Userlane Technology - Data Privacy & Security

This document illustrates how the Userlane technology works and outlines security and privacy measures implemented by Userlane to protect users, customers, and their data.

Version 21/08

What is Userlane?

The Userlane Digital Adoption Platform provides context-based assistance and guides users step-by-step through any browser-based software.

Userlane reduces the effort for traditional software training by enabling users to learn and access help wherever and whenever they need it most. As of June 2021, more than 200 enterprises work with Userlane to increase the adoption of software throughout their organization and make their online services more accessible.

Why do companies work with Userlane?

Employee Enablement and Software Adoption

For training internal employees in software and digital processes

- Ensure user acceptance and increase adoption speed when rolling out new software in your organization
- Optimize spend for on-site training and for creating and maintaining training materials (process guides in place of videos, manuals)
- Increase the usage of existing software, highlight process changes and promote new features
- Reduce ongoing support volume to take the pressure off your IT-Helpdesk and improve support efficiency

Customer Onboarding and Retention

For increasing user engagement of customer-facing applications and online services

- Help your customers instantly understand key features and reduce time-to-value of your software
- Increase feature adoption, promote new functionalities and improve customer satisfaction
- Increase renewal rates and prevent customer churn by keeping usage and engagement at high levels
- Automate your user onboarding and provide scalable in-app help to increase support efficiency

The Userlane Platform

User types

Userlane Manager

Manages content of Userlane. Has access to the Editor and Dashboard. Usually, there are a few Userlane Managers per app.

Userlane end-user

Consumes Userlane content like Guides and the Assistant. Has no permission to edit content. Usually, there are hundreds, thousands, or hundreds of thousands.

Userlane Player

The Userlane Player is loaded on top of the underlying application. It is used by all end-users. Its purpose is to serve content to the end-user, like the Assistant, the Guides, and the Announcements. It is loaded on top of the underlying application so that it can highlight the elements the user needs to interact with.

Userlane Editor

The Userlane Editor is an extension of the Userlane Player that is only available to Userlane Managers. It allows the Manager to record and edit Guides. Like the Userlane Player, it is loaded on top of the underlying application and can identify the HTML elements during recording.

Userlane Dashboard

The Userlane Dashboard is a control panel that is only available to Userlane Managers. It is a separate application provided by Userlane that allows content management and configuration.

Userlane Browser Extension (optional)*

The Userlane Browser Extension is a plugin for web browsers that enables the Userlane Player and Editor to load on top of any web application. It is configured by the Userlane Managers on the Dashboard so that end-users can use it without thinking about it.

* The Browser Extension is not necessary for every project. For customers with access to an application's source code, the Userlane Player can be implemented via a JavaScript Snippet. However, the underlying application often does not offer any interface to insert a JavaScript Snippet. In that case, Userlane can still be deployed via the Browser Extension.

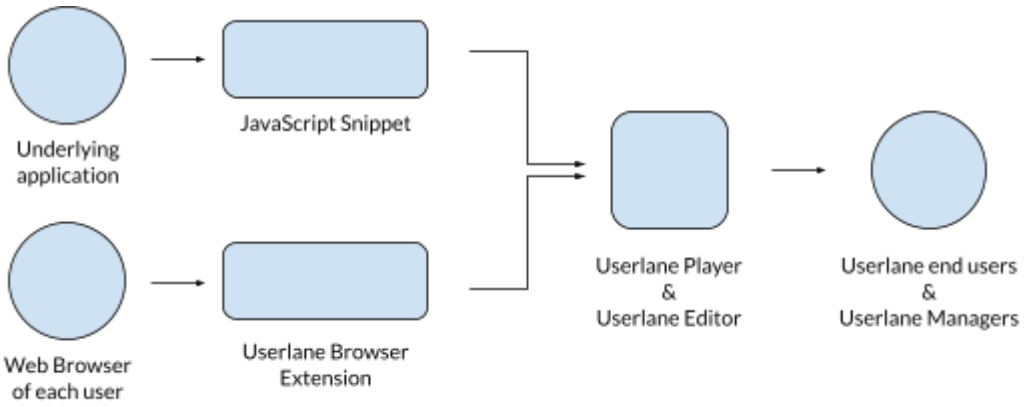
Userlane Implementation

Userlane works as an overlay that can guide users through web-based applications. Therefore, Userlane directly integrates with the underlying application (e.g., a CRM or HR software) via JavaScript. This allows the user to access contextual help without leaving the application.

