



Fill-in template: data flows per tier, Connect AI snapshot contents and tools, and the organization's own controls · 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] for [REVIEWING TEAM] · **Request reference:** [REQUEST ID] · **Date:** [DATE]

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; shared backend [spert-landing](#) 2.7.2 (commit 52b7fbf), whose Connect AI tool definitions were read for the appendix; Connect AI server 1.14.1; [Privacy Policy](#) v1.4 and [AI Privacy Notice](#) v2.3 (both effective 2026-10-26). **Review date:** 2026-10-25.

This document supports an approval process. It is not legal, compliance or security advice, and it makes no commitments on the operator's behalf beyond those in the published legal documents.

For the project manager. Sections 1 to 5 describe SPERT® Suite and need no editing beyond the placeholders. Sections 6 and 7 describe [ORGANIZATION]'s side: fill them in with your service desk or [REVIEWING TEAM]. Delete the tier sections you are not requesting. The *Architecture Overview* explains each flow in more detail. Delete this box before you send it.

1. SCOPE

Item	Value
Apps in scope	[APPS REQUESTED]
Tiers in scope	[TIERS REQUESTED]
Connect AI modes in scope (tier 3)	[NONE / WRITE ONLY / WRITE AND READ]
Approved AI platform and account type (tier 3)	[AI PLATFORM]
Highest data classification	[DATA CLASSIFICATION]

2. COMPONENTS



Figure 1. SPERT® Suite components. The numbered marks on each box show the tier or tiers that use it.

Each app is a web page served by Vercel that runs in the user's browser. The optional features share one Google Firebase project: Firebase Authentication, Cloud Firestore (saved projects and the Connect AI relay) and Cloud Functions (sharing invitations, Connect AI pairing, and the Connect AI server). Invitation emails go through Resend.

