DOCUMENT 03 · TOOLS AND USE CASE REGISTER

SEVEN-G tools and use case register

The AI portfolio managed as a funnel: phases, timings, compliance and tags

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common data model	phases tracked with dates	catalogued tools	build waves

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THE ESSENTIALS Always mandatory

Every use case is registered in the use case register (T01 or a spreadsheet with the data model in section 4), with the dates of each phase, the decision of each gate, the status of each criterion, the conditions, the taxonomy tags and the coded stop or retirement reason. The tool catalogue (section 5) is for consultation.

Obligation matrix and layered reading (document 94)

01

Purpose

This document serves two functions:

1. It defines the **use case register**, the central SEVEN-G tool. It manages each AI use case the way a salesperson manages an opportunity in a CRM: it knows which phase the use case is in, how long it has been there, which criteria it meets and which it does not, what value is expected and why it was stopped if it did not move forward.

2. It maintains the framework's **tool catalogue**: which tools exist or are needed, what they are for, at what point in the cycle they are used, which document they depend on and when they should be built.

02

Tool design principles

#	Principle	What it means
1	**A single data model**	All tools read from and write to the same model (section 4). The board dashboard, reports and alerts are fed from the register, without re-entering data.
2	**Every change is a dated event**	Phase entries and exits, decisions and classification changes are recorded with date, author and reason. Without a history there is no measurement of timings and no audit.
3	**Controlled taxonomy**	The main tags use closed lists defined in the framework, so that the portfolio can be filtered, compared and aggregated. Free tags are allowed as a complement.
4	**Evidence linked, not copied**	The tools record the link, version and verification status of each piece of evidence; the document itself lives in the company's document repository.
5	**Portability**	The reference tools work without a server, in HTML with data in JSON, and export to spreadsheet. The data model can be implemented in the CRM, risk management tool or project management platform that the company already uses.
6	**The data belongs to the company**	The tools do not send data to third parties: what is entered is stored only in the browser of whoever enters it, and the backup is the exported JSON. Demonstrations always use fictitious data. Where the data is, what leaves the browser and how to install the site on your own server: document 95.
7	**"No data" is not zero**	A missing value is shown as missing and is never replaced by an undeclared estimate.
8	**Every cited code is navigable**	When a tool or a dashboard names a document, a template, another tool, a gate or a criterion (document 40, P12, T06, G3.05...), that code is a link to where it is explained, with its tooltip, and the navigation bar offers the "Global search" (by code, by title or by terms in the text of the whole site) and "Cited here", the list of everything that page or view names. The site's code index (`codigos.js`) does it, shared by documents, tools and dashboards; in the board dashboard it is enabled with `navegacion.codigos` .

2.1 Where the data of the tools lives

The reference applications (T01, T11 with T13, T14 and T15) are published with **fictitious sample data that nobody can change on the site**: the site is static and has no application server or database. What

each person enters is saved in one of three places, and the **"Data: ..."** button in the bar of each tool says which one it is and opens the "Where my data is" dialog to change it:

Where	What it is for	What to know
Only in the browser (default)	Trying the tool with your own data without installing anything.	Every change is saved in the local storage of that browser on that computer; nobody else sees it. It is lost if the browser is cleared and it is not available from another computer. The first time something is changed, the tool says so.
A JSON file on the computer	Real work by one person or a small team.	The tool rewrites the file with every change and reads it again when opened (Microsoft Edge or Google Chrome; in other browsers, export and import by hand). The file is the same one that "Export" downloads: it can be copied, shared, imported into another tool or used to regenerate the board dashboard (T17). It can live in a synchronised company folder.
A copy of the site on the company's server	The whole company seeing the same version of the portfolio.	The whole site (documents, templates and tools) is copied to an internal server. If that copy has the folder `herramientas/datos/` with a tool's file, the tool loads it instead of the sample data. Changes are still saved in each browser or in a file; publishing a new version means replacing the file in the folder.

Why it matters. Without this rule, someone entering the public site could believe they are editing a shared portfolio, or fear that their data stays on the site. Neither happens: nothing entered leaves the computer of the person who enters it, and the only thing that can be shared is a JSON file that the company keeps wherever it decides. Principle 6 (the data belongs to the company) holds by construction.

How to set up the company copy.

