

Adding AI-Generated Regulatory Summarization to a Form

Last Modified on 11/06/2025 4:10 pm EST

Overview

AI-Generated Regulatory Summarization uses AI/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.

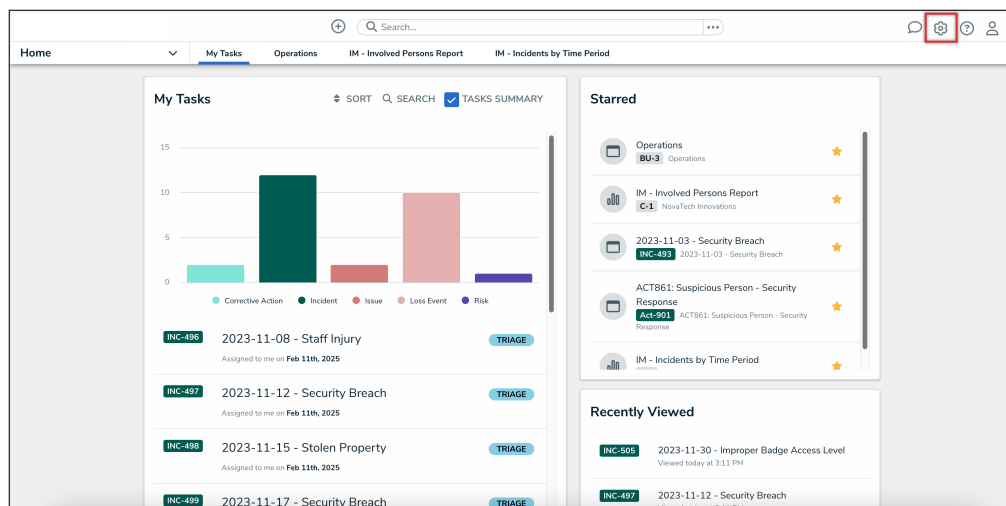
Related Information/Setup

For more information on self-enabling this feature on your Org, please refer to the [Enabling the AI-Generated Regulatory Summarization Feature on an Org](#) article.

For more information on using configurable forms in Resolver, please refer to the [Configurable Forms](#) section.

