

NAVIATE ASSISTANT DATA HANDLING OVERVIEW

Customer information on how data is handled in the current
Naviate Assistant functionality.

PURPOSE OF THIS DOCUMENT

This document provides a general overview of how data is handled in the current Naviate Assistant functionality. It is intended to support customer discussions on AI, data usage, and security. It does not replace contractual, legal, or product-specific documentation.

OVERVIEW

At Symetri, we are committed to delivering AI-enabled functionality that is transparent, secure, and aligned with customer requirements for confidentiality and responsible data handling. In the current Naviate Assistant implementation, the AI functionality is designed to help users find and summarize Naviate help content while minimizing the handling of customer data.

KEY PRINCIPLES

- AI functionality is user-initiated and processes data only when the user actively interacts with the feature.
- The current implementation includes Help, Actions, and Script Generation capabilities. Data processed depends on the feature used and the information the user provides or selects.
- The Help functionality is designed to avoid using customer project data or customer Pinnacle help data as part of standard help interactions. Actions and Script Generation may process limited user-provided or user-selected project context when required to perform the requested workflow.
- Customer data is not used to train AI models in the current implementation.
- Customers retain ownership of their input data, and AI-generated help responses are provided as support outputs based on Naviate help content and applicable Symetri terms.

1. SCOPE OF THIS INFORMATION

This document describes the current Naviate Assistant functionality as reflected in the present implementation materials. It is not intended as a blanket description of all current or future AI-powered Naviate solutions, integrations, or services. Exact implementation details may vary by product, feature, version, and customer environment, and separate documentation may apply to other AI-enabled offerings.

2. HOW THE CURRENT FUNCTIONALITY WORKS

In the current implementation, the functionality operates broadly as follows:

- The user enters a help-related prompt or question in the Naviate Assistant.
- The solution searches controlled Naviate content maintained by Symetri, such as Naviate help guides, FAQs, and certain internal workflow support material used for this purpose.

- The current implementation identifies relevant content and provides the prompt together with matching material to an Azure OpenAI-hosted foundation model.
- The returned response is designed as a summary of the relevant content and may include a link to the underlying material for validation and further reading.

For Actions and Script Generation, the functionality operates differently:

- The user enters a prompt or selects available model context through the assistant interface.
- For Actions, selected categories, parameter names, and where required parameter values may be included in the prompt to interpret and perform the requested workflow.
- For Script Generation in Naviate MEP and Fabrication, the user prompt is used to generate a PowerShell script for user review and manual use within the feature workflow.

3. WHAT DATA IS PROCESSED

The current Naviate Assistant functionality may process:

- User-provided input, such as prompts or questions entered by the user.
- Limited contextual information required to generate relevant help response.
- Controlled Naviate help content made available by Symetri for this purpose, such as help guides and FAQs.
- Minimal service-related operational data required for the functionality to operate, such as authentication, licensing, and performance monitoring data where applicable.
- For Actions (beta), the functionality may process user-provided context from the Revit model when explicitly triggered by the user, including selected categories and parameter names.
- When parameter-driven workflows are requested, parameter names and associated values may be processed to the minimum extent required to execute the requested Action or generate a response.
- User-triggered shortcuts (for example, selecting categories or parameters within the interface) result in those inputs being included in the prompt sent to the AI service for processing.

In standard use of the help functionality, the feature is designed to avoid processing customer project data as part of the help interaction itself. The current implementation is also designed so that customer Pinnacle help data is not made available to this feature.

4. HOW DATA IS USED

Data processed by the current functionality is used to:

- Interpret the user's help-related question or prompt.
- Retrieve and summarize relevant Naviate help content.
- Return a help-oriented response designed to support the user, together with links or references to the underlying help material where applicable.
- In Actions (beta), processed category, parameter names, and values are used only to interpret the user's intent and execute or suggest relevant Naviate workflows.
- For Script Generation in Naviate Fabrication Data Flow, user prompts are used to generate PowerShell scripts intended for copy-and-paste usage within the product workflow.
- Operate, secure, and monitor the service at a minimal level required for functionality.

Customer data entered into the current Naviate Assistant functionality is not used to train AI models in the current implementation. AI-generated responses should be validated with normal professional review where relevant.

5. DATA HOSTING AND PROCESSING

The current AI-related implementation is deployed in Microsoft Azure, with Sweden Central as the primary hosting region for the present setup. The current implementation uses Azure OpenAI-hosted foundation models and supports Azure-based services.

While the infrastructure and model deployment are associated with Sweden Central in the current setup, it cannot be fully guaranteed that all model processing always occurs exclusively there. Depending on the underlying Azure AI service and technical configuration, some processing may take place within the broader Azure regional environment.

6. SECURITY AND DATA PROTECTION

Naviate follows a secure-by-design approach intended to support customer requirements for confidentiality and responsible data handling. Current measures and related controls include:

- Minimal data processing is aligned with the intended functionality of the feature.
- Encrypted data transfer using HTTPS/TLS.
- Authentication and access control through mechanisms such as Auth0 and Symetri licensing controls, where applicable.

