

AI Business Assistant Platform - User Guide v2.0

Welcome to Your Professional AI-Powered Business Assistant

This comprehensive platform streamlines your daily business operations through three intelligent applications designed for modern professionals and teams.

Platform Overview

The AI Business Assistant Platform provides three core applications¹:

- **Schedule Builder:** Creates optimized daily schedules with intelligent time-blocking
- **Risk Register Builder:** Generates comprehensive risk assessments for business projects
- **Meeting Summarizer:** Produces structured, actionable meeting summaries

Getting Started

System Requirements

- Modern web browser (Chrome, Firefox, Safari, Edge)
- Internet connection for AI processing
- No software installation required

Accessing the Platform

1. Navigate to the main dashboard
2. Review the three application options
3. Click any application tile to begin
4. Access the User Guide PDF anytime from the main page

Schedule Builder - Complete Workflow

Step 1: Initial Setup

- Click "Schedule Builder" from the main dashboard
- The AI will greet you and begin the structured interview process
- Prepare information about your daily tasks, meetings, and preferences

Step 2: Provide Comprehensive Details

The AI will systematically ask about¹:

- **Basic Information:** Day, working hours, fixed appointments
- **Tasks & Priorities:** All tasks, critical items, deadlines

- Work Style: Peak energy times, focus preferences, buffer needs
- Constraints: Time restrictions, recurring commitments, finish time

Example Interaction:

User: "I need to schedule Wednesday. I work 9 AM to 6 PM, have a team meeting at 10 AM, client presentation at 2 PM, and need to finish the quarterly report."

AI: "Thank you! To optimize your schedule, I need more details:

1. What are ALL your tasks for Wednesday?

2. Which 3 tasks are absolutely critical?

3. When do you feel most focused and energetic?"

Step 3: Review Generated Schedule

The AI creates a detailed table with:

- Time Block: Specific time slots (e.g., "9:00-10:00 AM")
- Task: Clear activity descriptions
- Priority: High, Medium, or Low
- Duration: Time allocation for each task
- Energy Level: Visual indicators (⚡ to ⚡⚡⚡⚡⚡)

Step 4: Refinement & Optimization

- Request timing adjustments
- Modify priority levels
- Add or remove tasks
- Adjust buffer times

Export Options:

- CSV: For spreadsheet analysis and team sharing
- PDF/HTML: Professional format for printing and presentations
- ICS Calendar: Direct import to Outlook, Google Calendar, Apple Calendar

Risk Register Builder - Enterprise-Grade Risk Management

Step 1: Project Context

- Describe your project or business initiative
- Include scope, timeline, budget, and objectives

- Specify industry and organizational context

Step 2: Systematic Risk Assessment

The AI conducts a structured interview covering¹:

- Project Scope: Stakeholders, similar projects, lessons learned
- Operational Environment: Vendors, technology dependencies, regulations
- Resource Risks: Timeline concerns, budget constraints, scope creep
- Strategic Risks: Market conditions, organizational changes, key personnel

Step 3: Comprehensive Risk Register

Generated output includes¹:

- Risk ID: Unique identifiers (RR-001, RR-002, etc.)
- Risk Description: Detailed risk scenarios
- Likelihood: Scale 1-5 (Very Low to Very High)
- Impact: Scale 1-5 (Minimal to Critical)
- Risk Score: Calculated value (Likelihood × Impact)
- Category: Operational, Financial, Technical, Strategic, Compliance
- Mitigation Strategy: Specific action plans

Risk Scoring Framework:

- Risk Score 1-5: Low priority, monitor
- Risk Score 6-15: Medium priority, plan mitigation
- Risk Score 16-25: High priority, immediate action required

Meeting Summarizer - Professional Documentation

Step 1: Meeting Information

- Provide meeting type, duration, and participants
- Share notes, transcripts, or key discussion points
- Include participant roles and responsibilities

Step 2: Structured Content Capture

The AI systematically extracts¹:

- Meeting Structure: Purpose, agenda items, content
- Decisions & Outcomes: Specific decisions, disagreements, issues
- Action Items: Tasks, ownership, deadlines
- Follow-up: Dependencies, resources, next meetings

Step 3: Professional Summary Generation

Output includes¹:

- Meeting Overview: Date, duration, attendees, purpose
- Key Discussion Points: Organized by topic
- Decisions Made: Clear outcomes with context
- Action Items Table: Owner, deadline, priority, status, notes
- Unresolved Issues: Items requiring follow-up

Action Item Tracking:

- Priority: High, Medium, Low
- Status: Open, In Progress, Completed
- Deadline Format: YYYY-MM-DD
- Dependencies: Linked tasks and requirements

Advanced Features & Best Practices

Complexity-Aware Processing

The platform automatically adjusts response complexity based on input indicators¹:

- Easy Level: Basic time management, straightforward risks, simple summaries
- Medium Level: Strategic considerations, enterprise risks, detailed analysis
- Hard Level: Executive-level complexity, regulatory compliance, crisis management

Input Optimization Tips

- Use specific business terminology
- Provide detailed context and constraints
- Mention industry-specific requirements
- Include stakeholder information
- Specify compliance or regulatory needs

Export Integration Workflows

- Morning Planning: Export schedules to calendar apps
- Project Documentation: Save risk registers to project management tools
- Team Communication: Distribute meeting summaries via email
- Compliance: Archive outputs for audit trails

Security & Privacy Features

Input Validation

- Advanced prompt injection protection
- Content sanitization and XSS prevention
- Character limits and input validation

- Secure session management

Data Handling

- Session-based storage (no permanent data retention)
- Secure API communication
- CORS protection for cross-origin requests
- Encrypted session cookies

Troubleshooting & Support

Common Issues & Solutions

Export Problems:

- Ensure content generation is complete before exporting
- Check browser download permissions
- Try refreshing and regenerating content
- Verify popup blockers aren't interfering

AI Response Quality:

- Provide more detailed, specific input
- Use professional business language
- Ask follow-up questions for clarification
- Use the reset function for fresh conversations

Browser Compatibility:

- Use modern browsers with JavaScript enabled
- Clear cache if experiencing issues
- Disable ad blockers that might interfere
- Ensure stable internet connection