

AI & Compliance

DireXions 2026 - Developing the Future

Agenda

How is PVX Plus using AI in Development?

Our Claude Code Setup

How to Setup Claude Code

AI Training Material

Demo(s)

Online PxPlus AI Assistant

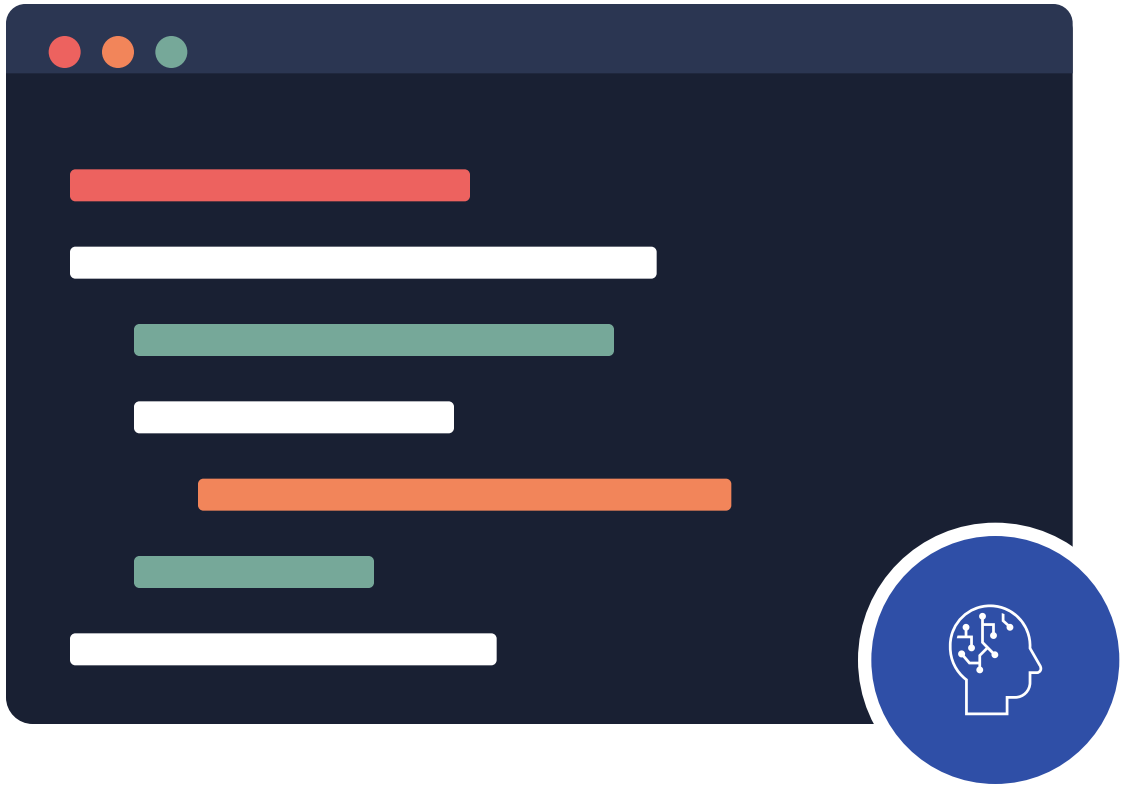
Compliance



How is PVX using AI in Development?

Main Uses

- Codebase Searching
- Debugging
- Code Review
- Documentation Assistance
- Unit Test Creation and running
- Manual test cases where automation isn't feasible
- Code Generation



How To Setup Claude Code

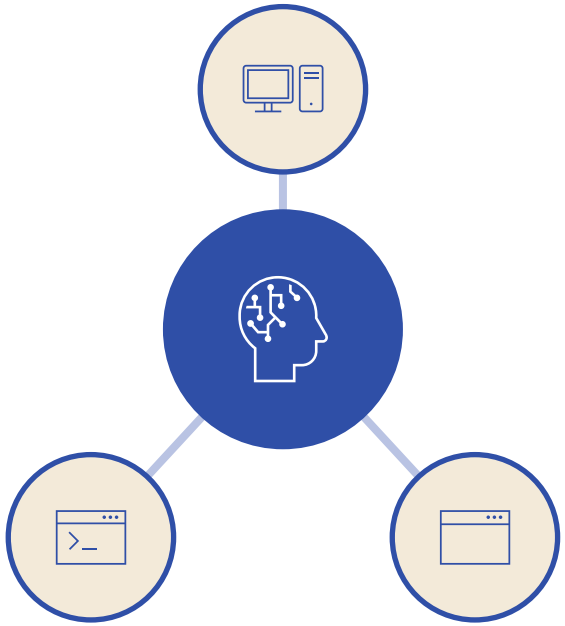
Installation Overview

- Create a business account
- Purchase Claude Seats
  - 5 Hour Rolling Window
  - Weekly Limits
- Using Claude
  - Windows Desktop Application
  - Command line Terminal
  - Web Browser

