Credo AI | Configuring and Testing Webhooks

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About Webhooks

Webhooks allow customers and 3rd parties to monitor specific events of interest within the CredoAI platform, enabling automated data transfers to your server as events occur.

Utilizing webhooks eliminates the need for repetitive API polling to verify data presence. Once configured, webhooks ensure timely data delivery, eliminating the need for further intervention.

Webhooks can be effectively employed to track updates to use cases, new task assignments, and status updates for reviews, enhancing operational efficiency and responsiveness.

Webhook testing user flow:

1. Generate a URL using your existing event server, or if you do not have on, via Svix Playground

2. Create a webhook using a POST request in Postman. The POST request should include configuration information such as the url of your event server and the event_type subscriptions.

3. Make changes in the app that correspond to the events you subscribed to

4. View payload of event and change in Svix Playground

Configuring Webhooks

Note: this guide assumes that you are familiar with the CredoAI API and already know how to handle authentication with the platform.

Webhooks can be created and managed via the CredoAI API. When creating your webhooks, you

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This is an example of a typical request used to create a webhook:

POST {{url}}/api/v2/{{tenant}}/webhooks

```
1  {
2    "data": {
3      "attributes": {
4        "description": "Webhook for order creation events",
5        "event_types": [
6          "use_case_governance_status_updated",
7          "use_case_custom_field_updated"
8        ],
9        "url": "https://example.com/webhooks/orders",
10       "event_type_prefix": "CredoAI",
11       "event_type_suffix": "v1",
12       "environment": "production",
13       "authentication_method": "o_auth",
14       "authentication_payload": {
15         "key": "secret_key_value"
16       },
17       "authentication_payload_type": "application/json",
18       "authentication_server": "https://auth.example.com"
19     }
20   }
```

```
     21    }
```

Field	Required?	Description
description	Required	A human readable description of the webhook
		... below for more details.
url	Required	The endpoint the webhook should hit once triggered
event_type_prefix	Optional	The type field in the payload sent to your event server will be prefixed with this
event_type_suffix	Optional	The type field in the payload sent to your event server will be suffixed with this
environment	Optional	The environment used, such as prod/qa/staging
authentication_method	Required	How will the payload be authenticated? Options: none, o_auth
authentication_payload	Required if using o_auth as authentication	The payload to be sent to the authentication server when using OAuth authentication
authentication_payload_type	Required if using o_auth as authentication	Payload type used for authentication. Options: application/json, application/x-www-form-urlencoded
authentication_server	Required if using o_auth as authentication	Server used for OAuth authentication

Event Types

In the CredoAI platform, Webhooks support a variety of event types:

Application Event	WEBHOOK EVENT	Status	Notes
			field
	`use_case_risk_classification_level_updated`	Hard Deprecated	
	`use_case_risk_category_level_updated`	Active	Replaces Hard Deprecated `use_case_risk_classification_level_update`
:task_created :task_updated	`use_case_review_task_status_updated`	Active	When `task.type == :use_case_review`
:task_deleted	`use_case_review_task_deleted`	Active	When `task.type == :use_case_review`
:use_case_review_created :use_case_review_closed	`use_case_review_status_updated`	Active	
:use_case_review_action_updated :use_case_review_action_created	`use_case_review_comment`	Soft Deprecated	Only when `action.type == :comment`
:entity_custom_field_deleted	`use_case_custom_field_updated`	Active	

:entity_custom_field_updated			
:comment_created	use_case_comment	Active	Replaces Soft-Deprecated use_case_review_c

:comment_updated	use_case_comment	Active	Replaces Soft-Deprecated use_case_review_c
	use_case_review_comment	Soft Deprecated	Duplicate emission for backward compatibility

Use Case Events

```
Use Case Metadata Updated

event_type_format: use_case_#{metadata_entity}_updated
```

Triggers when metadata has been updated. Possible use case metadata entities include:

- governance_status: `use_case_governance_status_updated`
- risk_category_level: `use_case_risk_category_level_updated`
- name: `use_case_name_updated`
- icon: `use_case_icon_updated`
- description: `use_case_description_updated`
- industries: `use_case_industries_updated`
- regions: `use_case_regions_updated`
- ai_type: `use_case_ai_type_updated`

- is_vendor: `use_case_is_vendor_updated`

- questionnaire_ids: `use_case_questionnaire_ids_updated`

In the given example, `governance_status` has been updated. This example responds to an `event_type` called `use_case_governance_status_updated`.

```
 2      "data": {
 3        "changedFieldName": "governance_status",
 4        "useCaseId": "d8zdKJNgwCgKmvN8QkSQ2H",
 5        "user": {
 6          "email": "steven+1@credo.ai",
 7          "familyName": "Barber",
 8          "givenName": "Steven",
 9          "job": null,
10          "nickname": "Steven",
11          "role": "admin",
12          "userId": "G7kYiogzZE4Zxt2iGkhht9"
13        },
14        "value": 1
15      },
16      "source": "CredoAI",
17      "subject": "governance_status_updated",
18      "time": "2024-04-26T21:30:20.055675Z",
19      "type": "CredoAI.use_case_governance_status_updated"
20    }
```

