



# AUTHENTICATION OPTIONS AND INSTALLATION PACKAGES FOR CSI LAWYER

CSI Lawyer version 11.0

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## AUTHENTICATION AND CSI LAWYER

CSI Lawyer uses a Microsoft SQL Server database. To log in to CSI Lawyer, the user must authenticate on two levels. Access is verified as follows:

1. On SQL Server level the user's rights to connect to the database.
2. On the database level the user's rights to login to CSI Lawyer.

For security reasons CSI strongly recommends the combination of SQL Server login and Azure AD authentication. This way users need to know only their Azure AD account for database connection.

The available authentication options at the SQL Server and database level, as well as the installation packages are presented below.

### Authentication to a SQL Server Database

There are two alternative authentication modes in Microsoft SQL Server. Both modes require a login which is granted the necessary rights to establish a database connection.

#### 1. Windows Authentication

With Windows Authentication mode the authentication to database is performed using the user's Active Directory account. Usually, an AD group is added as a login in SQL Server and in AD the CSI users are added as members of this group. The users receive their access rights directly from the group membership and for database connection they only need to know the SQL Server and the name of the database.

#### 2. Mixed Mode (SQL Server + Windows Authentication) - RECOMMENDED

Using the Mixed Mode option allows a SQL Server authentication towards the SQL Server and a database. For this, a separate SQL login with appropriate rights is added. In this case the user needs to know, in addition to the server and database name, the SQL login and its password.

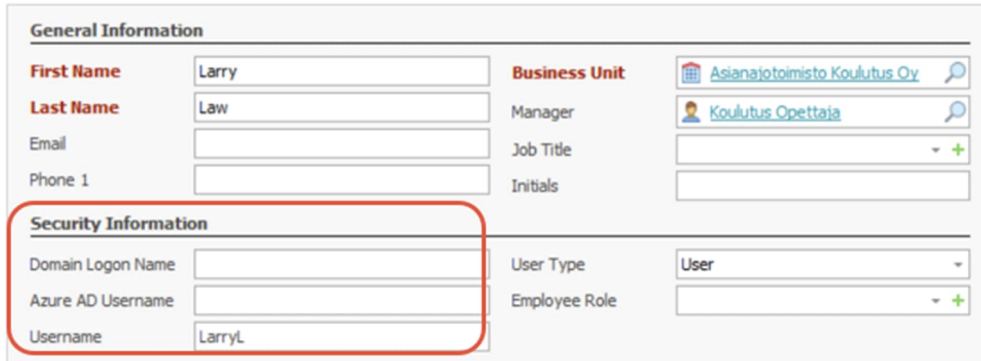
### Authentication to CSI Lawyer

Logging into CSI Lawyer requires establishing a database connection between the software on the user's workstation and the database, as well as the user logging into CSI Lawyer. The method of establishing the database connection depends on the chosen login option.

For logging into CSI Lawyer, there are three options available:

- domain logon name
- traditional username and password combination, or
- Azure AD account

The options for logging in can be found from Settings, under the user's Security Information.



General Information	
First Name	Larry
Last Name	Law
Email	
Phone 1	
<b>Security Information</b>	
Domain Logon Name	
Azure AD Username	
Username	LarryL
Business Unit	Asianajotoimisto Koulutus Oy
Manager	Koulutus Opettaja
Job Title	
Initials	
User Type	User
Employee Role	

## 1. Domain Logon Name

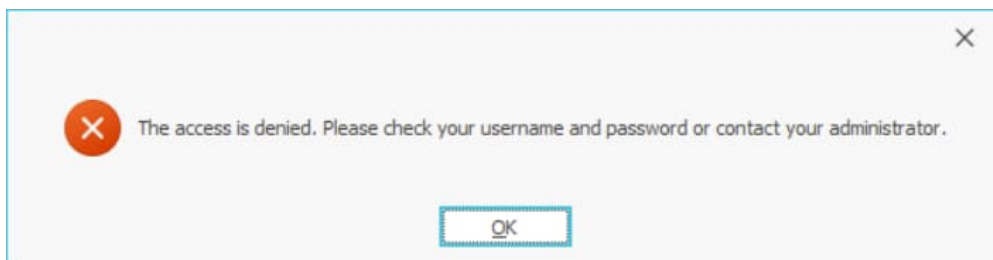
When using the domain logon name option, the user's domain account allows access to the software in the same way as Windows authentication mode allows access to SQL Server. In this case, it is sufficient that the user logs in to the workstation with the account matching the information entered to the CSI database, and that the user has established a database connection.

If, despite using the domain logon name, CSI Lawyer requests a username and password, it is recommended to first verify that the logon name is correct in the user's information. The result given by the **whoami** command in the Windows command prompt must match the domain logon name in the user's information.

## 2. Username + password

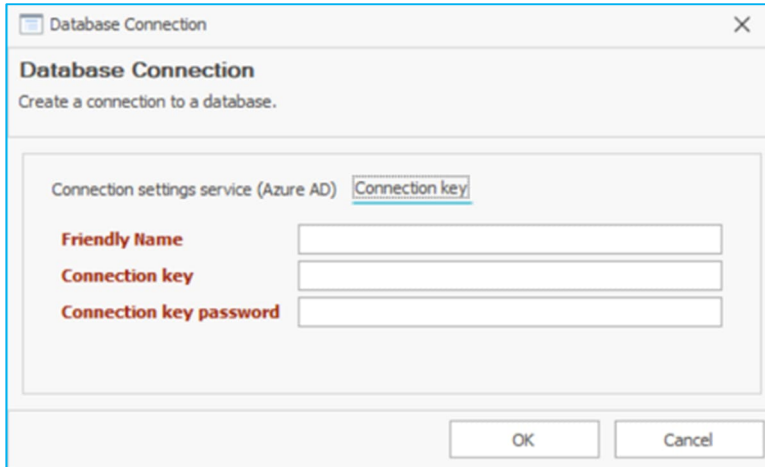
If the Domain logon name and Azure AD username are left blank, and the Username field is filled in for the user (+ the password added from the password function in the ribbon), CSI Lawyer will prompt the user for username and password when logging in.

