

Wharton AI Tools Guide

Last Modified on 07/31/2026 10:56 am EDT

Use this page to compare generative AI tools and services available to the Wharton community, including who can use each tool, approved data use, and how to get access.

Before you use any AI tool: Use of any AI tool must follow the [Wharton AI Guidance](#), [Penn Generative AI Guidance](#), and the [Wharton Data Classification Standard](#). When in doubt, contact your [Wharton Computing strategic partner](#).

Data-risk tiers:

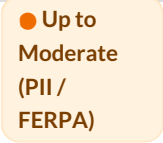
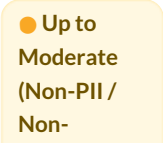
- **Low (public data)** Public data only.
- **Moderate (Non-PII / Non-FERPA)** Internal data that does not contain PII or FERPA.
- **Moderate (PII / FERPA)** May include PII and/or FERPA data.
- **High (restricted data)** Restricted data such as HIPAA, SSN, or similar.

See the [Wharton Data Classification Standard](#).

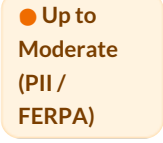
Chat & Conversational AI

Tool	Description	Approved Data Tier	Data Usage Notes	Available To
 ChatGPT Edu Access: Get access	Enterprise ChatGPT for Wharton with enhanced privacy, enterprise-level security, and University data agreements. Content entered in the Wharton ChatGPT Edu workspace is not used to train OpenAI models. Includes access to the latest ChatGPT models, workspace-shareable custom GPTs, and image creation.	● Up to Moderate (PII / FERPA)	Moderate (PII and/or FERPA) data requires Wharton ISO risk review . API access and key handling must follow Wharton's AI API Key Requirements . API access is available for faculty and staff; students need a sponsoring faculty or staff member. ChatGPT Agent is not currently enabled.	• Standing Wharton faculty • Emeritus faculty • Full-time Wharton staff • Wharton MBA, WEMBA, and PhD students • University students and TAs while enrolled in Wharton graduate courses
	Penn-managed generative	● Most	Not allowed: HIPAA	Active Penn

 PennChat (Pilot)	Description AI chat portal that provides access to multiple large language models,	High Approved Data Tier	Data Usage Notes or ePHI data, Social Security numbers, or credit card numbers.	Available To faculty, staff, and students with a PennKey.
Access: Open PennChat	including OpenAI and Anthropic Claude models, through a single customizable interface hosted in Penn's AWS environment. Intended for teaching, learning, research, and administrative work.		PennChat is currently a pilot. It is hosted within Penn's secure AWS environment, and information entered into the service is not used to train AI models. High or Moderate (PII and/or FERPA) data requires Wharton ISO risk review of the overall initiative's data architecture and flow before production. Projects connected to Wharton-managed systems classified as Moderate or High also require risk review. PennChat uses daily credit-token limits, and permanent individual balance increases are not currently supported. Fees or additional usage limits may be introduced after the pilot. Models do not search the live internet, so users must review responses for accuracy, currency, security, compliance, and appropriateness. See the PennChat Pilot FAQ.	Access requires a connection to PennNet or AirPennNet when on campus, or Penn's GlobalProtect VPN when off campus.
 Microsoft Copilot Chat (Basic)	Web-based chat agent for Microsoft's generative AI offering, including web-grounded assistance for creating text and images.	● Up to Moderate (PII / FERPA)	Personal Microsoft accounts are not protected. You must be signed in with your University account for Penn	Available at no additional charge to anyone with a PennO365 account.

