

## CT Summation Securing the CT Summation Network-Application Directory Using the Standard Security Scheme

Applies to iBlaze product family network systems version 2.x using the Standard Security scheme.

### Note:

This document assumes that you have a strong understanding of Microsoft Windows permissions and the tools associated with setting those permissions, and that you are working in a Windows domain environment on a Windows 2000 or 2003 server. If you need additional information on setting permissions in the Windows environment, please consult your operating system's help system

# Best Practices for Securing the CT Summation Network-Application Directory using the Standard Security Scheme

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This document is intended to assist in securing the iBlaze network-application directory and is designed to assist in securing the application and data files through the Windows file system.

### INTRODUCTION

This document is intended to assist in securing the CT Summation iBlaze network-application directory. Network-application directory security settings should be performed in conjunction with application permission settings that are defined using the iBlaze Administrator's Console (SWAdmin.exe) included with all iBlaze family products.

This document is only designed to assist in securing the application and data files through the Windows file system. For more information on setting application permissions using the Administrator Console, please refer to Online Help.

Recommendations in this document are based on "typical" systems using the default file structure. You may also find that some of these files can be locked down further. However, in the interest of practicality, only directory

permissions will be discussed herein, as setting individual file permissions can be overwhelming and time consuming. It is imperative that you perform thorough testing in your environment to ensure that the end result is appropriate for your network/system environment. You are responsible for ensuring that these permissions are appropriate for your environment.

## PREPARATION

1. Create a Windows 2000/2003 local group on the server for iBlaze users, for example **SummUsers**. This local group will be used to assign file permissions to CT Summation users and perhaps global groups of users. Populate this local group with the appropriate 2000/2003 users and/or global groups from your 2000/2003 domain.
2. Create a 2000/2003 local group on the server for the CT Summation administrator(s), for example **SummAdmins**. This local group will be used to assign file permissions to administrators and perhaps global groups of administrators. Populate this local group with the appropriate 2000/2003 users and/or global groups from your 2000/2003 domain.
3. On the server, set the SHARE-LEVEL permissions for the iBlaze network-application directory to:
  - a. SummUsers – Change
  - b. SummAdmins – Full Control

## FILE SYSTEM (NTFS) PERMISSIONS:

1. Set the **ROOT** of the Summation network-application directory to:
  - a. SummUsers – Read/Write/Execute (de-select Full Control and Modify)
  - b. SummAdmins – Full Control
2. Remove the **Inherit from Parent Setting for These Directories** attribute and set the **Cases\***, **Client Setup, Common, Defaults, eDocsSamples, HTML, Images, PDF, Windows, System32, and UI** sub-directories permissions to:
  - a. SummUsers – Read-Only
  - b. SummAdmins – Modify
3. Since you are using NT Security (in the Administrator Console), do not change the permissions on the **Admin** directory. These permissions must be set in the Administrator Console.
4. Remove the **Inherit from Parent Setting for These Directories** attribute and set the permissions for the **CaseData** and **Profiles** sub-directories to:
  - a. SummUsers – Modify
  - b. SummAdmins – Full Control
5. CT Summation recommends that file-system auditing is set to log the following access on the network-application **ROOT** directory and all sub-directories (see your Windows help system for more information on Auditing files and folders):
  - a. Delete – Success or failure by the **Everyone** group.
  - b. Delete Subfolders and files – Success or failure by the **Everyone** group.

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### Note:

There are situations when the iBlaze utility will attempt to run automatically as part of a process such as when loading eDocs, eMail, transcripts, and images. If you are setting more granular case permissions such as those suggested in Case Permissions above, the user must have Modify permission for the appropriate case(s).

### ADDITIONAL OPTIONS

**Case permissions** – If further granularity is desired for individual cases, additional file system permissions may be applied to the individual case directories under the **CaseData** directory. If you want to further restrict file permissions for individual cases, create additional groups or use individual user accounts to limit access to the cases listed under the **CaseData** sub-directory.

Users that need access to the case must have **Modify** rights in order to successfully work with the individual cases.

### Multiple “Cases” sub-directories

– Some environments use more than one **Cases** directory to limit the cases listed in the case-open dialog. Users must have at least **Read** permissions to the **Cases** sub-directories containing the CI files that they will be accessing. Be sure to set appropriate permissions for these directories if they exist. See the **Creating Cases** section below for those who need permissions to create cases.

**Creating cases** – In order to successfully create new cases, the user must have **Modify** permissions on the **CaseData** and **Cases** directories.

**Running utilities** – In order to successfully run the case utilities including DB Check/Pack/Blaze, transcript Blaze, and ocrBase Blaze, the user must have **Modify** permission on the appropriate **CaseData** directories.



## CT Summation

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