Control](#) [Search Control](#) [Utilities](#)

Active Chat: 2 Demo 2

\$2.796663

New Chat

Rename Chat

Select Tables

Optional Business Domain for Search:
Unassigned

Selected Business Domain:

Selected Tables for Displayed Chat
Sample Finance Budget Forecast Bud

Selected Tables for Next Chat
Sample Finance Budget Forecast Bud

Chat History
Demo 2
Demo 1

Message 11 | Business Domain: MANUFACTURING | 07/18/2026 4:45 PM

User Request

Copy

Which departments contributed the greatest total favorable and unfavorable variances during the fiscal year 2024? Rank departments by cumulative VarianceUSD and explain the primary financial observations that management should investigate.

Response

Copy

For FY2024, the departments ranked by cumulative VarianceUSD are: 1) Sales at \$26,963.10, 2) Marketing at \$18,998.85, 3) Operations at \$603.44, 4) Finance at -\$4,443.25, 5) HR at -\$5,940.80, and 6) IT at -\$15,779.35. Using the returned totals, Sales contributed the greatest favorable annual variance, with \$26,963.10 favorable and no unfavorable offset. IT contributed the greatest unfavorable annual variance, with -\$15,779.35 and no favorable offset. Management should also investigate Finance, because it had a large favorable component of \$20,767.37 but an even larger unfavorable component of -\$25,210.62, producing a net negative annual variance of -\$4,443.25. Marketing finished strongly favorable overall, but

Graph Points

Copy

xValue	yValue	seriesName	labelValue	xSortValue	sizeValue	sliceLabel	slic
1	-3601.28	Finance	1	0	0	0	
1	-2329.68	HR	1	0	0	0	
1	-3288.61	IT	1	0	0	0	
1	-5750.66	Marketing	1	0	0	0	

Graph

Copy

Contribution to Annual Budget Variance by Department

Type a command or request...

Send

☐ Summary ☐ Use Domain ☐ Show Tables ☐ Graph On Graph Type: NONE

Graph Title:

Select Command

Enter Line #

Execute

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Figure: Main Chat Analytics Agent screen showing the active chat, Business Domain, Selected Tables for Displayed Chat, Selected Tables for Next Chat, Chat History, message display, message navigation, request controls, and command controls.

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 Corporate Intelligence System

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Utilities

Select Analytics Tables for This Chat

Search, review, and stage one or more analytics tables before committing them to this conversation.

Business Domain

Any Text

MANUFACTURING

Name, description, spreadsheet, worksheet, subject, or ider

From Date

Through Date

mm/dd/yyyy

mm/dd/yyyy

Searches the analytics document creation date.

Reset Search

Search

Clear Selection

Commit Selected (1)

Currently Staged

1 table

☒ Select this table

API

READY

Manufacturing Real Time

AI_Manufacturing_Customer_Summary

Real Time API views of Manufacturing Database

MANUFACTURING

Spreadsheet: Manufacturing

Worksheet: AI_Manufacturing_Customer_Summary

10 rows 17 columns

View More Information

Search Results

4 tables

☐ Select this table

READY

Manufacturing Real Time

AI_Manufacturing_Inventory_Status

Real Time API views of Manufacturing Database

MANUFACTURING

Spreadsheet: Manufacturing

Worksheet: AI_Manufacturing_Inventory_Status

80 rows 23 columns

View More Information

☐ Select this table

READY

Manufacturing Real Time

AI_Manufacturing_Product_Performance

Real Time API views of Manufacturing Database

MANUFACTURING

Spreadsheet: Manufacturing

Worksheet: AI_Manufacturing_Product_Performance

72 rows 16 columns

View More Information

☐ Select this table

READY

Manufacturing Real Time

AI_Manufacturing_Production_Efficiency

Real Time API views of Manufacturing Database

MANUFACTURING

Spreadsheet: Manufacturing

Worksheet: AI_Manufacturing_Production_Efficiency

60 rows 27 columns

View More Information

☐ Select this table

READY

Manufacturing Real Time

AI_Manufacturing_Sales_Summary

Real Time API views of Manufacturing Database

MANUFACTURING

Spreadsheet: Manufacturing

Worksheet: AI_Manufacturing_Sales_Summary

72 rows 36 columns

View More Information

Figure: Select Analytics Tables screen showing the search criteria, Currently Staged tables, Search Results, local and API table cards, table selection check boxes, and Commit Selected button.

Corporate Intelligence System

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Description A_Chat

Chat with Me

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Active Chat: 2 Demo 2

\$2.796663

New Chat

Rename Chat

Select Tables

Optional Business Domain for Search:

Manufacturing

Selected Business Domain:

Selected Tables for Displayed Chat

Sample Finance Budget Forecast Bud

Selected Tables for Next Chat

AI Manufacturing Customer Summary

Chat History

Demo 2

Demo 1

GROUP BY region ORDER BY graph_y_value DESC LIMIT 10000

Message 11 | Business Domain: MANUFACTURING | 07/18/2026 4:45 PM

User Request
Copy

Which departments contributed the greatest total favorable and unfavorable variances during the fiscal year 2024? Rank departments by cumulative VarianceUSD and explain the primary financial observations that management should investigate.

Response
Copy

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Graph Points
Copy

xValue	yValue	seriesName	labelValue	xSortValue	sizeValue	sliceLabel	slic
1	-3601.28	Finance	1	0	0	0	slic
1	-2329.68	HR	1	0	0	0	slic
1	-3288.61	IT	1	0	0	0	slic
1	-5750.66	Marketing	1	0	0	0	slic

Graph
Copy

Type a command or request...

Send

☐ Summary ☐ Use Domain ☐ Show Tables ☐ Graph On Graph Type: NONE

Graph Title:

Select Command

Enter Line #

Execute

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Figure: Completed analytics message showing the message heading, original User Request, final Response, Graph Points, Copy buttons, and the beginning of the Graph section.

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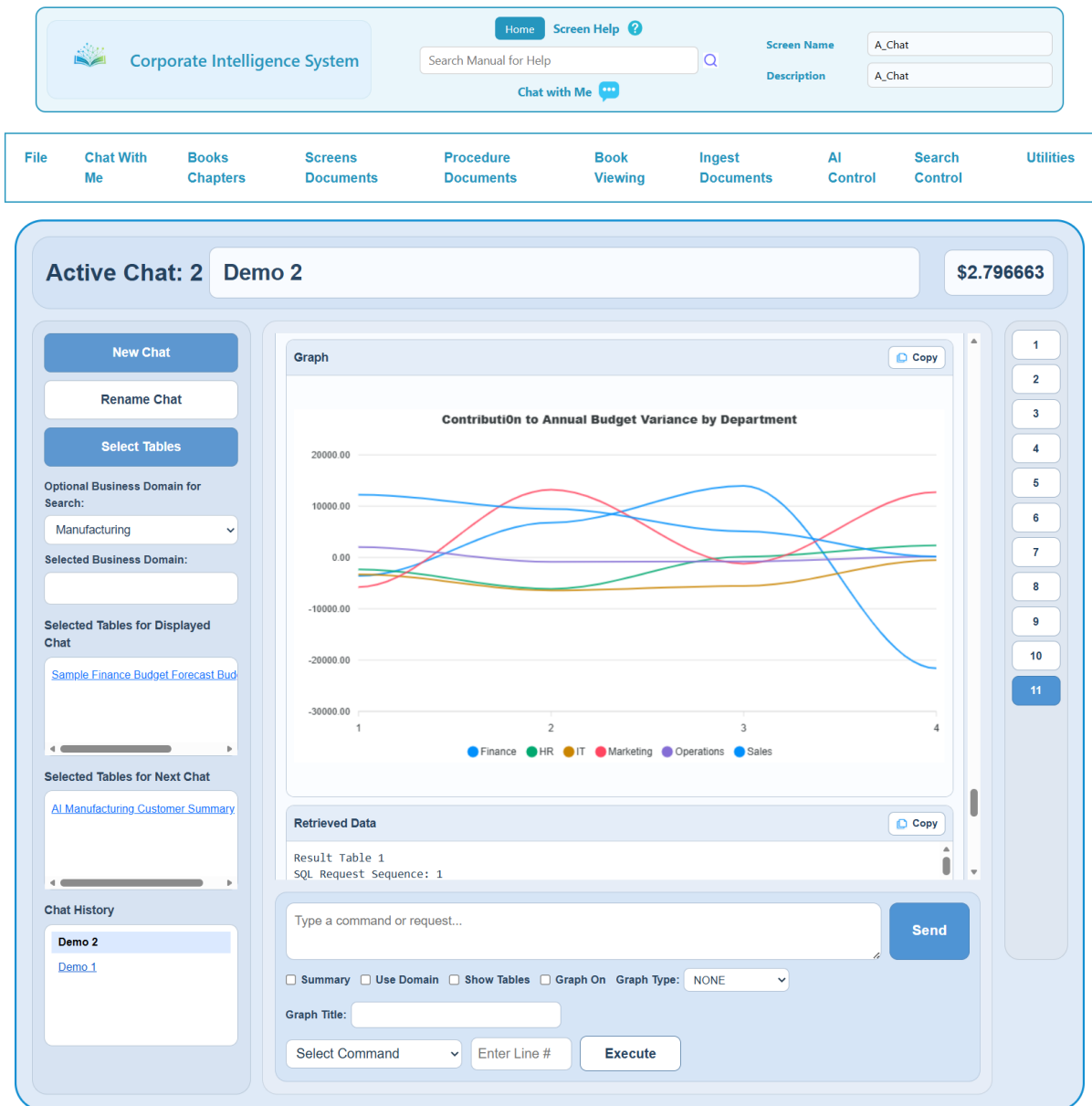


