

TRAINING MANUAL

Corporate Intelligence System

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10.000 - Introduction to the Corporate Intelligence System

10.000 - Purpose of This Training Manual

Screen | 2026-05-16 12:37:16 TM_C010_S010

010.000 Purpose of This Training Manual

Purpose

This Training Manual teaches users how to use the Corporate Intelligence System to search company knowledge, ask questions through the Chat AI Agent, create structured books and chapters, build documentation sections, load business documents, and maintain information that can be searched and used by Artificial Intelligence.

The manual is designed as a practical step by step guide for end users who want to convert documents, procedures, policies, and operational knowledge into a structured knowledge system that can be searched, viewed online, downloaded as manuals, and accessed through conversational AI.

The material is organized in the same way that knowledge is organized within the system itself. Chapters present major subject areas. Sections explain specific tasks. Screen images illustrate each step. This structure allows users to learn the platform while simultaneously seeing how books, chapters, and sections are created and managed.

This manual focuses on day to day activities performed by users. It explains how to search for information, use screen help, navigate the online manual, work with the Chat AI Agent, review chat history, analyze chat performance, create books and chapters, write sections and procedures, and load PDF, DOCX, RTF, spreadsheet, email, and other business documents.

Administrative topics such as security maintenance, synonym updates, scoring controls, API configuration, and system setup are intentionally excluded. The objective of this manual is to help users become productive as quickly as possible using the operational features of the platform.

By following the procedures in this manual, users will learn how to transform existing organizational information into searchable and intelligent knowledge that can improve training, support decision making, preserve institutional knowledge, and increase productivity throughout the organization.

Find. Understand. Apply. Your Knowledge:
Powered by Search. Enhanced by AI.

Search across all corporate knowledge...

Welcome
 Your corporate knowledge.
 Always at your fingertips.

SEARCH
 Find policies, procedures, screen help, documents and more in seconds.
 Start Searching

CHAT AI AGENT
 Ask questions. Get accurate, contextual answers from your knowledge.
 Start Chatting

BOOKS & MANUALS
 Explore online manuals organized by books, chapters and sections.
 View Manuals

Quick Access
 My Chat History Search Documents Online Manual Upload Document

ONE SYSTEM. ONE SOURCE. ONE TRUTH. ENDLESS VALUE.

POLICIES

PROCEDURES

KNOWLEDGE EMPOWERS PERFORMANCE

INSTANT SEARCH
 Find what you need in seconds

AI CHAT AGENT
 Get accurate answers from your knowledge

ORGANIZED MANUALS
 Books, chapters and sections made simple

SMART DOCUMENTS
 Upload, index and retrieve with ease

CONTINUOUS IMPROVEMENT
 Better knowledge.
 Better decisions.
 Better results.

YOUR KNOWLEDGE. OUR SYSTEM. BETTER TOGETHER.

IVAN RODRIGUEZ

Screen | 2026-05-16 12:37:16 TM_C010_S020

020.000 What the Corporate Intelligence System Does

Purpose

This section explains what the Corporate Intelligence System does and how it transforms ordinary business documents into searchable and intelligent organizational knowledge.

The Corporate Intelligence System is a unified platform that combines documentation management, structured books and chapters, intelligent search, conversational Artificial Intelligence, and online publishing into one integrated environment.

Most organizations already possess valuable information in the form of policies, procedures, manuals, spreadsheets, reports, contracts, training guides, technical documentation, and operational notes. Although this information exists, it is often difficult to locate when employees need it.

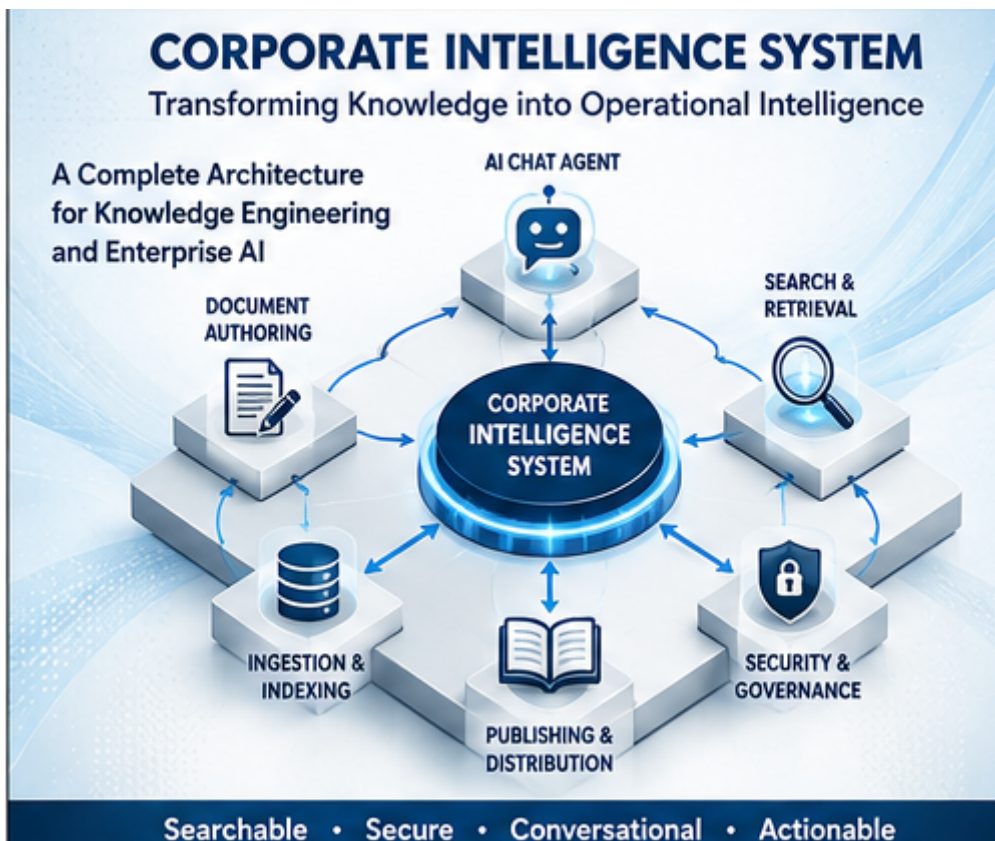
The Corporate Intelligence System solves this problem by organizing information into structured books, chapters, and sections. Existing documents can be loaded into the platform, divided into searchable chunks, indexed for rapid retrieval, and prepared for use by the Chat AI Agent.

The global search engine allows users to locate information by entering keywords and phrases. The Chat AI Agent allows users to ask questions in plain language and receive responses based on the organization's own documents and knowledge.

The same information can be viewed online as manuals, downloaded as PDF books, searched through the inverted index, and used as the knowledge foundation for Artificial Intelligence responses.

This approach converts static files into active business intelligence. Instead of searching through folders or interrupting coworkers, employees can obtain accurate and consistent answers directly from the system.

The result is improved productivity, faster onboarding, stronger training, preservation of institutional knowledge, and better operational decision making throughout the organization.



30.000 - Basic User Workflow

Screen | 2026-05-16 12:37:16 TM_C010_S030

030.000 Basic User Workflow

Purpose

This section provides a high level overview of how users typically work with the Corporate Intelligence System from the moment they log in until they obtain answers and create new knowledge.

Most users begin by logging into the system and reviewing the Main Menu. From there they can search for information using the global search box, open the online manual, review screen help, or ask questions through the Chat AI Agent.

When users need to create new knowledge, they can build books and chapters, write documentation sections, create procedures, and load business documents such as PDF, DOCX, RTF, spreadsheets, emails, and knowledge notes.

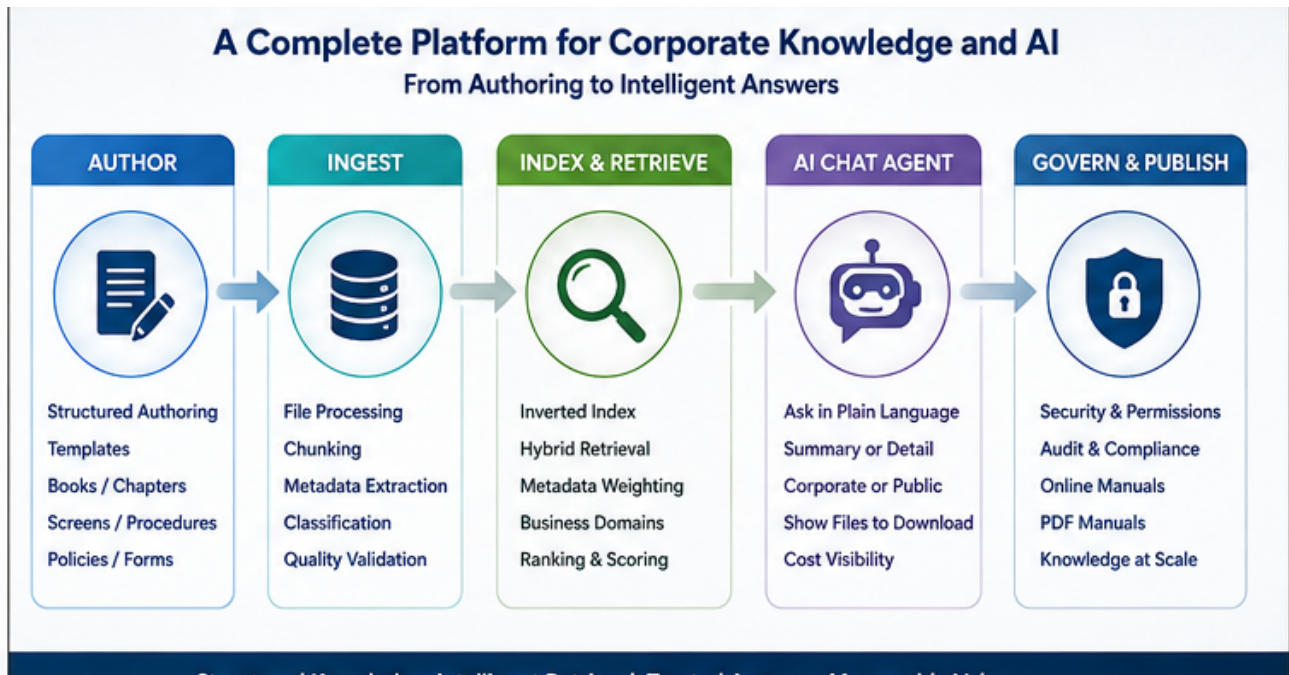
After information is saved, it can be chunked, indexed, and vectored so that it becomes available to both the inverted index search engine and the Chat AI Agent.

Users can then ask questions in natural language and receive responses based on the documents and knowledge that have been loaded into the system.

Chat History allows users to return to previous conversations, while Chat Performance Reports help explain why an answer was strong or weak and what changes may improve future results.

As more books, procedures, and documents are added, the system becomes increasingly valuable because organizational knowledge is preserved and made available to everyone who needs it.

The overall workflow transforms ordinary business information into a searchable and conversational knowledge platform that supports training, operations, and decision making.



20.000 - Logging In and Navigating the System

10.000 - Logging In

Screen | 2026-05-16 12:37:16 TM_C020_S010

010.000 Logging In

Purpose

This section explains how to log into the Corporate Intelligence System and begin a secure working session.

Logging in identifies you to the system and determines which books, documents, search functions, and Chat AI features you are authorized to use.

To begin, open your web browser and enter the web address provided by your administrator. The Login screen will appear automatically.

Enter your assigned User ID in the User ID field.

Enter your password in the Password field.

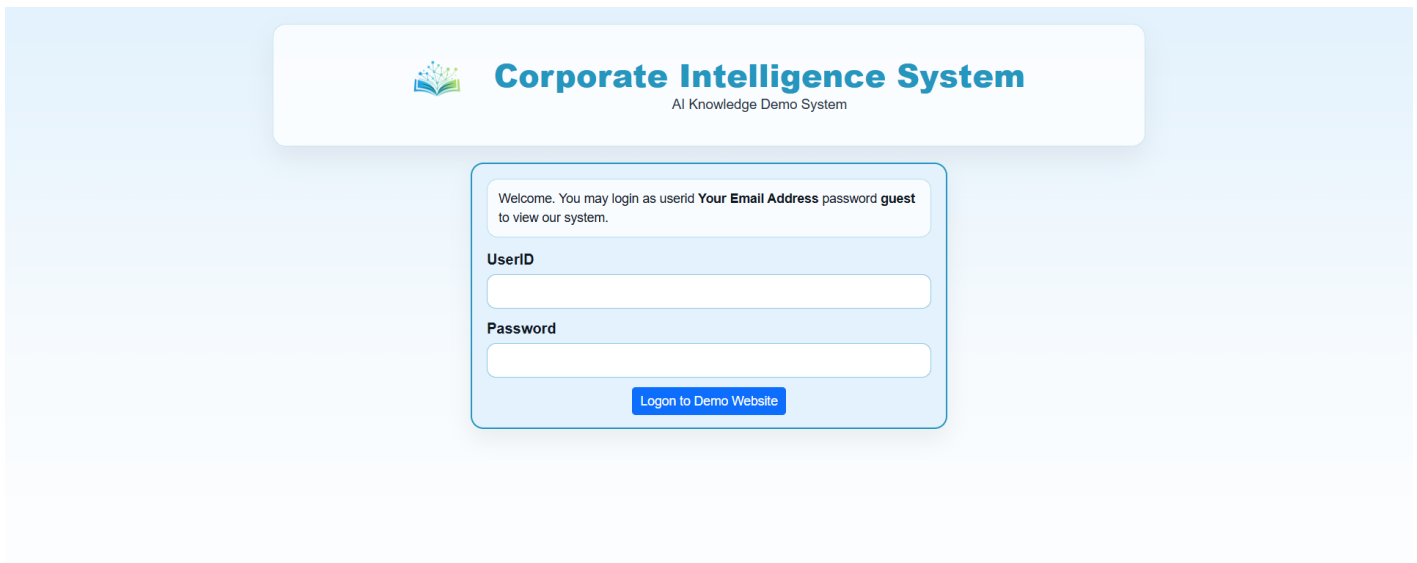
Select the Login button to validate your credentials and open the Main Menu.

If you entered the correct User ID and Password, the system will create a secure session and display the System Main Menu.

If the login is unsuccessful, verify that both values were entered correctly and try again. Check for typing errors, extra spaces, or incorrect capitalization.

If you continue to receive an error message, contact your system administrator to confirm that your account is active and that your password has not expired.

Always keep your password confidential and use the Logoff option when leaving a shared workstation.



The screenshot displays the login interface for the Corporate Intelligence System. At the top, a white header bar contains a logo of an open book with green leaves and the text "Corporate Intelligence System" in blue, with "AI Knowledge Demo System" in smaller text below it. Below the header is a light blue rounded rectangle containing the login form. Inside the form, a white box at the top says "Welcome. You may login as userid **Your Email Address** password **guest** to view our system." Below this are two input fields: "UserID" and "Password". At the bottom of the form is a blue button labeled "Logon to Demo Website".

20.000 - Understanding the Main Menu

Screen | 2026-05-16 12:37:16 TM_C020_S020

020.000 Understanding the Main Menu

Purpose

This section explains how to use the System Main Menu and how the menu serves as the central navigation point for the Corporate Intelligence System.

After a successful login, the Main Menu appears automatically and provides access to the major functions of the platform.

The menu is organized into logical groups that guide users to the tools they need to search information, work with books and chapters, create documentation, load business documents, and interact with the Chat AI Agent.

The Chat With Me menu contains the conversational Artificial Intelligence tools, Chat History, and related analysis features.

The Books Chapters menu is used to create and maintain books and chapter structures.

The Screens Documents menu is used to create documentation sections and screen help content.

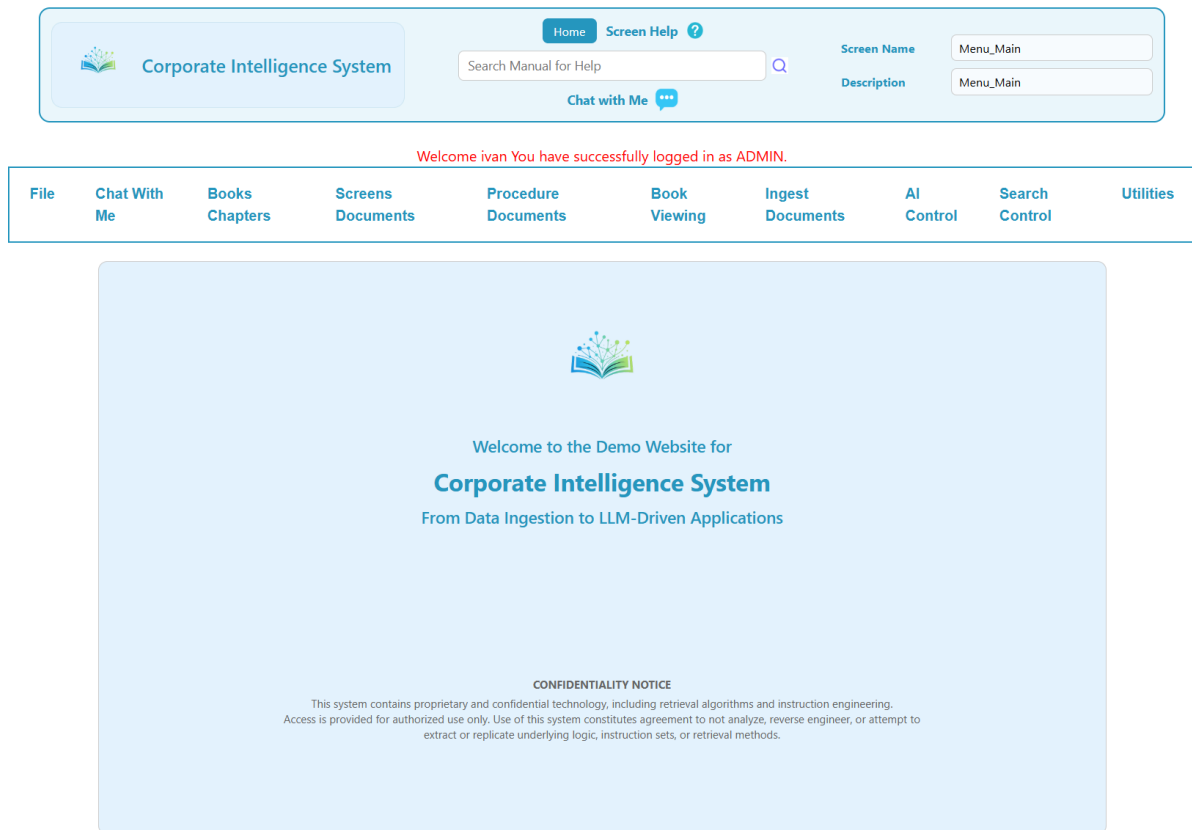
The Procedure Documents menu is used to create step by step procedures.

The Book Viewing menu allows users to view manuals online and download completed books.

The Ingest Documents menu contains tools for loading PDF, DOCX, RTF, spreadsheets, emails, and other knowledge sources.

The Search menu and the global search box provide immediate access to indexed corporate knowledge.

The Main Menu is the starting point for nearly every activity described in this Training Manual.



30.000 - Returning Home and Ending Your Session

Screen | 2026-05-16 12:37:16 TM_C020_S030

030.000 Returning Home and Ending Your Session

Purpose

This section explains how to return to the Main Menu and how to end your working session safely when you have completed your work.

The Home button appears on most screens and returns you to the System Main Menu without closing your session.

Use the Home button whenever you want to move to another part of the system or begin a new task.

Your current work should always be saved before selecting Home to avoid losing unsaved changes.

The Logoff option ends your secure session and returns you to the Login screen.

Use Logoff whenever you are finished working or when you are leaving your computer unattended.

Logging off helps protect books, documents, chat conversations, and other information from unauthorized access.

If you are working on a shared computer, always log off before leaving your workstation.

If your session remains inactive for an extended period, the system may automatically end your session and require you to log in again.

Using Home and Logoff properly helps maintain both security and efficient navigation throughout the Corporate Intelligence System.



Corporate Intelligence System

Home

Screen Help

?

Search Manual for Help

Chat with Me

Screen Name

Menu_Main

Description

Menu_Main

Welcome ivan You have successfully logged in as ADMIN.

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

30.000 - Using the Global Search Box

10.000 - What the Top Search Box Does

Screen | 2026-05-16 12:37:16 TM_C030_S010

010.000 What the Top Search Box Does

Purpose

This section explains the purpose of the Global Search Box located at the top of the screen.

The Global Search Box allows you to search the entire Corporate Intelligence System from any screen.

You can enter words or phrases related to policies, procedures, manuals, documents, help topics, and other stored knowledge.

The system searches the indexed content and returns the most relevant matches.

Search results may include Book Sections, Procedures, Help Screens, Knowledge Notes, and other documents that contain the requested information.

The Global Search Box is designed to provide immediate access to business knowledge without requiring you to navigate through menus.

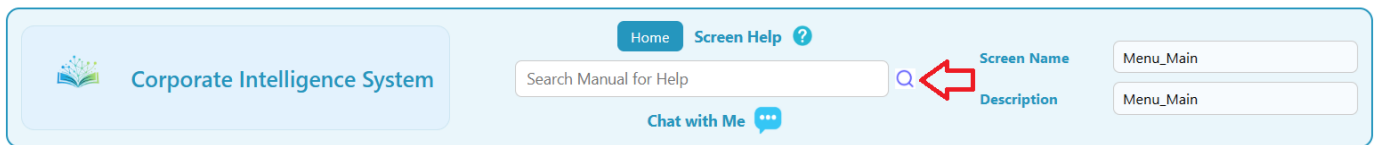
This feature is especially useful when you know what information you need but do not know where it is stored.

The Search system uses advanced indexing techniques to locate matching content quickly and accurately.

Results are typically ranked so that the most relevant information appears first.

The Global Search Box transforms the Corporate Intelligence System into an enterprise wide knowledge retrieval platform.

Understanding this search box is essential because it provides one of the fastest ways to locate information anywhere in the system.



20.000 - When to Use Search Instead of Chat

Screen | 2026-05-16 12:37:16 TM_C030_S020

020.000 When to Use Search Instead of Chat

Purpose

This section explains when to use the global search box and when to use the Chat AI Agent.

Both tools help you locate information, but they are designed for different types of questions.

Use the search box when you know specific words, phrases, report names, form names, or policy titles.

Search is ideal when you want to locate an exact document, procedure, manual section, or downloadable file.

Search is also useful when you want to review multiple results and choose the one that best matches your needs.

Use the Chat AI Agent when you want an explanation, summary, comparison, or step by step guidance.

The Chat AI Agent allows you to ask questions in plain language and receive responses based on the knowledge stored in the Corporate Intelligence System.

For example, if you know the phrase vacation policy, use Search to find the exact document.

If you want to ask, How do employees request time off, use the Chat AI Agent to receive a summarized explanation.

In general, if you know a few important words, use Search. If you want the system to explain the answer, use Chat.



SEARCH

Find Exact Information



Find Exact Documents

Locate specific manuals, policies, procedures, reports, and forms.



Locate Forms and Policies

Find the exact document or file you are looking for.



Review Ranked Results

Results are ranked by relevance so you can choose the best match.



CHAT AI AGENT

Get Answers and Explanations



Ask Questions in Plain Language

Type your question naturally just like you would ask a person.



Receive Explanations and Summaries

Get clear, accurate answers based on your organization's knowledge.



Get Step by Step Guidance

Receive procedures, how-to guidance, and recommended actions.

VS.



If you know the words, use SEARCH.

If you want an explanation, use CHAT.



30.000 - Reading Search Results

Screen | 2026-05-16 12:37:16 TM_C030_S030

030.000 Reading Search Results

Purpose

This section explains how to read and interpret the results returned by the global search engine.

After entering one or more keywords, the system displays a ranked list of matching books, chapters, procedures, screen documents, and uploaded files.

The highest scoring results appear first because they are considered the most relevant to your request.

Each result typically includes the title of the document or section, the book and chapter where it belongs, a brief description, and a calculated relevance score.

Some results may include downloadable files such as PDF, DOCX, RTF, spreadsheets, or other source documents.

Select the title or View option to open the full document, procedure, or manual section.

If several results are returned, review the descriptions and choose the item that most closely matches the information you need.

If the expected result does not appear, try using different keywords, shorter phrases, or more specific business terms.

Search results improve over time as additional books, procedures, and documents are added to the Corporate Intelligence System.

Understanding how to read search results will help you locate information more quickly and accurately.


Corporate Intelligence System

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

[Chat with Me](#)

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

7 results in 64 ms for 'Book' — page 1 of 1

Manage Book Titles
[View](#)
[SCR]
score 413.94

Document Name: SN_Book | DocID: 8 | Book: Operating Manual | Chapter: Managing Books and Chapters
Managing Books and Chapters > 100.000 Managing Book Titles
Last Indexed: 2026-03-02 23:43:01

How to Create and Manage Books
[View](#)
[PROC]
score 325.24

Document Name: Creating Book Titles | DocID: 3 | Book: Operating Manual | Chapter: How to Create and Manage Books
How to Create and Manage Books > 0.000 How to Create and Manage Books
Last Indexed: 2026-03-02 22:44:26

Overview of Managing Books Chapters Documents and
[View](#)
[PROC]
score 266.11

Document Name: A Overview of Books Chapters and Pages | DocID: 2 | Book: Operating Manual | Chapter: Overview of Managing Books Chapters Documents and
Overview of Managing Books Chapters Documents and > 0.000 Overview of Managing Books Chapters Documents and
Last Indexed: 2026-03-02 22:17:44

Intro to Books Chapters Procedures and Screens Doc
[View](#)
[SCR]
score 162.62

Document Name: BookIntro | DocID: 7 | Book: Operating Manual | Chapter: Introduction
Introduction > 1.000 Intro To Books Chapters Procedures Documents
This informational document is located within the Operating Manual book and can be accessed through the Screen Documents menu under the assigned chapter and section number. Key fields include Book Name Chapter Number Chapter Name Section Nu...
Last Indexed: 2026-03-02 23:29:55

How to Create Manage Chapters
[View](#)
[PROC]
score 12.37

Document Name: Creating Chapters | DocID: 4 | Book: Operating Manual | Chapter: How to Create Manage Chapters
How to Create Manage Chapters > 0.000 How to Create Manage Chapters
Last Indexed: 2026-03-02 22:48:10

How to Create Procedures
[View](#)
[PROC]
score 11.13

Document Name: Creating Procedures | DocID: 5 | Book: Operating Manual | Chapter: How to Create Procedures
How to Create Procedures > 0.000 How to Create Procedures
Last Indexed: 2026-03-02 22:51:57

How to Create Screens and Documents
[View](#)
[PROC]
score 8.66

Document Name: Create Screen Documents | DocID: 6 | Book: Operating Manual | Chapter: How to Create Screens and Documents
How to Create Screens and Documents > 0.000 How to Create Screens and Documents
Last Indexed: 2026-03-02 22:56:21

40.000 - Downloading Documents from Search Results

Screen | 2026-05-16 12:37:16 TM_C030_S040

040.000 Downloading Documents from Search Results

Purpose

This section explains how to open and download documents that are referenced in search results.

Many search results are linked to source files such as PDF, DOCX, RTF, spreadsheets, presentations, and other business documents.

When a downloadable file is available, the search result will display a link, button, or icon that allows you to open the document directly.

Select the file name or Download option to open the document in your browser or save it to your computer.

Downloaded files preserve the original source information and can be reviewed in their native format.

This feature is especially useful when you need to read the complete manual, contract, policy, report, or presentation that was used to support a search result or Chat AI response.

Some results may also provide online viewing in addition to file downloads.

If a document does not open, verify that your browser allows downloads and that the appropriate software is installed to view the file type.

Access to downloadable documents may be limited by your security permissions and the audience assigned to the source material.

Downloading original documents allows you to review the full supporting material whenever more detail is required.

7 results in 64 ms for 'Book' — page 1 of 1

Manage Book Titles  [View](#) [SCR] score 413.94

Document Name: SN_Book | DocID: 8 | Book: Operating Manual | Chapter: Managing Books and Chapters

Managing Books and Chapters > 100,000 Managing Book Titles

Last indexed: 2026-03-02 23:43:01

How to Create and Manage Books  [View](#) [PROC] score 325.24

Document Name: Creating Book Titles | DocID: 3 | Book: Operating Manual | Chapter: How to Create and Manage Books

How to Create and Manage Books > 0.000 How to Create and Manage Books

Last indexed: 2026-03-02 22:44:26

40.000 - Using Screen Help

10.000 - What Screen Help Is

Screen | 2026-05-16 12:37:16 TM_C040_S010

010.000 What Screen Help Is

Purpose

This section explains how Screen Help provides immediate guidance for the program you are currently using.

Nearly every major screen in the Corporate Intelligence System includes a Help option that opens detailed instructions for that specific screen.

Screen Help is context sensitive, which means the information displayed is directly related to the program you are viewing at that moment.

Instead of searching through manuals or asking another employee for assistance, you can press Help and receive explanations of the screen purpose, fields, buttons, and common procedures.

Screen Help is written using the same structured book, chapter, and section framework used throughout the Corporate Intelligence System.

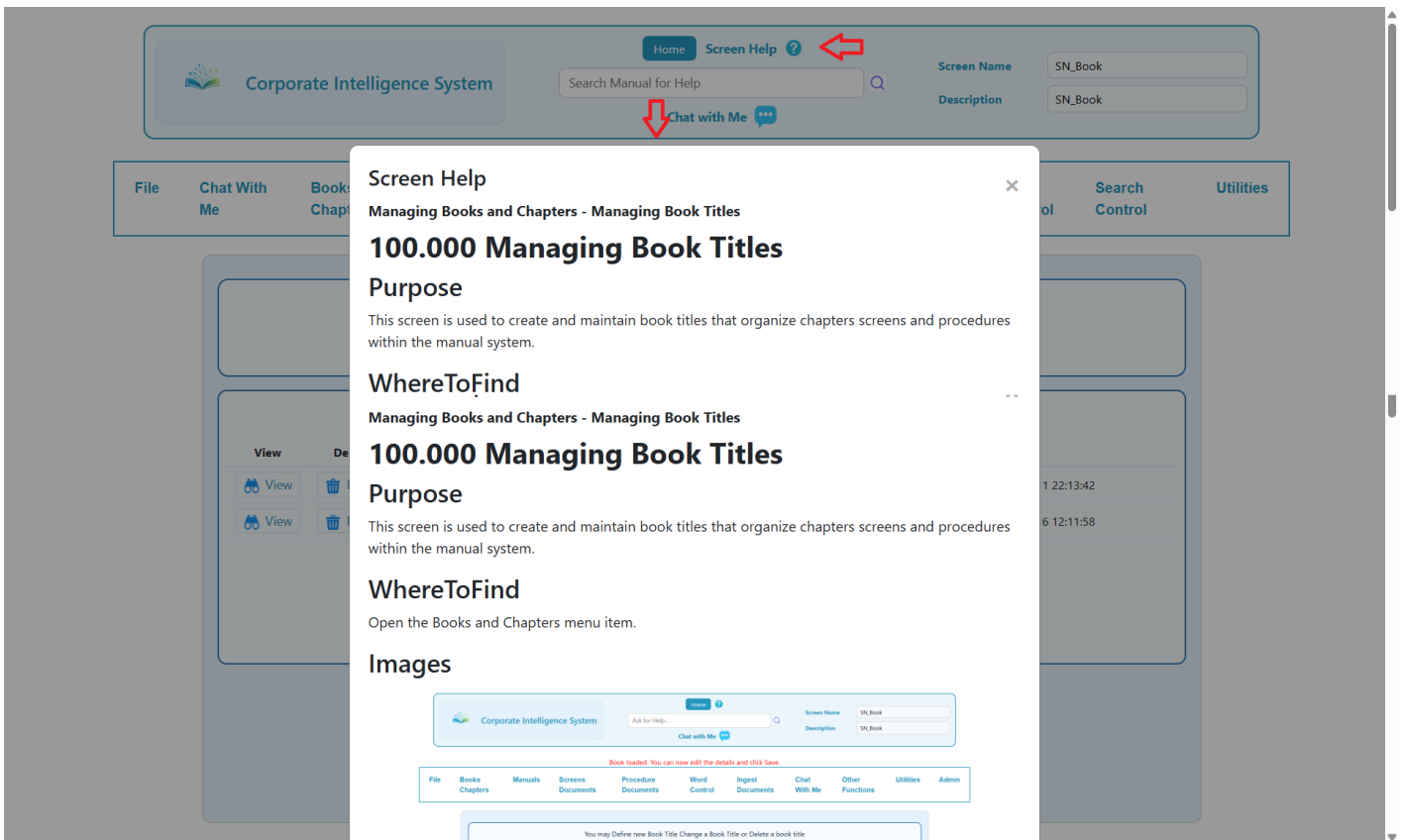
The information may include images, examples, best practices, and troubleshooting tips that help you understand what the screen does and how to use it effectively.

Because Screen Help is stored as searchable knowledge, the same content can also appear in the online manual, keyword search results, and Chat AI responses.

This approach ensures that one well written explanation can support documentation, training, search, and Artificial Intelligence simultaneously.

Whenever you are uncertain about a field, button, or process, Screen Help should be your first source of guidance.

Using Screen Help regularly will help you learn the system more quickly and work with greater confidence.



20.000 - Opening Help for the Screen You Are On

Screen | 2026-05-16 12:37:16 TM_C040_S020

020.000 Opening Help for the Screen You Are On

Purpose

This section explains the step by step process for opening Screen Help while working anywhere in the Corporate Intelligence System.

Begin by navigating to the screen where you need assistance.

Locate the Help button, help icon, or help link that appears near the top of the page.

Select the Help option to open the detailed instructions associated with the current screen.

