

# AI-Aware Browser Policy & Setup Guide

For Small Office / Home Office

## 1. Internal Browser & AI Usage Policy

**Purpose:** This policy defines how our team selects, configures, and uses web browsers and AI (artificial intelligence) copilots/agents across Mac and Windows devices. The goal is to stay productive and secure while using tools like Google Gemini, Microsoft Copilot, ChatGPT Atlas, and Perplexity Comet.

**Scope:** This applies to all employees, contractors, and assistants using company accounts or devices for work (laptops, desktops, or shared machines).

### 1. Default Browsers by Role

- Every user must have exactly one **PRIMARY** browser and optionally one **SECONDARY** browser for AI-intensive or specialist tasks.
- Primary browser is used for email, documents, shared drives, and day-to-day work. Secondary browsers are used only for clearly defined workflows.

### 2. Standard Browser Assignments

#### Founders / Management

- Mac:** Chrome as primary, ChatGPT Atlas as AI agent browser, Safari for personal and banking use.
- Windows:** Chrome or Edge as primary (chosen based on whether Google Workspace or Microsoft 365 is used more), Perplexity Comet as research browser.

#### Sales & Partnerships

- Primary:** Chrome (for Gmail, Calendar, LinkedIn, CRM, Google Docs/Sheets).
- Secondary:** Edge only if needed for Outlook / Teams / SharePoint.

#### Operations & Finance

- Primary:** Edge (for Outlook, Excel Online, Teams, SharePoint) or Chrome (for Google Sheets/Docs).
- Secondary:** Chrome or Edge (whichever is not primary) for cross-checking and testing.

#### Assistants & Analysts

- Primary:** Chrome or Edge depending on main workload.
- Secondary:** ChatGPT Atlas (Mac) or Perplexity Comet (Windows) for research, summarisation, and repetitive web workflows.

### 3. AI Usage Rules

We classify information into three levels:

#### GREEN DATA

Public websites, marketing content, published reports, public product documents. These are safe to use with AI in any approved browser.

#### YELLOW DATA

Internal documents without sensitive personal data or regulated information. Only use AI tools after removing client names, transaction details, or any confidential numbers that are not required for the question.

#### RED DATA

Banking, personal IDs, medical records, regulated information, confidential client contracts, and anything marked as "Strictly Confidential". **Red data must NEVER be sent to AI tools or exposed through AI-native browsers.**

#### Tool-Specific Rules:

- Chrome (with Gemini):** Use for summarising public pages, drafting emails, explaining formulas. Do NOT paste Red Data directly into prompts.
- Edge (with Copilot):** Use for summarising Microsoft 365 content and comparing web pages (Green/Anonymised Yellow). Do NOT use for Red Data.
- ChatGPT Atlas (Mac):** Treat as an automation agent for workflows and research. Only allow system login or Yellow Data handling with explicit approval.
- Perplexity Comet (Windows):** Use for market/tech research on public sources. Do NOT log into banking or critical systems.

### 4. Passwords and Identity

- A single password manager (such as 1Password or Bitwarden) must be used across all browsers.
- Browsers must not store sensitive passwords (such as online banking) in experimental AI browsers (Atlas, Comet, etc.).
- Multi-factor authentication (MFA) must be enabled for Google and Microsoft accounts.

### 5. Installation Discipline

- Only approved browsers may be installed: Chrome, Edge, Safari (Mac), ChatGPT Atlas (Mac), and Perplexity Comet (Windows).
- AI-specialist browsers (Arc, Brave, Opera) require admin approval.
- Quarterly review of installed browsers to remove unused tools.

### 6. Data and Compliance

- All usage must respect local data protection regulations and client confidentiality.
- If in doubt, treat it as Red Data and do not expose to AI.**

### 7. Policy Review

This policy will be reviewed every 6–12 months, or whenever major new AI-native browsers or features are adopted.

## 2. Device Setup Checklists

Use the following checklists for each new Mac or Windows device.

### 2.1 macOS Setup Checklist

- ✓ **Create or confirm user account:** Standard user account, enable FileVault encryption.
- ✓ **Install core browsers:** Chrome, ChatGPT Atlas, Safari (confirm updated). Optional: Edge.
- ✓ **Configure Google Chrome:**
  - ✓ Profile: "Business – Google"
  - ✓ Sign in: Google Workspace account
  - ✓ Sync: Bookmarks, history, passwords (if appropriate)
  - ✓ Pin: Gmail, Calendar, Drive, Docs, Sheets
  - ✓ Enable Gemini (if available)
  - ✓ Extensions: Password manager, Ad blocker, Screenshot tool, Note clipper
- ✓ **Configure Microsoft Edge (if installed):** Sign in M365, Pin core apps, Enable Copilot (Green/Yellow only).
- ✓ **Configure ChatGPT Atlas:** Sign in company account, enable sidebar, bookmark public resources.
- ✓ **Configure Safari:** Personal/Banking use only. No work logins unless required.
- ✓ **Security:** Install password manager, enable MFA on all accounts.
- ✓ **Final checks:** Test system access and research tasks. Confirm user understanding.

### 2.2 Windows Setup Checklist

- ✓ **Create or confirm user account:** Standard user account, company password policy, enable BitLocker.
- ✓ **Install core browsers:** Edge (updated), Chrome. Optional: Perplexity Comet.
- ✓ **Configure Microsoft Edge:**
  - ✓ Sign in: M365 account
  - ✓ Pin: Outlook, Teams, OneDrive, SharePoint
  - ✓ Enable Copilot
- ✓ **Configure Google Chrome:**
  - ✓ Profile: "Business – Google"
  - ✓ Sign in: Google Workspace account
  - ✓ Pin: Gmail, Calendar, Drive, Docs, Sheets
  - ✓ Extensions: Password manager, Ad blocker, Screenshot tool, Note clipper
  - ✓ Enable Gemini
- ✓ **Configure Perplexity Comet (if used):** Sign in company account, use for public research only. No banking logins.
- ✓ **Security:** Install password manager, enable MFA.
- ✓ **Final checks:** Verify tool access, test AI tools within data rules, brief user on policy.