



Collibra Data Intelligence Cloud
AI Governance

Collibra Data Intelligence Cloud - AI Governance

Release date: February 4, 2024

Revision date: February 02, 2024

You can find the most up-to-date technical documentation on our Documentation Center at

https://productresources.collibra.com/docs/collibra/latest/Content/AIGovernance/to_ai-governance.htm

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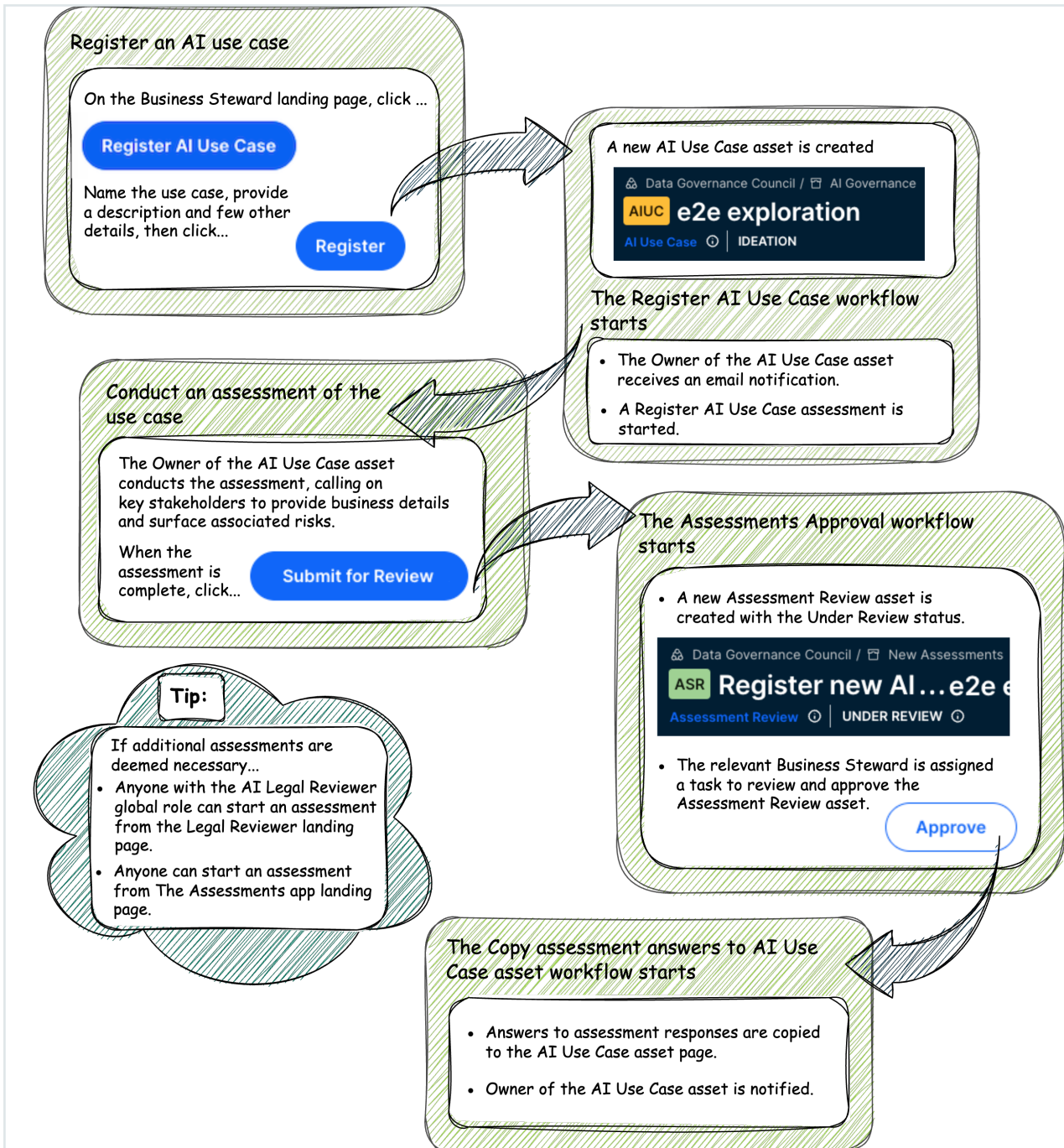
Collibra AI Governance walk-through (Beta)

Collibra AI Governance offers a holistic end-to-end view of all your organization's AI projects, and is designed to help you with the following:

- Improve your organizational access to, and adoption of, AI systems.
- Promote visibility, productivity, compliance and accountability around AI use cases.
- Mitigate the data privacy, intellectual property and ethical risks associated with AI.
- Prevent the duplication of efforts in the development and adoption of AI systems.
- Drive meaningful business evaluations of AI use cases prior to investing in them.
- Provide cross-functional collaboration, to address the internal use of AI systems for common business functions.

Let's walk through the process flow

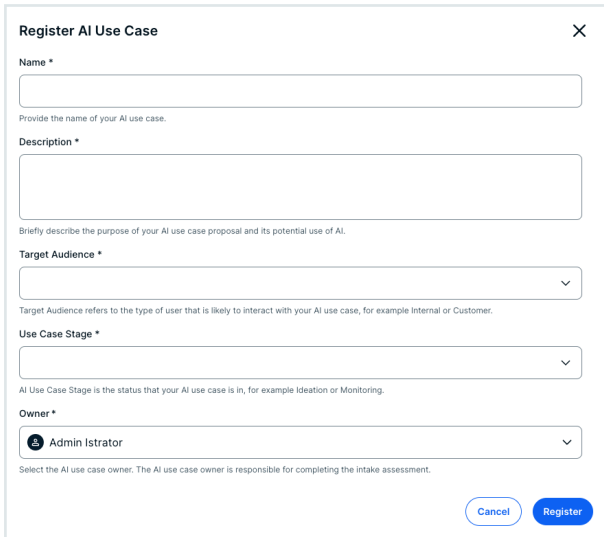
This topic describes the Collibra AI Governance process flow, from registering a use case, to collaborating to assess the use case, and finally approving the Assessment Review asset.



The process starts with an AI use case

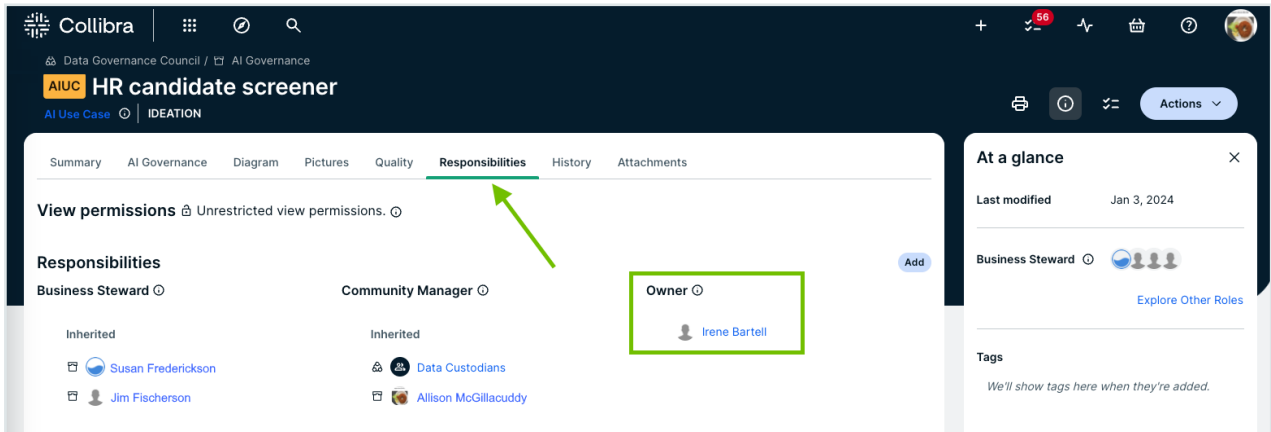
A Business Steward kicks off the process by registering the use case. On the Business Steward landing page, click **Register AI Use Case**. In the **Register AI Use Case** dialog box, you need only provide a name and description, describe the audience and status, and assign an owner. That's it.

The Owner of the use case is tasked with leading the collaborative effort in completing an assessment of the use case and ultimately approving the assessment.



The form is titled "Register AI Use Case" and contains several fields: "Name *", "Description *", "Target Audience *", "Use Case Stage *", and "Owner *". The "Owner *" field is currently set to "Admin Istrator". There are "Cancel" and "Register" buttons at the bottom right.

You can view the Owner and all other assigned responsibilities in **Responsibilities** tab on the AI Use Case asset page.

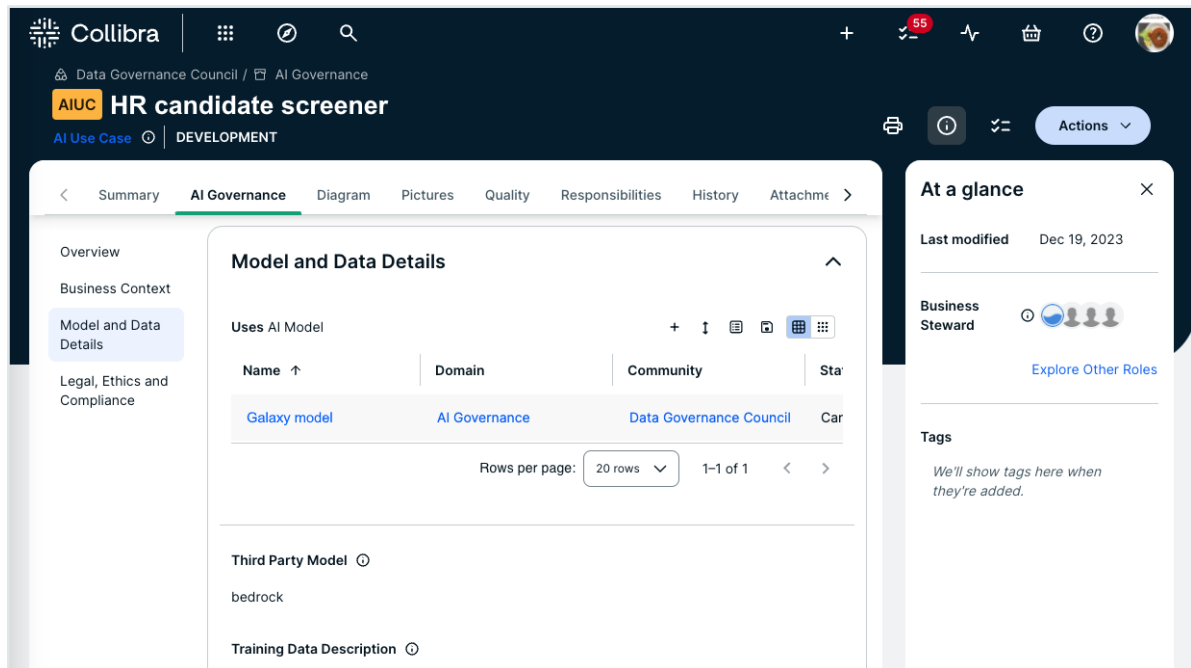


Tip AI Governance aims to remove the burden and the intimidation for Business Stewards who want to [register AI use cases](#). This first step is often the biggest hurdle. The objective at this point is simply to register the use case. Don't worry if you don't know all of the details relative to the use case. Once the use case is registered, providing the details of the business value and associated risks is a collaborative effort.