Claude Files

CLAUDE.md

- File layout and overview
- .claude Directory
  - settings.local.json
- SkillName/SKILL.md



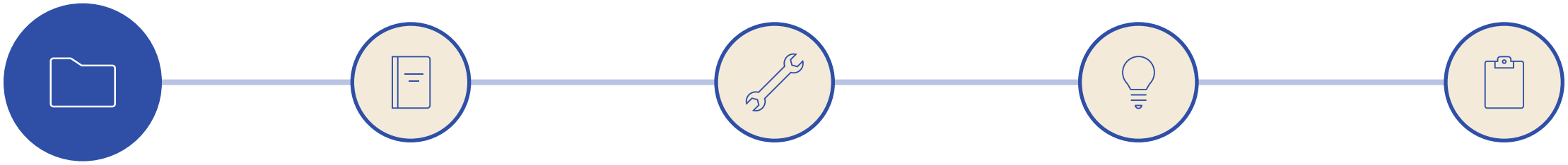
Our Claude Code Setup

.claude Directory

- Docs
- Skills
- Self-building knowledge
- Programming instructions

Paths

- paths.md is one directory above lib
- Defines path aliases for skills and other files
- No hard-coded paths, so developers can use different directory layouts



Our Claude Code Setup

Skills

- Compile programs and screen libraries
- Decompile
- Run PxPlus programs
- NOMADS Panels
- Code reviewing
- Create unit tests
- Run unit testing with plain-language

Unit Tests

- Test directories mirror the structure of our source code
- Each tested file gets a self-named directory with a test program and a log
- A base-level log summarizes every test run

We do not use any MCP (Model Context Protocol) servers as of yet, but we do plan to look at them.

Skills fulfil our current use case and are easy to maintain.

AI Training Material

What's Coming

- PxPlus Programming Instructions
- Self Building Knowledge
- Skills
- Setup Process

Where to Find It

https://pvxplus.com/downloads/AITraining/

Demos

https://pvxplus.com/downloads/misc/ClaudeCodePxPlusDemos/

SalesOps Demo

- No NOMADS or screen libraries
- One 1,800-line PxPlus program
- Written and tested by Claude
- Untouched by humans
- Built in about 2 hours

Prompt

- Fluid conversation
- Claude came up with three business specific demo ideas:
  - A data-to-report Pipeline
  - A dashboard with GUI controls
  - A REST API Client
- Combined all three into one application
- First revision was built in 46 minutes
- Used 28% of our 5-hour window

