

VYNETA PRACTICAL RESOURCES

LESS GUESSWORK. A BETTER FIRST TEST.

AI Knowledge Base Workbook

Turn business knowledge into sourced answers you can test and maintain.

READ / FILL IN / TEST / DECIDE

For small teams preparing content for AI assistants

Leave with a source register, one approved answer card and a repeatable acceptance test.

How to use: Read pages 2-5, then fill in pages 6-7. Use a PDF reader that supports forms and save a local copy, or print the worksheets. Browser viewers may not save form entries reliably.

Free to use without a software purchase. Vendor-neutral worksheets. No promised traffic, revenue, time savings or ranking results.

01 / WORK THROUGH THE DECISION

Choose a narrow answerable job

Define the first audience and task

Choose one audience and a small group of related questions: prospects comparing a service, customers understanding a published policy or staff finding an approved procedure. Do not combine public customer answers and confidential staff instructions by default.

Write the boundary before importing content

Define what the assistant may explain, what needs an authorized system lookup and what must go to a person. An article about a refund policy does not authorize a refund. A pricing document does not establish the price agreed in an individual contract.

Inventory sources instead of uploading everything

Create a source register with title, location, audience, owner, approval state, effective date and review trigger. Mark drafts, archived policies and conflicting copies. Import only content approved for the intended audience.

Keep access decisions outside the prompt

Do not depend on a sentence saying keep this secret to protect private information. Check the platform permissions, storage and access behavior before adding restricted material. If you cannot verify the boundary, leave that material out of the pilot.

Fictional first pilot

A small agency starts with five public questions about scope, turnaround and how to request a quote. It excludes client contracts, account records and internal margins. Five questions is a manageable example, not an industry requirement.

02 / WORK THROUGH THE DECISION**Build answers with conditions attached****Use a consistent answer card**

Include question, short answer, conditions, exceptions, unknowns, approved next action, source location, owner and effective/review dates. Keep one authoritative policy and link supporting copies to it rather than maintaining contradictory versions.

Write for the decision, not just a keyword

State the point directly, then attach the condition that changes it. Weak: revisions are included. Better: two rounds of revisions are included in the agreed scope; new deliverables require a separate quote. The better answer helps the reader decide without assuming unlimited work.

Keep related facts together

Give a section a clear heading and enough context to stand on its own. A limit in a distant footnote may be lost when only part of a document is retrieved. Test the actual system rather than assuming a particular heading or chunk size guarantees correct retrieval.

Mark gaps honestly

If the source does not establish an answer, record what is missing and who can approve it. Do not use AI to invent policy, legal terms, delivery dates or commitments. A useful unknown routes the question to the right owner.

Original answer card example

Question: Can you launch our website this Friday? Answer: Our standard estimate is ten business days after approved content and deposit. Exceptions: custom integrations require separate planning. Unknown: whether this project is ready. Next step: send the project brief for a confirmed schedule. Fictional policy, not a recommended promise.

03 / WORK THROUGH THE DECISION

Test the whole answer path

Freeze a small test set

Write the question, expected facts, forbidden claims, source and required next step before testing. Include normal wording, a paraphrase, an exception, missing information, contradictory content and a request for an unauthorized action.

Inspect both retrieval and generation

Where the platform exposes retrieved passages, inspect them alongside the answer. Wrong source: investigate content selection and retrieval. Correct source but wrong answer: investigate interpretation and response rules. If retrieval is hidden, record that limitation and avoid claiming you know the cause.

Use a safe response to uncertainty

A suitable response may explain the known policy, state the missing fact and offer human review. It should not turn an estimate into a promise. A citation is useful only when the referenced source actually supports the answer and its conditions.

Test attempts to override the rules

Include requests such as ignore the policy and guarantee approval. Check that the assistant keeps its boundary and provides a valid next step. A few passed tests are evidence for those cases, not a security guarantee for every possible prompt.

Acceptance example

For the Friday-launch question, a pass includes the ten-business-day estimate and readiness conditions, makes no Friday guarantee and routes to project review. A response that merely links the source but promises Friday is a fail.

04 / WORK THROUGH THE DECISION**Make maintenance part of the workflow****Publish with an owner and change record**

Record what changed, why, who approved it, the source version and which answer cards depend on it. Confirm how the platform refreshes or removes content. Changing the website does not prove the assistant has already refreshed its knowledge.

Retest the affected questions

After a policy update, re-run the relevant tests and check for stale answers. Keep the previous approved version and a recovery route. If the assistant still gives obsolete commitments, limit the affected use case while the problem is resolved.

Measure supported answers, not fluency

For the fixed test set, classify answers as pass, fail or unresolved. Record unsupported claims, missing conditions, incorrect sources and failed handoffs separately. A fluent response is not a pass; unverified answers should not silently become successes.

Prioritize gaps from real use

Log unanswered topics without unnecessary personal data. Group recurring questions, choose the most decision-relevant gap and ask its owner for an approved answer. Review frequency should follow policy volatility and risk, not a universal calendar rule.

Hypothetical score

Of twelve fixed questions, nine pass, two fail and one remains unresolved: pass rate is $9/12 = 75\%$. Do not omit the unresolved case to report $9/11$. This describes only that test set; it is not a live customer resolution rate or proof of business impact.

05 / FILLABLE WORKSHEET

Your working brief

Use short notes. Keep detailed evidence in your own files and paste the reference here. Do not enter passwords, customer identifiers or confidential client data.

Audience / first task / questions / excluded topics

Source register: title / URL / owner / approval / dates

Answer card: answer / conditions / exceptions / unknowns

Approved next action + human handoff owner

Permissions / refresh method / facts still needing approval

06 / FILLABLE WORKSHEET

Your test record + decision

Use short notes. Keep detailed evidence in your own files and paste the reference here. Do not enter passwords, customer identifiers or confidential client data.

System / date / source version / test question

Expected facts + forbidden claims + required next step

Retrieved evidence if available / response / source check

Pass, fail or unresolved? Specific reason

Correction owner / content or configuration change

Retest result / approval / next review trigger

07 / DECISION CHECKLIST + FURTHER READING

Finish the test, then choose your next step

- ☐ Sources are approved for the intended audience.
- ☐ Answers preserve conditions, exceptions and unknowns.
- ☐ Account actions and confidential data remain outside this pilot.
- ☐ Test results include failures and unresolved cases.
- ☐ A named owner can update, remove and retest obsolete content.

Make the next action specific

If the workflow passes your requirements, compare current plans and verify the remaining limits before subscribing. If it fails, revise the brief or consider an alternative. You do not need to purchase software to use this workbook.

Explore the evidence and current details

[AI knowledge base for small business](#)

[AI employees for small business](#)

[Read the Vyneta Parallel AI review](#)

[Explore Vyneta practical guides](#)

Editorial note: Original worksheets drafted with AI assistance and checked for internal consistency. Examples and calculations are hypothetical unless explicitly identified otherwise. This workbook does not establish hands-on experience with every vendor or validate a vendor's claims.

Disclosure: Linked Vyneta articles may contain affiliate links. Vyneta may earn a commission if you purchase through those links. Recommendations should be assessed against your requirements. This is an independent Vyneta resource, not an official vendor manual.

Use permission: Vyneta permits personal and internal business use and editing of these worksheets. Do not resell the workbook or claim it as an official vendor product. Product names belong to their respective owners. Check current vendor documentation before acting.