



Reporting Assistant (Closed Beta)

Release Overview

Reporting Assistant is an AI-powered conversational experience designed to help Reporting Admins find, run, and explore existing reports using natural language. It simplifies report discovery and interpretation by reducing navigation complexity and technical report knowledge requirements.

What is the value?

Reporting Administrators often spend significant time navigating complex reporting menus and deciphering technical report names in order to find the right data. This creates friction, slows decision-making, and increases cognitive load.

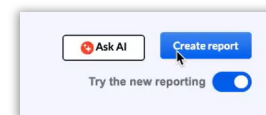
Reporting Assistant removes this friction by enabling users to ask questions conversationally. It automatically suggests relevant reports, confirms user intent, and highlights key insights from report data — helping admins move more quickly from question to actionable insight.

Top Features

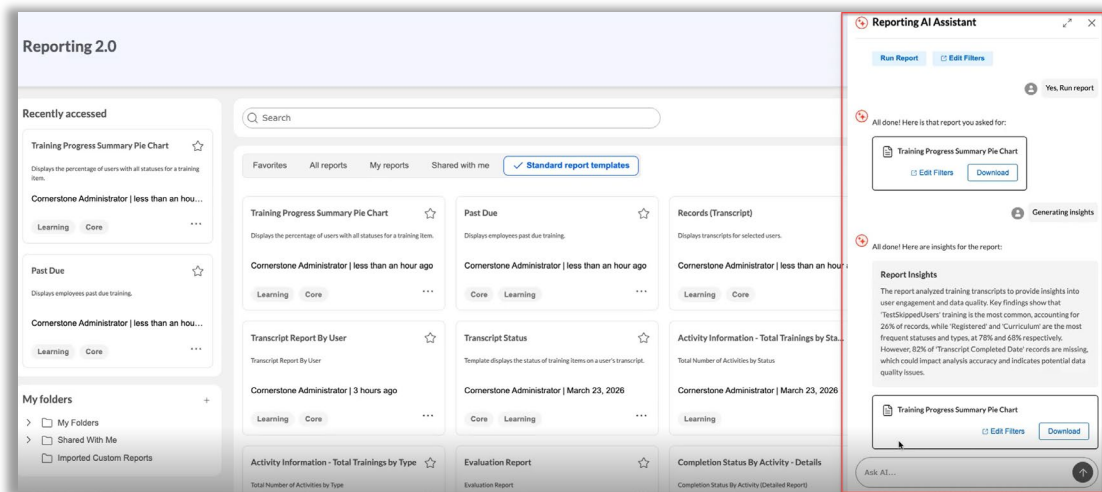
- Conversational interface to ask for reports
- Automatically generated insights for reports
- Ability to converse with reports

How It Works

- Admins can invoke the Reporting Assistant by clicking on the Ask AI button on the top right corner of the Reporting 2.0 Landing Page.
- A dialog box will open and admins will be able to start interacting with the Reporting Assistant. Some predefined prompts will be immediately available, such as:
 - Find a Transcript report
 - Show me past due reports
 - How do I use Reporting AI
- Admins will be able to interact with the Reporting Assistant with natural language questions, to find and explore reports based on existing access → **created by them, shared with them and templates.**
- Users interact with the assistant using natural language queries to find and explore reports they already have access to.



- *Real interaction example: when asked “Find Training progress Summary Pie Chart”, the assistant will bring out a list of existing reports from which the admin can then select the one they’re interested in. The assistant will then continue to chat with the user in natural language, showing a list of filters that were applied to the report last time it was consulted, asking if the user wants to edit them or run the report as is.*



- *Once the report has run, the user can download it or continue to interact with the assistant, for example asking which fields are included in the report, requesting the breakdown of completed training based on Transcript Status and so on.*

Availability & Enablement

This is a Closed Beta, available only to a targeted set of customers and currently not open to additional customers.

What This Is Not

- This is not a tool to create new reports or modify report definitions.
- This is not a replacement for Reporting 2.0 permissions or access controls.
- This does not expose data outside of reports the user already has access to. **Reporting 2.0 permissions and constraints are respected.**

Considerations & Exclusions

- The Reporting 2.0 Landing Page must be activated in order to be able to use the Reporting Assistant. The Reporting 2.0 Landing Page can be activated with the “Try new reporting” toggle available on the top right corner of the legacy Reporting 2.0 home page.
- Reporting Assistant is available only in English.
- No new reporting fields are created with this enhancement.
- For this phase, Reporting Assistant will only consider Transcript reports.
- For more information about our AI Policy and AI Security Policy, visit <https://trustcenter.cornerstoneondemand.com>

