

Adding Requirement Similarity to a Form

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Overview

Requirement Similarity is an AI-powered feature that allows Compliance teams to identify similar regulatory obligations (requirements) both within the same framework and across different frameworks.

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 Requirement Similarity Feature on an Org](#) article.

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

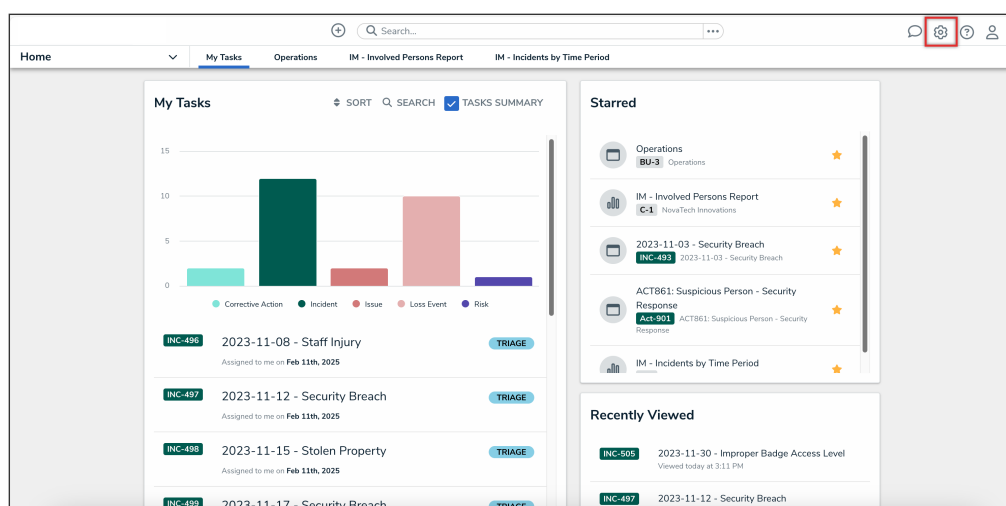


Tip:

Please refer to the [Requirement Similarity Information Sheet](#) for internal use, including sharing with your InfoSec or Legal teams if there are concerns about AI usage, and for a deeper understanding of the feature's technical details.