Registering the AI use case

When you click **Register**, two things happen:

- An AI Use Case asset is created. The [AI Use Case asset page](#) is a working record where you and your colleagues can collaborate as the use case evolves, to capture critical details as they become known. The asset page is intended to be a single source of truth, where stakeholders can quickly find the business value of the project and all associated risks.



- The [Register AI Use Case](#) workflow is triggered.
 - A new [assessment](#), which is linked to the newly created AI Use Case asset, is started.
 - The Owner of the AI Use Case asset receives an email notification and is prompted to [conduct](#) the assessment of the use case.

AI Use Case asset page: your single source of truth

Use cases tend to evolve over time. The AI Use Case asset page is intended to be your single source of truth, where stakeholders can collaborate and stay informed of modifications to the use case. When it's time to review and approve the use case, every stakeholder involved in the project has easy access to all of the business and technical information needed to complete the evaluation, including:

- The business case.
- The business value description.
- Information about the training and inference datasets, their categories, sources, quality and lineage.
- The AI models at the center of the use cases.
- Legal and Privacy teams' insights on associated risks.
- Links to the assessment, or assessments, conducted with respect to the use case.
- The stakeholder roles and responsibilities associated with the use case, for example Legal Steward, Privacy Steward and Data Protection Officers.
- Any inference and training data.

The out-of-the-box AI Governance domain: your AI use case register

AI Governance comes with the out-of-the-box AI Governance domain. Consider this your AI use case register. All AI Use Case assets are created in this domain, providing you with a complete and detailed accounting of all AI use cases.

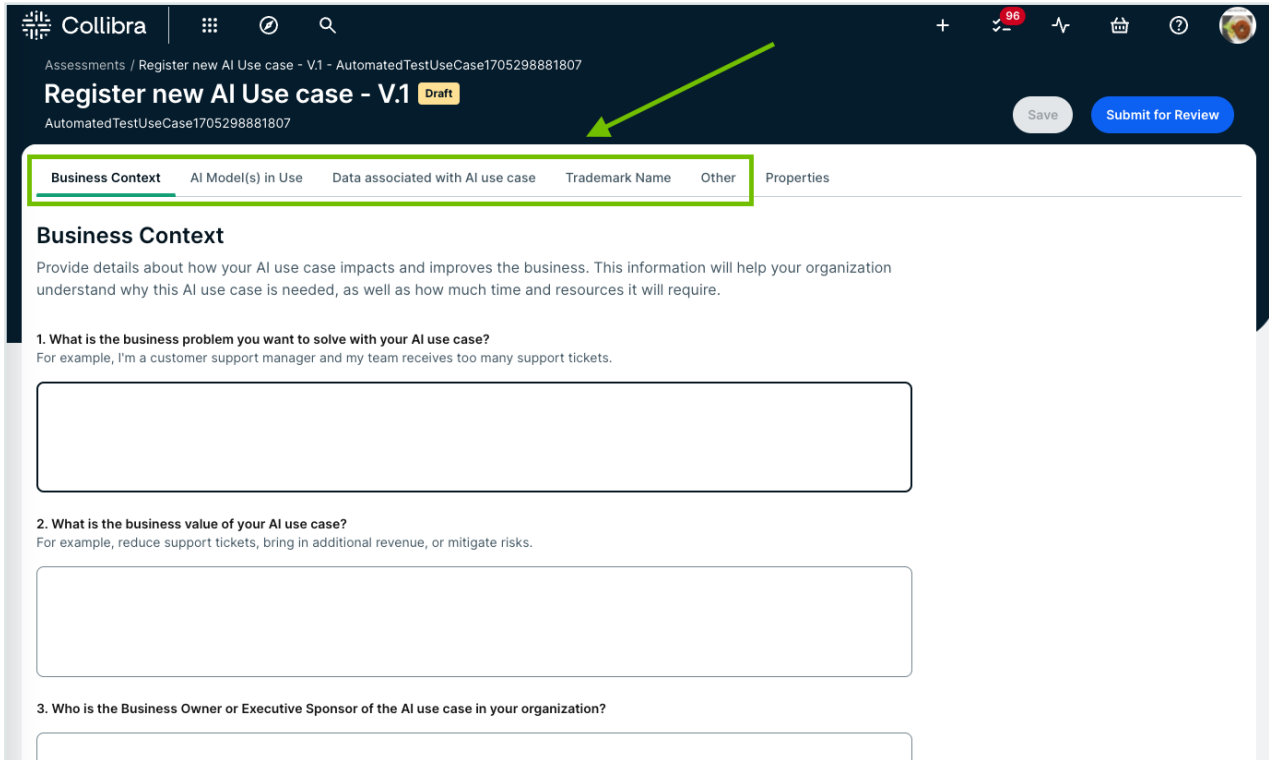
The screenshot shows the Collibra AI Governance interface. At the top, there's a navigation bar with 'Collibra' logo, search icons, and user profile. Below that, the 'AI Governance' domain is selected, showing 'Business Asset Domain' and 'Business Stewards: Amar Bo & Judith Loight'. A 'Legal' filter is applied, and 'Show All (8)' is visible. The main content area has tabs for 'Overview', 'Assets', 'Responsibilities', 'History', and 'Attachments (0)'. The 'Assets' tab is active, showing a 'Default AI governance view' with a 'Select View' dropdown. Below the view selector are 'Delete', 'Move', and 'Validate' buttons. The table below lists AI Use Case assets with columns for Name, Status, Asset Type, Domain, Created on, Last modified on, and Created by.

Name	Status	Asset Type	Domain	Created on	Last modified on	Created by
HR candidate screener	Development	AIUC AI Use Case	AI Governance	12/18/2023, 1:48 PM	12/19/2023, 5:30 PM	Melissa Talbot
AI Development	Ideation Anita Wilson	AIUC AI Use Case	AI Governance	01/10/2024, 6:29 AM	01/10/2024, 6:29 AM	Anita Wilson
Description generator	Ideation	AIUC AI Use Case	AI Governance	01/2/2024, 3:15 PM	01/2/2024, 3:15 PM	Melissa Talbot
Script Gen	Ideation Gerri Yarborough	AIUC AI Use Case	AI Governance	01/2/2024, 3:15 PM	01/2/2024, 3:15 PM	Gerri Yarborough
ID generator	Ideation	AIUC AI Use Case	AI Governance	01/10/2024, 6:28 AM	01/10/2024, 6:28 AM	Melissa Talbot
ID editor	Monitoring	AIUC AI Use Case	AI Governance	01/10/2024, 6:29 AM	01/10/2024, 11:15 AM	Admin Istrator
Schedule manager	Ideation	AIUC AI Use Case	AI Governance	01/8/2024, 1:06 PM	01/8/2024, 1:06 PM	Roger Yaeger
Search test	Ideation	AIUC AI Use Case	AI Governance	01/5/2024, 1:15 PM	01/5/2024, 1:15 PM	Anita Wilson

Assessments: a tool for driving collaboration

The Owner is responsible for driving the assessment, but collaboration from Analytics, Data Offices, Legal and Privacy teams, and so forth, is essential to ensuring that all critical details and associated risks are identified and recorded. The out-of-the-box Register New AI Use Case assessment in the Template Gallery aims to elicit the following considerations:

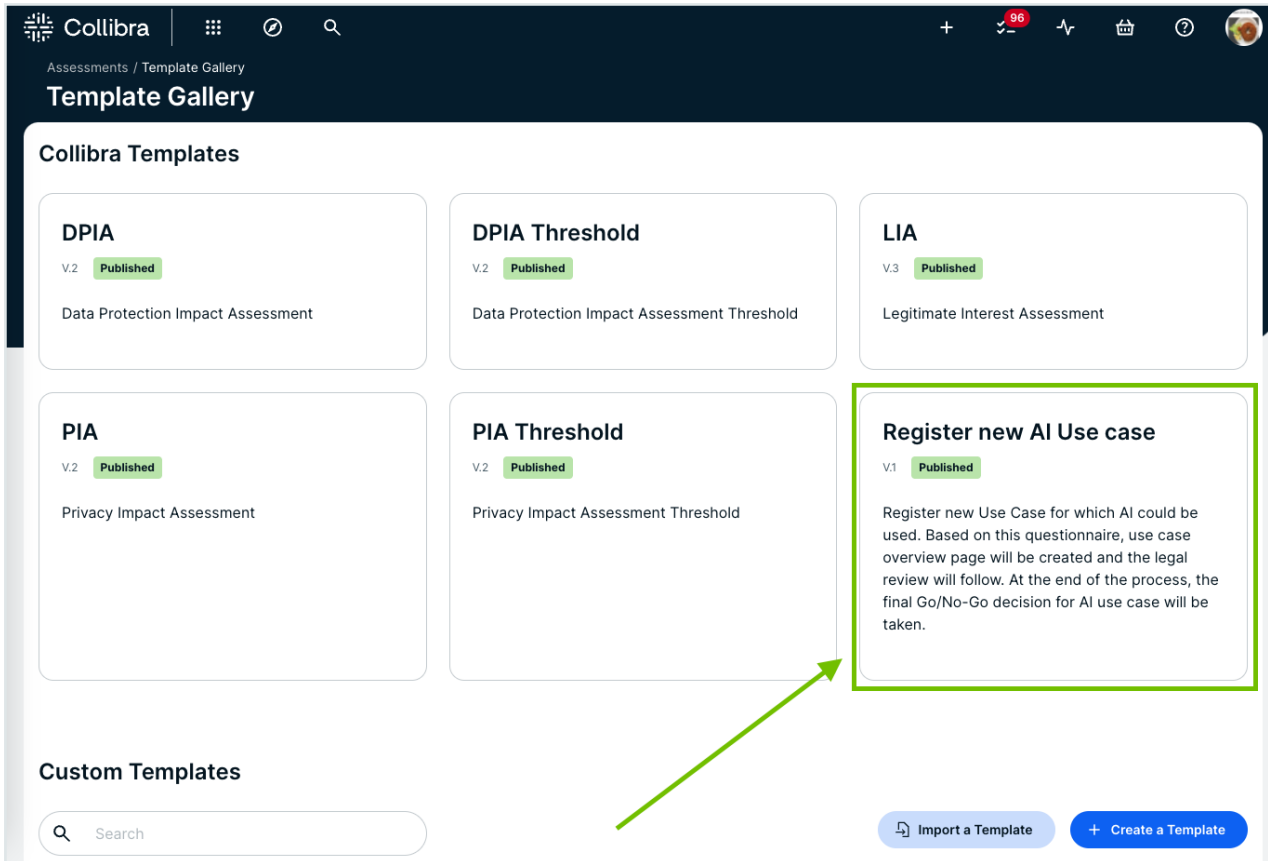
- **Business context:** details about how your AI use case impacts and improves the business.
- **AI Model(s) in use:** details about the AI model(s) that will be used in your AI use case.
- **Data associated with the AI use case:** details on the data you will use and collect with your AI use case.
- **Trademark name:** potential names you would like your Legal team to submit for trademark review.



