

POLICY			
Policy Name	ISO Configuration Management Policy		
Policy Number	ISO-P008	Version Number	4.0
Supersedes Policy	N/A	Effective Date	9/4/2019
Last Reviewed Date	3/15/2023	Last Revised Date	4/14/2020
Policy Owner		Approved By	
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Title	CISO	Title	CTPO
Date Approved	3/15/2023	Date Approved	3/15/2023

Objective

This policy is in place to ensure the protection of the confidentiality, integrity, and availability of customer and PlanSource data.

Responsibilities

PlanSource Personnel – PlanSource Personnel are responsible for protecting the information and devices under their control, understanding and complying with PlanSource's Information Security policies, and reporting any suspicious system activity to management and Information Security.

Information Custodian – Custodians are in physical (or logical) possession of information and/or information systems. Custodians are specifically designated for different types of information.

They follow the instructions of the Information Owners and/or operate systems on behalf of the Information Owners, but also serve users authorized by the Information Owners.

Custodians define information systems architectures and provide technical consulting assistance to the Information Owners, so systems can be deployed to meet business objectives. If requested, Custodians provide reports to the Information Owners concerning system operations, information security problems, etc.

Custodians safeguard the information in their possession, including implementing access control systems to prevent inappropriate disclosure, as well as developing, documenting, and testing system contingency plans.

Information Security – The Information Security team ("InfoSec") manages the development, maintenance and enforcement of information security policies and standards, in accordance with generally accepted best practices, focusing on business and risk objectives.

Table of Contents (if applicable)

1	Configuration Management.....	Error! Bookmark not defined.
2	Patch Management	Error! Bookmark not defined.
3	Vulnerability Management.....	Error! Bookmark not defined.

Definitions

Information Processing Facilities – Any physical location or device (e.g. datacenter, back-up location, third-party processing center, laptop, personal computer, server, network device, etc.) that manages (or processes) information

assets owned or controlled by PlanSource. These facilities may be owned or operated by PlanSource, Information Users, or business partners working on behalf of PlanSource.

Information Assets – These are assets that consist primarily of databases and data files, contracts and agreements, system documentation, research information, user manuals, training material, operational and support procedures, business continuity plans, fallback arrangements, audit trails, and archived data.

Information assets also include the physical assets, services, resources, software and intangibles that support the proliferation of information within the PlanSource global enterprise.

- Software Assets: application software, system software, development tools, and utilities;
- Physical Assets: facilities, computer equipment, communications equipment, removable media, and other equipment;
- Services: computing, communications services and general utilities;
- Personnel: personal qualifications, skills and experience;
- Intangibles: the reputation and image of PlanSource.

Information System – This is any computer system or application that processes, maintains or stores information used by PlanSource to manage their global enterprise.

Related Document(s)

- Information Security Policy

Applicable Standards/Regulations/Citations/References

- ISO 27001:2013

Revision History

Date	Version Number	Updated By	Description of Update
9/4/19	1.0	TJ Hart	Initial Policy
9/19/19	2.0	TJ Hart	Updated Formatting
2/12/20	3.0	TJ Hart	Annual Policy Update Cadence Removed Governance Reference Added Security Policy reference
4/14/20	4.0	TJ Hart	New Policy format
3/15/21	4.0	TJ Hart	Annual Review and Approval
3/15/22	4.0	David Christensen	Annual Review and Approval
3/15/23	4.0	David Christensen	Annual Review and Approval