Access: Learn More Tool	Description	Approved Data Tier	account for Penn protections. Data Usage Notes	Available To
 Microsoft 365 Copilot Access: Learn More	Paid Microsoft M365 Copilot license that adds AI assistance to Microsoft Office applications, including Excel, OneNote, Outlook, PowerPoint, Teams, and Word. It also includes Work search for querying across those applications and PennO365 work content. Model availability may include OpenAI and selected Anthropic models depending on Microsoft and tenant configuration.	 Up to Moderate (PII / FERPA)	Paid add-on license. Personal Microsoft accounts are not protected. Some Microsoft offerings are managed by individual schools.	Available for faculty and staff for a monthly charge; contact your Strategic Partner .
 Google Gemini Access: Learn more	Web-based interface for Google's AI models, available through Wharton Google Workspace. Gemini can process and create text, images, and audio, and can help brainstorm ideas, summarize complex topics, draft outlines, parse data, and plan work.	 Up to Moderate (Non-PII / Non-FERPA)	No PII or FERPA data.	Full-time Wharton faculty, full-time Wharton staff, and Wharton PhD students with Wharton Google Workspace accounts. Access is by request only and is not automatically granted. Contact your Strategic Partner for access.

Coding & Development

Tool	Description	Approved Data Tier	Data Usage Notes	Available To
 OpenAI API Platform Access: API key requirements	Direct API access to OpenAI models for research, custom applications, integrations, and batch inference for large asynchronous	 Up to Moderate (PII / FERPA)	No High data. Moderate (PII and/or FERPA) data requires Wharton ISO risk review of the overall initiative's data	Faculty and staff with active PennKeys whose academic or professional responsibilities

Tool	Description	Approved Data Tier	Data Usage Notes	Available To
	workloads. API use must follow Wharton's AI API Key Requirements, Penn/Wharton data policies, and any applicable DUA, contract, IRB, or other project-specific obligations.		architecture and flow before production. Projects connected to Wharton-managed systems classified as Moderate or High also require risk review. Use must follow Wharton's AI API Key Requirements. API keys must be securely stored, never embedded in public repositories, and deactivated when no longer needed. Data generated or managed through the API must be stored only in University-approved cloud storage such as Penn Box, Dropbox, or OneDrive. Batch-mode OpenAI API workflows are covered under this service. Report security, privacy, or misuse concerns to security@wharton.upenn.edu.	require API access. Students need a sponsoring faculty or staff member who funds the work and accepts responsibility for the risk.
 ChatGPT Codex Local Access: Request access	Local code-focused agent access through ChatGPT Codex in the CLI, IDE extension, or app. Features can support code editing, debugging, Git workflows, and terminal-based task execution in a user's local development environment.	● Up to Moderate (Non-PII / Non-FERPA)	Code only. No secrets, passwords, API keys, PII, FERPA data, High data, sensitive institutional data, or non-code Moderate (Non-PII / Non-FERPA) data. Codex Local is powerful: it can inspect and edit code, run terminal commands, and interact with repositories in a user's	Disabled by default. To obtain access to ChatGPT Codex CLI, a user must be faculty, Wharton Computing full-time staff, or a Wharton PhD student working with faculty on approved code-only use cases. Users should

Tool	Description	Approved Data Tier	local development environment Data Usage Notes	already have a UPenn ChatGPT account and Available To
			Moderate (PII and/or FERPA) data or anything above Moderate (Non-PII / Non-FERPA) requires ISO engagement and risk review. Interconnections with other systems, DUAs/contracts, compliance obligations, or data pulled from Moderate (Non-PII / Non-FERPA) systems also require ISO engagement, including review of how data is protected in transit. Users must monitor agent actions and report information security or privacy concerns, unauthorized access, or suspicious behavior to security@wharton.upenn.edu.	must provide written documentation attesting that they will adhere to the security requirements before access is enabled. Broader distribution is still being evaluated and depends on Wharton security requirements such as training, logging, and monitoring.
 ChatGPT Codex Cloud Access: Request access	Cloud-hosted code-focused agent access through ChatGPT Codex. Codex Cloud works in OpenAI-managed sandbox environments that can inspect repositories, propose edits, run supported commands, and prepare code changes without direct access to a user's local machine.	● Up to Moderate (Non-PII / Non-FERPA)	Code only. No secrets, passwords, API keys, PII, FERPA data, High data, sensitive institutional data, or non-code Moderate (Non-PII / Non-FERPA) data. Because work runs in OpenAI-managed sandbox environments, Codex Cloud is more isolated than Codex Local for many development workflows. Tradeoffs include limited tools,	Available to Wharton users with approved ChatGPT Codex access for code-focused use cases. Contact your Strategic Partner or support@wharton.upenn.edu to confirm eligibility and access.

