



## **DocuSnap X Discovery Service**

Installation and Configuration

<b>TITLE</b>	DocuSnap X Discovery Service
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<b>DATE</b>	7/12/2017
<b>VERSION</b>	1.1   valid as of September 19, 2016

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## TABLE OF CONTENTS

1.	Docusnap X Discovery Service	4
1.1	Connection	4
1.2	Data Transmission	4
2.	Prerequisites for Using the Docusnap Discovery Service	5
2.1	System Requirements	5
2.2	Verifying the Prerequisites	5
3.	Preparing the Docusnap Discovery Service	7
3.1	Configuring the Docusnap Discovery Service	8
3.2	Creating the Installation Package	10
4.	Installing and Configuring the Docusnap Discovery Service	11
4.1	Installation	11
4.2	Configuring the Connection	13
4.3	Docusnap Discovery Services Updates	15

## 1. Docusnap X Discovery Service

Until version 6.3, performing a decentralized inventory with Docusnap required a “workaround”, i.e. you had to use a second fully-featured Docusnap installation and a time-consuming database export and import process. The Docusnap Discovery Service is a new Docusnap component which allows you to automate inventory scans such that they are performed at a decentralized location, including the transfer of the results to a central Docusnap server.

After successfully connecting the Docusnap Discovery Service to the central Docusnap Server, you can manage and start inventory jobs from the central location.

### 1.1 Connection

For connecting the Docusnap Discovery Services to the central Docusnap Server, the http or https protocol is used. Using these standard protocols has the advantage that it is not necessary to configure special firewall settings (outbound configuration) at the decentralized location. All data and information is transmitted in encrypted form.

### 1.2 Data Transmission

For the transmission of data and information, the http or https protocol is used as well. The results of each job are temporarily stored in files on the computer running the Docusnap Discovery Service and forwarded to the central Docusnap Server as soon as a connection can be established.

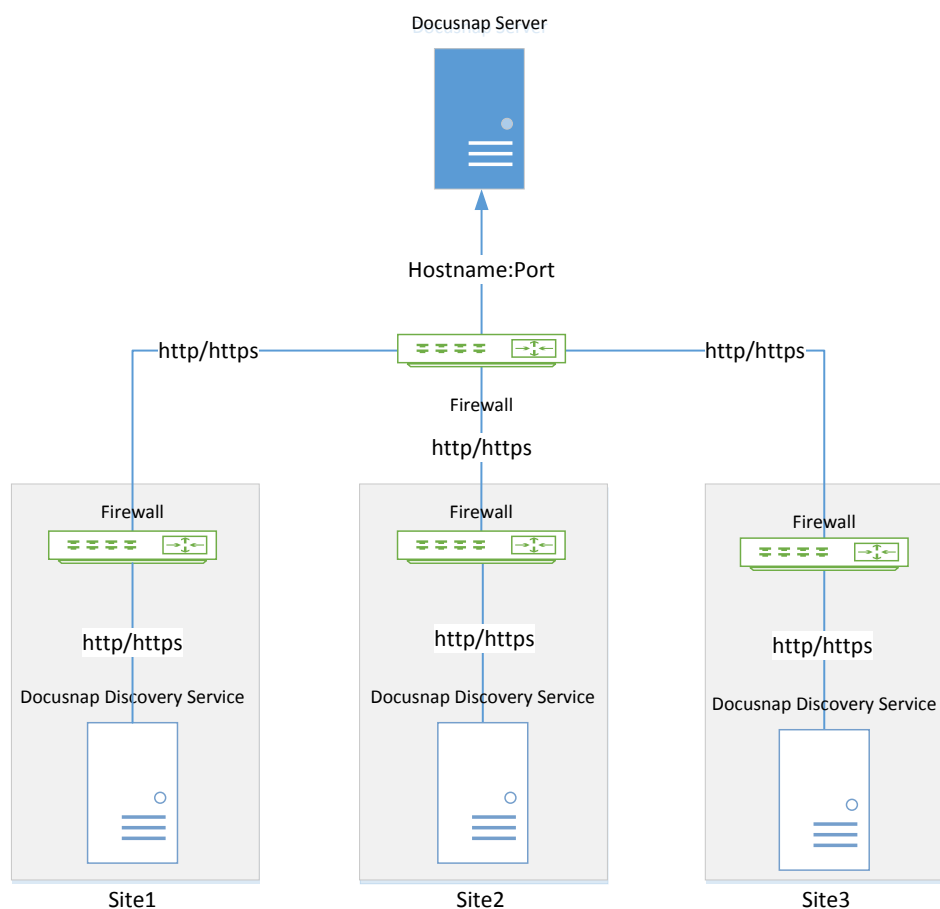


Fig. 1 – Docusnap Discovery Service – Overview of the working principle

## 2. Prerequisites for Using the Docusnap Discovery Service

Using the Docusnap Discovery Services requires that a Docusnap Server for the respective Docusnap database has been configured and is up and running at the central location. The Docusnap Discovery Service must be installed on any computer at the location to be inventoried.