Phase 1: Deployment of Userlane

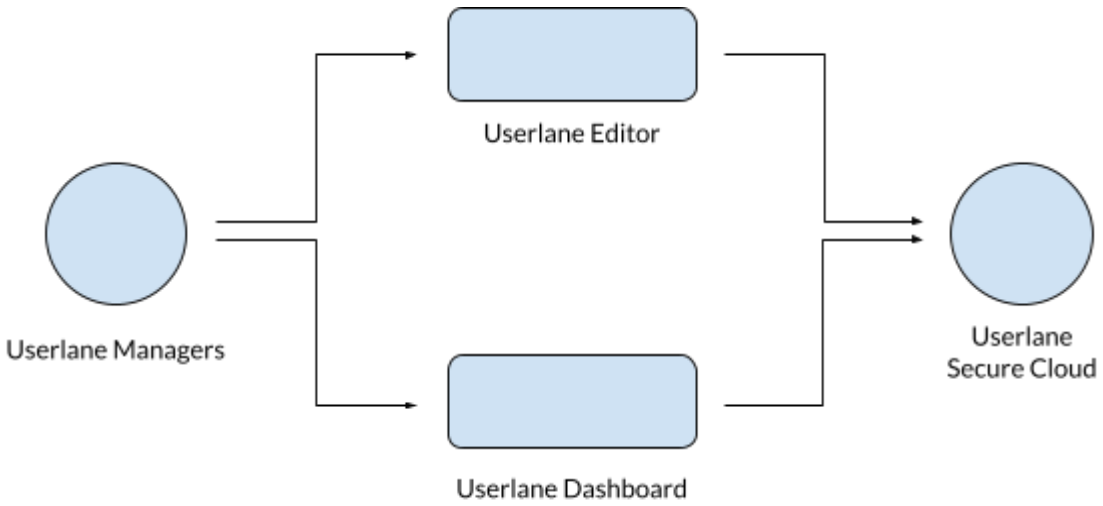
Userlane needs to be deployed in a way that allows Userlane to be loaded on top of the underlying application.

	JavaScript Snippet	Userlane Browser Extension
Integration / Installation	A JavaScript code snippet needs to be inserted into the front-end code of the underlying application. This integration happens once centrally and is then available for all users.	The Browser Extension needs to be installed into every user's browser individually. We work with our customer's IT teams to deploy the Userlane Extension automatically through Client Management Tools.
User data source	User data for segmentation and targeting must be provided through the JavaScript snippet from the underlying application.	User data for segmentation and targeting can be provided through Userlane APIs and file uploads.
Self-hosting available	Yes	No
Supported Browsers	Internet Explorer: 11 Edge: 40 and above Firefox: 60 and above Chrome: 70 and above Safari: 12 and above	Firefox: 60 and above Chrome: 70 and above Edge: 44 with Windows 10 version 1809 and above



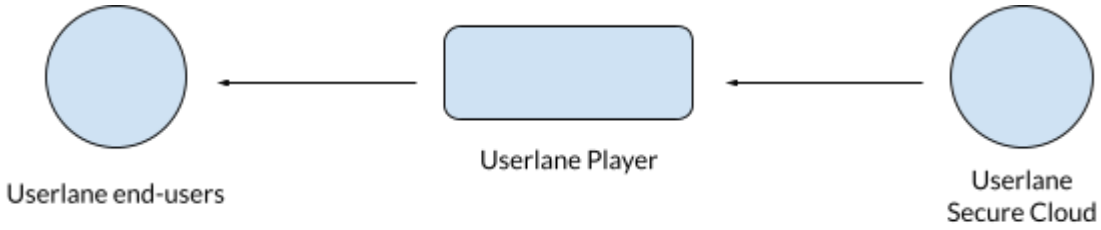
Phase 2: Content creation

After Userlane is available within the underlying application, the Userlane Managers create content using the Userlane Editor. Content, configurations, and permissions are managed within the Userlane Dashboard.
Both components require elevated privileges. These are assigned by the Account Owner on the Userlane Dashboard.