Figure: Generated analytics graph showing the graph title, axes, values, series, legend, graph controls, and Copy button.

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Active Chat: 2 Demo 2

\$2.796663

New Chat

Rename Chat

Select Tables

Optional Business Domain for Search:

Manufacturing

Selected Business Domain:

Selected Tables for Displayed Chat

Sample Finance Budget Forecast Bud

Selected Tables for Next Chat

AI Manufacturing Customer Summary

Chat History

Demo 2

Demo 1

Retrieved Data

Copy

Result Table 1
SQL Request Sequence: 1
Purpose: Retrieve FY2024 cumulative variance by department, including separate favorable and unfavor
Execution Status: OK
Row Count: 6

department_name	total_variance_usd	favorable_variance_usd	unfavorable_variance_usd	tota
Sales	26963.1	26963.1000	0.0000	329341.4900
Marketing	10000.00	35000.0000	0.0000	337624.7200
Manufacturing	10000.00	35000.0000	0.0000	356304.5900

Retrieval Plan

Copy

Analytical Objective: Identify which departments had the largest cumulative favorable and unfavorable budget variances in fiscal year 2024, rank departments by summed varianceUSD, and provide the result structure needed for management commentary on where significant positive and negative variance concentrations occurred. Selected Data Strategy: Use the single selected STD table C000001_Sample_Finance_Budget_Forecast_Budget_Forecast because it directly contains fiscalYear, dept, quarter, budgetUSD, forecastUSD, actualUSD, varianceUSD, and notes. No join is needed because all required dimensions, time buckets, and variance measures are already present in one table. Retrieval Strategy: Use one SQL request to aggregate FY2024 variance by department for ranking and favorable/unfavorable contribution analysis. Use a second SQL request to aggregate FY2024 variance by quarter and department so FINAL can support management observations with timing patterns and also populate the requested graph. Calculation Strategy: Sum varianceUSD by dept to produce cumulative annual variance. Also derive separate favorable and unfavorable totals with conditional sums on positive and negative varianceUSD so FINAL can distinguish departments driving gains versus overruns. Rank departments by cumulative summed varianceUSD in descending order, while preserving both positive and negative contribution columns. For the graph-supporting request, sum varianceUSD by quarter and dept for FY2024. Comparison Strategy: Compare departments against each other on annual total varianceUSD, favorable variance contribution, and unfavorable variance contribution. Use the quarterly department result to compare whether a department's annual position is driven by one quarter or repeated across multiple quarters. FINAL should highlight top favorable departments, top unfavorable departments, and any departments with offsetting quarter-to-quarter swings. Limitation Strategy: The schema provides only one fact-style table with FY, department, quarter, budget, forecast, actual, variance, and blank notes. There is no explicit variance sign definition beyond numeric values, so the plan assumes positive varianceUSD is favorable and negative varianceUSD is unfavorable unless business rules in FINAL state otherwise. There are no monthly dates, account categories, cost centers, or detailed

Type a command or request...

Send

☐ Summary ☐ Use Domain ☐ Show Tables ☐ Graph On Graph Type: NONE

Graph Title:

Select Command Enter Line # Execute

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Figure: Retrieved Data and Retrieval Plan sections showing the SQL result rows and the analytical strategy used to interpret, calculate, compare, and answer the request.

Corporate Intelligence System

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Active Chat: 2 Demo 2

\$2.796663

New Chat

Rename Chat

Select Tables

Optional Business Domain for Search:

Manufacturing

Selected Business Domain:

Selected Tables for Displayed Chat

Sample Finance Budget Forecast Bud

Selected Tables for Next Chat

AI Manufacturing Customer Summary

Chat History

Demo 2

Demo 1

contribution. Use the quarterly department result to compare whether a department's annual position is driven by one quarter or repeated across multiple quarters. FINAL should highlight top favorable departments, top unfavorable departments, and any departments with offsetting quarter-to-quarter swings. Limitation Strategy: The schema provides only one fact-style table with FY, department, quarter, budget, forecast, actual, variance, and blank notes. There is no explicit variance sign definition beyond numeric values, so the plan assumes positive varianceUSD is favorable and negative varianceUSD is unfavorable unless business rules in FINAL state otherwise. There are no monthly dates, account categories, cost centers, or detailed note text available, so management observations must remain at department and quarter summary level. Final Response Strategy: FINAL should use sqlRequestSet item 1 as the primary ranked department table. It should identify departments with the largest positive and negative cumulative varianceUSD, reference the separate favorable and unfavorable totals, and summarize where investigation is warranted. FINAL should use sqlRequestSet item 2 to explain whether major annual variances are concentrated in specific quarters or persistent across the year. FINAL should avoid unsupported root-cause claims beyond the available data. Graph Strategy: Although the analytical request is primarily a ranked comparison where a bar chart would normally fit better, a usable LINE graph plan is accepted because graphRequestedSw is Y and quarter provides an ordered x-axis. The graph should use FY2024 quarterly summed varianceUSD on the x-axis by quarter with department as the series to show how each department contributed to annual variance over time.

Executed SQL

Copy

SQL Request 1 / Result Table 1 Purpose: Retrieve FY2024 cumulative variance by department, including separate favorable and unfavorable contribution totals, for ranking and management commentary. Execution Status: OK Rows Returned: 6
Executed SQL: SELECT dept as department_name, SUM(varianceUSD) as total_variance_usd, SUM(CASE WHEN varianceUSD > 0 THEN varianceUSD ELSE 0 END) as favorable_variance_usd, SUM(CASE WHEN varianceUSD < 0 THEN varianceUSD ELSE 0 END) as unfavorable_variance_usd, SUM(budgetUSD) as total_budget_usd, SUM(forecastUSD) as total_forecast_usd, SUM(actualUSD) as total_actual_usd FROM C000001_Sample_Finance_Budget_Forecast_Budget_Forecast WHERE fiscalYear = 2024 GROUP BY dept ORDER BY total_variance_usd DESC, department_name ASC LIMIT 20
SQL Request 2 / Result Table 2 Purpose: Retrieve FY2024 quarterly variance by department for period-pattern analysis and line graph support. Execution Status: OK Rows Returned: 24
Executed SQL: SELECT quarter as graph_x_value, SUM(varianceUSD) as graph_y_value, dept as graph_series_value FROM C000001_Sample_Finance_Budget_Forecast_Budget_Forecast WHERE fiscalYear = 2024 GROUP BY quarter, dept ORDER BY graph_x_value ASC, graph_series_value ASC

Type a command or request...

☐ Summary
☐ Use Domain
☐ Show Tables
☐ Graph On
Graph Type: NONE

Graph Title:

Select Command

Enter Line #

Execute

Send

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Figure: Executed SQL section showing each SQL request, its purpose, execution status, returned row count, and the actual SQL statements executed by the system.