3. TIER 1: LOCAL-ONLY USE (THE DEFAULT)

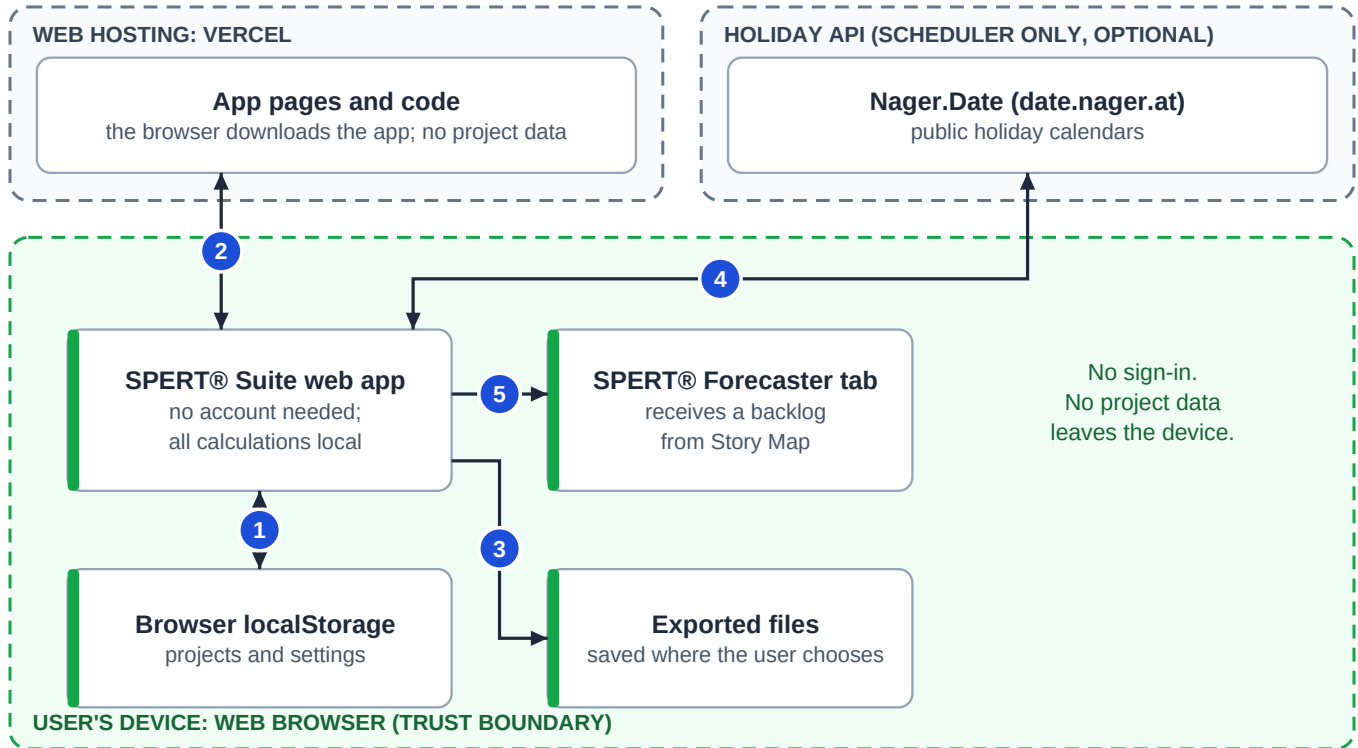


Figure 2. Tier 1 data flows. Nothing in this tier sends project data off the device.

#	From and to	What travels	When
1	App and browser storage	Projects and settings, on the device	Always
2	Vercel to browser	Pages and code; Vercel receives IP address and browser type (Privacy §1)	Every page load
3	App to the user's files	Export files	When the user exports
4	SPERT® Scheduler to Nager.Date	Country list on opening the Calendar page; country code and year when loading holidays; the service also sees the IP address (Privacy §1)	Calendar page only
5	SPERT® Story Map to a SPERT® Forecaster tab	A backlog, passed between two open browser tabs, not through a server	Only when the user sends one

