

AI information preparation record

Inspect sources and record the changes needed before a workflow test.

An inventory of required sources and gaps

Checks for meaning, dates and permissions

A completed client-reporting example

A free worksheet from ailevrg.com/guides/ai-data-preparation

Choose the question or workflow first. Inspect a representative sample before planning a large migration.

01 Task

Question or workflow result

Training or retrieval task

Sources required and owners

Representative sample to inspect

02 Meaning

Definitions, units and identifiers

Duplicates and old versions

Missing or contradictory records

Extraction or transformation risks

03 Boundaries

Source origin and collection date

Validity and review rules

Client and user permissions

Approved correction process

04 Test

Known questions and expected evidence

Missing, old and wrong-client examples

Preparation changes and reviewer

Observed results and next review

Preparing reporting information

Invented teaching example. No client outcome is claimed.

Required records

An invented client agreement, metric definition and two monthly exports.

Checks

Client identifiers and metric definitions match.

One export covers only part of a month.

Correction

Hold the comparison until an authorised complete-period source is available.

Evidence

Keep each source link, the period it describes and the date collected.

Test

A report-preparation request must flag the incomplete comparison rather than produce an unsupported explanation.