Custom Field Updated

event_type_format: `use_case_custom_field_updated`

Triggers when custom metadata is updated. `customFieldId` can be used to determine what custom field has been updated. In this case, a custom field called "Target Review Date" with an ID of `qPSHywBSDF9HXwBVvrwKJ2` has been updated.

```
1  {
```

```
 4        "customFieldName": "Target Review Date",
 5        "customFieldType": "number",
 6        "useCaseId": "QHG9s995aVztB6Xc3caXyW",
 7        "user": {
 8          "email": "steven+1@credo.ai",
 9          "familyName": "Barber",
10          "givenName": "Steven",
11          "job": "data_scientist",
12          "nickname": "steven+1",
13          "role": "admin",
14          "userId": "TuC8qELwNoq9V27Y2cvqHf"
15        },
16        "value": "05/23/2024"
17      },
18      "source": "CredoAI",
19      "subject": "cf_qPSHywBSDF9HXwBVvrwKJ2_updated",
20      "time": "2024-04-23T20:35:11.840965Z",
21      "type": "CredoAI.use_case_custom_field_updated"
22  }
```

Use Case Comment

event_type_format: use_case_comment

Triggers when a comment (or reply) is added or updated on a use case.

The webhook event's `data` payload has the following fields:

- `commentId` – the ID of the comment that was create or updated
- `threadId` – the ID of the comment thread to which the comment belongs

- `usecaseId` – the ID of the use case
- `resourceType` – the type of resource the comment thread is attached to (`none` , `control` , `question` , `evidence_requirement` , or `review_action`)
- `resourceId` – the ID of the resource the comment thread is attached to
- `parentQSectionId` – the ID of the questionnaire section containing the resource when `resourceType` is `question` , or `null`
- `parentEntityControlId` – the ID of the use case risk or compliance control containing the resource when `resourceType` is `evidence_requirement` , or `null`
- `parentUseCaseReview_id` – the ID of the use case review containing the resource when `resourceType` is `review_action` , or `null`
- `Type` – the new event type `CredoAI.use_case_comment`
- `eventName` – the specific name/trigger of the event (`comment_created` or `comment_updated`)

Use Case Review Events

`Use Case Review Comment` – **DEPRECATED**

`event_type_format: use_case_review_comment` – **DEPRECATED**

Triggers when a comment is added to a review, or when a comment on a review is replied to. This example responds to an `event_type` defined as `use_case_review_comment` .

```
1  {
```

```
 2      "data": {
 3        "actionId": "9A6DwehJSG2UBeaHuCoFcP",
 4        "comment": "Hello @[John Doe](users:MMC8qELwNoq9V27Y2cvqHf) ",
 5        "reviewId": "yzbEcKRh3M6xNXYmuTownS",
 6        "taggedUsers": [

 9          "user_id": "MMC8qELwNoq9V27Y2cvqHf"
10        }
11      ],
12      "useCaseId": "QHG9s995aVztB6Xc3caXyW",
13      "user": {
14        "email": "steven+1@credo.ai",
15        "familyName": "Barber",
16        "givenName": "Steven",
17        "job": "data_scientist",
18        "nickname": "steven+1",
19        "role": "admin",
20        "userId": "TuC8qELwNoq9V27Y2cvqHf"
21      }
22    },
23    "source": "CredoAI",
24    "subject": "use_case_review_comment",
25    "time": "2024-04-22T21:41:57.189315Z",
26    "type": "CredoAI.use_case_review_comment"
27  }
```

Use Case Review Status Update

`event_type_format: use_case_review_status_update`

Triggers when a use case review is created, or when it's status is updated

```
 1  {
 2    "data": {
 4      "status": "in_progress",
 5      "useCaseId": "ZiSPid3wLeXWTe4VTRjbq9",
 6      "user": {
 7        "email": "steven@credo.ai",
 8        "familyName": "Barber",
 9        "givenName": "Steven",
10        "job": null,
11        "nickname": "steven",
12        "role": "admin",
13        "userId": "FSZqZLT8eFUUp53uTM6Ref"
14      }
15    },
16    "source": "CredoAI",
17    "subject": "use_case_review_status_updated",
18    "time": "2024-04-30T03:45:01.621406Z",
19    "type": "CredoAI.use_case_review_status_updated.v1"
20  }
21
```

