

# Full report

Keep one record per AI feature, verify the facts, and publish a disclosure your team has reviewed.

## Fictional example

AI features recorded

**4**

Customer-ready

**1**

Published

**1**

Held

**1**

Re-checks due

**0**

Open actions

**4**

## 01 Features by state

| Feature                    | State          | Disclosure     | Re-check due | Owner        |
|----------------------------|----------------|----------------|--------------|--------------|
| F-01 · Smart Reply         | Published      | Published      | Jan 6, 2027  | Product lead |
| F-02 · Ticket Triage       | Customer-ready | Customer-ready | Jan 8, 2027  | Product lead |
| F-03 · Workspace Summaries | Held           | Internal only  | Not set      | Product lead |
| F-04 · Churn Signal        | Draft          | Internal only  | Not set      | Product lead |

## 02 Held, and waiting for specialist review

- **F-03 · Workspace Summaries:** Provider retention is Unverified for the summary model (A-03).
- **F-04 · Churn Signal:** specialist review not recorded yet. This feature may involve a decision about a person or business. Record a specialist review (name or role, date) before marking it Customer-ready. The kit does not decide whether any rule applies.

## 03 Re-checks due

No re-checks due.

## 04 Open actions

| Action                                                                                                       | Related | Owner               | Due          | Status      |
|--------------------------------------------------------------------------------------------------------------|---------|---------------------|--------------|-------------|
| A-01 · Add the summary model to the Northwind entry in the sub-processor list; evidence: list version 4.     | F-03    | Engineering manager | Oct 17, 2026 | In progress |
| A-03 · Confirm the provider retention setting for F-03; evidence: dated admin console screenshot.            | F-03    | Engineering manager | Oct 20, 2026 | Not started |
| A-02 · Complete the redaction check on pasted logs; evidence: dated test notes.                              | F-01    | Support lead        | Oct 22, 2026 | In progress |
| A-04 · Schedule a specialist review before any customer disclosure; evidence: review date and reviewer role. | F-04    | Product lead        | Oct 29, 2026 | Not started |

Reports need your review before sharing.

## 05 Feature summaries

### F-01 · Smart Reply Published

|                                             |                                                                                                                                                    |
|---------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>What it does</b>                         | Suggests replies to support tickets from the ticket text.                                                                                          |
| <b>On by default, and how to control it</b> | On by default. Can disable at account level. Setting: Settings, AI features, Smart Reply (account admins)                                          |
| <b>Model and provider, as recorded</b>      | Northwind Models API, business tier, reply model nw-reply-4 (fictional), version noted Oct 6, 2026. Third-party API. US region (fictional example) |
| <b>Data it processes</b>                    | Customer content, Personal data of customers' users                                                                                                |
| <b>Retention</b>                            | Provider: 30 days (checked Oct 6, 2026). Cedar Cloud Software: 90 days                                                                             |
| <b>Customer content used for training</b>   | Off, checked Oct 6, 2026. We do not fine-tune or train models on customer data                                                                     |
| <b>Human oversight</b>                      | The agent edits or discards every suggestion before it is sent. Nothing is sent automatically.                                                     |
| <b>Known limitations</b>                    | Suggestions can be wrong or incomplete, and can repeat details from the ticket.                                                                    |
| <b>Owner and reviewer</b>                   | Product lead · Engineering manager                                                                                                                 |
| <b>Decision about a person or business</b>  | No                                                                                                                                                 |
| <b>Specialist review</b>                    | Not needed                                                                                                                                         |
| <b>Evidence</b>                             | E-01, E-02, E-03, E-04                                                                                                                             |
| <b>Open items</b>                           | Logs pasted into tickets may contain personal data; the redaction check is open (A-02).                                                            |
| <b>Last reviewed</b>                        | Oct 9, 2026 by Engineering manager                                                                                                                 |

## F-02 · Ticket Triage Customer-ready

|                                             |                                                                                                                                                                         |
|---------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>What it does</b>                         | Routes new tickets to the right support queue.                                                                                                                          |
| <b>On by default, and how to control it</b> | Admin-enabled. Can disable at account level. Setting: Settings, Routing, Automatic triage                                                                               |
| <b>Model and provider, as recorded</b>      | Larkspur open-weights model (fictional), classifier version 2.3, run on Cedar Cloud servers, noted Oct 4, 2026. Self-hosted open-weights. US region (fictional example) |
| <b>Data it processes</b>                    | Customer content                                                                                                                                                        |
| <b>Retention</b>                            | Provider: No outside provider. Cedar Cloud Software: Routing history is kept with the ticket for 12 months.                                                             |
| <b>Customer content used for training</b>   | Not applicable: no outside provider. We do not fine-tune or train models on customer data                                                                               |
| <b>Human oversight</b>                      | Queue owners correct misrouted tickets, and each correction is logged.                                                                                                  |
| <b>Known limitations</b>                    | New kinds of tickets can be misrouted until a queue owner corrects them.                                                                                                |
| <b>Owner and reviewer</b>                   | Product lead · Engineering manager                                                                                                                                      |
| <b>Decision about a person or business</b>  | No                                                                                                                                                                      |
| <b>Specialist review</b>                    | Not needed                                                                                                                                                              |
| <b>Evidence</b>                             | E-04, E-05                                                                                                                                                              |
| <b>Last reviewed</b>                        | Oct 8, 2026 by Engineering manager                                                                                                                                      |

