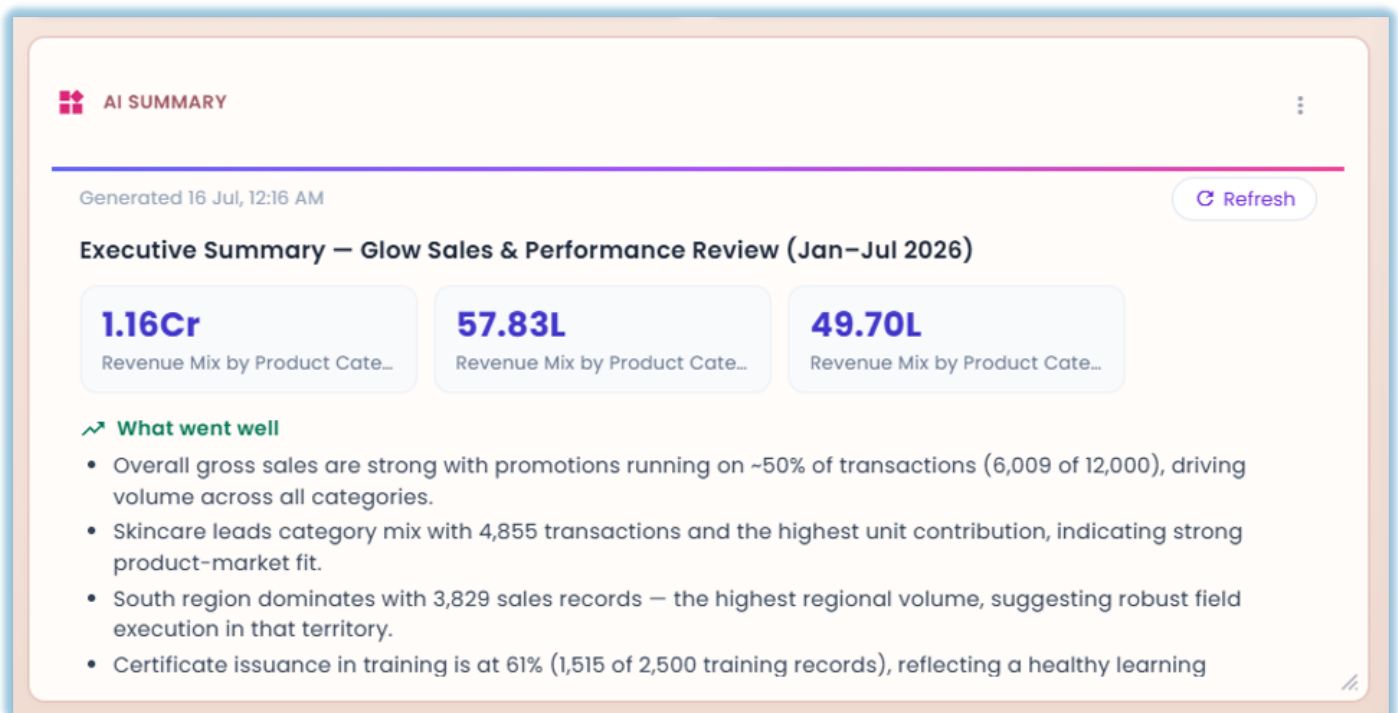


How do I configure an AI summary widget?

Overview

An AI summary widget turns your dashboard data into a written summary, which you can optionally point at something specific with your own Focus prompt.



When to Use

Use this feature when:

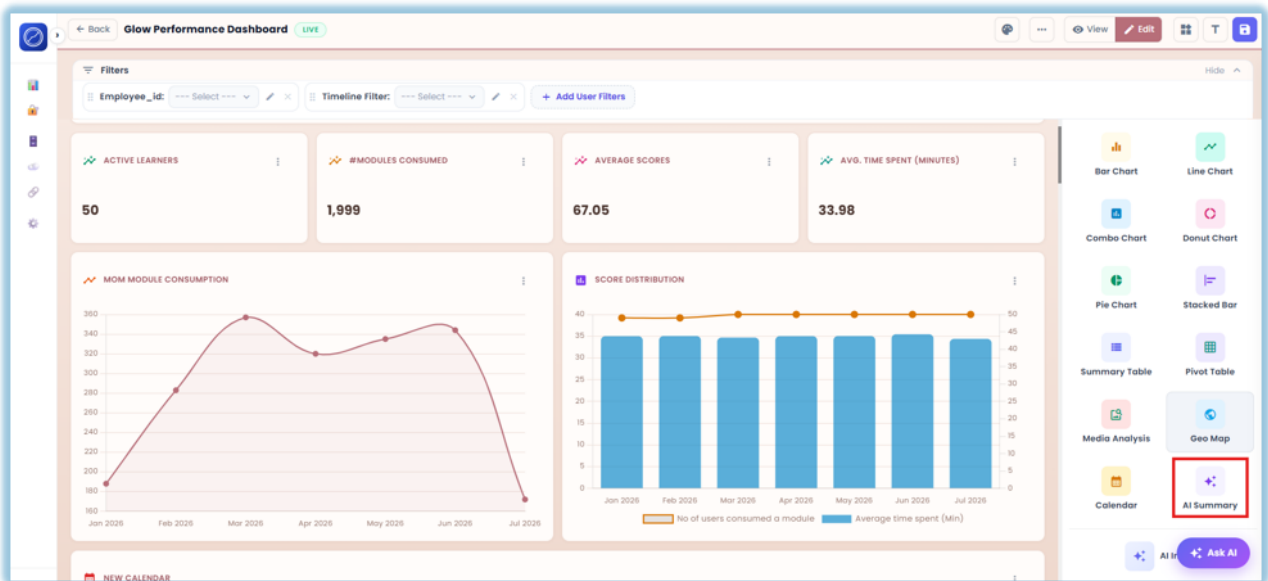
- You want a narrative summary of what's happening in your data, not another chart or table
- You want to point that summary at something specific — a metric, a time period, a comparison — using your own instructions