Collibra AI Governance leverages Collibra Assessments

AI Governance uses the Collibra Assessments app and features, to enable stakeholders to add essential details to your AI use cases and document associated risks.

The Template Gallery in the Assessments app comes with the Register New AI Use Case assessment template. This template was designed with insights obtained from extensive research and interviews with Collibra users and data professionals, to elicit critical input and considerations from the key stakeholders in your organization.



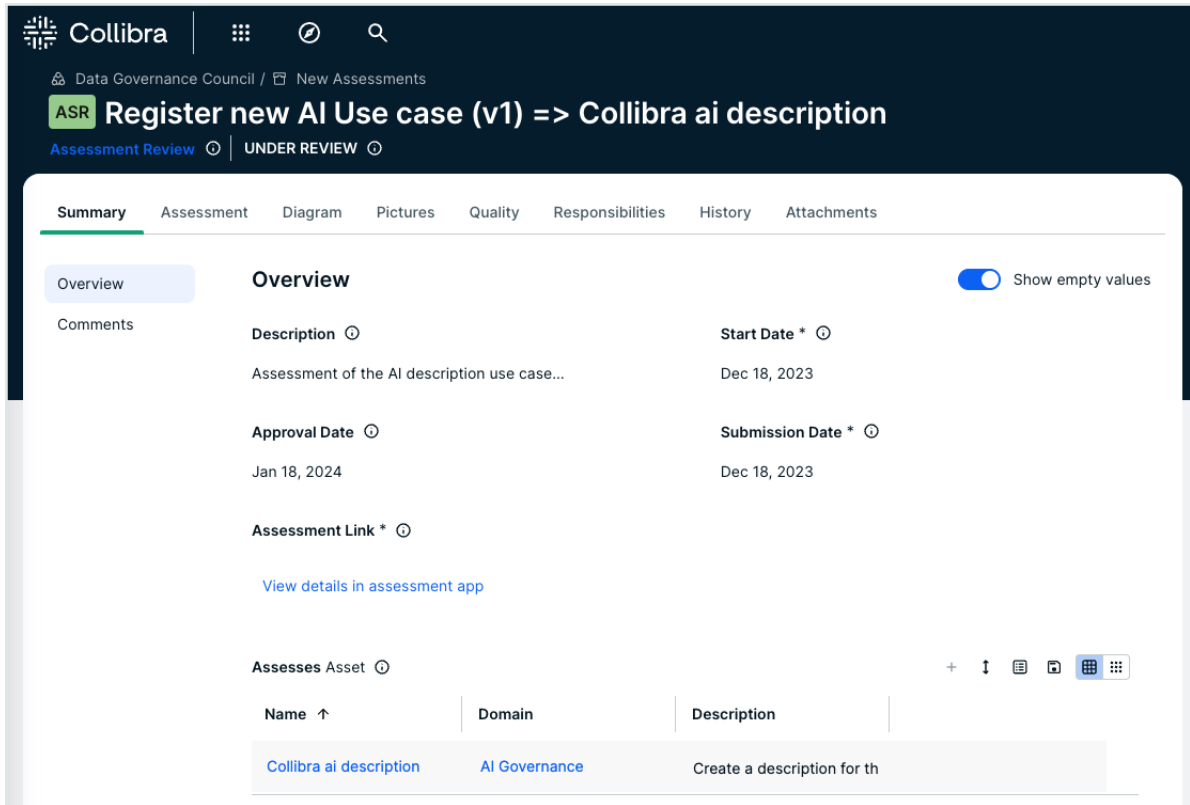
Important

- If you start an assessment from the [Assessments app landing page](#), we strongly recommend that you select the out-of-the-box Register New AI Use Case template. If you select any other template, the [Copy assessment answers to AI Use Case asset](#) won't run and the assessment responses won't be copied over to the AI Use Case asset page.
- If you start an assessment from the [Legal Reviewer landing page](#), the Register New AI Use Case template is automatically used.

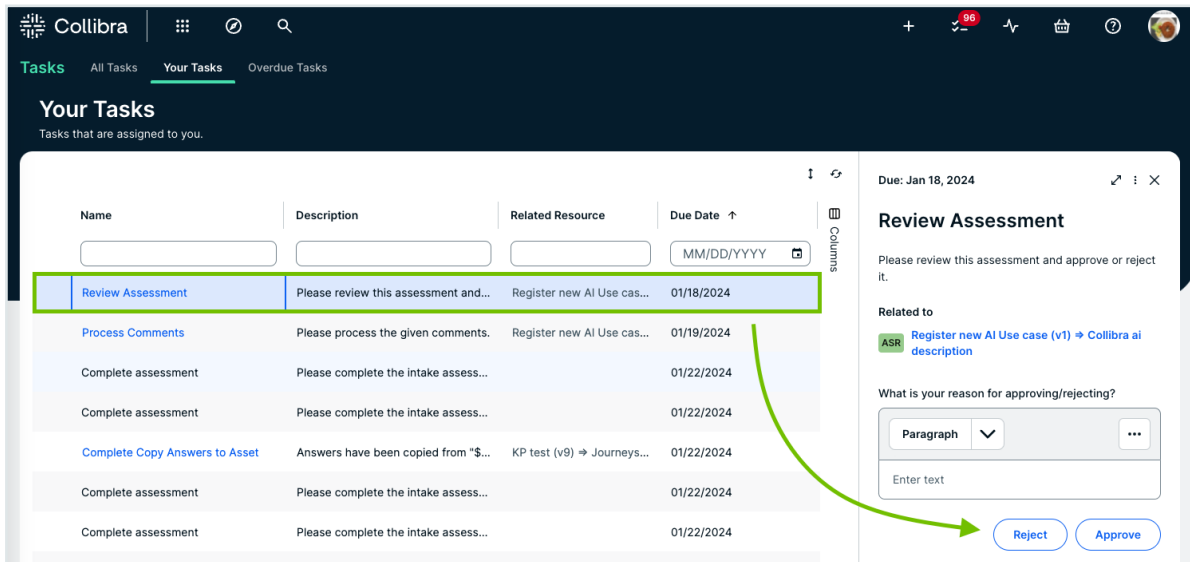
Completing the process: Approving the assessment

When the assessment is complete and the Owner clicks **Submit for Review**:

- An Assessment Review asset with the status Under Review is created in your Collibra environment (if the [Governance option](#) in the template that was used to conduct the assessment), in the domain of their choice.



- The **Assessments Approval workflow** is triggered, and the Business Steward for the domain receives a task to approve or reject the Assessment Review asset.



When the assessment is approved, the out-of-the-box Copy assessment answers to AI Use Case asset workflow is triggered.

- Certain responses that were provided in the assessment are automatically copied over to the AI Use Case asset page.

For a complete list of questions for which responses are copied to the AI Use Case asset page, and how they map to the characteristics on the asset page, go to [Copy assessment answers to AI Use Case asset workflow walk-through](#).

- An email notification is sent to the Owner of the AI Use Case asset, to notify them that responses were copied over.

AI Governance global roles and permissions (Beta)

The following tables describe the out-of-the-box AI Governance [global roles](#) and [global permissions](#).

Global role	Description
AI Legal Reviewer	<p>With this role, you have full access to the AI Governance features. Specifically, you can create, view, edit, and delete AI Use Case assets.</p> <p>A user with this role also accesses the Legal Reviewer landing page, which is designed specifically for the needs of Legal and Privacy experts.</p>

Global permission	Description
Product Rights > AI Governance	<p>The Read-only license is required for this permission. The permission gives you full access to the AI Governance features. Specifically, you can create, view, edit, and delete AI Use Case assets.</p> <p>The AI Legal Reviewer global role has this permission.</p>

Important

Before you start using AI Governance, you need to carry out one of the following configurations:

- Create a new global role (for example, AI Business User) and add the Product Rights > AI Governance global permission to the role; or
- Add the Product Rights > AI Governance global permission to an existing global role.