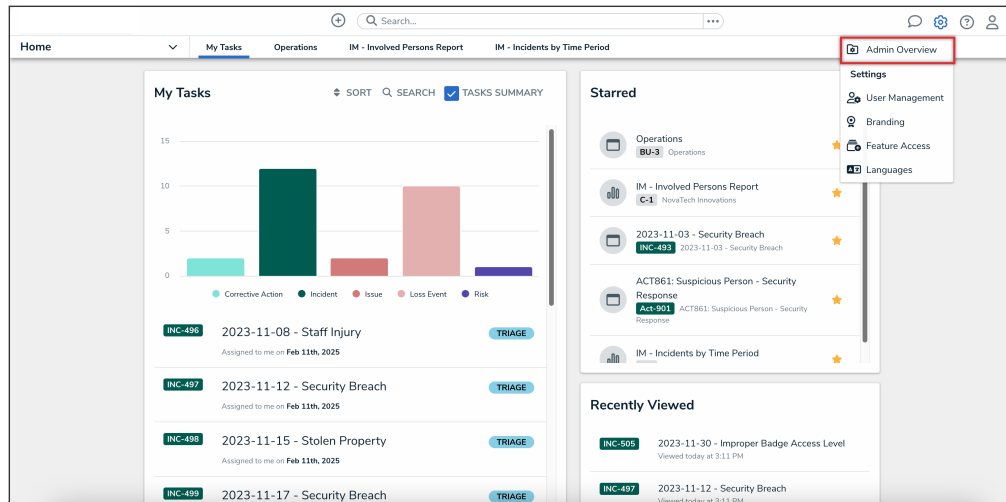
Navigation

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



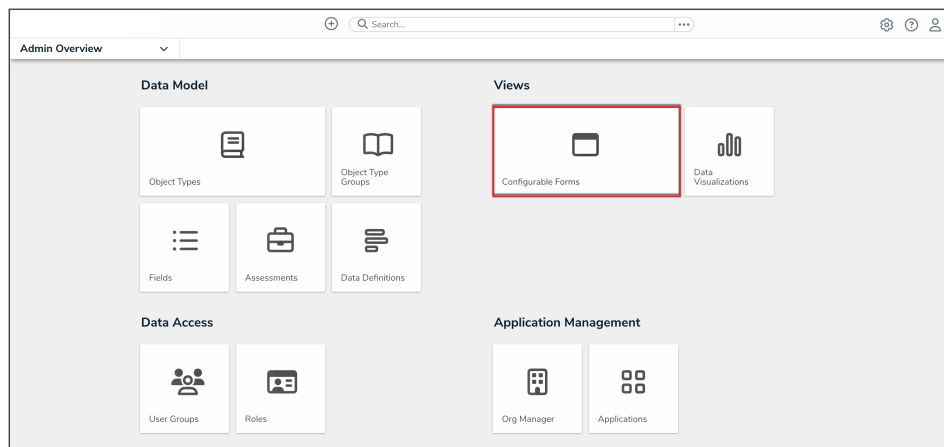
Administration Icon

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



Administrator Settings Menu

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



Configurable Forms Tile

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

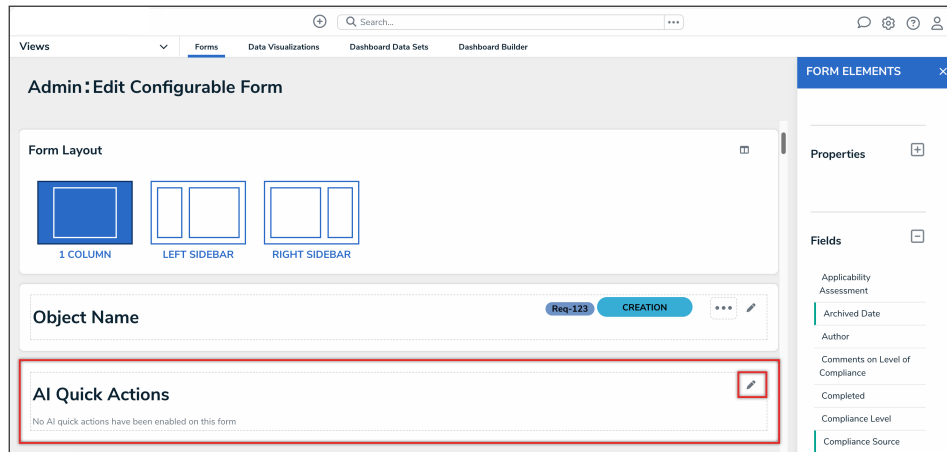
Adding Regulatory Summarization to a Form



Note:

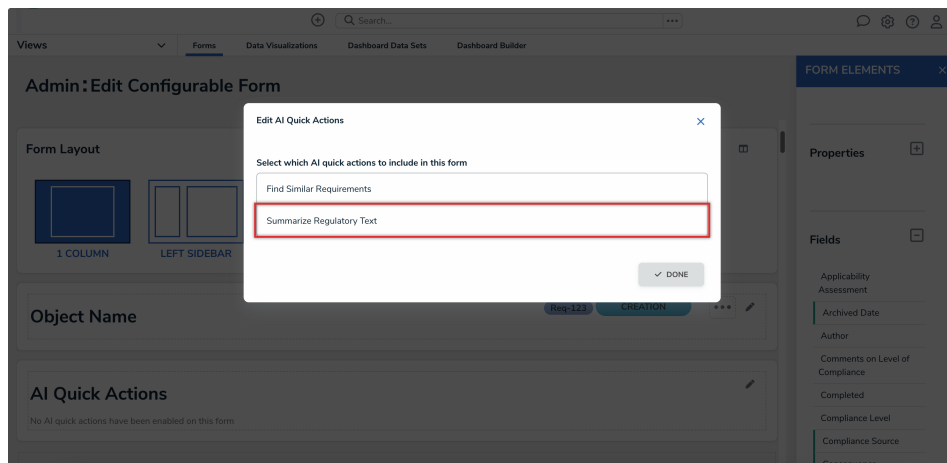
Regulatory Summarization can only be added to Requirement, Requirement Detail, and Sub-Topic object type forms.

- 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.



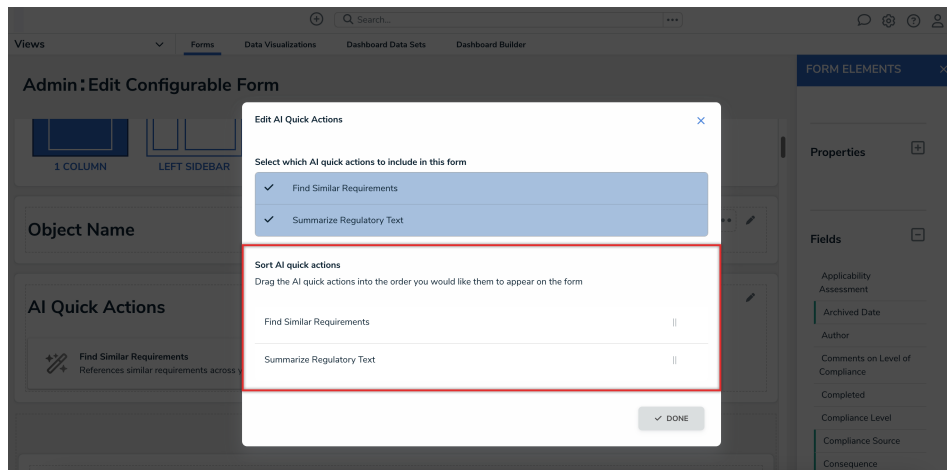
Summarize Regulatory Text Option



Note:

