



# Implementation and Security Document

**whatfix**

# Whatfix Platform Implementation and Security Document

Whatfix is a leading Performance Support platform which empowers organizations to efficiently manage the end-to-end product adoption lifecycle of their end users. Whatfix helps companies onboard, train and support their application users without any external intervention delivering a seamless product experience. For this, the platform allows organizations to create and embed interactive walkthroughs, within any web application, guiding users through every step of a workflow within the application. Whatfix addresses the critical product adoption challenge that every enterprise and business faces reducing the time-to-value of their business applications thereby improving users' productivity and performance.

This document provides an overview of the security protocols implemented by Whatfix to protect customers and their data.

## Whatfix Platform Modules

The Whatfix platform consists of the following modules.

### Whatfix Dashboard

Provides an intuitive and easy-to-use control panel where customers can manage and deploy widgets, manage created content, user privileges, configurations, and other advanced customizations. Whatfix provides six different widgets which can also be accessed and easily configured from the dashboard.

### Whatfix Editor

Allows for easy creation, editing and deployment of walkthroughs, smart tips, beacons and other widgets with a highly intuitive UI delivering a point and click experience. Administrators can also edit or retract existing walkthroughs from the Editor environment.

### Whatfix Analytics

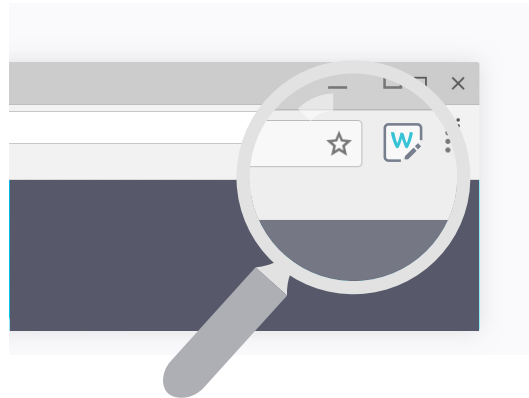
Deep real time insights into end user behavior patterns to help identify obstacles and drive decisions on end user onboarding and training strategy. The Whatfix Analytics engine allows tracking of metrics to understand the usage patterns of walkthroughs, engagement with the widgets, contextual help search patterns and end user guidance requirements.

# Whatfix Platform Implementation

The Whatfix platform configuration and implementation cycle spans three phases.

## Whatfix Content Development

Customers can create, edit and deploy walkthroughs on their target application using the Whatfix Editor browser extension, available for Google Chrome and Mozilla Firefox. Using the Editor extension is the sole way to create, edit and deploy Whatfix content. The Editor extension is highly secure and does not capture any form of browser data. Extensions for both Google Chrome and Mozilla Firefox are hosted on their respective web stores.



Once created, walkthroughs can be easily published on the Whatfix Cloud or the customer's own web server depending on the deployment model chosen. Whatfix also allows for management of the privileges accorded to multiple hierarchical levels of Whatfix content creators. Three user roles have currently been defined: Account Manager, Content Manager and Editor.