Tool	Description	Approved Data Tier	Data Usage Notes	Available To
			limited access to local or internal systems, and slower execution for some tasks. Users must monitor agent actions and report information security or privacy concerns, unauthorized access, or suspicious behavior to security@wharton.upenn.edu .	
 Claude Access: Request access	Local code-focused agent access through Claude Code in the CLI, IDE extension, or app. Features can support code editing, debugging, Git workflows, and terminal-based task execution in a user's local development environment.	● Up to Moderate (Non-PII / Non-FERPA)	Code only. No secrets, passwords, API keys, PII, FERPA data, High data, sensitive institutional data, or non-code Moderate (Non-PII / Non-FERPA) data. Code is powerful: it can inspect and edit code, run terminal commands, and interact with repositories in a user's local development environment. Moderate (PII and/or FERPA) data or anything above Moderate (Non-PII / Non-FERPA) requires ISO engagement and risk review . Interconnections with other systems, DUAs/contracts, compliance obligations, or data pulled from Moderate (Non-PII / Non-FERPA) systems also require ISO engagement, including review of how data is	

Tool	Description	Approved Data Tier	Data Usage Notes	Available To
			protected in transit. Users must monitor agent actions and report information security or privacy concerns, unauthorized access, or suspicious behavior to security@wharton.upenn.edu .	
 GitHub Copilot Access: GitHub at Penn	AI coding assistance from GitHub for supported IDEs, terminals, GitHub workflows, and developer tools. Copilot can suggest code, explain code, help with debugging, support code review workflows, and use repository or editor context depending on configuration.	● Up to Moderate (Non-PII / Non-FERPA)	Code only. No secrets, passwords, API keys, PII, FERPA data, High data, sensitive institutional data, or non-code Moderate (Non-PII / Non-FERPA) data. Use the ISC-managed GitHub Copilot pathway for Penn/Wharton work. Do not use personal GitHub Copilot plans for institutional code or data unless separately approved. Moderate (PII and/or FERPA) data or anything above Moderate (Non-PII / Non-FERPA) requires ISO engagement and risk review. Users must monitor tool output and report information security or privacy concerns, unauthorized access, or suspicious behavior to security@wharton.upenn.edu.	Available through ISC-managed GitHub Copilot licensing. Wharton users should contact their Strategic Partner to request access.
	Programmatic access to approved large language	● Up to Moderate	Bedrock is not approved for High	Wharton AWS account owners

 AWS Bedrock Tool Access:	Description models hosted in AWS Bedrock for research workloads, custom	(PII / FERPA) Approved Data Tier	Data Usage Notes data by the University. Bedrock Serverless model terms must be approved by University Procurement before models are made available; previously available models may be revoked if terms change. Approved model providers/resellers include Anthropic models (all), Cohere, Mistral Models, and Twelve Labs.	Available To and users with approved AWS access. AWS
Request an AWS account	applications, integrations, and batch inference. Bedrock complements the OpenAI API Platform by offering approved model providers available through AWS.			accounts identified as handling High data are not eligible for AWS Bedrock Serverless offerings.

Meetings & Collaboration

Tool	Description	Approved Data Tier	Data Usage Notes	Available To
zoom Zoom AI Companion Access: How to enable	Generative AI features in PennZoom for meeting questions, meeting summaries, smart recordings, and whiteboard content generation. Zoom AI Companion does not use meeting data, attendees, transcripts, or shared items to train AI models.	● Up to Moderate (Non-PII / Non-FERPA)	Not approved for meetings involving PII, FERPA data, HIPAA/PHI, Social Security Numbers, credit card data, non-student minors, or other High data. All AI Companion features are off by default and must be started by the meeting host or co-host. Meeting summaries start only after the host clicks Start Summary and are shared by email, which can be forwarded. Summaries, recordings, transcripts, or generated materials that contain Moderate (Non-PII / Non-FERPA) data must be stored only in approved Moderate environments such as Penn Box, Dropbox, or OneDrive.	PennZoom hosts and co-hosts can start AI Companion features when available in PennZoom. Access may change pending University negotiations with Zoom. Participants cannot start or stop these features and are notified when they are enabled.

