

PSC Case Study



Tightening Information Access with Reader Field Security

The Problem – *Uncontrolled access to sensitive data*

An independent product safety certification organization with worldwide facilities needed to tighten the access to their client product inspection application databases. Their legal department wanted to ensure that outside contractors only had visibility to records assigned to them or to their inspection center (IC) while continuing to provide internal employees with access to all records in the system. They were looking for a low cost solution that was compatible with their Lotus Notes-based process.

The Analysis – *Picking the best alternative*

The product safety certification process is centered on single system that manages client product inspections on a global scale. This integrated application houses millions of subscriber information and history documents in nine databases that can be accessed by all internal employees and contractors. The individual inspection centers (IC's), located throughout the world, are responsible for coordinating and documenting field inspections using this information.

The inspection application was using replication formulas to manage data that was downloaded (replicated) to laptops of field representatives – employees or contractors – assigned to specific IC's. The formulas, used with the downloading process, were designed to ensure that users could only replicate a subset of data that specifically related to their needs. Although this was an effective means to manage the size and replication times of local databases, it fell short when it came to protecting the confidentiality of their clients. Under the current system, any user could change or remove the replication formula, or directly access the server to see all records that exist in the databases.

The Solution – *Reader field security*

PSC began the project by first identifying and evaluating alternatives – five potential options to the current Lotus Notes configuration. Implementing Reader fields to establish record-level security was selected as the best way to restrict access to individual records inside of the application. This solution addressed both the current and future requirements to control document access. Further, the solution would provide the best level of record security without the excessive cost of new servers and ongoing maintenance and administration. Here are some of the key components.

- Three new Reader fields were added to all secured documents and assigned to all IFS documents for a given Subscriber -- Subscriber Cards, Inspection Reports, Variation Notices, etc. – regardless of whether the document was created in the Notes client or in the back-end by an agent.
- Field rep membership in the IC and Subscriber Number groups embedded in the Reader fields is centrally managed using a new automated Configuration Application that contains a 'person' record for each field rep. The Configuration Application is integrated with the Domino Directory, such that field rep IC and Subscriber Number assignments are immediately translated into necessary Domino Directory Group updates
- The process for assigning or reassigning Subscriber Cards was modified to update all existing related records. This will provide Field Representatives taking over new clients with visibility to the past history – an improvement over the current process, where new Reps could only see new records created after they took over the account.
- A new 'one-time' agent was created to provide the new security to existing data. A new process was created for all new product inspections. This approach will allow for a phased deployment.

Once fully implemented, the solution will make it unnecessary to use local replication formulas in most cases. The new solution will not only properly restrict document access for both server and local replicas, but also will reduce or, in some cases, eliminate the need to manually manage and administer the overall process.

The Benefits

- Better and more selective security
- Easier administration
- Simplified processing
- Improved performance

The Technology

- Lotus Notes



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PSC Group, LLC is an information-technology and professional services consulting firm that specializes in business process architecture and back-end integration.

We have extensive experience in the integration of IBM Lotus with Microsoft Office, OpenOffice.org, and Lotus Symphony. PSC is considered the leading resource for Lotus Symphony development and automation.

We are also expert in enabling databases and ERP systems to work together with CRM and Workflow applications and processes.

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