SECURITY, PRIVACY AND COLLABORATION:
THE SHAREBASE STORY

ShareBase®
by Hyland

Organizations across the globe, from international business enterprises to local non-profits, share many of the same concerns when it comes to their sensitive content: how to keep it safe and secure, while still providing accessibility to the people who need it.

Employee information. Customer information. Private, regulated or privileged information. Keeping business critical content private is essential — but authorized employees must often share the information with other authorized users in order to perform their duties.

Tools like ShareBase, Hyland's cloud-based secure file storage, sharing and collaboration platform, enable organizations to keep their information safe while empowering users inside and outside the organization to access it where and when they need.

The following articles and success stories explore the pillars of the ShareBase story: security, privacy and collaboration.

Table of contents

1

SECURE FILE STORAGE AND SHARING, HYLAND-CLOUD STYLE

Security is a serious concern for any organization using the cloud to store and share information. Whatever the product or application, it's critical to consider the steps service providers are taking to ensure your information is safe from digital intruders.

The big 5

① Look for applications built with enterprise-level security needs in mind

There are many options when it comes to cloud-based sharing tools, but there's a clear difference in size and experience when the environment is designed specifically for corporate enterprise use. Hyland first deployed the private Hyland Cloud more than 15 years ago, and has the data centers in a continuously expanding variety of countries and regions.

Meanwhile, ShareBase was developed — a cloud-based, secure storage and sharing solution — as an electronic file sync and share (EFSS) solution to extend the power of document management outside of the office, while still maintaining the level of required visibility and control over critical corporate information. In fact, ShareBase was purpose-built with existing customers of OnBase, Hyland's enterprise information platform, in mind, so the thought process and approach to securing information is at the same high standard they've come to expect and trust.

② Your digital information is secure in transit and at rest

Security breaches happen all too often these days, but there are myriad features you can look for in a content storage and sharing tool that can prevent this from happening at your organization.

ShareBase, for example, encrypts all documents with a unique 256-bit AES key. Documents in transit are decrypted by the ShareBase web server and sent to the local user's session via SSL transmission. Moreover, there are multiple network layers separated by tiers of firewalls, three copies of backup data spread across different physical locations, as well as disaster recovery processes and delivery guarantees.

Nor is there any danger that your data will be comingled with anyone else's: every ShareBase client gets an entirely separate deployment and distinct database with a unique encryption key for all documents at rest. So even if someone could get hold of your data, there's no way to make sense of it.

1

3 Your data is physically secure

Equally important is the physical security and safety of your data. All of Hyland's data centers, for instance, are staffed and maintained continuously by security personnel. There are surveillance systems constantly monitoring the infrastructure components, and the hardware is secured inside separate cages, with certified engineers available for any maintenance issue.

Even the buildings are specifically designed to ensure equipment remains in optimum condition — think computer room air conditioning units, water and fire detection systems, raised floors, emergency power-off switches — minimizing downtime potential.

4 The service provider complies with world-class standards

When you manage your vital business information and processes in the cloud, it's important to make sure the provider is meeting the highest audit standards and has all the certifications that ensure data integrity and privacy.

Hyland's data centers are certified with globally recognized ISO 27001 standards, or local equivalents; Hyland's Global Cloud Services are successfully SOC 1 and 3 or SOC 2 audited; and Hyland, also registered with the Cloud Security Alliance, can sign HIPAA Business Associate Agreements for organizations that must meet stringent HIPAA requirements.

5 The product itself enhances security

Security concerns don't end once you install an EFFS solution; the security features of the product itself should undergo equal scrutiny. ShareBase provides safeguards for these enterprise-critical features:

File integrity: You have the visibility to see if a file has been changed since it was created or uploaded; simply follow an audit trail of who has shared, viewed and edited it.

Rights and permissions: You can organize different groups and determine the level of access and what each user can do with content (i.e., download and view vs. edit and share).

Access controls: Administrators are empowered to provision user accounts and control each user's rights; and they can transfer content when users are removed from the solution or their permissions change.

Monitor usage: ShareBase admins have visibility into what is being shared and how, and can create audit reports as necessary.