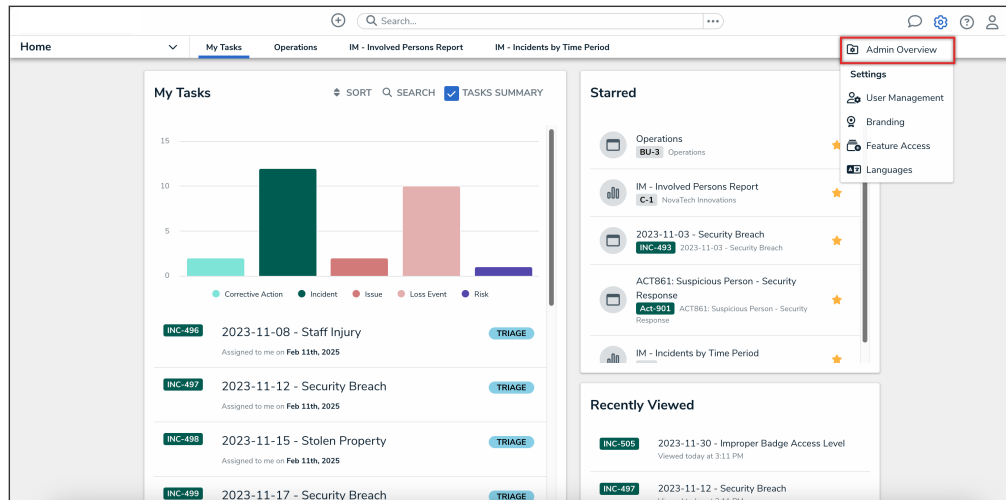
Navigation

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



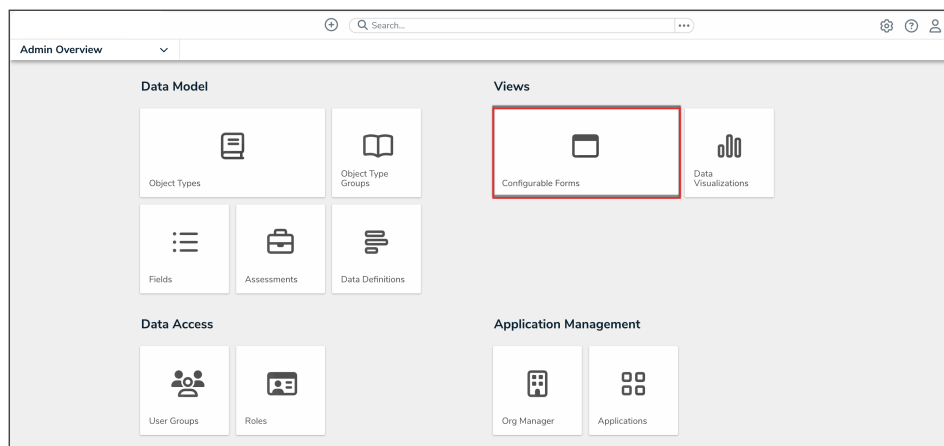
Administration Icon

- 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 **Requirement Similarity** to.

Adding the Requirement Similarity Feature to a Form

Note: *Requirement Similarity* only applies to Requirement object types.

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

The screenshot shows the 'Admin: Edit Configurable Form' interface. The 'Form Layout' section displays three options: '1 COLUMN', 'LEFT SIDEBAR', and 'RIGHT SIDEBAR'. Below this is the 'Object Name' field with a 'Req-123' tag and a 'CREATION' button. The 'AI Quick Actions' section is highlighted with a red box, and an edit icon (pencil) is visible in the top right corner of this section. The 'FORM ELEMENTS' sidebar on the right lists various fields like 'Applicability Assessment', 'Archived Date', 'Author', etc.

Edit AI Quick Actions Icon

2. Click the **Find Similar Requirements** option to select it.

The screenshot shows the 'Admin: Edit Configurable Form' interface with the 'Edit AI Quick Actions' dialog box open. The dialog box contains a list of options: 'Find Similar Requirements' and 'Summarize Regulatory Text'. The 'Find Similar Requirements' option is selected and highlighted with a red box. The 'DONE' button is visible at the bottom right of the dialog box.

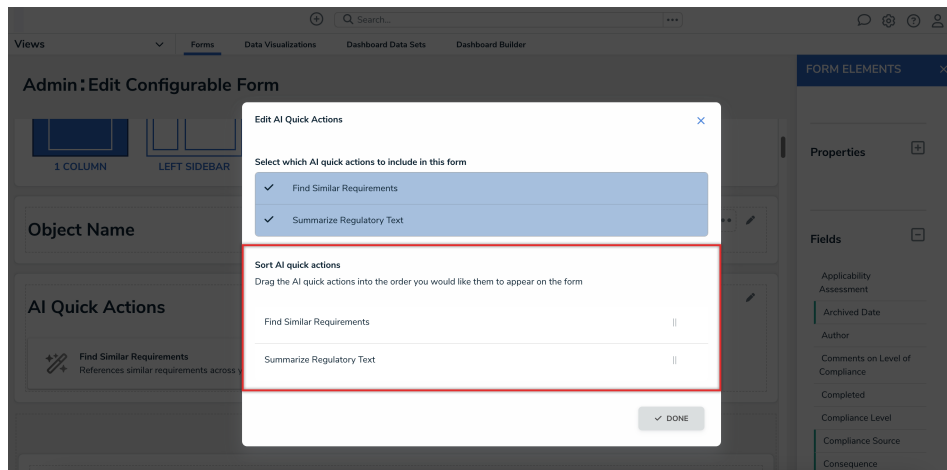
Find Similar Requirements Option



Note:

