

Sharing and Transport of Customer Data

Sharing

Sharing with other Thematic employees

- Not everyone here is allowed to / needs to access customer data. You should only share data if you are sure the recipient is allowed to receive it, and they need to

Sharing with customers

- Our customers who are authorised to see data should already have accounts in our portal with the necessary permissions. It should not be necessary to share data in any other way.
- Not all of our customers are authorised to see their own data. So we should only use the permissions set up by their admin in the portal.

Transferring

Transferring between local systems

- We prefer point to point transfer of files using Filedrop to ensure data doesn't need to be sent elsewhere

Transferring using USB

- We do NOT allow the transferring of customer data using USB. There are significant security and confidentiality risks with using a USB stick.
- If there is some necessity to do this, we need to get written permission from the customer and management approval
- Even if a client requests to use a USB drive, please suggest using our own portal for upload / download of files. Otherwise written permission is needed

Transferring using Email

- We do NOT allow the transferring of customer data using Email. Email is retained on servers outside our control and in ways we can't know
- If there is some necessity to do this, we need to get written permission from the customer and management approval
- Even if a client requests to use email, please suggest using our own portal for upload / download of files. Otherwise written permission is needed

Storage

Storing customer data

- Customer data should only be stored on your work laptop
- Your work laptop is encrypted so that if stolen client data is not recoverable without your password

Storing online / in other services

- Customer data should **never** be stored online or in services other than Thematic.
- This includes Dropbox, Google Drive or other online storage providers
- It also includes loading into Google Sheets, Tableau or other online data-processing providers

Other situations

- The general rule is that we should always be very careful with customer data, so any situation that isn't on your own computer and following normal processes should raise a question
- If in doubt, just ask. [@Nathan Holmberg](#) is responsible for this policy and for allocating permissions

Review Date	Notes
04 Dec 2017	Initial Policy
06 Jan 2020	Review

22 Dec 2020

Review