Password policies: You can easily configure password quotas, rules, lockouts and more.

Secure links: You also have the ability to apply password protection, expiration dates and watermarks with time stamps and IP addresses when sharing confidential documents through emails.

2 SHAREBASE HELPS WESTERN GOVERNORS UNIVERSITY SOLVE EMAIL PRIVACY CONCERNS

Western Governors University (WGU), an online, competency-based nonprofit university, enrolls 100,000-plus students in all 50 states — and has no physical campus. Since 2012, OnBase has been WGU's content services platform of choice, and is an integral part of the workflow for at least half of the university's employees.
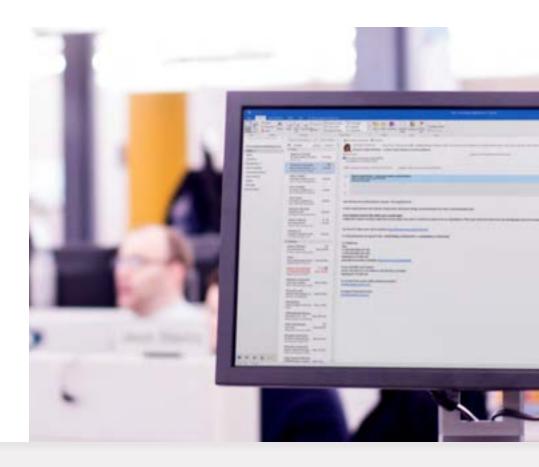
More recently, WGU adopted ShareBase, Hyland's cloud-based application for secure file sharing and storing, to eliminate reliance on email as a channel for sharing sensitive student information.

BEFORE SHAREBASE

Students in the College of Health Professions are required to complete field placements at hospitals and clinics across the country. To help manage that process, WGU employs a team of field placement representatives.

Prior to ShareBase, staff relied on email to share student data with external parties. This, of course, wasn't a secure method. In addition to privacy concerns, emails created issues with process bottlenecks. If a student emailed information to a specific staff member, and that individual was out of the office — on vacation, on leave, etc. — the documents were stuck in an email inbox.

Further complicating things were the hospitals and clinics themselves, which required information in different formats and types, depending on state requirements.

AFTER SHAREBASE

ShareBase provided an easy — and easily configurable — solution for all parties. With a few clicks, Gerri Glines — WGU's IT/OnBase senior system administrator — was able to fix the problem with a fast, user-friendly setup that allowed for time-restricted viewing and password protection.

Glines created a one-document library for the field representatives to share. She established a folder for each state, and designed a simple folder structure within each: one for each student to submit and upload files; and one for each clinic to securely share student paperwork, which could be set to expire.

While field representatives had primary control over their respective states, they were also given permission to view the workflow in colleagues' folders to provide support when necessary. This empowers staff to respond to student requests no matter who the original contact was.

Unlike other cloud-based sharing applications, we created ShareBase for enterprise use, and we built security right into the system. Therefore, when WGU received its own deployment and unique security keys, there was no need for major support from the IT department.

All told, creating the folders and providing basic training to cohorts and clinics took Glines just six hours.

THE FUTURE

Although WGU originally used ShareBase as a standalone application, the university has begun some workflow integration with OnBase to eliminate unmanaged copies and document versioning. By implementing a process where staff can view OnBase requests via ShareBase, it kicks off an approvals process that determines and controls rights and permissions for individuals both inside and outside WGU.

Given these preliminary successes, WGU is in the process of extending OnBase/ShareBase workflows to departments university-wide, including Records and Human Resources.

3 COLLABORATING INSIDE AND OUTSIDE OF THE ORGANIZATION WITH SHAREBASE

3

The advantages of deploying a secure, cloud-based file storage and sharing application like ShareBase are clear: more security and greater efficiency at a lower cost. But ShareBase also empowers users to collaborate.

Here's a breakdown of ShareBase's collaboration features:

INTERNAL FEATURES

1

Share and edit content like Word and Excel documents from within ShareBase. No need to mess with emails, and there's no need to switch between multiple platforms.