1. Download the whole site (the published repository or its generated folder) and serve it **over http** from an internal server: any static file server will do; no database or application server is needed. HTML files opened directly (double click) work, but they do not consult the data folder.
2. Create the folder `SEVEN-G/herramientas/datos/` and put in it the JSON files exported by the tools you use: `T01_registro.json` (use case register), `T11_calculadora.json` (value hypothesis and costs), `T14_indice.json` (transformation index) and `T15_madurez.json` (maturity diagnosis).
3. The board dashboard (T17) **regenerates itself in the browser**: it embeds the connector and, served over http, reads `T01_registro.json` from that folder and shows it to the whole company; in each browser where someone works with T01 it shows that browser's register. No Python and nothing to install. Only if the company wants to publish the dashboard as static files (to send them by e-mail, with the no-JavaScript view) does it use the `t01_a_panel.py` generator (Python 3.11 and `uv`, optional).
4. In each working session: export from the tool and replace the file in the folder. Whoever has changes in their browser or in their file keeps them; the "Where my data is" dialog shows them that the server holds a version and lets them load it.

5. No data leaves the company: the copy sends nothing to third parties. The aggregated visit measurement (document 04 §6.2) only acts on the public site's domains, never on an internal domain.

03

The use case register

3.1 The CRM analogy

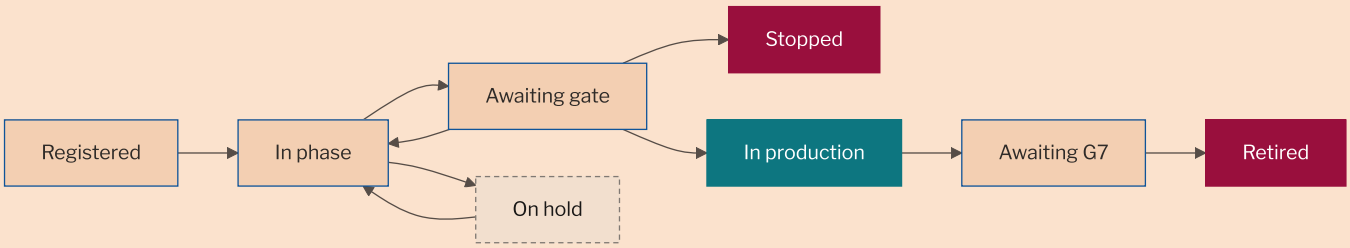
In a sales CRM	In the SEVEN-G use case register
Opportunity	**AI use case**
Funnel stage	**Lifecycle phase** (0–7)
Stage transition	**Decision gate** (*gate*) with recorded outcome
Days in stage	**Time in phase** and decision time for each gate
Requirements to advance	**Gate criteria**: met, not met, not applicable or pending, with evidence
Opportunity amount	**Expected value**; later, declared, estimated and validated value
Probability of closing	**Historical probability of reaching production** from each phase, calculated with the company's own data
Sales forecast	**Weighted portfolio value**
Loss reason	**Stop or retirement reason**, coded
Owner	**Sponsor and product owner**
Account or segment	**Area, sphere, ambition level, technology** and other tags
Activities	Linked **evidence, decisions, conditions, risks and incidents**
Stalled opportunities	**Use cases that exceed the reference time limit** for their phase

3.2 Use case statuses

In addition to the phase, each use case has a status that indicates what is happening to it.

Use case statuses

The phase shows where it is; the status, what is happening to it



Source: SEVEN-G

Status	Meaning	Counts towards time in phase
Registered	Idea registered, without an approved phase 0 yet.	No
In phase	The phase activities are being carried out.	Yes
Awaiting gate	Evidence submitted; awaiting verification and decision.	Yes, and decision time is also counted
On hold	Halted for a recorded external cause (budget, dependency, supplier, data). Requires a reason and an expected resumption date.	Measured separately
In production	G5 passed; in operation with continuity reviews.	Time in production is measured
Awaiting G7	Decision on scaling, iteration or retirement under way.	Yes
Stopped	Halted at a *gate* with a coded reason.	Closure
Retired	Retired after G7 with the retirement plan executed.	Closure

3.3 What is recorded

Use case record

Block	Main fields
Identification	Unique code (IA-AAAA-NNN), name, plain-language description of what it is and what it is used for, area, registration date.
Owners	Sponsor, product owner, technical owner, operations owner, risk owner and assigned auditor.

