

# Product Insight Paper



## Orchesto<sup>®</sup>-365

Making your Microsoft 365 data compliant and protected

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# Orchesto-365

GDPR and national data protection laws are preventing EU-based organizations from unrestricted use of third country cloud services. Orchesto-365 provides a solution to this and enables a compliant use of Microsoft 365 for documents.



Orchesto-365 is a pinpointed Orchesto solution for Microsoft 365 that protects your cloud data based on your own data security classification. Orchesto-365 encrypts or moves selected data according to your data management policy, and makes sure that your information cannot be shared or accessed by anyone who does not have permission for it.

- ❖ **No hassle.** Orchesto-365 is designed to provide strong support to secure sensitive data without interfering with how a user normally works with non-sensitive information in Microsoft 365. To secure data, Orchesto-365 integrates the users' Microsoft 365 environment with a trusted managed cloud service of their choice. This secure cloud, referred to as "Trusted Storage" in this document, will hold the sensitive information and is completely separate from the Microsoft environment.

- ❖ **Secure file management.** The solution includes ZebDrive - an application installed in user devices. With this application, users can access all data and are given the opportunity to place sensitive data directly in a trusted cloud service, thus bypassing Microsoft 365. Using ZebDrive secures that sensitive data is never stored or processed in a non-compliant cloud solution.
- ❖ **Data classification.** By using customers data classification, Orchesto-365 automatically performs actions such as encryption or permanent removal and transfer of data from non-compliant to compliant cloud storage, e.g. from Microsoft 365 OneDrive to a regulatory compliant cloud service.

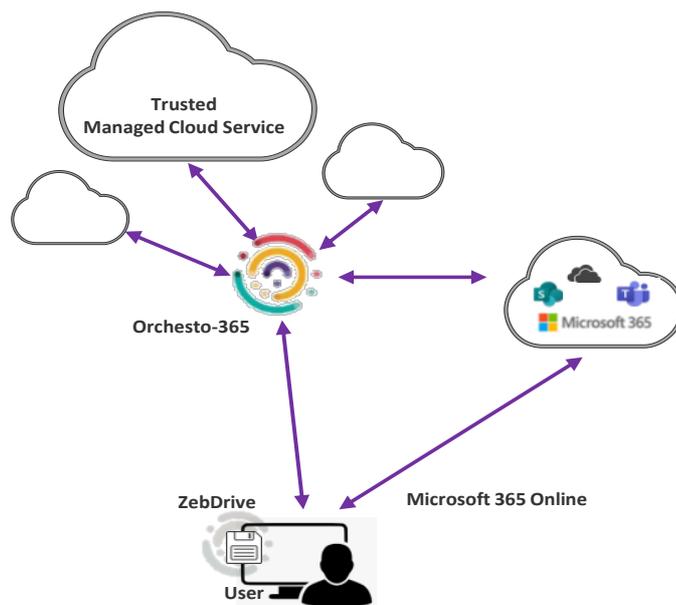


## What is Orchesto-365?

Orchesto-365 is a solution to provide protection and end-to-end control of data for Microsoft 365 deployments - securing that sensitive data is not disclosed and providing tools to enable compliance to applicable data regulations.

The Orchesto-365 solution acts as a side-companion to Microsoft 365 and is built on top of Zebware's data management platform Orchesto. It leverages powerful native Orchesto functionality to enforce customer-defined rules on data, safeguard the information in a trusted storage and to:

1. Provide near real-time integration between Orchesto-365 and Microsoft 365 to swiftly and continuously take required actions to protect sensitive data via encryption or move data to Trusted Storage outside of the Microsoft 365 environment.
2. Equip users with a ZebDrive client that allows users to safely, and via a familiar file management UI, upload, download, edit and delete files in the Trusted Storage and in Microsoft 365. The ZebDrive client runs on users' PCs and manifests itself as a local drive with full access to data in Trusted Storage and in Microsoft 365.
3. Provide continuous and transparent backup of data when content changes in Microsoft 365. (in roadmap for launch in 2021 as add-on)



### Automated Actions Based on Customer Data Management Policy

Orchesto-365 performs actions like encryption using customer encryption keys or move of Microsoft-365 data based on the customer-defined data management policy. The applicable data management policy is configured by the customer (or a selected managed solution partner) in the Orchesto software using easy-to-handle configuration tools.

The Orchesto actions defined in the policy are then triggered by document metadata in the form of:

- **Sensitivity Labels** – using the Microsoft-365 tool to classify documents
- **Document format naming** – e.g. acting on all .xls documents or adding a suffix to sensitive documents
- **Own Data Classification** – defined as triggers in document metadata

To support an easy implementation, Orchesto-365 comes with a default data classification and associated data management policy – for customers to use right away or to use as an inspiration or template for a customized implementation.

