Sharing High-Risk Data

With a significant portion of UWM's personnel working remotely, faculty and staff may encounter incidents where they need to share *High-Risk* data with both UWM colleagues and external individuals in a secure way. This document outlines best practices for sharing documents while working remotely.

The objectives of this document are:
1. Outline options available for sharing documents.
2. Provide use-cases to demonstrate the ideal sharing solutions for users, based on their circumstances surrounding file sharing.

Sharing Options

When working remotely, information security is a major concern; especially when it comes to *High-Risk* data. You can find more information on UWM's data policies here: https://www.wisconsin.edu/uw-policies/uw-system-administrative-policies/information-security-data-classification-and-protection/information-security-data-protections/ Please be aware of UWM's policies on *High-Risk* data before sharing.

 Outlined below are the recommended options for file-sharing at UWM while working remotely:

SharePoint
SharePoint is a web-based collaborative platform that is integrated into Microsoft's Office 365 platform. SharePoint's primary use at UWM is document management and file-sharing. SharePoint sites can be set up with the appropriate security settings to allow sharing of *High-Risk* data with UWM personnel and, if necessary, external users. Sites containing sensitive or *High-Risk* data require multi-factor authentication and additional security controls in place to further mitigate potential data loss.

Anyone that wishes to store *High-Risk* data in a SharePoint site needs to submit a request with University IT Services (UITS). To request a SharePoint site please visit the following website: https://uwm.edu/iam/spsite-request/ . The Information Security office and other UITS teams review incoming SharePoint requests and determine the best course of action by use-case. If the request is approved, the Cloud Services and Applications (CSA) team facilitates the creation of the site for the user based on their needs.

OneDrive
OneDrive is a file storage and sharing service that is part of the Office 365 platform. It is important to note that OneDrive has the potential for exfiltration (theft) of *High-Risk* data. Individuals must be careful when sharing files and understand that recipients can potentially share the *High-Risk* data with others unless the document has strict controls on it. If someone other than the owner shares the document, the owner will receive an email notifying them of the attempt to share. The owner then has a few settings for controlling access.

Additionally, there are security-related implications. Therefore, individuals should always use OneDrive's "Share" feature when sending *High-Risk* data, as opposed to sending the document's link in the email text. Utilizing "Share" allows the owner to specify the recipients of the document, along with the security settings in place for the document. Sharing in this manner, as opposed to sharing the

document's link, provides the document owner with greater control and visibility into who has access to the document.

It is imperative that owners review the access rights for documents containing *High-Risk* data regularly. it is recommended to establish a routine for checking who has access to documents and revoking access for individuals that no longer need it. OneDrive has built-in reports to see who is accessing your documents, and there is also a built-in "Manage Access" feature where the document owner can quickly revoke or delegate access to individuals as their needs for access change.

The following is a link to UWM's best practice recommendations to keep in mind when sharing documents with OneDrive: https://uwm.edu/o365/onedrive/onedrive-security-recommendations/.

Teams
Microsoft Teams is a robust communication and collaboration suite that includes chat, video meetings, and file storage capabilities. Teams has become the primary communication and collaboration platform for UWM faculty and staff. ***It is important to note that High-Risk data is not to be shared with external users through Teams.***

uFiles and uFiles RED (uFRED)
uFiles and uFiles Red (uFRED) are document management and file sharing solutions managed and operated by UWM. The primary usage of the UFiles system is to share and store data. Faculty, research students, and staff all have access to a secure repository to store their work in a UWM controlled environment. The uFiles RED (uFRED) system was designed with the storage and management of High-Risk data in mind. While working remotely, users can only access the uFiles and uFiles RED when connected to UWM VPN. For more information on how to connect to UWM VPN please see the respective UWM Knowledge Base (KB) articles below:
- Global Protect VPN - How to connect (Windows) - https://kb.uwm.edu/89581
- Global Protect VPN - How to connect (macOS) - https://kb.uwm.edu/89582
- Global Protect VPN for macOS - Self Service Setup Instructions - https://kb.uwm.edu/83717
- Global Protect VPN for macOS - Personal Mac Setup Instructions - https://kb.uwm.edu/98823
- GlobalProtect VPN for macOS - Setup Instructions - https://kb.uwm.edu/83289
- GlobalProtect VPN for Windows - Installation Instructions https://kb.uwm.edu/83286

Note: Please be aware of UWM's policies on High-Risk data before sharing. If you have any questions, please contact the UWM information Security team for assistance. You can find more information on UWM's data policies here: https://www.wisconsin.edu/uw-policies/uw-system-administrative-policies/information-security-data-classification-and-protection/information-security-data-protections/

Use Cases: Which system should I use if...
I need to share a single document that contains High-Risk data with a small number (less than 5) of UWM personnel and/or non-UWM Personnel?
OneDrive. Please consider whether or not you want to give the recipients read-only access on the document. The following are instructions for sending documents via One Drive: https://kb.uwm.edu/42068.

I need to share a single document that contains High-Risk data with a large number (greater than 5) of UWM Personnel?

SharePoint or **uFiles**. Please refer to the following webpage for more information on how to request a **SharePoint** site: https://uwm.edu/iam/spsite-request/

I need to share a single document that contains High-Risk data with a large number (greater than 5) of non-UWM personnel?
Please contact the UWM Information Security team for the best practices pertaining to your specific use-case.

I need to create a document library that contains High-Risk data to share with UWM Personnel and/or non-UWM personnel?
SharePoint. Please refer to the following webpage for more information on how to request a **SharePoint** site: https://uwm.edu/iam/spsite-request/

I need to chat with, have an online meeting with, or collaborate on a project involving High-Risk data with UWM Personnel?
Teams. If everyone involved in this project is a member of UWM, Teams is the recommended platform for this use case.

I need to chat with, have an online meeting with, or collaborate on a project involving High-Risk data with non-UWM personnel?
You can chat and conduct meetings through **Teams**. However, if you need to collaborate on a document, it is required that you request a **SharePoint** site to for collaboration with the data. Please refer to the following webpage for more information on how to request a **SharePoint** site: https://uwm.edu/iam/spsite-request/. Additionally, if you can add an existing or new SharePoint to a Team. For more information on adding a SharePoint document library to a team please refer to the following instructions: https://support.microsoft.com/en-gb/office/add-a-sharepoint-page-or-list-to-a-channel-in-teams-131edef1-455f-4c67-a8ce-efa2ebf25f0b

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Additional Resources:
Microsoft's Internal Documentation on File Sharing using SharePoint: https://docs.microsoft.com/en-us/sharepoint/deploy-file-collaboration
OneDrive: https://docs.microsoft.com/en-us/microsoft-365/admin/setup/set-up-file-storage-and-sharing?view=o365-worldwide
UFIles: https://kb.uwm.edu/uwmhd/71656
UWM Document Storage and Collaboration Services Guidelines: https://kb.uwm.edu/50971
UWM's OneDrive for Business, Teams, SharePoint Online, and uFiles Overview: https://kb.uwm.edu/71575
UWM's Office 365 (OneDrive for Business) - Managing Files in OneDrive for Business: https://kb.uwm.edu/42051