

Adding the Al-Generated Regulatory Summarization Feature to a Form

Last Modified on 09/23/2025 4:50 pm EDT

Overview

The Al-Generated Regulatory Summarization feature uses Al/ML to summarize regulation statements, making them easier for users to interpret and understand.

User Account Requirements

The user must have Administrator permissions to edit configurable forms.

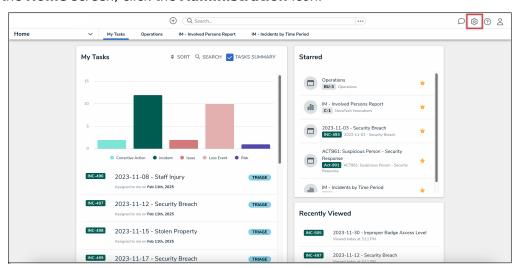
Related Information/Setup

For more information on self-enabling this feature on your Org, please refer to the Enabling the Al-Generated Regulatory Summarization Feature on an Org article.

For more information on using configurable forms in Resolver, please refer to the Configurable Forms section.

Navigation

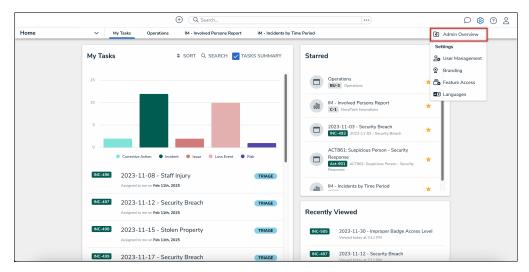
1. From the *Home* screen, click the **Administration** icon.



Administration Icon

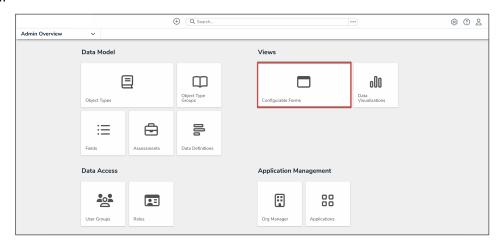
2. From the Administrator settings menu, click the Admin Overview link.





Administrator Settings Menu

3. From the *Admin Overview* screen, click the **Configurable Forms** tile under the **Views** section.



Configurable Forms Tile

4. On the *Configurable Forms* screen, from the list of forms, click the form that you want to add the Regulatory Summarization feature to.

Adding the Regulatory Summarization Feature to a Form

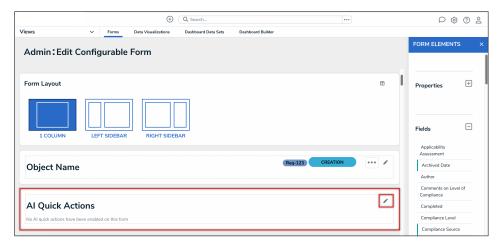


Note:

The Regulatory Summarization feature can only be added to Requirement, Requirement Detail, and Sub-Topic object type forms.

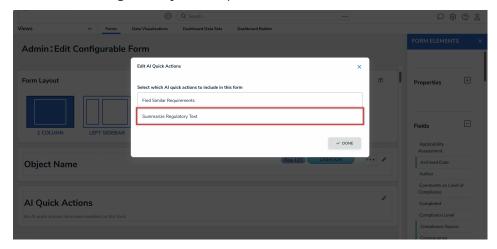
1. From the AI Quick Actions section of the form, click the Edit AI Quick Actions icon.





Edit AI Quick Actions Icon

2. Click the **Summarize Regulatory Text** option to select it.

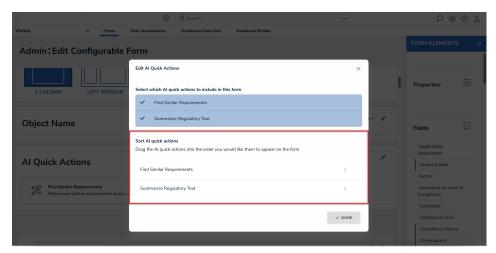


Summarize Regulatory Text Option



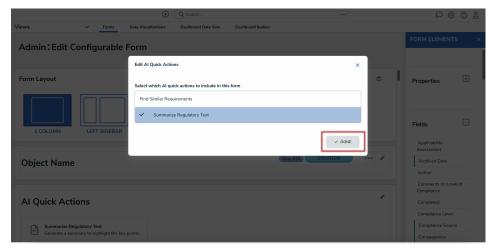
3. (Optional): If there is already an Al Quick Action enabled on the form, from the Sort Al Quick Actions section, click the Reorder icon to drag the Al Quick Actions into the order you would like them to appear on the form.





Sort AI Quick Actions Section

4. Click the **Done** button to save your changes.

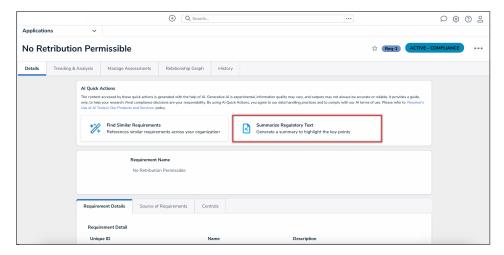


Done Button

Using the Regulatory Summarization Feature on a Form

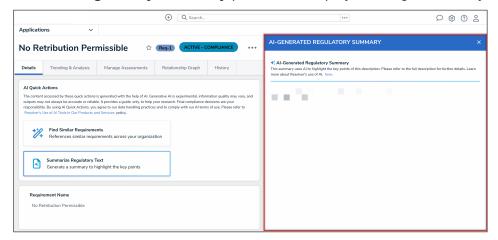
- 1. Navigate to a form that you added the Regulatory Summarization feature to.
- 2. From the AI Quick Actions card, click the Summarize Regulatory Text button.





Summarize Regulatory Text Button

3. An Al-Generated Regulatory Summary palette will display showing a summary.



Al-Generated Regulatory Summary Palette

Important Notes

- The summary cannot be edited by a user.
- The summary doesn't persist amongst users; this means that each user who reviews a form will have to generate their own summary.
- The summary is not eligible to be exported on to reports.
- The summary is not available in an Org's Data Warehouse.