### 2.1 System Requirements

- Microsoft Windows 7 SP1 or Windows Server 2008 R2 SP1 or higher
- At least 2GB RAM (recommended)
- At least 2 CPU cores (recommended)
- [.NET Framework 4.6.1 or higher](#)

### 2.2 Verifying the Prerequisites

To make sure that you will be able to successfully configure the Docusnap Discovery Service, you should verify the Docusnap Server configuration.

1. The Docusnap Server configuration must have been completed successfully. This includes enabling the Docusnap Server API. To do so, run the configuration wizard (Fig. 2). To verify the correct configuration, check the settings (Fig. 3).

The procedures are described in a separate HowTo document called “Docusnap X Installation and Configuration” that is available for download in the [HowTo area](#) of our website.

2. The Docusnap Server service must have been started and must be accessible from the network.
3. For inventories using the Docusnap Discovery Service, make sure that the central Firewall forwards requests to the respective Docusnap Server.

External Host Name (optional) and Port: these are required for accessing the Docusnap Server API within the organization. The host name is used for connecting both to the Docusnap Discovery Services and to the Web Client.

The authentication scheme only applies to the authentication using an Internet browser.

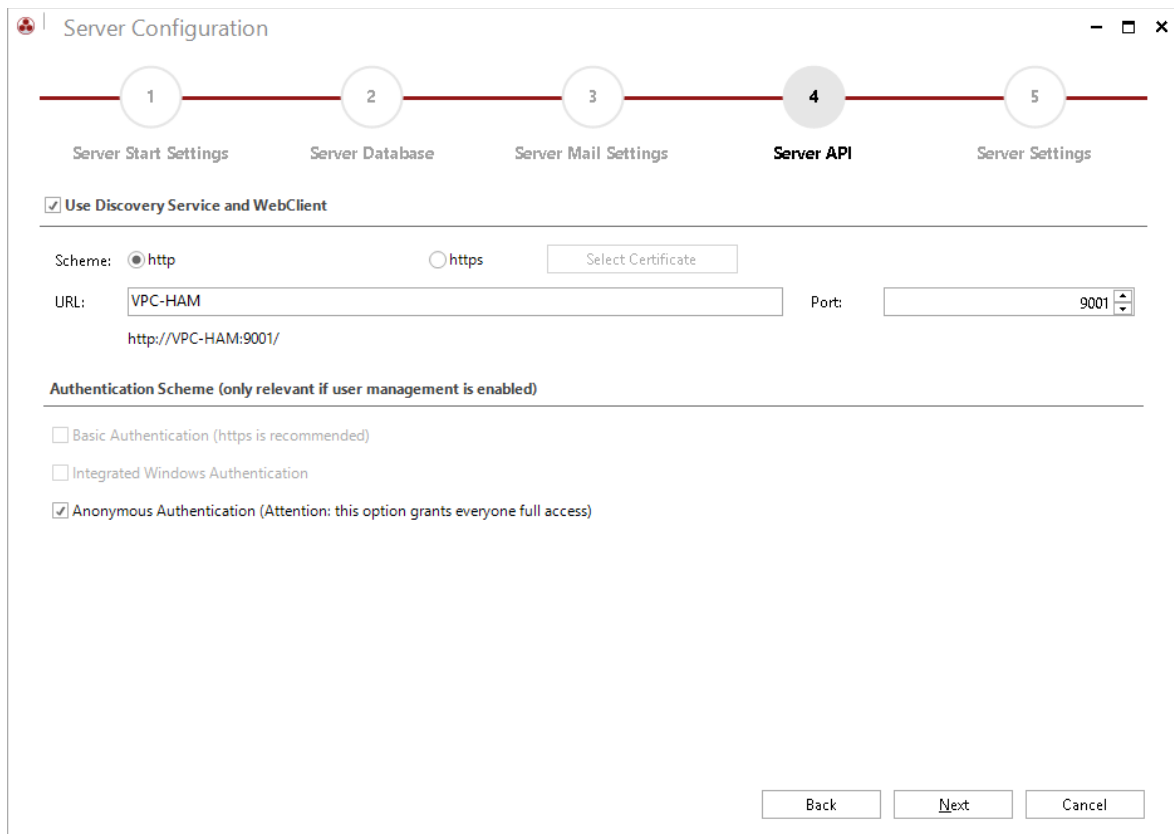


Fig. 2 – Prerequisites for using the Docusnap Discovery Service – Docusnap Server configuration