Block	Main fields
Classification	Primary and secondary sphere; proposed, confirmed and actual ambition level; intensity; regulatory classification; technology; exposure; suppliers.
Lifecycle	Current phase, status, phase entry date, reference time limit, current iteration.
Value	Expected value (efficiencies, return, recurring cost) with formula; realised value with validated, declared or estimated status; investment made and pending.
Risk and compliance	Main residual risk level, impact assessments carried out, open conditions, open nonconformities, incidents.
Free tags	Programme, strategic use case, internal customer or other company-specific groupings.

Controlled taxonomy

Tag	Values
Sphere	01 Customer · 02 Product and service · 03 People · 04 Operations · 05 Data · 06 Knowledge · 07 Decision · 08 Regulation, ethics and accountability · 09 AI governance
Ambition level	Optimise · Augment · Transform
Intensity	Express · Lite · Enterprise
Regulatory classification	Prohibited · High risk · Transparency obligations · Minimal risk · Out of scope · Pending classification
Technology	Predictive ML · Generative AI · Agent · Language and document processing · Vision · Optimisation · Embedded third-party AI · Rules (not AI)
Exposure	Internal · Employees · Customers indirectly · Customers or external persons directly
Value type	Efficiency · Return · Avoided risk · Compliance
Stop or retirement reason	No plausible value · Hypothesis refuted · Insufficient data · Technically unfeasible · Cost exceeds value · Unacceptable risk · Regulation · No adoption · Replaced by another solution · Change in strategic priority

Events

Each of the following occurrences generates an event with date, author and comment: registration; phase entry and exit; *gate* request; verification; decision with outcome; creation, fulfilment or expiry of conditions; placing on hold and resumption; change of classification (ambition, intensity, regulatory); incident; nonconformity; stop; retirement.

3.4 Decision gate compliance

Each *gate* is recorded as a list of criteria. Each criterion has one of four statuses:

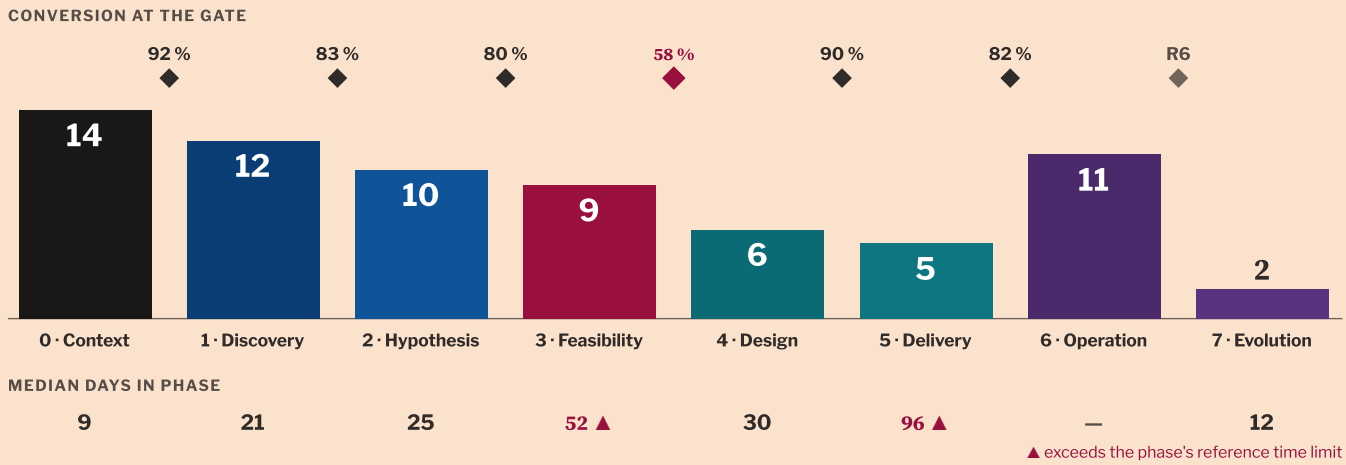
Status	Meaning
Met	The criterion is met and the linked evidence is verified.
Not met	The criterion is not met or the evidence is not valid.
Not applicable	The criterion does not apply because of the intensity, technology or classification, with justification.
Pending	The evidence or the verification is missing.

Based on these statuses, the register calculates the **gate compliance rate** (criteria met out of those applicable), shows **which criteria are blocking** the decision and prevents **Proceed** from being recorded if any mandatory criteria are *Not met* or *Pending*. The conditions of a **Proceed with conditions** outcome are recorded with a deadline and an owner, and trigger an alert when they expire.