Phase 3: Content delivery

Userlane end-users now are guided, trained, and assisted by Userlane while they use the underlying application.



Data Security & Privacy Principles of Userlane

The security and integrity of all data that enters or leaves any Userlane system are of high value to us. We constantly strive to build on our high standards and leverage them to provide our clients with the peace of mind that their business is running in a secure environment. We do this by living and fostering a culture that is security-aware and privacy-aware. We built Userlane as a privacy-first company because we strongly believe that security and privacy must be a deep-rooted and upheld value of organizations worldwide. Our approach to security and privacy is built on the following three principles:

Data frugality

Userlane only stores data that is required to deliver its services. By default, we minimize the amount of data that runs through our systems. Thereby we ensure critical data is neither collected nor processed by us, unless our customers explicitly demand it for targeting, analytical or compliance purposes.

Proven technologies

We validate our technology choices with industry best practices and vendor compliance processes. We rely on languages, frameworks, and systems that are used in business-critical applications by various enterprises and governmental agencies around the world.

Highest security standards

We apply high-security standards with every change we make. We are aware that a chain is only as strong as its weakest link, so every choice matters. Our culture and values embody the high responsibility we take on.

Security & Privacy Certifications

ISO 27001 is widely recognised and respected, and provides a framework for information security management practices. It establishes requirements for information controls to manage people, processes, and technology. ISO 27001 is accepted worldwide as an assurance that proper and continual measures have been taken to protect valuable company data.

Statement of Applicability:
Development, operation and support of a digital adoption platform.

The current certificate is valid from 23rd July 2021 until 22nd July 2024 and can be viewed here. Userlane will of course renew the certificate continuously.

Userlane Partners with Microsoft for Secure Infrastructure & Hosting

Why we chose Microsoft Azure
Userlane decided to work with Microsoft Azure to ensure the strict security and compliance requirements of our enterprise and public service clients are met and allow us to provide a scalable, frictionless service at a global scale.

Userlane is a certified partner of Microsoft.
By joining forces with the industry leader Microsoft, Userlane can rely on a proven security architecture: Over 3,500 dedicated Microsoft cybersecurity professionals help protect, detect, and respond to threats.

All of Userlane's databases, application servers and network infrastructure are hosted by Microsoft Azure.
By relying on Microsoft, Userlane can leverage significant investments that have been made towards the security and compliance of data centers:

- ✓ Microsoft Azure is certified with ISO 27001 - a common standard in the industry.
- ✓ Since the beginning of 2017, Microsoft Azure is also certified with ISO 27018 - a new standard for the protection of personal data in the Cloud.
- ➢ Read Microsoft's Whitepaper about Microsoft Azure Security, Privacy, Compliance

Userlane offers dedicated hosting in the EU
In order to ensure full compliance with GDPR and the Schrems II ruling, Userlane guarantees to only use Microsoft Azure Datacenters based in the EU. Microsoft is our trusted partner in keeping customer data secure and operate in compliance with all EU regulations.

- ➢ Read Microsoft's commitment to store and process EU data only in the EU

Userlane is committed to an uptime SLA of 99.5%.
The infrastructure of Microsoft Azure is built for availability. This allows us to guarantee an availability time of 99.5%. This allows less than 4 hours of unavailability per month.
In the past, we have seen our performance surpass this minimum barrier on a regular basis.

- ➢ See Userlane's uptime statistics and realtime updates on Userlane's Statuspage

Security Operations

Encryption

Data at rest

All databases use a so-called "at rest" encryption. This means that data can only be read if proper authentication takes place on the respective database system. The files in which the data is stored are stored in encrypted form so that they can only be read by database systems that have the appropriate decryption key. Userlane strives to keep its systems up to date with the newest and most secure encryption algorithms. The standard algorithm for encrypting data at rest is currently AES256. Encryption keys are securely managed by Microsoft Azure using Key Vault.

