


Managing Contextual Documentation with RiteGen



Uploading and Processing Documents

To upload new documents for processing:

1. Navigate to the **Documents** tab in the left-hand sidebar.
2. Click the **Upload & Process Documents** button at the top of the interface.
3. Select the desired PDF, DOCX, or supported file types from your local system.
4. Once uploaded, the document will appear in the table below with relevant metadata:
 - **Document Name**
 - **File Type**
 - **File Size**
 - **Upload Date**
 - **Last Modified**
 - **Page Count**

 **Note:** Only supported file types will be accepted. Please ensure the document is complete and uncorrupted before uploading.



Navigating and Viewing Documents

Uploaded documents are listed in a searchable, paginated table. You can:

- Use the **Search Documents** bar to quickly locate specific files.
- Adjust the **Rows per Page** setting to view more or fewer entries.



Deleting Documents

To remove a document from the database:

1. Check the box next to the document you wish to delete.
2. Click the **Delete Selected** button.

OR

1. Click the **Purge Database Collection** button.
2. Confirm deletion when prompted.

! Warning: This action is irreversible. Ensure the document is no longer needed before proceeding.



Refreshing and Managing Collections

If document changes are not appearing immediately:

- Reload the browser to view the most up-to-date document list.
 - Regular database maintenance ensures optimal performance. For bulk deletions or archiving, contact the platform admin.
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Additional Support

If you encounter issues or require advanced help:

- Navigate to the **Tooltips** section under Support.
- Choose from the available options such as:

- **Chat Assistance**
- **Managing Documents**
- **More Help**

These resources are designed to empower users with just-in-time guidance while using RiteGen.

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