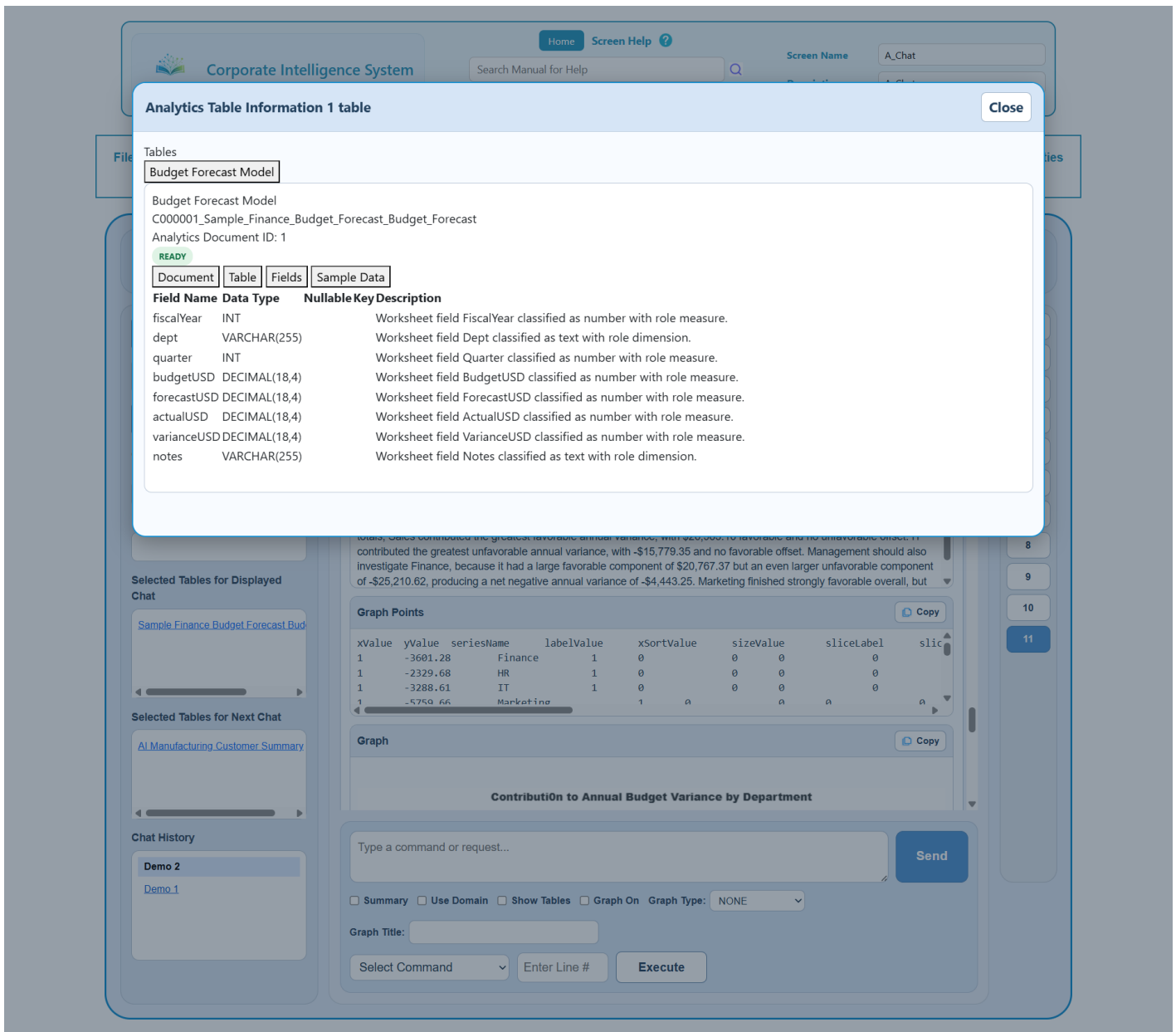


Figure: Analytics Table Information modal showing the selected table identity, Analytics Document ID, READY status, and the Document, Table, Fields, and Sample Data information sections.

300.000 - How to View Chat Analytics History

Screen | 2026-07-19 00:00:00 A_ChatsHistory

300.000 How to View Chat Analytics History

Purpose

Use the Analytics Chat History screen to locate, reopen, archive, delete, or report on previously created Chat Analytics conversations.

The screen displays the Chat Analytics conversations available to the selected user.

Standard users normally see only their own conversations.

Authorized administrative users may select another User ID and review that user's Chat Analytics history.

Each conversation record shows identifying information, activity dates, token totals, and the actions available for that conversation.

Opening The Screen

Open Analytics Chat History from the Chat Analytics or administrative navigation area provided by the system.

The screen initially displays the conversations available to the current user.

Use the search controls to narrow the list when many conversations exist.

Selecting A User

Select User ID identifies the user whose Chat Analytics conversations will be displayed.

Standard users may be restricted to their own User ID.

Authorized administrators may select another User ID to review that user's conversations.

After selecting another user, run the search again to display the conversations belonging to that user.

Only users with the required administrative rights should review another user's Chat Analytics history.

Searching Chat History

Use Any Text to search for text associated with a conversation.

The text search may locate matching conversation names or other searchable conversation information.

Use From Date and To Date to limit the results to conversations active within the required period.

Enter only the search values needed for the current review.

Press Search to display conversations matching the selected user and search criteria.

Press Cancel to clear or close the current search action, depending on the screen state.

Searching Archived Conversations

Select Search Archive when archived conversations should be included in or used for the search.

Leave Search Archive unselected when searching active conversations only.

Archived conversations remain stored for historical or audit purposes but are separated from the normal active conversation list.

Use archive searching when a conversation no longer appears in the standard active results.

Conversation Results

Each result row represents one Chat Analytics conversation.

The result table displays the User ID, Conversation ID, Chat Name, Start Date, Last Date, Input Tokens, Output Tokens, and Total Tokens.

The Actions column provides the available commands for the conversation.

User ID

User ID identifies the owner of the Chat Analytics conversation.

Administrative users should verify the User ID before selecting, deleting, archiving, or reporting on a conversation.

Conversation ID

Conversation ID is the system identifier assigned to the Chat Analytics conversation.

The Conversation ID helps distinguish conversations that may have similar names.

Technical support may request the Conversation ID when investigating a problem.

Chat Name

Chat Name is the user assigned name of the conversation.

A descriptive Chat Name makes it easier to locate and recognize the conversation later.

Start Date And Last Date

Start Date shows when the Chat Analytics conversation was created.

Last Date shows the most recent activity recorded for the conversation.

Use these dates to identify recent conversations or conversations from a specific reporting period.

Token Information

Input Tokens shows the total input tokens processed for the conversation.

Output Tokens shows the total output tokens generated for the conversation.

Total Tokens shows the combined input and output token usage for the conversation.

Token totals help administrators and users understand the relative processing volume associated with a conversation.

Long conversations, complex analytical plans, large data requests, multiple SQL operations, detailed responses, and graph generation may increase token usage.

Selecting A Conversation

Press Select to reopen the selected conversation in the Chat Analytics Agent.

The Chat Analytics screen opens with that conversation as the active chat.

The saved message history, selected conversation information, and available analytics context are restored.

Use Select when you want to review prior responses or continue asking related analytical questions.

Deleting A Conversation

Press Delete to remove the selected Chat Analytics conversation.

Deleting a conversation removes the complete chat and its related stored message information according to the system deletion process.

The deletion may include requests, responses, graph points, graph information, retrieved data, retrieval plans, executed SQL, token information, and other stored conversation records.

Delete should be used only when the conversation is no longer required.

Review the User ID, Conversation ID, and Chat Name carefully before deleting.

Deletion may be permanent and may not be reversible.

Use Archive instead of Delete when the conversation should be preserved for historical, audit, management, or support purposes.

Archiving A Conversation

Press Archive to move the selected conversation from the active conversation list into the archive.

Archiving preserves the conversation while removing it from the normal active history results.

Archived conversations may be located later by selecting Search Archive and running the search.

Use Archive when a conversation is complete but should remain available for future reference.

Archiving is normally safer than deleting when there is uncertainty about whether the conversation may be needed later.

Running A Chat Report

Press Run Report to generate the complete Analytics Chat Session Report for the selected conversation.

The report provides a formal record of the conversation and its analytical processing.

The report may include conversation information, message statistics, token statistics, user requests, responses, graph points, graphs, retrieved data, retrieval plans, executed SQL, and related processing information.

The report is useful for executive review, documentation, audit, validation, troubleshooting, technical review, and preservation of analytical results.