The help information may appear in a separate window, a popup dialog, or an overlay displayed on top of the current screen.

Read the purpose, field descriptions, examples, and troubleshooting guidance provided in the help document.

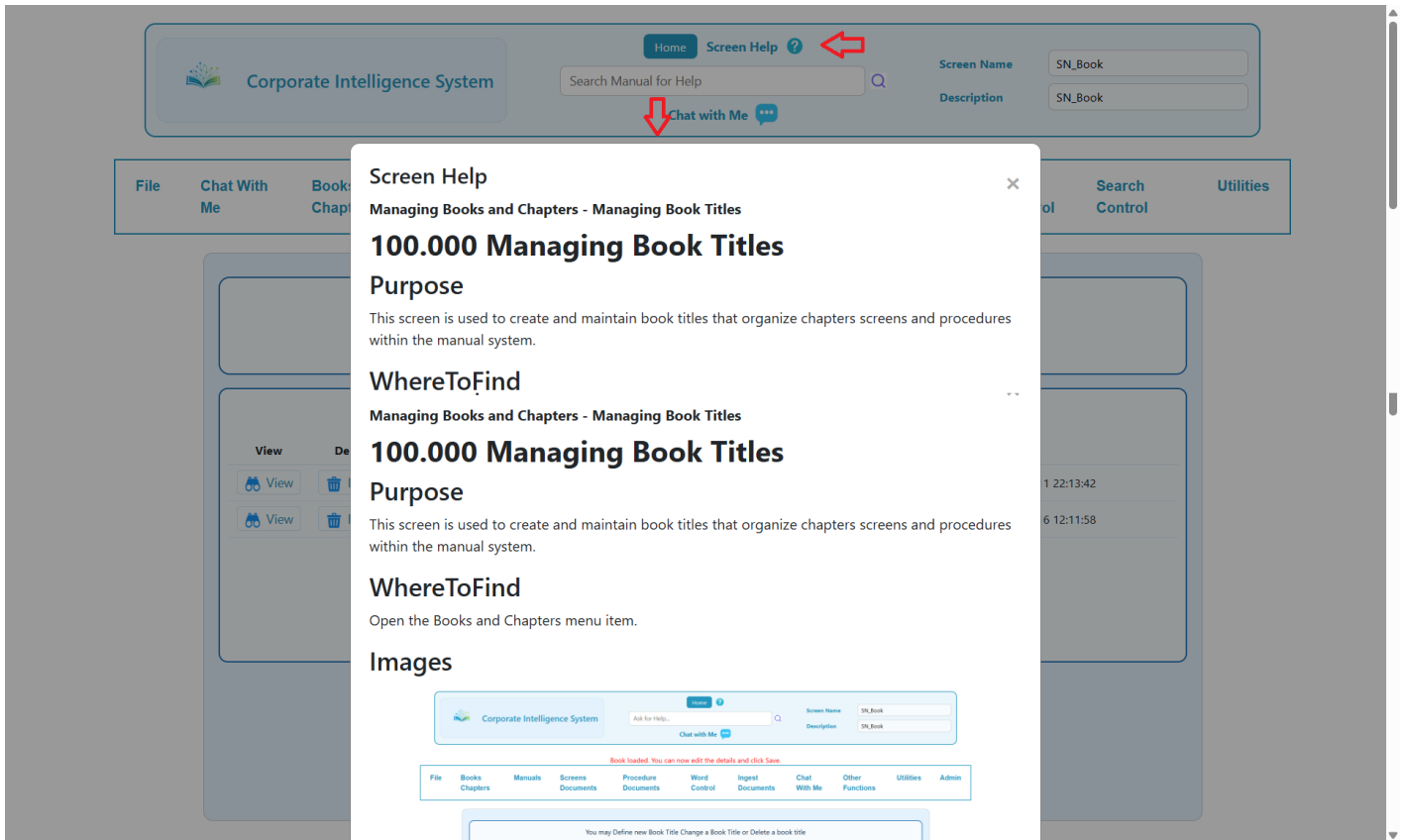
Use the images and explanations to understand the screen before entering or changing information.

When you have finished reviewing the instructions, close the help window to return to your work.

You can reopen Screen Help at any time whenever additional guidance is needed.

Using Screen Help while working allows you to learn each program in context and reduces the need to

search elsewhere for answers.



30.000 - Using Screen Help While Working

Screen | 2026-05-16 12:37:16 TM_C040_S030

030.000 Using Screen Help While Working

Purpose

This section explains how to use Screen Help as a practical reference while entering data and performing daily tasks.

Screen Help is designed to be consulted whenever you are uncertain about a field, button, menu option, or processing step.

You do not need to leave the screen or interrupt your work to obtain guidance.

Open the help window, review the relevant explanation, and return immediately to the task you are performing.

Many users keep the help window open in a separate browser tab or window while entering information for the first time.

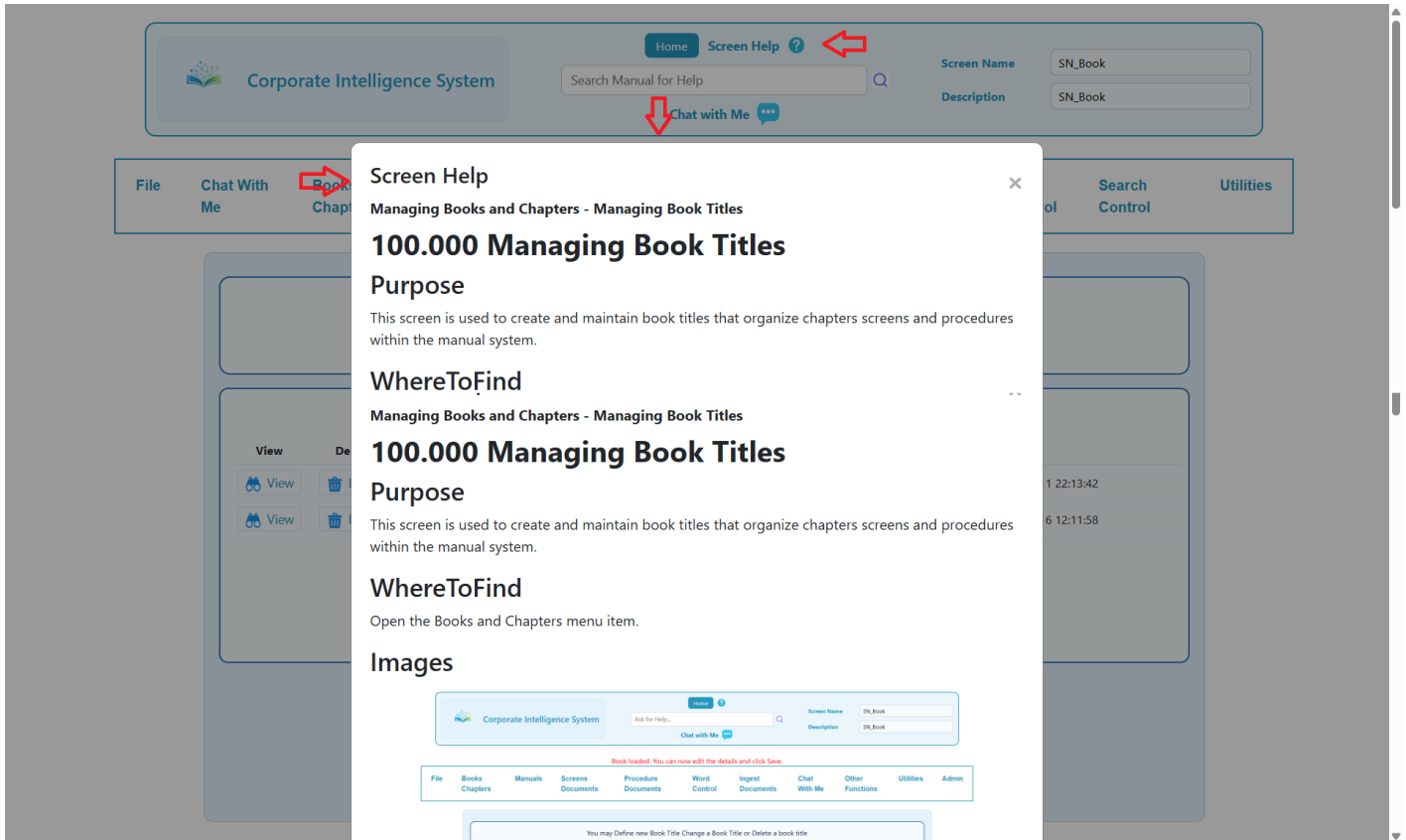
This approach allows you to follow instructions step by step and compare your screen to the illustrated examples.

As you gain experience, you may use Screen Help only for unfamiliar fields, rarely used functions, or troubleshooting situations.

Because Screen Help is maintained in the same knowledge system used for search and Artificial Intelligence, improvements to the documentation benefit all users immediately.

Whenever procedures change or new features are added, updated Screen Help becomes available without requiring a separate printed manual.

Using Screen Help as part of your daily workflow is one of the fastest ways to become proficient with the Corporate Intelligence System.



50.000 - Viewing the Online Manual

10.000 - What the Online Manual Is

Screen | 2026-05-16 12:37:16 TM_C050_S010

010.000 What the Online Manual Is

Purpose

This section explains how the Online Manual provides immediate access to the books, chapters, and sections stored in the Corporate Intelligence System.

The Online Manual displays documentation directly in your web browser using the same content that is maintained in books, chapters, screen documents, and procedures.

Instead of opening separate files or searching through printed binders, users can navigate structured manuals online and access information instantly.

Each book contains chapters that organize major topics, and each chapter contains sections and procedures that explain specific subjects and tasks.

The same documentation can support online viewing, keyword search, Chat AI responses, and downloadable PDF books.

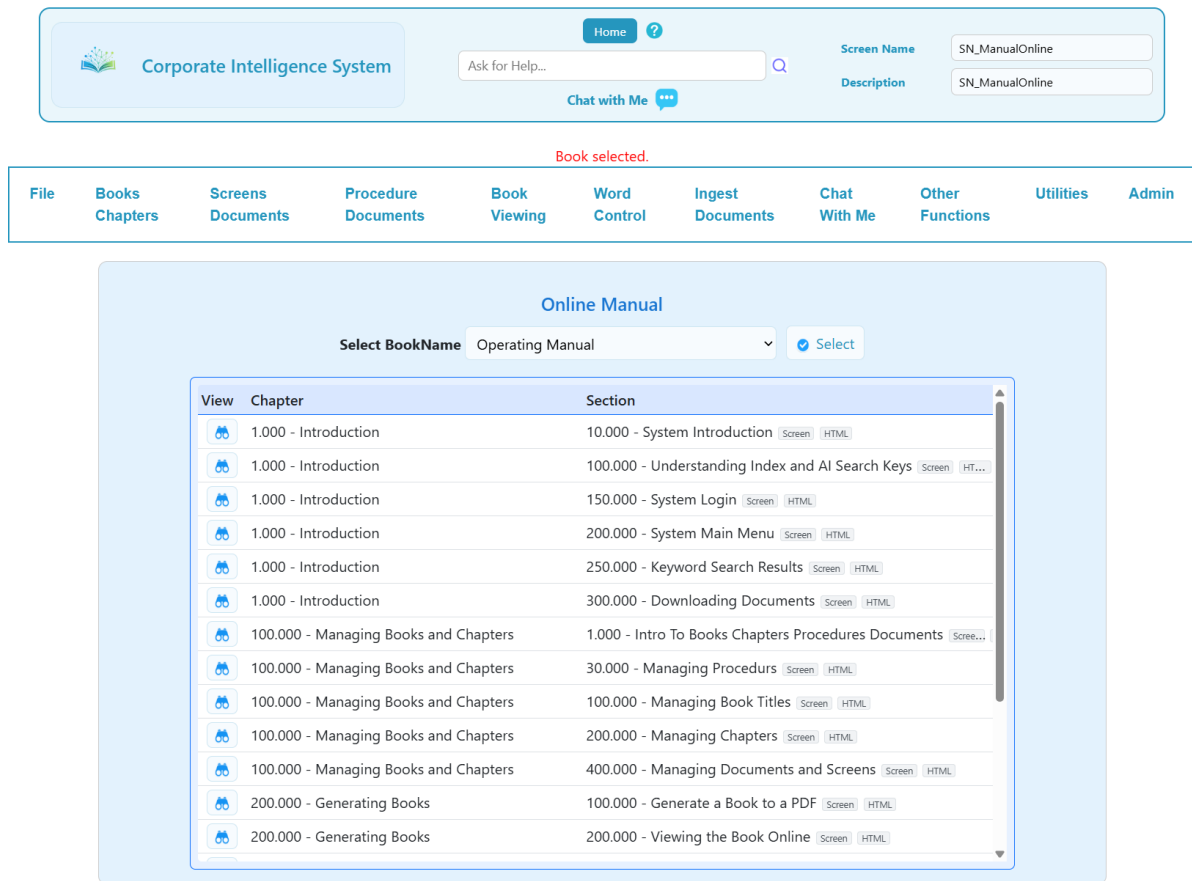
This means that one well maintained source of information can serve multiple purposes throughout the organization.

When a section is updated, the changes become available immediately in the Online Manual and in all other knowledge delivery tools that use the same content.

The Online Manual is especially useful for training, policy review, operational guidance, and day to day reference.

Because the information is presented in a structured format, users can move quickly from broad topics to detailed explanations.

The Online Manual transforms documentation from static files into a living knowledge resource that is always available through the Corporate Intelligence System.



20.000 - Opening a Book Online

Screen | 2026-05-16 12:37:16 TM_C050_S020

020.000 Opening a Book Online

Purpose

This section explains how to open any book in the Corporate Intelligence System and read it directly in your web browser.

The Online Manual feature allows you to view books, chapters, sections, procedures, and images without downloading a separate file.

Begin by selecting the View Books menu from the Main Menu and choosing the View Online Book option.

The View Online Book screen will display a list of available books.

Select the book you want to review from the Book Name dropdown list.

Press the View Online Book button to open the selected manual.

The system will generate the book dynamically and display it in your browser.

The manual will include the table of contents, chapter headings, section titles, procedures, and illustrations that have been assigned to the selected book.

You can scroll through the manual, use your browser search feature, and follow links to move through the content.

This feature provides immediate access to the most current version of the documentation stored in the Corporate Intelligence System.

Corporate Intelligence System

Home ?

Ask for Help...

Chat with Me

Screen Name
SN_ManualOnline

Description
SN_ManualOnline

Book selected.

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

Online Manual

Select BookName
Operating Manual
Select

View	Chapter	Section
	1.000 - Introduction	10.000 - System Introduction Screen HTML
	1.000 - Introduction	100.000 - Understanding Index and AI Search Keys Screen HTML
	1.000 - Introduction	150.000 - System Login Screen HTML
	1.000 - Introduction	200.000 - System Main Menu Screen HTML
	1.000 - Introduction	250.000 - Keyword Search Results Screen HTML
	1.000 - Introduction	300.000 - Downloading Documents Screen HTML
	100.000 - Managing Books and Chapters	1.000 - Intro To Books Chapters Procedures Documents Screen HTML
	100.000 - Managing Books and Chapters	30.000 - Managing Procedures Screen HTML
	100.000 - Managing Books and Chapters	100.000 - Managing Book Titles Screen HTML
	100.000 - Managing Books and Chapters	200.000 - Managing Chapters Screen HTML
	100.000 - Managing Books and Chapters	400.000 - Managing Documents and Screens Screen HTML
	200.000 - Generating Books	100.000 - Generate a Book to a PDF Screen HTML
	200.000 - Generating Books	200.000 - Viewing the Book Online Screen HTML

30.000 - Navigating Chapters and Sections

Screen | 2026-05-16 12:37:16 TM_C050_S030

030.000 Navigating Chapters and Sections

Purpose

This section explains how to move through the Online Manual once a book has been opened in your browser.

Each book begins with a table of contents that lists the chapters and sections included in the manual.

Chapter headings organize major subject areas, while sections focus on specific topics and procedures.

Select a chapter or section link in the table of contents to move directly to that part of the manual.

You can also scroll through the manual sequentially to read the content in order.

Each section includes a numbered heading, explanatory text, and, when appropriate, supporting illustrations.

Because books are organized into a structured hierarchy, users can quickly move from broad topics to detailed instructions.

Your browser search feature can be used to locate words or phrases within the currently displayed manual.

As new chapters and sections are added, they automatically appear in the table of contents according to their assigned numbers.

This structured navigation makes large manuals easy to browse, search, and understand.

 Corporate Intelligence System

[Home](#) ?



Screen Name
SN_ManualOnlineView

Description
SN_ManualOnlineView

[Chat with Me](#)

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

Operating Manual
1.000 - Introduction
100.000 - Understanding Index and AI Search Keys
Screen: IntroKeys

100.000 Understanding Index and AI Search Keys

Purpose

This section explains how structured fields such as MetaData Keywords DocType Audience BookName Chapter Section and document text work together to build a powerful search index and AI knowledge base that produces accurate plain English answers.

WhyThisMatters

The quality of AI responses depends directly on how well information is organized described and indexed.

When documentation is structured correctly the AI can locate relevant content quickly rank it properly and generate reliable answers.

HowIndexingWorksInSimpleTerms

The system reads stored documents procedures screens emails notes uploaded PDF files and DOCX files and breaks the text into searchable words called tokens.

Each token is stored in an inverted index which is a structure that maps words to the documents where they appear.

When a user asks a question the system looks up those words in the index finds matching documents calculates a relevance score

Mode: HTML - Updated: 0000-00-00 00:00:00

60.000 - Using the Chat AI Agent

10.000 - What the Chat AI Agent Does

Screen | 2026-05-16 12:37:16 TM_C060_S010

010.000 What the Chat AI Agent Does

Purpose

This section explains how the Chat AI Agent allows you to ask questions in plain language and receive answers based on the knowledge stored in the Corporate Intelligence System.

The Chat AI Agent combines document retrieval, keyword search, metadata, and Artificial Intelligence to deliver responses grounded in your organization's own books, procedures, manuals, and uploaded documents.

Unlike general public Artificial Intelligence tools, the Chat AI Agent is designed to answer questions using information that has been deliberately loaded and organized within your environment.

You can ask operational questions, request explanations, compare procedures, summarize policies, and obtain step by step guidance.

The system interprets your request, retrieves the most relevant supporting material, and prepares a focused response based on authorized content.

The quality of the answer depends on the quality and completeness of the documentation that has been written and loaded into the system.

Because the same knowledge also supports manuals and keyword search, improvements made to documentation benefit all users immediately.

The Chat AI Agent reduces the time spent searching, waiting for answers, and interrupting coworkers.

As more information is added, the Chat AI Agent becomes increasingly valuable as a source of trusted organizational knowledge.

The result is a conversational interface that makes corporate information easier to access, understand, and apply.

Corporate Intelligence System

Home Screen Help ?

Search Manual for Help

Screen Name Chat

Description SN_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: Employment Issues

\$0.3504

New Chat

Rename Chat

Optional Business Domain for Search:

Unassigned

Selected Business Domain:

Summary: Off

Copy Box: Off

Search Mode: DB Search Only

Show Files: Off

My Chats:

Chat History

Employment Issues

Message 3 - 04/25/2026 8:11 PM

User Request

Can i use my overtime and comp time or administrative leave

DB Stream Response

Based on the internal HR policy text provided:

1. Overtime / comp time

- Yes, the policy does allow overtime to be taken as banked time off rather than immediate pay.

- Overtime hours are banked at 1.5x.

- That time off must be taken at a time mutually agreeable to the ED/CEO and the employee.

- If the banked time is not used within 6 months, the employer will pay it out at 1.5x the employee's regular wage.

- Overtime must be authorized in advance, except in emergencies.

Public Stream Response

In general:

Type a command or request...

Send

☐ Summary ☐ Copy Box ☒ DB Search Only ☐ DB and Public Search ☐ Use Domain ☐ Show Files

Select Internal Command to Execute: Select Command Enter Line #: Enter Line # Command

20.000 - Asking Good Questions

Screen | 2026-05-16 12:37:16 TM_C060_S020

020.000 Asking Good Questions

Purpose

This section explains how to ask questions that produce clear and useful responses from the Chat AI Agent.

The quality of the answer depends heavily on the clarity and specificity of the question you provide.

Questions that include meaningful business terms, document names, process names, and operational context generally produce better results than short or vague requests.

Instead of asking a broad question such as Tell me about benefits, ask a more specific question such as How does an employee request family medical leave and what documentation is required.

When appropriate, include department names, policy titles, report names, or other terms that are likely to appear in your organization's documentation.

If the first response is incomplete, ask a follow up question that adds more detail or clarifies the specific information you need.

You may also request summaries, comparisons, examples, or step by step instructions.

Clear questions help the system retrieve more relevant supporting material and prepare more focused responses.

Asking good questions is a skill that improves with practice and becomes one of the most effective ways to use the Corporate Intelligence System.

The more precisely you describe what you need, the more useful the response is likely to be.

Corporate Intelligence System

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

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](#)

Active Chat: **Employment Issues**
\$0.3504

New Chat

Rename Chat

Optional Business Domain for Search:

Selected Business Domain:

Summary: Off

Copy Box: Off

Search Mode: DB Search Only

Show Files: Off

My Chats:

Chat History

Employment Issues

Message 3 - 04/25/2026 8:11 PM

User Request

Can i use my overtime and comp time or administrative leave

DB Stream Response

Based on the internal HR policy text provided:

1. Overtime / comp time

- Yes, the policy does allow overtime to be taken as banked time off rather than immediate pay.
- Overtime hours are banked at 1.5x.
- That time off must be taken at a time mutually agreeable to the ED/CEO and the employee.
- If the banked time is not used within 6 months, the employer will pay it out at 1.5x the employee's regular wage.
- Overtime must be authorized in advance, except in emergencies.

2. Leave / administrative leave

Public Stream Response

In general:

Can i use my overtime and comp time as Administrative Leave

☐ Summary
☐ Copy Box
☒ DB Search Only
☐ DB and Public Search
☐ Use Domain
☐ Show Files

Select Internal Command to Execute:
Enter Line #:

30.000 - Understanding Chat Responses

Screen | 2026-05-16 12:37:16 TM_C060_S030

030.000 Understanding Chat Responses

Purpose

This section explains how to read and interpret the responses returned by the Chat AI Agent.

After you submit a question, the system displays a written response based on the most relevant books, procedures, manuals, and uploaded documents available to the platform.

The response area contains the primary answer prepared from the supporting knowledge selected by the retrieval system.

Depending on the configuration, additional information may be displayed, including supporting files, selected source material, token usage, processing statistics, and related messages.

The answer may include explanations, summaries, comparisons, recommendations, and step by step guidance.

Because responses are grounded in the knowledge stored within the Corporate Intelligence System, the accuracy and completeness of the answer depend on the quality of the underlying documentation.

If the response is incomplete or unclear, ask follow up questions to request more detail or clarification.

You may also use the Show Files option to download documents that were used to support the answer.

Reviewing both the response and the supporting materials helps you understand how the conclusion was reached.

Learning to interpret chat responses will allow you to use the Chat AI Agent more effectively and with greater confidence.

Corporate Intelligence System

Home Screen Help ?

Search Manual for Help

Screen Name Chat

Description SN_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: Test Chat Thread

\$1.2045

New Chat

Rename Chat

Optional Business Domain for Search: Human Resources

Selected Business Domain: HUMAN_RESOURCES

Summary: Off

Copy Box: Off

Search Mode: DB and Public Search

Show Files: On

Supporting Files: HR-Guide_Policy-and-Procedure-Template.pdf

My Chats: Chat History Test Chat Thread

Message 3 - 05/12/2026 4:38 PM

User Request

Can i use my overtime and comp time for administrative leave

DB Stream Response

Based on the internal HR chunks provided, I cannot confirm that you can use overtime or comp time for administrative leave.

What the internal material does say is:

1. The overtime/lieu time section says the Foundation may grant time off for hours worked beyond the standard work week.

2. The leave section lists emergency leave, personal leave, and medical/disability leave, and those leave types are described separately.

3. The leave material shown does not say that banked overtime, lieu time, or comp time can be applied to administrative leave.

Public Stream Response

In general, overtime, comp time, lieu time, and administrative leave are usually separate categories.

Can i use my overtime and comp time for administrative leave

Send

☐ Summary
☐ Copy Box
☐ DB Search Only
☒ DB and Public Search
☒ Use Domain
☒ Show Files

Select Internal Command to Execute: Select Command Enter Line #: Enter Line # Command

40.000 - Refining a Question

Screen | 2026-05-16 12:37:16 TM_C060_S040

040.000 Refining a Question

Purpose

This section explains how to improve a question when the first response does not fully answer your request.

Artificial Intelligence works best when the question clearly describes the business subject, the process involved, and the type of answer you want.

If the initial response is too broad, too short, or missing important details, ask a follow up question that provides more specific information.

You may identify the department involved, the policy name, the report title, the exact process, or the outcome you are trying to achieve.

You can also request that the answer be expanded, summarized, compared, or rewritten as step by step instructions.

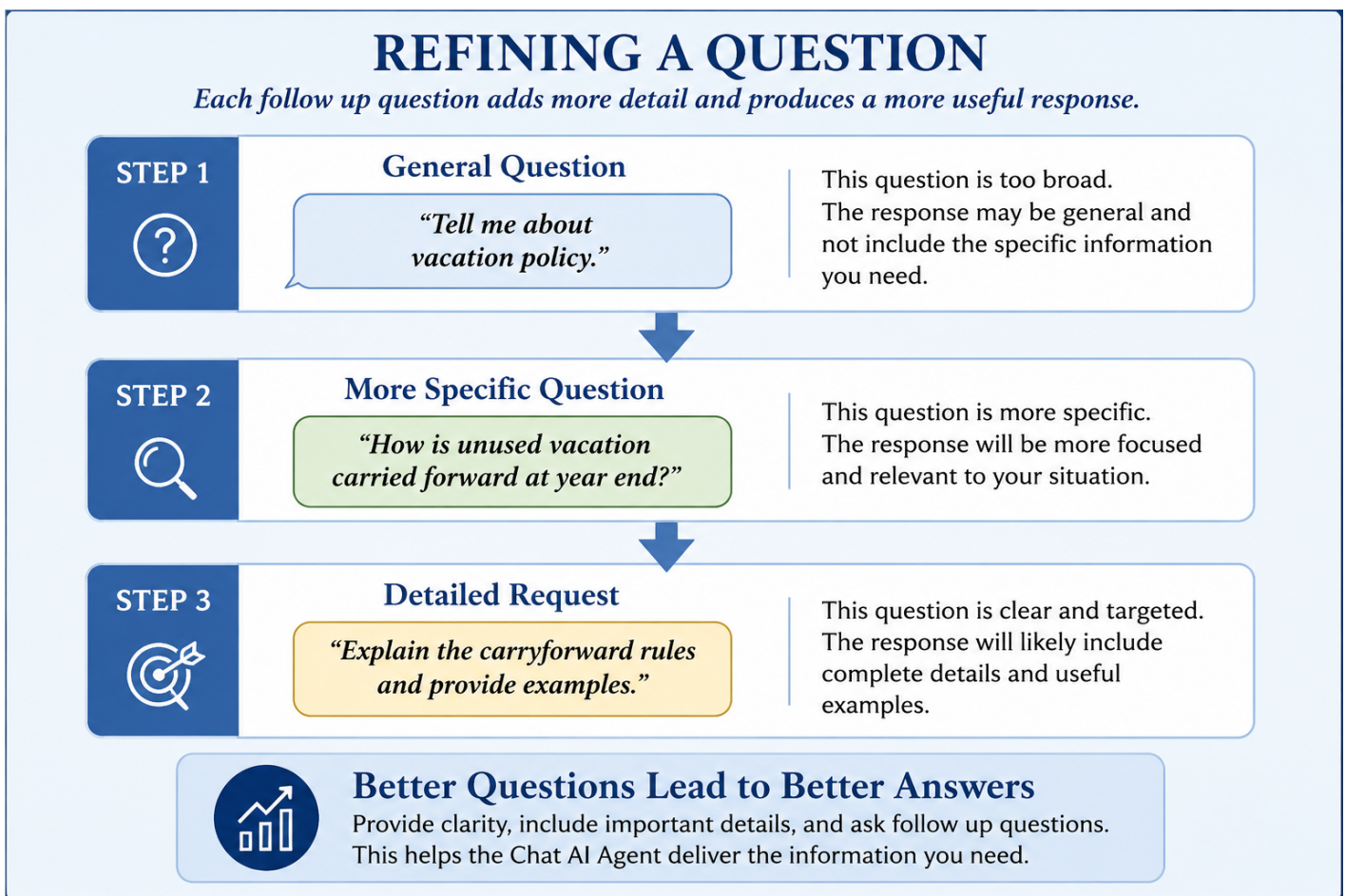
Each additional question builds on the previous conversation and helps the system better understand your needs.

For example, after receiving a general explanation of vacation policy, you might ask how unused vacation is carried forward at year end.

Refining a question is often the fastest way to obtain a more precise and useful response.

Over time, users become skilled at guiding the conversation toward the exact information they need.

The most effective conversations are those in which the user and the Chat AI Agent work together to clarify the request and improve the answer.



70.000 - Using Chat History

10.000 - What Chat History Is

Screen | 2026-05-16 14:39:45 TM_C070_S010

010.000 What Chat History Is

Purpose

This section explains how Chat History stores and organizes your prior conversations with the Chat AI Agent.

Each time you begin a new conversation, the system creates a separate chat thread with its own title, messages, summaries, costs, and performance statistics.

Chat History allows you to reopen previous discussions, continue unresolved work, and review answers that were generated earlier.

Each conversation preserves the sequence of questions and responses, making it possible to return to complex topics without starting over.

Chat History is especially valuable for research, documentation projects, troubleshooting, and long running business discussions.

Saved conversations can be revisited to locate prior explanations, compare answers, and continue building knowledge over time.

Depending on your permissions, Chat History may also display message counts, token usage, processing costs, and summary information.

The ability to preserve and revisit conversations transforms the Chat AI Agent into a practical working environment rather than a temporary question and answer tool.

As your use of the system grows, Chat History becomes an increasingly important personal knowledge resource.

Understanding Chat History will help you organize your work and make better use of previous conversations.

Corporate Intelligence System

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

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](#)

Chat History

Report has been processed. Press Download PDF.

Chat Name

Select User ID

Search Archive ☐
Any Text

From Date
To Date

Actions	UserID	ConversationID	ChatName	StartDate	LastDate	Input Tokens	Output Tokens	Total Tokens
Select Delete Archive Run Report	ivan	1	Employment Issues	04/20/2026	04/25/2026	114709	4244	118953

20.000 - Finding a Prior Chat

Screen | 2026-05-16 14:39:45 TM_C070_S020

020.000 Finding a Prior Chat Purpose

This section explains how to locate a previous conversation in Chat History.

Open the Chat History screen from the Chat With Me menu.

The screen displays prior chat conversations that are available to your user account.

Review the chat list to identify the conversation you want to open.

Use the visible information such as chat title, date, message count, or summary details to determine which conversation matches your need.

If the screen includes search or filter fields, enter part of the chat title or subject and select Search.

When the matching conversation appears, select the appropriate View, Open, or Continue option to review the conversation.

If you do not see the expected chat, clear the search text and search again with broader words.

Older conversations may be easier to find when the chat title clearly describes the work that was performed.

Finding prior chats allows users to return to earlier research, continue unfinished work, and reuse

answers that were already created.

Corporate Intelligence System

Home

Screen Help ?

Search Manual for Help

Q

Chat with Me

Screen Name

ChatHistory

Description

ChatHistory

File

Chat With Me

Books Chapters

Screens Documents

Procedure Documents

Book Viewing

Ingest Documents

AI Control

Search Control

Utilities

Chat History

Report has been processed. Press Download PDF.

Download PDF

Chat Name

Add

Select User ID

ivan

Save

Search Archive

Any Text

Cancel

From Date

To Date

Search

Actions	UserID	ConversationID	ChatName	StartDate	EndDate	Input Tokens	Output Tokens	Total Tokens
SelectDeleteArchiveRun Report	ivan	1	Employment Issues	04/20/2026	04/25/2026	114709	4244	118953

30.000 - Reopening or Reviewing a Conversation

Screen | 2026-05-16 14:39:45 TM_C070_S030

030.000 Reopening or Reviewing a Conversation Purpose

This section explains how to reopen or review a prior Chat AI Agent conversation from Chat History.

Open the Chat History screen from the Chat With Me menu.

Locate the conversation you want to review.

Select the View, Open, Continue, or similar action shown for that conversation.

The system will return you to the saved chat thread so you can review the questions, answers, and supporting information from the earlier discussion.

Use the message navigation controls to move through the conversation if the thread contains many messages.

Review the earlier questions to understand the context of the answer before relying on a response.

If the conversation is still useful, you may continue asking follow up questions in the same thread.

If the topic has changed significantly, it may be better to start a new chat so the new discussion remains organized.

Reopening prior conversations helps preserve research, training work, troubleshooting steps, and decisions made during earlier sessions.

Corporate Intelligence System

HomeScreen Help?

Search Manual for Help

Chat with Me

Screen Name

ChatHistory

Description

ChatHistory

File

Chat With Me

Books Chapters

Screens Documents

Procedure Documents

Book Viewing

Ingest Documents

AI Control

Search Control

Utilities

Chat History

Report has been processed. Press Download PDF.

