



Approval Pathway Checklist: SPERT® Suite at [ORGANIZATION]

Template

Fill-in template: every approval step, owner, date and decision in one place · spertsuite.com/approval-kit

SPERT® Suite Approval Kit v1.0.0 (Release) · Content reviewed 2026-10-25 · Built 2026-10-26

Prepared by: [PROJECT MANAGER NAME] · **Sponsor:** [SPONSOR NAME, ROLE] · **Request reference:** [REQUEST ID]

Apps requested: [APPS REQUESTED] · **Tiers requested:** [TIERS REQUESTED] · **Target decision date:** [DATE]

Kit facts reviewed against: SPERT® Scheduler 0.79.26, SPERT® Story Map 0.53.14, SPERT® Forecaster 0.47.4, SPERT® CFD 0.15.23, GanttApp™ 0.29.8, MyScrumBudget™ 0.44.4; [spert-landing](#) 2.7.2; [Terms of Service](#) v1.4, [Privacy Policy](#) v1.4, [AI Privacy Notice](#) v2.3, [AI Connectivity Consent Notice](#) v2.2. **Review date:** 2026-10-25.

This checklist supports an approval process. It is not legal, compliance or security advice. Decisions and attestations are for [ORGANIZATION] to make.

For the project manager. Work top to bottom; skip the rows that do not apply to the tiers you are requesting. Mark each box with an X when done, and record who and when. The *Approval Guide* explains each step. Delete this box before you share the checklist.

A. PREPARE

Done	Step	Owner	Date	Notes
☐	Choose the apps for the pilot, and only those	[NAME]	[DATE]	[NOTES]
☐	Choose the tiers: 1 (local-only) / 2 (cloud storage) / 3 (Connect AI)	[NAME]	[DATE]	Start with tier 1
☐	Find [ORGANIZATION]'s data classification scheme; propose the highest classification allowed in the apps	[NAME]	[DATE]	Must be within ToS §5.3
☐	Identify the intake route (software request, architecture board, vendor-risk process)	[NAME]	[DATE]	[INTAKE ROUTE]
☐	Check spertsuite.com/approval-kit for a newer kit, and spertsuite.com for newer legal documents	[NAME]	[DATE]	Kit version: [VERSION]
☐	Fill in the <i>Value Brief</i>	[NAME]	[DATE]	

B. SPONSOR AND INTAKE

Done	Step	Owner	Date	Notes
☐	Sponsor agrees the pilot is worth reviewers' time, and its scope	[SPONSOR]	[DATE]	
☐	Formal request opened	[NAME]	[DATE]	Ref: [REQUEST ID]
☐	Intake confirms which reviewers are needed, and in what order	[INTAKE CONTACT]	[DATE]	

C. REVIEWS

Rows in this section can often run in parallel.

Done	Step	Reviewer	Date	Outcome
☐	Information security receives the <i>Information Security Profile, Security Questionnaire Answer Sheet</i> and <i>Architecture Overview</i>	[NAME, TEAM]	[DATE]	[OUTCOME]
☐	Information security questions answered (log them in section E)	[NAME]	[DATE]	
☐	Any request to scan or test the live apps raised with the operator first (ToS §4)	[NAME]	[DATE]	[N/A]
☐	Tier 2 with Microsoft sign-in: IT grants admin consent to the SPERT® Suite app in Entra ID, if [ORGANIZATION]'s settings require it	[NAME, IT]	[DATE]	[N/A]
☐	Privacy receives the <i>Information Security Profile</i> and <i>Data Flow Diagram</i>	[NAME, TEAM]	[DATE]	[OUTCOME]
☐	Privacy confirms the position on: no DPA offered; operator is controller; US storage; deletion by request	[NAME]	[DATE]	
☐	Enterprise architecture receives the <i>Architecture Overview, Data Flow Diagram</i> and <i>Value Brief</i>	[NAME, TEAM]	[DATE]	[OUTCOME]
☐	Tier 3 only: AI governance receives the <i>Connect AI Data Explainer</i> and <i>Data Flow Diagram</i>	[NAME, TEAM]	[DATE]	[OUTCOME]
☐	Tier 3 only: approved AI platform and account type named: [AI PLATFORM]	[NAME]	[DATE]	
☐	Tier 3 only: Read Mode decision recorded (allowed, allowed for some data, not allowed)	[NAME]	[DATE]	
☐	Tier 3 only: check whether [AI PLATFORM] lets administrators restrict custom connectors	[NAME]	[DATE]	
☐	Legal reviews the Terms of Service , Privacy Policy and (tier 3) AI Privacy Notice and Consent Notice	[NAME, TEAM]	[DATE]	[OUTCOME]
☐	Legal names who may accept the Terms for [ORGANIZATION] (ToS §5.5)	[NAME]	[DATE]	
☐	Procurement or vendor management records the no-cost supplier, if required	[NAME, TEAM]	[DATE]	[OUTCOME]

D. DECISION AND LAUNCH

Done	Step	Owner	Date	Notes
☐	Decision recorded per tier (section F)	[DECISION-MAKER]	[DATE]	
☐	Conditions of use written and shared with pilot users	[NAME]	[DATE]	
☐	Pilot users told: approved apps, tiers and data classification; export habit; one browser profile per person; disconnect Connect AI when finished	[NAME]	[DATE]	
☐	Pilot start	[NAME]	[DATE]	
☐	Review meeting held; success measures checked	[NAME]	[REVIEW DATE]	
☐	Outcome: continue / widen scope / stop. If stopping: export, clear browser data, request deletion of any cloud account (Privacy Policy §6)	[NAME]	[DATE]	

E. QUESTIONS LOG

#	Asked by	Question	Answer given (and source)	Date closed
1	[NAME]	[QUESTION]	[ANSWER, SOURCE]	[DATE]
2	[NAME]	[QUESTION]	[ANSWER, SOURCE]	[DATE]
3	[NAME]	[QUESTION]	[ANSWER, SOURCE]	[DATE]

F. DECISION RECORD

Tier	Decision	Conditions	Decided by	Date
1. Local-only use	[APPROVE / DECLINE]	[CONDITIONS]	[NAME, ROLE]	[DATE]
2. Cloud storage and sharing	[APPROVE / DECLINE / NOT IN SCOPE]	[CONDITIONS]	[NAME, ROLE]	[DATE]
3. Connect AI: Write Mode	[APPROVE / DECLINE / NOT IN SCOPE]	[CONDITIONS]	[NAME, ROLE]	[DATE]
3. Connect AI: Read Mode	[APPROVE / DECLINE / NOT IN SCOPE]	[CONDITIONS]	[NAME, ROLE]	[DATE]

Re-review triggers agreed: [RE-REVIEW TRIGGERS] (for example, a new version of any legal document, a new app offering Connect AI, a change in data location, or a scope change). **Scheduled re-review:** [DATE].

REVIEWER NOTES

- **"Why so many steps for a free tool?"** Cost is not the risk; data handling is. Tier 1 keeps the review light because no project data leaves the device; the extra rows apply only to tiers 2 and 3.
- **"Who stands behind the answers?"** The facts come from the public source code and the operator's published legal documents, cited in each kit document. No vendor attestation stands behind them, and the operator holds no certification.
- **"Can we approve part of it?"** Yes. Section F records each tier, and each Connect AI mode, separately.