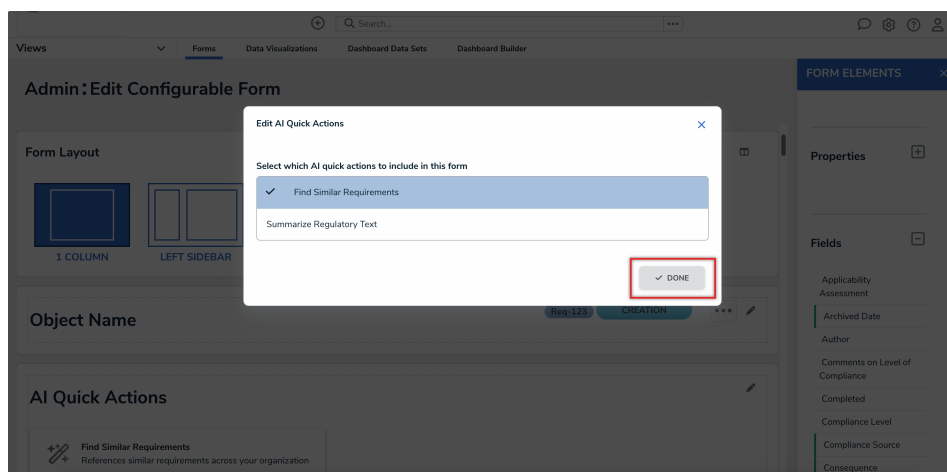
The selection options are dynamic based on which AI Quick Actions are enabled on your Org.

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

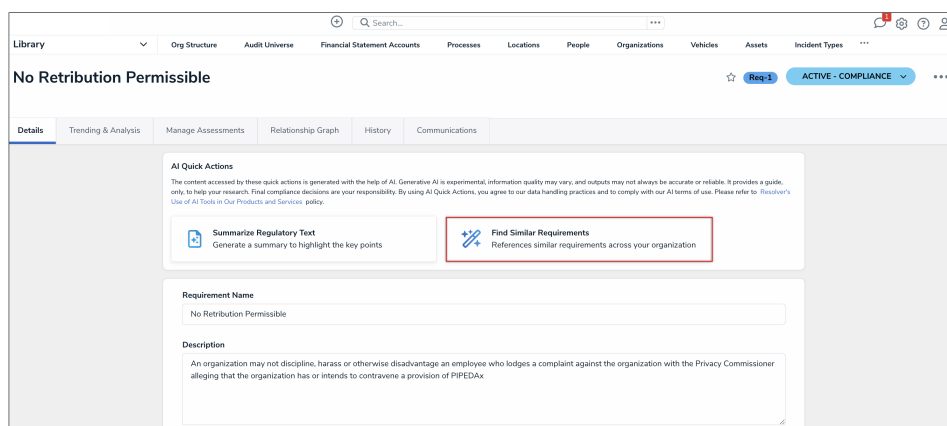
- Click the **Done** button to save your changes.



Done Button

Using Requirement Similarity on a Form

- Navigate to a form that you added **Requirement Similarity** to.
- From the **AI Quick Actions** card, click the **Find Similar Requirements** button.



Find Similar Requirements Button

3. An **AI-Identified Similar Requirements** palette will display showing any similar requirements.

The screenshot shows the Resolver interface with a search bar at the top. The main content area displays a requirement titled "No Retribution Permissible" under the "ACTIVE - COMPLIANCE" status. Below this, there are tabs for "Details", "Trending & Analysis", "Manage Assessments", "Relationship Graph", "History", and "Communications". The "Details" tab is active, showing "AI Quick Actions" such as "Summarize Regulatory Text" and "Find Similar Requirements". A "Requirement Name" field contains "No Retribution Permissible", and a "Description" field contains a paragraph about disciplinary actions. On the right, the "AI-IDENTIFIED SIMILAR REQUIREMENTS" palette is open, displaying a table with one row of results.

Unique ID	Requirement Name	Framework	Confidence Score
3	Audits	Privacy (Federal, BC, Alberta)	LOW

Page 1 of 1 | 1 Results | 10 per page

AI-Identified Similar Requirements Palette

4. If there are similar requirements available, they will be assigned a confidence score of Low, Medium, or High based on the similarity score.
 - Low = 0.4 - 0.59
 - Medium = 0.6 - 0.79
 - High = 0.8 - 1.0

AI-IDENTIFIED SIMILAR REQUIREMENTS			
Unique ID	Requirement Name	Framework	Confidence Score
3	Audits	Privacy (Federal, BC, Alberta)	LOW
Page 1 of 1 1 Results 10 per page			

Confidence Score Field

If there are no similar requirements, a **No similar requirements found** message will display in the palette.