- Support for enterprise identity integration in relevant scenarios, where configured.
- Primarily desktop-based product interaction with limited cloud communication related to the AI functionality.

More broadly, Symetri Europe, including the technical division responsible for product development, is certified under ISO 27001:2022 as of March 2026. Additional product-specific security or compliance documentation may be provided separately where relevant.

7. CUSTOMER CONTROL AND RESPONSIBILITIES

Customers remain in control of how AI features are used within their organization. This includes control over:

- Whether the AI functionality is enabled and used. Organizations can disable AI functionality through installer options during deployment to align with internal policies.
- What information users choose to enter into prompts.
- How AI-generated help responses are reviewed and used in workflows.
- What internal policies or network controls are applied in sensitive environments.

For projects with strict confidentiality requirements, customers should evaluate whether internal AI policies, endpoint restrictions, or other organizational controls are needed. As with any AI-assisted functionality, users remain responsible for reviewing outputs before relying on them.

8. DATA PRIVACY, OWNERSHIP, AND OUTPUTS

Customers retain ownership of their input data. The current Naviate Assistant functionality is designed to generate outputs derived from controlled Naviate content. Use of the functionality and its outputs is subject to applicable Symetri product terms and documentation.

The current implementation is designed to limit retained data to the minimum required for operation, such as authentication, licensing, and limited operational monitoring data where relevant.

9. CONTINUOUS IMPROVEMENT

AI functionality and supporting infrastructure are continuously evaluated based on performance, quality, and cost-efficiency. As a result, implementation details, model choices, and infrastructure components may evolve over time. The current implementation has been selected with focus on delivering relevant help responses while avoiding larger or more complex solutions than needed for the present use case.

SUMMARY

- The current Naviate Assistant functionality is user-initiated and processes data only when the feature is actively used.
- The current Help implementation is designed to answer help-related questions using controlled Naviate help content, not customer project data.
- Actions may process limited user-selected Revit model context, including categories, parameter names, and where required parameter values.
- Script Generation in the Naviate MEP and Fabrication Data Flow uses user prompts to generate PowerShell scripts for user review and manual use.
- Customer Pinnacle help data is not intended to be available to the current feature.
- Customer data is not used to train AI models in the current implementation.
- The current setup is primarily hosted in Microsoft Azure with Sweden Central as the primary region for the present implementation.
- Security measures include encrypted transfer, authentication and licensing controls, and minimal data handling aligned with the intended functionality.

APPENDIX: FREQUENTLY ASKED QUESTIONS

What does the current Naviate Assistant AI feature do?

It is designed to help users find and summarize relevant Naviate help content based on the user's question and may return links to the underlying help guides for validation and further reading.

Does the current functionality process customer project data?

In standard use, the feature is designed to avoid processing customer project data as part of the help interaction itself.

Does the feature access customer Pinnacle help data?

No. The current implementation is designed so that customer Pinnacle help data is not made available to this feature.

Is my data used to train AI models?

No. Customer data entered into the current Naviate Assistant functionality is not used to train AI models in the current implementation.

Where is AI data processed?

The current setup is primarily deployed in Microsoft Azure with Sweden Central as the primary hosting region. Depending on the technical configuration of the underlying Azure AI service, some processing may occur within the broader Azure regional environment.

What type of data is processed?

The functionality processes user-entered prompts limited contextual information required to generate a response, controlled Naviate help content used for the help function, and minimal authentication, licensing, and operational monitoring data where applicable.

How is access controlled?

Access is controlled through authentication and licensing mechanisms, such as Auth0 and Symetri licensing controls, with enterprise identity integration available in relevant scenarios where configured.

Who owns the input data and AI outputs?

Customers retain ownership of their input data. The functionality generates help-oriented outputs based on controlled Naviate help content, and use is governed by applicable Symetri terms and documentation.

Can customers restrict the use of the AI feature?

Yes. Because the functionality is user-initiated, customers can govern its use through internal policies, user guidance, and network or endpoint controls where needed.

What additional data is used by Actions (beta)?

Actions may process user-selected categories, parameter names, and parameter values from the Revit model when explicitly triggered by the user to execute workflows.

Can AI features be disabled?

Yes. AI features can be disabled through installer configuration for organization-wide deployment. Naviate Zero currently does not include this installer-based option.

What does Script Generation in Data Flow do?

It generates PowerShell scripts from user prompts for use in the Naviate Fabrication Data Flow feature. These scripts are intended for manual review and execution by the user.

Should AI-generated responses be relied on without review?

No. AI-generated responses should be treated as support output and reviewed against the linked help content and normal professional judgment where relevant.

Note: This document provides a general overview for customer discussions based on the current implementation of materials available at the time of writing. For contractual, legal, compliance, or product-specific questions, separate documentation and review processes may apply.