If the username/password prompt gives the error message "Access is denied", either username or password is incorrect. The power user of CSI Lawyer can check the username and set a new password.



When either domain logon name or username + password is used, the database connection is, starting from version 11.0, established using a combination of connection key and a password.

Users get the connection key and its password from a power user, who can send the information directly from the users list in CSI Lawyer, using the Send Connection Key button. The received information is saved in the Database Connection window (Connection key tab):



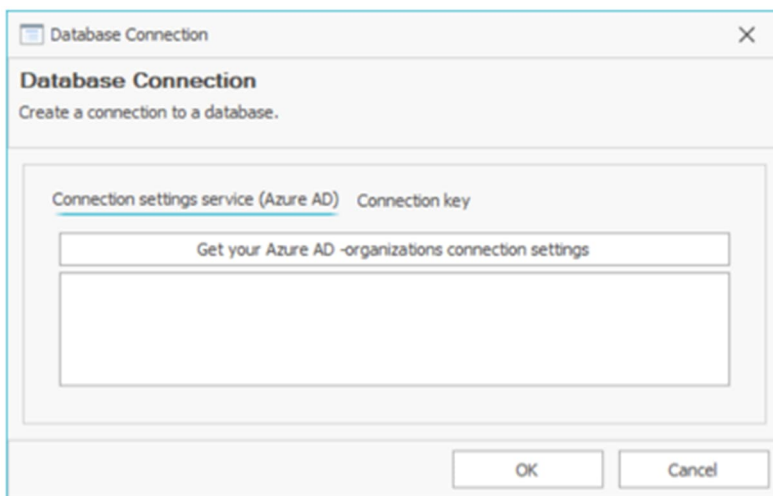
The screenshot shows the 'Database Connection' window with the 'Connection key' tab selected. The window title is 'Database Connection' and it contains the text 'Create a connection to a database.' Below this, there is a section for 'Connection settings service (Azure AD)' with a sub-tab 'Connection key'. This section contains three input fields: 'Friendly Name', 'Connection key', and 'Connection key password'. At the bottom of the window are 'OK' and 'Cancel' buttons.

### 3. Azure AD Account – RECOMMENDED

Azure AD –account is basically similar to domain logon name. However, this option requires the customer's Azure administrator to register the database on CSI's registration website (<https://auth.csihelsinki.fi/>). This is something CSI cannot do for the customer.

After Azure AD sign-in is enabled, users can sign in with Azure AD account only: Domain logon name and username/password options are not available.

When the user's Azure AD account matches with the account defined in CSI database (User > Azure AD username), the connection can be easily established from the Connection settings service (Azure AD) tab in the database connection window. Clicking "Get your Azure AD organizations connection settings" lists all the databases the user's account has access to. The connection is established by choosing the database and clicking OK.



The screenshot shows the 'Database Connection' window with the 'Connection key' tab selected. The window title is 'Database Connection' and it contains the text 'Create a connection to a database.' Below this, there is a section for 'Connection settings service (Azure AD)' with a sub-tab 'Connection key'. This section contains a button labeled 'Get your Azure AD organizations connection settings' and a large empty rectangular box below it. At the bottom of the window are 'OK' and 'Cancel' buttons.

## INSTALLATION PACKAGES OF CSI LAWYER

CSI Helsinki makes two different types of installation packages. To avoid problems, it is important to decide which installation package to use and then make sure that all the installations for the users/workstations of the entire organization use the same installation package. All users must have the same version of CSI Lawyer. The CSI database stores information about the software version used to log in, and users cannot log in with an older version.

The installation package options are as follows:

1. ClickOnce package, which installs CSI Lawyer in the user profile and does not require admin rights on the workstation for installation. ClickOnce also can search for a new version after the database has been updated. ClickOnce can be obtained either by
  - downloading the latest general installation package directly from CSI's website, or
  - requesting CSI to provide a new customer specific package.
2. MSI package, which is usually intended for centralized distribution.

CSI publishes new ClickOnce package versions monthly. Since only the latest software version is available on the website, this installation package is best suited for an environment where the turnover of workstations and users is moderate. After a customer updates one workstation to a new software version from the website, the CSI database is updated according to the new version, in which case all other users must also update their software.

A customer specific ClickOnce package allows the customer to control the update schedule because all new workstations are updated from the same installation package. ClickOnce packages made at the customer's request contain information about the location of the package, so customer-specific packages are typically stored in a shared folder in the customer's own environment.

When installing with an MSI package, it's recommended to save the package in a place where it can be found for later installations. All new workstations can be installed from the same package until the next version update is scheduled.

Because each release of an installation package is a new version from the database's point of view, it is important that CSI Lawyer is installed on all workstations from the same package. This way the situation where some users have an older version and cannot log in can be avoided. Also, a mix of different package types on users' workstations using the same database typically causes problems with the use of the software.