Download PDF

Chat Name

Add

Select User ID

ivan

Save

Search Archive

Any Text

Cancel

From Date

To Date

Search

Actions

UserID

ConversationID

ChatName

StartDate

LastDate

Input Tokens

Output Tokens

Total Tokens

Select

Delete

Archive

Run Report

ivan

1

Employment Issues

04/20/2026

04/25/2026

114709

4244

118953

40.000 - Cleaning Up Unneeded Chats

Screen | 2026-05-16 14:39:45 TM_C070_S040

040.000 Cleaning Up Unneeded Chats

Purpose

This section explains how to organize Chat History by archiving or deleting conversations that are no longer needed.

Over time, Chat History may contain many conversations covering research, troubleshooting, documentation, and training activities.

Removing or archiving older conversations makes it easier to locate the discussions that remain important.

Use the Archive option to remove a conversation from the active list while preserving it for future reference.

Use the Delete option when the conversation is no longer needed and should be permanently removed.

Before deleting a conversation, confirm that the information is no longer required.

If the conversation contains important research or decisions, consider retaining it or exporting the information before deletion.

Archived conversations can usually be restored or reviewed later depending on system configuration.

Maintaining an organized Chat History improves productivity and makes prior work easier to locate.

Regular cleanup helps keep your conversational workspace focused on current and valuable discussions.

Corporate Intelligence System

Home

Screen Help ?

Search Manual for Help

Q

Chat with Me

Screen Name

ChatHistory

Description

ChatHistory

File

Chat With Me

Books Chapters

Screens Documents

Procedure Documents

Book Viewing

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AI Control

Search Control

Utilities

Chat History

Report has been processed. Press Download PDF.

Download PDF

Chat Name

Add

Select User ID

ivan

Save

Search Archive

Any Text

Cancel

From Date

To Date

Search

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

37

80.000 - Analyzing Chat Performance

10.000 - Why Chat Performance Matters

Screen | 2026-05-16 14:39:45 TM_C080_S010

010.000 Why Chat Performance Matters

Purpose

This section explains why Chat Performance Reports are valuable for understanding how effectively the Chat AI Agent answered your questions.

Although the Chat AI Agent may appear to respond instantly, a substantial amount of processing occurs behind the scenes to retrieve supporting information and prepare the final answer.

The Chat Performance Report reveals the major stages of this process and shows how much time was spent in each stage.

Users can see how long the system spent retrieving vectors, expanding keywords, searching documents, selecting chunks, and generating the final response.

The report may also display token usage, API costs, and other diagnostic information related to the conversation.

This information helps explain why one response was excellent while another was weaker or slower than expected.

Performance analysis is especially useful when you are learning how to ask better questions and how to improve the quality of your documentation.

If a report shows that few supporting chunks were selected, the underlying documents may need stronger descriptions, keywords, or more complete content.

By understanding the report, users gain insight into how the Corporate Intelligence System transforms questions into grounded answers.

Chat Performance Reports turn the Artificial Intelligence process into a transparent and understandable business tool.

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

20.000 - Running a Chat Performance Report

Screen | 2026-05-16 14:39:45 TM_C080_S020

020.000 Running a Chat Performance Report

Purpose

This section explains how to generate a Chat Performance Report for a prior conversation.

Open the Chat Performance Evaluator from the Chat With Me menu.

Select the conversation you want to analyze.

Choose the desired report level or diagnostic mode if multiple options are available.

Press the Generate Report button to create the performance analysis.

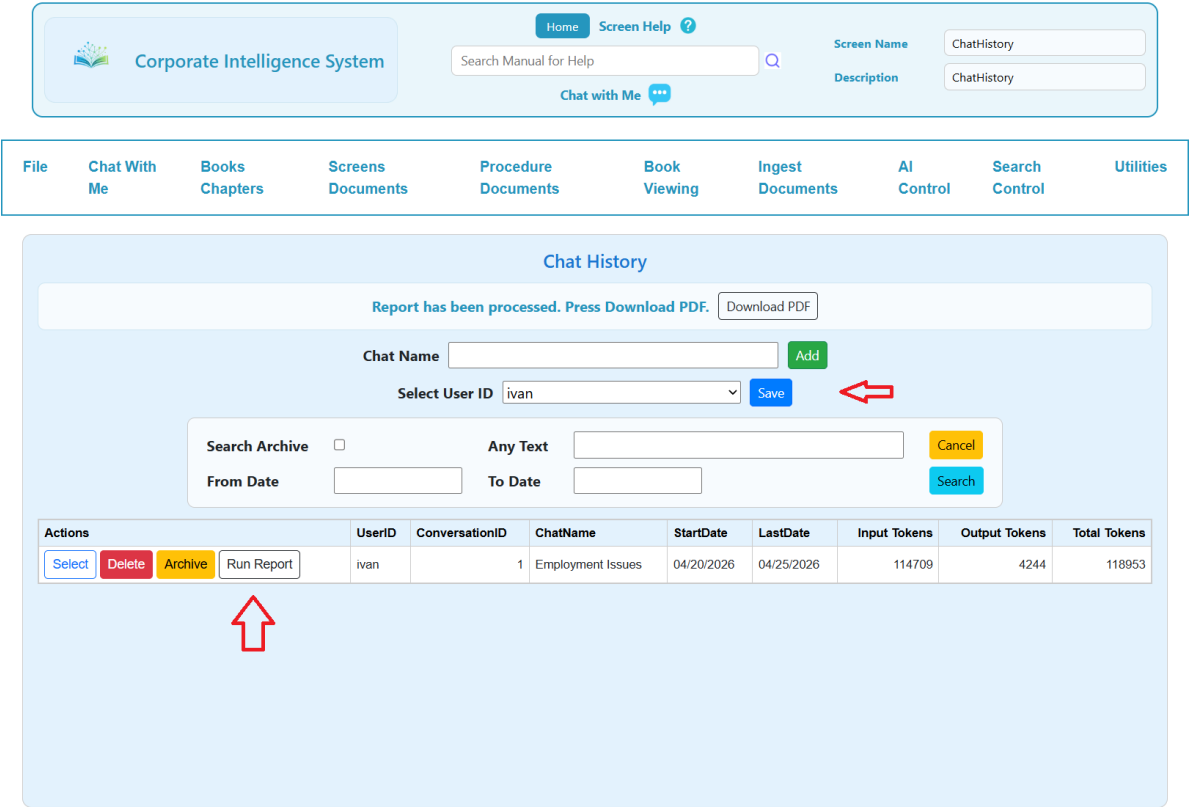
The system will gather information about messages, summaries, documents, chunks, keywords, vectors, token usage, and processing times.

The report is generated as a detailed PDF that can be viewed online or downloaded for later review.

Performance reports are especially useful when comparing different questions or evaluating how well the system used the available knowledge.

By running the report, users gain visibility into the internal processing that produced the final answer.

This report transforms the Chat AI Agent from a black box into a transparent and measurable business tool.



30.000 - Reading the Report as a User

Screen | 2026-05-16 14:39:45 TM_C080_S030

030.000 Reading the Report as a User

Purpose

This section explains how to read the user conversation report generated from Chat History.

The user conversation report is designed to help you review what was asked, what information was returned from the system, and what final answer was shown to the user.

Each item in the report is organized by message number so you can follow the conversation in the same order that it occurred.

The question section shows the exact question or request entered by the user.

The database response section shows the response information stored internally by the system for that message.

The public response section shows the final response that was presented to the user in the Chat AI Agent screen.

When reviewing the report, begin with the message number and then read the user question before reviewing the database response and public response.

If the public response does not fully answer the question, compare it to the original question to determine whether the request was too broad, unclear, or missing important details.

If the database response appears incomplete, the supporting documents may need clearer descriptions, stronger content, or more complete source information.

This report helps users understand the relationship between the question that was asked and the answer that was delivered.

Reading the report carefully can help users improve future questions and recognize when additional documents or better source content may be needed.

40.000 - Improving Future Questions

Screen | 2026-05-16 14:39:45 TM_C080_S040

040.000 Improving Future Questions

Purpose

This section explains how to use the Chat Performance Evaluator and conversation reports to ask better questions in the future.

Each report provides valuable insight into how the system interpreted your request and constructed the final response.

By reviewing your original question together with the database response and public response, you can determine whether the request was sufficiently clear and specific.

If the answer is too broad, revise the question to include additional business terms, document names, process names, or other relevant context.

If important details are missing, ask a follow up question that focuses on the exact information you need.

Performance reports may also reveal that the supporting documents are incomplete or lack meaningful descriptions and keywords.

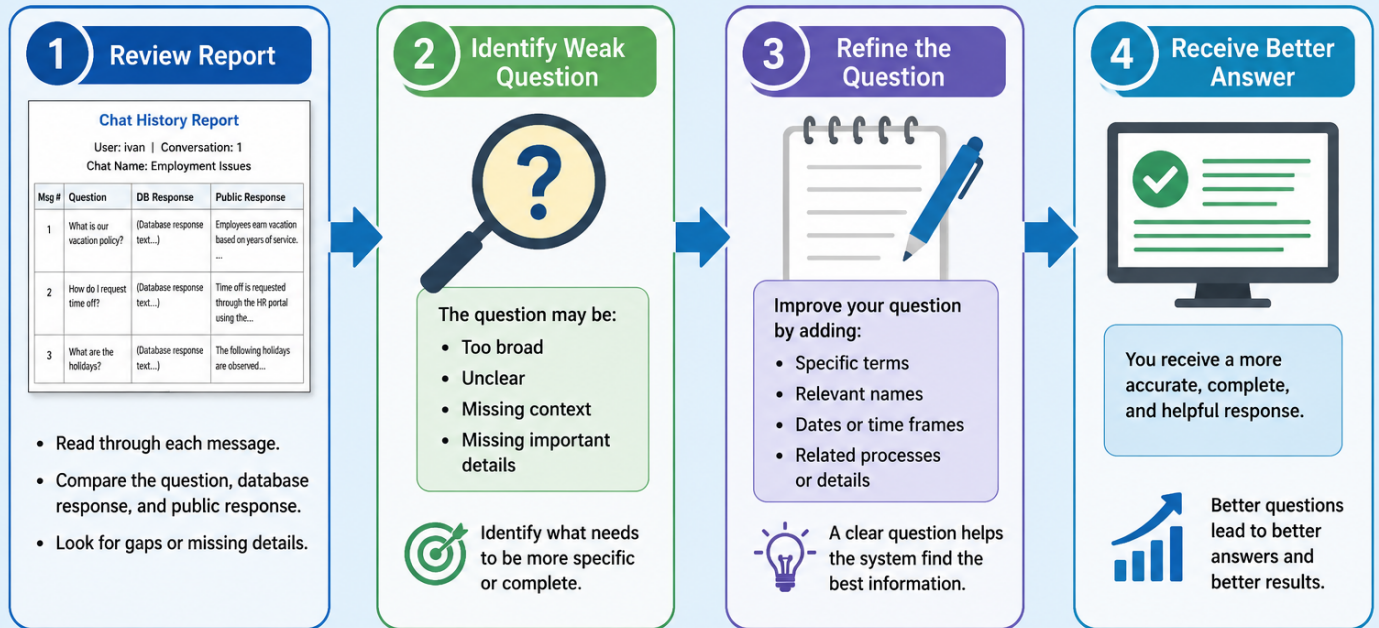
In these situations, improving the underlying documentation often produces better answers than repeatedly rephrasing the same question.

Over time, users develop a better understanding of how the Chat AI Agent interprets requests and selects supporting information.

This experience leads to stronger questions, more accurate responses, and greater confidence in the system.

The most effective users treat every conversation as an opportunity to improve both their questioning techniques and the quality of the knowledge stored in the Corporate Intelligence System.

Improving Future Questions



Better Analysis Leads to Better Questions and Better Answers

90.000 - Understanding Books Chapters and Sections

10.000 - How the Documentation Structure Works

Screen | 2026-05-16 14:39:45 TM_C090_S010

010.000 How the Documentation Structure Works

Purpose

This section explains the fundamental structure used to organize all manuals in the Corporate Intelligence System.

Every manual is organized into three primary levels: Books, Chapters, and Sections.

A Book represents the complete manual, such as the Training Manual, Operating Manual, Human Resources Manual, or Information Technology Policies Manual.

Each Book is divided into Chapters, which group related topics into major subject areas.

Each Chapter is divided into Sections, which contain the detailed instructional content presented to the user.

Sections are stored as Screen Documents or Procedures and may include text, images, diagrams, and supporting examples.

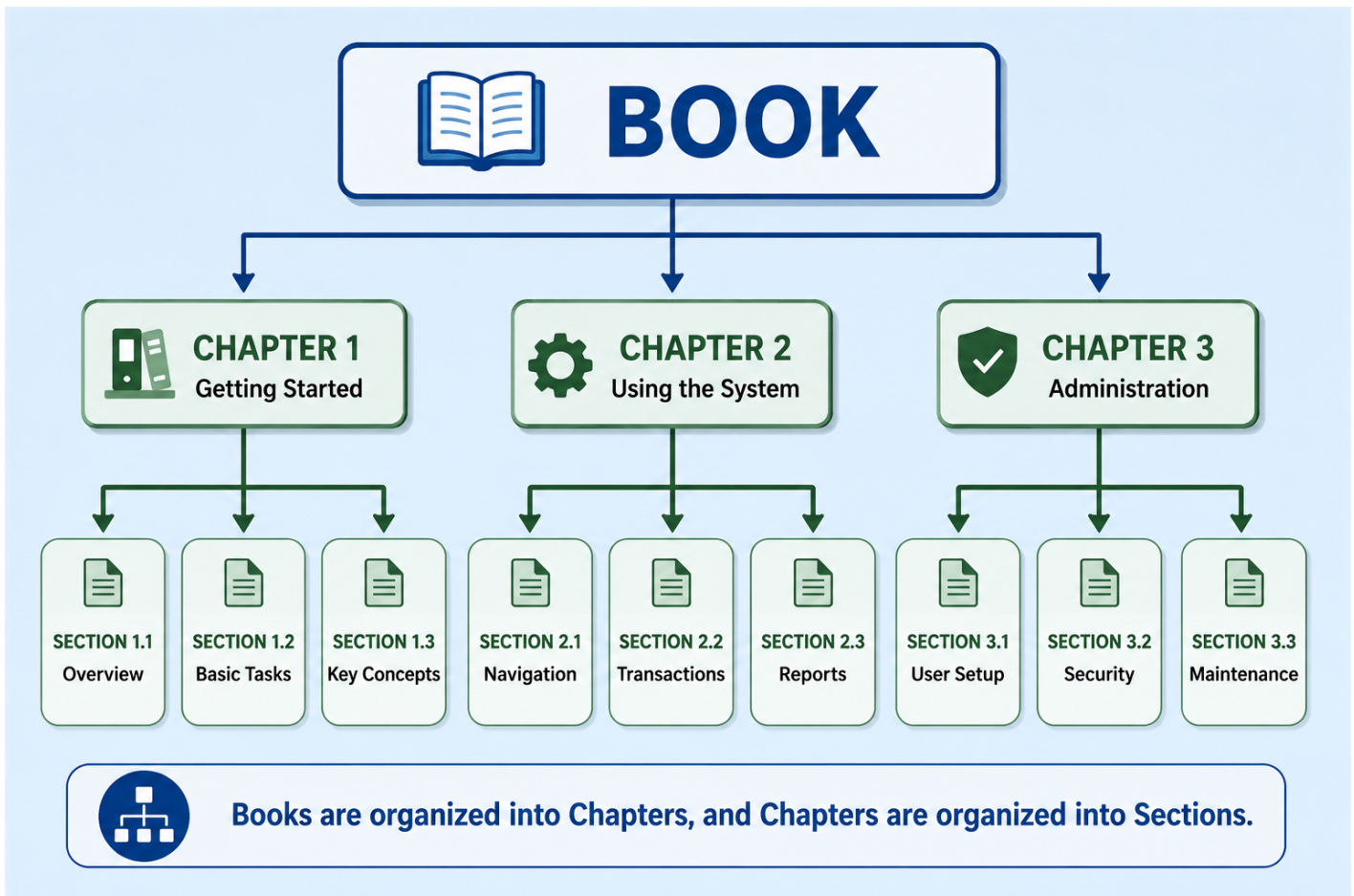
This hierarchical structure allows very large manuals to remain organized, searchable, and easy to maintain.

The same structure is used to generate printed manuals, online manuals, keyword search results, and Chat AI Agent responses.

When a Section is updated, the change immediately becomes available throughout the entire system.

Books provide the overall container, Chapters provide logical organization, and Sections provide the detailed knowledge.

Understanding this structure is essential because it forms the foundation for documentation, search, and Artificial Intelligence retrieval.



20.000 - Why Chapter Numbers Matter

Screen | 2026-05-16 14:39:45 TM_C090_S020

020.000 Why Chapter Numbers Matter

Purpose

This section explains why chapter numbers are important when organizing a book in the Corporate Intelligence System.

Chapter numbers control the order in which chapters appear in the online manual, printed manual, table of contents, and generated PDF book.

The system sorts chapters by their assigned chapter number, not by the date they were created.

Using a structured numbering pattern keeps the book organized and allows new chapters to be inserted later without renumbering the entire manual.

For example, chapter numbers such as 010.000, 020.000, and 030.000 leave room for future chapters to be added between existing chapters when needed.

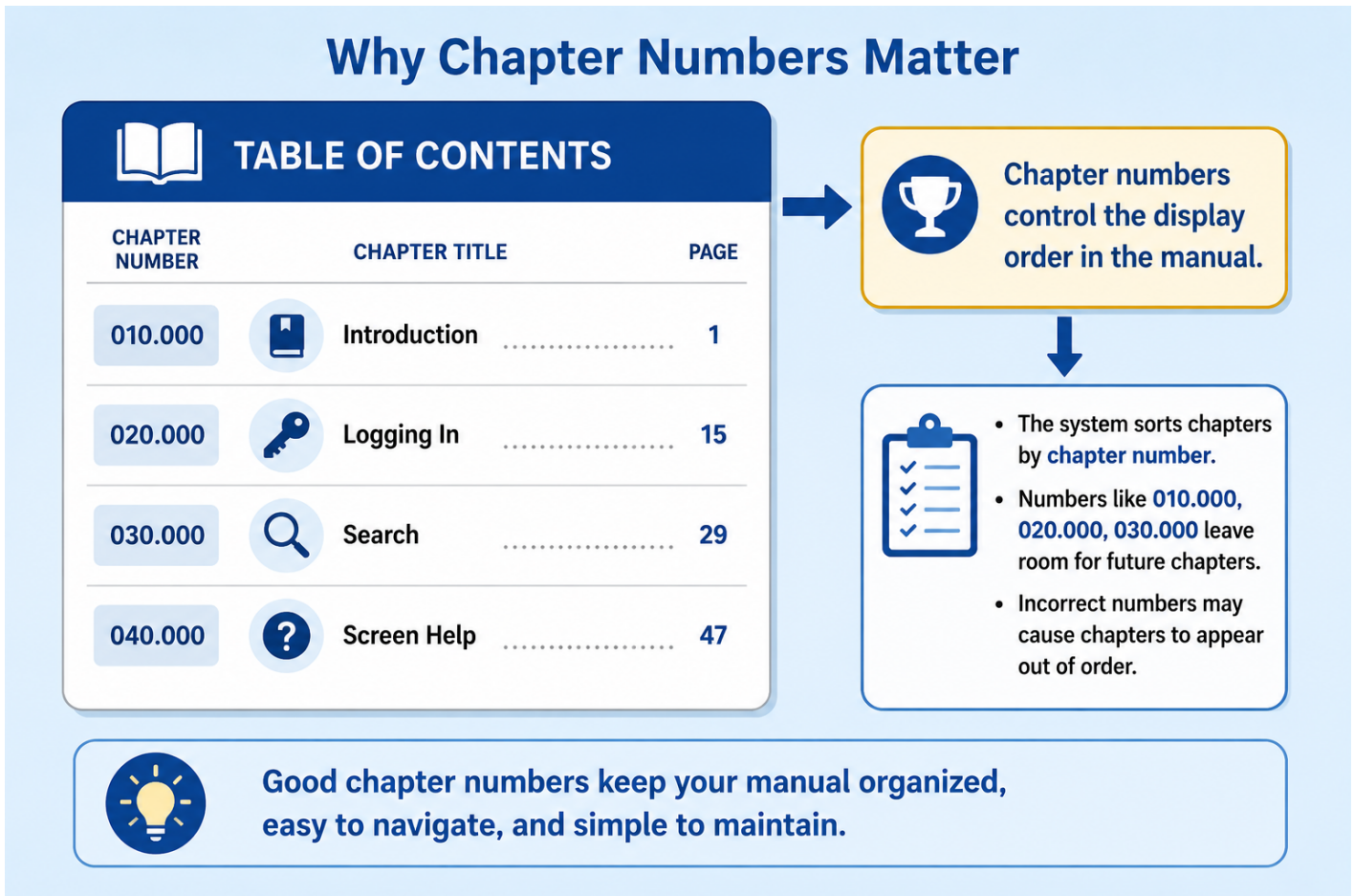
A clear numbering pattern also helps users understand where they are in the manual and how each major topic fits into the larger book.

If chapter numbers are entered incorrectly, chapters may appear out of order in the table of contents or generated manual.

Before adding a new chapter, decide where it belongs in the book and assign a number that places it in the correct sequence.

Consistent chapter numbering improves navigation, search organization, and long term maintenance of the manual.

Good chapter numbers make the book easier to read, easier to expand, and easier to manage over time.



30.000 - Why Section Numbers Matter

Screen | 2026-05-16 14:39:45 TM_C090_S030

030.000 Why Section Numbers Matter

Purpose

This section explains why section numbers are essential for organizing detailed content within each chapter.

Each chapter is divided into individual sections, and the system sorts those sections by section number.

Section numbers normally begin with 010.000 and increase by 010.000 for each new section within the chapter.

This numbering pattern creates a logical reading order and leaves room to insert additional sections later if needed.

For example, sections numbered 010.000, 020.000, 030.000, and 040.000 appear in sequence regardless of the order in which they were created.

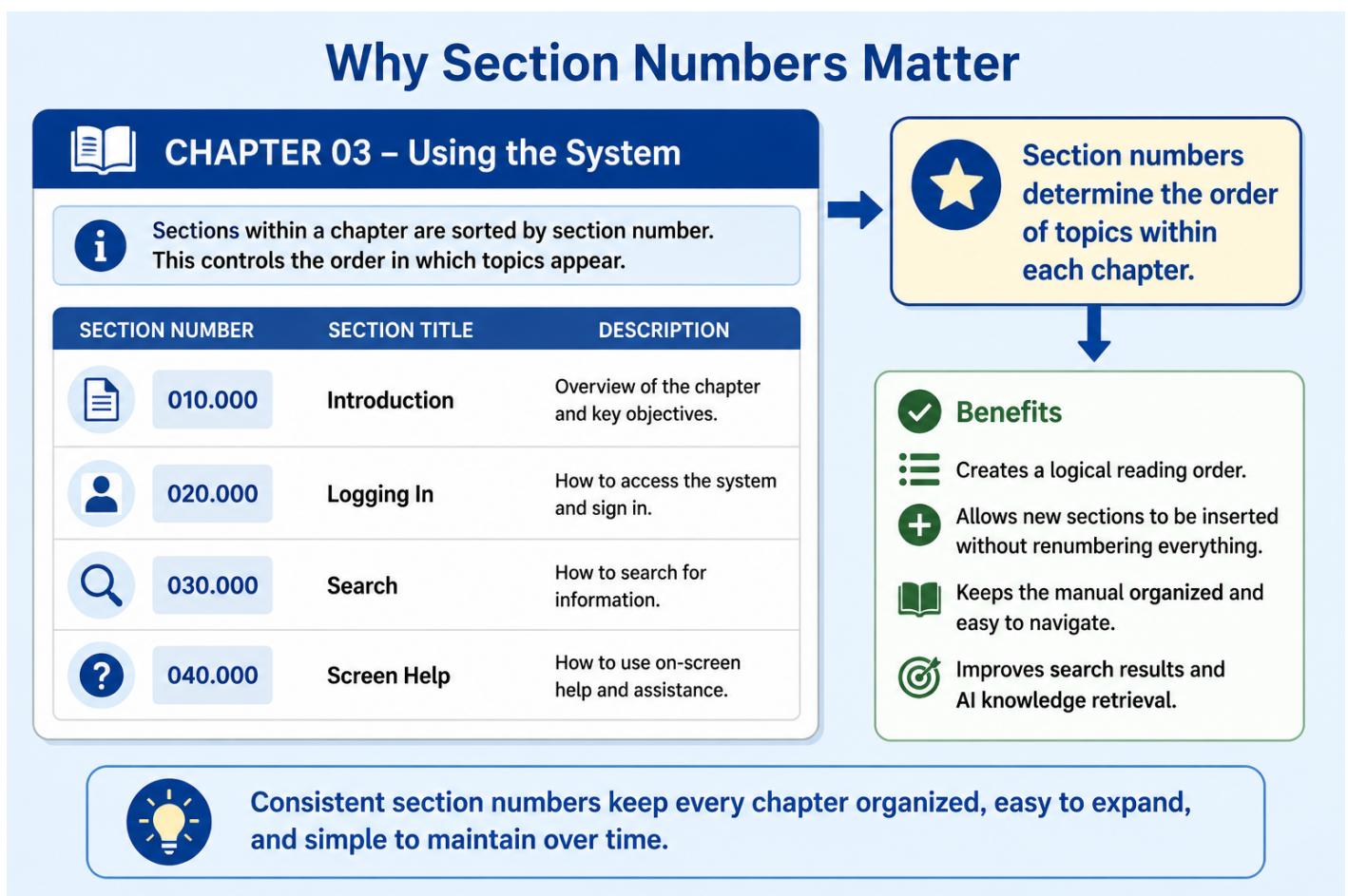
If a new topic needs to be inserted between two existing sections, an unused number can be assigned to place the new material in the proper location.

Section numbers are displayed in the online manual, printed manuals, and generated PDF books.

They also help readers understand where they are within a chapter and how each topic relates to the surrounding material.

Incorrect section numbers may cause content to appear in the wrong order and make the manual difficult to follow.

Consistent section numbering keeps every chapter organized, expandable, and easy to maintain.



40.000 - Naming Rules for Good Sections

Screen | 2026-05-16 14:39:45 TM_C090_S040

040.000 Naming Rules for Good Sections

Purpose

This section explains how to create effective section names for books and manuals.

A section name should clearly describe the specific topic covered by the section.

Good section names are concise, meaningful, and easy for readers to understand.

The section name appears in the table of contents, online manual, generated PDF books, search results, and Chat AI Agent responses.

Because the section name is used throughout the system, it should accurately reflect the content contained in the section.

Use business-oriented language that immediately tells the reader what will be learned.

Avoid vague titles such as Miscellaneous Notes or General Information.

Prefer descriptive names such as Creating a Chapter, Running a Chat Performance Report, or Loading PDF DOCX and RTF Documents.

Section names should be unique within the chapter and should remain understandable even when viewed outside the context of the full manual.

Well chosen section names improve navigation, search results, and the quality of Artificial Intelligence retrieval.

Clear and consistent section names make manuals easier to read, easier to maintain, and more valuable as long term knowledge assets.

Naming Rules for Good Sections

Good section names clearly describe the topic and help users find the information they need.

POOR SECTION NAMES

Vague, unclear, and not helpful

! **Miscellaneous Notes**

Too vague. Does not tell the reader what the section contains.

! **General Information**

Too broad. Does not describe a specific topic.

! **Other Topics**

Unclear and unhelpful. Not meaningful to the reader.

➔

GOOD SECTION NAMES

Clear, descriptive, and helpful

✓ **Creating a Chapter**

Clearly tells the reader what the section covers.

✓ **Running a Chat Performance Report**

Specific and meaningful. Easy to understand.

✓ **Loading PDF DOCX and RTF Documents**

Describes the exact task covered in the section.

USE CLEAR AND DESCRIPTIVE NAMES

Remember: Section names appear in the Table of Contents, online manual, PDF books, search results, and Chat AI Agent responses. Choose names that accurately represent the content and help users succeed.

CLEAR NAMES DELIVER REAL BENEFITS

BETTER NAVIGATION

Users quickly find the information they need.

IMPROVED SEARCH

Better names produce more accurate and useful search results.

STRONGER AI RETRIEVAL

AI Agents understand the content and provide better answers.

EASIER MAINTENANCE

Clear names remain understandable over time.

LONG TERM VALUE

Good names make manuals more valuable as knowledge assets.

100.000 - Creating a Book

10.000 - When to Create a Book

Screen | 2026-05-16 14:39:45 TM_C100_S010

010.000 When to Create a Book

Purpose

This section explains when a new Book should be created in the Corporate Intelligence System.

A Book represents the highest level of organization for a body of knowledge.

Each Book contains one or more Chapters, and each Chapter contains one or more Sections.

Create a new Book whenever you want to build a complete manual, operating guide, policy collection, department handbook, or other organized knowledge resource.

Examples include the Training Manual, Operating Manual, Human Resources Manual, Information Technology Policies Manual, and Accounting Procedures Manual.

A Book should be created when the content represents a distinct subject area that will grow over time and benefit from structured organization.

Books provide a container that allows information to be organized, searched, displayed online, printed as PDF documents, and used by the Chat AI Agent.

Each Book can contain hundreds or thousands of Sections, making it possible to build very large and highly structured knowledge systems.

Before creating a Book, consider the intended audience, subject matter, and long term purpose of the manual.

A well planned Book becomes a durable knowledge asset that can support training, operations, compliance, and Artificial Intelligence retrieval.

Whenever you want to organize substantial knowledge into a structured and searchable manual, you should begin by creating a Book.

010.000 When to Create a Book

Create a new Book whenever you want to build a complete manual, operating guide, policy collection, or other organized knowledge resource.



20.000 - Creating the Book Record

Screen | 2026-05-16 14:39:45 TM_C100_S020

020.000 Creating the Book Record

Purpose

This section explains how to create a new Book record in the Corporate Intelligence System.

Open the Book Titles screen from the Books Chapters menu.

The Book Titles screen stores one record for each manual or knowledge collection maintained in the system.

Select Add to begin creating a new Book record.

Enter a clear and descriptive Book Name such as Training Manual, Operating Manual, or Human Resources Manual.

Complete any additional fields required by your organization.

Press Save to store the new Book record.

After the Book has been created, it becomes available for use when creating Chapters and Sections.

The Book can also be viewed in the online manual, included in generated PDF books, and used as a source for Artificial Intelligence retrieval.

Creating the Book record is the first operational step in building a structured manual.

Once the Book exists, you are ready to create the Chapters that will organize its contents.

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

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
		1,000	Operating Manual	ivan	2026-02-25 17:52:35

BookNumber: 1,000 BookName: Operating Manual

Save Cancel

30.000 - Book Naming Best Practices

Screen | 2026-05-16 14:39:45 TM_C100_S030

030.000 Book Naming Best Practices

Purpose

This section explains how to choose effective names for Books in the Corporate Intelligence System.

The Book Name is one of the most important identifying elements in the system because it appears in menus, search results, online manuals, generated PDF books, and Chat AI Agent responses.

A good Book Name clearly describes the subject matter covered by the manual.

Use names that are meaningful to the intended audience and that immediately communicate the purpose of the content.

Examples of strong Book Names include Training Manual, Operating Manual, Human Resources Manual, and Accounting Procedures Manual.

Avoid vague or overly broad names such as Miscellaneous Notes, General Information, or Other Topics.

Choose names that will remain accurate as the manual grows over time.

Consistent naming conventions improve organization, navigation, search results, and Artificial

Intelligence retrieval.

Before creating a Book, consider whether the name will still be appropriate after hundreds of Chapters and Sections have been added.

A well chosen Book Name makes the manual easier to understand and more valuable as a long term knowledge asset.

Clear and descriptive names are the foundation of well organized documentation.

030.000 Book Naming Best Practices

Choose clear and descriptive Book Names that accurately describe the content and are meaningful to your audience.

POOR BOOK NAMES

Vague, unclear, and not helpful

Miscellaneous Notes

Too vague. Does not tell users what the manual contains.

General Information

Too broad. Does not describe a specific subject.

Other Topics

Unclear and unhelpful. Not meaningful to users.

USE CLEAR
AND DESCRIPTIVE
NAMES

GOOD BOOK NAMES

Clear, descriptive, and helpful

Training Manual

Clearly describes the content and the purpose.

Operating Manual

Specific and meaningful to users.

Human Resources Manual

Clearly communicates the subject area.

Accounting Procedures Manual

Describes the exact area covered in the manual.

Clear Book Names improve organization, search, and Artificial Intelligence retrieval.

A well chosen Book Name makes the manual easier to understand and more valuable as a long term knowledge asset.

110.000 - Creating Chapters

10.000 - When to Create a Chapter

Screen | 2026-05-16 14:39:45 TM_C110_S010

010.000 Understanding Chapters

Purpose

This section explains the role of Chapters within a Book.

A Chapter is the second level of organization in the Corporate Intelligence System.

Each Book contains one or more Chapters, and each Chapter contains one or more Sections.

Chapters group related Sections into major subject areas.

For example, the Training Manual contains Chapters such as Creating a Book, Creating Chapters, Loading Documents, and Using the Chat AI Agent.

Chapters help readers navigate large manuals by dividing information into logical and manageable topics.

Each Chapter has a Chapter Number and a Chapter Name.

The Chapter Number controls the order in which Chapters appear in the manual.