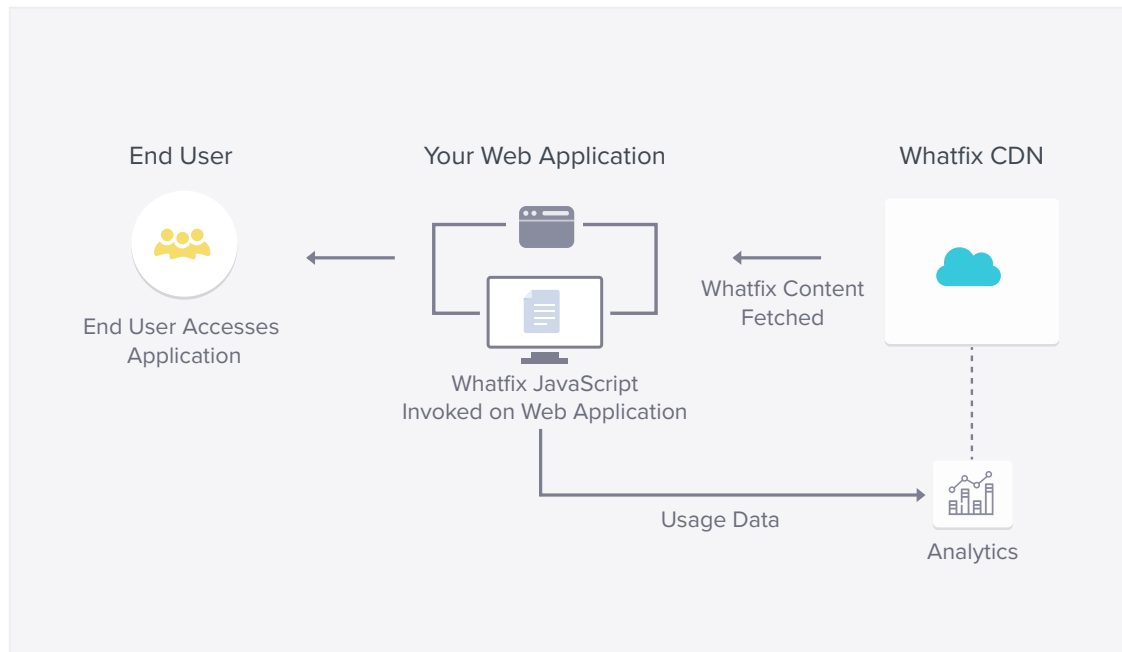
## Whatfix Provisioning and Deployment

Whatfix deployment phase follows the content development phase. Once customers have created Whatfix content using the Editor extension, they can deploy either on the Whatfix cloud or self-host on own servers for end user access. Whatfix also supports the provisioning of separate instances of sandbox and production environments in the target application. Content can be created and deployed in separate instances of both environments.

Once customers have successfully tested their content in the sandbox environment, they can push it to the production environment.

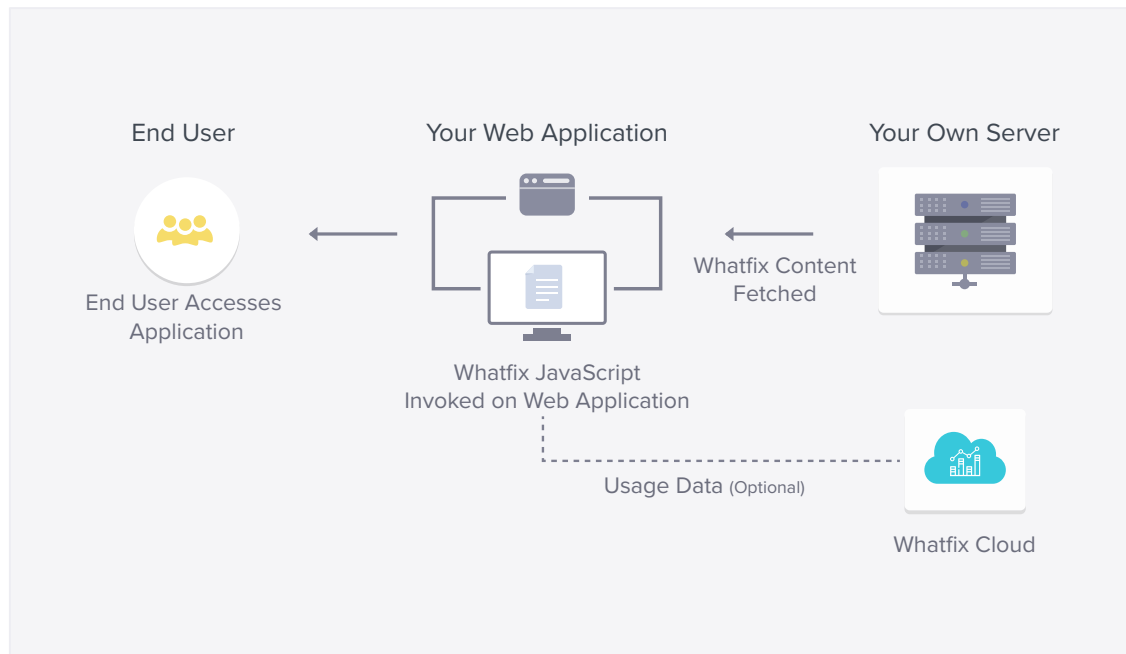
#### - Whatfix Cloud Deployment

In case of the Whatfix Cloud deployment mode, all the content created for the customer's target applications reside on the Whatfix Cloud. Walkthroughs are fetched from the Whatfix Cloud and served from the nearest CDN server to be rendered. Since content is being served from the nearest endpoint, this results in better performance. Whatfix Analytics is available and enabled, by default, in the cloud deployment model.