4. TIER 2: CLOUD STORAGE AND SHARING

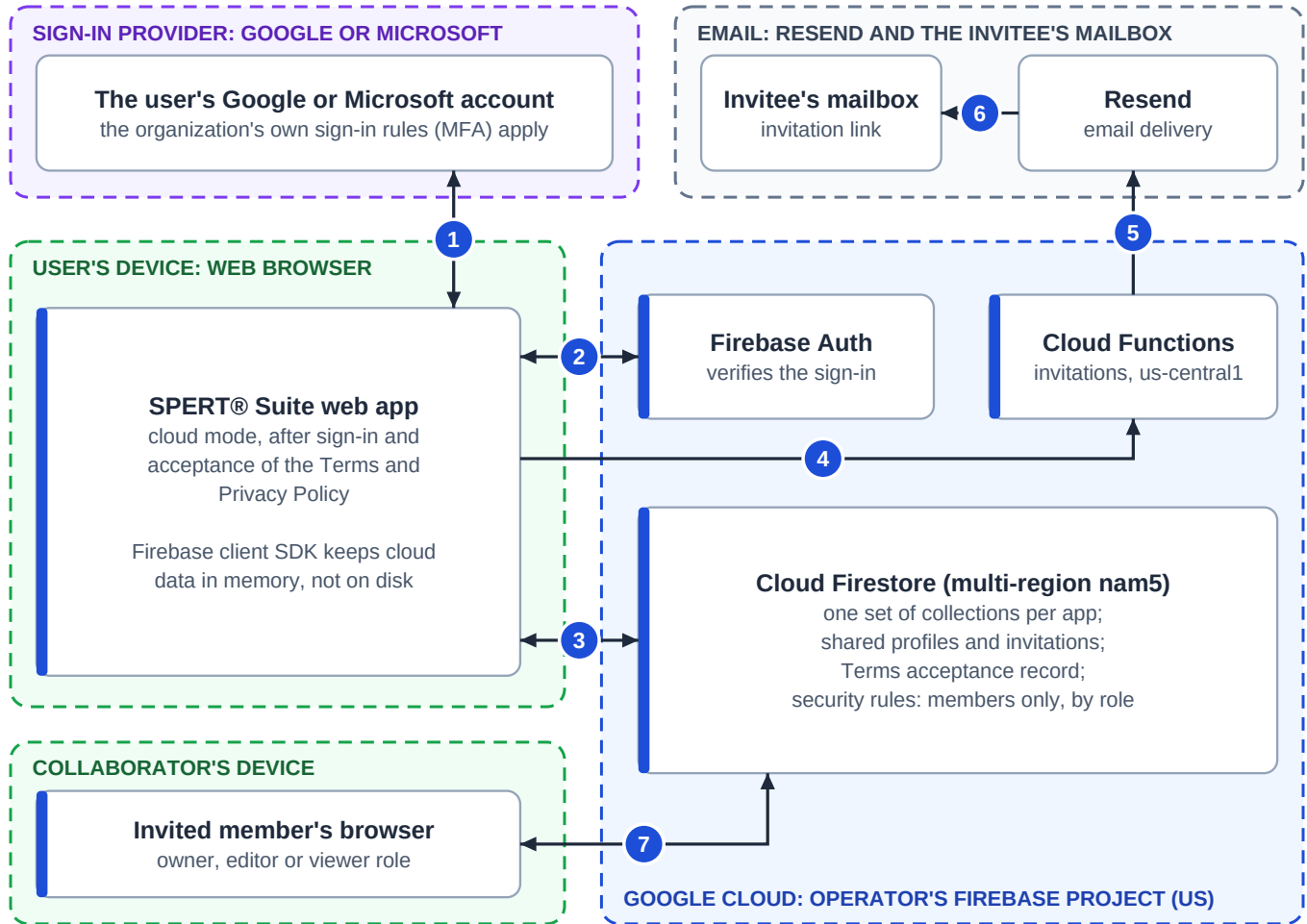


Figure 3. Tier 2 data flows. Cloud storage needs sign-in and acceptance of the Terms and [Privacy Policy](#).

#	From and to	What travels
1	Browser and the sign-in provider	Google or Microsoft sign-in, including [ORGANIZATION]'s work accounts. No password reaches SPERT® Suite
2	Browser and Firebase Authentication	The sign-in result; the operator receives name and email (Privacy §2.1)
3	Browser and Cloud Firestore (US, nam5)	Projects, settings, a shared profile (name, email) and the Terms acceptance record, checked by security rules
4	Browser to Cloud Functions (us-central1)	A sharing invitation: invitee email, role, project id and name
5	Cloud Functions to Resend	The invitation email
6	Resend to the invitee	An email with a link to the project
7	Collaborator's browser and Firestore	The shared project, within the role granted

5. TIER 3: CONNECT AI

Connect AI is offered only in SPERT® Scheduler and SPERT® Story Map (Write Mode required, Read Mode optional) and SPERT® Forecaster (Read Mode only) ([AI Privacy Notice](#) §2.3).

