GKCHATTY - Internal User Guide

1. Introduction

Welcome: Welcome to GKCHATTY!

Purpose: GKCHATTY is your internal AI assistant, designed to answer questions based on Gold Key documents. It uses both the central System Knowledge Base (managed by admins) and documents you personally upload. The goal is to help you find information quickly and accurately.

About This Guide: This guide covers the main features and how to use them during this internal testing phase.

Feedback: Your feedback is valuable! Please report any issues, bugs, or suggestions to [Specify How Users Should Provide Feedback - e.g., email address, Teams channel].

2. Getting Started

Accessing GKCHATTY: Open your web browser and go to: https://goldkey-chat-demo-cli.netlify.app

Login / Registration: You will see the main authentication page.

[Authentication Page - Login and Register Forms]

Login: If you have credentials, enter your username and password in the "Login" box and click "Login".

Register: If you need to create an account (or if instructed), use the "Register" box. Enter a username and a password (minimum 6 characters). Click "Register".

You should see a success message after registering. You can then log in using the credentials you just created.

[Register Success Message]

3. Navigating the Interface

Once logged in, you'll see the main chat interface.

Main Chat UI - Sidebar showing Gold Key logo, navigation options, and chat history

Image 1: Main Chat UI with sidebar navigation

Key Areas:

Sidebar (Left):

- **Logo:** The Gold Key Insurance logo (links to goldkeyinsurance.ca).
- **New Chat button:** Click this to start a fresh conversation.
- **Document Manager button:** Takes you to the page where you can upload and manage your personal documents.
- **Usage link:** Shows your estimated token usage for the current month.
- **CHATS List:** Your past conversations are listed here (named automatically). Click a name to load that chat history. (Initially shows "No chats yet.").
- **Delete All Chats button:** Permanently removes all your past chat histories.
- **Welcome, [username]! & Logout button:** Logs you out of the application.

Chat Area (Center): This is where your conversation with the AI appears. Messages from you and the assistant are displayed here.

Input Area (Bottom):

- **Toggle ("System KB" / "My Docs"):** Crucial: Select your knowledge source before asking.

Chat Input - System KB and My Docs toggle

Image 2: Chat Input - System KB/My Docs Toggle

- **System KB (Default):** Ask questions based on the central, company-wide knowledge base (policies, procedures, etc.).
- **My Docs:** Ask questions based only on documents you have personally uploaded.
- **System KB Button (Graph Icon):** Clicking this opens a searchable list of documents currently in the System Knowledge Base.

Chat Example with System KB and Sources

Image 5: Chat Example with System KB Sources

- **Light/Dark Mode Toggle:** Switches the interface theme.

- **Text Input Box:** Type your question here.
- **Send button:** Sends your question to the AI.

4. Using the Chat Feature

Starting: Click "New Chat".

Select Source: Choose "System KB" or "My Docs" using the toggle.

Ask: Type a clear, specific question and click "Send".

Responses:

- **Answer:** The AI's response based on the selected knowledge source.
- **Usage/Cost:** (Small text below the answer) Shows the approximate token usage and estimated cost for generating that specific response.
- **Sources:** Lists the document(s) used. Clicking may open the document viewer. Always verify critical information by checking the sources.

History: Click chat names in the sidebar to revisit past conversations. Chats are named automatically.

Deleting: Use "Delete All Chats" in the sidebar to clear your history.

5. Managing Your Documents ("My Docs")

Accessing: Click the "Document Manager" button.

Document Manager Interface

Image 4: Document Manager Interface with upload area and document list

Uploading:

- Accepted files: PDF or TXT (Max 10MB).
- Click "Upload a file" or drag-and-drop onto the designated area.
- Click the "Upload" button below the drop zone.
- Wait for the "Success! File uploaded." message. The document will then be processed and indexed (may take a short time).

Viewing Uploaded Docs:

- Your uploaded documents appear in the "Uploaded Documents" list.
- Clicking on a document name opens the viewer.

Searching Your Docs: Remember to toggle to "My Docs" in the main chat interface before asking questions about these files.

Deleting Docs:

- Click the red "Delete" icon next to a specific document to remove it.
- Click the "Delete All My Documents" button to remove all your uploaded files.

6. Checking Your Usage

Accessing: Click the "Usage" link in the sidebar.

Usage Page Example

Image 3: Monthly Usage Statistics Page

Understanding: Shows your estimated token usage and cost for the current calendar month (resets on the 1st).

Returning: Click the "Back to Chat" button to return to the main chat view.

7. Logging Out

Click the "Logout" button at the bottom of the sidebar.