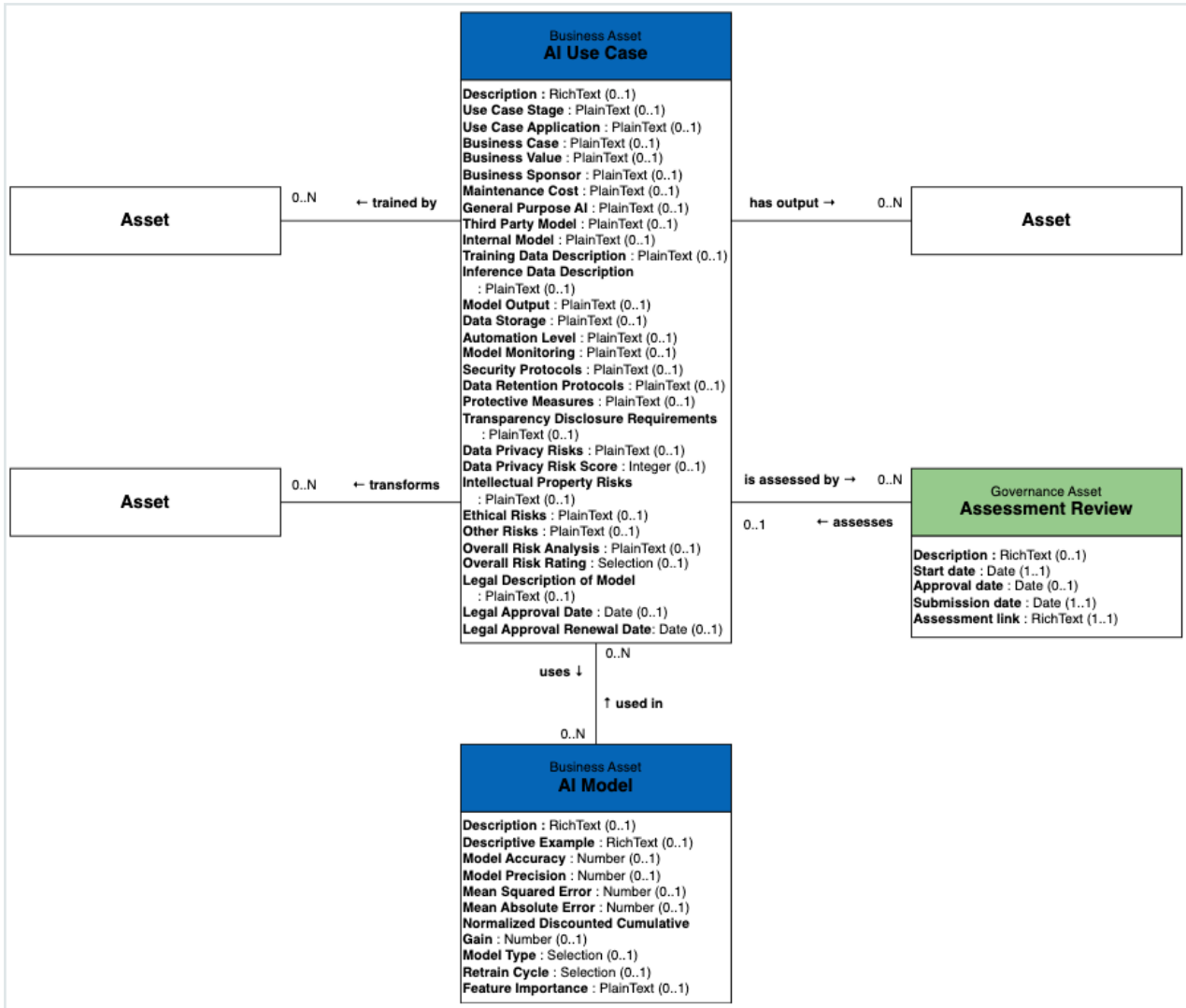
You can then assign that global role to users and user groups. All such users and user groups will have full access to the AI Governance features and access to the Business Steward landing page. Users and user groups to whom you assign the out-of-the-box AI Legal Reviewer global role will also have full access to the AI Governance features, but they will access the [Legal Reviewer landing page](#).

AI Governance operating model (Beta)

The AI Governance operating model includes the following AI Governance-specific asset types:

Asset type	Description	UUID
AI Model	AI Model is a statistical model that is trained on data-sets in order to make predictions on new data.	00000000-0000-0000-0000-0000000031402
AI Use Case	An AI Use Case is a specific application of artificial intelligence (AI) and AI Models trained on specific data in order to solve a business problem and deliver business value. Implementing AI Use Case may result in automating a task, improve decision-making or develop new products and services.	00000000-0000-0000-0000-0000000031401

The following image shows the relations between the AI Governance asset types and other relevant asset types.



Descriptions, attributes, and relation types

Click the relevant tab below to see descriptions, attributes, and relation types for each asset type.

AI Model

Description

A statistical model that is trained on datasets in order to make predictions on new data.

Relation types

Relation type	Head role / corole tail	UUID
used in AI Use Case	AI Use Case uses / used in AI Model	00000000-0000-0000-0000-000000007098

Attributes

Attribute	Description	UUID
Description	The description of the asset. This is typically a more verbose way to describe what the asset means.	00000000-0000-0000-0000-0000000003114
AI Model Accuracy	Model Accuracy refers to how well the model performs on a given task. Typically, this is defined by the proportion of correct predications made by the model. For example, if a model is used to classify emails as spam or not spam, and it classifies 90% of emails correctly, then the model accuracy is 90%.	00000000-0000-0000-0000-000000000328
AI Model Precision	Model Precision refers to how accurate positive model predictions are. Typically, this is defined as the proportion of predictions that are correct. For example, if a model is used to classify emails as spam, and it correctly classifies 95% of emails as spam, then the model has a precision of 0.95.	00000000-0000-0000-0000-000000000329
Mean Squared Error	Mean Squared Error (MSE) refers to a model quality metric that measures the quality of the model's predications.	00000000-0000-0000-0000-000000000330
Mean Absolute Error	Mean Absolute Error (MAE) refers to a model quality metric that evaluates the performance of regression models.	00000000-0000-0000-0000-000000000331

Attribute	Description	UUID
Normalized Discounted Cumulative Gain	Normalized discounted cumulative gain (NDCG) is a measure of ranking quality in machine learning.	00000000-0000-0000-0000-0000000000332
AI Model Type	Type of AI model. Values include: CatBoost Classifier, Random Forest Classifier, Gradient Boosting Classifier, Light Gradient Boosting Machine, Logistic Regression, Custom, Neural Network, and Generative AI.	00000000-0000-0000-0000-0000000000334
Retrain Cycle	The frequency with which the model is retrained. Values include: Daily, Weekly, Monthly, Quarterly, Yearly, and Other.	00000000-0000-0000-0000-0000000000335
Feature Importance	Feature Importance refers to how important a feature is to a machine learning model. It helps you to understand which features contribute the most to the model's predictions.	00000000-0000-0000-0000-0000000000333

AI Use Case

Description

An AI use case is a specific application of AI and AI Models, trained on specific data in order to solve a business problem and deliver business value. Implementing an AI use case may result in automating a task, improving decision-making, or developing new products and services.

Relation types

Relation type	Head role / corole tail	UUID
is assessed by Assessment Review	Asset is assessed by / assesses Assessment Review	00000000-0000-0000-0000-000000007097

Relation type	Head role / corole tail	UUID
uses AI Model	AI Use Case uses / used in AI Model	00000000-0000-0000-0000-000000007098
transforms Asset	AI Use Case transforms / is transformed Asset	00000000-0000-0000-0000-000000007099
trained by Asset	AI Use Case trained by / trains in Asset	00000000-0000-0000-0000-000000007100
has output Asset	AI Use Case has output / is output Asset	00000000-0000-0000-0000-000000007101

Attributes

Attribute	Description	UUID
Description	General description of the Use Case and its potential for the use of AI.	00000000-0000-0000-0000-000000000314
Use Case Stage	Indicates the status of your AI Use Case, specifically Ideation, Development, Monitoring, or Archived.	00000000-0000-0000-0000-000000000340
Use Case Application	Indicates that the AI use case will used by an external audience or internally by your organization.	00000000-0000-0000-0000-000000000301
Business Case	Refers to the business problem you want to solve with the AI use case. It focuses on describing a concrete business problem. For example, I'm a customer support manager and my team receives too many support tickets.	00000000-0000-0000-0000-000000000302
Business Value	Refers to how this AI use case can improve your organization. For example, reduce support tickets, bring in additional revenue, or mitigate risks.	00000000-0000-0000-0000-000000000303

Attribute	Description	UUID
Business Sponsor	Refers to the Business Owner or Executive Sponsor of the AI Use Case in your organization.	00000000-0000-0000-0000-0000000000336
Maintenance Cost	Refers to the Business Owner or Executive Sponsor of the AI use case within your organization.	00000000-0000-0000-0000-0000000000304
General Purpose AI	Refers to whether the model used in your AI use case is using a General Purpose AI (GPAI). Some regulatory frameworks may impose additional transparency and risk mitigation requirements for GPAI based systems, sometimes referred to as foundation models. For example, large language models (LLMs).	00000000-0000-0000-0000-0000000000305
Third-Party AI Model	Refers to the vendor of your AI model(s) and what kind of model you are using. For example, Google Vertex.	00000000-0000-0000-0000-0000000000306
Internal AI Model	Refers to the existing or upcoming internally built model(s) your AI use case may use.	00000000-0000-0000-0000-0000000000307
AI Model Training Data	The training or re-retraining data used to teach the AI model(s).	00000000-0000-0000-0000-0000000000308
AI Model Inference Data	An explanation of the input or inference data the AI model(s) uses to create output data. For example, an image classification model uses images as input data and a language model uses text as input data.	00000000-0000-0000-0000-0000000000309
AI Model Output	An explanation of the output data that the AI model (s) is expected to create. For example, classification labels, descriptions, or complex probability predictions.	00000000-0000-0000-0000-0000000000310
AI Model Data Storage	Refers to whether any data is stored, and if so, where and how the data is stored. For example, the prompts data is stored on the cloud.	

Attribute	Description	UUID
Human Oversight of AI Model	Refers to whether your AI model can be effectively overseen by humans. For example, are decisions based on the AI model's output entirely automated or does it require human oversight to review the output?	
AI Model Monitoring	Refers to how your organization will ensure the AI model is meeting accuracy and performance expectations.	00000000-0000-0000-0000-0000000000313
Legal Approval Date	Date your legal team approved or rejected the AI use case.	00000000-0000-0000-0000-0000000000314
Legal Approval Renewal Date	Date of the expected periodical review of the Use Case's approval.	00000000-0000-0000-0000-0000000000315
Legal Description of Model	Description of the AI model provided by your legal team. This may include any legal repercussions of processing the AI model within the context of the AI use case.	00000000-0000-0000-0000-0000000000316
Security Protocols	Any general security protocols that may result from the implementation of the AI use case.	00000000-0000-0000-0000-0000000000317
Data Retention Protocols	Any data retention standards already in place or projected to be implemented for the AI use case.	00000000-0000-0000-0000-0000000000318
Data Privacy Risks	Any data privacy risks that may result from processing the AI model within the context of this AI use case and either putting it on the market for external customer use or internal use? For example, is there the risk of a data breach or misuse of data?	00000000-0000-0000-0000-0000000000319
Intellectual Property Risks	Inherent Intellectual Property Risks resulting from processing AI Models within this use case and placing them on the market or putting into service for own use; examples include copyright or patent infringement.	00000000-0000-0000-0000-0000000000321

Attribute	Description	UUID
Ethical Risks	Any ethical risks that may result from processing the AI model within the context of this AI use case and either putting it on the market for external customer use or internal use? For example, is there the risk of a data breach or misuse of data?	00000000-0000-0000-0000-0000000000322
Other Risks	Other Risks resulting from processing AI Models within this use case and placing them on the market or putting into service for own use; examples may include safety and reliability, security, social risks.	00000000-0000-0000-0000-0000000000323
Overall Risk Analysis	Details and the result of any risk analysis performed on the AI use case.	00000000-0000-0000-0000-0000000000324
Overall Risk Rating	Risk level calculated based on pre-defined thresholds in the default Risk Assessment.	00000000-0000-0000-0000-0000000000325
Transparency Disclosure Requirements	Transparency Disclosure Requirements refers to identified requirements, if any, for AI use case transparency. For example, a Transparency Declaration that requires an organization to disclose the purpose of the AI model and any data used for training purposes.	00000000-0000-0000-0000-0000000000326
Protective Measures	Any additional required or recommended actions that have been identified based on regulations, industry standards or dedicated frameworks.	00000000-0000-0000-0000-0000000000327

Asset statuses

Status	Description
Ideation	The AI use case is just a concept, to be reviewed with regard to value and risks. It is not yet used in production. It can be considered a proof of concept.
Development	The AI use case is in, or is ready to enter, the development process.