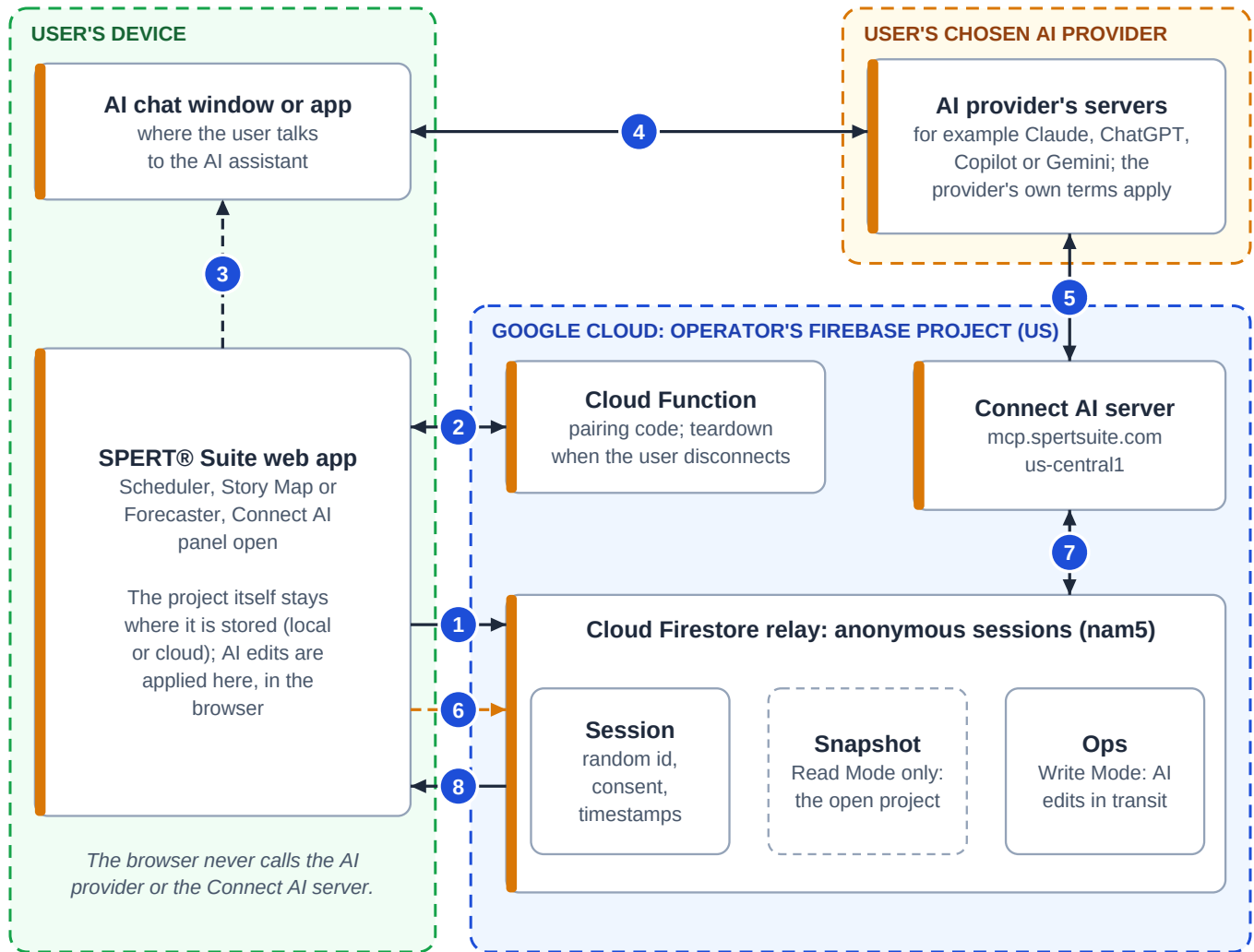


Figure 4. Tier 3 data flows. The orange dashed flow happens only when the user turns Read Mode on.

#	From and to	What travels
1	Browser to the relay (Firestore)	A session record with a random identifier, consent and activity timestamps
2	Browser and a Cloud Function	A pairing-code request (one word plus 10 digits, valid 15 minutes, single use); at the end, a teardown request
3	User, from app to AI chat	The pairing code, copied by hand
4	AI chat and the AI provider	Everything the user types, and the replies. This happens whatever SPERT® Suite's settings are
5	AI provider's servers and the Connect AI server	MCP tool calls over HTTPS to https://mcp.spertsuite.com (a Google Cloud Function in us-central1), and tool results, including the snapshot in Read Mode

#	From and to	What travels
6	Browser to the relay (Read Mode only)	A snapshot of the one open project, refreshed after edits, "regardless of your storage setting" (AI Privacy Notice §2.2)
7	Connect AI server and the relay	The server reads the snapshot (Read Mode) and writes the AI's edits (Write Mode)
8	Relay to browser	The AI's edits, applied to the open project

What a Read Mode snapshot contains

Each app builds its snapshot field by field from the open project. None includes other projects, the owner, members, sharing settings or email addresses.

App	Included	Notes
SPERT® Scheduler	Project name and id; every scenario; activity names, three-point estimates, status, computed dates and critical-path flags; milestones; dependencies; free text : activity notes, descriptions, checklist and deliverable items	Calendars and holiday data excluded. Free text is dropped first if the snapshot would exceed about 700 KB
SPERT® Story Map	Project name, id and description; the size scale; releases (name and order only); themes, backbones and ribs with names, categories, sizes and release allocations; free text : rib descriptions and notes	Release target dates excluded; recorded sprint progress appears only as a "locked" flag. Notes are dropped first if the snapshot would exceed about 900 KB
SPERT® Forecaster	Project name, unit of measure, sprint cadence and dates; up to the 60 most recent sprints (dates, completed amount, backlog); velocity and scope-change statistics; milestones (name, size, status); productivity adjustments with a free-text reason; forecast settings and percentile results	Raw simulation trials and charts excluded. Text fields are capped (names 200 characters, reasons 500)

Sources: each app's snapshot builder at the versions above (src/app/api/ai-snapshot-service.ts in SPERT® Scheduler, src/lib/aiSnapshot.ts in SPERT® Story Map, src/features/connect-ai/lib/build-snapshot.ts in SPERT® Forecaster).