➢ Read Azure's principles on Encryption At-Rest

Data in transit

Userlane applies transport encryption whenever data has to be transmitted over an insecure or public network (e.g. outside the virtual private cloud). The type of transport encryption depends on the encryption requested by the client system. Userlane uses HTTPS connections with 256-bit SSL certificates and TLS version 1.2 or newer for all communications with clients. This ensures that data is protected against interception or modification.

Selection of encryption algorithms

Userlane follows the NIST standards for selecting strong encryption algorithms and approving built-in encryption used by a Userlane subprocessor.

➢ Read the NIST SP 800-175B guidelines

Segregation of traffic in multi-tenant environment

Userlane's Cloud systems implement multi-tenancy in a shared cluster. Multiple customers are served from a single cluster. Tenant separation is enforced on a logical level, not on a physical level. Userlane ensures strict tenant separation through the following measures:

1. Input sanitization and pre-built queries
2. Request isolation
3. Use of frameworks
4. Extensive manual and automated testing
5. Security scans
6. Penetration testing (see below)

Firewalls

Userlane works with Azure Network Security Groups to ensure that services running within the Azure environment are accessible only to the networks that need it. Access to network ports of various services is restricted to the extent that access is only possible through services that need access.

Penetration Tests

Userlane works with recognized security experts and researchers. Together we aim for the highest possible security of our systems.
We perform penetration tests on a yearly basis. Our contractor Cobalt maintains a core of 200+ highly vetted, certified security researchers.

Upon performing each penetration test, Cobalt provides Userlane with a report containing the list of detected vulnerabilities along with recommended fixes. Userlane commits to implement fixes depending on the severity of the vulnerability. The timeline for such fixes is set as follows:

- Critical vulnerabilities: Fix immediately
- High vulnerabilities: Fix within 30 days
- Medium vulnerabilities: Fix within 60 days

Once a fix is implemented, the vulnerability is re-tested. The cycle is repeated until all vulnerabilities are confirmed to be fixed.

Monitoring

Userlane uses various monitoring tools to ensure maximum availability, performance and security of the application. The monitoring includes but is not limited to the following parameters:

Availability

- Availability of the application
- Accessibility of backend systems and services

Resources

- CPU utilization
- Utilization of network interfaces
- Utilization of persistent and volatile storage

Performance

- Response times of the application
- Response times of backend systems
- Query times for database contents

Security

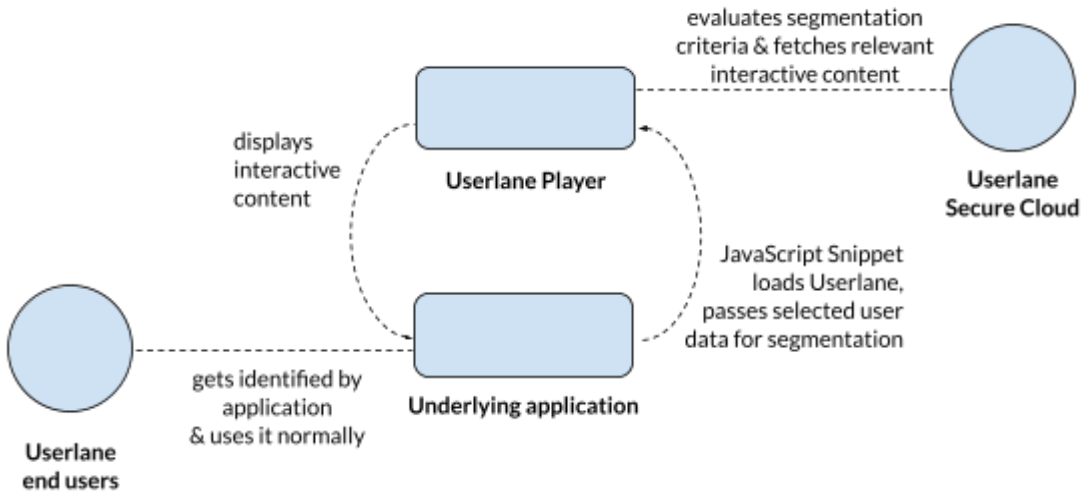
- Update status of systems
- Error logs
- Access logs

Backups

Userlane drives continuous backups of databases. With those database systems that support it, the database state can be restored to a previous sate down to the second. Other databases are backed up regularly, e.g. every 24hrs. The backups are stored in the same datacenter region, but a different availability zone. Backups are retained for 30 days. These backups are treated as sensitive data. Only specific personnel can access these backups after an internal authorization process.