Status	Description
Monitoring	The AI use case in production, is actively used and monitored with regard to business value and risks. AI models are monitored with regard to performance, reliability, and accuracy.
Archived	The AI use case is no longer in production. It is archived for documentation and audit purposes.

Tip For information on editing the status of an asset, go to [Edit an asset](#).

Open Collibra AI Governance (Beta)

AI Governance is a fee-based, cloud-only product. It is packaged with Collibra Data Intelligence Cloud but is disabled by default. Please contact your Customer Success Manager for complete information.

Note To use AI Governance, you must enable the [latest Collibra user interface](#).

Requirements and permissions

You have a [global role](#) with the **Product Rights > AI Governance** [global permission](#).

Important

Before you start using AI Governance, you need to carry out one of the following configurations:

- Create a new global role (for example, AI Business User) and add the Product Rights > AI Governance global permission to the role; or
- Add the Product Rights > AI Governance global permission to an existing global role.

You can then assign that global role to users and user groups. All such users and user groups will have full access to the AI Governance features and access to the Business Steward landing page. Users and user groups to whom you assign the out-of-the-box AI Legal Reviewer global role will also have full access to the AI Governance features, but they will access the [Legal Reviewer landing page](#).

Steps

On the main toolbar, click , and then click **AI Governance**.

- » If you have the AI Legal Reviewer global role, the Legal Reviewer landing page opens.
- » If you have any other global role that has the Product Rights > AI Governance global permission, the Business Steward landing page opens.

For complete information about the landing pages, go to [Tailored landing pages](#).

Tailored landing pages (Beta)

When you [open AI Governance](#), the landing page that opens is based on your global role in Collibra.

- If you have the AI Legal Reviewer global role, the Legal Reviewer landing page opens.
- If you have any other global role that has the Product Rights > AI Governance global permission, the Business Steward landing page opens.

Business Steward landing page

The Business Steward landing page allows you to view all existing AI use cases and register new use cases.

No.	Element	Description
1	Register AI Use Case button	Opens the Register AI Use Case dialog box.
2	Search AI Use Cases link	Opens the Search page. The asterisk (*) wildcard search is run with a filter applied for the AI Use Case asset type, meaning all existing AI Use Case assets are shown in the search results.

No.	Element	Description
3	Use cases	<p>The collection of all registered AI use cases, organized by status (Ideation, Development, Monitoring, or Archived), as specified by the Business Steward when registering the use case.</p> <p>Note Use cases with in the Archived status don't appear on the landing page. You can still find them, however, in the relevant domain. All AI Use Case assets are created in the out-of-the-box AI Governance domain.</p> <p>Tip For information on editing the status of an asset, go to Edit an asset.</p>

Legal Reviewer landing page

The Legal Reviewer landing page allows you to start assessments on new AI use cases, monitor existing and newly created use cases, and see which review tasks are awaiting action from you.

Collibra | [Icons]

Manage AI Risks with AI Governance

Explore your Collibra AI initiatives to monitor progress, align processes and structures, and effectively manage security and potential risks.

Get Started With Mitigating AI Risks

Ensure that AI systems are developed and used responsibly, transparently, and with the necessary accountability. Evaluate legal, ethical, bias, copyright, privacy, and social concerns so that risks are mitigated and the use of AI benefits society while minimizing potential risks and harm.

[Conduct AI Use Case Assessment](#) **1**

Are You Looking For a Specific Use Case?

Are you looking for a specific use case? Search by name or keyword and use filters to find a specific use case or AI model.

[Search AI Use Cases](#) **2**

Recently Created **3**

Created 4 minutes ago

HR candidate screener

Automate the screening of new job candidates based on a defined set of criteria.

Created about 1 hour ago

Description Generator

Generate description suggestions for all new elements that include complex calculations...

To Review **4**

- Register new AI Use case (v1) → Frequency calculator
Assessment Review →
- Register new AI Use case (v1) → A1rht66 modulator
Assessment Review →
- Register new AI Use case (v1) → New seating arrangements for A1223s
Assessment Review →
- Register new AI Use case (v1) → Moon landing W23e4r
Assessment Review →
- Register new AI Use case (v1) → Definition editor
Assessment Review →

High Risk (3) **5**

Created about 1 month ago

Frequency modulator

Overall Risk Rating: **High**

Automate the repetition calculations that we deploy in all new X1rt566 units.

Requirements include the following:

- ...
- ...
- ...

Created about 1 month ago

Temperature Valve Adjust

Overall Risk Rating: **High**

The temperature valve adjust requires near constant monitoring, evaluation and adjustments. This directly affects the success rate of all A12d4ff models.

Requirements include the following:

- ...
- ...
- ...

Created about 1 month ago

System Override Adjust

Overall Risk Rating: **High**

The System Override adjustments should be automated, to relieve operators from constantly monitorin and consulting mapping tables.

No.	Element	Description
1	Conduct AI Use Case Assessment button	<p>Starts the Register New AI Use Case assessment. You can start an assessment before or after an AI use case is registered.</p> <p>The out-of-the-box Register New AI Use Case assessment template, which you can find in the Template Gallery, is the default template for assessing AI use cases.</p> <p>For more information, go to Conduct an assessment of an AI Use Case asset.</p>
2	Search AI Use Cases link	<p>Opens the Search page. The asterisk (*) wildcard search is run with a filter applied for the AI Use Case asset type, meaning all existing AI Use Case assets are shown in the search results.</p>
3	Recently Created	<p>Shows the three most recently registered AI use cases.</p>
4	To Review	<p>Shows the assessment review tasks that you've been assigned and which require action from you. The oldest tasks are shown, up to a maximum of five.</p> <p>Click a review item to open the respective Assessment Review asset page.</p> <div style="border: 1px solid #ccc; padding: 10px; margin-top: 10px;"> <p>Note Tasks related to Assessment Review assets that have the status New, Accepted, Rejected, or Obsolete do not appear in this list.</p> </div>
5	Current Risk Monitoring section	<p>Shows all AI use cases that have been tagged as High Risk.</p> <ul style="list-style-type: none"> • Low complexity: Low complexity risks are those that can typically be described by a single stakeholder and are more easily automated. Example: Is your data open source? • Intermediate complexity: Intermediate complexity risks can sometimes be described by a single stakeholder, but oftentimes require an open-ended response. Example: How will the model be using the data? • High complexity: High complexity risks can rarely be described by a single stakeholder, typically require an open-ended response, and are frequently subjective in nature. Example: How have you minimized the number of data subjects you're using in your model?

Working with AI use case assets (Beta)

Each AI Use Case asset is intended to be a single source of truth. After a use case is registered, the use case Owner leads a collaborative effort to complete a series of intake questionnaires designed to help you determine the value of your use case and all associated risks.

Register an AI use case (Beta)

To register a new AI use case, you need only provide a name and description, describe the audience, select a status, and assign an owner. That's it. After that, the Owner that you specify is assigned a task, prompting them to conduct an assessment of the use case. The assessment is designed to help you determine the value of your use case and identify any associated risks.

Requirements and permissions

- You have any global role – except the AI Legal Reviewer role – that has the **Product Rights > AI Governance** global permission.

Important To register a new AI use case, you need access the Business Steward landing page. If you have the AI Legal Reviewer global role, you can't access the Business Steward landing page.

- You have a [global role](#) that has the Business Semantics Glossary [global permission](#), for example Glossary.
- You have a [resource role](#) with the Asset > Add [resource permission](#).

Tip We recommend assigning the Community Manager resource role for the out-of-the-box AI Governance domain, to anybody who will be registering and editing AI use cases. The Community Manager resource role comes with the resource permissions you need to add and work with assets, attributes, responsibilities, comments, statuses, and more.

Steps

1. On the AI Governance landing page, click **Register AI Use Case**.
 - » The **Register AI Use Case** dialog box appears.
2. Enter the required information.

Field	Description
Name	The name of the AI Use Case asset.
Description	The purpose of your AI use case proposal and its potential use of AI.
Target Audience	The type of user that is likely to interact with your AI use case, for example Internal or Customer Facing.
Use Case Stage	<p>The current status of your AI use case, for example:</p> <ul style="list-style-type: none"> ◦ Ideation: The AI use case is just a concept, to be reviewed with regard to value and risks. It is not yet used in production. It can be considered a proof of concept. ◦ Development: The AI use case is in, or is ready to enter, the development process. ◦ Monitoring: The AI use case in production, is actively used and monitored with regard to business value and risks. AI models are monitored with regard to performance, reliability, and accuracy.
Owner	<p>The Collibra user or user group who will act as the owner of the use case. The user or user group you select:</p> <ul style="list-style-type: none"> ◦ Is assigned the Owner resource role for the AI Use Case asset. ◦ Is responsible for coordinating the completion of the Register new AI Use Case assessment.

3. » Click **Register**.
 - » A new AI Use Case asset is created in the out-of-the-box AI Governance domain, and shown on both the Business Steward and the Legal Reviewer [landing pages](#).
 - » The Register AI Use Case workflow is triggered. The Owner of the AI Use Case asset is notified and prompted to start an assessment.

What's next?

- [Edit](#) the AI Use Case asset, as necessary.

Important Be mindful of the edits you make before the Register new AI Use Case assessment is completed and approved. When the assessment is approved, the Copy assessment answers to AI Use Case asset workflow is triggered. This workflow automatically copies many of the responses that were provided in the assessment to the AI Use Case asset page. If you edit the attributes of an AI Use Case asset before the assessment is approved, the values will be overwritten by the workflow, when the assessment is approved. For a complete list of questions for which responses are copied to the AI Use Case asset page, and how they map to the characteristics on the asset page, go to [Copy assessment answers to AI Use Case asset workflow walk-through](#).

- [Conduct](#) an assessment of the new AI Use Case asset.

Edit the characteristics of an AI use case (Beta)

You can open an AI Use Case asset page and edit or delete existing details, and add new details.

Important

Be mindful of the edits you make before the Register new AI Use Case assessment is completed and approved. When the assessment is approved, the Copy assessment answers to AI Use Case asset workflow is triggered. This workflow automatically copies many of the responses that were provided in the assessment to the AI Use Case asset page. If you edit the attributes of an AI Use Case asset before the assessment is approved, the values will be overwritten by the workflow, when the assessment is approved.