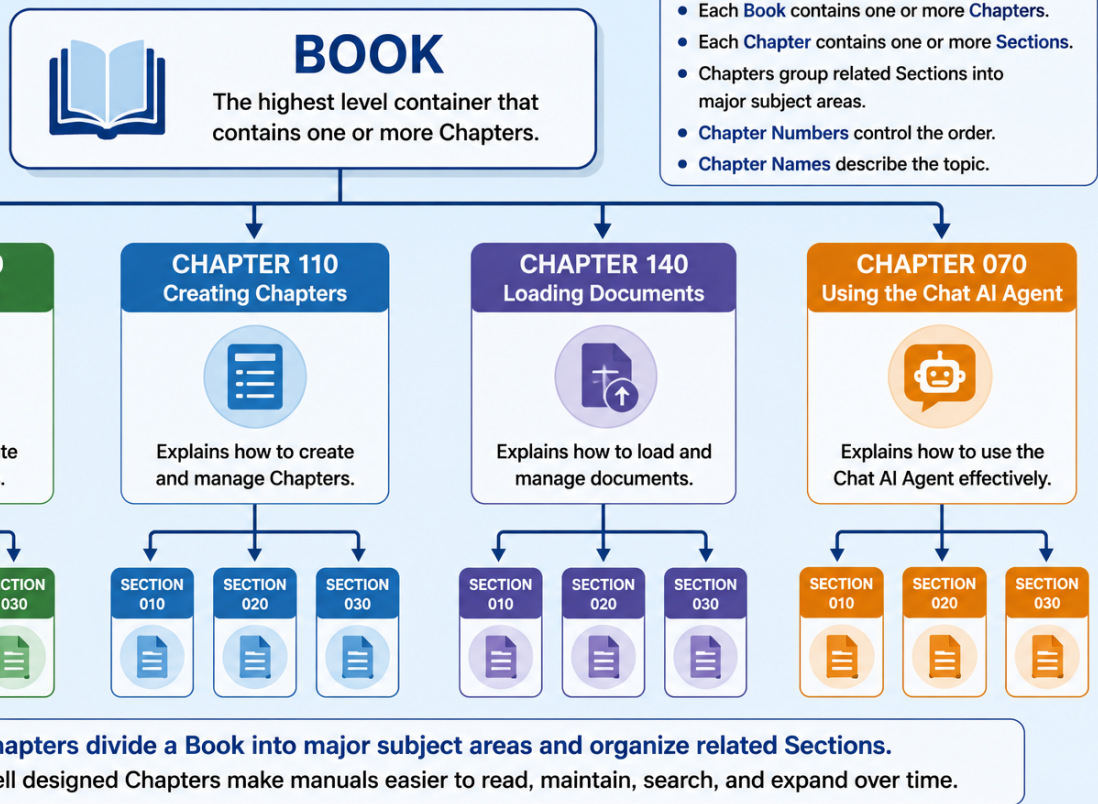
The Chapter Name describes the major topic covered by the Chapter.

Well designed Chapters make manuals easier to read, maintain, search, and expand over time.

After creating a Book, the next step is to create the Chapters that will organize its contents.

010.000 Understanding Chapters

A Chapter is the second level of organization in a Book.



20.000 - Creating a Chapter

Screen | 2026-05-16 14:39:45 TM_C110_S020

020.000 Creating the Chapter Record

Purpose

This section explains how to create a new Chapter record within an existing Book.

Open the Book Chapters screen from the Books Chapters menu.

The Book Chapters screen stores the major divisions that organize the content of each Book.

Select Add to begin creating a new Chapter record.

Select the Book Name to which the Chapter belongs.

Enter the Chapter Number, such as 110.000, to control the order in which the Chapter appears in the manual.

Enter a clear and descriptive Chapter Name that summarizes the subject matter of the Chapter.

Complete any additional fields required by your organization.

Press Save to store the Chapter record.

After the Chapter has been created, it becomes available when creating the Sections that will contain

the detailed instructional content.

Creating well planned Chapters provides the structural foundation for organizing large manuals into logical subject areas.

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 Select

View Delete 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...

30.000 - Chapter Numbering for Sorting

Screen | 2026-05-16 14:39:45 TM_C110_S030

030.000 Choosing Effective Chapter Names

Purpose

This section explains how to create clear and meaningful Chapter Names.

The Chapter Name appears in the table of contents, online manuals, generated PDF books, search results, and Chat AI Agent responses.

A good Chapter Name clearly identifies the major subject area covered by the Chapter.

Use names that are concise, descriptive, and understandable to the intended audience.

Examples of strong Chapter Names include Creating a Book, Creating Chapters, Loading Documents, and Using the Chat AI Agent.

Avoid vague names such as Miscellaneous Topics, General Information, or Other Subjects.

Select names that remain meaningful as additional Sections are added to the Chapter over time.

Consistent naming conventions improve organization, navigation, search, and Artificial Intelligence

retrieval.

Before saving a new Chapter, consider whether the name accurately summarizes the major topic that the reader will encounter.

A well chosen Chapter Name makes the manual easier to understand and easier to maintain.

Clear Chapter Names help transform a collection of documents into a structured and professional knowledge system.

030.000 Choosing Effective Chapter Names

Choose clear and descriptive Chapter Names that accurately identify the major subject area covered by the Chapter.

POOR CHAPTER NAMES

Vague, unclear, and not helpful

Miscellaneous Topics

Too vague. Does not tell readers what the chapter covers.

General Information

Too broad. Does not describe a specific subject area.

Other Subjects

Unclear and unhelpful. Not meaningful to readers.

➔

GOOD CHAPTER NAMES

Clear, descriptive, and helpful

Creating a Book

Clearly identifies the major topic of the chapter.

Loading Documents

Clearly describes the subject covered in the chapter.

Using the Chat AI Agent

Specific and meaningful to readers.

Searching the Knowledge Base

Describes the exact area covered in the chapter.

Clear Chapter Names improve navigation, search, and Artificial Intelligence retrieval.

A well chosen Chapter Name makes the manual easier to understand and easier to maintain over time.

40.000 - Good Chapter Names

Screen | 2026-05-16 14:39:45 TM_C110_S040

040.000 Selecting Proper Chapter Numbers

Purpose

This section explains how to assign Chapter Numbers that maintain the correct order of Chapters within a Book.

Chapter Numbers are decimal values such as 010.000, 020.000, 030.000, and 040.000.

The system sorts Chapters by Chapter Number to determine the order in which they appear in the online manual, generated PDF books, and table of contents.

Using increments of 010.000 leaves room to insert additional Chapters later without renumbering the

entire Book.

For example, if a new Chapter must be placed between 020.000 and 030.000, a number such as 025.000 can be assigned.

Chapter Numbers should reflect the logical flow of the manual rather than the order in which Chapters were created.

Plan the overall structure of the Book before assigning numbers to ensure a clear and expandable organization.

Incorrect Chapter Numbers may cause Chapters to appear out of sequence and confuse readers.

Consistent numbering improves maintenance, navigation, and long term growth of the manual.

Well planned Chapter Numbers provide flexibility and help preserve the structure of the Book as new material is added.

Thoughtful numbering is one of the most important disciplines in professional documentation design.

040.000 Selecting Proper Chapter Numbers

Chapter Numbers determine the order in which Chapters appear in the manual, PDF books, and table of contents.

The system sorts Chapters by Chapter Number in ascending order.

EXAMPLE CHAPTER ORDER

010.000	Introduction	
020.000	Login and Security	
025.000	New Chapter (Inserted)	
030.000	Search and Help	
040.000	Chat AI Agent	
050.000	Books and Chapters	

WHY INCREMENTS OF 010.000?

Using increments of 010.000 leaves space to insert new Chapters without renumbering.

EXAMPLE

To insert a new Chapter between

020.000

and

030.000

025.000

 New Chapter

✓

Chapter Numbers should reflect the logical flow of the manual.

✓

Proper numbering improves navigation, maintenance, and long term growth.

Using increments of 010.000 leaves room for future Chapters.

Plan ahead to maintain the correct order and provide flexibility for growth.

120.000 - Creating Book Sections with the Screen Module

10.000 - What a Screen Document Is

Screen | 2026-05-16 14:39:45 TM_C120_S010

010.000 Understanding Book Sections

Purpose

This section explains the role of Book Sections in the Corporate Intelligence System.

A Section is the lowest and most detailed level of organization within a Book.

Each Chapter contains one or more Sections, and each Section contains the actual instructional or reference content presented to the reader.

Sections are where the knowledge is stored.

A Section may contain explanatory text, images, diagrams, examples, tables, and hyperlinks.

Each Section is stored as a Screen Document and is maintained through the Screen Documents module.

Sections appear in the online manual, printed PDF books, search results, and Chat AI Agent responses.

Because Sections contain the detailed knowledge, they are the most important building blocks in the documentation system.

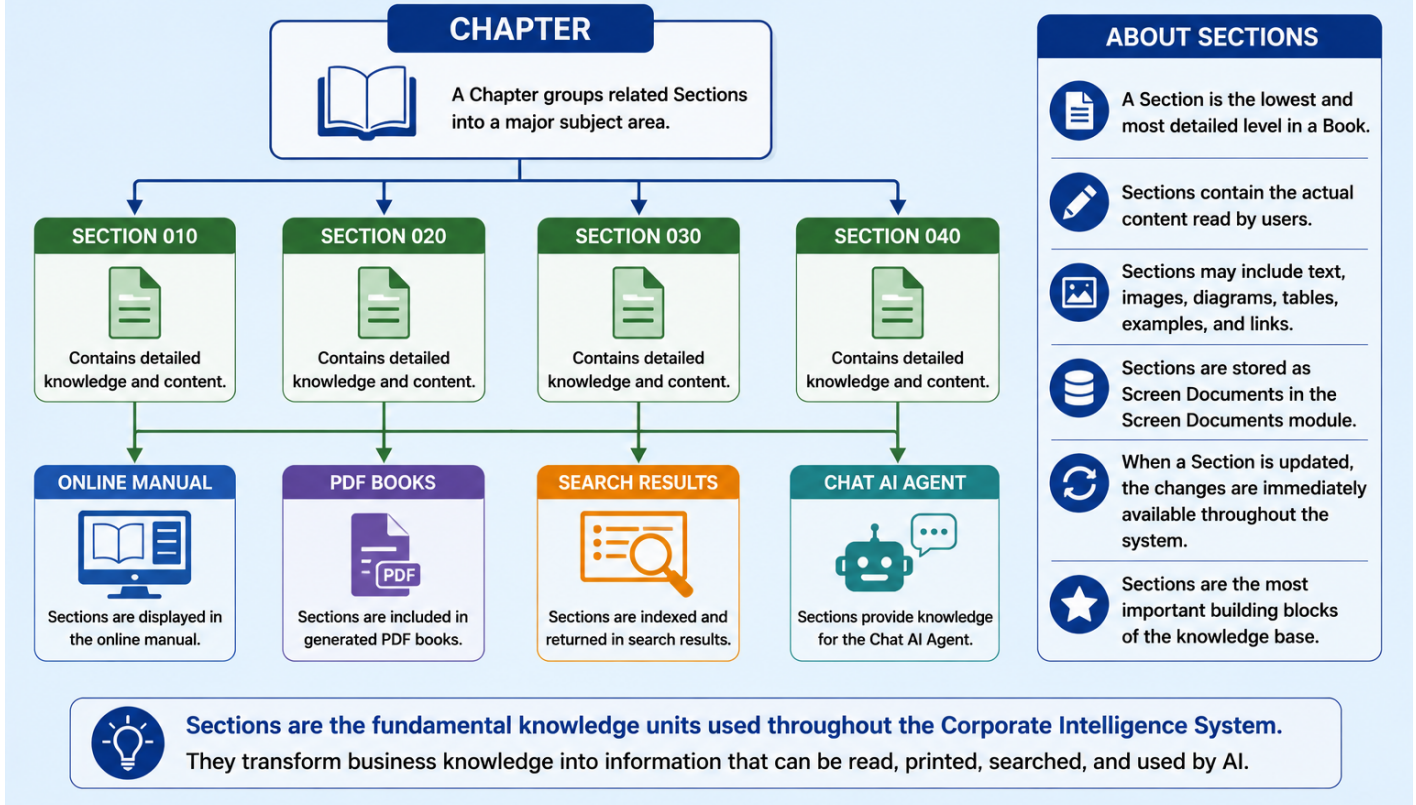
A single Book may contain hundreds or thousands of Sections organized under many Chapters.

When a Section is updated, the new content immediately becomes available throughout the Corporate Intelligence System.

Well written Sections transform business knowledge into structured information that can be searched, read, printed, and used by Artificial Intelligence.

010.000 Understanding Book Sections

Sections are the lowest level of content and contain the detailed knowledge.



20.000 - Why Screen Name Must Be Unique

Screen | 2026-05-16 14:39:45 TM_C120_S020

020.000 Opening the Screen Documents Module

Purpose

This section explains how to open the Screen Documents module, which is used to create and maintain Book Sections.

The Screen Documents module stores the individual Sections that make up the detailed content of each Chapter.

Each Screen Document contains the HTML text, images, metadata, and keywords used throughout the Corporate Intelligence System.

Open the Screen Documents module from the Screens Documents menu.

The Screen Documents screen allows you to create new Sections, update existing Sections, and review previously entered content.

Each Section is identified by a unique Screen Name such as TM_C120_S020.

The Screen Documents module is one of the most important programs in the entire system because it is where the actual knowledge is authored and maintained.

Sections created here become immediately available to the online manual, generated PDF books, Search, and the Chat AI Agent.

When creating a new Section, begin by opening this module and selecting Add.

Once the Screen Documents module is open, you are ready to create the detailed content for your Book Section.

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

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

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>

30.000 - Why Section Name Matters

Screen | 2026-05-16 14:39:45 TM_C120_S030

030.000 Creating the Section Record Purpose

This section explains how to create a new Book Section using the Screen Documents module.

Select Add to begin a new Screen Document record.

Enter a unique Screen Name using the established naming convention, such as TM_C120_S030.

Select the Book Name to which the Section belongs.

Select the Chapter Name in which the Section will appear.

Enter the Section Number, such as 030.000, to control the order of the Section within the Chapter.

Enter a clear and descriptive Section Name that identifies the topic covered by the Section.

Select SCREEN_DOCUMENT as the Doc Type.

Select ALL as the Audience unless access to the Section should be restricted.

Select HTML as the Help Mode.

Press Save to create the new Section record and prepare it for content entry.

Once the Section record has been created, you are ready to enter the HTML content that will become part of the online manual, generated PDF books, Search, and the Chat AI Agent.

Corporate Intelligence System

Home ?

Ask for Help...

Screen Name: SN_Screen

Description: SN_Screen

Chat with Me

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

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
Src: 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:

40.000 - Creating a Section

Screen | 2026-05-16 14:39:45 TM_C120_S040

040.000 Writing Section Content

Purpose

This section explains how to write the HTML content that becomes the body of a Book Section.

The Screen Help field contains the actual HTML that is displayed in the online manual and included in generated PDF books.

Each section begins with a div element using the manual-section class, followed by a numbered h2 heading and one or more subsections such as Purpose, Processing, and Related Information.

Content is written using standard HTML elements such as paragraphs, headings, images, and tables.

The HTML may be typed manually, pasted from another source, or generated with the Chat AI Agent.

You can ask the Chat AI Agent to create complete section content in properly formatted HTML by providing the section number, title, and subject matter to be covered.

After the HTML is generated, review the content carefully and make any necessary adjustments before saving.

Images may be inserted using image tags that reference files stored in the manual images directory.

Each image should use the established naming convention based on the Screen Name.

Well written Section content becomes part of the online manual, generated books, Search results, and Chat AI Agent knowledge.

The quality of the written content directly affects the usefulness of the entire Corporate Intelligence System.

Corporate Intelligence System

Ask for Help...

Chat with Me

Home ?

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 Description: Load Emails into the System

Chapter Name: Loading Documents for Intelligent Chat Retrieval

Screen Name: SN_IngestEmail

Doc Type: SCREEN_DOCUMENT

Section Number: 100.000

Security Group Number: 21

Audience: BOTH

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>

50.000 - Writing Section Content

Screen | 2026-05-16 14:39:45 TM_C120_S050

050.000 How the System Automatically Creates Keywords and Classification

Purpose

This section explains how the Corporate Intelligence System automatically analyzes each Section after it is saved.

When you create a Book Section, your primary responsibility is to write clear, accurate, and complete content.

You do not need to manually assign keywords or additional classification information.

After the Section is saved and processed, the Artificial Intelligence engine reads the content and automatically identifies important terms, concepts, and relationships.

The system generates keywords and other internal classification data based on the actual text you have written.

This automatic analysis allows the Search system and the Chat AI Agent to locate the Section when users ask relevant questions.

Because the system derives this information directly from the content, the quality of your writing has a significant impact on retrieval accuracy.

Use clear terminology, descriptive headings, and complete explanations so the Artificial Intelligence engine can better understand the subject matter.

You may also use the Chat AI Agent to help draft and refine HTML content before saving the Section.

Well written Sections are automatically transformed into highly searchable and intelligent knowledge assets.

Your focus should be on creating useful content while the system performs the technical analysis behind the scenes.

60.000 - Saving Chunking and Vectoring

Screen | 2026-05-16 14:39:45 TM_C120_S060

060.000 Saving and Reviewing the Section

Purpose

This section explains how to save a completed Section and immediately review it using the Screen Help feature.

After entering the Section information and HTML content, press Save to store the record in the Screen Documents module.

Once the Section has been saved, the content becomes available for immediate viewing.

The fastest way to review the finished Section is to open any screen in the system and click the Help button.

In the Screen Help search box, enter the Screen Name of the Section you created, such as TM_C120_S060.

Select the matching Section from the search results to display the completed content exactly as users will see it.

Review the Section Number, Section Name, headings, paragraphs, and image references carefully.

If the Section includes images, confirm that each image appears correctly and is properly positioned.

If formatting problems, missing images, or wording issues are found, return to the Screen Documents module and update the HTML content.

After making corrections, save the Section again and repeat the Screen Help review process.

This immediate review method allows you to verify your work without generating the entire Book.

A Section should be considered complete only after it has been saved and reviewed successfully through Screen Help.

130.000 - Creating Procedures

10.000 - What a Procedure Is

Screen | 2026-05-16 14:39:45 TM_C130_S010

010.000 What a Procedure Is

Purpose

This section explains what a procedure is and why procedures are one of the most valuable forms of organizational knowledge.

A procedure is a structured set of step by step instructions that explains how to perform a specific task or complete a recurring business process.

Procedures are used to document operational activities such as processing invoices, hiring employees, loading documents, performing backups, generating reports, and completing month end activities.

Unlike general reference material, a procedure focuses on the exact sequence of actions required to achieve a desired result.

Well written procedures reduce confusion and help ensure that work is performed consistently regardless of who performs the task.

Procedures are especially important when tasks are complex, performed infrequently, or require compliance with established business rules.

Within the Corporate Intelligence System, procedures are stored as structured knowledge that can be viewed online, included in downloadable books, searched through the inverted index, and used by the Chat AI Agent to answer operational questions.

This means that one well documented procedure can support training, onboarding, troubleshooting, operational consistency, and preservation of institutional knowledge.

When experienced employees explain how work is actually performed, their knowledge can be captured in procedures so that the information remains available long after those individuals move to other roles or leave the organization.

Many users find it helpful to use a commercial Artificial Intelligence chat tool to draft the initial HTML for a procedure. By providing a clear description of the task and requesting output in the required HTML format, the user can quickly generate a structured first draft and then refine the content within the Procedure Documents screen.

When using this approach, instruct the chat tool to begin the HTML with the standard opening structure shown below so the procedure is immediately compatible with the Corporate Intelligence System.

```
<div class="manual-section">
```

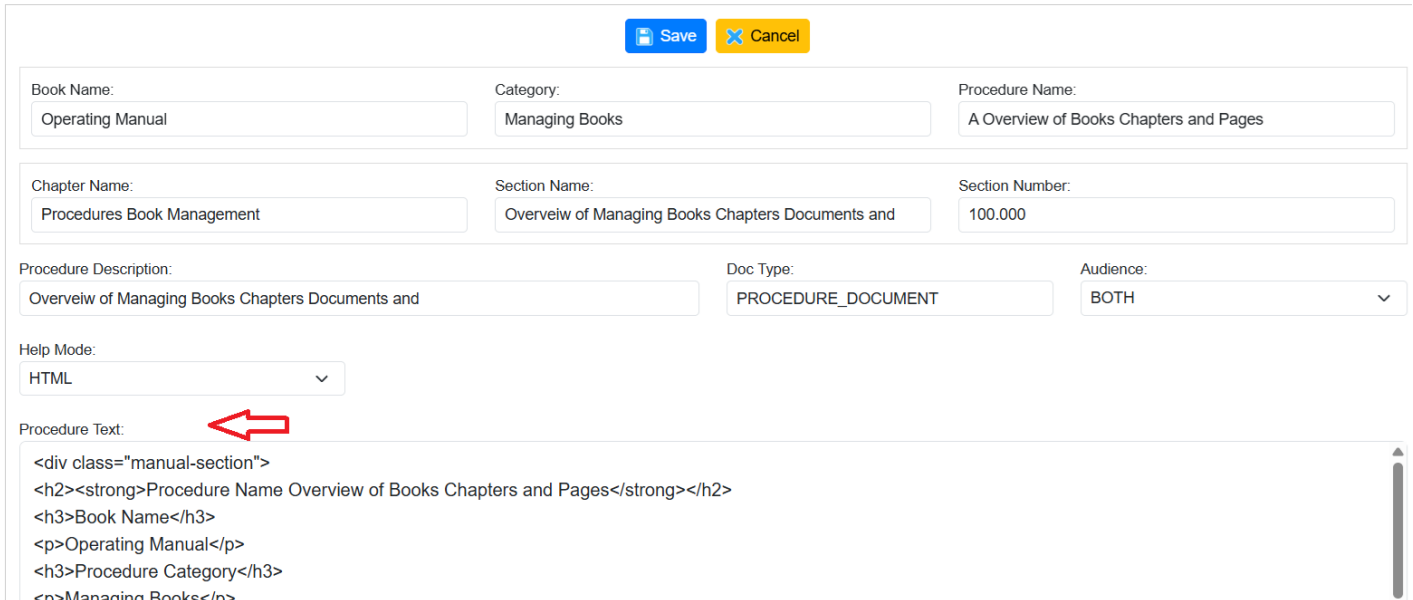
```
<h2><strong>010.000 What a Procedure Is</strong></h2>
```

```
<h3>Purpose</h3>
```

<p>This section explains ...</p>

Starting with this standard structure ensures that all procedures follow a consistent format and can be displayed properly in the Online Manual, included in generated books, indexed for search, and used by the Chat AI Agent.

Procedures transform practical experience into reusable organizational intelligence that can be shared across the enterprise.



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>
```

20.000 - Creating a Procedure

Screen | 2026-05-16 14:39:45 TM_C130_S020

020.000 Creating a Procedure

Purpose

This section explains how to create a new procedure and assign it to a book and chapter within the Corporate Intelligence System.

Procedures are used to document step by step instructions that describe how specific business tasks are performed.

Begin by selecting Procedure Documents from the Main Menu.

The Procedure Documents screen allows you to create, edit, search, and maintain procedures that can be viewed online, included in books, searched through the inverted index, and used by the Chat AI Agent.

Select the Add button to create a new procedure record.

Enter the Book Name that will contain the procedure.

Select the Chapter Number where the procedure should appear.

Enter the Section Number that determines the order of the procedure within the chapter.

Enter a descriptive Procedure Name that clearly identifies the task being documented.

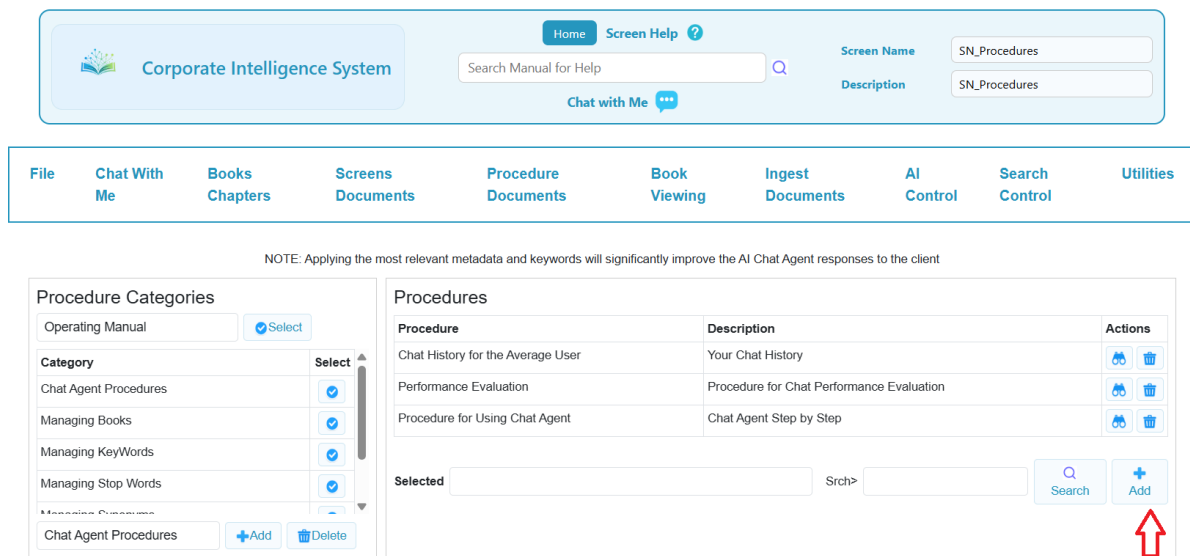
Assign an appropriate Audience so the procedure is visible to the intended users.

Enter the procedure instructions using clear step by step language.

Select Save to store the procedure in the database.

After saving, the procedure becomes available for online viewing, searching, and Artificial Intelligence retrieval.

Creating procedures in a structured manner ensures that important operational knowledge is preserved and easily reused throughout the organization.



The screenshot displays the 'Corporate Intelligence System' interface. At the top, there is a navigation bar with links for 'Home', 'Screen Help', and a 'Chat with Me' button. Below this is a search bar labeled 'Search Manual for Help'. To the right, there are input fields for 'Screen Name' and 'Description', both containing the text 'SN_Procedures'. Below the navigation bar is a horizontal menu with various options: 'File', 'Chat With Me', 'Books Chapters', 'Screens Documents', 'Procedure Documents', 'Book Viewing', 'Ingest Documents', 'AI Control', 'Search Control', and 'Utilities'. The main content area is divided into two sections. The left section, titled 'Procedure Categories', shows a list of categories with a 'Select' button next to each. The right section, titled 'Procedures', contains a table with columns for 'Procedure', 'Description', and 'Actions'. The table lists three procedures: 'Chat History for the Average User', 'Performance Evaluation', and 'Procedure for Using Chat Agent'. Below the table, there is a 'Selected' input field, a 'Srch>' button, and a 'Search' button. A red arrow points to the 'Add' button in the bottom right corner of the 'Procedures' section.

30.000 - Writing Good Procedure Steps

Screen | 2026-05-16 14:39:45 TM_C130_S030

030.000 Writing Good Procedure Steps

Purpose

This section explains how to write procedure steps that are clear, accurate, and easy for others to follow.

A good procedure should allow a knowledgeable employee to complete a task successfully by following the instructions exactly as written.

Each step should describe one logical action in the order the work is performed.

Use clear and direct language such as Select Save, Enter the Book Name, or Review the generated results.

Avoid vague statements that assume the reader already understands what to do.

When a task requires a decision, explain the conditions that determine which action should be taken.

Include important warnings, prerequisites, approvals, and exceptions whenever they are necessary to complete the process correctly.

Use the names of actual screens, buttons, fields, reports, and menu options so the instructions match what the user sees.

Write enough detail so that the task can be performed consistently, but avoid unnecessary information that distracts from the main process.

When appropriate, include examples and screen images to clarify complex steps.

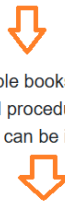
Many users prepare an initial draft by describing the process to a commercial Artificial Intelligence chat tool and requesting structured HTML output. This approach can save considerable time, especially when documenting procedures that contain many steps.

After generating the draft, carefully review each step to ensure that the instructions are accurate, complete, and consistent with the way the process is actually performed.

Well written procedures reduce errors, improve training, and preserve practical knowledge that might otherwise be lost.

The quality of the procedure directly affects the quality of search results, online manuals, and Chat AI responses that rely on the same content.