The generated report may contain many pages when the conversation includes multiple messages, detailed result tables, extensive graph points, or large SQL statements.

A separate help section explains how to read and use the Analytics Chat Session Report.

Report Contents

The report begins with the conversation identity and summary information.

Conversation information may include User ID, Conversation ID, Conversation Name, status, Start Date, and Last Activity.

Message statistics may show the total number of messages, messages requesting graphs, and stored graph images.

Token statistics may show input, output, and total tokens for the session and its processing stages.

Each message may include the Business Domain, date and time, request type, response type, graph type, token usage, original request, final response, graph points, retrieved data, retrieval plan, executed SQL, and graph.

The report preserves the transparency information displayed by the Chat Analytics Agent.

The generated report for a conversation can therefore serve as a complete analytical session record.
:contentReference[oaicite:0]{index=0}

Recommended Workflow

Select the correct User ID.

Enter Any Text, From Date, To Date, or Search Archive criteria when needed.

Press Search.

Review the User ID, Conversation ID, Chat Name, dates, and token totals.

Press Select to reopen and continue a conversation.

Press Archive to preserve a completed conversation outside the active list.

Press Run Report to create a complete analytical session report.

Press Delete only when the entire conversation should be permanently removed.

WhereToFind

Main Menu to Chat With Me to Analytics Chat History.

ButtonsAndActions

Search runs the selected User ID, archive, text, and date criteria.

Cancel clears or closes the current search action.

Select opens the selected conversation in the Chat Analytics Agent.

Delete removes the selected conversation and its related stored chat information.

Archive moves the selected conversation from active history into archived history.

Run Report generates the complete Analytics Chat Session Report for the selected conversation.

FieldsOrSettings

Select User ID identifies the user whose conversations will be searched.

Search Archive controls whether archived conversations are searched.

Any Text searches available conversation text and identifying information.

From Date limits results to the beginning of the required date range.

To Date limits results to the end of the required date range.

User ID identifies the owner of the conversation.

Conversation ID identifies the system conversation record.

Chat Name displays the user assigned conversation name.

Start Date displays the date the conversation began.

Last Date displays the date of the most recent conversation activity.

Input Tokens displays the total input token usage.

Output Tokens displays the total output token usage.

Total Tokens displays the combined input and output token usage.

RulesAndValidations

A valid User ID must be selected before searching.

Standard users may search only their own conversations unless additional rights are granted.

Administrative users must verify the selected User ID before performing an action.

From Date should not be later than To Date.

Use valid dates when entering a date range.

Search Archive must be selected to locate conversations that have been archived.

Verify the Conversation ID and Chat Name before selecting an action.

Do not delete a conversation when it may be needed for audit, management review, support, or future analysis.

Archive the conversation instead when preservation is required.

Run the report before deleting when a permanent record of the conversation is required.

Reports may contain confidential business data and should be stored securely.

DownstreamEffects

Select changes the active conversation in the Chat Analytics Agent.

Delete removes the selected conversation and related stored analytical records according to the system deletion process.

Archive changes the conversation status and removes it from the normal active search results.

Run Report creates a report containing the stored analytical conversation information.

Administrative user selection may expose conversations belonging to another user and must be controlled by security permissions.

Examples

Example 1: Search your active conversations for the text Budget and reopen the matching conversation by pressing Select.

Example 2: Enter a From Date and To Date to locate conversations created during a monthly reporting period.

Example 3: Select Search Archive to find a completed conversation that was previously archived.

Example 4: Press Run Report to create a complete record of an executive inventory analysis.

Example 5: Archive an old conversation that should no longer appear in active history but must remain available for future reference.

Example 6: An administrator selects another User ID to review that user's analytics conversations for authorized support or audit work.

Troubleshooting

If no conversations appear, verify the selected User ID and remove unnecessary search criteria.

If an expected conversation is missing, select Search Archive and search again.

If a text search returns no results, use fewer or broader search words.

If a date search returns no results, verify the From Date and To Date.

If Select opens the wrong conversation, return to Chat History and verify the Conversation ID and Chat Name.

If an archived conversation still appears in active results, refresh the search and confirm whether Search Archive is selected.

If Run Report takes time to complete, allow the report process to finish because large conversations may contain many messages, result rows, graph points, graphs, plans, and SQL statements.

If the report does not open or download, stop and report the problem for technical review.

If Delete does not respond as expected, do not assume the conversation was removed.

Refresh the search and report the issue for technical review.

If another user's conversations cannot be selected, verify that the current user has administrative access.

SecurityAndAccess

Users may view only the conversations allowed by their security rights.

Administrative access is required to select and review another user's conversations.

Chat Analytics conversations may contain confidential financial, payroll, inventory, customer, employee, supplier, operational, or management information.

Do not open, report, archive, delete, copy, or distribute another user's conversation unless authorized.

Generated reports may contain requests, responses, graph data, retrieved records, analytical plans, and executed SQL.

Store and distribute generated reports according to company security and privacy requirements.

Delete access should be restricted because deletion may permanently remove the complete analytical history.

Images

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Analytics Chat History

Select User ID

Search Archive
☐

Any Text

From Date

To Date

Actions	UserID	ConversationID	ChatName	StartDate	LastName	Input Tokens	Output Tokens	Total Tokens
Select Delete Archive Run Report	ivan	2	Demo 2	07/14/2026	07/19/2026	901309	36226	937535
Select Delete Archive Run Report	ivan	1	Demo 1	07/11/2026	07/11/2026	0	0	0

Figure: Analytics Chat History screen showing User ID selection, archive search, text and date search criteria, conversation records, token totals, and the Select, Delete, Archive, and Run Report actions.

500.000 - Search and List Chat Analytics Documents

Screen | 2026-07-19 00:00:00 A_DocList

500.000 Search and List Chat Analytics Documents

Purpose

The Search and List Chat Analytics Documents screen provides access to every Analytics Workbook and Analytics Table available for use by the Chat Analytics Agent.

This screen allows users to locate Analytics Documents, review their contents, download the original workbook, and examine detailed metadata describing each Analytics Table before using it in an Analytics Chat.

The screen serves as the primary catalog for all Analytics Tables available within the Corporate Intelligence System.

Overview

Each row in the grid represents one Analytics Table.

A single workbook may contain multiple worksheets.

Each worksheet becomes a separate Analytics Table and therefore appears as a separate row within the document list.

This allows users to select only the business information relevant to their analytical requirements.

Searching For Analytics Documents

The upper portion of the screen contains several search filters.

These filters allow users to quickly locate Analytics Tables from large document libraries.

Users may search using one or more criteria simultaneously.

The displayed grid automatically reflects the search results.

Available Search Criteria

From Date.

To Date.

Business Domain.

Document Category.

Document Subject.

Search Keyword 1.

Search Keyword 2.

Search Keyword 3.

Any Text.

Search Recommendations

Search by Business Domain to locate documents related to a specific business area.

Search by Document Category to locate a particular type of Analytics Workbook.

Use Keywords to locate documents associated with specific business topics.

Use the Any Text search when only part of the document description, worksheet name, or Analytics Table name is known.

Multiple search criteria may be combined to reduce the number of matching documents.

The Results Grid

The lower portion of the screen displays every Analytics Table matching the selected search criteria.

Each row represents one Analytics Table that may be used by the Chat Analytics Agent.

If a workbook contains multiple worksheets, each worksheet appears as a separate Analytics Table.

Grid Columns

The grid displays important information describing every Analytics Table.

Typical information includes:

Document ID.

Workbook Name.

Spreadsheet Name.

Worksheet Name.

Analytics Table Name.

Download Workbook

The Download Workbook button downloads the original Excel workbook associated with the selected Analytics Table.

This allows users to review the original spreadsheet outside the Corporate Intelligence System.

The downloaded workbook may also be used for documentation, auditing, verification, or future updates.

Analytics Information Button

The Question Mark button opens the Analytics Table Information window.

This window displays detailed information describing the selected Analytics Table.

Reviewing this information before beginning an Analytics Chat helps users understand exactly what business information is contained within the selected table.

Analytics Table Information Window

The Analytics Table Information window displays the metadata associated with the selected Analytics Table.

This metadata documents both the business meaning and technical characteristics of the table.

Information Available

The information window may include:

Analytics Table Name.

Analytics Document ID.

Processing Status.

Business Domain.

Document Category.

Document Subject.