For a complete list of questions for which responses are copied to the AI Use Case asset page, and how they map to the characteristics on the asset page, go to [Copy assessment answers to AI Use Case asset workflow walk-through](#).

This topic refers to editing the attributes and relations of the AI Use Case asset. For information on editing the name of the asset and its status, go to [Edit an asset](#).

Requirements and permissions

- You have a [global role](#) with the **Product Rights > AI Governance** [global permission](#).
- You have a [global role](#) that has the Business Semantics Glossary [global permission](#), for example Glossary.
- You have a [resource role](#) with the [resource permissions](#) to at least add, remove, and update attributes.

Tip We recommend assigning the Community Manager resource role for the out-of-the-box AI Governance domain, to anybody who will be registering and editing AI use cases. The Community Manager resource role comes with the resource permissions you need to add and work with assets, attributes, responsibilities, comments, statuses, and more.

Steps

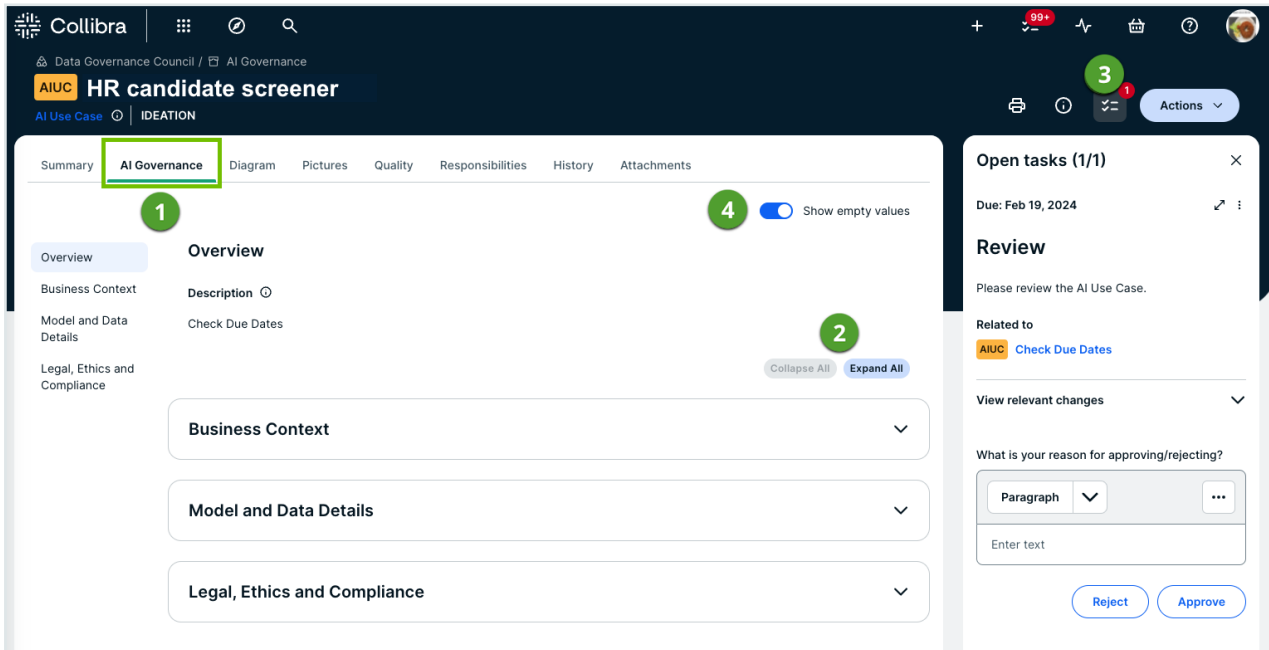
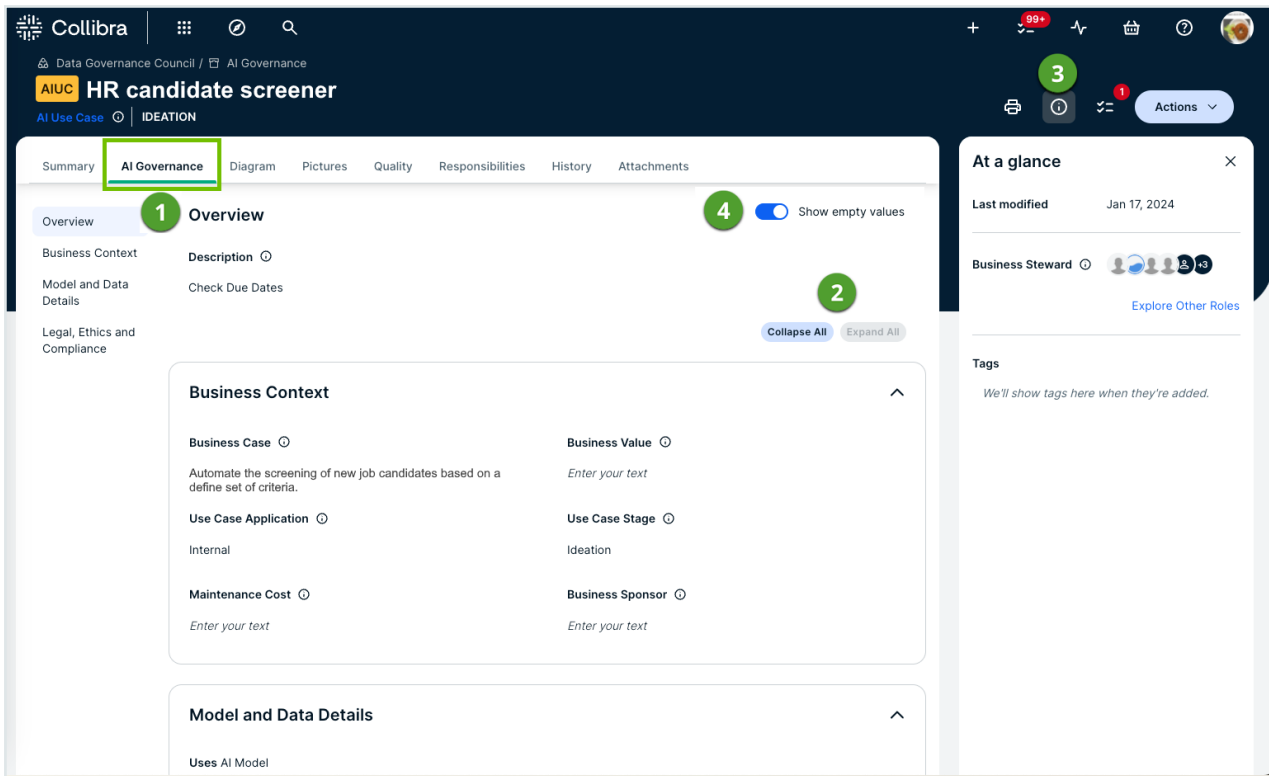
1. Go to the Business Steward or Legal Reviewer [landing page](#).
2. Click on the AI Use Case asset that you want to edit.
3. Do one of the following:
 - Click on an existing value, to edit it.
 - Click on an empty attribute type or relation type, to add a value.

Tip If the **Show empty values** option is switched off, all attribute types and relation types that don't have a value are hidden. To show empty attribute types and relation types and start adding values, switch on the **Show empty values** option.

» When you click outside of the active field, the content is automatically saved.

AI Use Case asset page (Beta)

The [AI Use Case asset page](#) is a working record where you and your colleagues can collaborate as the use case evolves, to capture critical details as they become known. The asset page is intended to be a single source of truth, where stakeholders can quickly find the business value of the project and all associated risks.



The screenshot displays the Collibra user interface for a document titled "Check Due Date" under the "AIUC" (AI Use Case) and "IDEATION" categories. The document is currently viewed in the "Responsibilities" tab, which is highlighted with a green box and a circled "1".

The main content area is divided into two primary sections:

- Business Steward:** This section lists inherited roles: Andre DuBuque, Jason Ledner, and Leticia West. A green box highlights the "Community Manager" role, which is also inherited and includes the following responsibilities: Data Custodians, Admin Istrator, and IpsitaBusinessUser Mishra. A green arrow points from the "Community Manager" role in the Business Steward section to this detailed view.
- Issue Manager:** This section lists inherited roles, including Admin Istrator. A green box highlights the "Owner" role, which is assigned to Julie Phillips. A green arrow points from the "Owner" role in the Issue Manager section to this detailed view.

The right-hand sidebar, titled "At a glance", provides summary information: "Last modified" on Jan 17, 2024, and "Business Steward" with a list of users and an "Add" button. Below this, there is a "Tags" section with a note: "We'll show tags here when they're added."

No.	Element	Description
1	AI Governance tab	<p>Shows all of the use case details, as provided during the assessment. The majority of the details in the body of the asset page are copied over from the associated assessment, by the Copy assessment answers to AI Use Case asset workflow, when the assessment is approved.</p> <p>You can edit, add and delete details.</p> <div style="border: 1px solid #ccc; padding: 10px; margin: 10px 0;"> <p>Important</p> <p>Be mindful of the edits you make before the Register new AI Use Case assessment is completed and approved. When the assessment is approved, the Copy assessment answers to AI Use Case asset workflow is triggered. This workflow automatically copies many of the responses that were provided in the assessment to the AI Use Case asset page. If you edit the attributes of an AI Use Case asset before the assessment is approved, the values will be overwritten by the workflow, when the assessment is approved.</p> <p>For a complete list of questions for which responses are copied to the AI Use Case asset page, and how they map to the characteristics on the asset page, go to Copy assessment answers to AI Use Case asset workflow walk-through.</p> </div> <div style="border: 1px solid #ccc; padding: 10px; margin: 10px 0;"> <p>Note If you click on an AI use case from either of the AI Governance the landing pages, the asset page opens to the AI Governance tab. If you open an AI Use Case asset via the asset page URL or via search results, the asset page opens the Summary tab.</p> </div>
2	Collapse All/Expand All buttons	<p>The body of the asset page is organized into three sections:</p> <ul style="list-style-type: none"> • Business Context • Model and Data Details • Legal, Ethics and Compliance <p>You can expand or collapse these sections, to suit your needs.</p>
1	Responsibilities tab	<p>Shows the Owner that was selected when registering the use case and all inherited responsibilities.</p>

No.	Element	Description
3	At a glance sidebar	Shows information <ul style="list-style-type: none"> • Last Modified: The date on which the asset was last edited. If the asset was never edited, the creation date is shown. • Business Steward: This Business Steward for the asset. To view the other responsibilities for the asset, click Explore Other Roles. • Tags: Any tags that have been applied to the asset. To add or remove tags, click in the field below the header, and then click an existing tag or enter a new one.
3	Task sidebar	Shows any tasks related to the use case that are assigned to you.
4	Show empty values toggle	If the Show empty values option is switched off, all attribute types and relation types that don't have a value are hidden. If you want to add values in empty characteristics fields, ensure that the Show empty values option is switched on, and then click in an empty field to enter a value.

