

GUIDE

Using the AI Assistant

The AI Assistant is a threaded chat panel grounded in the IDN schema and CAFM best practices. It is designed to answer "how does this work" and "where does this live" questions about the platform.

Opening the assistant

- 1 Click the **AI Assistant** chip in the platform header (top-right, next to your avatar).
- 2 The panel slides in from the right. If this is your first visit you will be asked to sign in — the assistant uses your account to keep conversations private and persistent.
- 3 Start typing in the message box at the bottom and press Enter to send.

Threads

Each conversation lives in its own thread, listed in the panel's sidebar. Threads are saved to your account, so you can close the assistant, navigate around the platform, and come back to the same history later. Start a new thread when you switch topics so older context does not bleed into a new question.

What the assistant knows

- **The full IDN schema** — 11 modules, 333 tables, 12,000+ fields.
- **CAFM concepts** — work orders, preventive maintenance, SLAs, asset lifecycle, space, EHS, materials.
- **Partner workflows** — how service partners use the platform day-to-day.

It does *not* have access to your live data. Treat it as a domain expert who has read the schema, not as a query engine.

Prompts that work well

- Which tables connect a `work_order` to the assets it touches?
- Explain the difference between preventive and corrective maintenance in the IDN model.
- What fields on the `building` table support space planning?
- How would I model an SLA breach across the work module?
- Summarize the EHS module in three sentences.

Be specific

Mention table or field names (e.g. `work_order`, `asset_id`) when you can. The more concrete your prompt, the more concrete the answer.

Formatting & privacy

Responses are rendered as Markdown — headings, bullets, and fenced code blocks. Copy any block straight into a query, document, or ticket.

Threads are stored under your account and protected by row-level security — no one else can read your conversations, including other users in your organization.