



POLICY

Policy Name	ISO Acceptable Use Policy		
Policy Number	ISO-P001	Version Number	5.0
Supersedes Policy	N/A	Effective Date	9/4/19
Last Reviewed Date	3/15/23	Last Revised Date	3/15/23
Policy Owner		Approved By	
Name	David Christensen	Name	Srinivasan Venkatramani
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	
Refer to the Information Security Policy for a comprehensive list of Definitions and Roles and Responsibilities not covered in this document.	
Table of Contents (if applicable)	
Contents	
1	Intellectual Property Rights Error! Bookmark not defined.
2	Protecting Confidential and Restricted Information..... Error! Bookmark not defined.
3	Public Representation Error! Bookmark not defined.
4	Personal Use Error! Bookmark not defined.
5	Inappropriate Use..... Error! Bookmark not defined.
6	Information Security Error! Bookmark not defined.
7	Device Security Error! Bookmark not defined.
8	Continuous Application and Device Configuration Management..... Error! Bookmark not defined.
9	Electronic Mail..... Error! Bookmark not defined.
10	Prohibited Computer Software Error! Bookmark not defined.
Definitions	
Device – Any computing system (e.g. workstation, smart phones, notebooks, laptops, tablets, hard drive, etc.) capable of accessing, storing, and/or processing PlanSource Information Assets or networks.	
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.	
<ul style="list-style-type: none">• 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.

PlanSource Personnel – employees, partners, consultants, agents, vendors, distributors and contractors who use or are granted access to PlanSource facilities or information systems.

Mobile Device – Any hand-held computing or communication device such as a smart phone, wearable computing device, and tablet or notebook that runs a mobile Operating System, including but not limited to iOS™ or Android™, and is capable of accessing a computer network without being physically tethered to the environment. All laptops, and tablets or notebooks that run the Windows™ operating system are not considered a Mobile Device for the purposes of this policy and are specifically excluded from the scope of this definition.

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
4/13/20	4.0	TJ Hart	New Policy format
3/15/21	4.0	TJ Hart	Annual Review and Approval
3/15/2022	4.0	David Christensen	Annual Review and Approval Minor format change
3/15/2023	5.0	David Gilbert	Language changes around antivirus/EDR.

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