#### - Self-Hosted Deployment

In case of the self-hosted deployment model all the Whatfix content is stored and fetched from the customer's web servers or CDN. Whatfix allows for self-hosting through an export package which can be deployed manually on internal servers. Whatfix also provides APIs to automate the export of walkthroughs to internal servers. The export package typically contains JSON, JavaScript and HTML files in addition to images. In either case, here is no server side software required nor is there any connection to the Whatfix Cloud. In the self-hosted deployment mode, Whatfix Analytics has to be optionally turned on.



## Whatfix Content Delivery

The deployment phase is followed by delivery of the created content to the end users of the target application. Delivery requires the application to be able to access and fetch Whatfix content from the deployment location. For this, Whatfix provides customers with two methods.

### - JavaScript Integration

If the application allows access to its HTML code, which is the case with native applications or certain packaged software applications like ServiceNow, a single line JavaScript code is injected into the header of the application. This method seamlessly integrates Whatfix content into the application.

### - Browser Extension

In scenarios where the target application doesn't support JavaScript injection, end users would have to install a custom browser extension specific to their web browsers to access Whatfix content. Whatfix supports Google Chrome, Mozilla Firefox, Microsoft Internet Explorer, Edge (beta) and Safari (beta) to access walkthroughs. Whatfix also supports IT teams in enterprise wide installation of browser extensions through popular tools like System Center Configuration Manager (SCCM).

## Whatfix Platform Security

Whatfix takes the security of its customers very seriously. Information security principles are deeply inherent in our software development practices and operational processes to ensure our client and proprietary data is always protected. Whatfix also complies with a number of internationally accepted security standards.

Whatfix implements the following security protocols and measures.

### ISO 27001:2013 and SOC 2 Certified

Whatfix is both ISO 27001:2013 and SOC 2 certified having implemented global standards in Information Security Management. The certification demonstrates Whatfix's commitment to safeguarding data following information security best practices. SOC 2 compliance validates Whatfix's adherence to the five key trust service principles of security, availability, processing integrity, confidentiality, and privacy of the system.



### Vulnerability Scans, Penetration Testing and Security Reviews

Whatfix runs periodic security reviews and tests to remove vulnerabilities within the system, ensure protection against any threats and resolve events when they occur. Leading auditing company KPMG India acts as the security adviser and auditor for Whatfix's Vulnerability Assessment and Penetration Testing (VAPT) processes.

#### Security Advisor



Multiple enterprise customers have also performed comprehensive security assessments of Whatfix before deployment and found the platform to be highly efficient. Whatfix also follows a documented Disaster Recovery plan which is reviewed and tested on an annual basis.

### General Data Security and Javascript Design

Whatfix follows a secure development process guided by OWASP principles. Whatfix also has strong firewalls in place and runs in failover mode. Appropriate data is encrypted in keeping with our commitment to ensuring customer data security.

### Secure Creation of Content with Whatfix Editor

Whatfix content creation requires a customer Editor Extension to be installed. Whatfix has implemented the following measures to ensure highest levels of data security.

#### - Secure Access via HTTPS

Whatfix uses HTTPS across all properties and applications. Any information transmitted between Whatfix and the customer would be safe and secure.

#### - Secure 256 bit SSL

Whatfix uses 256-bit SSL certification for all communication. The SSL encryption is enabled by default. With the encryption in place all the sensitive information, such as login credentials, is transmitted securely.

#### - Secure Editor Extension

The Whatfix Editor extension is hosted on the web stores of Google Chrome and Mozilla Firefox. The entire code is hosted in the extension file itself. Whatfix extensions have also been vetted by the web stores of the browsers and are built following guidelines of the Content Security Policy. Also, the extension can be actively used only after due authentication.

## Authentication and Authorization

Access to the Whatfix Editor and Dashboard requires authentication using a username and password combination. Whatfix enforces strict password policies on both of these touchpoints. Organizations willing to align their Whatfix password policies with that of their general company policies can also do so.