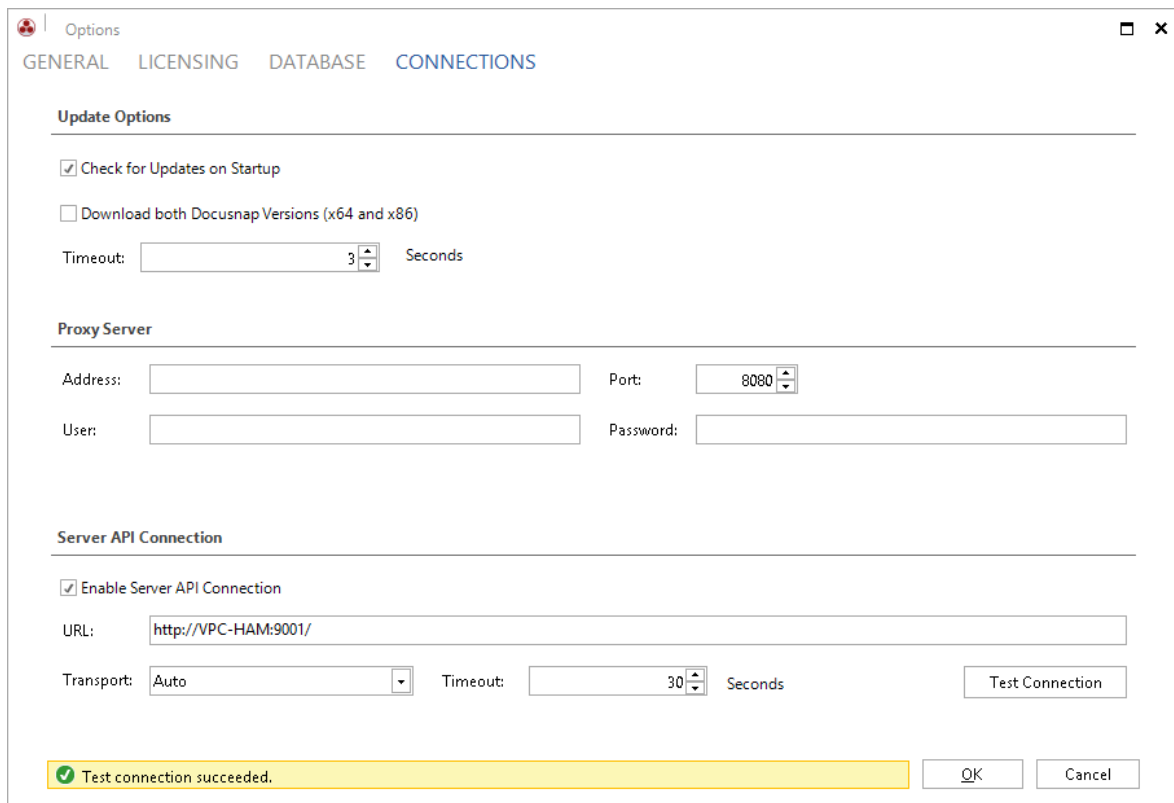


Fig. 3 - Prerequisites for using the Docusnap Discovery Services – Checking the Docusnap Server API

### 3. Preparing the Docusnap Discovery Service

In Docusnap, the Docusnap Discovery Service is paired with a company (tenant). This is necessary to enable the assignment of the inventoried data to the respective company (tenant). During the pairing process, a separate encryption for the data exchange is defined.

Start the configuration process for the Docusnap Discovery Service from the Docusnap Client.