3.5 Funnel metrics

The AI portfolio as a funnel

Use cases in each phase, median days in phase and conversion at each decision gate. Illustrative data



Illustrative data, not representing any organisation. Source: SEVEN-G

Metric	Definition	Purpose	Who uses it
Time in phase	Days between entry into and exit from the phase, excluding time on hold. Median and 80th percentile.	Detect bottlenecks.	AI Office, committee
Decision time	Days between the *gate* request and the decision.	Measure the agility of governance itself.	Committee, board
Time to production	Days from registration to G5; broken down into idea → feasibility approval (G3) → production.	Measure the real speed of the portfolio.	Committee, board
Conversion per gate	Percentage of use cases that proceed at each *gate* versus those that iterate, pivot or stop.	Know where the portfolio is filtered and whether the filter is in the right place.	Committee
Iterations per gate	Average number of iterations before the decision.	Detect poorly prepared evidence or unclear criteria.	AI Office
Stalled use cases	Use cases that exceed the reference time limit for their phase.	Act before they turn into cost with no return.	Committee
Time on hold	Days on hold and reasons.	Distinguish internal delays from external dependencies.	Committee
Stop and retirement reasons	Distribution of the coded reasons.	Learn which types of use case should not enter the portfolio.	Committee, C5
Gate compliance	Average compliance rate and the criteria that block most often.	Improve evidence preparation.	AI Office
Expired conditions	Open conditions past their deadline.	Prevent "with conditions" from becoming "without control".	Committee, audit
Value by phase	Expected value of the use cases in each phase.	See where the portfolio's value lies.	Committee, board
Weighted value	Sum of the expected value multiplied by the historical probability of reaching production from the current phase. Shown only when there is sufficient history.	Estimate the future value of the portfolio prudently.	Board
Ambition mix by phase	Distribution of Optimise, Augment and Transform in each phase.	Detect whether transformation bets get stuck before production (a transformation index signal).	Board
Cohorts	The above metrics by quarter of registration.	Check whether the system improves over time.	C5

All metrics can be segmented by any taxonomy tag: sphere, ambition, intensity, technology, area or supplier.

3.6 Reference time limits per phase

The time limits make it possible to identify stalled use cases. The company approves them in C2 and recalibrates them in C5 with its own data. The following values are **indicative, as a starting point**:

Phase	Lite	Enterprise
0 · Context and constraints	10 days	20 days
1 · Discovery	20 days	30 days
2 · Value hypothesis	20 days	30 days
3 · Feasibility and risk	20 days	45 days
4 · Solution design	20 days	45 days
5 · Delivery and validation	60 days	90 days
7 · Evolution or retirement	15 days	30 days
Gate decision (from the request)	5 working days	10 working days

Phase 6 has no time limit; it is controlled through the frequency of the continuity review.

3.7 Views

View	What it shows
Funnel	Use cases by phase and status, with time-limit alerts; can be filtered by tags.
Kanban board	Cards by phase that move when the *gate* decision is recorded.
Record	Use case data, event timeline, criteria for the current *gate*, conditions, risks and value.
Pending gates	Requests awaiting verification or decision, with days elapsed.
Alerts	Stalled use cases, expired conditions, overdue continuity reviews, evidence awaiting verification.

View	What it shows
Analysis	Funnel metrics, cohorts and segmentation.
Data	Import of one or several JSON files (replacing or merging by code) and export of the full register. The full JSON is the input of the board dashboard (T17): the connector converts it into the dashboard JSON, with the funnel and the time spent in each stage taken from the phases and events of the register.

04

Common data model

The model is the foundation of all the tools. Its full specification (fields, types, closed lists and validation rules) is the JSON schema of the register, `herramientas/T01_registro_iniciativas/esquema_registro.schema.json` (version 0.8), published with tool T01; each version extends it with optional fields only, so a file from an earlier version remains valid.