```
<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 It</h3>
```



40.000 - Procedure Names and Categories

Screen | 2026-05-16 14:39:45 TM_C130_S040

040.000 Procedure Names and Categories

Purpose

This section explains how to choose effective procedure names and organize procedures into meaningful categories.

A well chosen procedure name should clearly describe the task being performed and allow users to understand the purpose of the procedure immediately.

Good names typically begin with an action such as Creating, Loading, Processing, Generating,

Reviewing, or Configuring.

Examples include Creating a Procedure, Loading PDF DOCX and RTF Documents, Running Website Backups, and Configuring Email Settings.

Descriptive names improve the readability of online manuals, generated books, keyword search results, and Chat AI responses.

Whenever possible, use the same terminology that employees already use within the organization.

Avoid vague names such as General Procedure or Miscellaneous Steps because they provide little guidance to the reader and weaken search effectiveness.

Procedures are categorized primarily by the Book Name and Chapter Number to which they are assigned.

The Book groups related procedures into a larger manual, while the Chapter organizes procedures into logical subject areas.

The Section Number determines the order in which procedures appear within the chapter.

Together, these fields create a structured hierarchy that makes procedures easy to locate and maintain.

Consistent naming and categorization improve organization, search quality, and long term usability of the knowledge base.

When procedures are named clearly and placed in the correct categories, users can find information more quickly and the Chat AI Agent can retrieve more relevant content.

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		

140.000 - Loading PDF DOCX and RTF Documents

10.000 - When to Use Document Ingestion

Screen | 2026-05-16 14:39:45 TM_C140_S010

010.000 When to Use Document Ingestion

Purpose

This section explains when to use document ingestion and how it converts existing files into searchable and conversational organizational knowledge.

Document ingestion should be used whenever valuable information already exists in electronic form and you want to make that information available to the Corporate Intelligence System.

Typical source files include PDF, DOCX, RTF, spreadsheets, emails, letters, memoranda, program files, and plain text documents.

Organizations often possess years of manuals, policy documents, contracts, reports, training guides, and technical references that contain valuable operational knowledge.

Without ingestion, this information remains stored in folders and archives but is not fully available to search or to the Chat AI Agent.

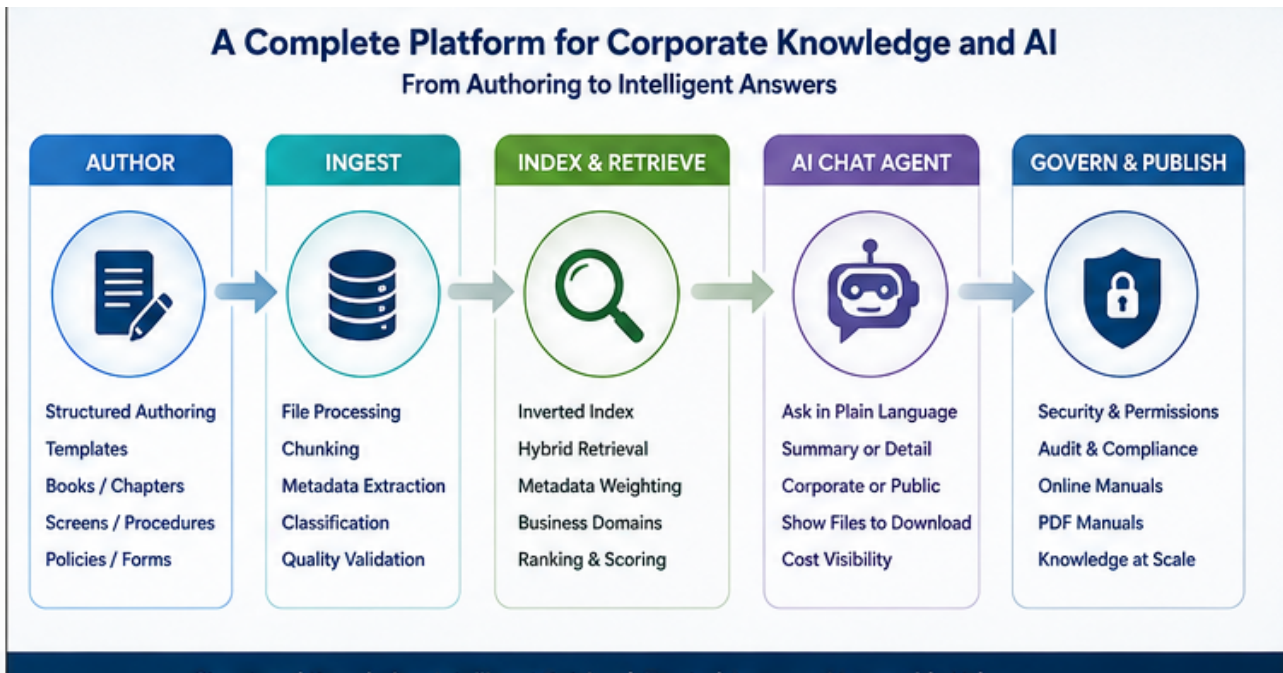
The ingestion process converts these files into structured text, divides the content into manageable chunks, assigns metadata and keywords, and prepares the material for vector generation and retrieval.

Once ingestion is complete, users can search the content, view related documents, and ask questions in natural language through the Chat AI Agent.

This process allows historical and current business knowledge to become an active part of the organization's operational intelligence.

Document ingestion is especially valuable when loading large manuals, policies, procedures, contracts, research materials, and technical documentation.

If the information already exists in electronic form, document ingestion is usually the fastest way to make it searchable and available to Artificial Intelligence.



20.000 - Preparing the File Before Upload

Screen | 2026-05-16 14:39:45 TM_C140_S020

020.000 Preparing the File Before Upload

Purpose

This section explains how to prepare a document before uploading it into the Corporate Intelligence System.

Careful preparation improves the quality of the extracted text and increases the likelihood that the document will produce accurate search results and stronger Chat AI responses.

Begin by confirming that the file contains useful information and that the content is as complete and current as possible.

Review the document for duplicated pages, obsolete material, and unnecessary attachments that do not contribute meaningful knowledge.

If the file contains scanned pages, verify that the text is readable and that optical character recognition has been performed if necessary.

Choose a descriptive file name that helps identify the contents of the document.

Whenever possible, determine the appropriate Business Domain, Document Type, and Audience before starting the upload.

Consider writing a concise but informative Document Description that explains what the file contains and why the information is important.

For large manuals and books, ensure that the document is well organized with clear headings and logical sections.

For spreadsheets, verify that the column headings accurately describe the data.

For emails and memoranda, confirm that the subject and body text clearly communicate the key points.

Good preparation reduces processing issues and improves the overall usefulness of the ingested knowledge.

The quality of the uploaded file has a direct impact on the quality of search results and Artificial Intelligence responses.

Corporate Intelligence System

Home ?

Ask for Help...

Screen Name
SN_IngestPDFDOCXRTF

Description
SN_IngestPDFDOCXRTF

Chat with Me

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
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

Add New

Apply Selection

Select

Press Select when done.

Select File

Choose File
No file chosen

Upload

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.

30.000 - Entering Document Information

Screen | 2026-05-16 14:39:45 TM_C140_S030

030.000 Entering Document Information

Purpose

This section explains how to complete the document information fields that describe the file being loaded into the Corporate Intelligence System.

After the source file is uploaded, the detail pane must be completed before parsing can begin.

These fields tell the system what the document contains and provide important business context that improves search, classification, and Artificial Intelligence retrieval.

Complete each field carefully and accurately.

Business Domain identifies the general subject area of the document, such as Accounting, Human Resources, Information Technology, Operations, or Legal.

Display Name provides the title that users will see in search results and document listings.

Document Type identifies the nature of the content, such as Manual, Policy, Procedure, Book, Contract, Spreadsheet, or Program.

Audience controls which users are allowed to view and retrieve the information.

Book Name, Chapter Number, and Section Number may be used when the content is intended to become part of a formal manual.

Document Description is one of the most important fields because it explains what the document contains, who it is for, and what kinds of questions it should help answer.

Additional metadata fields may be available depending on the ingest screen and document type.

The more accurately these fields are completed, the better the Chat AI Agent can understand the purpose and meaning of the content.

Well prepared document information improves keyword generation, chunk classification, search ranking, and final response quality.

Save

Clear

API Guidance			
Document Format	PDF_DOCUMENT	Document Mode	Manual
Expected Class	Manual	Audience	Both
Display Name	City Standard Operating Manual	Page Count	120
Business Domain	Operations		
Or enter custom Business Domain			
Select from the list or type a 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. 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.		

40.000 - Why Document Description Is Critical

Screen | 2026-05-16 14:39:45 TM_C140_S040

040.000 Why Document Description Is Critical Purpose

This section explains why the Document Description field is one of the most important entries in the entire document ingestion process.

The Document Description tells the system what the document contains, who the information is intended for, and what kinds of questions the Chat AI Agent should be able to answer from the content.

A strong description provides business context that helps the system classify the document more accurately and improves both search and Artificial Intelligence retrieval.

The description should be written in clear business language rather than as a short title.

Good descriptions summarize the purpose of the document, the topics covered, the intended audience, and the practical uses of the information.

For example, a strong description might explain that the document contains a complete human resources policy manual covering vacation rules, overtime, employee conduct, and benefits for managers and employees.

This level of detail helps the system understand what knowledge is contained in the file before any questions are asked.

The description is used during keyword generation, metadata analysis, chunk classification, and final response preparation.

When descriptions are vague or incomplete, search results and Chat AI answers may be less accurate because the system has less contextual guidance.

Well written descriptions often produce significantly better retrieval results than generic descriptions such as Employee Manual or Accounting Procedures.

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.

Investing a few extra minutes in writing a detailed description can greatly improve the usefulness of the document for years to come.

50.000 - Uploading the File

Screen | 2026-05-16 14:39:45 TM_C140_S050

050.000 Uploading the File

Purpose

This section explains the complete processing sequence that begins after the file has been uploaded and the document information has been entered and saved.

By the time you reach this stage, the source PDF, DOCX, or RTF file has already been uploaded to the server and all document information fields such as Business Domain, Display Name, Document Type, Audience, and Document Description have been completed.

After reviewing the information, select Save to store the document settings and begin the parsing process.

The system converts the uploaded document into text and divides the content into multiple smaller segment files.

Each segment is processed in sequence so that large manuals and books can be handled in controlled

stages.

For stability, the system processes up to seven segment files during a single parse cycle.

If more than seven segment files were created, the screen displays a Resume Document Parsing panel.

The Resume panel shows how many files have been processed, how many files remain, and an estimate of the time required to complete the remaining work.

Select Resume to continue processing the next group of segment files.

This process may need to be repeated several times for very large documents.

When all segment files have been parsed successfully, the system displays the Chunk Database Preparation panel.

Select Process for DB to create the Document, Source, and Chunk records in the database.

Chunking writes the parsed content into structured database records that can later be searched and retrieved.

After chunk processing is complete, the system displays the Vector Preparation panel.

Select Process for Vector to create semantic vectors for every chunk.

Vectoring allows the Chat AI Agent to locate related meaning even when the user does not use the exact words found in the document.

When vector processing is complete, the document is fully prepared for keyword search and Artificial Intelligence retrieval.

At that point, users can search the content, download the original file, and ask questions through the Chat AI Agent.

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](#)

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](#)

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](#)

60.000 - Parsing the File

Screen | 2026-05-16 14:39:45 TM_C140_S060

060.000 Parsing the File

Purpose

This section explains what occurs during the parsing stage and why this step is necessary before the document can be stored in the database.

Parsing is the process of sending each prepared text segment to the Artificial Intelligence engine for structured analysis.

During parsing, the system examines the document content and extracts clean, organized text suitable

for long term storage and retrieval.

The parser preserves headings, paragraphs, and business meaning while removing unnecessary artifacts that may have resulted from file conversion.

Large documents are processed in multiple segment files so that each request remains stable and manageable.

The system normally processes up to seven segment files during a single cycle.

If additional segment files remain, the Resume Document Parsing screen appears and the user selects Resume to continue with the next group of files.

This cycle repeats until all segment files have been processed successfully.

The parsing stage does not yet create searchable database chunks.

Instead, it produces a consolidated parsed result that is prepared for database commit.

When parsing is complete, the system displays the Chunk Database Preparation panel.

This confirms that the parsed content is ready to be written into the Document, Source, and Chunk tables.

Successful parsing is a critical step because it transforms raw converted text into structured content suitable for storage and retrieval.

Without parsing, the uploaded file cannot become part of the searchable and conversational knowledge base.

The screenshot shows a web interface for the 'Corporate Intelligence System'. At the top, there is a navigation bar with a 'Home' button and a help icon. Below this is a search bar with the placeholder text 'Ask for Help...' and a magnifying glass icon. To the right of the search bar, there are two input fields: 'Screen Name' and 'Description', both containing the text 'SN_IngestPDFDOCXRTF'. Below the search bar, there is a 'Chat with Me' button with a speech bubble icon. The main content area displays a status message in red text: '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.'

70.000 - Chunking the File

Screen | 2026-05-16 14:39:45 TM_C140_S070

070.000 Chunking the File

Purpose

This section explains how the parsed document is written into the database as individual chunks.

After all parsing has been completed successfully, the system displays the Chunk Database Preparation panel.

This panel confirms that the converted and parsed content is ready to be committed to the database.

Select Process for DB to begin the chunking process.

During this step, the system creates a Document record, one or more Source records, and a series of Chunk records containing the processed text.

Each chunk represents a manageable section of the document that can be searched, ranked, and retrieved independently.

Breaking the document into chunks allows the system to locate the most relevant portions of a large manual or book rather than returning the entire document.

Each chunk is stored together with important metadata such as document identity, source information, business domain, audience, and descriptive information.

The system also prepares each chunk for keyword generation and later vector processing.

Chunking is one of the most important architectural steps in the entire Corporate Intelligence System.

Without chunking, a large document would remain a single block of text that would be difficult to search and inefficient to use with Artificial Intelligence.

By dividing the document into smaller logical units, the system can identify and return only the portions that are most relevant to the user's question.

When chunk processing is completed successfully, the screen displays a confirmation message indicating that vectors may now be built.

The next step is to create vectors so the Chat AI Agent can retrieve related meaning as well as exact text matches.


Corporate Intelligence System

[Home](#)
?

Q

Screen Name

Description

[Chat with Me](#)

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](#)

80.000 - Vectoring the File

Screen | 2026-05-16 14:39:45 TM_C140_S080

080.000 Vectoring the File

Purpose

This section explains how vectors are created after the document has been successfully chunked into

the database.

When chunk processing is completed, the system displays the Vector Preparation panel and indicates that vectors may now be built.

Select Process for Vector to begin vector generation.

During this step, the system sends each chunk to the Artificial Intelligence provider and receives a numeric vector representation for that chunk.

A vector is a mathematical representation of the meaning of the text rather than simply the words that appear in the document.

This allows the system to locate related concepts even when the user asks a question using different terminology.

For example, a chunk discussing vacation benefits may still be found when the user asks about paid time off, annual leave, or employee time away.

Without vectors, retrieval depends more heavily on exact keyword matches and ranking based on text and metadata.

With vectors, the Chat AI Agent can identify semantically related chunks and provide more complete and accurate responses.

Each vector is stored in the database and associated with the corresponding chunk.

Vector generation may take several minutes for large documents containing hundreds or thousands of chunks.

When vector processing is complete, the document is fully prepared for advanced search and conversational retrieval.

At this point, users can ask questions through the Chat AI Agent and receive answers based on the newly loaded knowledge.

Corporate Intelligence System

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

[Chat with Me](#)

Screen Name

Description

Chunk processing completed successfully. You may now build vectors.

[File](#)
[Chat With Me](#)
[Books Chapters](#)
[Screens Documents](#)
[Procedure Documents](#)
[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

[Process for Vector](#)

90.000 - Confirming the Document Is Ready

Screen | 2026-05-16 14:39:45 TM_C140_S090

090.000 Confirming the Document Is Ready

Purpose

This section explains how to verify that a document has been fully processed and is ready for search and Chat AI retrieval.

After vector processing has completed successfully, the document has passed through every major stage of the ingestion pipeline.

The original source file has been uploaded and stored on the server.

The document information fields have been completed and saved.

The converted text has been parsed and, if necessary, resumed until all segment files were processed.

The parsed content has been written to the database as Document, Source, and Chunk records.

Semantic vectors have been created for every chunk.

At this point, the document is fully integrated into the Corporate Intelligence System.

You can confirm this by opening Search and List Documents and locating the newly loaded document.

You should be able to view the document information, review the stored metadata, and download the original file if needed.

You can also ask questions in the Chat AI Agent about the subject matter contained in the document.

If the Chat AI Agent returns accurate answers based on the uploaded material, the ingestion process has been completed successfully.

Large manuals, policies, books, and technical references can now serve as searchable and conversational organizational knowledge.

Once this process is understood, organizations can systematically convert existing files into a highly valuable and reusable intelligence asset.

150.000 - Loading Other Knowledge Types

10.000 - Loading Knowledge Notes

Screen | 2026-05-16 14:39:45 TM_C150_S010

010.000 Loading Knowledge Notes

Purpose

This section explains how to create and store Knowledge Notes for future search and Artificial Intelligence retrieval.

A Knowledge Note is used to capture durable business knowledge that does not already exist in a formal document.

Typical Knowledge Notes include rules, procedures, lessons learned, design decisions, definitions, standards, constraints, and important operational guidance.

Knowledge Notes are especially useful when an employee wants to preserve valuable information before it is forgotten or lost.

To create a Knowledge Note, open the SN_IngestKnowNote screen.

Unlike document-based ingestion, no file upload is required.

Instead, the information is entered directly into the Knowledge Note Text field.

Enter a meaningful Display Name that clearly identifies the content of the note.

Enter the Author, Date, and Subject if appropriate.

Select the appropriate Audience to control which users may access the note.

Select a Business Domain that best describes the subject area of the information.

Complete the Document Description with a clear explanation of what knowledge is being preserved, why it is important, and when it should be used.

Type the actual knowledge into the Knowledge Note Text area.

The text should focus on reusable business knowledge rather than temporary comments or casual conversation.

After reviewing the information, select Save.

When the note is saved, the system converts the entry into a structured document and prepares it for chunking, keyword extraction, and vector generation.

Because Knowledge Notes are normally concise, file segmentation and Resume processing are usually not required.

The system then creates database chunks and semantic vectors so the note becomes available to Search and the Chat AI Agent.

Knowledge Notes are one of the fastest and most effective ways to preserve critical business knowledge that might otherwise remain undocumented.

Corporate Intelligence System

Home ?

Ask for Help...

Q

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

Display Name

Author

Knowledge Note Text

Audience

Unassigned

Date

04/11/2026

Subject

Business Domain

Unassigned

Or enter custom Business Domain

Select from the list or type a custom Business Domain.

Document Description

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.

20.000 - Loading Emails

Screen | 2026-05-16 14:39:45 TM_C150_S020

020.000 Loading Emails Purpose

This section explains how to load email messages into the Corporate Intelligence System so they can be searched and used by the Chat AI Agent.

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Email messages often contain important decisions, instructions, technical guidance, and historical correspondence that should be preserved for future reference.

To load an email, open the SN_IngestEmail screen.

The system supports two methods of entry.

You may upload an EML file exported from your email system, or you may manually paste the email text directly into the Email Message Text field.

When an EML file is uploaded, the system automatically extracts information such as sender, recipient, subject, date, and message content.

If you enter the email manually, complete these fields yourself as appropriate.

Enter a meaningful Display Name that clearly identifies the email.

Review the Recipient, Sender, Subject, and Document Date fields.

Select the appropriate Audience and Business Domain.

Complete the Document Description with a detailed explanation of the purpose and significance of the communication.

The Document Description should explain why the email is important and what kinds of questions it should help answer in the future.

After reviewing the information, select Save.

Most emails are relatively short and normally do not require file segmentation or Resume processing.

If an email thread is unusually large, the system may divide the content into multiple processing segments.

After saving, the content is parsed, chunked into the database, and prepared for vector generation.

Once vectors have been created, the email becomes available to Search and the Chat AI Agent.

Loading important emails preserves communication history and makes key decisions and instructions available as searchable organizational knowledge.

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