Description.

Original Workbook Name.

Spreadsheet Name.

Worksheet Name.

Analytics Table Name.

Information Tabs

The information window contains several tabs that provide progressively more detailed information about the Analytics Table.

Document Tab

Displays the general document information and descriptive metadata associated with the Analytics Table.

Table Tab

Displays technical information describing the Analytics Table created during the ingestion process.

Fields Tab

Displays every field contained within the Analytics Table together with the associated metadata describing each field.

This information helps users understand what business information is available for analysis.

Sample Data Tab

Displays representative sample records from the Analytics Table.

Reviewing the sample data allows users to understand the structure, content, and business meaning of the information before beginning an Analytics Chat.

Why Review The Information Window

Reviewing the Analytics Table Information window before performing analysis is highly recommended.

Understanding the available fields and sample data allows users to formulate better Chat Analytics prompts.

Better understanding of the available data generally produces more accurate and more meaningful executive analyses.

Typical Workflow

Search for the desired Analytics Document.

Review the matching Analytics Tables.

Open the Analytics Table Information window.

Review the Document, Table, Fields, and Sample Data tabs.

Download the workbook if additional review is required.

Select the Analytics Table within the Chat Analytics Agent.

Begin asking executive business intelligence questions.

Recommended Usage

Review the field definitions before writing Chat Analytics prompts.

Review the sample data to understand the business values stored in the Analytics Table.

Download the workbook whenever additional business documentation is required.

Use Business Domains and Keywords to organize large Analytics Document libraries.

Become familiar with the available Analytics Tables before beginning complex business analyses.

Rules And Validations

Each worksheet is represented as a separate Analytics Table.

Multiple Analytics Tables may originate from the same workbook.

The Analytics Table Information window is read only.

Downloading a workbook does not modify the Analytics Document.

Search criteria affect only the displayed document list and do not modify any Analytics Tables.

Benefits

Provides a centralized catalog of all Analytics Tables.

Makes Analytics Documents easy to locate.

Allows users to understand available business information before analysis.

Provides transparency into Analytics Table metadata.

Improves the quality of Chat Analytics prompts.

Reduces analytical errors by allowing users to verify available fields and sample data before beginning

an Analytics Chat.

Images

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Document List

From Date

Any Text

To Date

Business Domain
All Business Domains

Document Category
All Categories

Document Subject
All Subjects

Search Keyword 1
All Keyword 1

Search Keyword 2
All Keyword 2

Search Keyword 3
All Keyword 3

Go to Page [1] of 1
Records: 12

Action	Doc ID	Workbook Name	Spreadsheet Name	Worksheet Name	Analytics Table
Download Workbook ?	12	Manufacturing.xlsx	Manufacturing	AI_Manufacturing_Sales_Summ...	AI_Manufacturing_Sales_Summary
Download Workbook ?	11	Manufacturing.xlsx	Manufacturing	AI_Manufacturing_Product_Perf...	AI_Manufacturing_Product_Performance
Download Workbook ?	10	Manufacturing.xlsx	Manufacturing	AI_Manufacturing_Production_E...	AI_Manufacturing_Production_Efficiency
Download Workbook ?	9	Manufacturing.xlsx	Manufacturing	AI_Manufacturing_Inventory_St...	AI_Manufacturing_Inventory_Status
Download Workbook ?	8	Manufacturing.xlsx	Manufacturing	AI_Manufacturing_Customer_Su...	AI_Manufacturing_Customer_Summary
Download Workbook ?	7	Sample_Accounting.xlsx	Sample_Accounting	Expense_Claims	C000007_Sample_Accounting_Expense_Cle
Download Workbook ?	6	Sample_Accounting.xlsx	Sample_Accounting	Accounts_Receivable	C000006_Sample_Accounting_Accounts_Re
Download Workbook ?	5	Sample_Accounting.xlsx	Sample_Accounting	Accounts_Payable	C000005_Sample_Accounting_Accounts_Pa
Download Workbook ?	4	Sample_Accounting.xlsx	Sample_Accounting	General_Ledger	C000004_Sample_Accounting_General_Led
Download Workbook ?	3	Sample_Operations_Retail_Inventory_...	Sample_Operations_Retail_Inve...	Formula_Guide	C000003_Sample_Operations_Retail_Invent
Download Workbook ?	2	Sample_Operations_Retail_Inventory_...	Sample_Operations_Retail_Inve...	Retail_Inventory_Analytics	C000002_Sample_Operations_Retail_Invent
Download Workbook ?	1	Sample_Finance_Budget_Forecast.xlsx	Sample_Finance_Budget_Forec...	Budget_Forecast	C000001_Sample_Finance_Budget_Forecas

Figure 1. The Search and List Chat Analytics Documents screen showing the document search filters, Analytics Document grid, Download Workbook button, and Analytics Information button used to view detailed information about each Analytics Table.

Corporate Intelligence System

Home Screen Help ?

Screen Name A_DocList

Search Manual for Help

Analytics Table Information 1 table Close

Tables

Manufacturing Real Time

AI_Manufacturing_Sales_Summary

Analytics Document ID: 12

READY

Document Table Fields Sample Data

Business Domain

MANUFACTURING

Document Category

ANALYTICS_WORKBOOK

Document Subject

Manufacturing Real Time

Description

Real Time API views of Manufacturing Database

Original File Name

Manufacturing.xlsx

Spreadsheet Name

Manufacturing

Worksheet Name

AI_Manufacturing_Sales_Summary

Download Workbook	?	10	Manufacturing.xlsx	Manufacturing	AI_Manufacturing_Production_E...	AI_Manufacturing_Production_Efficiency
Download Workbook	?	9	Manufacturing.xlsx	Manufacturing	AI_Manufacturing_Inventory_St...	AI_Manufacturing_Inventory_Status
Download Workbook	?	8	Manufacturing.xlsx	Manufacturing	AI_Manufacturing_Customer_Su...	AI_Manufacturing_Customer_Summary
Download Workbook	?	7	Sample_Accounting.xlsx	Sample_Accounting	Expense_Claims	C000007_Sample_Accounting_Expense_Cle
Download Workbook	?	6	Sample_Accounting.xlsx	Sample_Accounting	Accounts_Receivable	C000006_Sample_Accounting_Accounts_Re
Download Workbook	?	5	Sample_Accounting.xlsx	Sample_Accounting	Accounts_Payable	C000005_Sample_Accounting_Accounts_Pa
Download Workbook	?	4	Sample_Accounting.xlsx	Sample_Accounting	General_Ledger	C000004_Sample_Accounting_General_Led
Download Workbook	?	3	Sample_Operations_Retail_Inventory_...	Sample_Operations_Retail_Inve...	Formula_Guide	C000003_Sample_Operations_Retail_Invent
Download Workbook	?	2	Sample_Operations_Retail_Inventory_...	Sample_Operations_Retail_Inve...	Retail_Inventory_Analytics	C000002_Sample_Operations_Retail_Invent
Download Workbook	?	1	Sample_Finance_Budget_Forecast.xlsx	Sample_Finance_Budget_Forec...	Budget_Forecast	C000001_Sample_Finance_Budget_Forecas

Figure 2. Analytics Table Information window displaying the Document, Table, Fields, and Sample Data tabs together with the metadata describing the selected Analytics Table.

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 | 2026-05-21 20:02:28 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.

900.000 - Procedures for Spreadsheets

900.010 - Regular Spreadsheet Chat Session

Procedure | 2026-07-18 19:21:07 Regular Spreadsheet Chat Session / Procedures for Spreadsheets

900.010 Regular Spreadsheet Chat Session

Purpose

This procedure explains how to create a Regular Spreadsheet Chat Session. A Regular Spreadsheet Chat is intended for asking questions about a spreadsheet using the standard Chat interface. It is best suited for relatively small spreadsheets or questions involving information that is closely grouped together.

If extensive analysis, statistical calculations, trend analysis, executive reporting, or graph generation is required, use an Analytics Spreadsheet Session instead.

Prerequisites

Before beginning this procedure verify that the spreadsheet complies with the spreadsheet standards described in Chapter 496.000 General Spreadsheet Rules.

The spreadsheet should contain meaningful worksheet names, valid column headings, and no blank rows.

Procedure

Step 1 - Create A New Chat Session

Open the Corporate Intelligence System and create a new Chat session.