Working with AI use case assessments (Beta)

When an AI use case is registered, the [Register AI Use Case workflow](#) is triggered. The Owner of the AI Use Case asset is notified and prompted to start an assessment.

The Owner is responsible for driving the assessment, but collaboration from Analytics, Data Offices, Legal and Privacy teams, and so forth, is essential to ensuring that all critical details and associated risks are identified and recorded. The out-of-the-box Register New AI Use Case assessment in the [Template Gallery](#) aims to elicit the following considerations:

- Business context: details about how your AI use case impacts and improves the business.
- AI Model(s) in use: details about the AI model(s) that will be used in your AI use case.
- Data associated with the AI use case: details on the data you will use and collect with your AI use case.
- Trademark name: potential names you would like your Legal team to submit for trademark review.

Tip AI Governance uses the Collibra Assessments app and features, to enable stakeholders to add essential details to your AI use cases and document associated risks. This section of the documentation addresses only the AI Governance-specific aspects of the Assessments app. For complete information on working with assessments, including assessment templates and the Assessments Approval workflow, go to [Collibra Assessments](#).

Conduct an assessment of an AI Use Case asset (Beta)

When an AI use case is registered, the [Register AI Use Case workflow](#) is triggered. The Owner of the AI Use Case asset is notified and prompted to start an assessment. The out-of-the-box Register New AI Use Case assessment template, which you can find in the [Template Gallery](#), is the default template for assessing AI use cases.

Typically, you [register](#) an asset and then conduct the assessment. However, you can also conduct an assessment before registering an AI Use Case asset, which can be useful in guiding the onboarding process. Both approaches are addressed in this topic.

You can start an assessment via the Legal Reviewer landing page, or via the [Assessments app landing page](#). Both approaches are addressed in this topic.

Tip AI Governance uses the Collibra Assessments app and features. For complete information on working with Collibra Assessments, go to [Collibra Assessments](#).

Requirements and permissions

- To access the [AI Legal Reviewer landing page](#), you need the AI Legal Reviewer global role.
- Any user that has a global role with the **Product Rights >AI Governance** global permission can start an assessment from the [Assessments app landing page](#).
- To submit an assessment for approval:
 - You need a [global role](#) that has the **Policy Manager global permission**, because an Assessment Review asset is created when you submit an assessment.

- The **Business Steward** role must be [assigned](#) to the domain that you will select when submitting the assessment.

Assess an AI use case

Via the Legal Reviewer landing page

Note To access the [AI Legal Reviewer landing page](#), you need the AI Legal Reviewer global role.

1. [Open](#) the Collibra AI Governance app.
 - » The AI Legal Reviewer landing page opens.
2. Click **Conduct AI Use Case Assessment**.
 - » The **Conduct AI Use Case Assessment** dialog box appears.
3. Does the asset that you want to assess already exist in Collibra?
 - If the asset already exists:
 - i. Click **Yes**.
 - ii. In the **Asset** drop-down list, find and select the AI Use Case asset that you want to assess.

Note When creating assessment templates, you can specify for which assets types the assessment template can be used. If the template you choose has not been configured for the type of asset you are assessing, the asset will not appear in the Asset drop-down list.
 - If the asset does not yet exist:
 - i. Click **No**.
 - ii. In the **Assessment Name** field, enter a name for the assessment you are about to conduct.
4. Click **Confirm**.
 - » A new assessment is created.
5. Respond to the assessment questions.

6. On the **Properties** tab, set the [assessment permissions](#):
7. Do one of the following:

Via the Assessments app landing page

1. Go to the [Assessments landing page](#).
2. In the **Conduct an Assessment** side pane, select the assessment template that you want to use.

Important We strongly recommend that you select the out-of-the-box Register New AI Use Case template. If you select any other template, the [Copy assessment answers to AI Use Case asset](#) won't run and the assessment responses won't be copied over to the AI Use Case asset page.

3. Does the asset that you want to assess already exist in Collibra?
 - If the asset already exists:
 - i. Click **Yes**.
 - ii. In the **Asset** drop-down list, find and select the AI Use Case asset that you want to assess.

Note When creating assessment templates, you can specify for which assets types the assessment template can be used. If the template you choose has not been configured for the type of asset you are assessing, the asset will not appear in the Asset drop-down list.

- If the asset does not yet exist:
 - i. Click **No**.
 - ii. In the **Assessment Name** field, enter a name for the assessment you are about to conduct.
4. Click **Conduct Assessment**.
 - » A new assessment is created.
5. Respond to the assessment questions.
6. On the **Properties** tab, set the [assessment permissions](#):
7. Do one of the following:

What's next?

- [Edit the assessment.](#)
- [Complete or submit the assessment.](#)

The Assessments Approval workflow notifies the Business Steward (by default) that an Assessment Review asset is ready for review and prompts them to [approve or reject the asset](#). For complete information about the workflow, go to [The Assessments Approval workflow](#).

The Register AI Use Case workflow

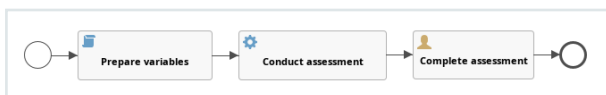
This workflow notifies the Owner of the AI Use Case that a new use case has been registered and prompts them to lead an assessment of the use case.

Warning For this workflow to work, an Owner must be [assigned](#) to the AI Use Case asset.

Tip If you are creating and deploying your own workflows, you can call the Assessments API within your workflows to start or retrieve an assessment. For more information, see [Start or retrieve an assessment via workflows](#).

Register AI Use Case workflow description

Diagram



Start the workflow

When you [register](#) an AI use case:

- An new **assessment**, which uses the out-of-the-box Register New AI Use Case **template**, is started.
- The Owner of the AI Use Case asset receives an email notification and is prompted to **conduct** the assessment of the use case.

Relevant resource roles

The following table shows the relevant resource roles and the workflow tasks they can carry out.

Resource role	Task	Required
Owner	<ul style="list-style-type: none"> • Start the Register New AI Use Case assessment 	Yes

Workflow initiator

The workflow starts when you register an AI use case.

Status of the Register New AI Use Case assessment

Condition	Status
Any user registers an AI use case.	Draft

Conduct the assessment

The Owner of the AI Use Case asset, as specified when registering the use case, conducts the assessment of the use case. The email notification sent to the Owner contains a link to the assessment.

The assessment should be a collaborative effort. Every stakeholder involved in the project should be called on to provide the business and technical information needed to complete the evaluation, including:

- The business case.
- The business value description.

- Information about the training and inference datasets, their categories, sources, quality and lineage.
- The AI models at the center of the use cases.
- Legal and Privacy teams' insights on associated risks.
- Links to the assessment, or assessments, conducted with respect to the use case.
- The stakeholder roles and responsibilities associated with the use case, for example Legal Steward, Privacy Steward and Data Protection Officers.
- Any inference and training data.

Upon submitting the assessment

When a user submits the assessment for review, the [Assessments Approval workflow](#) starts:

- In your Collibra environment, an Assessment Review asset with the status **Under Review** is created in the domain that you selected when submitting the assessment.
- The Assessments Approval workflow is triggered. This workflow notifies the Business Steward (by default) that an assessment is ready for review.

Important The Assessments Approval workflow is not relevant and not triggered if the [Governance option](#) is cleared in the template that was used for your assessment.

Register AI Use Case workflow configuration

Access the workflow configuration via  **Settings** → **Workflows** → **Definitions** → **Register AI Use Case**.

Description [Edit](#)

Intake workflow when registering an AI Use Case.

Start Label [Edit](#)

Propose AI Use Case

Applies To [Add Rules](#) [Edit](#)

Global

Asset type	With status	In community/domain	Actions
<p>No rules available</p> <p>Add restriction rules to see them here.</p>			
0 Rules			

Start Events [Edit](#)

There are no events attached to this workflow.

Roles [Edit](#)

Start workflow
There are no roles selected.

Stop workflow
There are no roles selected.

Reassign tasks
There are no roles selected.

Variables [Edit](#)

These variables are accessible in the workflow.

Name	Description	Value
formCompleteAssessmentDueDate	The due date expressed in duration for task 'formCompleteAsses...	B1M
formCompleteAssessmentTaskNotificat...	Send notification emails for task 'formCompleteAssessment'.	true
formCompleteAssessmentEscalationD...	The escalation time duration for task 'formCompleteAssessment'.	B1M
formCompleteAssessmentEscalationTy...	The escalation type for task 'formCompleteAssessment'.	mail

4 Variables

Other

- Any signed in user can start the workflow.
Any signed in user can start a workflow, independent of the role that user has.
- Perform candidate user check on workflow start.
Workflow will fail to initialize if it contains a task without any candidate user.
- This workflow can only run once at the same time on a specific resource.
 - Lock resource
This workflow cannot run with other workflows on the same resource simultaneously.
 - Show in global create.

Applies to

This is a global workflow, meaning it is not restricted to any particular resource.

Configuration variables

You can edit the configuration variables directly from the workflow definition page by clicking in the upper-right corner of the variables table.

Variable	Description	Default value
formCompleteAssessmentDueDate	The due date expressed in duration for task 'formCompleteAssessment'.	B1M
formCompleteAssessmentTaskNotificationEnabled	Send notification emails for task 'formCompleteAssessment'.	true
formCompleteAssessmentEscalationDuration	The escalation time duration for task 'formCompleteAssessment'.	B1M

Variable	Description	Default value
formCompleteAssessmentEscalationType	The escalation type for task 'formCompleteAssessment'.	mail

Start label

The start label is the name of the workflow when it is visible as a button on a resource page or in the drop-down list when you add it as a button on a dashboard. You can find the **Start Label** section in the upper-right corner of the workflow definition page.

Default value: Register AI Use Case

Click **Edit** to edit the label.

Start Event

A start event is an event that triggers the workflow, for example starting the workflow when an asset is created.

By default, there are no start events attached to this workflow.

Roles

The roles define the permissions to manage the workflow. For example, if a certain tasks must be urgently executed but the responsible person is on sick leave, a user with the defined role can reassign that task to somebody else.

Action	Roles
Start workflow ¹	There are no roles selected.
Stop workflow ²	There are no roles selected.
Reassign tasks ³	There are no roles selected.

¹The button with the start label is available to users with these roles.

²The option to cancel the workflow is available to users with these roles.

³The option to reassign the task is available to users with these roles.

