N8N-Governance Policy Generator

Setup & User Guide

Overview

The **N8N-Governance Policy Generator** by AI Solutions, Inc. is a powerful **n8n workflow** that automates the research, drafting, and delivery of AI governance policies tailored to organizational needs. Leveraging secure AI research agents, integration with EU and ABA resources, case law, and jurisdiction-specific regulations, the workflow produces a branded, shareable policy document, delivered as PDF and accessible via SharePoint.

- Automates policy research referencing the **EU AI Act**, **ABA Ethics Guidelines**, case law, and local regulations
- Drafts summaries, discussion guides, and implementation roadmaps using **OpenAI GPT-4**
- Uploads finalized policies to SharePoint & sends review links via Outlook email
- Customizable branding, logic, and output formatting

Prerequisites

- An active **n8n** instance (cloud or self-hosted)
- Administrator access to your n8n workspace
- **Microsoft SharePoint** API access for document uploads
- **Microsoft Outlook** API access for email dispatch
- Valid **OpenAI API credentials** for GPT-4 modules
- **SerpAPI API key** for AI-driven web research
- Access to a running **Gotenberg server** for HTML–PDF conversion
- Prepared SharePoint site, site ID, and folder for file storage
- Organization logo hosted at a public URL (optional, for document branding)
- **Sender email address** (licensed in Outlook) for automated emailing

Installation

1. **Download the Workflow JSON:**
   Receive or download the `N8N-Governance Policy Generator` workflow JSON file provided by AI Solutions, Inc.
2. **Log in to n8n:**
   Access your n8n dashboard as an administrator.
3. **Import the Workflow:**
   a. Click **"Import from file"** on the workflows page or open *Workflow Menu > Import from File*.
   b. Select the JSON file and upload.
   c. Rename as desired.
4. **Confirm the Node Count:**
   The imported workflow should contain **33 nodes**.
5. **Save and enable** the workflow after configuring all settings.

Configuration

The workflow uses secure connections, custom API keys, placeholders, and organizational information. Follow each step below carefully.

Placeholder Variables

Placeholder	Description	Where to find/configure	Required?
`YOUR_LOGO_URL`	Publicly accessible URL for your organization's logo. Used in document branding headers.	Upload logo image to a secure site/CDN and copy its direct link.	Optional but recommend
`YOUR_GOTENBERG_HOST`	Your Gotenberg server URL (e.g., `http://gotenberg.myorg.local`).	Check with IT or DevOps for your Gotenberg installation (see Gotenberg docs).	Yes
`YOUR_FOLDER_ID`	The unique identifier or path of the SharePoint folder where documents should be uploaded.	Create/locate the folder in SharePoint > Right-click > "Details" to view the ID (or in site admin panel).	Yes
`YOUR_SITE_NAME`	The human-readable SharePoint site name (e.g., `LegalDepartment`).	Found in SharePoint dashboard or site settings.	Yes
`YOUR_SHAREPOINT_SITE_ID`	The SharePoint *Site ID* for your target library.	Site settings > Site Information > Site ID (or via Microsoft Graph Explorer).	Yes
`YOUR_EMAIL`	The Outlook email address from which review messages will be sent (must be licensed/connected in n8n).	Usually your organizational address (e.g., `governancebot@yourdomain.com`).	Yes

Credential Types Required

Service	Credential Type in n8n	Scope/Permissions Required
Microsoft SharePoint	`Microsoft SharePoint OAuth2 API`	File read/write access to target SharePoint site and folder
Microsoft Outlook / Office 365	`Microsoft Outlook OAuth2 API`	Send mail as user (delegated), read mail
OpenAI	`OpenAI API (key)`	Access to `gpt-4` endpoints or higher
SerpAPI	`SerpAPI (key)`	Web search via SerpAPI REST endpoints

> **Note:** Add credentials in n8n's **Settings > Credentials** page before activating the workflow. Assign each credential to the required nodes using the "Select Credential" option.

Webhook Endpoint

- **Webhook Path:** `your-webhook-path`
- **HTTP Method:** `POST`
- **URL:** The full endpoint is visible on the **Form Submission Trigger** node. Provide this to your form tool or integration.

Usage

1. **Initiate Form Submission:**
   Configure your organization's form tool (e.g., Microsoft Forms, Typeform, custom webform) to send POST

requests to the workflow's webhook endpoint. The expected payload should include organization details, policy requirements, target jurisdictions, and any relevant context for the policy generator.

2. **Data Processing:**
   Upon receiving the submission, the workflow:
   - Validates and enriches form data
   - Triggers parallel AI research agents for:
     - **EU AI Act** (statutes and recent updates)
     - **ABA Ethics** (standards for lawyers & AI)
     - **Case Law** (recent and relevant precedents)
     - **Jurisdiction-specific laws** (as indicated in the form)
   - Aggregrates, merges, and summarizes research
3. **Policy Generation:**
   - Compiles an **Executive Summary**
   - Generates a **Discussion Guide**
   - Drafts a full **Policy Document** (integrating all research)
   - Adds a **Roadmap** for policy rollout
4. **Branding & PDF Conversion:**
   - HTML output is branded with your logo and org details
   - HTML document is converted to PDF using your Gotenberg server
5. **SharePoint Upload:**
   - PDF and (optionally) the HTML are uploaded to your configured SharePoint folder
   - Share links are generated and gathered
6. **Email Notification:**
   - A review email is generated (using your organizational template, if customized)
   - Email is sent from your designated account to policy reviewers or stakeholders, including share links
7. **Review & Monitor:**
   - Monitor n8n for workflow errors or alerts
   - Rest assured all steps (from research to delivery) are logged by the workflow

> **Tip:** You may further customize branding, executive summary prompts, and email style in the **Generate Branded HTML Output** and **Prepare Review Email** nodes.

Troubleshooting

- **Workflow not triggering?**
  – Double-check your webhook URL and ensure the form tool sends `POST` requests.
  – Confirm you have enabled the workflow in n8n.
  – Review "Process and validate data" node for input schema mismatches.
- **AI Research Agents error?**
  – Verify your **OpenAI** and **SerpAPI** credentials are valid and not rate-limited.
  – Look for error messages in node logs within n8n.
- **Gotenberg conversion fails?**
  – Confirm the `YOUR_GOTENBERG_HOST` URL is accessible from the n8n server.
  – Check server logs for Gotenberg-specific errors.
  – Ensure your HTML content is well-formed and includes no unclosed tags.
- **SharePoint upload/email fails?**
  – Confirm OAuth credentials in n8n have not expired.
  – Ensure the target SharePoint site, site ID, and folder ID are correct.
  – Make sure the sending email address is licensed and authenticated.
- **Policy document contains errors or wrong branding?**
  – Check and update the `YOUR_LOGO_URL` value.
  – Edit relevant n8n nodes for branding and output templates.
- **Unexpected outputs or warnings?**
  – Review the **Aggregate Research Results**, **Generate Branded HTML**, and **Prepare Review Email** nodes for template/logic errors.

Support

For expert assistance with setup, customizations, or workflow troubleshooting, contact the **AI Solutions, Inc.** team:

- Email: support@ais.email
- Web: automatedintelligentsolutions.com
- Phone: 404-293-0331