



## Epok Edition for Microsoft SharePoint



### Secure and private business advisory collaboration with middle market clients

Padgett, Stratemann & Co., L.L.P. (PS&Co.) is one of the largest locally owned CPA and business advisory firms in Texas with offices in San Antonio and Austin. Since 1945, PS&Co. has served middle-market businesses. Their team members strive, each day, to exceed their clients' expectations by offering them trusted financial and business advice. Professionalism, personal attention, and commitment are built into every relationship, every service, every time.

#### Epok Advantages

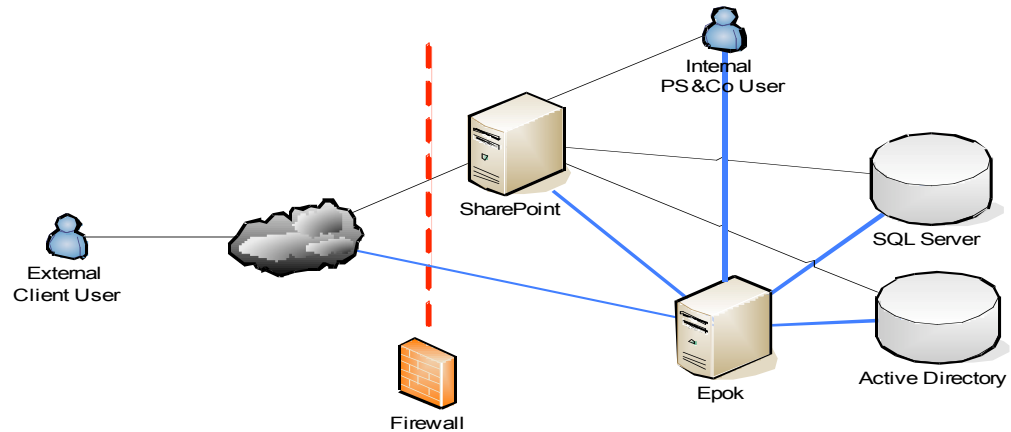
- **Empowers PS&Co. team members**
- **Links extranet access rights to client agreements**
- **Dynamic policy enforcement improves security and compliance**
- **Reduces IT burden for client representative's identity management**

PS&Co. had standardized on Microsoft SharePoint 2007 as the collaboration platform for working with their clients. They wanted the ability to create a unique SharePoint site for each of these clients to foster secure and private collaboration between the client's representatives and their PS&Co. team members. However, this required that each of the client's many representatives be added to PS&Co.'s corporate Active Directory and managed by their busy IT staff. This presented PS&Co. with both a resource as well as a security issue that needed to be addressed before this service could be provided.

By leveraging the Epok Edition for Microsoft SharePoint solution, PS&Co was able to support these external client users without needing to add them to its internal Active Directory. Using Epok's solution they were able to segregate client's users in a separate directory implemented in SQL Server, mitigating the risk of inadvertent access to other corporate assets. They were also able to delegate the management of these users out to a trusted manager at the client organization, greatly reducing the required IT support as well as increasing agility on the client to control who from their organization was given access to its site. Additionally, as financial and other sensitive information is shared, terms and conditions governing the information usage is presented for acknowledgement. All access and all authorizations are visible to both security and management personnel, allowing PS&Co. to enforce policy and compliance requirements. PS&Co also chose to utilize the Epok Edition for Microsoft SharePoint for authentication and authorization of its internal users, stored in Active Directory, to the same client sites. This allowed them to easily manage, in one place and with one interface, which users (either internal or external) had access to which client sites.

The deployment required the addition of only one server to the PS&Co infrastructure. This server hosted the Epok Edition for Microsoft SharePoint and is shown in the high-level diagram below with its interconnections with the other PS&Co infrastructure components. The implementation of this solution required migrating PS&Co's client users from the Active Directory to the SQL Server repository. This achieved the desired separation from the AD. It also produced additional cost savings by reducing the number of accounts in AD.

## Epok Edition for Microsoft SharePoint



### Benefits of Epok Edition for SharePoint:

- Segregation of external user accounts from corporate Active Directory
- Delegated management of external user accounts to client trusted representatives
- User acknowledgement of policy and regulations
- Authorization workflow controlled by site information owner
- Watermarking of documents
- Automatic expiration of access rights
- Document level access control
- Full logging and audit including authorized purpose of all access
- Reduced risk of inadvertent disclosures or unauthorized access

Epok's core technology uses industry standard technologies like SAML and XRI to connect disparate Active Directory and LDAP user repositories and authorize users across identity boundaries. It provides a complete set of applications that allow IT to empower SharePoint site administrators to manage and track access to all of their SharePoint sites. It reduces the burden of user management for IT while improving security and visibility of the sharing process.

### ABOUT EPOK

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Based in Bethesda, Maryland, USA, Epok, Inc. is a privately funded software company. Epok's federated access management software lets organizations securely extend application access across organizational boundaries leading to improved extranet flexibility, lower cost of operations, and enhanced compliance and security. Epok's products are sold to commercial, government and non-profit organizations. For more information, please visit [www.epok.net](http://www.epok.net).