Creating a new session establishes a separate conversation that will contain the uploaded spreadsheet and all subsequent questions and responses.

Step 2 - Select Spreadsheet Upload

Select the option to upload a spreadsheet into the Chat session.

Navigate to the desired Microsoft Excel workbook and select the file.

Step 3 - Upload The Spreadsheet

Start the upload process and wait for the spreadsheet to finish loading.

During this process the system converts the spreadsheet into text and divides the information into logical information chunks that can be used by the AI.

Follow the screen instructions by clicking the ? on the top of the page for instructions on how to fill out the screen detail information .

To control AI processing costs only a representative subset of those information chunks is normally transmitted to the Large Language Model when answering questions. All spreadsheet chunks remain stored within the Corporate Intelligence System.

Step 4 - Verify Successful Ingestion

After the upload completes verify that the spreadsheet was successfully ingested.

Confirm that the worksheet names were recognized and that no ingestion errors or validation messages were reported.

If validation errors are reported correct the spreadsheet and upload it again before continuing.

Step 5 - Begin Asking Questions

Once the spreadsheet has been successfully ingested begin asking questions using natural language.

The AI does not require SQL commands or programming knowledge. Questions may be written in normal business language.

Step 6 - Continue The Conversation

Continue asking additional questions within the same Chat session.

The AI maintains the conversation context and can answer follow-up questions based upon previous questions whenever appropriate.

Typical Questions

A Regular Spreadsheet Chat is intended for information retrieval rather than detailed business analytics.

Typical questions include locating a customer, finding an invoice number, determining an account balance, identifying a product description, locating an order, or retrieving information contained within a particular row or closely related group of rows.

When To Use Analytics Instead

If the questions require examining the entire spreadsheet, comparing many records, identifying trends, calculating statistics, grouping information, summarizing data, or generating charts and graphs, the spreadsheet should instead be loaded into an Analytics Chat Session.

The Analytics Chat loads every row and every column into the Analytics Database, making the complete dataset available for advanced analysis.

Common Problems

If the spreadsheet does not upload successfully verify that it complies with the spreadsheet standards described in Chapter 496.000.

Common problems include invalid worksheet names, missing column headings, blank rows, unsupported spreadsheet formats, or improperly named fields.

Summary

A Regular Spreadsheet Chat Session provides a simple and efficient method for asking business

questions about spreadsheet data using natural language. It is ideal for general information retrieval and routine business questions. For executive reporting, advanced analysis, graph generation, or operational database analysis, an Analytics Chat Session should be used.

900.020 - Create An Analytics Spreadsheet Session

Procedure | 2026-07-19 00:06:45 [Create An Analytics Spreadsheet Session](#) / [Procedures for Spreadsheets](#)

900.020 Create An Analytics Spreadsheet Session

Purpose

This procedure explains how to create an Analytics Spreadsheet Session. Unlike a Regular Spreadsheet Chat Session, an Analytics Spreadsheet Session loads every row and every column of the spreadsheet into the Analytics Database, allowing the Analytics Chat to perform calculations, statistical analysis, trend analysis, grouping, filtering, comparisons, executive reporting, and graph generation.

An Analytics Spreadsheet Session may be used with either a static Microsoft Excel spreadsheet or a real-time operational database view accessed through an API.

Prerequisites

Before beginning this procedure verify that the spreadsheet complies with the spreadsheet standards described in Chapter 496.000 General Spreadsheet Rules.

The spreadsheet should contain meaningful worksheet names, valid column headings, and no blank rows.

Follow the screen instructions by clicking the ? on the top of the page for instructions on how to fill out the screen detail information.

Procedure

Step 1 - Create A New Analytics Session

Open the Corporate Intelligence System and create a new Analytics Chat Session.

A new Analytics Session creates a dedicated Analytics Database structure for the spreadsheet being loaded.

Step 2 - Select The Spreadsheet

Select the Microsoft Excel spreadsheet that will be analyzed and begin the upload process.

Step 3 - Upload The Spreadsheet

Upload the spreadsheet and wait for the ingestion process to complete.

Unlike a Regular Spreadsheet Chat Session, every row and every column of every worksheet is loaded into the Analytics Database so the complete dataset is available for analysis.

Step 4 - Specify The Analytics Source

After the spreadsheet has been uploaded a checkbox is provided to identify whether the spreadsheet

represents a static spreadsheet or a database view that will later be accessed through an API.

For normal Microsoft Excel spreadsheets leave this checkbox unchecked.

Select the checkbox only when the spreadsheet represents a sample of a database view that will be used for real-time operational analytics through an API connection.

This setting tells the system whether the Analytics Database will receive data directly from the uploaded spreadsheet or from a live operational database.

Step 5 - Verify Successful Ingestion

After the upload completes verify that the Analytics Database table was created successfully.

Review any validation messages and correct any reported problems before continuing.

Step 6 - Begin Analytics

Once the spreadsheet has been successfully ingested begin asking analytical questions using natural language.

The Analytics Chat can summarize information, perform calculations, identify trends, compare periods, group information, calculate statistics, and generate graphs using the complete dataset.

Step 7 - Continue The Analytics Session

Continue asking additional questions within the same Analytics Session.

The Analytics Chat maintains the conversation context and uses the complete Analytics Database throughout the session.

Static Spreadsheet Analytics

When the spreadsheet is a standard Microsoft Excel workbook all analysis is performed using the information contained within that spreadsheet.

This method is ideal for historical reports, monthly summaries, financial statements, inventory reports, budgeting information, and other static business data.

API Based Operational Analytics

When the spreadsheet represents a database view the uploaded spreadsheet serves as the structural definition for the Analytics Database.

After the API connection has been configured, the Analytics Chat retrieves current information directly from the operational database rather than from the uploaded spreadsheet.

This allows users to analyze current business information without repeatedly exporting spreadsheets.

Common Problems

If the spreadsheet does not load successfully verify that it complies with the spreadsheet standards described in Chapter 496.000.

If the spreadsheet represents an API database view verify that the worksheet name exactly matches the database view name and that the spreadsheet structure matches the database view.

Do not select the API checkbox for ordinary Microsoft Excel spreadsheets because doing so will prevent the Analytics Session from being configured correctly.

Summary

An Analytics Spreadsheet Session is used whenever complete spreadsheet analysis, executive reporting, graph generation, statistical analysis, or real-time operational database analytics is required. For ordinary spreadsheet question and answer conversations use a Regular Spreadsheet Chat Session instead.

900.030 - Prepare A Spreadsheet For Analytics

Procedure | 2026-07-18 19:27:53 Prepare A Spreadsheet For Analytics / Procedures for Spreadsheets

900.030 Prepare A Spreadsheet For Analytics

Purpose

This procedure explains how to prepare a spreadsheet before it is loaded into an Analytics Spreadsheet Session. Proper spreadsheet preparation improves ingestion accuracy, reduces implementation time, and ensures that the Analytics Chat correctly understands the structure and meaning of the data.

The preparation process differs depending on whether the spreadsheet will be used for static spreadsheet analytics or for real-time operational analytics using an API.

Prerequisites

Before beginning this procedure review Chapter 496.000 General Spreadsheet Rules.

Follow the screen instructions by clicking the ? on the top of the page for instructions on how to fill out the screen detail information.

Procedure

Step 1 - Determine The Analytics Source

Determine whether the Analytics Session will use a static Microsoft Excel spreadsheet or a real-time operational database accessed through an API.

This decision determines how the spreadsheet will be prepared.

Step 2 - Verify Spreadsheet Standards

Verify that the spreadsheet complies with all spreadsheet standards described in Chapter 496.000.

Confirm that worksheet names are valid, column headings are meaningful, Camel Case naming conventions are used, and blank rows have been removed.

Step 3 - Verify Column Headings

The first row of every worksheet must contain descriptive column headings.

Each subsequent row must contain data that corresponds to those headings.

Meaningful business names such as CustomerName, InvoiceDate, ProductNumber, QuantityOnHand, and FiscalYear should be used whenever possible.

Step 4 - Verify Data Quality

Review the spreadsheet for missing information, duplicate columns, inconsistent values, or other data quality problems.

Blank cells are acceptable and will be converted to NULL values during ingestion.

However, unnecessary blank rows and unused columns should be removed before loading the spreadsheet.

Preparing A Static Analytics Spreadsheet

When the spreadsheet will be used for static analytics no additional preparation is normally required after the spreadsheet standards have been verified.