## How to use Orchesto-365 with Microsoft 365

A key feature of Orchesto-365 is the ability to take programmatic action based on the information classification, or Sensitivity Labels, of a document. By default, Orchesto-365 is configured to manage documents assigned Public, Private and Restricted Sensitivity Labels.

Orchesto-365 Data Classification	Data Policy	
	Encryption	Restricted Storage
Public	Off	Off
Private	On	Off
Restricted	Off	On

Sensitivity Labels and the associated Orchesto actions, are configurable, allowing the default configuration to be adapted to suit the specific organizational needs.

Sensitivity Labels are set by the user when working on the document. The labels will trigger actions from Orchesto-365 based on set company data policy.

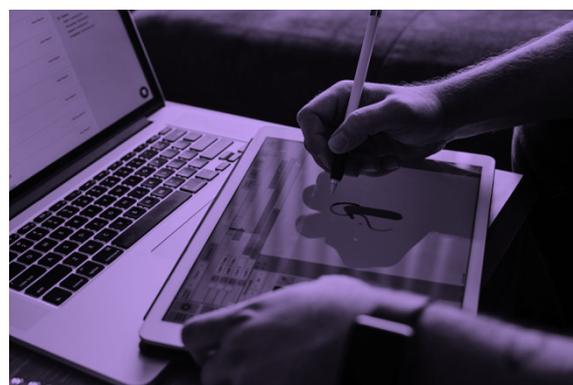
When a Sensitivity Label is added to a file it will update the meta-data of that file and trigger Orchesto-365 to take the required actions to protect documents, such as moving them to a trusted storage outside of Microsoft 365 .

Examples of actions that can be taken by Orchesto-365:

- For a *Restricted* document, the latest (i.e., labeled) version of the document as well as all previous versions of the document, irrespectively whether labeled or not, will be moved to a trusted storage outside of the Microsoft 365 environment.

- For a *Private* document, the latest (i.e. labeled) version of the document will be encrypted by Orchesto-365 and placed in the Microsoft environment. The latest (i.e., labeled) version of the document as well as all previous versions of the document, irrespectively whether labeled or not, will be moved to a trusted storage outside of the Microsoft 365 environment.
- For a *Public* document, the latest (i.e., labeled) version of the document as well as all previous versions of the document will be retained in the Microsoft 365 environment.
- For *Restricted*, *Private* and *Public* documents, the meta-data will be recorded by Orchesto-365 and available for further querying and analysis.
- For an *Unclassified* document, sans Sensitivity Labels, Orchesto-365 will NOT trigger any actions except to display and provide access to the file via ZebDrive.
- All documents, irrespectively whether labeled or not, will be visible via ZebDrive.

**Note:** The encryption is based on the high security AES-256 cipher, and the keys are exclusively held by the user and Orchesto-365. Microsoft has no information or access to these keys.



## Get started with Orchesto-365

The Microsoft 365 administrator is required to grant access for Orchesto-365 as an application to allow the integration to work. A detailed instruction on what configurations are needed, is provided in the Orchesto-365 manual



### Initial Onboarding to OneDrive

Orchesto-365 is integrated with Microsoft 365 and an administrator can either create a new reference group or use an existing group in Microsoft 365 to onboard users. All users that already exist in the group or are added later will automatically get access to Orchesto-365.

It is required that a user has provisioned OneDrive before Orchesto-365 onboarding can start. This is required since Orchesto-365 will place files in the OneDrive during the onboarding process.

- Orchesto-365 will provide a download link to a ZebDrive client. This will be placed in each Orchesto-365 user's OneDrive and allows for install of ZebDrive on Windows or Mac computers. Once launched, ZebDrive will appear as a mounted disk with view of and access to the trusted storage and the Microsoft 365 environment.

- As an alternative to individual user installation, ZebDrive clients can be installed centrally by the IT-department.
- Orchesto-365 automatically provides a per user configuration file for the ZebDrive client and the user's individual and unique access credentials. This is all that is needed for the user to get started.
- Download links to ZebDrive, the ZebDrive configuration file and the access credentials will be delivered to the user's OneDrive in a ZIP-file.



## Updating Orchesto-365 users

### Offboarding users

Orchesto-365 is designed to monitor the Microsoft 365 reference group that is used for on-boarding. To off-board a user, the user is simply removed from the group and will consequentially lose access to Orchesto-365. When user access is revoked the account is in suspended mode for 14 days. During this time period, the user can be re-on-boarded by simply re-adding the user the Orchesto-365 group. Once re-onboarded, the user can continue to work with the same setup and access credentials as before. However, if more than 14 days have passed, the access credentials will be deleted, and new Orchesto-365 credentials will be required for access.