Entity	What it represents	Related to
Use case	The unit that goes through the lifecycle. Its scope states whether it belongs to one business unit, is cross-unit (with roll-out and adoption by unit) or is an enabling platform (with the use cases that rely on it); document 40 §7.2. From T01 schema 0.5, also the evidence for the transformation index: verification of IT-P2 and IT-P3 at a *gate*, verified human oversight, entire organisational unit redesigned and released, materialised and reassigned capacity (12 §4.4).	All the others
AI system	Each system in the inventory, in-house or third-party, including corporate use.	Use cases, suppliers, risks, incidents
Event	Any change with date, author and reason.	Use case
Gate decision	Request, verification, decision, outcome and iteration.	Use case, criteria, conditions
Assessed criterion	Status of each criterion in a *gate* decision.	Gate decision, evidence
Condition	Condition imposed with deadline, owner and status.	Gate decision
Evidence	Link, type, version, author, date and verification; origin (SEVEN-G template or referenced company evidence, with its source system; 21 §4.3).	Criteria, use case

Entity	What it represents	Related to
Value	Amounts by type (efficiency, return, cost), formula, validation status, period and, in cross-unit use cases, business unit; from schema 0.5, whether the return comes from an AI-enabled offering (signal 6 of 12). From schema 0.8, two optional use case fields read by the board dashboard: the realisation plan (`plan_realizacion` : status, source and date; curve by period, steady-state date, funding tranches with *gate*, amount and pass condition, approved reference and realised value by period with its status; 43 §4.1) and non-quantified value (`no_cuantificado` : dimension, level 0–3, metric with baseline, target and current value, and reason; never in euros; 40 rule 7).	Use case
Risk	Risk with probability, impact, inherent and residual level, owner and controls; from T01 schema 0.4, also impact axis, control effectiveness, target or verified residual, contingency, status, trend, next review and acceptance (33 §8.1).	Use case, system
Nonconformity	Type, detection, containment, root cause, action, closure.	Use case, system
Incident	Date, severity, detection, containment, notifications.	System, use case
Supplier	Third party, services, criticality, contract, assessment.	Systems, use cases
Recommendation	Board recommendation with persistent identifier, addressee, status and evidence.	Use cases, systems
Board decision	Decision of the board or its committee (DEC-YYYY-NNN) with body, type, subject, outcome, stage investment cap, stage decision, spheres with Transform as target, in the thesis the target ambition of each sphere (optional field `ambicion_objetivo` , read by the dashboard's impact map) and links (62 §10); schema 0.5. It is the source of signal 8 and condition IT-D1 of the index.	Use cases, recommendations
Maturity assessment	Summary of each maturity assessment (EM-YYYY-MM; document 11): cut-off date, mode, questionnaire version, overall level, weighted average, cap by D1 or D6 and level, progress and blocking criteria of each dimension. Since schema 0.7, also the summary of the NIST profiles derived from the questionnaire (AI RMF and CSF 2.0 : minimum level, subcategories with a level, with a target and with a gap, by function and, for the CSF, by area; 11 §7.5). Since schema 0.8, also the three-lens maturity at the cut-off date (`lentes`): technology footprint HT0–HT5 in use with its breadth and the pilots in exploration, impact reach of the use cases in use by IM1–IM4 and the alerts of 11 §7.6 (code, severity and dimension); footprint and reach do not change the level (D120). T15 writes it (answers and evidence stay in T15) and the board dashboard shows it; schemas 0.6 to 0.8.	Company

4.1 What each tool reads and writes

The T01 register is the company's **source of truth**: the other tools derive from it, show where each figure comes from and allow it to be corrected locally without the correction being lost when the register is read again. Nothing is estimated: whatever the register does not contain is left as "no data"

and completed by hand. Served from the same site, the tools share the browser's local storage, so T11, T14 and T15 find the register by themselves and return their results to it; opened as standalone files, the exchange is done with the JSON files each one exports and imports. The field-by-field detail is in `herramientas/mapa_datos.json`, which the coherence checks contrast with the schema.