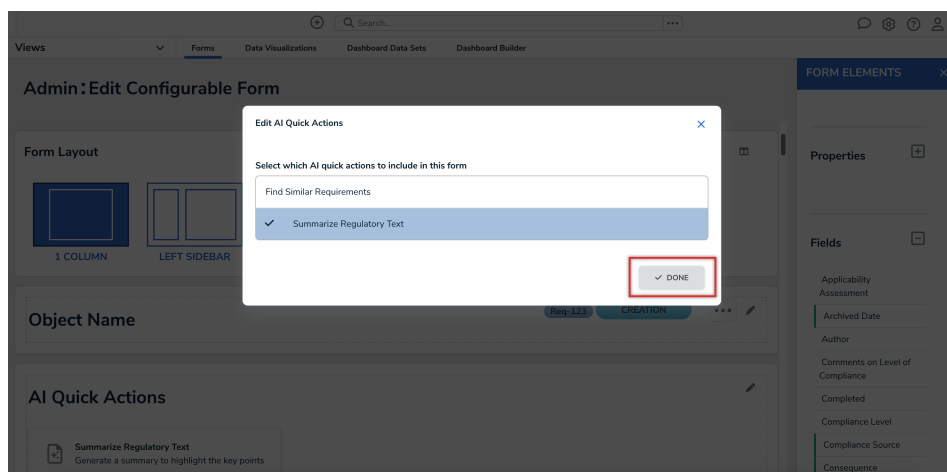
The selection options are dynamic based on which AI Quick Actions are enabled on your Org.

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



Sort AI Quick Actions Section

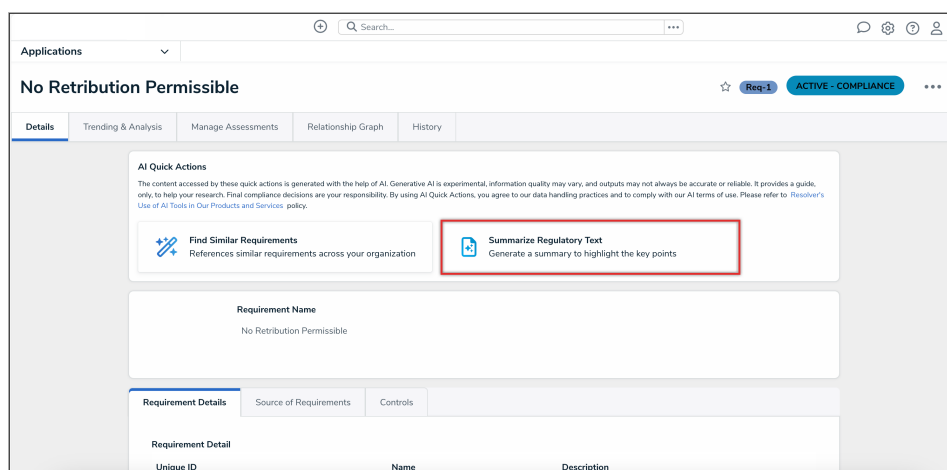
- Click the **Done** button to save your changes.



Done Button

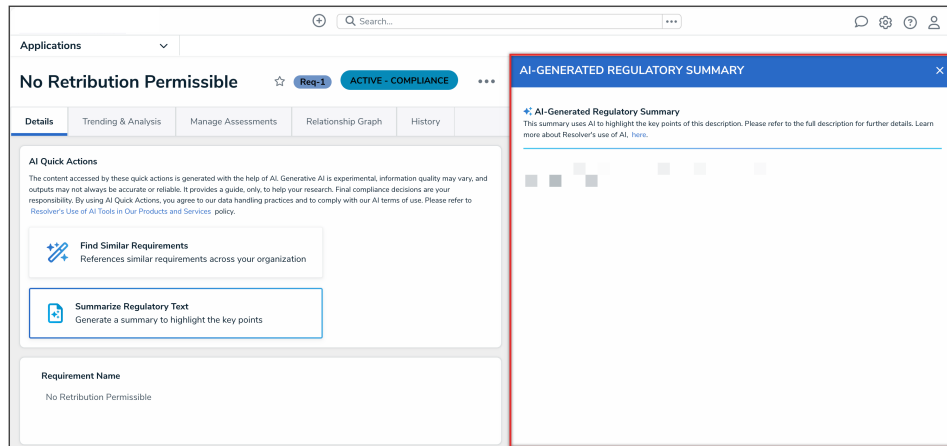
Using Regulatory Summarization on a Form

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



Summarize Regulatory Text Button

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



AI-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.