Or enter custom 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

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.

30.000 - Loading Letters and Memos

Screen | 2026-05-16 14:39:45 TM_C150_S030

86

030.000 Loading Letters and Memos

Purpose

This section explains how to load business letters and memoranda into the Corporate Intelligence System so they can be searched and used by the Chat AI Agent.

Letters and memoranda often contain important communications, decisions, requests, approvals, and supporting explanations that should be preserved as organizational knowledge.

To load a letter or memo, open the SN_IngestLetter screen.

You may upload a PDF, DOCX, or RTF file containing the correspondence.

After the file is uploaded, review and complete the detail fields.

Enter a meaningful Display Name that clearly identifies the document.

Review the Recipient, Sender, Subject, and Document Date fields.

Select the appropriate Audience and Business Domain.

Complete the Document Description with a detailed explanation of the purpose and significance of the correspondence.

The Document Description should explain why the document is important and what types of future questions it should help answer.

After reviewing the information, select Save.

The system converts the file into text and begins the parsing process.

If the document is large, the content may be divided into multiple processing segments.

When more than seven segment files are created, the Resume Document Parsing screen appears and the user selects Resume until all segments have been processed.

After parsing is complete, the content is chunked into the database and semantic vectors are created.

Once processing is finished, the letter or memorandum becomes available to Search and the Chat AI Agent.

Loading letters and memoranda preserves important correspondence and makes organizational communications available for long term retrieval and analysis.

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

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

Customer Service

Business Domain

Or enter custom Business Domain

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.

40.000 - Loading Spreadsheets

Screen | 2026-05-21 00:00:00 TM_C150_S040

040.000 Loading Spreadsheets

Purpose

This section explains how to load spreadsheet files into the Corporate Intelligence System so they can be searched and used by the Chat AI Agent.

Spreadsheets often contain financial reports, budgets, schedules, inventories, operational listings, and other structured business data that should be preserved for future analysis and retrieval.

To load a spreadsheet, open the SN_IngestXLSX screen.

You may upload XLS or XLSX files.

After the file is uploaded, complete the detail fields.

Enter a meaningful Display Name that clearly identifies the spreadsheet.

Select the appropriate Audience and Business Domain.

Complete the Document Description with a detailed explanation of what the spreadsheet contains and how the information should be used.

The description should identify the purpose of the spreadsheet and the kinds of questions it should help answer.

After reviewing the information, select Save.

The system converts each worksheet into structured text that preserves worksheet names, column headings, and row data.

When column headings are detected, the headings are repeated throughout the converted text so that each chunk retains the context needed to interpret the data correctly.

Large spreadsheets may generate multiple processing segments and may require one or more Resume cycles to complete parsing.

After parsing is complete, the spreadsheet data is chunked into the database and semantic vectors are generated.

Once processing is finished, the spreadsheet becomes available to Search and the Chat AI Agent.

This allows users to ask questions about trends, balances, schedules, categories, and other structured business information contained in the workbook.

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.

Corporate Intelligence System

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

Upload

Allowed file types: PDF, DOCX, RTF

Uploaded File: MultiSheet_20260412_151547.xlsx

Save

Clear

Spreadsheet Guidance

Document Format

XLSX_DOCUMENT

Audience

Unassigned

Display Name

Business Domain

Unassigned

Document Description

Or enter custom Business Domain

Select from the list or type a custom Business Domain.

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.

50.000 - Loading Program Files

Screen | 2026-05-16 14:39:45 TM_C150_S050

050.000 Loading Program Files

Purpose

This section explains how to load program files into the Corporate Intelligence System so they can be searched and used by the Chat AI Agent.

Program files are among the most valuable forms of technical knowledge because they contain business logic, processing rules, calculations, validation routines, and architectural design decisions.

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To load program files, open the SN_IngestProgram screen.

You may upload source code files from many programming languages, including PHP, Python, JavaScript, Visual Basic, SQL, and related technical artifacts.

After the files are uploaded, complete the detail fields.

Enter a meaningful Display Name that clearly identifies the program or collection of programs.

Select the appropriate Audience and Business Domain.

Complete the Document Description with a detailed explanation of the purpose of the program, the business functions it performs, and the kinds of technical questions it should help answer.

The description should identify the operational role of the code and any important design considerations.

After reviewing the information, select Save.

The system converts the uploaded source code into structured text while preserving file names, comments, and program logic.

Large programs or collections of files may generate multiple processing segments and may require one or more Resume cycles to complete parsing.

After parsing is complete, the source code is chunked into the database and semantic vectors are generated.

Once processing is finished, developers and support personnel can search the code base and ask detailed questions through the Chat AI Agent.

This capability allows organizations to preserve technical knowledge, accelerate maintenance, and reduce dependence on individual programmers.



Corporate Intelligence System

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	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

Add New

▼

Apply Selection

Select

Press Select when done.

Select File

Choose File

No file chosen

Allowed file types: PDF, DOCX, RTF

Uploaded File: SN_IngestEmail_20260412_183301.php

Upload

Save

Clear

Program Guidance

Document Format

PROGRAM_DOCUMENT

Display Name

Program Unit Name

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

Audience

Unassigned

▼

Program Type

PHP

▼

Business Domain

Unassigned

▼

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.

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160.000 - Searching and Listing Documents

10.000 - Searching for a Loaded Document

Screen | 2026-05-16 14:39:45 TM_C160_S020

010.000 Searching for a Loaded Document

Purpose

This section explains how to locate documents that have already been loaded into the Corporate Intelligence System.

The Search and List Documents screen, program SN_DocList, is used to find previously ingested documents and download the original source files.

This screen is commonly used after loading a document to confirm that the ingestion process completed successfully.

It is also useful when you need to retrieve a previously loaded manual, policy, spreadsheet, email, knowledge note, or program file.

To search for a document, begin by selecting a Document Type from the Doc Type dropdown list.

You may search all document types or limit the search to a specific category such as PDF documents, Knowledge Notes, Emails, Letters, Spreadsheets, or Program Files.

The Any Text field searches descriptive information associated with the document.

This field is particularly useful when you know part of the Display Name, Document Description, Source Name, or File Name.

You may also enter a From Date and To Date to limit the search to documents uploaded during a specific time period.

After entering the desired criteria, select Search.

The lower portion of the screen displays all matching documents.

Each row shows the Document Type, Source Name, Display Name, Description, and File Name.

The Description field often contains detailed information that explains the purpose and contents of the document.

To retrieve a document, select the Download PDF button on the corresponding row.

The system transfers to the SN_DocView screen, where the original file can be opened or downloaded to your computer.

After reviewing or downloading the file, select Return on the SN_DocView screen to return automatically to the Search and List Documents screen.

This allows you to continue reviewing additional documents without repeating the search.

The Search and List Documents screen is an important administrative tool because it confirms that valuable business knowledge has been successfully stored and remains available for future use.

Once a document appears in this list, it is available for download, keyword search, and retrieval through the Chat AI Agent.



Corporate Intelligence System

HomeScreen Help ?

Q

Chat with Me

Screen Name

SN_DocList

Description

SN_DocList

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

Any Text

Cancel

From Date

To Date

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...	D00000062_Accounting and Financi
Download PDF	PDF_DOCUMENT	Comprehensive IT Security Policy	Comprehensive IT Security Policy	This document is a structured Comprehensive IT ...	D00000061_Comprehensive-IT-Sec
Download PDF	PDF_DOCUMENT	HR POLICY MANUAL	HR POLICY MANUAL	This document is a structured HR POLICY MANU ...	D00000060_HR-Guide_Policy-and-

170.000 - Best Practices for Better Search and Chat Results

10.000 - Use Clear Names

Screen | 2026-05-16 14:39:45 TM_C170_S010

010.000 Use Clear Names

Purpose

This section explains why clear and descriptive names are one of the most important factors in producing accurate search results and high quality Chat AI responses.

Every document, screen, procedure, knowledge note, email, spreadsheet, and program file should be given a meaningful name that immediately communicates its purpose.

Clear names help users locate information more quickly and help the Corporate Intelligence System understand what the content is about before any search or chat request is submitted.

A strong name should describe the subject matter using terms that employees are likely to search for.

Examples of effective names include Human Resources Policy Manual, Payroll Tax Table Load Process, Customer Support Escalation Procedures, and Disaster Recovery Checklist.

Vague names such as Miscellaneous Notes, General Information, Test Document, or Untitled provide little guidance to either users or the Artificial Intelligence engine.

When names are descriptive, they become valuable metadata that improves keyword generation, document classification, search ranking, and vector retrieval.

Good names also improve the readability of document lists, generated books, and online manuals.

When creating content, choose names that reflect the language used within your organization.

Include enough detail to distinguish the content from similar documents while keeping the name concise and easy to understand.

If a document addresses a specialized topic, include the key terms that users are most likely to search for.

Consistent naming conventions create a more organized knowledge base and significantly improve retrieval accuracy.

A few extra moments spent selecting a clear name can greatly increase the long term value of the information.

Well named documents are easier to find, easier to maintain, and more likely to produce precise and reliable Chat AI answers.

20.000 - Use Strong Descriptions

Screen | 2026-05-16 14:39:45 TM_C170_S020

020.000 Use Strong Descriptions

Purpose

This section explains why detailed and well written descriptions are one of the most effective ways to improve search accuracy and Chat AI responses.

The Document Description field provides business context that helps the Corporate Intelligence System understand what information is contained in the document and how that information should be used.

A strong description explains the purpose of the document, the major topics it covers, the intended audience, and the types of questions the content should help answer.

Descriptions should be written in complete business language rather than as a short label or title.

For example, instead of writing Payroll Manual, a stronger description would explain that the document contains payroll procedures, tax rules, direct deposit instructions, and year end reporting requirements.

This additional detail provides the system with valuable contextual clues before any keywords are generated or any vectors are created.

Descriptions are used during classification, keyword extraction, ranking, and final response preparation.

Well written descriptions often produce substantially better results than generic or incomplete descriptions.

Descriptions should focus on what the content contains, why it is important, and when it should be consulted.

They should include terminology that employees are likely to use when searching for information.

Taking the time to write a thoughtful description significantly increases the usefulness of the content for both search and conversational retrieval.

A strong description acts as a bridge between the raw document and the business meaning that users expect the system to understand.

Over time, consistently detailed descriptions become one of the most valuable forms of metadata in the entire knowledge base.

30.000 - Use Complete Content

Screen | 2026-05-16 14:39:45 TM_C170_S030

030.000 Use Complete Content

Purpose

This section explains why complete and well-developed content produces more accurate and more reliable search and Chat AI results.

The Corporate Intelligence System can only retrieve and explain information that has been captured in the underlying documents and knowledge sources.

If important facts, business rules, exceptions, or definitions are missing, the system will have less information available when responding to user questions.

For this reason, it is important to document the subject thoroughly rather than relying on short notes or incomplete summaries.

Complete content should explain not only what to do, but also why the process exists, when it applies, and what exceptions or special cases may occur.

Examples, definitions, calculations, and background explanations often provide valuable context that improves future retrieval.

When creating procedures, include all major steps, decision points, approvals, warnings, and expected outcomes.

When loading manuals and policies, ensure that the material is current and includes the information employees actually need to perform their work.

When capturing technical knowledge, preserve important design decisions, assumptions, and lessons learned.

Comprehensive content gives the system a richer foundation from which to identify relevant chunks and construct precise answers.

Detailed information also reduces the need for employees to search through multiple incomplete documents.

Although concise writing is desirable, completeness is more important than brevity when preserving organizational knowledge.

The goal is to create information that will remain useful months or years after it was originally written.

Well developed content increases the long term value of the knowledge base and leads to better and more dependable Artificial Intelligence responses.

40.000 - Avoid Duplicate and Conflicting Information

Screen | 2026-05-16 14:39:45 TM_C170_S040

040.000 Avoid Duplicate and Conflicting Information

Purpose

This section explains why duplicate and conflicting information can reduce the quality of search results and create confusion in Chat AI responses.

When multiple documents describe the same subject differently, the system may retrieve several competing explanations.

If those explanations disagree, users may receive inconsistent answers depending on which content is selected during retrieval.

For this reason, organizations should strive to maintain one authoritative source for each important

policy, procedure, rule, or technical standard.

When information changes, update the primary source rather than creating new documents that repeat the same material in slightly different forms.

Duplicate documents can also dilute search relevance by causing similar chunks to compete with one another.

This may reduce ranking precision and make it more difficult for users to identify the most current and reliable information.

Conflicting content can be especially problematic when documenting regulations, accounting rules, security policies, or technical procedures.

Before loading new information, determine whether a similar document already exists in the knowledge base.

If an authoritative version is already present, consider updating that source rather than adding another copy.

When historical versions must be retained, clearly identify which version is current and which versions are preserved for reference only.

Regular review and maintenance help keep the knowledge base accurate, organized, and trustworthy.

A well governed knowledge system emphasizes clarity, consistency, and a single source of truth whenever possible.

By reducing duplication and eliminating contradictions, organizations improve both search effectiveness and the reliability of Chat AI responses.

180.000 - Common User Mistakes and Troubleshooting

10.000 - Search Finds Nothing

Screen | 2026-05-17 14:23:34 TM_C180_S010

010.000 Missing or Weak Document Descriptions

Purpose

This section explains how missing or weak document descriptions can reduce the quality of search results and Chat AI responses.

The Document Description field provides important business context about the content being loaded into the Corporate Intelligence System.

If the description is blank, too short, or vague, the system has less information available when classifying the document and preparing it for retrieval.

A weak description such as Payroll Manual or Old Notes does not explain what the document contains or what questions it should help answer.

A stronger description explains the subject, intended audience, major topics, and business purpose of the document.

Good descriptions improve keyword generation, metadata interpretation, ranking, and Chat AI response quality.

When a search result or Chat AI answer seems weak, review the document description first.

If the description does not clearly explain the document, update the record with a stronger business explanation and reprocess the content if required.

Strong descriptions help the system understand why the information matters and when it should be retrieved.

20.000 - Chat Gives a Weak Answer

Screen | 2026-05-17 14:23:34 TM_C180_S020

020.000 Using Vague Names

Purpose

This section explains why vague names make documents harder to find and harder for the Chat AI Agent to interpret correctly.

Names appear in search results, document lists, online manuals, generated books, and AI retrieval context.

When a name is too general, users may not understand what the content contains.

Examples of weak names include Miscellaneous, General Notes, Test File, Old Document, and Information.

These names do not communicate the business purpose of the content.

Clear names should identify the subject and use the same terms that employees are likely to search for.

Examples of stronger names include Employee Leave Policy, Payroll Year End Checklist, Vendor Setup Procedure, and Spreadsheet Ingest Instructions.

When search results are confusing or difficult to evaluate, review the names assigned to the documents and sections.

Renaming content with clear and specific titles improves navigation, search quality, and Chat AI retrieval.

30.000 - A Book Section Is Out of Order

Screen | 2026-05-17 14:23:34 TM_C180_S030

030.000 Incomplete or Poor Quality Content

Purpose

This section explains how incomplete or poor quality content can limit the usefulness of search results and Chat AI responses.

The Corporate Intelligence System can only retrieve and explain information that has been captured in the knowledge base.

If a document omits important rules, steps, definitions, exceptions, or examples, the system may not have enough information to answer a question completely.

Poor quality content may include unfinished notes, unclear instructions, outdated procedures, missing headings, or copied text with formatting problems.

Before relying on search or Chat AI results, verify that the underlying content is accurate, complete, and current.

Good content should explain what the topic is, when it applies, how the work is performed, and what exceptions should be considered.

When a response is incomplete, the problem may not be the Chat AI Agent.

The problem may be that the supporting document does not contain enough detail.

Improving the original content often improves search performance and AI response quality immediately after the content is reprocessed.

40.000 - A Section Cannot Be Found

Screen | 2026-05-17 14:23:34 TM_C180_S040

040.000 Upload and Processing Errors

Purpose

This section explains common upload and processing problems that may occur when loading documents into the Corporate Intelligence System.

Upload problems may occur when no file is selected, the file type is not supported, the file is too large, or the browser blocks the upload.

Processing problems may occur during parsing, chunking, or vector generation.

If an upload fails, confirm that the file exists on your computer and that the file type is supported by the selected ingest screen.

If the file is too large, reduce the file size or use the ingest screen designed for large documents.

If parsing stops and a Resume option appears, select Resume to continue processing the next group of staged files.

Resume does not always mean that an error occurred.

It often means that the system processed the allowed number of segments and is waiting for the user to continue.

If chunk processing fails, do not continue to vector processing until the issue is corrected.

If vector processing fails, the chunks may exist in the database but semantic retrieval may not be fully ready.

When an error appears, read the message carefully and correct the source file, detail fields, or processing step before trying again.

50.000 - A Document Was Uploaded but Chat Does Not Use It

Screen | 2026-05-17 14:23:34 TM_C180_S050

050.000 Search Results Are Not What You Expected

Purpose

This section explains what to check when search results do not return the information you expected.

Search quality depends on the words used in the request, the names assigned to documents, the descriptions entered during ingestion, and the quality of the indexed content.

If search finds nothing, try a shorter search phrase or use different terms that may appear in the document.

If too many results appear, add more specific business terms to narrow the search.

If the wrong documents appear first, review whether the correct documents have clear names, strong descriptions, and complete content.

Search results may also be affected by security rules and audience settings.

If a user is not authorized to view certain content, that content may not appear in the results.

When expected information is missing, confirm that the document was successfully loaded, chunked, and vectored.

Also confirm that the document is active and assigned to the correct audience.

Improving names, descriptions, and source content usually improves search accuracy over time.

190.000 - Appendix A Screen Image Reference

10.000 - Introduction to the Screen Image Reference

Screen | 2026-05-17 14:48:06 TM_C190_S010