Other

The settings in this section define global restrictions that apply to the workflow such as:

- Accessibility to guest or logged in users.
- Checking that the roles required by the workflow are not empty.
- Preventing the same workflow or other workflows from running on the same resource.
- Making the workflow available to be added to a dashboard.

Setting	Enabled
Any signed in user can start the workflow.	Yes
Any signed in user can start a workflow, independent of the role that user has.	
Perform candidate user check on workflow start.	No
Workflow will fail to initialize if it contains a task without any candidate user.	
This workflow can only run once at the same time on a specific resource.	Yes
Lock resource.	No
This workflow cannot run with other workflows on the same resource simultaneously.	
Show in global create.	No

The Copy assessment answers to AI Use Case asset workflow

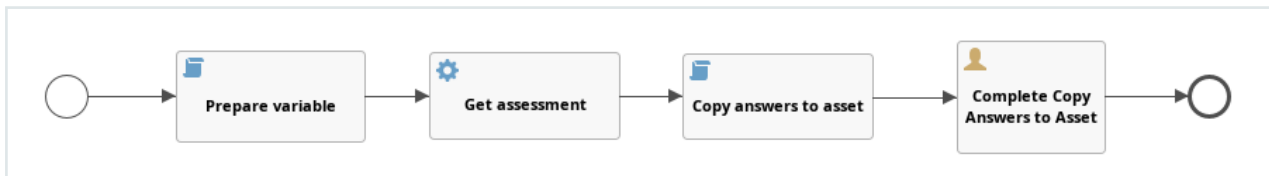
This workflow automatically copies responses that were provided in an assessment to the asset page of the AI Use Case asset that was the subject of the assessment.

Important This workflow will only start if the out-of-the-box Register New AI Use Case template was used for the assessment.

Tip If you are creating and deploying your own workflows, you can call the Assessments API within your workflows to start or retrieve an assessment. For more information, see [Start or retrieve an assessment via workflows](#).

Copy assessment answers to AI Use Case asset workflow walk-through

Diagram



Start the workflow

The workflow starts when the status of an Assessment Review asset, associated with the assessment of an AI Use Case asset, becomes approved.

Important This workflow will only start if the out-of-the-box Register New AI Use Case template was used for the assessment.

Results of the workflow

- Certain responses that were provided in the assessment are copied to the [AI Use Case asset page](#).
- A task is created for the Owner of the AI Use Case asset, to notify them that the responses have been copied over to the asset page.

Copied responses

The following table shows from which questions from the assessment responses are copied, and how they map to the characteristics on the AI Use Case asset page.

Question name	Question ID	How the response is mapped to the AI Use Case asset page
AI Use Case Name	UseCase_Name	Becomes the display name of the asset.
AI Use case description	UseCase_Description	Copied to the Description attribute.
Is this AI use case going to be used internally only, or rather become a customer-facing product, feature or tool?	UseCase_publicfacing	Copied to the Use Case Marketable attribute.
What is the stage of the AI use case development?	UseCase_Status	Copied to the Use Case Lifecycle description attribute.
Explain Business Case	Business_Case	Copied to the Business Case attribute.
Define Business Value	Business_Value	Copied to the Business Value attribute.
Indicate Business Owner or Executive Sponsor of the AI Use Case in the organization	Business_Sponsor	Copied to the Business Sponsor attribute.
Please indicate overall expected cost of running the use case over selected period of time	Business_Cost	Copied to the Cost of Maintenance attribute.
Will this feature need single or multi-tenant models? Why?	Cost_multitenant	Nothing is copied to the AI Use Case asset page. There are no matching attributes.
How many customers do you estimate will be exposed to this feature?	Cost_customers	Nothing is copied to the AI Use Case asset page. There are no matching attributes.
If the use case will be based on the GenAI model, please provide an example prompt that will be sent to the model	Cost_prompt	Nothing is copied to the AI Use Case asset page. There are no matching attributes.
How many monthly prompts on average do you expected to be made per customer?	Cost_scale	Nothing is copied to the AI Use Case asset page. There are no matching attributes.

Question name	Question ID	How the response is mapped to the AI Use Case asset page
Will the fine-tuned model be needed?	Cost_finetune	Nothing is copied to the AI Use Case asset page. There are no matching attributes.
AI Model in place	Model_Selection	The relation "AI Use Case uses / used in AI Model" is added between the AI Model asset selected in the asset picker and the AI Use Case.
Is the model in use considered a General Purpose AI (GPAI)?	Model_GeneralPurpose	Copied to the General Purpose AI attribute.
Will a Third-Party model be leveraged or is the AI/ML Team building this model internally?	Model_3rd_Party	Nothing is copied to the AI Use Case asset page. There are no matching attributes.
If Third-Party AI Model will be used, please specify (e.g. Azure Open AI, AWS Bedrock, Google Vertex, etc.)	Model_3rdParty_desc	Copied to the Third-Party Model Description attribute.
If this is a model being built internally, provide more information about the model	Model_internal_desc	Copied to the Internal Model Description attribute.
What training data, if known, is used to train the AI Model?	Data_training	Copied to the Model Training Data attribute.
What kind of input (inference data) is provided to the AI Model?	Data_inference	Copied to the Model Inference Data attribute.
What kind of output does the AI Model provide?	Data_output	Copied to the Model Output attribute.
Inference Data related questions (3x)	<ul style="list-style-type: none"> • Inference_DS • Inference_Tables • Inference_TA 	A relation "AI Use Case transforms / is transformed Asset" (UUID 00000000-0000-0000-0000-000000007099) is added between the asset selected in the asset picker and the AI Use Case.

Question name	Question ID	How the response is mapped to the AI Use Case asset page
Training Data related questions (3x)	<ul style="list-style-type: none"> • Training_DS • Training_ Tables • Training_TA 	A relation "AI Use Case is trained by / trains Asset" (UUID 00000000-0000-0000-0000-000000007100) is added between the asset selected in the asset picker and the AI Use Case.
Output Data related questions (3x)	<ul style="list-style-type: none"> • Output_DS • Output_ Tables • Output_TA 	A relation "AI Use Case has output / is output Asset" is added between the asset selected in the asset picker and the AI Use Case. create relation "has output" to Asset (relation type ID 00000000-0000-0000-0000-000000007101)
Where will the training, input, and output data be processed and stored?	Data_storage	Copied to the Model Data Storage attribute.
How do you intend to monitor the performance of the model and ensure that it is meeting accuracy and performance expectations?	Model_Monitoring	Copied to the Model Monitoring attribute.
Are decisions gonna be based solely on the automated output, or is there human oversight possible or planned?	Data_automation	Copied to the Model Level of Automation/ Human Oversight attribute.

Copy assessment answers to AI Use Case asset workflow configuration

Access the workflow configuration via  **Settings** → **Workflows** → **Definitions** → **Copy assessment answers to AI Use Case asset**.

Description Edit

Intake workflow when copying answers to an AI Use Case.

Applies To Add Rules Edit

Asset

Asset type ↑	With status	In community/domain	Actions
Assessment Review	Approved		🗑️

1 Rule

Variables Edit

These variables are accessible in the workflow.

Name	Description	Value
formCompleteCopyAnswersDueDate	The due date expressed in duration for task 'formCompleteCopyA...	B1M
formCompleteCopyAnswersTaskNotific...	Send notification emails for task 'formCompleteCopyAnswers'.	true
formCompleteCopyAnswersEscalation...	The escalation time duration for task 'formCompleteCopyAnswers'.	B1M
formCompleteCopyAnswersEscalationT...	The escalation type for task 'formCompleteCopyAnswers'.	mail

4 Variables

Start Label Edit

Copy assessment answers to AI Use Case asset

Start Events Edit

Asset Status Changed
An asset has been updated.

Roles Edit

Start workflow
There are no roles selected.

Stop workflow
There are no roles selected.

Reassign tasks
There are no roles selected.

Other

- Any signed in user can start the workflow.
Any signed in user can start a workflow, independent of the role that user has.
- Perform candidate user check on workflow start.
Workflow will fail to initialize if it contains a task without any candidate user.
- This workflow can only run once at the same time on a specific resource.
 - Lock resource
This workflow cannot run with other workflows on the same resource simultaneously.
 - Show in global create.

Applies to

This workflow applies to the following asset types:

Asset type	With status	Remark
Assessment Review	Approved	None

Note When you select a parent asset type, it includes all of its children. For example, if you select **Business Asset**, the workflow also applies to **Business Term** because it is a type of **Business Asset**.

Configuration variables

You can edit the configuration variables directly from the workflow definition page by clicking in the upper-right corner of the variables table.

Variable	Description	Default value
formCompleteCopyAnswersDueDate	The due date expressed in duration for task 'formCompleteCopyAnswers'.	B1M
formCompleteCopyAnswersTaskNotificationEnabled	Send notification emails for task 'formCompleteCopyAnswers'.	true
formCompleteCopyAnswersEscalationDuration	The escalation time duration for task 'formCompleteCopyAnswers'.	B1m
formCompleteCopyAnswersEscalationType	The escalation type for task 'formCompleteCopyAnswers'.	mail

Start label

The start label is the name of the workflow when it is visible as a button on a resource page or in the drop-down list when you add it as a button on a dashboard. You can find the **Start Label** section in the upper-right corner of the workflow definition page.

Default value: Copy assessment answers to AI Use Case asset

Click **Edit** to edit the label.

Start Event

A start event is an event that triggers the workflow, for example starting the workflow when an asset is created.

This workflow is configured to start when the status of an Assessment Review asset becomes Approved.

Important The Assessment Review asset must be associated with an AI Use Case asset. In other words, the out-of-the-box Register New AI Use Case template must have been used for the assessment.

Roles

The roles define the permissions to manage the workflow. For example, if a certain tasks must be urgently executed but the responsible person is on sick leave, a user with the defined role can reassign that task to somebody else.

Action	Roles
Start workflow ¹	There are no roles selected.
Stop workflow ²	There are no roles selected.
Reassign tasks ³	There are no roles selected.

Other

The settings in this section define global restrictions that apply to the workflow such as:

- Accessibility to guest or logged in users.
- Checking that the roles required by the workflow are not empty.
- Preventing the same workflow or other workflows from running on the same resource.
- Making the workflow available to be added to a dashboard.

Setting	Enabled
Any signed in user can start the workflow.	Yes
Any signed in user can start a workflow, independent of the role that user has.	
Perform candidate user check on workflow start.	Yes
Workflow will fail to initialize if it contains a task without any candidate user.	
This workflow can only run once at the same time on a specific resource.	Yes
Lock resource.	No
Show in global create.	No

¹The button with the start label is available to users with these roles.

²The option to cancel the workflow is available to users with these roles.

³The option to reassign the task is available to users with these roles.