Tool	Reads from T01	Returns to T01	Own to the tool
T11 (with T13)	Use case (name, ambition, intensity, phase, spent and pending investment) and the expected amounts recorded. A use case created from the register is **refreshed** when it is read again: identification, the amounts still "from T01" and new amounts are renewed; a line corrected by hand or broken down into units × unit value is kept.	The expected amounts of the use case (efficiencies, return, released capacity, recurring cost and investment), as expected with source T11, plus an edit event.	Parameters (horizon, rate, hourly cost), broken-down value lines, ramp-up, stop criteria, stages, costs per use case and reconciliation.
Transformation index calculator `(T14)`	Portfolio (phases, statuses, ambition, spheres, *gates*), realised and validated amounts, investment, index evidence of each use case, company data (revenue, IT-D3) and board decisions. A calculation made from the register is **refreshed** when it is read again: only the figures still marked "from T01" are renewed.	Nothing. Its result goes to the board dashboard (T17) and it leaves the profile of the latest calculation for the cross-reading in T15.	Threshold versions, calculations with the origin mark of each figure, notes and actions.
Maturity diagnosis `(T15)`	Company and a stratified sample of use cases (Enterprise, in production, Augment or Transform, third party, generative AI or agents; 11 §4.6). From T14, the profile of the latest calculation. For the three lenses: registration date, phase, technology, autonomy, actual ambition, closure and verification of IT-P2 and IT-P3 of each use case, the phase entries and the thesis approved by the board (C2 date).	The summary of each assessment (`madurez[]`): overall level, average, cap by D1 or D6, level by dimension and summary of the NIST profiles (`madurez[].perfiles`) and of the three lenses (`madurez[].lentes`); never the answers.	Answers, evidence, verification, interviews, samples, weights, targets, messages, improvement plan, the target and own levels of the NIST profiles and the footprint and reach entered by hand when there is no register.
T17 (generator)	The full JSON of the register: use cases, lifecycle, amounts, incidents, recommendations and the most recent maturity assessment; the realisation plan (`plan_realizacion`) and non-quantified value (`no_cuantificado`) of each use case, with the date of its next review (`ciclo.proxima_revision`); from T14, the exported index.	Nothing.	Dashboard configuration (thresholds, lifecycle, navigation) and the generated dashboards.

Tool	Reads from T01	Returns to T01	Own to the tool
Risk matrix and register (T06)	It is a view of the register itself. For the **Excel of the use case** (matrix, register, proposed mitigation and contingency plans and typical risks to consider) it reads, besides the use case's risks, its classification (technology, exposure, autonomy, regulatory classification, ambition, intensity and providers), its impact assessments, its systems and its owners.	Nothing: the Excel is a downloaded file with the generation date and time; whatever the team decides in it is recorded on the "Risks" tab.	The catalogue of typical risks with the applicability rules and the mitigation and contingency proposals per RT code (`catalogo_riesgos.json` ; the text of each typical risk is read from document 33 §9 when the tool is generated).
Board recommendations register (T18)	It is a view of the register itself.	—	—
Implementation journey (T23)	Technology and autonomy of the use cases in use and the pilots under way, to propose answers Q01 to Q03 of the questionnaire (marked "from T01" and editable). From T15, the answers of the most recent assessment, to mark milestones as achieved.	Nothing.	Questionnaire, archetype, status of each milestone and notes.

Why it matters. Without a source of truth, each tool ends up with its own version of the company: the transformation index computed with one portfolio, the board dashboard with another and maturity with a third. Establishing that everything derives from T01, that each figure carries its origin and that manual corrections are not overwritten means the board, the AI Office and the consultant read the same company in every tool.

05

Tool catalogue

Priority: 1 = core, built first · 2 = needed for full governance · 3 = complement. **Status:** Available (HTML application in `herramientas/`) · Applied with templates or documents (no dedicated application; the template or document indicated contains the full procedure).

5.1 Portfolio and lifecycle management

Tool	Purpose	Where it is used	Format	Depends on	Priority	Status
Use case register (T01)	CRM-style funnel: phases, statuses, events, tags, value and metrics.	Entire cycle; C3 and C4	HTML + JSON; export to spreadsheet	01, 02	1	Available v0.1
AI system inventory (T02)	Register of all systems, including third-party systems and corporate use.	C1, phase 0, C4	T01 module	01, 32	1	Available v0.1
Gate manager (T03)	Criteria with status, evidence, verification, decision and conditions.	All *gates*	T01 module	01, 21, 22	1	Available v0.1 (128 criteria from document 21)
Intensity determination (T04)	Express, Lite or Enterprise questionnaire (Enterprise criteria and Express eligibility) with recorded result.	Phase 0, G3, R6	T01 module	01	1	Available v0.1
Ambition classifier (T05)	Five questions for Optimise, Augment or Transform.	Phases 1, 2 and 7	T01 module	00, 12	1	Available v0.1