Concepts

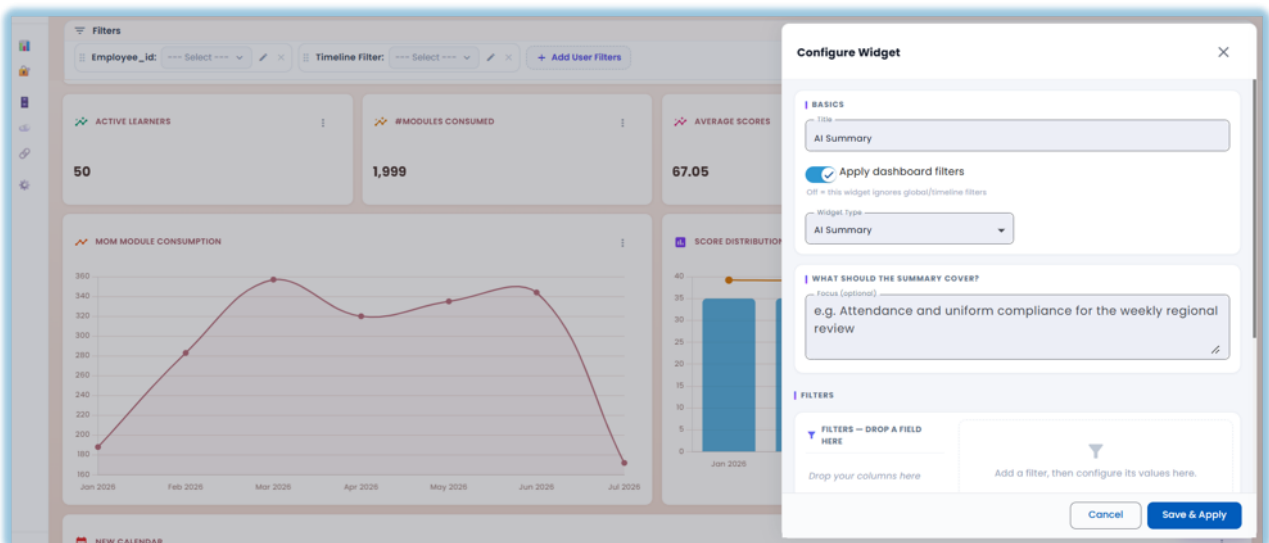
- AI Summary Widget – A widget that generates a written summary of your dashboard data
- Focus – An optional prompt where you tell the AI what the summary should cover, such as "Attendance and uniform compliance for the weekly regional review"; leave it blank for a general summary
- Filters – Conditions you can drop columns into on this widget, configured the same way as other widgets' filters

Set Up Guide

1. Go to a dashboard and click Add Widget, then set the Title and turn on Apply Dashboard Filters as usual
2. Choose the Widget Type — AI Summary



3. Under "What should the summary cover?", optionally enter a Focus — tell the AI what to summarize, such as "Attendance and uniform compliance for the weekly regional review"; leave it blank for a general summary



4. Under Filters, drop in any columns you want to filter by and configure their values
5. Click Save & Apply

Best Practices

- Write a specific Focus instead of leaving it blank — a vague or empty Focus gives a vague, general summary; a specific one (a metric, a time period, a comparison) gives a sharper one
- Treat the summary as a starting point, not a cited fact — it doesn't link back to the underlying records, so verify anything important by drilling into the data yourself
- If you want the summary to respect the dashboard's filters, keep Apply Dashboard Filters turned on — turning it off means the widget only sees its own Filters section

Related Links/FAQs

Related pages in this book:

- What widget types are available in Vantage?
- How do I configure a media analysis widget?

FAQs

What's the difference between an AI Summary widget and the Ask AI chat?

Ask AI is a separate chat-style tool for asking one-off questions. An AI Summary widget is configured once, with an optional Focus prompt and its own Filters, and then sits on the dashboard like any other widget.

Does an AI summary widget link back to the records it's based on?

No — there's no citation or source link back to the underlying rows. If you need to verify an answer, drill into the data yourself.

Version Notes

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