### Onboarding to Teams and SharePoint groups

Orchesto-365 also supports secure management of files used in Teams and SharePoint groups. An Orchesto-365 user will automatically be able to leverage Orchesto-365 functionality for the groups that he or she is member of. For simplicity, the same access credentials are used to grant Orchesto-365 access to all file repositories for the user.

For each Teams group or SharePoint group that the user is a member of, the user will receive a file with the corresponding ZebDrive configuration placed in the user's OneDrive. ZebDrive access is now provided by double clicking on the ZebDrive configuration file that points to that specific Teams or SharePoint group and by entering the user's access credentials into the ZebDrive client.

## Offboarding Teams and SharePoint groups

When a user is removed from a Teams or SharePoint group, access rights to this group will immediately be revoked. Furthermore, after 14-days, the ZebDrive configuration file for the site will be removed from the customers OneDrive as a cleaning job.



### For users to get started with Orchesto-365 and ZebDrive client

Once provisioned for Orchesto-365, a user simply needs to access the ZIP-files that are created and placed in the user's OneDrive during the on-boarding process.

- A download link to the ZebDrive client for Windows or Mac. (Alternatively, ZebDrive client can be installed centrally by IT-department on each user's computer.)
- Configuration files for the ZebDrive client. Orchesto-365 provides a separate ZebDrive configuration file for the user's OneDrive and for each Teams and SharePoint group that the user is a member of.
- Access credentials used to configure the ZebDrive client to connect to Orchesto-365.

- The same Orchesto-365 access credentials is used for OneDrive and for Teams and SharePoint groups.



## Using Orchesto-365 with default data classification

Create documents in Microsoft 365 and manage versions in Microsoft 365

The user can create a document and upload it to their personal OneDrive, a Teams or a SharePoint site.

**If tagged with Sensitivity Label – *Restricted*:** To enforce secure data handling, Orchesto-365 will copy the latest and all previous versions of the file to Trusted Storage and then delete the file and previous versions from the Microsoft 365 environment. User access to the file, and previous versions, is now restricted to ZebDrive only. The information can no longer be accessed from the Microsoft 365 environment. Administrator access will be available via both ZebDrive and via the Orchesto Management Console (Web GUI). This strict handling of current and older versions is required to fully safeguard the information.

**If tagged with Sensitivity Label – *Private*:** To enforce secure data handling, Orchesto-365 will copy the latest and all previous versions of the file to Trusted Storage and following this secure the Microsoft 365 environment by encrypting the latest version of the file and by deleting all previous versions. Thus, upon completion, Microsoft will only hold a strongly encrypted copy of the file. User access to the file in clear text, and to previous versions, is now restricted to ZebDrive only. The information can be seen to exist and shared in the Microsoft 365 environment but is no longer directly accessible in clear.

**If tagged with Sensitivity Label – *Public*:** Orchesto-365 keeps track of the file and file structure in Microsoft 365. This allows for ZebDrive to display the full set of files that is available in both Trusted Storage and in Microsoft 365.

**If *Unclassified*,** meaning lack of a Sensitivity Label associated with an Orchesto-365 rule: Visibility and access will be the same as for the Public case. Administrator access to files will be available via both ZebDrive and via the Orchesto Management Console (Web GUI).

**Note:** For confidentially labeled information, please ensure that rules are devised to remove such documents from the Microsoft environment. And ideally, these rules should never need to be exercised since ZebDrive will provide the safest mechanism to interact with confidential information.

### Store documents in ZebDrive

The user can store document directly in ZebDrive and upload it to their personal OneDrive, a Teams or a SharePoint site.

**If tagged with Sensitivity Label – *Restricted*:** Orchesto-365 will save the file and new versions of the file to Trusted Storage - outside of Microsoft 365. The user can now only access the file via ZebDrive and not via Microsoft 365.

**If tagged with Sensitivity Label – *Private*:** Orchesto-365 will store an encrypted copy of the file in Microsoft 365 and older versions of the file will be placed in Trusted Storage. The user can see the file both via Microsoft 365 and ZebDrive. User consumption of the file in clear text can however only be achieved from ZebDrive.

**If tagged with Sensitivity Label – *Public*:** Orchesto-365 will store the file in Microsoft 365 and keep track of the file name and file structure in Microsoft 365 so it is mirrored in ZebDrive client and Orchesto Management Console (Web GUI).

**If unclassified,** meaning lack of Sensitivity Label associated with an Orchesto-365 rule: Orchesto-365 will store the file in Microsoft 365 and keep track of the file name and file structure in Microsoft 365 so it is mirrored in ZebDrive client and Orchesto Management Console (Web GUI). Unclassified files could include confidential information and, if so, a Sensitivity Label and an associated security rule should be added.



## Open documents from the Microsoft 365 side

A user can work with a file tagged with the Sensitivity Label **“Public”** just like today in Microsoft 365. The co-authoring and auto-save features are available. Non-classified documents, not carrying any Sensitivity Label, will be handled as public files.