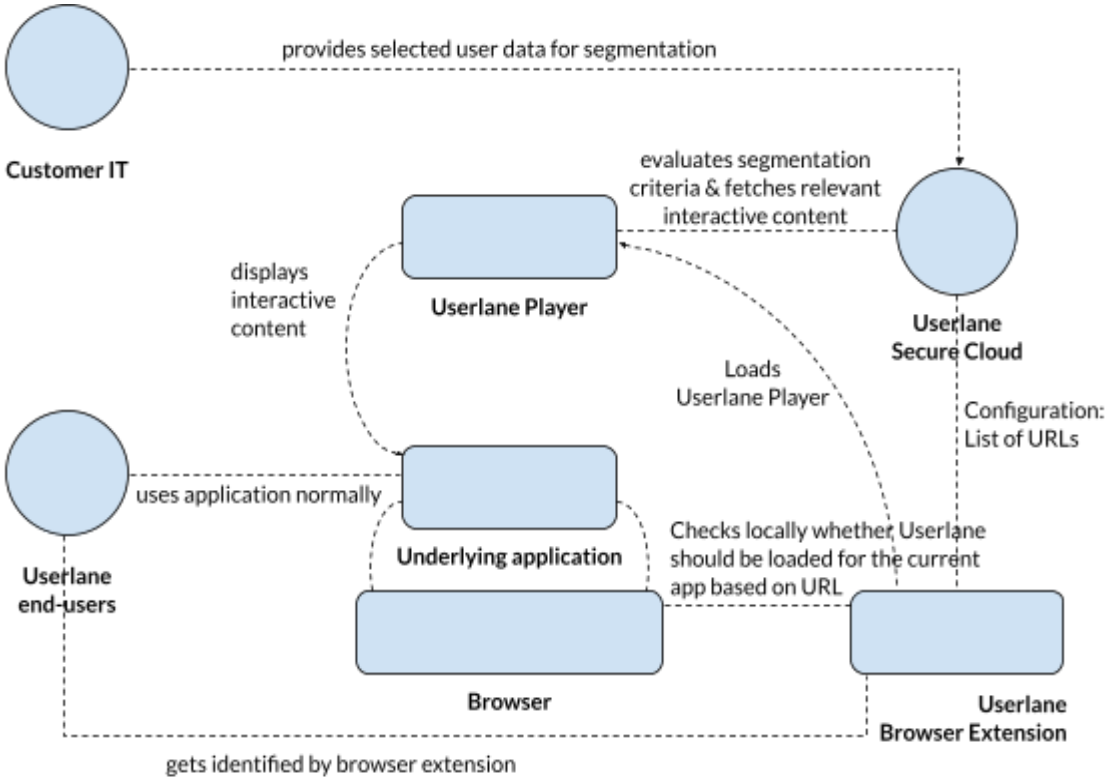
Data fields & data flow

Data flow when Userlane is implemented via JavaScript Snippet



Recorded data field	Purpose
Userlane Property ID (one per app)	To identify which app Userlane is loaded upon and fetch relevant content.
URL	To identify which app Userlane is loaded upon and fetch relevant content.
User ID	To identify the same user again and show the progress of completed Guides. If no User ID is passed into the JavaScript Snippet, Userlane automatically creates one and stores it in a cookie. This can be an anonymous identifier that does not qualify as personal data.
User Data (optional)	To segment users depending on groups/tags or attributes. If no User Data is passed into the JavaScript Snippet, Userlane works with empty/anonymous user profiles. Never is such data automatically collected. It always needs to be actively passed into the JavaScript Snippet.
Browser	To guarantee browser compatibility.

