

AI Reporting Operations Guide

How to get the most from the AI assistant — what it can answer, how to frame questions and how to interpret responses.

FOR

Operations staff · Platform administrators

What the AI Does

The AI assistant answers questions about the platform's data in plain English. You type a question, the AI identifies the most appropriate approved report, runs it against live data and returns a structured answer — with a written summary, tables or charts as appropriate.

The AI does not have open access to the database. It operates through a fixed catalogue of approved reports. This ensures the answers are accurate, consistent and within defined boundaries.

i Every AI response ends with an advisory reminder. The AI provides guidance based on data — it does not make compliance or clinical decisions. Always apply professional judgement to AI recommendations.

Where to Access the AI

LOCATION	BEST FOR
Admin → AI Assistant tab	Operational questions — revenue, attendance, expiring certificates, compliance gaps, renewals
Organisation Hub → AI tab	Company-level compliance questions — scoped to that organisation's data only
Management Intelligence dashboard	Executive questions — business performance, customer health, revenue leakage, relationship risk

How to Ask Good Questions

The AI maps your question to an approved report. The closer your question is to the intent of that report, the better the match. You don't need to know which report to use — just describe what you want to know.

Questions that work well

- "Which courses generated the most revenue in the last 12 months?"
- "Show expiring certificates in the next 90 days"
- "Which departments have the biggest compliance gaps?"
- "Who are our top five customers by spend?"

- *"Which customers are at risk of not renewing?"*
- *"What is our overall compliance score by organisation?"*
- *"Generate a management summary for this month"*

If the AI can't find a match

If your question doesn't map to an available report, the AI will offer general advisory guidance rather than data. In this case, try rephrasing — focus on the outcome you want rather than how to get it. For example, instead of *"give me the SQL for expiring certificates"*, try *"show me certificates expiring in the next 30 days"*.

Saving Reports

After the AI runs a report, click **Save Current** to save it with a name. Set the visibility:

- **Private** — only you can see it in your saved reports
- **Organisation** — all users in your organisation can access it
- **Admin Global** — all platform administrators can access it

Saved reports appear in the panel below the chat. Click any saved report to re-run it instantly with the latest data.



Save your most commonly run reports as Admin Global so the whole team can access them without having to know which question to ask.

Reading AI Responses

AI responses are structured as:

- **Summary** — a written narrative explaining the key findings
- **Data** — a table or chart of the underlying figures
- **Recommended actions** — specific next steps based on the data
- **Advisory reminder** — a reminder that these are data-based recommendations, not professional advice

The summary is written to be shared. Copy it into a management report or meeting agenda if it captures what you need.

Executive AI Reports

The Management Intelligence dashboard includes seven quick-prompt buttons covering the most important commercial questions:

- Business snapshot
- At-risk customers
- Renewal revenue outlook
- Growth and upsell opportunities
- Revenue leakage
- Relationship risk
- Account opportunity value

These run the full executive report suite and are designed to answer the question: *where should we focus this week?*
