

Share Files with Confidence with An Exciting New Vera Feature



Orion implements industry-best practices to keep your data secure. One of the ways that security can lapse is when transferring an individual file from one storage method to another.

As many of our advisors already know, we've implemented a file-level encryption tool known as Vera to make sure that your data stays secure when files need to be sent back and forth. With Vera's January release, they have done away with the need for you to install their software client on your computer. You are now able to download and unsecure documents all in one step from any web browser. When you open the file in a web browser you will see a button that says either "Download" or "Unsecure and Download."

If you are new to Orion or aren't already familiar with this encryption tool, Vera is a file-level encryption tool that is storage and transit agnostic, data-centric, and policy driven.

In today's post, we'll explain the ways that Vera helps give you confidence in how the Orion system protects your clients' secure information.

Three Ways Vera Secures Your Data

Vera is a file-level encryption tool. When most companies say that their data is encrypted at rest, they are normally talking about hard drive encryption. When the hard drive itself is encrypted, any files that get placed on that drive are encrypted as well.

Vera takes a different approach. Every time a file is secured with Vera, it is just

the file that is secured. This type of file-level encryption is beneficial because it offers increased security.

In traditional hard drive encryption, when the file is copied or moved off the hard drive it is no longer encrypted. Since Vera encrypts the file itself, it doesn't matter where the file is placed or how the file is moved; it remains encrypted. In other words, Vera doesn't care if the file is sitting on your local computer, on a shared network, or out in the cloud on a service like Dropbox. It also doesn't matter if the file is moved across the network or copied to a USB thumb drive and mailed. The file remains secured.

Vera is data-centric. Rules dictate which files get secured and which ones do not and those rules can be set up to secure files based on many different attributes. Some of the attributes that can be used to secure files include where the file was originally saved, who saved the file, and when the file was created or last modified. Orion uses a combination of where files were originally saved and who saved the file to determine which files get secured by Vera.

Vera is policy-driven. Once Vera has secured a file, it then wraps a policy around the file. Policies control who can access files and what each person can do with the file. Actions like the ability to edit a file, unsecure a file, and take screen captures or screenshots are all controlled by policies. A policy can also control if and when access is automatically removed.

Why Orion Chose Vera

Orion implemented a policy-based file-level encryption for several reasons.

- Files wrapped in a policy drastically reduce the risk of information disclosure if a file containing PII is sent to an unintended recipient.
- If Orion's network is compromised and a malicious actor started to take files, files would remain secured no matter where the files goes.

We took the time to evaluate a dozen different products designed for file level encryption and chose Vera for three core reasons:

- Vera is one of the top products for ease of use from both an end user's perspective and from an administrator's perspective.
- Vera is one of the few products that supports all the major operating

systems, including Windows-based PC, Apple computer, Apple and Android mobile devices, and multi-tenant environments such as Citrix.

- Vera provides a detailed audit report that gives Orion a view on who secured files, when they were secured, who has tried to access files, and who has unsecured files.

How Advisors Can Use Vera

There are several ways you can use Vera. Here are a few of the most common.

Web browser

1. Double click on the Vera secure document
2. When the web page opens select "View Secured File"
3. Authenticate to Vera using your email address.
4. If the file has a Microsoft office password on it you will be given a button to Download the files.
5. Click download
6. Save the file to the location of your choice
7. The download should have also removed the Vera security
8. If the file does not have a Microsoft Office password you will be able to view the document in the browser. You will also have the ability to download the file.
9. Click download
10. Save the file to the location of your choice
11. The download should have also removed the Vera security

Vera Client

If you choose to install the Vera client, you can use it to open files

1. Double-click on the file and it will open in the appropriate Office program.
2. To unsecure the file:
3. Close the file
4. Right-click on the file and select "Unsecure"

We're excited about the security enhancements we can bring to you through Vera. If you have any questions about this capability, or any of

Orion's security processes used to protect your data, please contact Orion Support through Orion Social.

0042-OAS-1/24/2018