010.000 Introduction to the Screen Image Reference

Purpose

This appendix provides a consolidated visual reference for the major screens and images used throughout the Training Manual.

The purpose of this section is to help users quickly identify a screen by appearance and then connect that screen back to the chapter where it is discussed.

The images are grouped by subject area so users do not need to search through the entire manual to locate a visual example.

Each group contains one or more screen images followed by a short caption identifying the related Training Manual section.

The image file names follow the same naming convention used throughout the manual.

For example, TM_C150_S040 identifies the Training Manual image for Chapter 150 and Section 040.

This appendix is not intended to replace the instructional chapters.

Instead, it acts as a quick visual catalog that supports review, training, troubleshooting, and printed reference use.

When a user remembers what a screen looks like but does not remember where it was explained, Appendix A provides a fast way to locate the relevant image group.

The same image names are also useful for maintenance because they connect the manual text, screen records, and image library using one consistent structure.

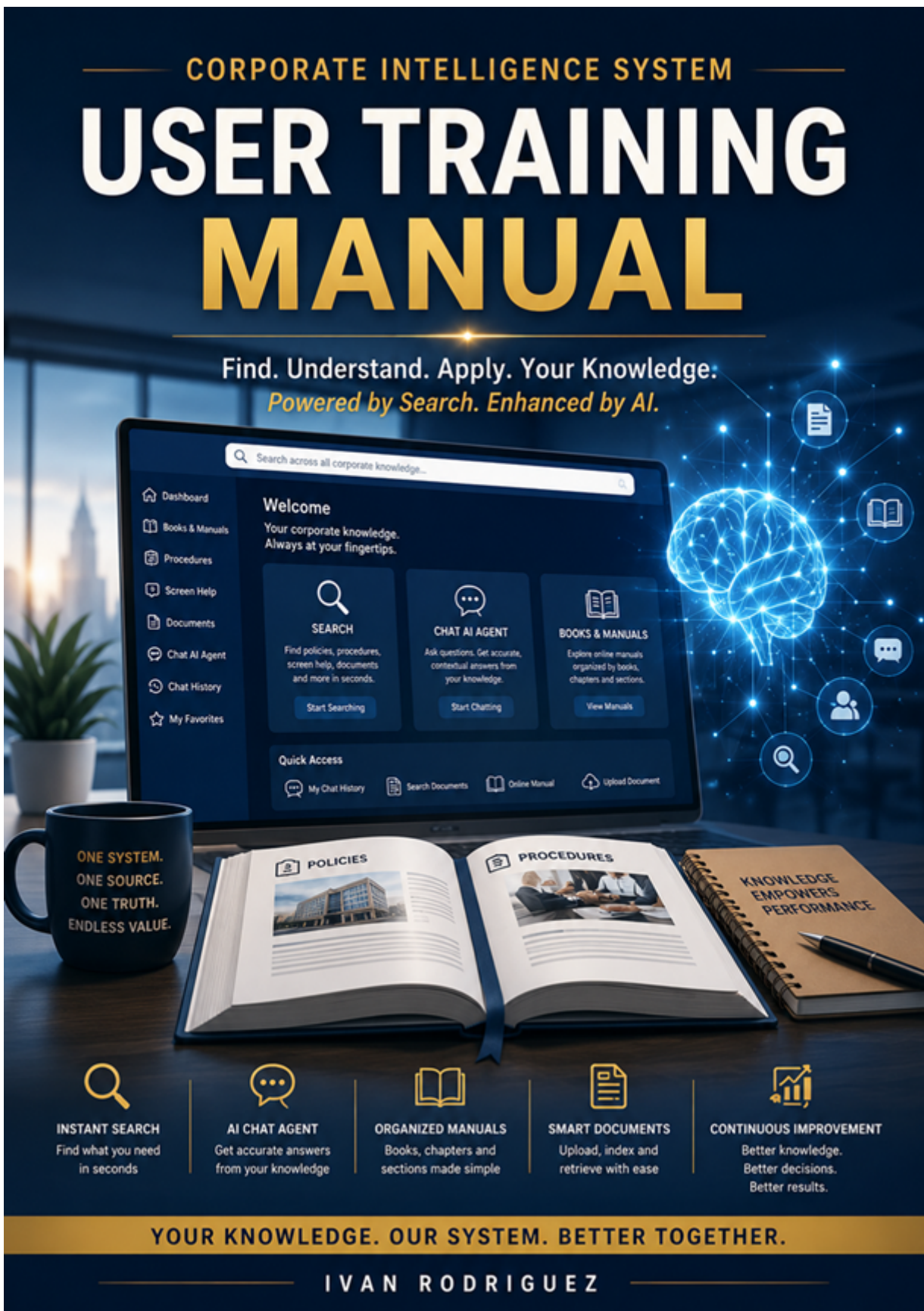
20.000 - Cover Illustration and Title Page Graphics

Screen | 2026-05-17 14:48:06 TM_C190_S020

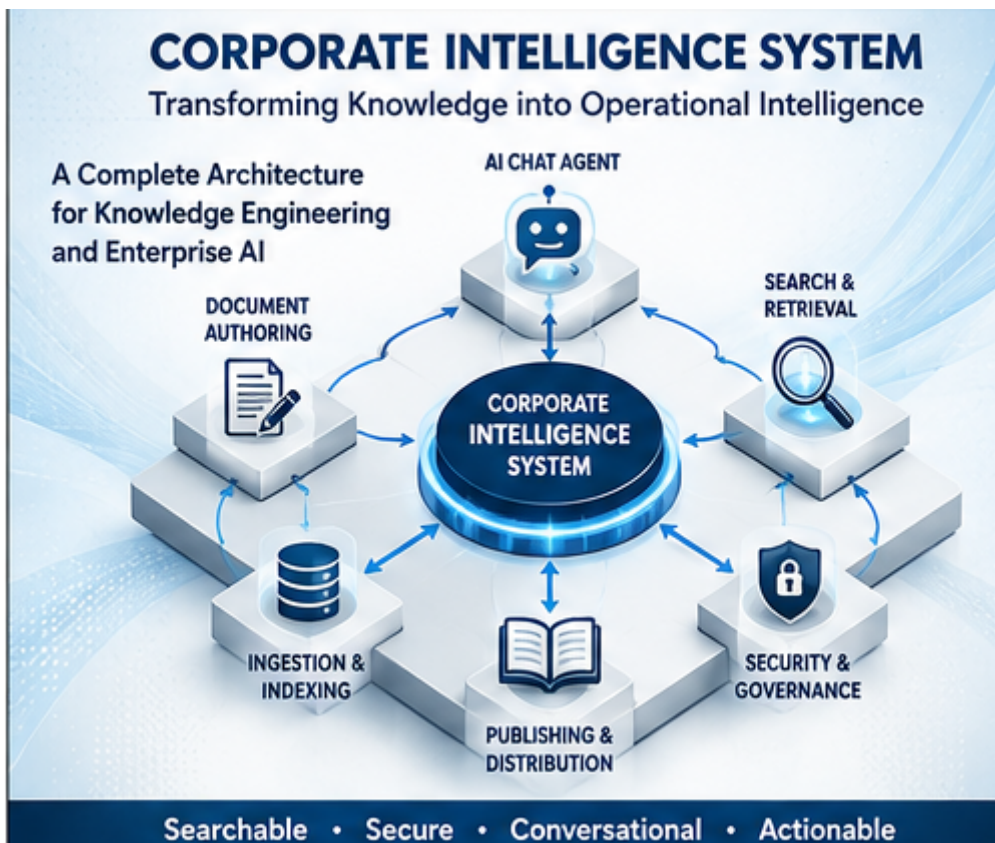
020.000 Cover Illustration and Title Page Graphics

Purpose

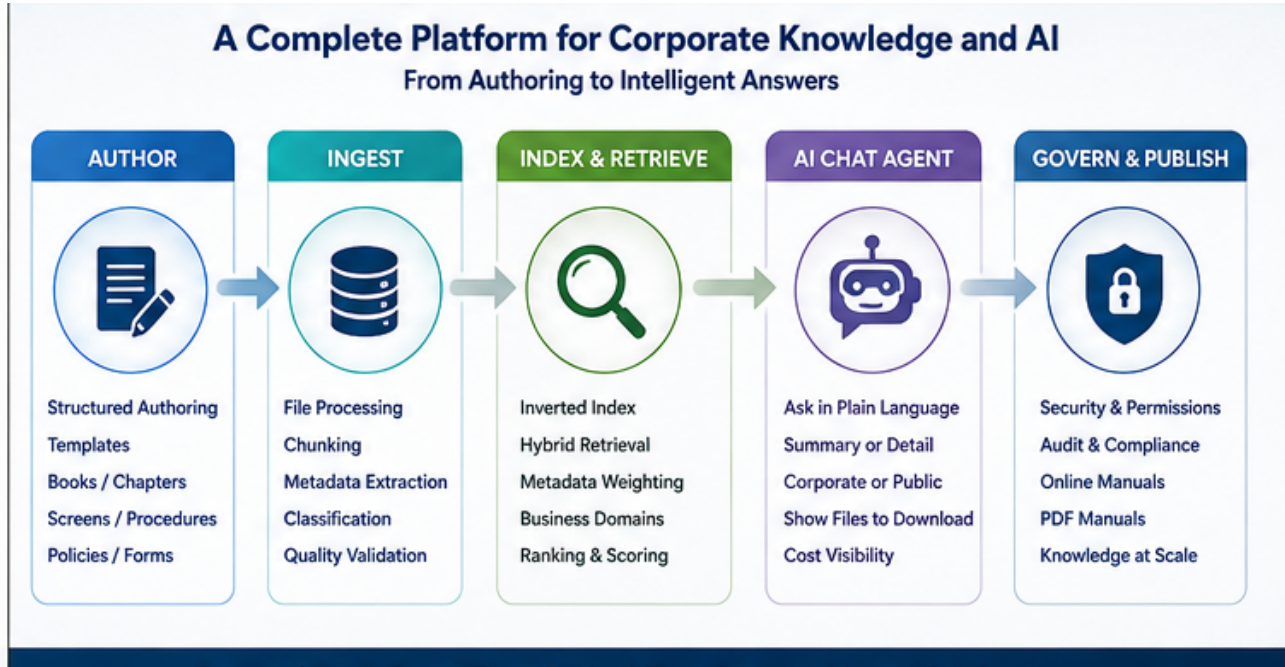
This section provides a visual reference for the opening graphics used at the beginning of the Training Manual.



TM_C010_S010 - Training Manual cover image.



TM_C010_S020 - Corporate Intelligence System overview image.



TM_C010_S030 - Basic user workflow image.

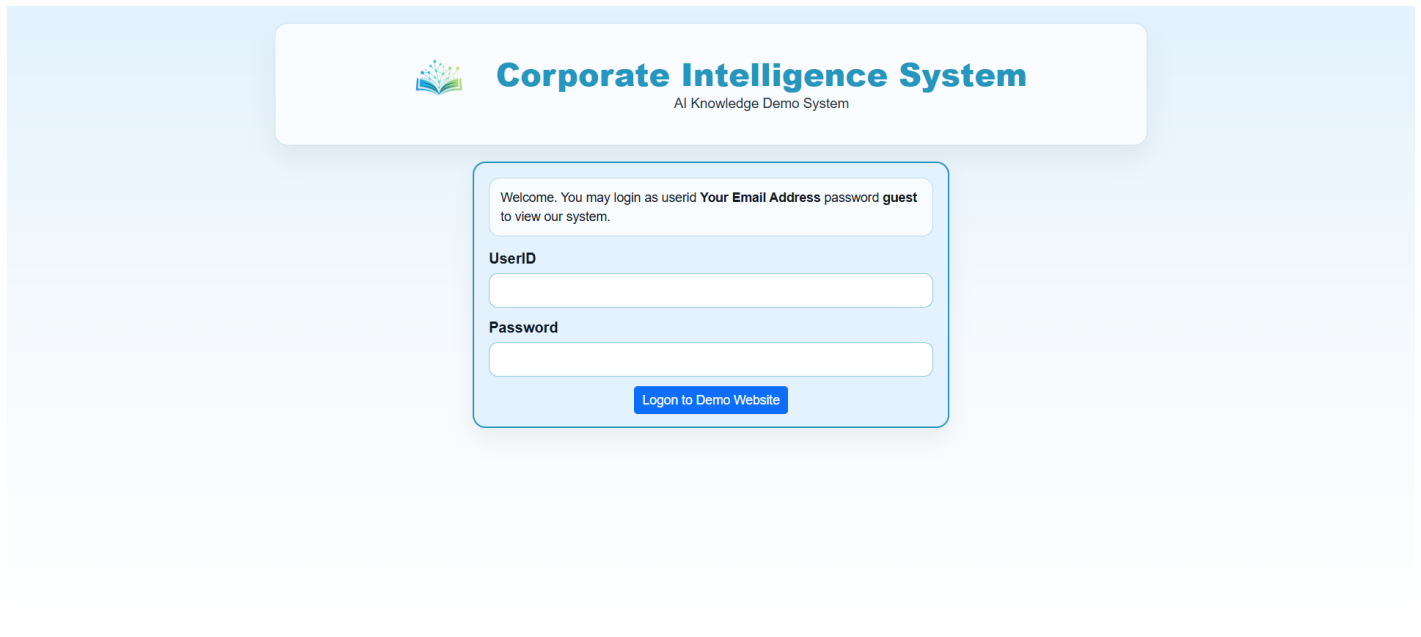
30.000 - Login and Security Screens

Screen | 2026-05-17 14:48:06 TM_C190_S030

030.000 Login and Security Screens

Purpose

This section provides a visual reference for the login screen used to begin a secure system session.



TM_C020_S010 - System Login screen used to enter a User ID and Password.

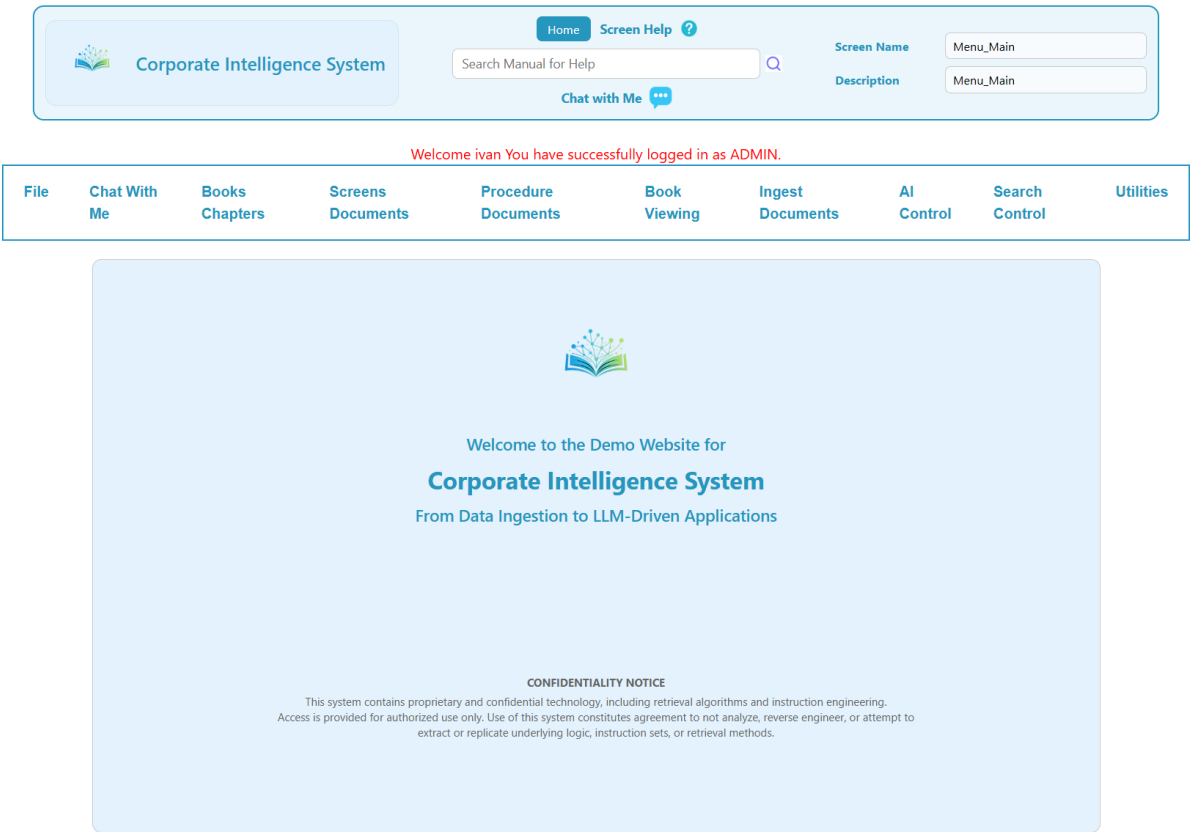
40.000 - Main Menu and Navigation Screens

Screen | 2026-05-17 14:48:06 TM_C190_S040

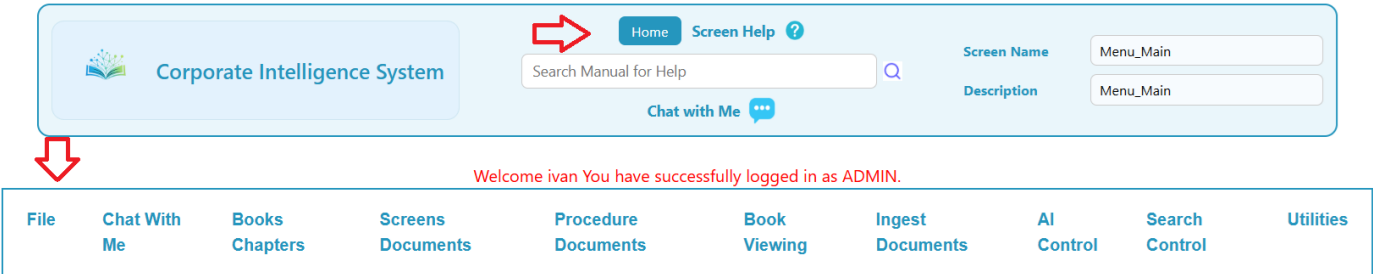
040.000 Main Menu and Navigation Screens

Purpose

This section provides a visual reference for the main navigation screens used after login.



TM_C020_S020 - System Main Menu showing the major navigation areas of the platform.



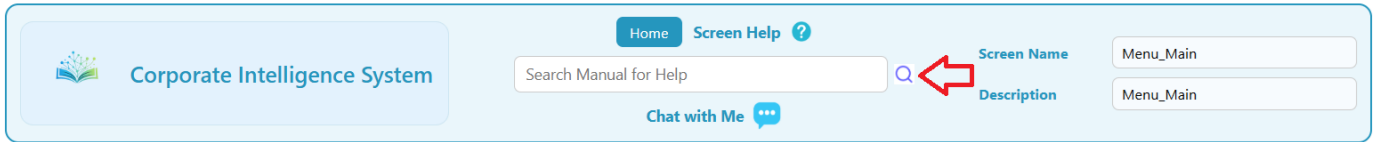
TM_C020_S030 - Navigation reference for returning home and ending the session.

50.000 - Global Search and Search Results Screens

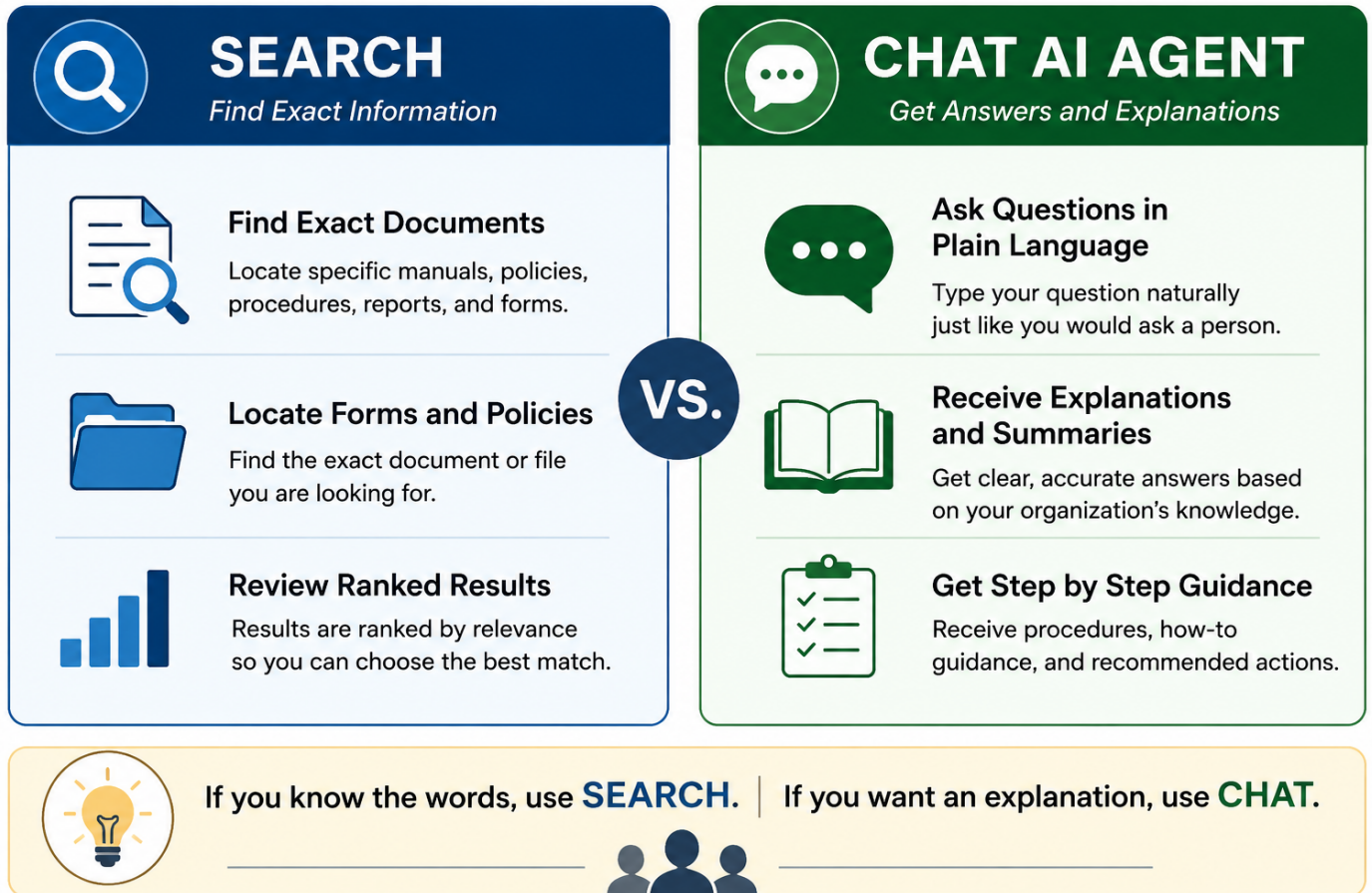
Screen | 2026-05-17 14:48:06 TM_C190_S050

050.000 Global Search and Search Results Screens
Purpose

This section provides a visual reference for the global search box and related search result screens.



TM_C030_S010 - Top search box used to search indexed corporate knowledge.



TM_C030_S020 - Search reference image used to compare search behavior with Chat AI use.

Training Manual

**Corporate Intelligence System**

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

[Chat with Me](#)

Screen Name

Description

File

Books
Chapters

Manuals

Screens
Documents

Procedure
Documents

Word
Control

Ingest
Documents

Chat
With Me

Other
Functions

Utilities

Admin

Search

Book

Limit

25

Search

7 results in 64 ms for 'Book' — page 1 of 1

Manage Book Titles

[View](#)

[SCR]

score 413.94

Document Name: SN_Book | DocID: 8 | Book: Operating Manual | Chapter: Managing Books and Chapters
Managing Books and Chapters > 100.000 Managing Book Titles
Last indexed: 2026-03-02 23:43:01

How to Create and Manage Books

[View](#)

[PROC]

score 325.24

Document Name: Creating Book Titles | DocID: 3 | Book: Operating Manual | Chapter: How to Create and Manage Books
How to Create and Manage Books > 0.000 How to Create and Manage Books
Last indexed: 2026-03-02 22:44:26

Overview of Managing Books Chapters Documents and

[View](#)

[PROC]

score 266.11

Document Name: A Overview of Books Chapters and Pages | DocID: 2 | Book: Operating Manual | Chapter: Overview of Managing Books Chapters Documents and
Overview of Managing Books Chapters Documents and > 0.000 Overview of Managing Books Chapters Documents and
Last indexed: 2026-03-02 22:17:44

Intro to Books Chapters Procedures and Screens Doc

[View](#)

[SCR]

score 162.62

Document Name: BookIntro | DocID: 7 | Book: Operating Manual | Chapter: Introduction
Introduction > 1.000 Intro To Books Chapters Procedures Documents
This informational document is located within the Operating Manual book and can be accessed through the Screen Documents menu under the assigned chapter and section number. Key fields include Book Name Chapter Number Chapter Name Section Nu...
Last indexed: 2026-03-02 23:29:55

How to Create Manage Chapters

[View](#)

[PROC]

score 12.37

Document Name: Creating Chapters | DocID: 4 | Book: Operating Manual | Chapter: How to Create Manage Chapters
How to Create Manage Chapters > 0.000 How to Create Manage Chapters
Last indexed: 2026-03-02 22:48:10

How to Create Procedures

[View](#)

[PROC]

score 11.13

Document Name: Creating Procedures | DocID: 5 | Book: Operating Manual | Chapter: How to Create Procedures
How to Create Procedures > 0.000 How to Create Procedures
Last indexed: 2026-03-02 22:51:57

How to Create Screens and Documents

[View](#)

[PROC]

score 8.66

Document Name: Create Screen Documents | DocID: 6 | Book: Operating Manual | Chapter: How to Create Screens and Documents
How to Create Screens and Documents > 0.000 How to Create Screens and Documents
Last indexed: 2026-03-02 22:56:21

TM_C030_S030 - Search results screen showing ranked matches.

7 results in 64 ms for 'Book' — page 1 of 1

Manage Book Titles

[View](#)

[SCR]

score 413.94

Document Name: SN_Book | DocID: 8 | Book: Operating Manual | Chapter: Managing Books and Chapters
Managing Books and Chapters > 100.000 Managing Book Titles
Last indexed: 2026-03-02 23:43:01

How to Create and Manage Books

[View](#)

[PROC]

score 325.24

Document Name: Creating Book Titles | DocID: 3 | Book: Operating Manual | Chapter: How to Create and Manage Books
How to Create and Manage Books > 0.000 How to Create and Manage Books
Last indexed: 2026-03-02 22:44:26

TM_C030_S040 - Search results screen reference for downloading documents.

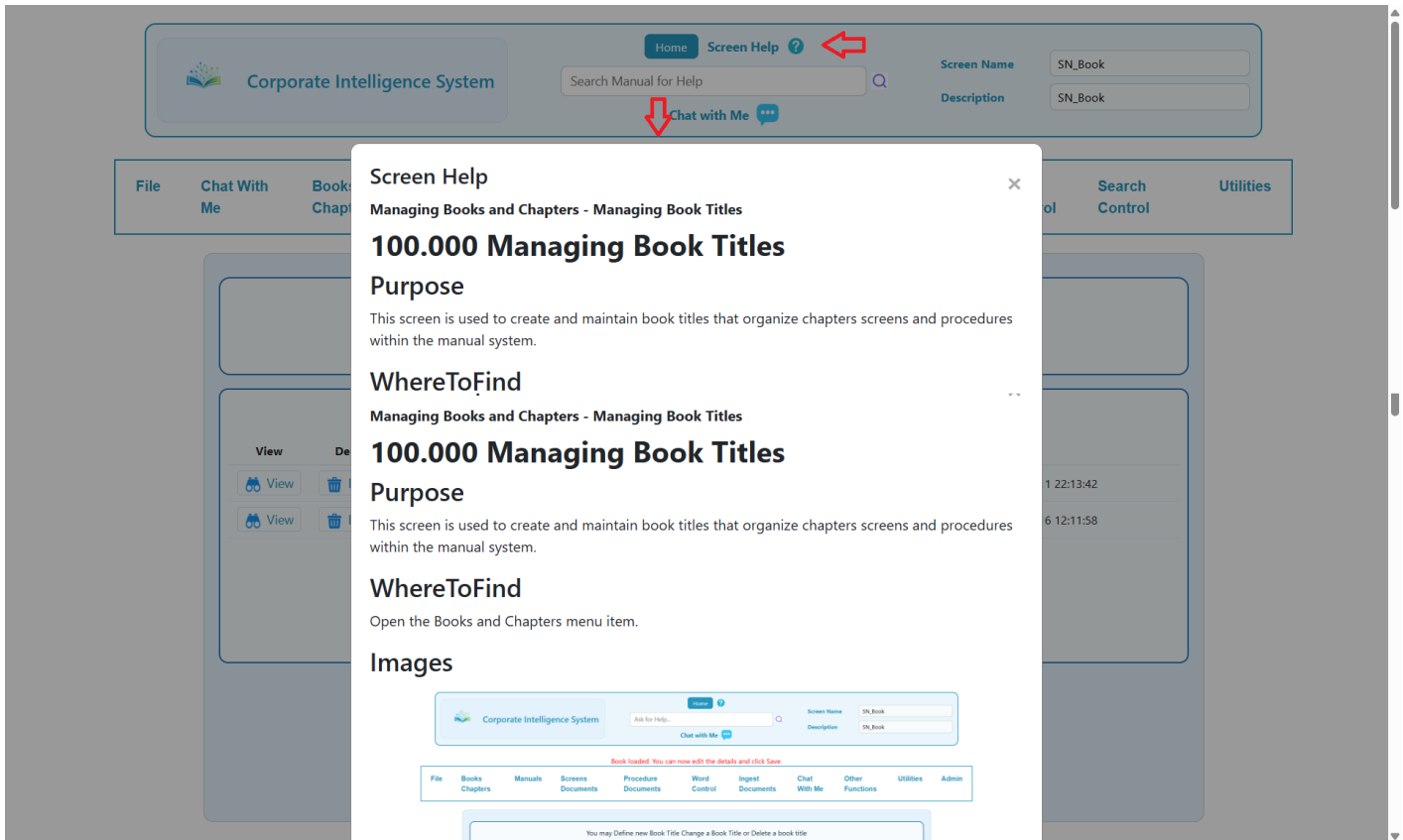
60.000 - Screen Help and Context Help Screens

Screen | 2026-05-17 14:48:06 TM_C190_S060

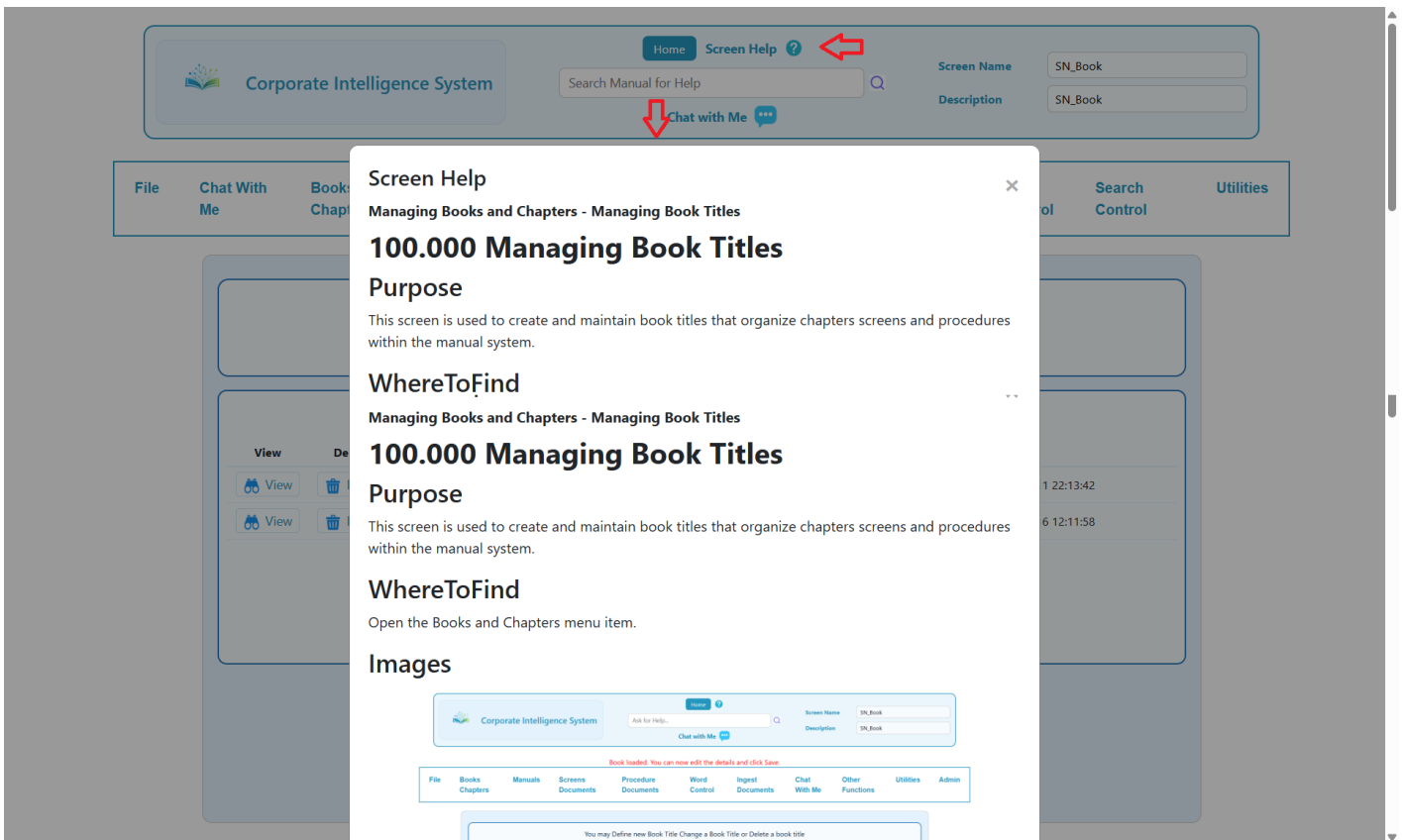
060.000 Screen Help and Context Help Screens

Purpose

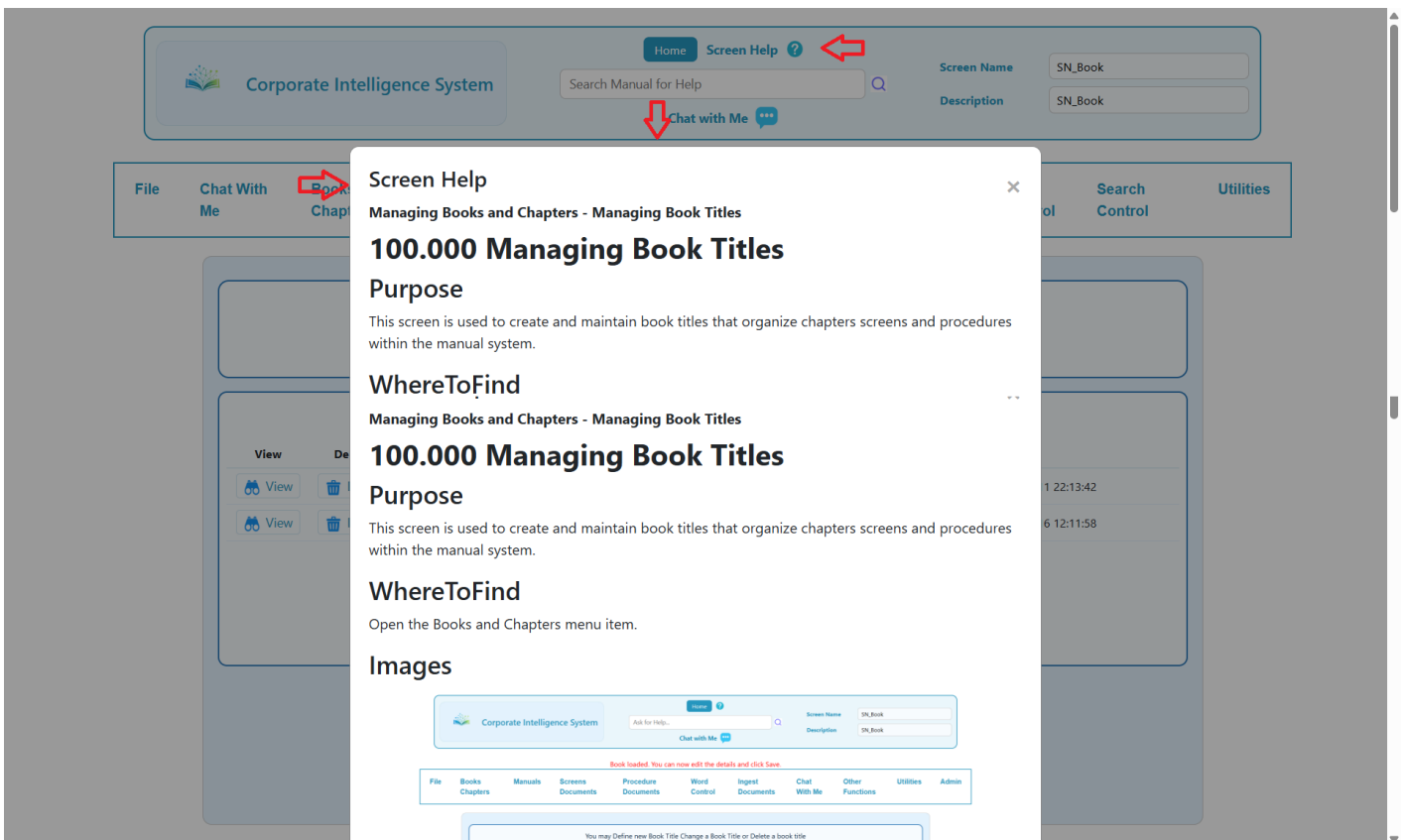
This section provides a visual reference for screen help and context help examples used throughout the Training Manual.



TM_C040_S010 - Screen Help reference showing how help supports the current screen.



TM_C040_S020 - Example showing help being opened from the active screen.



TM_C040_S030 - Example showing Screen Help used as a working reference.

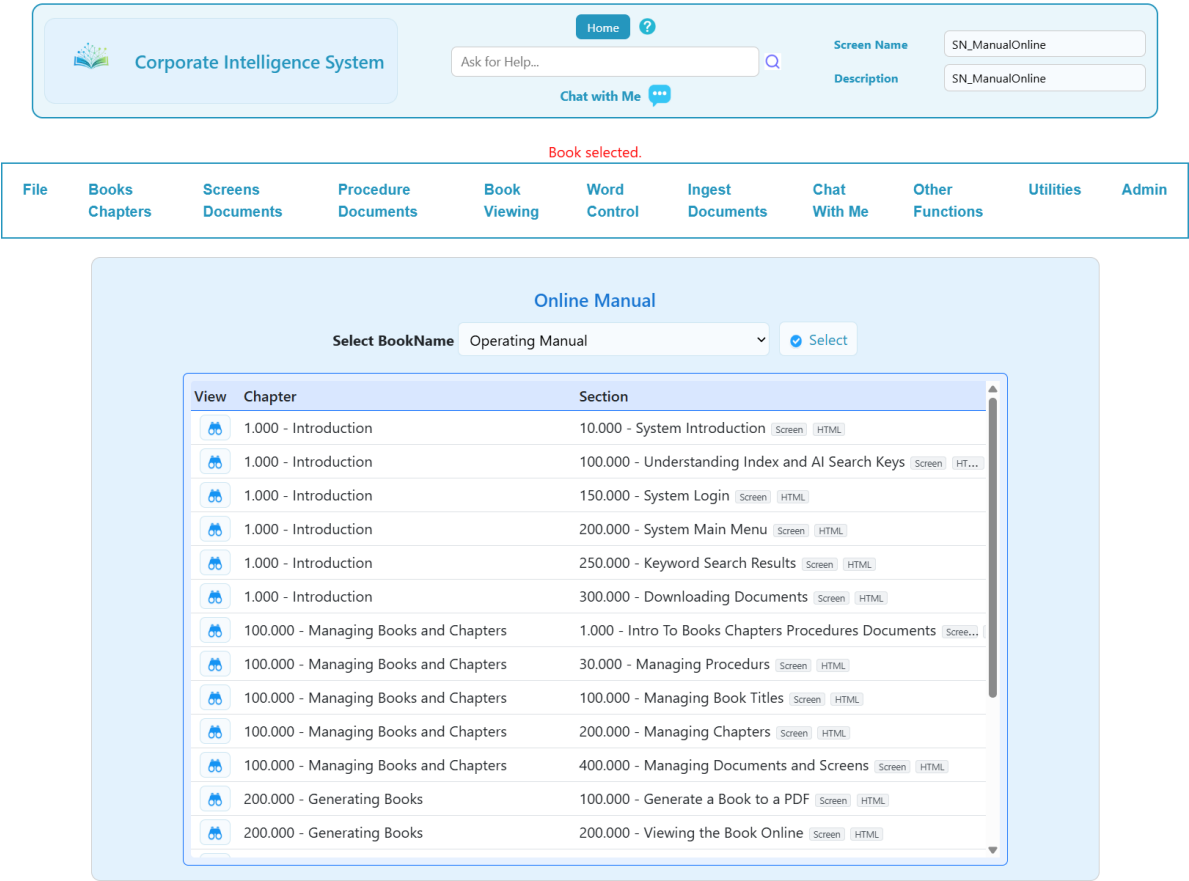
70.000 - Online Manual and Book Viewing Screens

Screen | 2026-05-17 14:48:06 TM_C190_S070

070.000 Online Manual and Book Viewing Screens

Purpose

This section provides a visual reference for viewing books and manuals online.



TM_C050_S010 - Online Manual reference showing book viewing concepts.

Training Manual



Corporate Intelligence System

Home ?

Ask for Help...

Chat with Me

Screen Name

SN_ManualOnline

Description

SN_ManualOnline

Book selected.

File

Books Chapters

Screens Documents

Procedure Documents

Book Viewing

Word Control

Ingest Documents

Chat With Me

Other Functions

Utilities

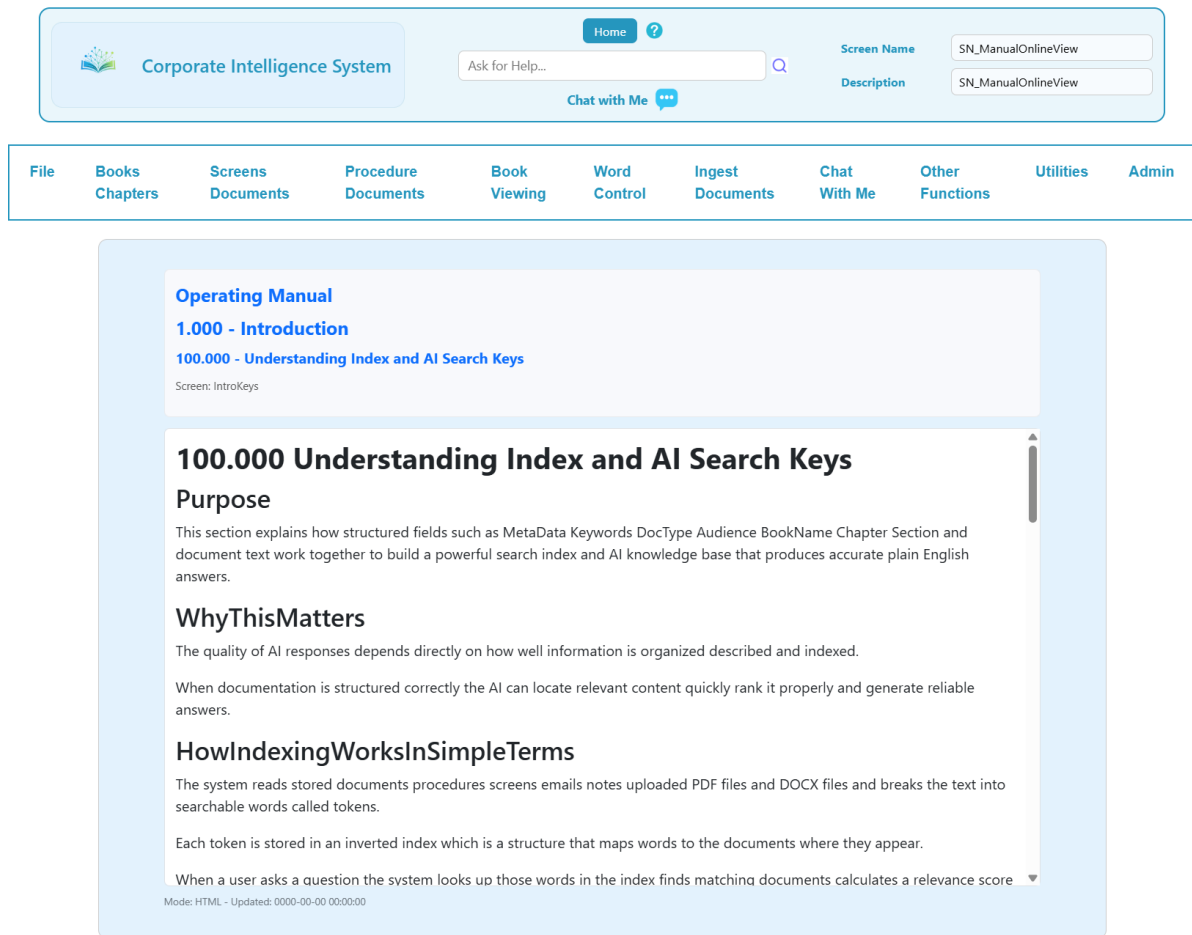
Admin

Online Manual

Select BookName Operating Manual Select

View	Chapter	Section
	1.000 - Introduction	10.000 - System Introduction Screen HTML
	1.000 - Introduction	100.000 - Understanding Index and AI Search Keys Screen HT...
	1.000 - Introduction	150.000 - System Login Screen HTML
	1.000 - Introduction	200.000 - System Main Menu Screen HTML
	1.000 - Introduction	250.000 - Keyword Search Results Screen HTML
	1.000 - Introduction	300.000 - Downloading Documents Screen HTML
	100.000 - Managing Books and Chapters	1.000 - Intro To Books Chapters Procedures Documents Scree...
	100.000 - Managing Books and Chapters	30.000 - Managing Procedurs Screen HTML
	100.000 - Managing Books and Chapters	100.000 - Managing Book Titles Screen HTML
	100.000 - Managing Books and Chapters	200.000 - Managing Chapters Screen HTML
	100.000 - Managing Books and Chapters	400.000 - Managing Documents and Screens Screen HTML
	200.000 - Generating Books	100.000 - Generate a Book to a PDF Screen HTML
	200.000 - Generating Books	200.000 - Viewing the Book Online Screen HTML

TM_C050_S020 - Screen used to select and open a book online.



TM_C050_S030 - Online manual view showing chapter and section navigation.

80.000 - Chat AI Agent Screens

Screen | 2026-05-17 14:48:06 TM_C190_S080

080.000 Chat AI Agent Screens

Purpose

This section provides a visual reference for the Chat AI Agent screens and conversation areas.

Corporate Intelligence System

Home Screen Help ?

Search Manual for Help

Chat with Me

Screen Name

Chat

Description

SN_Chat

File

Chat With Me

Books Chapters

Screens Documents

Procedure Documents

Book Viewing

Ingest Documents

AI Control

Search Control

Utilities

Active Chat: Employment Issues

\$0.3504

New Chat

Rename Chat

Optional Business Domain for Search:

Unassigned

Selected Business Domain:

Summary: Off

Copy Box: Off

Search Mode: DB Search Only

Show Files: Off

My Chats:

Chat History

Employment Issues

Message 3 - 04/25/2026 8:11 PM

User Request

Can i use my overtime and comp time or administrative leave

DB Stream Response

Based on the internal HR policy text provided:

1. Overtime / comp time

- Yes, the policy does allow overtime to be taken as banked time off rather than immediate pay.

- Overtime hours are banked at 1.5x.

- That time off must be taken at a time mutually agreeable to the ED/CEO and the employee.

- If the banked time is not used within 6 months, the employer will pay it out at 1.5x the employee's regular wage.

- Overtime must be authorized in advance, except in emergencies.

2. Leave / administrative leave

Public Stream Response

In general:

Type a command or request...

Send

☐ Summary
☐ Copy Box
☒ DB Search Only
☐ DB and Public Search
☐ Use Domain
☐ Show Files

Select Internal Command to Execute:

Select Command

Enter Line #:

Enter Line #

Command

1

2

3

TM_C060_S010 - Chat AI Agent main screen.

Corporate Intelligence System

Home Screen Help ?

Search Manual for Help

Screen Name Chat

Description SN_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: Employment Issues \$0.3504

New Chat

Rename Chat

Optional Business Domain for Search: Unassigned

Selected Business Domain:

Summary: Off
Copy Box: Off
Search Mode: DB Search Only
Show Files: Off

My Chats: Chat History Employment Issues

Message 3 - 04/25/2026 8:11 PM

User Request

Can i use my overtime and comp time or administrative leave

DB Stream Response

Based on the internal HR policy text provided:

1. Overtime / comp time

- Yes, the policy does allow overtime to be taken as banked time off rather than immediate pay.

- Overtime hours are banked at 1.5x.

- That time off must be taken at a time mutually agreeable to the ED/CEO and the employee.

- If the banked time is not used within 6 months, the employer will pay it out at 1.5x the employee's regular wage.

- Overtime must be authorized in advance, except in emergencies.

2. Leave / administrative leave

Public Stream Response

In general:

Can i use my overtime and comp time as Administrative Leave

Send

☐ Summary ☐ Copy Box ☒ DB Search Only ☐ DB and Public Search ☐ Use Domain ☐ Show Files

Select Internal Command to Execute: Select Command Enter Line #: Enter Line # Command

TM_C060_S020 - Chat input area used for asking clear questions.

Corporate Intelligence System

Home Screen Help ?

Search Manual for Help

Screen Name Chat

Description SN_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: Test Chat Thread \$1.2045

New Chat
Rename Chat
Optional Business Domain for Search: Human Resources
Selected Business Domain: HUMAN_RESOURCES
Summary: Off
Copy Box: Off
Search Mode: DB and Public Search
Show Files: On
Supporting Files: HR-Guide_Policy-and-Procedure-Template.pdf
My Chats: Chat History Test Chat Thread

Message 3 - 05/12/2026 4:38 PM

User Request
Can i use my overtime and comp time for administrative leave

DB Stream Response
Based on the internal HR chunks provided, I cannot confirm that you can use overtime or comp time for administrative leave.
What the internal material does say is:
1. The overtime/lieu time section says the Foundation may grant time off for hours worked beyond the standard work week.
2. The leave section lists emergency leave, personal leave, and medical/disability leave, and those leave types are described separately.
3. The leave material shown does not say that banked overtime, lieu time, or comp time can be applied to administrative leave.

Public Stream Response
In general, overtime, comp time, lieu time, and administrative leave are usually separate categories.

Can i use my overtime and comp time for administrative leave
Send

☐ Summary ☐ Copy Box ☐ DB Search Only ☒ DB and Public Search ☒ Use Domain ☒ Show Files

Select Internal Command to Execute: Select Command Enter Line #: Enter Line # Command

1 2 3 4 5 6 7 8 9 10 11

TM_C060_S030 - Chat response area showing generated answers.

REFINING A QUESTION

Each follow up question adds more detail and produces a more useful response.

STEP 1



General Question

"Tell me about vacation policy."

This question is too broad. The response may be general and not include the specific information you need.

STEP 2



More Specific Question

"How is unused vacation carried forward at year end?"

This question is more specific. The response will be more focused and relevant to your situation.

STEP 3



Detailed Request

"Explain the carryforward rules and provide examples."

This question is clear and targeted. The response will likely include complete details and useful examples.



Better Questions Lead to Better Answers

Provide clarity, include important details, and ask follow up questions. This helps the Chat AI Agent deliver the information you need.

TM_C060_S040 - Chat conversation showing follow up and refinement.

90.000 - Chat History and Conversation Navigation Screens

Screen | 2026-05-17 14:48:06 TM_C190_S090

090.000 Chat History and Conversation Navigation Screens

Purpose

This section provides a visual reference for Chat History and conversation review screens.

Corporate Intelligence System

HomeScreen Help ?

Search Manual for Help

Chat with Me

Screen Name

ChatHistory

Description

ChatHistory

File

Chat With Me

Books Chapters

Screens Documents

Procedure Documents

Book Viewing

Ingest Documents

AI Control

Search Control

Utilities

Chat History

Report has been processed. Press Download PDF. Download PDF

Chat Name

Add

Select User ID

ivan

Save

Search Archive

Any Text

Cancel

From Date

To Date

Search

Actions	UserID	ConversationID	ChatName	StartDate	LastDate	Input Tokens	Output Tokens	Total Tokens
SelectDeleteArchiveRun Report	ivan	1	Employment Issues	04/20/2026	04/25/2026	114709	4244	118953

TM_C070_S010 - Chat History screen used to review prior conversations.

Corporate Intelligence System

HomeScreen Help ?

Search Manual for Help

Chat with Me

Screen Name

ChatHistory

Description

ChatHistory

File

Chat With Me

Books Chapters

Screens Documents

Procedure Documents

Book Viewing

Ingest Documents

AI Control

Search Control

Utilities

Chat History

Report has been processed. Press Download PDF. Download PDF

Chat Name

Add

Select User ID

ivan

Save

Search Archive

Any Text

Cancel

From Date

To Date

Search

Actions	UserID	ConversationID	ChatName	StartDate	LastDate	Input Tokens	Output Tokens	Total Tokens
SelectDeleteArchiveRun Report	ivan	1	Employment Issues	04/20/2026	04/25/2026	114709	4244	118953

TM_C070_S020 - Chat History search and filtering reference.

Corporate Intelligence System

Home

Screen Help ?

Search Manual for Help

Q

Chat with Me

Screen Name

ChatHistory

Description

ChatHistory

File

Chat With Me

Books Chapters

Screens Documents

Procedure Documents

Book Viewing

Ingest Documents

AI Control

Search Control

Utilities

Chat History

Report has been processed. Press Download PDF.

Download PDF

Chat Name

Add

Select User ID

ivan

Save

Search Archive

☐

Any Text

Cancel

From Date

To Date

Search

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

TM_C070_S030 - Chat History reference for opening a prior conversation.

Corporate Intelligence System

Home

Screen Help ?

Search Manual for Help

Q

Chat with Me

Screen Name

ChatHistory

Description

ChatHistory

File

Chat With Me

Books Chapters

Screens Documents

Procedure Documents

Book Viewing

Ingest Documents

AI Control

Search Control

Utilities

Chat History

Report has been processed. Press Download PDF.

Download PDF

Chat Name

Add

Select User ID

ivan

Save

Search Archive

☐

Any Text

Cancel

From Date

To Date

Search

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

TM_C070_S040 - Chat History reference for cleanup and review.

100.000 - Chat Performance Report Screens

Screen | 2026-05-17 14:48:06 TM_C190_S100

100.000 Chat Performance Report Screens

Purpose

This section provides a visual reference for Chat Performance Report screens.

Chat Performance Report - User ivan Conversation 1

Chat Performance Evaluator

User: ivan | Conversation: 1 | Chat: Employment Issues
Generated: 2026-04-26 20:32:03
Report Mode: Level 1 Diagnostic / Performance Evaluator

Chat Session Summary

Item	Value
UserID	ivan
ConversationID	1
ChatName	Employment Issues
StartDate	2026-04-20 10:54:14
LastDate	2026-04-25 20:12:00
ActiveSw	Y
SessionInputTokens	114709
SessionOutputTokens	4244
SessionTotalTokens	118953

TM_C080_S010 - Chat Performance reference for understanding why performance matters.

Corporate Intelligence System

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

Screen Name: ChatHistory

Description: ChatHistory

[Chat with Me](#)

[File](#)
[Chat With Me](#)
[Books Chapters](#)
[Screens Documents](#)
[Procedure Documents](#)
[Book Viewing](#)
[Ingest Documents](#)
[AI Control](#)
[Search Control](#)
[Utilities](#)

Chat History

Report has been processed. Press Download PDF. [Download PDF](#)

Chat Name: [Add](#)

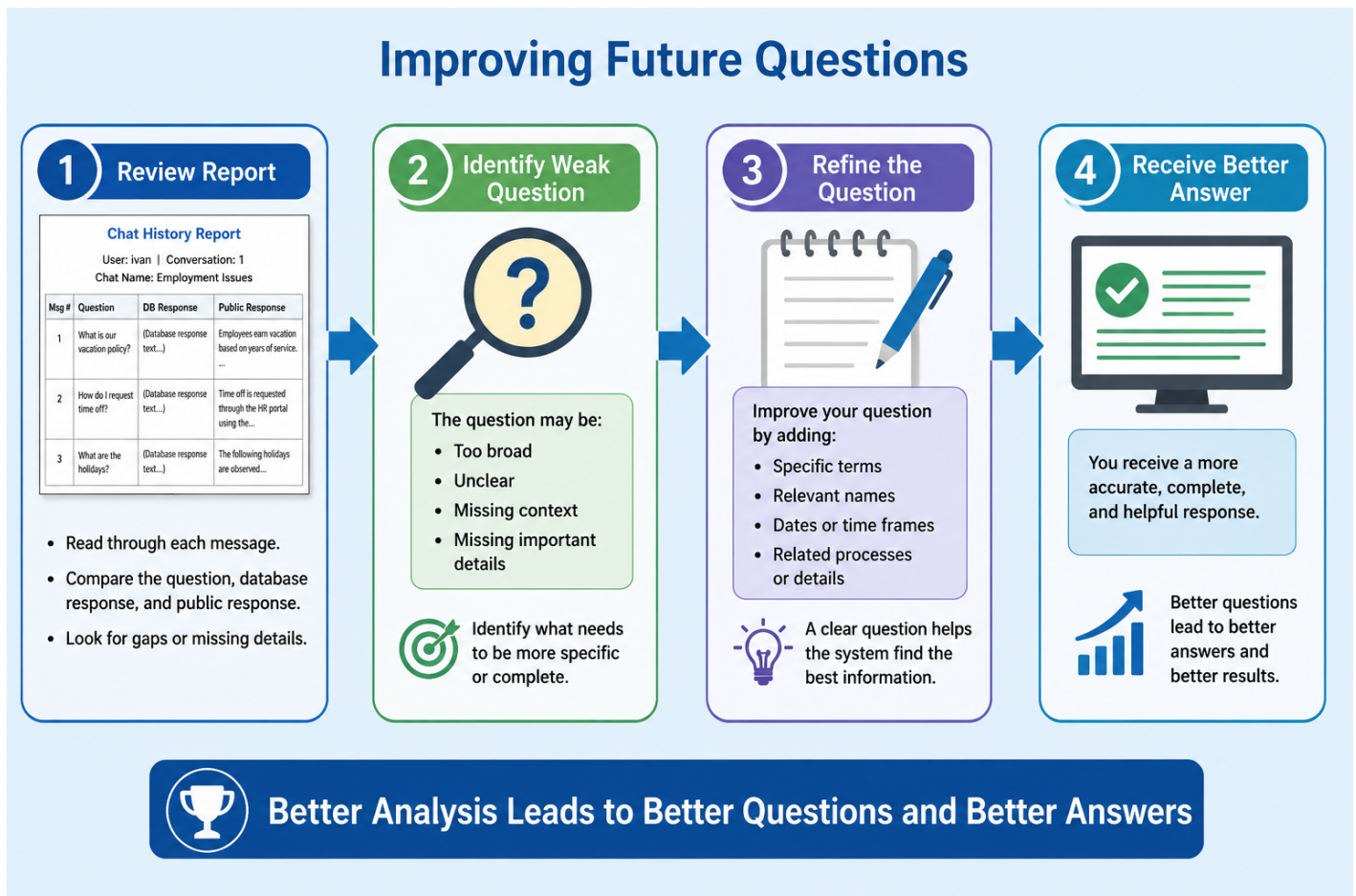
Select User ID: [Save](#)

Search Archive: ☐ Any Text: [Cancel](#)

From Date: To Date: [Search](#)

Actions	UserID	ConversationID	ChatName	StartDate	LastDate	Input Tokens	Output Tokens	Total Tokens
Select Delete Archive Run Report	ivan	1	Employment Issues	04/20/2026	04/25/2026	114709	4244	118953

TM_C080_S020 - Chat Performance Report screen used to run an analysis.



TM_C080_S040 - Chat Performance reference used to improve future questions.

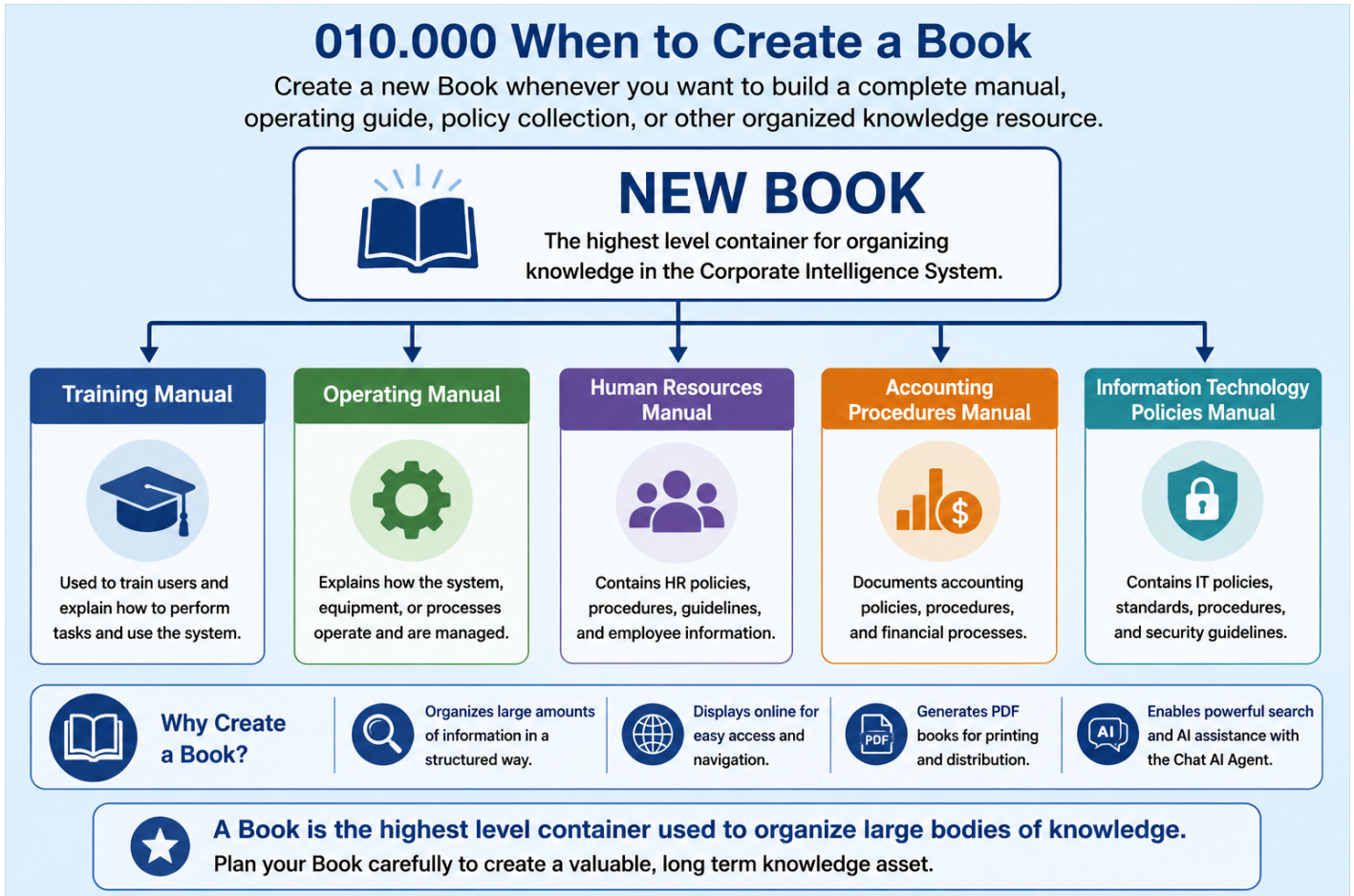
110.000 - Book Title Maintenance Screens

Screen | 2026-05-17 14:48:06 TM_C190_S110

110.000 Book Title Maintenance Screens

Purpose

This section provides a visual reference for book title maintenance screens.



TM_C100_S010 - Book maintenance reference explaining when to create a book.

Corporate Intelligence System

[Home](#) ?

Ask for Help...

Q

[Chat with Me](#) 💬

Screen Name

Description

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

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

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

View
Delete
BookNumber
BookName
Editor
LastDate

+ Add
←

🔍 View ↑	🗑️ Delete	1,000	Operating Manual	ivan	2026-02-25 17:52:35

BookNumber

→

Save
Cancel

BookName

↑

TM_C100_S020 - Book Title screen used to create the book record.

030.000 Book Naming Best Practices

Choose clear and descriptive Book Names that accurately describe the content and are meaningful to your audience.

POOR BOOK NAMES

Vague, unclear, and not helpful



Miscellaneous Notes

Too vague. Does not tell users what the manual contains.



General Information

Too broad. Does not describe a specific subject.



Other Topics

Unclear and unhelpful. Not meaningful to users.

USE CLEAR
AND DESCRIPTIVE
NAMES

GOOD BOOK NAMES

Clear, descriptive, and helpful



Training Manual

Clearly describes the content and the purpose.



Operating Manual

Specific and meaningful to users.



Human Resources Manual

Clearly communicates the subject area.



Accounting Procedures Manual

Describes the exact area covered in the manual.



Clear Book Names improve organization, search, and Artificial Intelligence retrieval.

A well chosen Book Name makes the manual easier to understand and more valuable as a long term knowledge asset.

TM_C100_S030 - Book Title reference supporting good book naming practices.

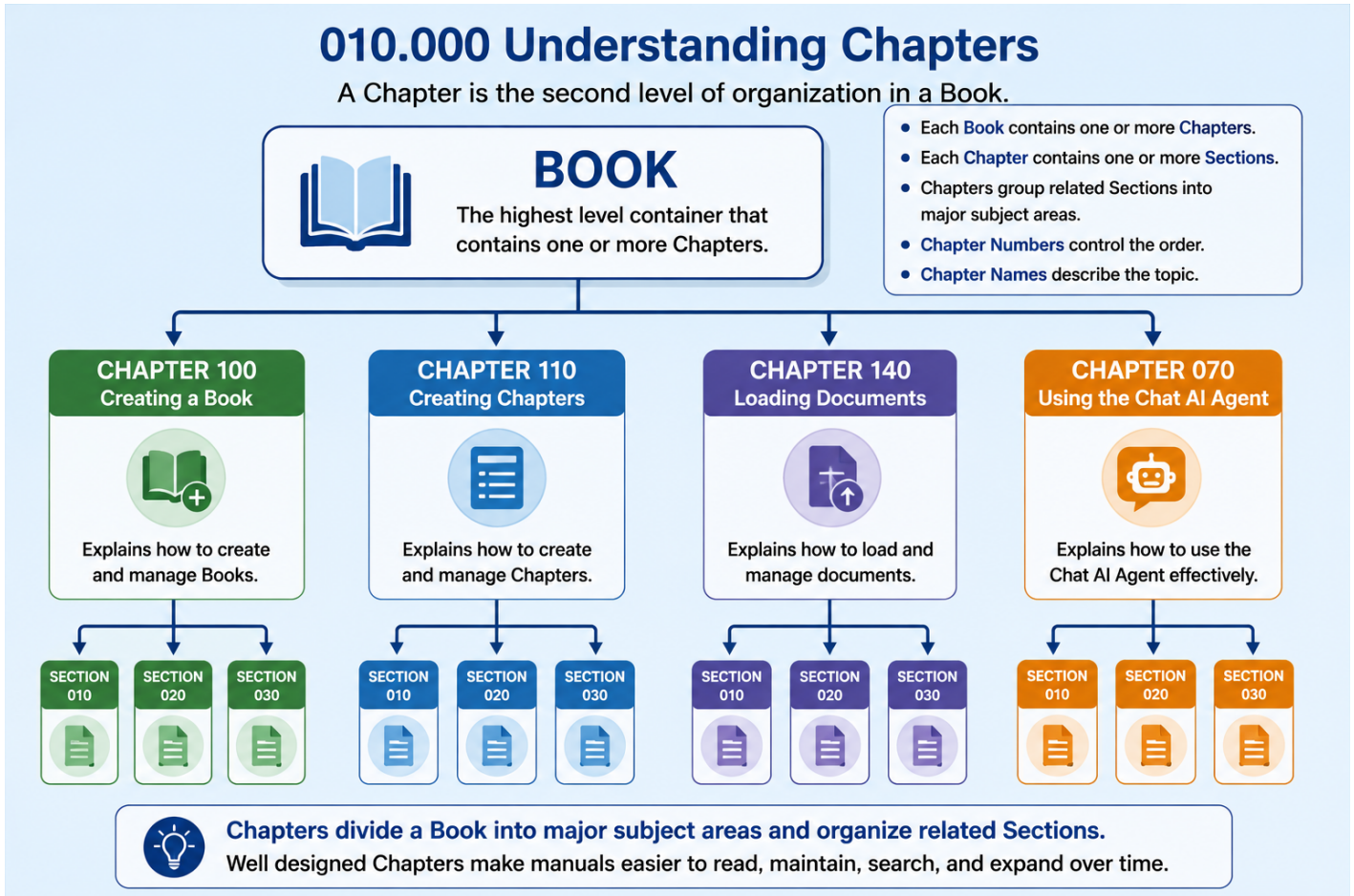
120.000 - Chapter Maintenance Screens

Screen | 2026-05-17 14:48:06 TM_C190_S120

120.000 Chapter Maintenance Screens

Purpose

This section provides a visual reference for chapter maintenance screens.



TM_C110_S010 - Chapter maintenance reference explaining when to create a chapter.

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 Select

View Delete

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...

TM_C110_S020 - Chapter screen used to create a chapter record.

030.000 Choosing Effective Chapter Names

Choose clear and descriptive Chapter Names that accurately identify the major subject area covered by the Chapter.

POOR CHAPTER NAMES

Vague, unclear, and not helpful

Miscellaneous Topics

Too vague. Does not tell readers what the chapter covers.

General Information

Too broad. Does not describe a specific subject area.

Other Subjects

Unclear and unhelpful. Not meaningful to readers.

USE CLEAR AND DESCRIPTIVE NAMES

GOOD CHAPTER NAMES

Clear, descriptive, and helpful

Creating a Book

Clearly identifies the major topic of the chapter.

Loading Documents

Clearly describes the subject covered in the chapter.

Using the Chat AI Agent

Specific and meaningful to readers.

Searching the Knowledge Base

Describes the exact area covered in the chapter.

Clear Chapter Names improve navigation, search, and Artificial Intelligence retrieval.

A well chosen Chapter Name makes the manual easier to understand and easier to maintain over time.

127

TM_C110_S030 - Chapter numbering reference showing why sorting matters.

040.000 Selecting Proper Chapter Numbers

Chapter Numbers determine the order in which Chapters appear in the manual, PDF books, and table of contents.

The system sorts Chapters by Chapter Number in ascending order.

NEW CHAPTER ADDED →

EXAMPLE CHAPTER ORDER

010.000	Introduction	
020.000	Login and Security	
025.000	New Chapter (Inserted)	
030.000	Search and Help	
040.000	Chat AI Agent	
050.000	Books and Chapters	

WHY INCREMENTS OF 010.000?

Using increments of 010.000 leaves space to insert new Chapters without renumbering.

EXAMPLE

To insert a new Chapter between

020.000

and

030.000

↓

025.000

New Chapter

- Chapter Numbers should reflect the logical flow of the manual.
- Proper numbering improves navigation, maintenance, and long term growth.

Using increments of 010.000 leaves room for future Chapters.

Plan ahead to maintain the correct order and provide flexibility for growth.

TM_C110_S040 - Chapter naming reference supporting good chapter names.

130.000 - Screen Document Maintenance Screens

Screen | 2026-05-17 14:48:06 TM_C190_S130

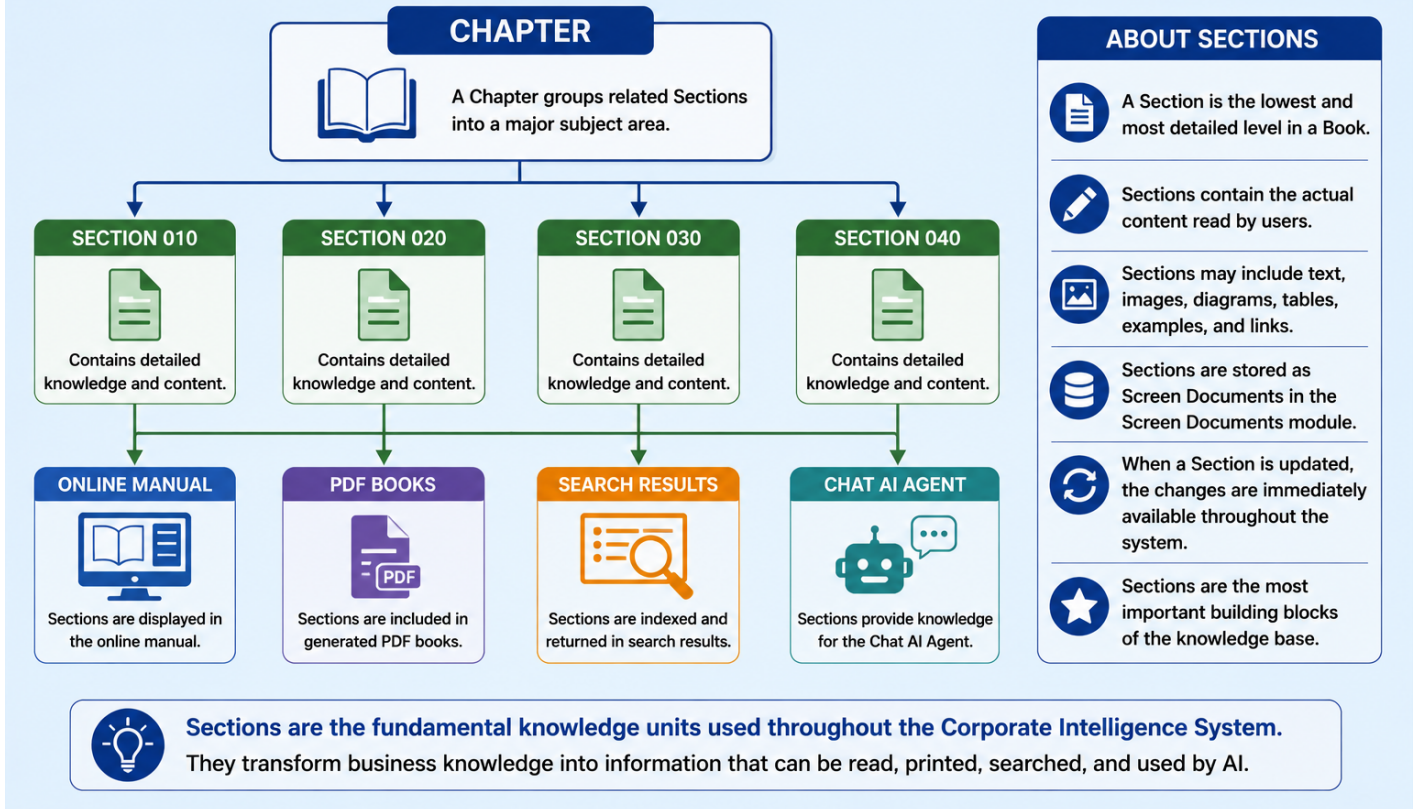
130.000 Screen Document Maintenance Screens

Purpose

This section provides a visual reference for screen document maintenance screens.

010.000 Understanding Book Sections

Sections are the lowest level of content and contain the detailed knowledge.



TM_C120_S010 - Screen Document reference explaining what a screen document is.

Corporate Intelligence System

Ask for Help...

Chat with Me

Home ?

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

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>
```

