TRAINING GUIDE

# Data Models and Orchestrator AI

**Smart Vendor & Procurement System**
redSling Data Models and Orchestrator AI

Define the Vendor data model manually, then use Orchestrator AI to analyze project requirements, review proposed data structures, and coordinate application setup.

## 1 Open Create Data Model

Open the project's data model creation workspace. Define a **Vendor** model to store vendor identification, status, ownership, creation date, and contact details.

## 2 Configure the Vendor fields

| Property | Setting |
|---|---|
| vendor_name | String - vendor name |
| vendor_type | String - vendor type or category |
| status | String - current vendor status |
| created_by | Reference - select user as the reference table |
| created_at | Date-Time - date and time associated with the record |
| contact_person | String - vendor contact name |
| contact_email | String - vendor contact email |
| contact_phone | String - vendor contact phone |

## 3 Review the user reference

Set **created_by** to the **Reference** field type and select **user** as the reference table. This links each vendor record to the corresponding user.

## 4 Create the model

Review all eight field names and types. Confirm the user reference and Date-Time field, then select **Create Model** to create the Vendor model for use in the project.

# Analyze Requirements with Orchestrator AI

## 5 Open the project and choose a mode

Open **Orchestrator AI** for the existing **SmartVendorWeb** project. Orchestrator reviews supplied material, identifies gaps, and coordinates the next steps across the application.

| Property | Setting |
| --- | --- |
| Manual Assistive | Acts when explicitly requested. Suggestions and recommended actions wait for approval. |
| Autonomous | Can carry out its plan as it progresses. Data deletion, deployment, and backend configuration changes still require confirmation. |

Use **Manual Assistive** mode for this walkthrough.

## 6 Provide project material

Upload requirements documents, notes, screenshots, brand guidelines, spreadsheets, or other supporting files. You can also describe the project in text or add a reference link to a website or specification.

For this example, supply notes describing the **Smart Vendor and Procurement System**. Select **Analyze my material** to begin identifying business areas, workflows, and data requirements.

## 7 Review clarifying questions

Review questions about supported user roles, whether Finance is an internal feature or integrates with an external accounting or ERP system, branding requirements, and the preferred authentication method. Answer where information is available, or skip questions that can remain unresolved at this stage.

## 8 Review project understanding and confidence

Check that the proposed goals cover vendor and procurement management, purchase requests, approvals, purchase orders, purchased assets, incidents, maintenance, and vendor invoices.

Review confidence levels for workflows, data, user roles, integrations, branding, and sign-in. Lower confidence indicates inferred information that may need further clarification before implementation.

# Review and Create the Proposed Models

## 9 Review the identified data requirements

Check the entities identified from the project material: **vendors**, **purchase requests**, **approvals**, **purchase orders**, **products**, **incidents**, **maintenance records**, and **invoices**. Review the relationships needed to support the application workflows.

## 10 Review the Setup Plan

Review the proposed application blueprint, data models, data tables, user types, and login flow. In the example, the plan also proposes an **Approval Queue** screen for procurement approval decisions and enhancements to existing screens where appropriate.

## 11 Review the proposed data tables

| Property | Setting |
| --- | --- |
| product | Product name, SKU, description, category, preferred vendor, unit price, currency, and active status |
| approval | Link between procurement requests and approvers; approval sequence, status, decision notes, submission date, and decision date |

Check the proposed structures before proceeding with creation.

## 12 Create the required tables

Request the reviewed table creation step in the assistive workflow. Review the models created by Orchestrator and the status of each setup action. Completed actions can be reviewed or undone from the plan where available.

## 13 Review skipped steps and Activity

Check any skipped or omitted steps. In the example, deciding user types and generating the login flow are skipped. Branding requirements remain incomplete because no brand document or logo was supplied in that demonstration.

Open **Activity** to review the history of material analysis, project understanding, clarifying questions, and setup actions.

## Final review

Confirm the Vendor model fields and user reference, review the AI's proposed entities and relationships, check the product and approval models, and resolve any remaining setup gaps before continuing development.