Retention

The relay copy is deleted when the user disconnects or turns Read Mode off, or seven days after the session's last activity, including requests from the AI assistant; backups may keep copies up to 98 days ([AI Privacy Notice](#) §2.2, §4). Signing out ends the session on the server in all three apps (since SPERT® Scheduler 0.79.25, SPERT® Story Map 0.53.13 and SPERT® Forecaster 0.47.3); if the server cannot be reached at that moment, for example when offline, the app tells the user and keeps retrying. Disconnecting also ends the session on the server, but if the server cannot be reached, SPERT® Scheduler and SPERT® Story Map do not tell the user. Until a later attempt succeeds, the relay data stays until the session expires seven days after the session's last activity, including requests from the AI assistant; because each AI request extends the session, one that an AI keeps using does not expire. In SPERT® Scheduler a session is bound to the project it was opened for; in SPERT® Story Map it follows the user to whichever project is open, and the snapshot is replaced ([AI Privacy Notice](#) §2.2), so users should disconnect before opening a project the AI should not see or change. The AI provider's own terms govern anything it received ([Privacy Policy](#) §4.5).

What the AI can change

App	Tools	Can overwrite existing content	Can delete
SPERT® Scheduler	25 (1 read, 24 write)	Yes: names, estimates, descriptions (an empty value clears one), milestones, dependency settings, checklist state, activity order	Dependency links only; can also unassign a milestone. No tool deletes an activity, milestone, scenario or project
SPERT® Story Map	21 (1 read, 20 write)	Yes: names, descriptions, categories, notes (an empty value clears one), sizes, release allocations, location in the map	No entity deletes; tools can remove release allocations
SPERT® Forecaster	3 (all read)	No	No

Each session is bound to one app, and the server refuses tool calls meant for another app. Browsers cannot write AI edits into the relay or read a snapshot back out of it (Firestore rules). The full tool list is in the appendix.

6. THE ORGANIZATION'S SIDE

Fill this in with your service desk or [REVIEWING TEAM]. It records the controls [ORGANIZATION] already has around the flows above.

Element	The organization's arrangement
User devices	[MANAGED / UNMANAGED], [DISK ENCRYPTION], [WHO MAY USE THEM]
Browsers and profiles	[APPROVED BROWSERS], [ONE PROFILE PER PERSON, YES / NO]
Network and web filtering	[PROXY OR FILTER]. Allow *.spertsuite.com, and for tier 2 the Google Firebase endpoints
Identity provider (tier 2)	[TENANT], [MFA], [CONDITIONAL ACCESS], [USER CONSENT TO THIRD-PARTY APPS, ALLOWED / BLOCKED]
Data loss prevention	[DLP CONTROLS THAT APPLY TO BROWSER STORAGE, EXPORTS OR AI CHAT]
AI platform (tier 3)	[AI PLATFORM]; account type [ACCOUNT TYPE]; custom connectors [ALLOWED / RESTRICTED / BLOCKED]
Export storage	[WHERE EXPORTED FILES MUST BE SAVED]
Acceptable-use rule	[POLICY REFERENCE]

Restricting custom connectors in [AI PLATFORM], where available, stops Connect AI. Blocking the Connect AI server (mcp.spertsuite.com) on [ORGANIZATION]'s network does not work, because the AI provider's servers call it (flow 5), not the user's device. Starting Connect AI does need the user's browser to call SPERT® Suite's pairing function (flow 2) at us-central1-spert-suite.cloudfunctions.net/generatePairingCode, so blocking that path, or that whole host (which also stops sharing invitations), may stop Connect AI from starting. This is untested, so [ORGANIZATION]'s IT team should test any block it relies on.

7. TRUST BOUNDARIES AND CONTROLS

Boundary	What crosses it	SPERT® Suite control	Organization's control
Device and Vercel	Page requests, app code	HTTPS	[CONTROL]

Boundary	What crosses it	SPERT® Suite control	Organization's control
Device and sign-in provider (tier 2)	Sign-in	Provider's sign-in only; no passwords	[MFA, CONDITIONAL ACCESS]
Device and the operator's Google Cloud (tiers 2, 3)	Cloud projects, profiles, invitations; relay records and snapshots	HTTPS; Firebase Authentication; Firestore security rules	[CONTROL]
AI provider and the Connect AI server (tier 3)	Tool calls and results, including snapshots in Read Mode	HTTPS; single-use pairing code; session identifier; rate limit	[AI PLATFORM CONNECTOR CONTROLS]
Device and AI provider (tier 3)	Everything typed into the AI chat	None: outside SPERT® Suite	[AI PLATFORM ACCOUNT CONTROLS]
Device and Nager.Date (SPERT® Scheduler, optional)	Country code and year	HTTPS; responses checked	[CONTROL]

