Data handling and privacy statement

Revision history

2019-05-02
First release.
2020-04-09
Added information regarding:

- Communications, data management, and storage
- Added product specific information Microsoft 365, web services, support services, Connect, and Remote

2020-07-15
Updated to bring in line with latest Premium support offering.
2020-08-10
Sub-processors (“Inty”) privacy statement update.
2020-10-23
Updated document revision conventions and labelling.
2020-11-09
Updated iBizify solution service requirements.
Other minor corrections.
2020-12-22
Update of data retention and handling descriptions.
Sub-processors update (removal of Westcoast).
Add data retention definitions.
Add definition of Secure Store service.
2024-04-26
Branding update
Update external links and references
Update infrastructure and hosting information
Update communication platform usage

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Introduction

iBizify.net Ltd ("iBizify") offers a wide range of Information Technology services that utilise a matrix of custom-built internal platforms alongside integrated, trusted third-party products that meet or exceed the high standards we define, and its customers deserve. Our clients experience the same standards that we apply to our own data and systems.

We aim to be transparent in how we handle your data – which always remains your property and in your control.

Privacy and security are constantly on the move. We review our security and data policies regularly – at least every three months to keep up with the latest standards and trends.

The aim of this document is to go above and beyond the baseline data handling standards, and to be ultimately clear about how we handle the modern world's most precious commodity – your data.

Here are just a few of the standards that a solution must meet before being approved by iBizify:

- Datacentres must be certified as ISO 27001 compliant
- All client data must be stored at least in the EU but preferably in the UK
- Any data access over the internet must be transmitted over fully encrypted channels
- Client data must be private, must remain exclusively in the client's ownership and must never be used for data mining, research or advertising
- Hosts must be clear, open and transparent about their datacentre locations, data traceability, security protocols and standards
- Solutions must be flexible to suit a variety of business needs, and be manageable by the client
- 'Software as a Service' solutions must offer an excellent user experience, both off and online, and provide hybrid solutions for cloud migration, security segregation and future-proofing
- Solutions must make the best use of existing hardware and software investments and keep capital expenditure to an absolute minimum
- Hosts must provide and maintain a documented product lifecycle

The basis of all our data handling

We will need to store your data for maintaining our business relationship and for contractual purposes (legitimate business interests). The information that you provide will not be used for marketing purposes without your explicit permission. Only the minimal amount of data needed will be stored, for a reasonable duration of time based on our activities together. All data will be stored in a secure, encrypted format and only personnel authorised due to essential business need will be granted access. Unless explicitly requested by you, or when strictly required to deliver services requested by you, iBizify will never share your data with

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any third-party aside from those supplying internal, approved business services. You have a legal right to request access (SAR; "subject access request"), amend and remove your stored personal data at any time. iBizify will always execute such requests as promptly and simply as possible and always within our legal obligations. We do not charge an administration fee for a SAR. We reserve the right to keep anonymised metadata and other non-personally identifiable data for the purposes of business continuity, training, development, etc.

Any queries or requests for information should be directed to iBizify's office whose contact details are: Tel: 01296 252 010, Email: info@ibizify.net

Communications

All our calls are recorded for training and monitoring purposes. These recordings are normally kept for 90 days. Calls and voicemails may be machine transcribed. Specific calls and transcriptions may be archived subject to our data handling policy, for specific requirements such as consultation notes or training.

We use Microsoft 365 for email and internal data management. This service employs state-of-the-art security practices that are constantly evolving. Learn more at https://www.microsoft.com/en-gb/trust-center

We regularly review our data archives to remove PI (Personal Information) and business data that is no longer required.

We make use of some common third-party communication tools such as WhatsApp for business.

How we manage your data

iBizify wholly respects the responsibility and gravity of handling its client's data. Given the nature of information technology management and services, we will inevitably have access to sensitive and confidential data – particularly when providing a fully managed support service. We take this responsibility seriously.

We will only ever access your personal or business data when it is necessary to carry out tasks you have requested and agreed to, and only ever after explicit authorisation has been gained.

Where and how is your data stored?

Most iBizify customer data are stored within Microsoft's secure cloud services (Azure and Microsoft 365), geographically residing within the UK whenever possible or at least the EU.

Some client data is temporarily retained within iBizify's Secure Store service (see below for more detail).

The remainder of the customer data is stored on iBizify's UK-based private network, and virtual servers hosted by HostingUK (an iomart company) geographically residing in Wales.

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We also make use of some common third-party IT services such as Xero accounting.

Except for Secure Store, all business data is backed up on mirrored, internal backup hardware, private external servers, and encrypted Acronis and Microsoft Azure cloud services.

More detail about how product-specific data is handled can be found below

iBizify never makes copies of any customer's business data, apart from when necessary for requested support, data migrations, or similar (see Secure Store below). No copies are ever made without explicit permission.

When customer's business data must be stored, it is always stored in an encrypted format. That encryption is at least encrypted using a long passphrase, and hardware keys, biometrics, and 2-factor authentication whenever possible.