Demos

https://pvxplus.com/downloads/misc/ClaudeCodePxPlusDemos/

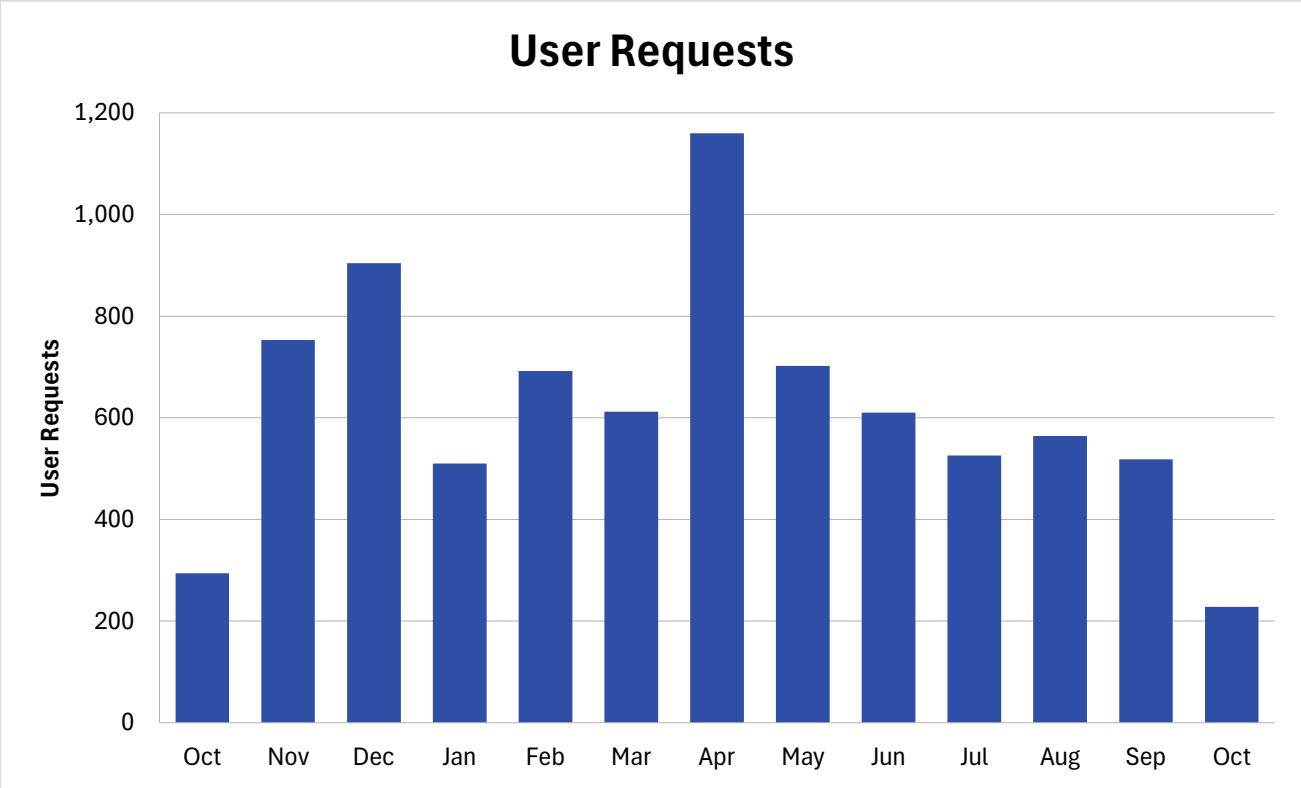
TaxScreen Demo

- Live US and Canada tax rates
- NOMADS screen library and panel
- Uses a 730-line PxPlus program
- Tax and total calculator
- Fully AI-generated

Prompt

- "Generate a PxPlus NOMADS screen that displays information about tax rates for US/Canada and pulls live tax rates via web service. You can select the province/state to display information about."
- First working revision was built in 35 minutes
- Used 29.5% of our 5-hour window

Online PxPlus AI Assistant



Updates

- Minor UI Tweaks
- Higher reasoning capabilities

Stats

- Over 8000 user requests over the past year
- Avg of 24 requests / day



Compliance

Where Does Responsibility Lie?

Your Vendor

- Owns privacy and security on its platform
- Follows their own local laws and regulations, and are responsible for upholding them

You

- Accountable for the data you share
- Liable for vendor breaches and data handling
- Vendor terms should also follow your security obligations



AI Account Types

Free Accounts

- Weaker terms than business plans
- Inputted sensitive data may be sold, processed or used for training
- No data retention limits

Business Accounts

- Ensure your plan includes terms that protect your data, and prove they meet your security obligations
- Built to meet business regulations
- Verify the terms before use



Acceptable AI Use

Approved AI Tools

- Approve a list of specific AI tools
- Only approved tools may be used for business work
- Staff may already be using unapproved AI tools before policies get put in place

Human-in-the-loop

- Keep a human in the loop for oversight and clear responsibility
- Agents offer different modes, from approving every change to auto-allowing file edits
- Review and validate AI output rather than run fully autonomous systems
- Prevents large, costly mistakes, like a deleted database and its backups

Data Security

Encryption

- Data should be encrypted sufficiently during transit
- Confirm any requirements set by regulations will be met
- In the event a vendor suffers a data breach, regulations may hold you responsible for any leaked data
- Anonymize data before sending

Access

- Use company-managed accounts for every user
- Only allow approved AI tools
- Limit what the AI can access and do, with human approval for sensitive actions

AI Security

AI Permissions

- Limit which actions an AI agent can take, such as sending emails, editing files or code
- User level permissions keep AI data access limited to file the user can access

Protect The AI Itself

- Restrict who can change the AI's prompts, permissions, and settings
- Use separate API keys for different tools and uses

Auditing

Monitor AI Activity

- Log the actions AI agents take
- Confirm your security measures and policies are working, and adjust them as needed
- Track what data and files an AI accessed, and what it did with them

Respond to Incidents

- Use logs to trace the chain of events behind an issue
- Fill any policy or security gaps the logs reveal
- Prevent similar issues from happening again









Summary

Today we've covered setting up Claude, our Claude setup here at PVX, how to get and use our AI training materials, and what it has been capable of creating.

Learning about AI policies and security gaps to look for.

Thank you



Aaron Woodhouse