Use Case Review Task Events

Use Case Review Task Status Updated

event_type_format: use_case_review_task_status_updated

Triggers when the status of a use case review task is updated.

```
 3          "assignedUserId": "FSZqZLT8eFUUp53uTM6Ref",
 4          "assignerId": "FSZqZLT8eFUUp53uTM6Ref",
 5          "reviewId": "pu7rBDgxfVnK4RTQyb88uL",
 6          "status": "done",
 7          "subStatus": "approve",
 8          "useCaseId": "ZiSPid3wLeXWTe4VTRjbq9",
 9          "user": {
10              "email": "steven@credo.ai",
11              "familyName": "Barber",
12              "givenName": "Steven",
13              "job": null,
14              "nickname": "steven",
15              "role": "admin",
16              "userId": "FSZqZLT8eFUUp53uTM6Ref"
17          }
18      },
19      "source": "CredoAI",
20      "subject": "use_case_review_task_status_updated",
21      "time": "2024-04-30T04:21:14.805975Z",
22      "type": "CredoAI.use_case_review_task_status_updated.v1"
23  }
```

Use Case Review Task Deleted

event_type_format: use_case_review_task_deleted

Triggers when a use case review task is deleted.

```
 3            "assignedUserId": "FSZqZLT8eFUUp53uTM6Ref",
 4            "assignerId": "FSZqZLT8eFUUp53uTM6Ref",
 5            "reviewId": "pu7rBDgxfVnK4RTQyb88uL",
 6            "useCaseId": "ZiSPid3wLeXWTe4VTRjbq9",
 7            "user": {
 8                "email": "steven@credo.ai",
 9                "familyName": "Barber",
10                "givenName": "Steven",
11                "job": null,
12                "nickname": "steven",
13                "role": "admin",
14                "userId": "FSZqZLT8eFUUp53uTM6Ref"
15            }
16        },
17        "source": "CredoAI",
18        "subject": "use_case_review_task_deleted",
19        "time": "2024-04-30T04:21:19.026290Z",
20        "type": "CredoAI.use_case_review_task_deleted.v1"
21    }
```

Testing your Webhooks

Before relying on your webhooks, it's important that you test your configuration.

Step 1: Configuring your test endpoint

1. Navigate to <u>Svix Playground</u>

2. Click "Start Now"

3. Bookmark the current page, and copy the value shown here. You will use this as the url when configuring your webhook in **Step 2**

Svix Play

LISTENING ON
https://play.svix.com/in/e_tgYiSEzxV0xiGme2P91vAO8vV9L/ ↻

Echo Mode

About

Messages   0

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https://play.svix.com/in/e_tgYiSEzxV0xiGme2P91vAO8vV9L/
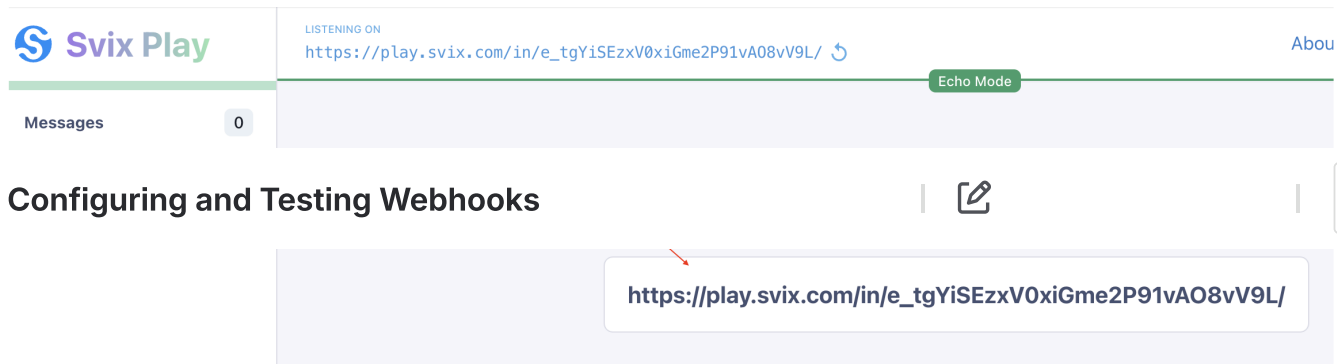
Step 2: Creating your webhook

Using the new url from your new test endpoint or existing event server, create your webhook via the API described above. You will need to authenticate and following similar practices to other APIs in the CredoAI API.

If you are using a test endpoint from Svix Playground, you can set "authentication_type" to "none". Otherwise, if you are using your own event server, set the authentication information appropriately.

You can use any valid event types to test your webhook, but a good one to test with is "use_case_governance_status_updated".