Course & Classroom

Tool	Description	Approved Data Tier	Data Usage Notes	Available To
Lecture Recall (Faculty) Access: Pilot info	A custom GPT inside ChatGPT Edu that helps turn recorded class sessions, slide decks, and practice materials into a course-specific AI study assistant for students. Currently running as a pilot	● Up to Moderate (PII / FERPA)	No High data. Inherits ChatGPT Edu policy. Moderate (PII and/or FERPA) data requires Wharton ISO risk review.	Wharton faculty teaching an upcoming Wharton MBA or WEMBA course selected for the pilot. The Lecture Recall

Tool	Description	Approved Data Tier	Data Usage Notes	setup process requires advance notice Available To
				before course launch, access to class recordings, and TA support is recommended.
Lecture Recall (Students) Access: How to use	A course-specific generative AI study assistant inside ChatGPT Edu for revisiting, searching, and quizzing yourself on recorded class sessions, slide decks, and practice materials. Students should cross-check important answers against the linked course materials or with the teaching team.	● Up to Moderate (PII / FERPA)	No High data. Inherits ChatGPT Edu policy. Moderate (PII and/or FERPA) data requires Wharton ISO risk review .	Students enrolled in eligible pilot courses.
Harmonize AI Instructional Features Access: Contact Courseware	AI-assisted features within Harmonize discussions in Canvas. Brainstorm helps instructors create and refine discussion instructions based on their learning objectives and desired level of complexity. Rubrics generates editable focus areas and assignment-specific rubrics that can sync to Canvas. AI Student Coaching evaluates students' draft work against the instructor's rubric and identifies areas for improvement. It does not generate grades or write content for students.	● Up to Moderate (PII / FERPA)	Instructors should review and edit AI-generated discussion instructions, focus areas, and rubrics before using them. AI Student Coaching is enabled by the instructor for individual discussions and provides feedback based on the instructor's rubric. Information submitted to these AI features is not used to train AI models.	Available in Harmonize for Wharton courses using Penn Canvas. Instructors decide whether to enable the applicable features for an assignment.
Harmonize AI Accessibility Access: Contact Courseware	AI-powered accessibility features in Harmonize generate suggested alt text for images and extended audio descriptions for	● Up to Moderate (PII / FERPA)	AI-generated alt text and audio descriptions can reduce the time required to make multimedia course	Available in Harmonize for Wharton courses using Penn Canvas.

Tool	Description	Approved Data Tier	Data Usage Notes	Available To
	videos. Instructors can review and revise the generated accessibility content.		content more accessible. Instructors should review generated descriptions for accuracy, appropriate context, and relevance before publishing them. Audio descriptions for student-created content require an internal setting to be enabled; instructors should contact the Wharton Instructional Design team at courseware@wharton.upenn.edu for assistance. Information submitted to these AI features is not used to train AI models.	

Research Computing & ML Platforms

Tool	Description	Approved Data Tier	Data Usage Notes	Available To
PARCC Betty HPC + AI Cluster Access: PARCC Betty	PARCC is Penn's university-wide research computing center. Its Betty system provides centrally managed high-performance computing and AI infrastructure, including CPU and GPU resources for demanding research workloads.	● Under Review	Data classification guidance is under review. Please consult with Wharton Research Computing and ISO through the risk review process before using PARCC for institutional or sensitive data. PARCC is owned by Penn's Office of the Vice Provost for Research. Wharton access is managed by the Research Computing team, the same group that supports access to HPC3.	Penn research groups with approved PARCC access. Wharton researchers should email research-computing@wharton.upenn.edu to get started.
gRPt (Qualtrics + OpenAI) Access: Request via Research Programming	Wharton Research Programming service for adding an OpenAI-powered chat experience inside Qualtrics surveys. It provides a generic chat front end and secure backend so study participants can interact with a model during a survey, with conversation history captured as survey data.	● Up to Moderate (Non-PII / Non-FERPA)	Not approved for Moderate (PII and/or FERPA) or High data. Studies involving PII, FERPA, Moderate (PII and/or FERPA) data, or higher-risk data flows require Wharton ISO risk review and Research Programming review before production. Email research-programming@wharton.upenn.edu to get started.	Wharton faculty, Wharton PhD students, and sponsored research teams running Qualtrics-based studies. Provisioned by Research Programming.