During the Analytics Spreadsheet creation process leave the API View checkbox unchecked.

The complete spreadsheet will be loaded into the Analytics Database and all rows and columns will become available for analysis.

This method is recommended for historical reports, exported business information, financial statements, inventory reports, budgeting information, and other static datasets.

Preparing A Spreadsheet For API Analytics

When the Analytics Session will retrieve information from a live operational database the spreadsheet serves a different purpose.

Instead of representing the production dataset, the spreadsheet becomes the structural definition used by the Analytics Chat to understand the database view.

The worksheet name should match the corresponding database view name whenever possible.

The worksheet columns must exactly match the fields returned by the database view.

The worksheet should normally contain no more than twenty representative rows of sample production data.

The sample data should include typical values that accurately represent the information returned by the database view.

This sample spreadsheet allows the Analytics Chat to identify field names, data types, sample values, and the overall structure of the operational data before the live API is used.

If the spreadsheet was created by exporting data directly from the operational database and does not comply with the spreadsheet standards, modify the spreadsheet as necessary before it is loaded into the Analytics Database.

During the Analytics Spreadsheet creation process select the API View checkbox.

Selecting this checkbox displays an additional configuration panel used to define the API connection information.

The API configuration panel includes the API URL and a list of all workbook names contained within the spreadsheet.

For each workbook enter the actual database view name that will be used by the operational database.

This step is especially important when the Microsoft Excel worksheet name exceeds the maximum worksheet name length and has been truncated.

Because Microsoft Excel limits worksheet names to thirty-one characters, the displayed worksheet name may not exactly match the actual database view name.

When this occurs enter the complete database view name in the View Name field provided on the API configuration panel.

If the correct database view name is not entered, the Corporate Intelligence System will not be able to locate the corresponding database view and the API retrieval will fail.

Step 5 - Perform A Final Review

Before loading the spreadsheet perform a final review to verify that the worksheet names, column headings, sample data, and API configuration information accurately represent the operational data that will be analyzed.

Correct any remaining issues before beginning the Analytics Spreadsheet Session.

Summary

Preparing a spreadsheet correctly is one of the most important steps in the Analytics implementation process.

Static Analytics Spreadsheets contain the complete business dataset that will be analyzed and should be loaded with the API View checkbox unchecked.

API Analytics Spreadsheets contain only a representative sample of the operational database structure and require the API View checkbox to be selected so that the API connection information and actual database view names can be configured correctly.

900.040 - Create A Sample Spreadsheet For API Analytics

Procedure | 2026-07-19 00:06:16 Create A Sample Spreadsheet For API Analytics / Procedures for Spreadsheets

900.040 Create A Sample Spreadsheet For API Analytics

Purpose

This procedure explains how to prepare the sample spreadsheet required for Real-Time API Analytics. Unlike a static Analytics Spreadsheet, the sample spreadsheet is not intended to contain the complete production dataset. Its purpose is to define the structure of the operational database so the Analytics

Chat can correctly interpret live data returned by the customer API.

The sample spreadsheet becomes the blueprint used by the Corporate Intelligence System to identify worksheets, columns, data types, and representative business values.

Prerequisites

Before beginning this procedure review Chapter 496.000 General Spreadsheet Rules.

Follow the screen instructions by clicking the ? on the top of the page for instructions on how to fill out the screen detail information.

Procedure

Step 1 - Create The Database Views

Create one database view for each business dataset that will be available to the Analytics Chat.

Each view should return only the information required for analytics and should not expose unnecessary operational tables or confidential information.

The view should present clean, meaningful business data using descriptive column names.

Step 2 - Create The API

Create an API that allows the Corporate Intelligence System to retrieve information from the database views.

Sample API implementations are provided for MySQL, Microsoft SQL Server, Oracle, and PostgreSQL.

The sample implementation located in /api/manufacture.php demonstrates database connectivity, SQL translation, request processing, and response generation for the supported database platforms.

Step 3 - Export Sample Data

Export a representative sample of data from each database view into a Microsoft Excel spreadsheet.

Each worksheet should normally contain no more than twenty rows of representative production data.

The purpose of the sample data is to demonstrate the structure and content of the database view, not to duplicate the complete operational database.

The sample should contain enough records to demonstrate normal business values, dates, numeric fields, text fields, and any common business conditions that may be encountered during analysis.

Step 4 - Verify Worksheet Names

Verify that every worksheet name complies with the spreadsheet naming standards described in Chapter 496.000.

Worksheet names should match the database view names whenever possible.

If a database view name exceeds the Microsoft Excel worksheet name limit of thirty-one characters, use the closest practical worksheet name and later enter the complete database view name during the API

configuration process.

Step 5 - Verify Column Names

Verify that every column heading follows the Corporate Intelligence System naming standards.

Column names should use Camel Case formatting and meaningful business terminology.

Date fields should contain the word Date whenever practical.

Year and Month fields should include the words Year or Month as appropriate.

The column names in the spreadsheet should exactly match the fields returned by the database view.

Step 6 - Verify Spreadsheet Quality

Verify that the first row of every worksheet contains the column headings.

Verify that all subsequent rows contain representative data.

Remove unnecessary blank rows and unused columns before saving the spreadsheet.

Blank field values are acceptable and will be converted to NULL values during ingestion.

Step 7 - Save The Sample Spreadsheet

Save the completed spreadsheet using Microsoft Excel.

This spreadsheet will later be loaded into the Analytics Database to define the structure used by the Analytics Chat for Real-Time API Analytics.

Why A Sample Spreadsheet Is Required

The sample spreadsheet teaches the Analytics Chat how to interpret the operational database before live data is requested through the API.

During ingestion the system analyzes the worksheet names, column names, representative values, and data types to build the Analytics Database structure.

This allows the Analytics Chat to understand the meaning of the operational data and generate accurate SQL queries and business analysis when users submit questions.

Because only the structure is required, a small representative sample is sufficient. Exporting the complete production database provides no additional benefit and unnecessarily increases implementation time.

Summary

A properly prepared sample spreadsheet is a critical component of every Real-Time Analytics implementation.

The implementation consists of four major steps: create the database views, create the API, export a representative spreadsheet containing no more than approximately twenty rows for each worksheet,

and verify that the worksheet names and column names comply with the Corporate Intelligence System standards before loading the spreadsheet into the Analytics Database.

900.050 - Configure A Real-Time Analytics Data Source

Procedure | 2026-07-19 00:14:01 Configure A Real-Time Analytics Data Source / Procedures for Spreadsheets

900.050 Configure A Real-Time Analytics Data Source

Purpose

This procedure explains how to configure a Real-Time Analytics data source that allows the Corporate Intelligence System to retrieve live operational information from a customer's database.

The Real-Time Analytics API is created from the approved database views developed during Procedure 900.040. The API provides a secure interface between the Corporate Intelligence System and the customer's operational database.

The API receives controlled analytics requests, translates the SQL syntax to the customer's database platform when necessary, executes the approved query against the database views, and returns the requested information as JSON.

Prerequisites

Complete Procedure 900.040 Create A Sample Spreadsheet For API Analytics.

Verify that all database views have been created and tested.

Verify that the sample spreadsheet accurately represents the approved database views.

Follow the screen instructions by clicking the ? on the top of the page for instructions on how to fill out the screen detail information.

Procedure

Step 1 - Generate The Customer API

Create the Customer Analytics API using the approved database views created during Procedure 900.040.

The API should never retrieve information directly from operational application tables.

All analytics requests should retrieve information exclusively through the approved database views.

Step 2 - Configure The Database Connection

Configure the API to connect to the customer's operational database.

The connection should use a dedicated database account having read-only access to the approved analytics views.

Administrative accounts and accounts having update, insert, delete, or schema modification privileges should never be used.

Step 3 - Configure Database Credentials

Enter the database server name, database name, user name, password, communication port, and any additional connection parameters required by the selected database platform.

Verify that the API successfully connects to the designated database before continuing.

Step 4 - Configure SQL Translation

The Corporate Intelligence System generates a database-independent SQL request.

The Customer API is responsible for translating that request into the SQL syntax required by the customer's database platform before execution.

Sample SQL translation routines are provided for MySQL/MariaDB, Microsoft SQL Server, Oracle, and PostgreSQL.

This allows the same Analytics Chat request to execute correctly regardless of the customer's database platform.

