MatrixFlows

FREE RESOURCE · KNOWLEDGE MANAGEMENT

AI-Ready Documentation Toolkit

Retrieval flow, metadata checks and an evaluation worksheet for AI answers.

Companion to the full guide at matrixflows.com/blog/how-to-write-support-documentation-for-ai

How to use this kit. Print it, or copy the tables into your own spreadsheet. Every example row is illustrative; replace it with your own content. The full explanation for each section is in the guide at matrixflows.com/blog/how-to-write-support-documentation-for-ai.

01 How retrieval works

Here is the whole loop in one picture.

```
Illustrative: real systems differ in order and implementation.

source content
   |
   v
validation and metadata (owner, product, version, audience, verified)
   |
   v
indexing (split into sections)
   |
   v
retrieval (+ metadata filters: product, version, language)
   |
   v
permission filtering (only what this reader may see)
   |
   v
grounded answer with citations (or "no answer")
   |
   v
evaluation and feedback (test set, reader flags, gaps)
   |
   +--> back to source owners to fix content
```

02 Add metadata the assistant can filter on

Metadata lets retrieval narrow candidates before it ranks them. Record these for every article:

Field	Example	Why It Matters For Retrieval
Product	Example Device	Stops a question about one product pulling passages about another.

Field	Example	Why It Matters For Retrieval
Audience	Customer admin	Separates end-user, admin, partner and internal content so each reader gets the right depth.
Language	en	Lets the assistant answer from the language the reader uses and shows where translations are missing.
Version applicability	Firmware 4.2 and later	Prevents an answer for a new release being given to someone on an old one.
Owner	Support enablement team	Someone is accountable when a reader or a test flags the article.
Last reviewed	2026-10-14	Lets you filter for stale content and prioritise review.

03 Evaluate answers with a test question set

Track results in a worksheet you can copy. The rows below are illustrative.

Question	Expected Source	Expected Answer	Actual Result	Failure Type	Corrective Action
How do I fix E41 on 3.2?	Resolve device pairing error E41	Same Wi-Fi band, Add device, hold button 3s	Correct, cited		
E41 on version 2.4?	Resolve pairing errors (2.x)	Use the 2.x steps	Gave 3.2 steps	wrong version	Add Applies to line; filter by version
Where is the admin audit log?	Admin audit log (customer)	Settings > Audit log	Quoted an internal runbook	permission leak	Mark runbook audience: staff; re-index
Can Example Device pair with 5 GHz?	Supported networks	Yes, on 3.2 and later	Says all versions	unsupported claim	Add version scope; require citation
Can you refund my last invoice?	none	Decline and hand off to billing	Invented a refund policy	should have refused	Add no-answer rule for billing; test again

Your worksheet: Evaluate answers with a test question set

Question	Expected Source	Expected Answer	Actual Result	Failure Type	Corrective Action

04 Worked example: from messy article to AI-ready

Before

```
Pairing problems

Sometimes the device doesn't pair and shows an error. We've changed
this over the years. Try the usual fixes (see the other article) and
restart things. It might take a while. In newer versions it is better.
Note: if E41, ask Dev, known bug on batch 7 - internal only.
```

After

First the metadata block. This is an illustrative schema, not a claim that every platform uses YAML or these exact fields; use whatever your platform stores, as long as the same facts are recorded.

```
title: Resolve device pairing error E41
product: Example Device
versions: ["3.2"]
audience: customer
language: en-US
content_type: troubleshooting
status: verified
owner: Product Support
last_verified: 2026-11-16
review_trigger: Firmware change
```

Then the article text:

```
Resolve device pairing error E41

This article helps customer admins fix error E41 when pairing an
Example Device on version 3.2. For other versions, see "Resolve
pairing errors (version 2.x)".

## Cause
Error E41 appears when the device and the app are using different
network bands during pairing.

## Fix error E41 on version 3.2
1. Move your phone to the same Wi-Fi band as the device.
2. In the app, open Devices, then Add device.
3. Hold the device button for three seconds until the light blinks blue.
4. Wait for the light to turn solid green.

## If error E41 persists
Reset the device (hold the button for ten seconds) and repeat the
steps. If the error remains, contact support with the device serial
number.
```

Three test questions and expected answers

Question	Expected Answer	Must Cite
My Example Device on 3.2 shows E41 when I pair it. What do I do?	Put the phone on the same Wi-Fi band as the device, start Add device in the app, hold the button for three seconds, wait for solid green.	Resolve device pairing error E41
E41 keeps coming back after those steps.	Reset the device by holding the button for ten seconds and repeat; if it still fails, contact support with the serial number. No mention of batch numbers or internal causes.	Same article, "If error E41 persists"
How do I fix error E41 on version 2.4?	Does not apply the 3.2 steps. It states that it only has guidance for 3.2 (or points to the version 2.x article if one exists) and otherwise says it has no answer.	No citation, or the version 2.x article

05 AI-readiness checklist

Copy this into your review template and score each article.

```
AI-READINESS CHECKLIST (per article)

STRUCTURE
[ ] One task or question per article
[ ] Outcome and scope stated early
[ ] Headings say what the section contains
[ ] Each section makes sense read alone (no "see above")
[ ] Product, feature and role names match the UI and glossary

SOURCES
[ ] Each fact lives in one article; others link to it
[ ] No duplicate or superseded copy is published
[ ] Conflicts with other articles resolved by a person
[ ] Verified by a named person, with date

METADATA
[ ] Product   [ ] Audience   [ ] Language
[ ] Version/plan applicability (metadata AND first lines of text)
[ ] Owner     [ ] Last reviewed date

PERMISSIONS
[ ] Audience set; internal content not in public articles
[ ] Tested as anonymous, customer and staff reader

EVALUATION
```

```
[ ] At least 3 real questions mapped to this article
[ ] Correct answer, correct citation checked
[ ] Out-of-scope question returns a clear "no answer"
```