As a file carrying the Sensitivity Label **“Restricted”**, will be moved to the trusted storage and deleted from Microsoft

365. Users will not be able to find a restricted document in Microsoft 365 and need to use ZebDrive to open the document. The co-authoring and auto-save features are not available when opening a file from the ZebDrive side. Documents that has just changed Sensitivity Label to **“Restricted”** will disappear within ca 60 s from the Microsoft 365 or according to what time interval is configured.

Even though a file tagged as **“Private”** is encrypted and stored in the Microsoft 365 environment, it will only open from the ZebDrive client and the co-authoring and auto-save features are not available. In a future release of Orchesto-365, encrypted files will open from the Microsoft 365 environment by use of a one-time password.

## Open documents from the ZebDrive side

ZebDrive will present the same file structure as shown in Microsoft 365. ZebDrive also displays files stored in a trusted storage and not in Microsoft 365. Restricted files are stored in a separate folder in ZebDrive named **“Restricted”**.

When a file is opened via ZebDrive it will download a local copy of the latest version and add a file locking attribute in Microsoft 365 to prevent multiple users from working in the same file at the same time. Tracking of changes can still be used to monitor and review changes.

The auto-save functionality is disabled when a file is handled locally meaning that users will need manually save changes. Once saved, Orchesto will upload the updated version to either Microsoft 365 or to a trusted storage. The co-authoring feature is also unavailable when a file is opened locally, preventing multiple users from working in the same document at the same time. This is due to co-authoring relying on the auto-save functionality to capture changes in real-time.

## Move files and folders in Microsoft 365

New folders created in Microsoft 365 will also be created in ZebDrive by Orchesto-365. The file/folder structure presented in ZebDrive will follow any changes in Microsoft 365 within ca 60 s as standard or according to the configured polling time frequency.

## Move files and folders in ZebDrive



Orchesto-365 will update Microsoft 365 with any changes to the placement of files or folders executed in ZebDrive except for, by default, files with a "**Restricted**" Sensitivity Label tag which will not be uploaded to Microsoft 365. New folders created in ZebDrive will also be created in Microsoft 365. The file / folder structure presented in Microsoft 365 will follow any changes in ZebDrive within ca 60 s as standard or according to the configured polling time frequency.

## Delete files in Microsoft 365

Orchesto-365 identifies what files / folders are deleted in Microsoft 365 and ensure that ZebDrive and Orchesto Management Console mirror this.

## Delete files in ZebDrive

Orchesto-365 will delete files / folders in Microsoft 365 as they are deleted from the ZebDrive client. Orchesto-365 will also delete files only stored in trusted storage when this is initiated from the ZebDrive client.

## Orchesto-365 support for versioning

Microsoft 365 has support for versions of a document when it is connected to their on-line environment. This allows users to access older versions for review and restoration purposes. To enable efficient file management in Orchesto-365, ZebDrive is equipped with similar support.

Orchesto-365 Sensitivity Label rules dictate how versions will be managed between the Microsoft environment and Trusted Storage. A note, Sensitivity Label rules that effectuate deletion of older versions from the Microsoft environment will also include clean-up of documents placed in the Recycle-bin and Second Stage Recycle bin (used by administrator). Hence, "full-blown" protection will be achieved

## A New Way to Access Sensitive Data

Increased data control and protection come with a few changes in how the Microsoft 365 suite is used:

1. Files classified to be removed from the Microsoft environment and / or encrypted need to be accessed via ZebDrive.
2. Files opened via ZebDrive will for security reasons not be connected to Microsoft 365's on-line environment. As a consequence, the auto-save and co-authoring features will be disabled. Hence, manual saves ( use of the "save button") will be required by the users. Furthermore, real-time collaboration on documents will not be available. Instead, collaboration management is via check-out, using file-locking, and track-changes.
3. File locking in ZebDrive is limited to Excel, PowerPoint, and Word.
4. ZebDrive is currently not available for use on mobile devices.

## Zebware -Take ownership of your data in the cloud

We are a software company providing the tools for organizations to seize the full benefit of being truly cloud native while securing complete data sovereignty. We do this with Orchesto - our solution for hybrid cloud security and orchestration, focused on portability, performance and protection of data.

- ❖ Our vision is to be the world's leading provider of hybrid-cloud enablement software, securing our customers absolute sovereignty of their data in cloud environments.
- ❖ With our globally available, market-disrupting software, we apply a close-to-application abstraction layer to the cloud, allowing our customers full security and all benefits from being truly cloud native.

- ❖ To learn more about how Orchesto could secure your cloud data, please visit our web site <https://www.zebware.com>, email us [contact@zebware.com](mailto:contact@zebware.com) or phone us: +46 (0) 8 525 282 32



# Take ownership of your data in the cloud