TM_C120_S020 - Screen Document reference showing why Screen Name must be unique.

Corporate Intelligence System

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></div>

TM_C120_S030 - Screen Document reference showing why Section Name matters.

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Corporate Intelligence System

[Home](#)
?

Screen Name
SN_Screen

Description
SN_Screen

Q

[Chat with Me](#)
...

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:

Src>

Search
+ Add

Save
Cancel

Book Name:

Screen Name:

Security Group Number:

Screen Description:

Doc Type:

Audience:

Chapter Name:

Section Number:

Section Name:

Help Mode:

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>

TM_C120_S040 - Screen Document maintenance screen used to create a section.

140.000 - Procedure Document Maintenance Screens

Screen | 2026-05-17 14:48:06 **TM_C190_S140**

140.000 Procedure Document Maintenance Screens Purpose

This section provides a visual reference for procedure document maintenance screens.

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>Procedure Name Overview of Books Chapters and Pages</h2>
<h3>Book Name</h3>
<p>Operating Manual</p>
<h3>Procedure Category</h3>
<p>Managing Books</p>
</div>

TM_C130_S010 - Procedure document reference explaining what a procedure is.

Corporate Intelligence System

Home

Screen Help ?

Search Manual for Help

Q

Screen Name

SN_Procedures

Description

SN_Procedures

Chat with Me

File

Chat With Me

Books Chapters

Screens Documents

Procedure Documents

Book Viewing

Ingest Documents

AI Control

Search Control

Utilities

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

Chat Agent Procedures

✓

Managing Books

✓

Managing KeyWords

✓

Managing Stop Words

✓

Managing...

Chat Agent Procedures

+Add

Delete

Procedures

Procedure	Description	Actions
Chat History for the Average User	Your Chat History	
Performance Evaluation	Procedure for Chat Performance Evaluation	
Procedure for Using Chat Agent	Chat Agent Step by Step	

Selected

Srch>

Q

Search

+

Add

TM_C130_S020 - Procedure screen used to create a procedure.

```
<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>
```

TM_C130_S030 - Procedure writing reference showing where procedure steps are entered.

SaveCancel

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

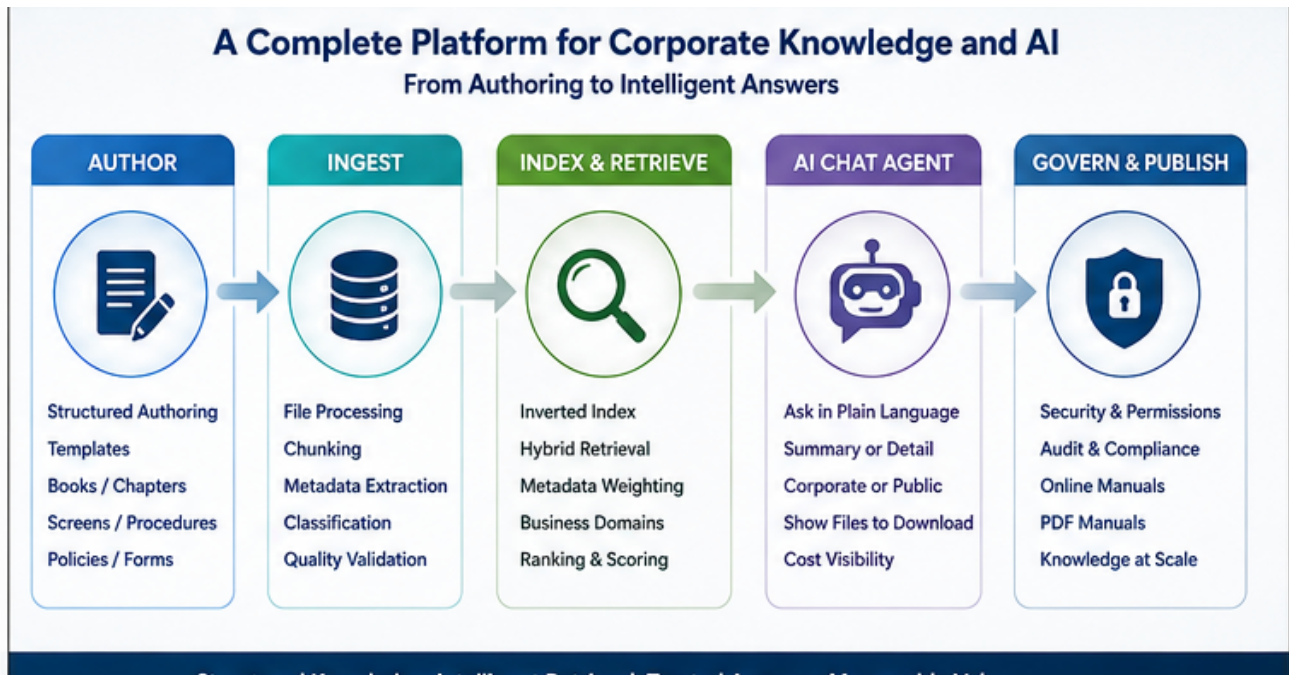
TM_C130_S040 - Procedure reference for names and categories.

150.000 - PDF DOCX RTF Document Ingestion Screens

Screen | 2026-05-17 14:48:06 TM_C190_S150

150.000 PDF DOCX RTF Document Ingestion Screens Purpose

This section provides a visual reference for PDF, DOCX, and RTF document ingestion screens.



TM_C140_S010 - Document ingestion overview for large source files.

Training 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	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

Add New

Apply Selection

Select

Press Select when done.

Select File

Choose File

No file chosen

Allowed file types: PDF, DOCX, RTF

Uploaded File: bcsd_sop_08-16-16_20260403_171315.pdf

Upload

Save

Clear

API Guidance

Document Format	PDF_DOCUMENT	Document Mode	Unassigned
Expected Class	Unassigned	Audience	Unassigned
Display Name		Page Count	
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 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.

TM_C140_S020 - File preparation and upload reference.

Save

Clear

API Guidance

Document Format	PDF_DOCUMENT	Document Mode	Manual
Expected Class	Manual	Audience	Both
Display Name	City Standard Operating Manual	Page Count	120
	Operations		
Business Domain	Or enter custom Business Domain		
	Select from the list or type a 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. 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.		

TM_C140_S030 - Detail fields used to describe the loaded document.

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](#)

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](#)

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](#)

TM_C140_S050 - Processing reference after upload and save.

 **Corporate Intelligence System**

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

[Q](#)

[Chat with Me](#) 

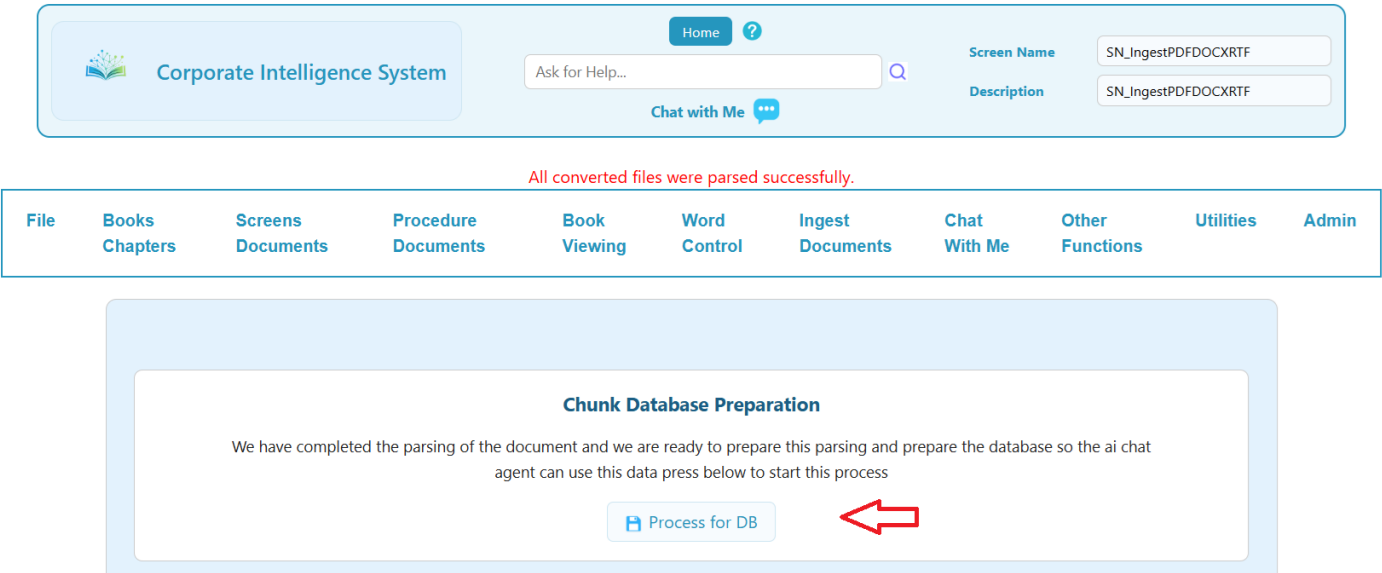
Screen Name

Description

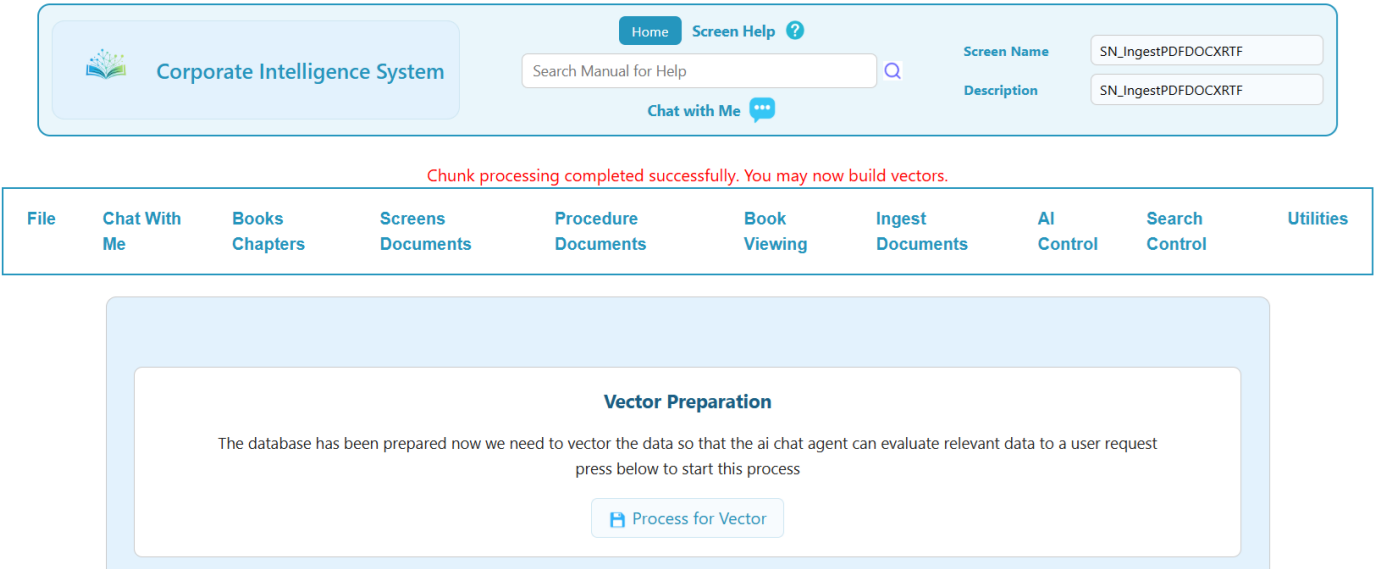
A total of 821 HTML markers were removed.

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.

TM_C140_S060 - Resume parsing reference for segmented documents.



TM_C140_S070 - Chunk database preparation screen.



TM_C140_S080 - Vector preparation screen.

160.000 - Knowledge Note Entry Screens

Screen | 2026-05-17 14:48:06 TM_C190_S160

160.000 Knowledge Note Entry Screens
Purpose

This section provides a visual reference for the Knowledge Note entry 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

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

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

Business Domain

Unassigned

Or enter custom Business Domain

Select from the list or type a custom Business Domain.

Document Description

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.

TM_C150_S010 - Knowledge Note detail screen used to enter reusable business knowledge directly into the system.

170.000 - Email Ingestion Screens

Screen | 2026-05-17 14:48:06 TM_C190_S170

170.000 Email Ingestion Screens
Purpose

This section provides a visual reference for email ingestion screens.

140

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

Cybersecurity

Business Domain

Or enter custom 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

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.

TM_C150_S020 - Email detail screen used to upload an EML file or manually enter email text.

141

180.000 - Letter and Memo Ingestion Screens

Screen | 2026-05-17 14:48:06 TM_C190_S180

180.000 Letter and Memo Ingestion Screens

Purpose

This section provides a visual reference for letter and memo ingestion screens.

Corporate Intelligence System

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

Allowed file types: PDF, DOCX, RTF

Upload

Uploaded File: TestMemo_20260404_192116.pdf

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

Or enter custom Business Domain

Select from the list or type a custom Business Domain.

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.

TM_C150_S030 - Letter and memo detail screen used to upload and classify business correspondence.

142

190.000 - Spreadsheet Ingestion Screens

Screen | 2026-05-17 14:48:06 TM_C190_S190

190.000 Spreadsheet Ingestion Screens

Purpose

This section provides a visual reference for spreadsheet ingestion screens.

Corporate Intelligence System

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

Upload

Allowed file types: PDF, DOCX, RTF

Uploaded File: MultiSheet_20260412_151547.xlsx

Save

Clear

Spreadsheet Guidance

Document Format

XLSX_DOCUMENT

Audience

Unassigned

Display Name

Business Domain

Unassigned

Document Description

Or enter custom Business Domain

Select from the list or type a custom Business Domain.

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.

TM_C150_S040 - Spreadsheet upload screen used to load XLS and XLSX files for search and Chat AI retrieval.

143

TM_C150_S050 - Program upload screen used to load source code and technical files.

210.000 - Search and List Documents Screens

Screen | 2026-05-17 14:48:06 TM_C190_S210

210.000 Search and List Documents Screens

Purpose

This section provides a visual reference for searching and listing loaded document records.

 Corporate Intelligence System

Home

Screen Help ?

Search Manual for Help

Q

Chat with Me

...

Screen Name

SN_DocList

Description

SN_DocList

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

Any Text

Cancel

From Date

To Date

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...	D00000062_Accounting and Financi
Download PDF	PDF_DOCUMENT	Comprehensive IT Security Policy	Comprehensive IT Security Policy	This document is a structured Comprehensive IT ...	D00000061_Comprehensive-IT-Sec
Download PDF	PDF_DOCUMENT	HR POLICY MANUAL	HR POLICY MANUAL	This document is a structured HR POLICY MANU...	D00000060_HR-Guide_-Policy-and-

TM_C160_S010 - Search and List Documents screen used to locate loaded documents and download the original files.

200.000 - Appendix B Suggested Naming Conventions

10.000 - Training Manual Screen Name Convention

Screen | 2026-05-17 14:54:28 TM_C200_S010

010.000 Document Naming Standards

Purpose

This section explains how to choose clear document names that improve search results and Chat AI retrieval.

Document names should clearly describe the business purpose of the content.

A good document name helps users understand what the document contains before they open it.

It also helps the Corporate Intelligence System classify, search, and retrieve the document more accurately.

Use names that include the subject, process, department, or business function when appropriate.

Examples of strong document names include Human Resources Policy Manual, Payroll Year End Checklist, Vendor Setup Procedure, Spreadsheet Ingest Instructions, and Website Backup Procedure.

Avoid vague names such as Miscellaneous, General Notes, Test File, Old Document, or Information.

If a document is part of a recurring process, include the process name in the title.

If a document belongs to a department, include the department name when it improves clarity.

If a document covers a specific period, version, or fiscal year, include that information only when it is useful for identification.

Consistent document names make the knowledge base easier to search, easier to maintain, and easier for users to trust.

20.000 - Training Manual Image Name Convention

Screen | 2026-05-17 14:54:28 TM_C200_S020

020.000 Book and Chapter Naming Standards

Purpose

This section explains how to name books and chapters so manuals remain organized and easy to navigate.

A book name should identify the major body of knowledge being maintained.

Examples include Training Manual, Operating Manual, Human Resources Manual, Accounting Procedures Manual, and Technical Support Guide.

Book names should be broad enough to contain related chapters but specific enough to distinguish one manual from another.

Chapter names should identify major subject areas within the book.

Examples include Logging In and Navigating the System, Using the Chat AI Agent, Loading Documents, Creating Procedures, and Common User Mistakes and Troubleshooting.

Chapter names should not be overly long, but they should clearly describe the group of sections contained in the chapter.

Chapter numbers control the order in which chapters appear in the manual.

Using numbers such as 010.000, 020.000, and 030.000 leaves room to insert additional chapters later.

Good book and chapter names help users understand the structure of the manual before they read the detailed sections.

Clear names also improve search, online manual navigation, generated PDF output, and Chat AI context.

30.000 - Book Chapter and Section Naming Guidelines

Screen | 2026-05-17 14:54:28 TM_C200_S030

030.000 Screen and Procedure Naming Standards

Purpose

This section explains how to name screen documents and procedures so they are easy to identify, search, and maintain.

A screen document should describe the purpose of a specific screen or section of a manual.

A procedure should describe how to perform a specific task.

Screen and procedure names should be clear, direct, and written in language that users understand.

Examples of good screen section names include Logging In, Understanding the Main Menu, Asking Good Questions, and Entering Document Information.

Examples of good procedure names include Creating a Procedure, Loading PDF DOCX and RTF Documents, Running Website Backups, and Configuring Email Settings.

Procedure names should usually describe an action because procedures explain how work is performed.

Avoid names such as General Procedure, Miscellaneous Screen, Other Steps, or Notes.

For Training Manual screen names, use the established convention TM_Cxxx_Sxxx.

The C value identifies the chapter number, and the S value identifies the section number.

For example, TM_C150_S040 identifies Training Manual Chapter 150 Section 040.

This naming pattern connects the database record, manual section, and image file using the same identifier.

210.000 - Appendix C Sample Book and Chapter Structures

10.000 - Sample Training Manual Structure

Screen | 2026-05-17 14:57:13 TM_C210_S010

010.000 Example Executive Manual Structure

Purpose

This section provides a sample book and chapter structure for an executive or management manual.

An executive manual should organize high level information that helps leadership understand strategy, governance, major policies, performance expectations, and organizational direction.

A sample executive manual may include chapters for Corporate Overview, Strategic Objectives, Leadership Responsibilities, Operating Policies, Governance Standards, Risk Management, Performance Metrics, Reporting Requirements, and Decision Support.

The purpose of this type of manual is not to document every detailed task.

Its purpose is to provide a structured reference for leadership topics that should remain consistent across the organization.

Each chapter should contain sections that explain the subject clearly and connect the topic to practical management responsibilities.

For example, a Governance Standards chapter may include sections for approval authority, board reporting, compliance expectations, and policy review cycles.

An executive manual becomes more useful when it separates broad leadership guidance from detailed department procedures.

This structure allows executives and managers to find major rules and organizational principles quickly without reading operational instructions intended for other users.

20.000 - Sample Department Manual Structure

Screen | 2026-05-17 14:57:13 TM_C210_S020

020.000 Example Human Resources Manual Structure

Purpose

This section provides a sample book and chapter structure for a Human Resources manual.

A Human Resources manual should organize employee related policies, procedures, and guidance in a way that is easy for managers and employees to understand.

A sample Human Resources manual may include chapters for Hiring and Onboarding, Employee Benefits, Time and Leave Policies, Employee Conduct, Performance Reviews, Workplace Safety, Training Requirements, Payroll Coordination, Disciplinary Actions, and Separation Procedures.

Each chapter should group related topics so users can locate information quickly.

For example, the Time and Leave Policies chapter may include sections for vacation leave, sick leave, holidays, family medical leave, unpaid leave, and leave approval procedures.

The Employee Conduct chapter may include sections for attendance, workplace behavior, confidentiality, conflicts of interest, and disciplinary expectations.

Human Resources content should be written clearly because employees may use the manual without assistance from Human Resources staff.

Strong section names and detailed descriptions are especially important because users may search for the same topic using different terms such as vacation, leave, time off, or paid time away.

A well structured Human Resources manual reduces repeated questions and helps employees receive consistent answers.

30.000 - Sample Procedure Manual Structure

Screen | 2026-05-17 14:57:13 TM_C210_S030

030.000 Example Accounting Manual Structure

Purpose

This section provides a sample book and chapter structure for an Accounting and Finance manual.

An Accounting manual should organize financial policies, processing rules, reporting procedures, and recurring accounting tasks.

A sample Accounting manual may include chapters for General Ledger, Accounts Payable, Accounts Receivable, Payroll, Bank Reconciliation, Financial Reporting, Budgeting, Fixed Assets, Tax Reporting, Month End Procedures, Year End Procedures, and Audit Support.

Each chapter should contain sections and procedures that explain how accounting work is performed and what controls apply.

For example, an Accounts Payable chapter may include vendor setup, invoice entry, approval workflow, payment processing, void checks, and vendor inquiry procedures.

A Payroll chapter may include employee setup, earnings codes, deductions, tax tables, direct deposit, payroll posting, and year end reporting.

Accounting documentation should include enough detail to preserve business rules, calculations, approval requirements, and exception handling.

This type of manual is especially valuable because many accounting processes are recurring and depend on accurate timing and consistent execution.

A well organized Accounting manual improves training, reduces errors, supports audits, and helps the Chat AI Agent answer finance related questions more accurately.

220.000 - Appendix D Example Questions for the Chat AI Agent

10.000 - Questions for Policies and Procedures

Screen | 2026-05-17 15:00:57 TM_C220_S010

010.000 Human Resources Questions

Purpose

This section provides sample Human Resources questions that users may ask the Chat AI Agent.

Human Resources questions often involve employee policies, benefits, leave, conduct, onboarding, training, and workplace rules.

Good questions should include the policy area or employee situation so the Chat AI Agent can retrieve the most relevant supporting content.

Example question: What is the company policy for requesting vacation leave?

Example question: How does an employee request family medical leave?

Example question: What benefits are available to full time employees?

Example question: What steps should a manager follow during employee onboarding?

Example question: What are the rules for employee attendance and workplace conduct?

Example question: What documentation is required when an employee requests unpaid leave?

These questions help users understand how employee policy and procedure information can be retrieved from manuals, knowledge notes, and uploaded Human Resources documents.

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.

20.000 - Questions for Documents and Manuals

Screen | 2026-05-17 15:00:57 TM_C220_S020

020.000 Accounting and Finance Questions

Purpose

This section provides sample Accounting and Finance questions that users may ask the Chat AI Agent.

Accounting questions often involve invoices, payments, payroll, month end processing, reports, controls, approvals, taxes, and financial procedures.

Good questions should identify the accounting process, report, transaction type, or business rule involved.

Example question: What is the procedure for setting up a new vendor?

Example question: How are invoices reviewed and approved before payment?

Example question: What steps are required during month end closing?

Example question: How are payroll tax tables loaded and maintained?

Example question: What reports should be reviewed before completing year end processing?

Example question: How should an employee reimbursement request be processed?

These questions help users retrieve accounting procedures, control requirements, reporting guidance, and financial processing rules from the knowledge base.

30.000 - Questions for Troubleshooting and Follow Up

Screen | 2026-05-17 15:00:57 TM_C220_S030

030.000 Information Technology Questions

Purpose

This section provides sample Information Technology questions that users may ask the Chat AI Agent.

Information Technology questions often involve software access, passwords, support requests, backups, system configuration, security, and operational procedures.

Good questions should identify the system, screen, application, file, or technical process involved.

Example question: How does a user request access to a software application?

Example question: What is the procedure for restoring a system backup?

Example question: Where are website backup files stored?

Example question: How should an administrator review system log files?

Example question: What steps are required to restart a background processing worker?

Example question: What should I check if a document upload fails?

These questions help users retrieve IT support procedures, technical documentation, configuration guidance, and system operations information.

230.000 - Appendix E Quick Start Checklist

10.000 - Quick Start Checklist for New Users

Screen | 2026-05-17 15:02:39 TM_C230_S010

010.000 Building Your First Knowledge Base

Purpose

This section provides a quick start checklist for creating the first usable knowledge base in the Corporate Intelligence System.

Begin by deciding what business area the first knowledge base will support.

Choose a focused subject such as Human Resources policies, accounting procedures, IT support documentation, operating procedures, or training material.

Create the Book record that will contain the knowledge.

Create the major Chapters that organize the subject into logical groups.

Use clear names that users will understand when they search or browse the manual.

Keep the first knowledge base focused enough to complete and test quickly.

After the basic structure exists, begin adding Screen Documents, Procedures, Knowledge Notes, or uploaded files.

The goal of the first knowledge base is to create a working example that can be searched, viewed, and used by the Chat AI Agent.

Once the first knowledge base works well, the same approach can be repeated for other departments and business areas.

20.000 - Quick Start Checklist for Content Authors

Screen | 2026-05-17 15:02:39 TM_C230_S020

020.000 Loading Your First Documents

Purpose

This section provides a quick start checklist for loading the first documents into the Corporate Intelligence System.

Select a small group of useful documents that users already need for daily work.

Good starting documents include policy manuals, procedure guides, training handbooks, frequently used spreadsheets, important emails, letters, memoranda, and technical notes.

Before loading each document, choose a clear Display Name.

Select the correct Document Type, Audience, and Business Domain.

Write a strong Document Description that explains what the document contains and what questions it should help answer.

Upload or enter the content using the correct ingest screen.

Save the document information.

Complete parsing, resume processing if required, chunk the content into the database, and build vectors.

After processing is complete, confirm that the document appears in Search and List Documents.

Loading a few high quality documents is better than loading many weak or poorly described documents.

30.000 - Quick Start Checklist for Document Loading

Screen | 2026-05-17 15:02:39 TM_C230_S030

030.000 Running Your First Searches

Purpose

This section provides a quick start checklist for testing search after documents have been loaded.

Begin with simple terms that you know appear in the documents.

Search for document names, policy names, process names, department names, and other important business terms.

Review the search results and confirm that the expected documents appear near the top.

If results are weak, try shorter search phrases or alternate terms.

If the correct document does not appear, confirm that the document was loaded, chunked, vectored, and assigned to the correct audience.

Review the document name and description to determine whether they provide enough search context.

Use Search and List Documents to confirm that the original file or record exists.

Successful searches confirm that the knowledge base is beginning to operate as intended.

Search testing should be performed before relying heavily on Chat AI responses.