Writing & Productivity

Tool	Description	Approved Data Tier	Data Usage Notes	Available To
 Grammarly for Education Access: Request Grammarly	AI-assisted writing assistant for grammar, spelling, punctuation, citation style formatting, tone, clarity, and style. Available as a browser extension, web service, desktop app, and mobile keyboard.	● Up to Moderate (Non-PII / Non-FERPA)	Not approved for Moderate (PII and/or FERPA) data. High data, including PII, payment card data, and HIPAA, is generally not permitted. HIPAA usage is pending additional Penn Medicine Privacy and compliance review. Wharton is maintaining license costs for eligible existing users through June 2027; new or ineligible users may need to fund accounts from their own budgets. Contact Client Support Services at computing@wharton.upenn.edu or your Strategic Partner to request access.	Wharton full-time faculty, staff, and PhDs are eligible for Wharton-subsidized accounts. Other Penn affiliates may be eligible through ISC but must provide their own budget code.

Pilots & Under Review

Tools requested by community members or undergoing evaluation. Listed here so you know they're on the radar.

Tool	Description	Approved Data Tier	Data Usage Notes	Available To
 Airtable AI Access: Contact Apps Support	Wharton Enterprise Airtable is a cloud-based, low-code/no-code platform for building custom relational database applications and workflows. Airtable AI can help write formulas, analyze feedback, generate content, and summarize data inside approved Airtable workspaces.	● Up to Moderate (Non-PII / Non-FERPA)	Not approved for Moderate (PII and/or FERPA) or High data, except for separately approved limited exceptions such as faculty photos. PII is not permissible in general at this time. Data stored in Airtable and access granted to Airtable workspaces must follow ISO disposition requirements and Privacy Office guidance.	Available only to Wharton Computing for solutions built and supported by Wharton Computing. Airtable licenses and access are not generally available to other Wharton faculty, staff, or students.

Policies, Guidance & Training

Resource	Description
Wharton AI Guidance	Wharton-specific guidance for using generative AI responsibly, including privacy, security, teaching, research, and approved-tool considerations for the Wharton audience.
Penn Generative AI Guidance	Penn's central guidance on responsible use of generative AI: transparency, accuracy, privacy, IP, HIPAA, and bias considerations. The starting point for any AI-related question at Penn.
Generative AI at Wharton	Wharton Knowledge Base landing page for generative AI articles, including approved tools, ChatGPT Edu, Copilot, Grammarly, prompting, and Lecture Recall resources.
Wharton Data Classification Standard	Wharton's canonical four-tier framework (☐ Low / ☐ Moderate (Non-PII / Non-FERPA) / ☐ Moderate (PII and/or FERPA) / ☐ High) for what AI tools can be used with which data. Required reading before submitting institutional data to any AI tool.
Wharton Policies, Standards & Guidelines	Wharton Information Security policies, standards, and guidelines, including AI API Key Requirements, risk review, data classification, security awareness, and related Penn policy links.
Wharton AI Tools Hub	Wharton Computing's directory of approved AI tools, with current access details, security guidance, and best practices. The canonical source if anything on this page looks out of date.
Penn AI Training	Two tracks of self-paced AI training from ISC: General AI Literacy for every Penn affiliate, and a Technical / Developer track for builders. Funded through the Draw Down the Lightning grant.
CETLI - Generative AI & Teaching	Penn CETLI's hub for faculty: course policies, AI-aware assessment design, syllabus language, and academic integrity guidance.

Questions?

Questions about a specific tool, or want to request a new one? Email support@wharton.upenn.edu or contact your Wharton Computing strategic partner.