Data flow when Userlane is implemented via Userlane Browser Extension

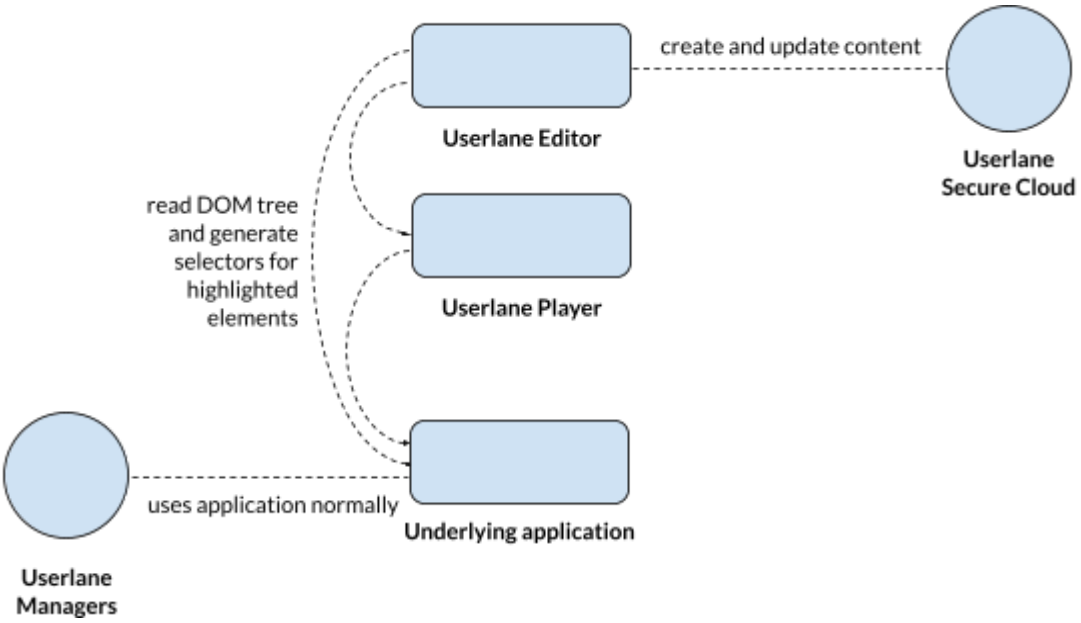


Recorded data field	Purpose
Userlane Property ID (one per app)	To identify which app Userlane is loaded upon and fetch relevant content.
URL	To identify which app Userlane is loaded upon and fetch relevant content.
URL patterns	To have the browser extension detect whether Userlane should be loaded.
User ID	To identify the same user again and show the progress of completed Guides. The User ID is always automatically generated by Userlane when the Browser Extension is used.
User Email Address	To authenticate the user on the Browser Extension via the following process: 1. To log into the Browser Extension, the user has to enter their email address 2. The user has to confirm the email address by clicking a link in an email 3. The user gets authenticated by the Browser Extension

User Data (optional)	To segment users depending on groups/tags or attributes. This User Data has to be actively passed towards Userlane via CSV file upload on the Userlane Dashboard. Userlane does not collect such data automatically.
Browser	To guarantee browser compatibility.

Data flow with the Userlane Editor

When using the Userlane Editor, there are additional data flows. This applies for both the JavaScript Snippet and the Userlane Browser Extension.



In addition to the data fields recorded by the implementation method, the Editor records these fields:

Recorded data field	Purpose
Element Selectors - potentially including • Node type • All node attributes (id, name, role, class, and others that are set on the element) • Number of parents, siblings, and children • The same also for all parents • The text content of the highlighted element during recording	To generate selectors that allow Userlane to highlight the same element again in the Player. The text content might be used as a fallback if there is a complex element structure (e.g., dynamic CSS-IDs) for the highlighted element.
URL of each step	To identify which page each step was recorded on.

Further Questions

Please don’t hesitate to reach out if you have further questions:

userlane	Technical Support Email:	support@userlane.com