### Single Sign-On

Whatfix also allows for Single Sign-On based authentication with an identity provider of choice. Implementation of Single Sign-On is based on SAML 2.0. With Single Sign-On, users don't have to sign in to Whatfix again after first signing into the target application.

Single Sign-On logs users automatically into Whatfix if they have been authenticated by the target application. Single Sign-On is not enabled by default. Customers will have to contact their respective Customer Success Manager to enable the feature informing them of the identity provider they want to use it with.

### Privileged Access Control

Whatfix also implements Privileged Access Control with three predefined roles carrying different privileges: Account Manager, Content Manager and Editor. The Account Manager the top most level in the hierarchy and has all the administrator privileges. The first person to create a Whatfix account within an enterprise, by default, becomes the Account Manager.

The Content Manager occupies the second level in the hierarchy and can create and edit content in addition to being able to make changes to content extending to the scope of the enterprise. The lowest level is occupied by the Editor who can create and edit Whatfix content but can't make any form of changes outside his/her scope.

## Data and Application Privacy

Whatfix platform doesn't, in any way, access or capture any data entered by application users at any time. The platform only captures a screenshot of the application it is being run on. This is for the purpose of multi-format support to generate videos, pdfs, slideshows which can be used outside the application environment. Sensitive information present on any such pages can easily be blacked out.

Whatfix captures very minimal Personally Identifiable Information (PII) of users. In case of Account Managers, Content Managers and Editors, Whatfix only captures the email addresses used for authentication. On the end user side, Whatfix profiles users only if the customer employs Analytics. If Analytics is disabled by the customer, no end user data is captured. Whatfix, however, also doesn't capture any form of browsing or activity history of any of the users. In either case, all the PII data captured by Whatfix is duly encrypted.

### General Data Protection Regulation

General Data Protection Regulation (GDPR) is a regulation ingrained in the European Union law on data regulation and end user privacy. Statutes under the GDPR are applicable to residents of the EU and is directly binding on all individual states of the EU. Whatfix is committed to safeguard the privacy of all the users of its platform as well as the security of any PII data that is captured and complies with the regulations of the GDPR.

## Performance and Scalability

Whatfix platform is a highly scalable enterprise grade software designed to heavy concurrent traffic. The monthly availability currently stands at approximately 99.99% for all production systems. Whatfix also maintains global application performance through the use of edge cached CDNs. Whatfix's CDN server nodes are spread throughout the world in multiple locations with regional edge caches across different continents.

Being a lightweight platform, Whatfix doesn't add any burden on the target application. JavaScript execution on each application page typically takes about 0.025 seconds. The embedded script size is approximately 3 KB while the main JavaScript file size is about 110 KB. By default, Whatfix supports about 100,000 concurrent requests per second. However, this is not the maximum limit and can be increased upon customer request if the number of users are significantly high.



## Integration and Extensibility

Whatfix supports bidirectional exchange of learning and training material with organizations' existing infrastructure. Conversion of Whatfix content to multiple formats like videos, pdfs, slideshows and articles allows for its use outside of the Whatfix and application environment. It also integrates with other third party applications in the Learning & Development and Customer Support domains. Whatfix is SCORM compliant making it easy to integrate with leading LMS clients.

Whatfix also has ready integrations with Customer Support tools like Freshdesk, Intercom and issue tracking applications like Confluence.

## Conclusion

Whatfix's proactive approach to security and stringent protocols described in this document help protect customers' data and applications while delivering a seamless product experience to the end users. At Whatfix, the security of all our assets and those of our customers is of paramount importance to us. We also continuously monitor the threat landscape, keep ourselves updated and periodically relay any concerns and fixes to our customers so as to ensure that they are effectively shielded.

Whatfix is a leading Performance Support platform that helps accelerate product adoption by redefining the way companies onboard, train, and provide support to users. Several Fortune 500 enterprises worldwide rely on Whatfix to reduce the time-to-value of business applications thereby improving users productivity and performance.

Information in this document is subject to change without notice. For more information on Whatfix solutions and security, please contact your Whatfix Enterprise Sales Representative. You can also log on to <https://whatfix.com> for further information.

20180328SECURITY