Highly sensitive data that needs to be retained (such as passwords in the case of managed IT services), are stored in secure repositories with the same or greater standards as above.

Data retention

Where necessary we retain customer's business data for the standard durations listed below, unless a client explicitly requests otherwise. Client data is never stored for longer than is reasonably necessary.

In some cases, by prior arrangement we need to retain data for longer periods such as for long-term projects, software development, historical reference.

Where required, we may anonymise personal data to retain meta-data beyond standard retention policies or indefinitely as reasonably required to operate our business.

Where it is agreed, we can store copies of data temporarily as a backup via Secure Store (see below). In such cases, retention policies are defined on an individual basis.

Data type	Examples	Typical duration
Highly sensitive customer data	Passwords, encryption keys	Removed immediately once no longer required
Sensitive customer business data (via Secure Store)	Pre-upgrade / pre-converted databases, file and system images. Pre-migration data states. Exports of migrated mailboxes.	Six months from project completion
Sensitive customer business data stored upon request (via Secure Store)	Pre-upgrade / pre-converted databases, file and system images. Pre-migration data states. Exports of migrated mailboxes.	Defined by prior agreement
Project data that includes PI	Planning documents, diagrams, structures, consultancy notes, database	Two years from deactivation

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Personal and contact information	Contact information, related contract data, metadata, financial	Six years from deactivation
Anonymised project data	Planning documents, diagrams, structures, consultancy notes, database with PI removed	Indefinitely

Secure Store

Secure Store is a data storage service provided by iBizify. It is provided as a convenience to its clients. It is offered as an additional safeguard for customers particularly during times of transition.

The emphasis on Secure Store is in safeguarding sensitive data by offering minimal access mechanisms. However, by its nature, this data is not replicated and therefore should not be depended upon as a backup or archiving solution and nor is it intended as such.

Customers should consider Secure Store as a temporary fallback only.

- This store is not copied, backed up or otherwise replicated
- It is subject to our data handling policy
- Data retention durations are defined by prior arrangement - six months by default
- Data is locally encrypted using a long passphrase, and biometrics
- It is only accessible by authorised iBizify staff
- No remote access is available
- It is not intended or offered as a backup or archiving service
- If the service reaches capacity, the oldest data may be deleted without notice
- Data retention is not guaranteed

Microsoft 365

Within the scope of iBizify's offerings, this refers to:

- Microsoft 365 (formally Microsoft Office 365)
- Components of the above, such as OneDrive (cloud storage), Exchange Online (email), Teams, SharePoint

You should be aware that data you store within Microsoft 365 is accessible by **iBizify**, **Microsoft**, and **intY Ltd** - but only upon explicit request by you to provide the services you request.

intY Ltd is a high-tier Microsoft provider with whom iBizify partners to deliver Microsoft cloud services. Within this scope, these organisations are data processors and data sub-processors of iBizify (the data controller).

Microsoft's Privacy Statement can be found here:
https://privacy.microsoft.com/en-gb/privacystatement

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intY Ltd's privacy policy can be found here:
https://admin.cascadeportal.com/DocumentDefinition/GetFile?id=orZ0UiNWk4cRuQoEv%2FWxYQ%3D%3D

Whilst we may access your Microsoft tenancy for administrative or maintenance purposes from time to time, any access to business data itself will only ever be made with prior authorisation from you, typically for technical support you may request.

iBizify and its sub-processor's access is provided via Microsoft's *partner delegation process* using GDAP (Granular Data Access Permissions).

You can revoke our and our processor's access at any time via the "Billing accounts | Partner relationships" area of your Microsoft 365 admin portal.

All access to Microsoft 365 services is automatically audited as part of iBizify's standard security policy. Therefore, access by any of the aforementioned parties, including Microsoft themselves (such as automated updates and maintenance), will all be recorded.

Audit information is available to you via your Microsoft 365 administration portal (see "security and compliance", Search, Audit log search).

All management and access of business data via Microsoft 365 is governed by the Microsoft Customer Agreement which can be found here:
Please be sure to select "Geography: United Kingdom" and click Submit:
http://bit.ly/ibizifymsagreement

iBizify constantly reviews and updates its security policies for Microsoft 365. iBizify's policies exceed the baseline recommendations provided by Microsoft and are customised specifically for our own client's needs.

For example,

- All administrative access account must have 2-factor authentication enabled
- Full auditing is enabled
- Unnecessary access features are disabled by default

Web and internet services

All iBizify web services are hosted on iBizify's bespoke Web Platform on privately managed servers hosted by HostingUK (an iomart company) geographically residing in Wales.

All websites, services and applications produce data which is held in private databases on the same servers. These databases are not accessible from outside of iBizify's private network, aside from where private web portals have been provisioned for direct customer access.