REVIEWER NOTES

- **"Local-only has an exception."** Correct, and the legal documents say so: Connect AI Read Mode uploads the open project whatever the storage setting ([Privacy Policy](#) §1; [AI Privacy Notice](#) §2.2). If [ORGANIZATION] approves tier 1 only, Connect AI is out of scope and the exception does not arise in approved use; there is no technical switch that enforces that, so it rests on policy.
- **"Data leaving the environment."** Figures 2 to 4 show every flow. Only flows 4 and 5 in tier 1 leave the device, and neither carries project data.
- **"Audit and logging."** None of these flows produces a log [ORGANIZATION] can see. Google Cloud keeps operational request logs for 30 days for the operator only ([Privacy Policy](#) §2.3).
- **"Open source, no vendor review."** The flows here were traced in the public source at the versions listed; no independent party has verified them.
- **Scope and limits.** Not verified: live security headers, deployed logging settings, and any AI provider's handling of data.

APPENDIX: CONNECT AI TOOLS

From the Connect AI server's tool definitions ([spert-landing](#), functions/src/mcp/tools/, at commit c54e8da). "Destructive" means the tool can overwrite or remove existing content. Two shared tools, `resolve_session_code` and `get_session_info`, change no project content.

SPERT® Forecaster (3, read-only): `forecaster_get_project` (needs Read Mode), `forecaster_explain_method`, `forecaster_get_glossary`.

SPERT® Scheduler (25):

Tool	Effect	Destructive?
<code>scheduler_get_project</code>	Read the project (Read Mode)	No
<code>scheduler_create_activity</code> , <code>scheduler_bulk_create_activities</code>	Add activities	No
<code>scheduler_create_milestone</code> , <code>scheduler_bulk_create_milestones</code>	Add milestones	No

Tool	Effect	Destructive?
scheduler_add_checklist_items, scheduler_add_deliverable_items	Add items	No
scheduler_append_activity_note, scheduler_bulk_append_notes	Append to notes	No
scheduler_create_dependency, scheduler_bulk_create_dependencies	Add dependency links (needs Read Mode)	No
scheduler_bulk_import	Add activities, milestones, assignments and links in one call	No
scheduler_assign_milestone, scheduler_bulk_assign_milestones	Assign activities to a milestone	Changes an assignment
scheduler_rename_activity	Replace an activity name	Overwrite
scheduler_update_activity_estimate	Replace an estimate, confidence and distribution	Overwrite
scheduler_set_activity_description	Replace a description; an empty value clears it	Overwrite or clear
scheduler_bulk_update_activities	Replace names, estimates and descriptions in bulk	Overwrite or clear
scheduler_update_milestone	Replace a milestone name and target date	Overwrite
scheduler_unassign_milestone	Remove an activity's milestone assignment	Remove link
scheduler_update_dependency	Replace a link's lag and type	Overwrite
scheduler_remove_dependency	Delete a dependency link	Delete
scheduler_toggle_checklist_item, scheduler_toggle_deliverable_item	Change completed state	Overwrite (state)
scheduler_reorder_activities	Reorder activities, which can move dates	Overwrite (order, dates)

SPERT® Story Map (21):

Tool	Effect	Destructive?
storymap_get_project	Read the project (Read Mode)	No
storymap_bulk_import	Add themes, backbones and ribs	No
storymap_create_theme, storymap_create_backbone, storymap_create_rib, storymap_create_release, storymap_bulk_create_releases	Add items	No
storymap_append_rib_note, storymap_bulk_append_rib_notes	Append to notes	No

Tool	Effect	Destructive?
storymap_size_rib, storymap_bulk_size	Size unsized ribs only	No
storymap_allocate_rib, storymap_bulk_allocate	Allocate a rib to a release	Changes an allocation
storymap_update_theme	Rename a theme	Overwrite
storymap_update_backbone	Replace a name or description; an empty value clears it	Overwrite or clear
storymap_update_rib	Replace a name, description, category or notes; can override or clear a size	Overwrite or clear
storymap_bulk_update_ribs	Replace descriptions, categories or notes in bulk	Overwrite or clear
storymap_unassign_rib, storymap_bulk_unassign	Remove release allocations	Remove links
storymap_move_rib, storymap_bulk_move_ribs	Move ribs to another backbone and replace their allocation	Overwrite (location, allocation)