



# Analyst OS v1

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## Start Here

Welcome to the **Analyst OS v1** workspace. This system is designed to help business analysts organize stakeholder information, track meetings, manage decisions, monitor risks, and maintain a transparent log of AI-assisted work. Please review the guidelines below before getting started.

## Guidelines & Best Practices



### 🤖 AI Use Rules: Human-in-the-Loop Policy

All AI-generated summaries, insights, and content must be reviewed and verified by a human analyst before being considered final. AI is a tool to assist and accelerate analysis, not replace human judgment. Always cross-check AI outputs with source materials and apply critical thinking.



## Data Handling: No PII or Sensitive Client Data

Do not store Personally Identifiable Information (PII) or sensitive client data in plain text within this workspace. Use anonymization techniques, codes, or reference IDs when necessary. Ensure compliance with your organization's data protection and privacy policies at all times.



## Naming Conventions

All entries across databases should follow this standardized format:

[YYYY-MM-DD] | [Project Code] | [Subject]

**Example:** 2026-02-24 | PROJ-001 | Stakeholder Interview Summary

Consistent naming ensures easy search, filtering, and chronological tracking across the workspace.



## Database Blueprints

Below is an overview of each database in the Analyst OS v1. Use these descriptions to understand how to leverage each database effectively.

### ▼ 00 Dashboard

The **Dashboard** serves as the central hub for your workspace. It provides at-a-glance views of key metrics, recent updates, and quick links to all other databases. Use this page to monitor overall project health, upcoming meetings, open risks, and pending decisions. Customize views to surface the most critical information for your current focus.

### ▼ 01 Stakeholders

The **Stakeholders** database is your central repository for all individuals and groups involved in or affected by your projects. Track contact information (non-PII), roles, influence levels, communication preferences, and engagement history. Use this database to ensure no key stakeholder is overlooked and to tailor your communication strategies effectively.

### ▼ 02 Meetings

The **Meetings** database captures all meeting records, including agendas, notes, action items, and attendees. Use standardized naming conventions to organize meetings chronologically and by project. This database ensures that meeting outcomes are documented, action items are tracked, and team alignment is maintained over time.

### ▼ 03 Candidates

The **Candidates** database is used to track potential solutions, vendors, tools, or team members being evaluated. Document evaluation criteria, scores, interview notes, and decision rationale. This database supports transparent and traceable decision-making processes, especially when multiple options are under consideration.

### ▼ 04 Decisions

The **Decisions** database logs all key decisions made throughout the project lifecycle. Capture the decision context, rationale, stakeholders involved, alternatives considered, and outcomes. This database ensures accountability and provides a historical record that can be referenced for future analysis or audits.

### ▼ 05 Risks

The **Risks** database tracks identified risks, their likelihood, impact, mitigation strategies, and ownership. Use this database to proactively manage uncertainties and ensure that risks are monitored and addressed before they escalate into issues. Regularly review and update risk statuses to maintain situational awareness.

### ▼ 06 AI Log

The **AI Log** database maintains a transparent record of all AI-assisted activities within the workspace. Document what AI tools were used, for what purpose, the output generated, and the human verification performed. This log supports the Human-in-the-Loop policy and ensures traceability and accountability in AI-augmented workflows.

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*You're all set! Navigate to the relevant database to begin building your Analyst OS v1 workspace.*