5.2 Risk, security and compliance

Tool	Purpose	Where it is used	Format	Depends on	Priority	Status
Risk matrix and register (T06)	Probability and impact assessment, heat map, inherent and residual risk, controls and their effectiveness, response, contingency and acceptance by the body for its level, with observations from the methodology (Critical without board approval, High without contingency, acceptance expired or by a lower body, review overdue), CSV export for spreadsheets and **Excel of the use case**: matrix, register, mitigation and contingency plans proposed from the catalogue of typical risks in document 33 §9 and applicable typical risks not registered, to include or discard with a reason.	Phase 3, phase 6, portfolio	T01 module ("Risks" view and record tab)	33	2	Available v0.1. Documented with P12 and P13
Regulatory classifier (T07)	Guided questionnaire for classification under the AI Act and the assessments required.	Phases 0 and 3	HTML	34	2	Applied with P11
Nonconformity and incident register (T08)	Full process with time limits and alerts.	Phase 6, C4	T01 module	37	2	Applied with P50 (nonconformity register), P51 (notifications and communications) and P52 (root cause), together with P26 and P27
AI supplier register (T09)	Third parties, criticality, contracts, assessment and dependency.	Phases 3–4, C4	T01 module	36	3	Applied with P57 (supplier register and exit plan), P55 (due diligence), P56 (contract clauses) and P14

Tool	Purpose	Where it is used	Format	Depends on	Priority	Status
Agent security assessment (T10)	Identity, permissions, intent-based access control, kill switch, injection testing; corporate AI gateway (SEG-26) and corporate agent test bench (SEG-27).	Phases 4–6	Checklist in T03	35	3	Applied with P18, P53 (adversarial testing), P54 (non-human identities and components) and the [AG] criteria in document 22

5.3 Value and measurement

Tool	Purpose	Where it is used	Format	Depends on	Priority	Status
Value hypothesis canvas and calculator (T11)	Baseline, value lines with formula (F1), annual net value, NPV, ROI, payback and F3 with the C2 horizon and rate; scenarios; C2 economic criterion as information; imports the use case from T01. Documented with P08, P09 and P10.	Phases 2, 3 and 7	HTML + JSON; CSV export	40	2	Available v0.1
Value realisation tracking (T12)	Validated, declared and estimated value by period and by use case; realisation plan with curve, funding tranches and pass condition, and realisation against the approved reference.	Phases 3–7, C4	T01 module (`plan_realizacion` block, schema 0.8) and "Realisation plan: curve and tranches" card in T17	40, 43	2	Applied with P28 and P62 (benefits realisation plan). It is not a separate application: the plan is recorded in the `plan_realizacion` block of each T01 use case and the board dashboard shows it (43 §4.1, 60 §10.6)

Tool	Purpose	Where it is used	Format	Depends on	Priority	Status
Cost calculator per use case (T13)	Full and incremental cost, total cost of ownership, allocation of shared costs, consumption forecast with alerts, cost per unit, cost of stopping and reconciliation. Documented with P10 and P63.	Phases 3 and 6	Module of T11 ("Cost per use case" view); CSV export	42	3	Available v0.1
Transformation index calculator (T14)	Baseline conditions, eight signals, company profile, alerts, coverage and evolution, with threshold version; starts from the T01 register JSON, from which it calculates the eight signals when it holds the schema 0.5 evidence, and its result feeds the index card of the board dashboard (T17).	C1, C4, C5	HTML + JSON	12	2	Available v0.1

5.4 Strategy and board

Tool	Purpose	Where it is used	Format	Depends on	Priority	Status
Maturity diagnosis (T15)	84-question questionnaire with evidence and verification; level by dimension and overall level capped by D1 and D6; comparison between assessments and report for the board; "Three lenses" view: technology footprint, impact reach, minimum required and alerts (11 §7.6). Template P34.	C1, C5	HTML + JSON; CSV export	11	2	Available v0.1

Tool	Purpose	Where it is used	Format	Depends on	Priority	Status
Portfolio sphere map (T16)	Heat map of spheres × ambition levels with investment and value; in the board dashboard (T17), card «Where the impact is» (60 §10.5).	C2, C3	Board dashboard view	10	2	Applied with document 10
Board AI dashboard (T17)	Oversight: value, cost, risk, compliance, incidents, agility, adoption; executive reading «What holds back scaling» (60 §10.4); realisation plan, pending tranches and non-quantified value (60 §10.6).	C4	Full and mobile HTML + JSON	60	1	Available. Fed from T01 through the connector `herramientas/T17_panel_consejo`: register (JSON) plus `config_panel.json` (indicator thresholds and lifecycle) → dashboard JSON → full and mobile dashboard, with a funnel and time per stage as in a CRM
Board recommendations register (T18)	Recommendations with persistent identifier, status, evidence and assessment.	C4	T01 module and HTML	62	1	Available v0.1: "Board (T18)" view of the T01 register, with decisions (DEC) and recommendations (REC); the T17 connector generates the register page from the recommendations in T01
AI thesis and risk appetite template (T19)	Board decision document, with thresholds and reference time limits.	C2	Document template	13	3	Applied with P35 (AI thesis and risk appetite)