### F-03 · Workspace Summaries Held

|                                             |                                                                                                                                                         |
|---------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>What it does</b>                         | Summarizes a customer's own workspace pages on request.                                                                                                 |
| <b>On by default, and how to control it</b> | Off by default. Can disable per user. Setting: User settings, AI summaries                                                                              |
| <b>Model and provider, as recorded</b>      | Northwind Models API, business tier, summary model nw-summary-2 (fictional), noted Oct 3, 2026. Third-party API. US region (fictional example)          |
| <b>Data it processes</b>                    | Customer content                                                                                                                                        |
| <b>Retention</b>                            | Cedar Cloud Software: Not stored after the session.                                                                                                     |
| <b>Customer content used for training</b>   | We do not fine-tune or train models on customer data                                                                                                    |
| <b>Human oversight</b>                      | The user reads the summary; nothing in the workspace changes automatically.                                                                             |
| <b>Known limitations</b>                    | Summaries can leave out details.                                                                                                                        |
| <b>Owner and reviewer</b>                   | Product lead · Engineering manager                                                                                                                      |
| <b>Decision about a person or business</b>  | No                                                                                                                                                      |
| <b>Specialist review</b>                    | Not needed                                                                                                                                              |
| <b>Evidence</b>                             | E-02                                                                                                                                                    |
| <b>Open items</b>                           | Confirm the provider retention setting for the summary model (A-03). · Confirm whether workspace content is used to train or improve the summary model. |
| <b>Last reviewed</b>                        | Not recorded                                                                                                                                            |

### F-04 · Churn Signal Draft

|                                            |                                                                                       |
|--------------------------------------------|---------------------------------------------------------------------------------------|
| <b>What it does</b>                        | Scores accounts to prioritize customer-success outreach.                              |
| <b>Model and provider, as recorded</b>     | Internal scoring model (fictional), first version, noted Oct 10, 2026. Internal model |
| <b>Data it processes</b>                   | Usage data, Account metadata                                                          |
| <b>Human oversight</b>                     | Customer-success managers decide every outreach; the score only orders the list.      |
| <b>Owner and reviewer</b>                  | Product lead · Engineering manager                                                    |
| <b>Decision about a person or business</b> | Yes                                                                                   |
| <b>Specialist review</b>                   | Not recorded yet                                                                      |
| <b>Open items</b>                          | Schedule a specialist review before any customer disclosure (A-04).                   |
| <b>Last reviewed</b>                       | Not recorded                                                                          |

## 06 Change log

| Change                                                      | Feature | Date         | Type                     | Re-check | Completed   |
|-------------------------------------------------------------|---------|--------------|--------------------------|----------|-------------|
| CH-01 · The provider updated the Smart Reply model version. | F-01    | Oct 2, 2026  | Model or provider change | Yes      | Oct 6, 2026 |
| CH-02 · Account admins can now turn automatic triage off.   | F-02    | Sep 28, 2026 | Control change           | No       |             |

## 07 Evidence

| Evidence                                                          | Feature | Location                                    | Date or version          | Sharing                  |
|-------------------------------------------------------------------|---------|---------------------------------------------|--------------------------|--------------------------|
| E-01 · Provider admin console screenshot, training off            | F-01    | Security evidence folder, AI features, F-01 | Oct 6, 2026              | Share under NDA          |
| E-02 · Sub-processor list, version 3                              | F-01    | Trust page, Sub-processors                  | Version 3, Sep 30, 2026  | Can share with customers |
| E-03 · Retention policy excerpt                                   | F-01    | Policies folder, Data retention             | Version 2.1, August 2026 | Share under NDA          |
| E-04 · Support desk release notes (Smart Reply and Ticket Triage) | F-01    | Product release notes, October 2026         | Oct 1, 2026              | Can share with customers |
| E-05 · Human oversight design note                                | F-02    | Design documents, Support AI                | Oct 2, 2026              | Internal only            |

*This kit records what your team verifies about customer-facing AI features. It is not legal advice, certification, model evaluation or an independent assurance assessment. Contract, legal and regulatory questions need your normal specialist review. Reports need your review before sharing. Independent and not affiliated with any AI provider, standards body or regulator. © 2026 Extrasphere Media LLC*