Step 5 - Implement The Request Contract

The API accepts a JSON request containing authentication information together with the SQL clause components generated by the Analytics Chat.

A simplified request contract is shown below.

```
{
  "authorization":{
    "apiToken":"xxxxxxx",
    "apiPassword":"xxxxxxx"
  },
  "requestInfo":{
    "requestID":"12345",
    "operationType":"ANALYTICS_SQL_RETRIEVAL"
  },
  "sqlRequestInfo":{
    "selectClause":"CustomerName, TotalSales",
    "fromClause":"vwCustomerSales",
    "whereClause":"SalesYear=2025",
    "orderByClause":"TotalSales DESC",
    "limitClause":"20"
  }
}
```

The actual production request contains additional information and validation fields, however the overall structure remains the same.

Step 6 - Implement The Response Contract

The API returns a JSON response indicating the execution status together with the requested rows.

A simplified response contract is shown below.

```
{
  "status": "SUCCESS",
  "requestID": "12345",
  "rowCount": 2,
  "rows": [
    {
      "CustomerName": "ABC Manufacturing",
      "TotalSales": 125000
    },
    {
      "CustomerName": "XYZ Industries",
      "TotalSales": 98000
    }
  ]
}
```

The production response contains additional execution information including the executed SQL statement, status information, and diagnostic information when appropriate.

Step 7 - Test The API

Test the API using representative Analytics Chat requests.

Verify that authentication succeeds, SQL translation produces valid SQL for the selected database platform, the database connection is successful, the approved views return the expected data, and the JSON response conforms to the published response contract.

Correct any errors before making the Real-Time Analytics data source available for production use.

Supported Database Platforms

The sample Customer API includes database connection routines and SQL translation support for the following database platforms.

- MySQL / MariaDB
- Microsoft SQL Server
- Oracle
- PostgreSQL

Additional database platforms may be supported by extending the database connection and SQL translation routines.

Summary

A Real-Time Analytics implementation consists of creating secure database views, generating the Customer Analytics API, configuring a restricted read-only database connection, translating Analytics Chat SQL into the customer's database syntax, implementing the JSON request and response contracts, and validating the complete end-to-end process before deployment.

1000.000 - Security Management

10.000 - Introduction to Security Management

Screen | 2026-05-11 00:00:00 Intro Securty

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](#) 



Screen Name

Description

[Chat with Me](#) 

[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.

[+ Add](#)

View	Delete	Userid	LastName	FirstName	WorkType	SecLevel	Editor	LastName
 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	Rodríguez	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	LastName	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

 Corporate Intelligence System

Home Screen Help ?

Search Manual for Help

Chat with Me

Screen Name
SN_EmailConfig

Description
SN_EmailConfig

File

Chat With Me

Books Chapters

Screens Documents

Procedure Documents

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AI Control

Search Control

Utilities

Secure Email Configuration

Purpose: This screen manages the secure email configuration file used by system email routines.
Security: This is a restricted administrative screen and should only be used by authorized users.
Source File: Values are loaded from /secure/emailconfig.txt.
Save Action: Save validates the values, backs up the current file, writes the replacement file, and records a secure log entry.
Cancel Action: Cancel reloads the current secure file and discards unsaved screen changes.

Email Identity

Mailer phpmail	From Name Engineering AI Knowledge Systems
From Email author@prodretrieveaugmentaibook.com	Reply To Email author@prodretrieveaugmentaibook.com
Author Email	Admin Email author@prodretrieveaugmentaibook.com

Public Contact Addresses

Sales Email sales@prodretrieveaugmentaibook.com	Support Email support@prodretrieveaugmentaibook.com	Info Email info@prodretrieveaugmentaibook.com
Test Email	Bounce Email	

SMTP Settings

SMTP Host	SMTP Port 587	SMTP Secure tls
SMTP User	SMTP Password	

Save Cancel

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

Website Backup

Website backups can take several minutes to complete.
 When you request a backup, the system starts DBBackup.php in the background and returns this screen. You can leave this page and come back later.
 Use Find My Backups to locate completed backup ZIP files, download a backup, and then optionally delete the backup directory from the server.

[Backup Website](#) [Find My Backups](#) [Cancel](#)

Completed backups were found. Select Download for the backup you want.

Available Backups

Download	YYYYMMDD	File Name	Full Directory Path
Download Backup	20260427	ivanemos_AI_Demo_20260427_235732.zip	/home/ivanemos/prodretrieveaugmentaibook.com/backups/20260427/ivanemos_AI_Demo_20260427_235732
Download Backup	20260425	ivanemos_AI_Demo_20260425_002102.zip	/home/ivanemos/prodretrieveaugmentaibook.com/backups/20260425/ivanemos_AI_Demo_20260425_002102
Download Backup	20260412	ivanemos_AI_Demo_20260412_200754.zip	/home/ivanemos/prodretrieveaugmentaibook.com/backups/20260412/ivanemos_AI_Demo_20260412_200754
Download Backup	20260411	ivanemos_AI_Demo_20260411_193826.zip	/home/ivanemos/prodretrieveaugmentaibook.com/backups/20260411/ivanemos_AI_Demo_20260411_193826

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

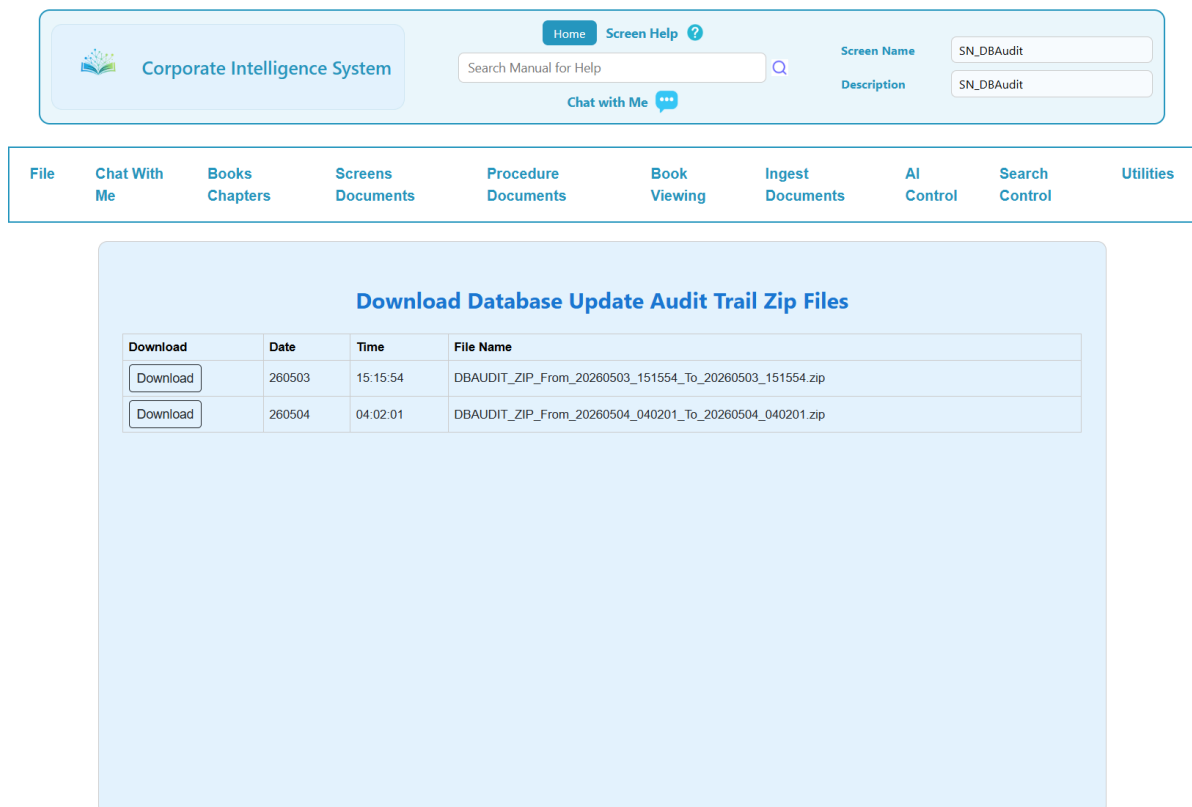
This screen is used to view and download archived database audit records that are generated by the system to track all database update activity performed by users.

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.

Required Configuration

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

Important Environment Setting

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.

Primary Database Settings

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.