Tool	Purpose	Where it is used	Format	Depends on	Priority	Status
Implementation journey (T23)	Twelve-question questionnaire; the company's starting point (archetype, traits and modifiers); journey by stage and by role with the 22 milestones of document 96, their evidence and the document 11 question that attests them; milestones achieved according to T15; printable plan.	Implementation; C1 and C5	HTML + JSON; CSV export	96	2	Available v0.1

5.5 People and operations

Tool	Purpose	Where it is used	Format	Depends on	Priority	Status
Adoption and capacity plan (T20)	Adoption, training and reassignment of released capacity.	Phases 4–7	Template and T01 module	23, 50	3	Applied with P20 and P45 (AI literacy and training plan and register); the released, materialised and reassigned capacity of each use case is recorded in T01 (schema 0.5)
Corporate AI use monitor (T21)	Assigned and active licences, unauthorised use, data leakage controls.	C4	Board dashboard view	31	3	Applied with P43 (catalogue of authorised tools and requests)
Retirement manager (T22)	Retirement plan, replacement, data and models, communication.	Phase 7	T01 module	14	3	Applied with P30

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Build order

Wave	Tools	When	Result
Wave 1 · Core	T01 with T02, T03, T04 and T05; adaptation of T17 and T18 to be fed from the register.	After document 02 (Glossary), which sets names and lists.	Portfolio managed as a funnel, with tracked *gates* and a connected board dashboard.
Wave 2 · Full governance	T06, T07, T08, T11, T12, T14, T15, T16.	As documents 11, 12, 33, 34, 37 and 40 are completed.	Risk, compliance, value, maturity and transformation index operational.
Wave 3 · Complements	T09, T10, T13, T19, T20, T21, T22, T23.	With documents 13, 14, 23, 31, 35, 36, 42 and 50.	Full coverage of the framework.

Working rule: **every document that defines a process involving a register, a calculation or a questionnaire specifies the associated tool**, and the tool is built or updated when that document is closed.

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Related documents

Document	Relationship
01 · Foundational methodology	Phases, statuses, *gates*, roles and intensity tracked by the register.
02 · Glossary	Names and lists for the controlled taxonomy.
12 · Transformation index	Signals calculated with register data.
21 and 22 · Gate criteria and checklists	Content of the *gate* manager.
40 · Value measurement rules	Rules applied by the value modules.
60 and 62 · Board pack and register of recommendations	Outputs to the board.

08

Version control

Version	Date	Changes
0.1	16-09-2026	First version. Defines the use case register as a managed funnel, with its taxonomy, events, metrics and reference time limits; the common data model; the catalogue of 22 tools; and the build order.
0.2	19-09-2026	Catalogue brought up to date: T11 (with T13 as a module) and T15 available; tools without an application of their own are applied with their corresponding templates P32–P71 (D68).
0.3	28-09-2026	Tool T23 · Implementation journey (document 96) in the catalogue (§5.4), in the data map (§4.1) and in wave 3; "Three lenses" view of T15 and schema 0.8 of the register (§4 and §4.1).
0.4	28-09-2026	T12 is implemented as the `plan_realizacion` block of T01 plus the "Realisation plan: curve and tranches" card of T17 (§5.3); optional fields `plan_realizacion` and `no_cuantificado` of schema 0.8 (§4) and their reading by T17 (§4.1 and §5.4) (D135).
0.5	19-10-2026	The T10 row includes the corporate AI gateway (SEG-26) and the corporate agent test bench (SEG-27) (D159).
0.6	19-11-2026	The "Document finder" also searches terms in the text of the whole site (principle 8, D199).
0.7	20-11-2026	The "Document finder" is renamed "Global search" (principle 8, D200).

External sources cited

Links to the official or primary source, checked before publication. Always verify the version in force on the date of use.

Regulation (EU) 2024/1689 of the European Parliament and of the Council of 13 June 2024 laying down harmonised rules on artificial intelligence (Artificial Intelligence Act) · https://eur-lex.europa.eu/eli/reg/2024/1689/oj/eng · Parlamento Europeo y Consejo de la UE · 13-06-2024

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