



Planview Customer Fact Sheet, October 16, 2023

# A summary of our data privacy and security practices for Artificial Intelligence (AI) and Machine Learning (ML) insights

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This fact sheet summarizes how we protect the data used to deliver AI/ML insights through product features on the Planview platform.

## **What data is used?**

Planview utilizes application content data, such as project, activity, tasks, comments, status fields, and related metadata within Planview products in machine learning (ML) and large language models (LLM). The purpose of our use is to enhance the information about the data within the product to generate insights for our customers that will increase the value of the Planview product.

We strive to ensure that the data used for AI/ML does not include personal identifying information (PII) using techniques including:

- Fields such as IP addresses, telephone numbers, and email addresses are not included in the processed datasets.
- Fields potentially containing PII, such as comment fields, activity name fields, etc., are stripped of all PII whenever possible (e.g., @mentions and email addresses are stripped from fields through text processing scripts); and
- For AI, ML, or LLM use cases that involve processing activities at the user level (e.g., looking for staffing patterns in project teams), pseudonymization keeps names and account names safe during processing.

Questions asked through Planview AI assistants (including, but not limited to, Planview Copilot) may be retained by Planview, along with the model responses, for quality-control purposes.

## **How is this data used?**

AI, ML, and LLM processes are run within the current Planview cloud computing environments as managed services offered by our sub-processors, Microsoft Azure and Amazon Web Services (AWS), to provide model responses back to Planview applications only.

Data is neither stored, used for training, nor shared with other customers, partners, contractors, or third parties of the sub-processors. All data used by the sub-processor is immediately discarded after sending



a response to the Planview application. Sub-processors do not train or otherwise analyze request data sent from, or response data sent back to, Planview.

Planview generates cross-customer insights using aggregated, anonymized data from customers, making explicit and implicit identification of each customer involved impossible. PII data fields and fields that may contain PII data or customer intellectual property (such as comment fields) are not used in cross-customer insight analysis.

Planview analyzes customer questions asked of, and responses provided from, our AI assistants to ensure answers meet our standards for consistency and quality. We may also aggregate questions and report them within our own products so that the customer's systems administrators can review the questions being asked by their staff within the Planview platform.

### **How is data protected?**

Planview products and cloud-computing environments are subject to our SOC 2 audit and ISO 27001 and 27701 certification processes and comply with all our security-related policies and procedures. Customer data is encrypted in storage, in transit, and in backups.

Data-handling policies of sub-processors are reviewed at least annually to ensure that processing activities are compliant with our requirements. We also ensure that sub-processors do not claim ownership of model responses or retain responses for any reason.

### **Why do we employ this data?**

AI, ML, & LLM models require detailed application content data to make predictions; assess task, activity, and project risk; and to suggest plan and investment changes to improve outcomes. For accurate results, model training makes extensive use of historical customer data.

### **Can customers opt out of ML and AI data processing?**

Yes, but doing so will also remove AI and ML-driven features, such as Planview Copilot and sentiment analysis, from a customer's Planview product configuration.

If a customer chooses to opt out of cross-customer data processing, they will not be able to benefit from cross-customer-derived insights (e.g., industry benchmarks) in Planview applications. Customers will still benefit from AI and ML features that leverage within-customer application content data only. To opt-out, please submit a request in the [cross-customer consent form](#).

Customers can change their cross-customer data processing consent status at any time. A request to update status takes 30 days to process.

For more information, customers can review our complete [data handling and privacy policies here](#). If customers have additional questions about AI/ML data handling, please [email us](#).