2

Comment and tag other users in the document. Every new version will be stored in the system; but you can download, delete and even promote older versions to show the most current and relevant document for your team. Shared documents are trackable and show in an activity trail.

3

If you own a folder or document, determine the number of people you want to share files with, and at what level (i.e., view-only, download, edit, share). This eliminates confusion and ensures different teams will only gain access to targeted, relevant information.

1

2

3

EXTERNAL FEATURES

Share as many links as you like to non-users. There's no additional charge for external link sharing, because the ShareBase license is based on number of users, not number of shares. Set the links to expire at a specific time or be left open indefinitely.

Enjoy quick and direct communication with recipients. There are no software downloads required for external shares, and files can be accessed on workstations, tablets and mobile devices. Recipients will be able to edit and upload any edited documents if you allow it.

Retain full control over access. Using folders, you can selectively grant permission and rights to documents and limit exposure to critical content.

Collaboration between OnBase and ShareBase

ShareBase was originally built as a file-sharing and storage solution to extend capabilities for customers of OnBase. It has since grown into a robust content collaboration platform, but it is still strongest when integrated with OnBase or Hyland's other suite of content services.

With OnBase, you can:
- Create a folder in ShareBase
- Add an OnBase document to a ShareBase folder
- Create a link to a ShareBase folder
- Delete a ShareBase folder

By using a workflow connector tool, you can kick off a process where OnBase automatically captures documents uploaded via ShareBase, eliminating the need for USB keys and FTP sites, emailing documents to individuals, and monitoring group email inboxes. Ultimately, this empowers faster collaboration with external participants within your business processes supported by OnBase.

4 DISCOVERY BENEFITS INC. USES SHAREBASE TO ELIMINATE THE HEADACHE OF EMPLOYEE EXPENSES

In the vast marketplace for cloud-based storage and sharing applications, ShareBase stands out for being designed specifically for corporate enterprise use, with features and functionality built to effectively tackle workflow problems that plague large companies.

For example, one use case that enterprises often struggle with — particularly those with a sizeable sales force — is employee expenses. Here's how Discovery Benefits Inc. (DBI), an employee benefits administration service provider and OnBase customer, used ShareBase to streamline and cure the pain of processing employee and travel expenses.

A costly, inefficient process

Before ShareBase, DBI employees followed a complicated, multi-step accounts payable process requiring eforms, approvals, notifications and receipt tracking. Getting reimbursed for travel expenses required employees to scan receipts, email them and import them into the OnBase system, and either index them by voucher number or hand them to the admin team to upload into OnBase.
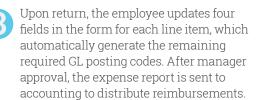
The modern expenses workflow

Following an easy ShareBase configuration — a half day to build the OnBase Workflow and a few more days for the OnBase Manager to test all scenarios, the new workflow became a simple, three-step process:

1 Before the trip, an employee places a pre-created expense form into the queue in OnBase, which automatically creates a unique folder in ShareBase for travel expenses.

2 Using a mobile device, the employee takes and uploads pictures of receipts and expenses, which are automatically named and saved straight into the folder via the ShareBase mobile app. These are automatically swept into OnBase and attached to the expense form.

3 Upon return, the employee updates four fields in the form for each line item, which automatically generate the remaining required GL posting codes. After manager approval, the expense report is sent to accounting to distribute reimbursements.

Now, DBI employees don't need to keep paper receipts, organize them or scan them into OnBase. It saves time on the administrative end as well: the ability to auto-generate codes for pay-out has cut processing time down from 20 minutes to just five. And after approvals, old folders are automatically deleted, so the system library remains uncluttered and well organized.

COLLABORATE: SECURELY AND SAFELY

It is incumbent upon organizations to provide their employees with tools that simultaneously protect critical business information while remaining easy to use to ensure adaption and continued use. Helping users work together and with authorized users outside of their organization — all in a secure and IT-approved environment — is what ShareBase does best.

For more information about ShareBase, please visit **ShareBase.com >>**

ShareBase®

by Hyland