Business AI assistant access checklist

Record the evidence, name an owner and agree the next action.

Organisation: _____ Owner: _____

System / workflow: _____ Review date: _____

- [ ] Choose one bounded business question.
- [ ] Name the owner for each approved source.
- [ ] Record source version, freshness and withdrawal rules.
- [ ] Define which roles may retrieve each source.
- [ ] Include restricted and conflicting documents in evaluation.
- [ ] Test unsupported, ambiguous and adversarial questions.
- [ ] Check citations against the actual source content.
- [ ] Define refusal and human escalation behaviour.
- [ ] Agree access, retention and provider terms.
- [ ] Monitor failures and re-evaluate after source changes.

Evidence / decisions / next actions

Read the guide and check the references before using this worksheet:
dyaustechnoservices.com/business-ai-assistant-sources-access-guide/