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iBizify's web services and databases are frequently replicated to iBizify's private network and the Microsoft cloud (Azure) for backup and disaster recovery purposes. The same access policies apply to these backups.

iBizify IT management and support

iBizify offers a range of support services, from ad-hoc support, through to fully managed services. Our support system makes use of remote access tools based on trusted software from ConnectWise. We provide surveys, inventories, on-site repairs, monitoring, pre-emptive maintenance, and more. These roles naturally require gathering, handling, processing and sometimes storing sensitive business and personal data. As discussed above, iBizify takes all such data handling very seriously and applies its policies regardless of the system or source of the data.

About iBizify support software

iBizify makes use of trusted software developed by ConnectWise. You can read more about their security measures here:

https://docs.connectwise.com/ConnectWise_ScreenConnect_Documentation/Get_started/Security_guide

Data related or connected with the ConnectWise software iBizify uses, is also all bound by the security policies discussed herein.

Built upon ConnectWise Control, iBizify Connect and iBizify Remote are secured via ConnectWise's proprietary protocol AES-256 encryption algorithm. Access is always secured through passwords, two-factor authentication and / or biometrics and limited to the very minimum personnel.

We test and update our ConnectWise solutions on a weekly basis.

iBizify Connect

iBizify Connect is built upon ConnectWise Control and customised for our needs. We use Connect to provide ad-hoc remote support, as well as permanent access ("instant access") where customers have explicitly requested this.

Remote is hosted on ConnectWise servers. All access is limited to iBizify staff, and secured with strong passwords and 2-factor authentication.

Within this scope, ConnectWise are data sub-processors of iBizify (the data controller). However, ConnectWise do not have access to iBizify managed devices.

Important information about iBizify Connect

Given Connect potentially provides iBizify with access to your systems and data, it is important to understand what it is and how it works.

Typically, Connect is installed on request, and removed immediately the support session has concluded – *unless the customer explicably specifically requests otherwise*.

If the customer explicitly requests it, Connect can be installed permanently.

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Having Connect installed permanently enables:

- Remote monitoring – for example reading system logs and error messages, and information about installed updates or problematic applications
- Instant connection upon request – with no need for the user to set it up each time

Manage support includes regular remote monitoring which is done in the background with no need for input from the user.

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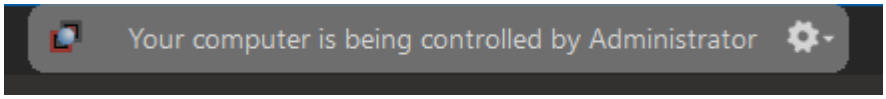
iBizify operators will never connect to your computer without explicit permission. By default, permission will be sought every time a session is required.

If you give iBizify explicit permission to connect *at any time* then we will not request permission each time. This might be granted in some scenarios, such as for the on-going maintenance of a server.

Whenever a connection is made, you will always be notified by Connect and also see a message at the top of your screen like this one:



The actual message will include the name of the iBizify staff who is connected.

It is possible for iBizify to execute commands and run tools on remote computers for the purpose of upgrades, troubleshooting or monitoring. In this case, there is no on-screen notification, however such action will only ever be done as needed and only ever with prior permission and within given agreements.

If you want to verify if Connect is installed on your device, look for the blue “iBizify orb” (illustrated here) in your Windows “System Tray” (the small icons typically in the lower-right) or your Mac Status menu (the small icons typically in the upper-right). Double-click the icon to view the connection status.

You have the right to have Connect removed from any of your devices at any time without providing a reason.

iBizify Remote

iBizify Remote uses very similar software to Connect, in that it is also built upon ConnectWise Control and customised for our needs. We use Remote to provide our customers with secure remote access to their desktops.

Remote is hosted on ConnectWise servers. All access is limited to iBizify and its customers.

Within this scope, ConnectWise are data sub-processors of iBizify (the data controller). However, ConnectWise do not have access to iBizify managed devices.

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Important information about iBizify Remote

Given Remote potentially provides iBizify with access to your systems and data, it is important to understand what it is and how it works.

Remote is permanently installed upon request, either by iBizify or its clients. With a username, password, and 2-factor authentication, this permits its clients to access their desktops securely and remotely.

Whilst desktops that have Remote installed, are accessible by iBizify – this would only be used for support purposes explicitly requested by the client, and by prior arrangement. In any case, such access is typically performed by Connect, rather than Remote.

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iBizify operators will never connect to your computer without explicit permission. By default, permission will be sought every time a session is required.

If iBizify makes such a connection, you will always be notified by Remote and also see a message at the top of your screen saying “Your computer is being controlled by Cloud Account Administrator”, like this one:

The actual message will include the name of the iBizify staff who is connected.

If a client is connected remotely, you will see a message saying “Your computer is being controlled by [name]”, like this one:

If you want to verify if Remote is installed on your device, look for the blue “iBizify orb connection” icon (illustrated here) in your Windows “System Tray” (the small icons typically in the lower-right) or your Mac Status menu (the small icons typically in the upper-right). Double-click the icon to view the connection status.

You have the right to have Remote removed from any of your devices at any time without providing a reason.

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