Step 3: Make a change to your use case

Assuming that you set "use_case_governance_status_updated" as an event type, you can test by navigating to the Use Case Settings page, updating the governance status for the use case, and then changing it back.
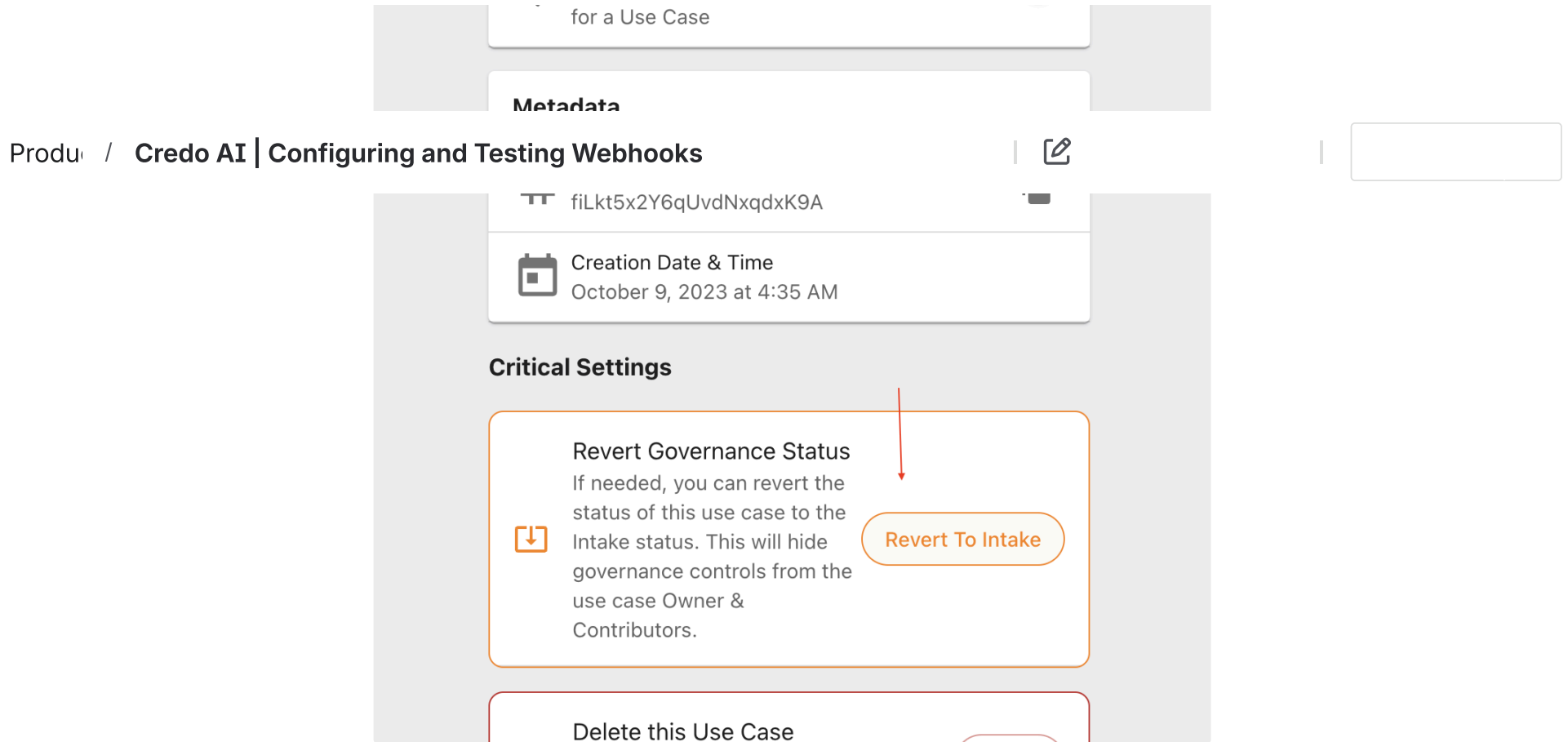
Step 4: View the results

If you used an existing event server, confirm that the appropriate message was received by your server. If you're using Svix Playground, return the URL that you bookmarked in **Step 1**. You should see one or more new messages in the top left corner. Click on one of the messages to see the payload.

Svix Play

Echo Mode   VIX-TIMEST

USER-AGENT

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POST bI4VZo
April 30, 2024 at 1:56 PM

Request Body

```
▼ { 5 items
    ▼ "data" : { 4 items
        "changedFieldName" : string "governance_status"
        "useCaseId" : string "fiLkt5x2Y6qUvdNxqdxK9A"
        ▼ "user" : { 7 items
            "email" : string "steven+1@credo.ai"
            "familyName" : string "Barber"
            "givenName" : string "Steven"
            "job" : NULL
            "nickname" : string "Steven"
            "role" : string "admin"
            "userId" : string "G7kYiogzZE4Zxt2iGkhht9"
        }
        "value" : int 1
    }
    "source" : string "CredoAI"
    "subject" : string "use_case_governance_status_updated"
    "time" : string "2024-04-30T20:56:45.939792Z"
```

+ Add label

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
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