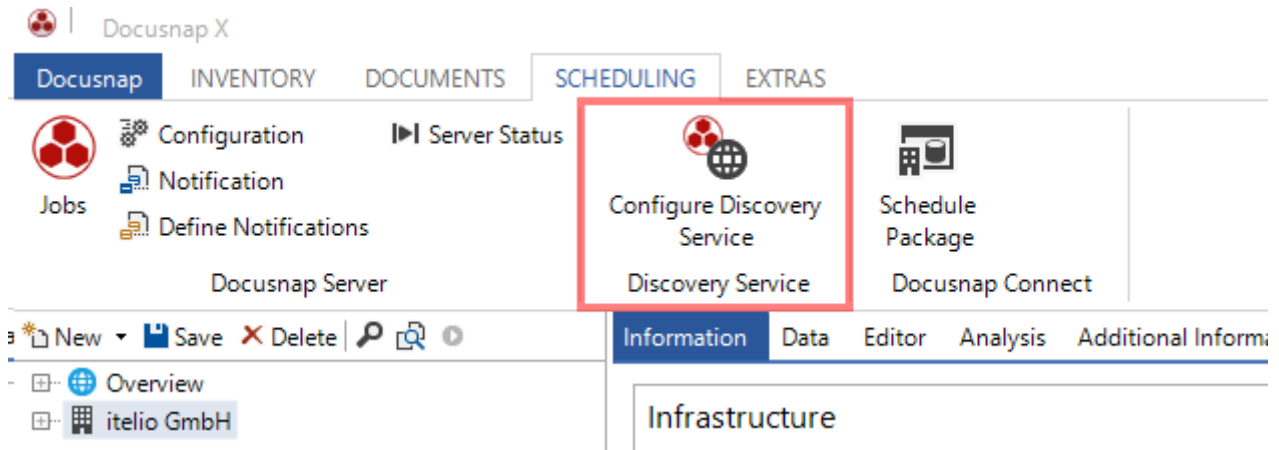


Fig. 4 – Configuring the Docusnap Discovery Service

### 3.1 Configuring the Docusnap Discovery Service

Click the “New” button to create a new service. Enter a name for the Docusnap Discovery Service and select the desired company (tenant) and site (location) to be paired with the Docusnap Discovery Service.

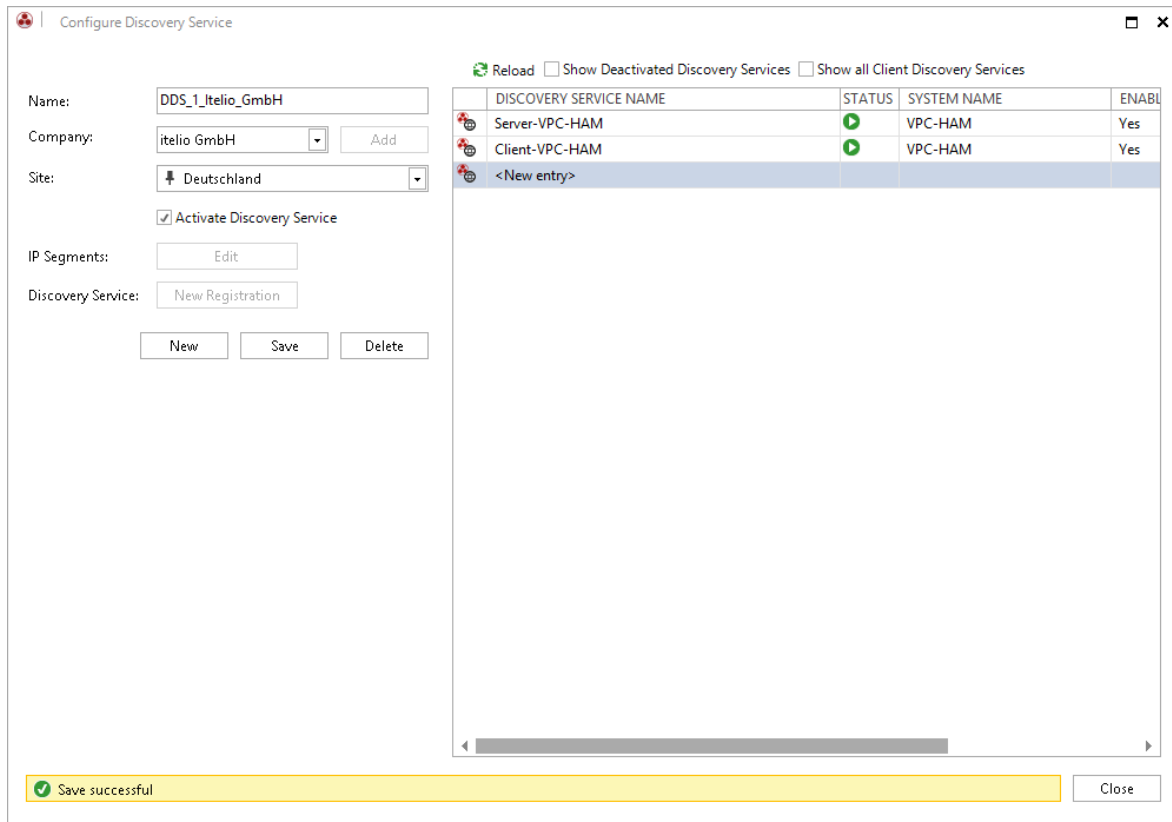


Fig. 5 – Configuring the Docusnap Discovery Service – Creating a new Discovery Service

When you save the newly created Docusnap Discovery Service, a dialog opens where you can create a complete installation package as a ZIP file. This ZIP file can then be used to install the service on a computer at the location to be inventoried. For more, information, please refer to section 3.2.



**IMPORTANT!**

In the final configuration step, you need to enter the IP segment for each Discovery Service. To access this dialog, click the Edit button under IP Segments.

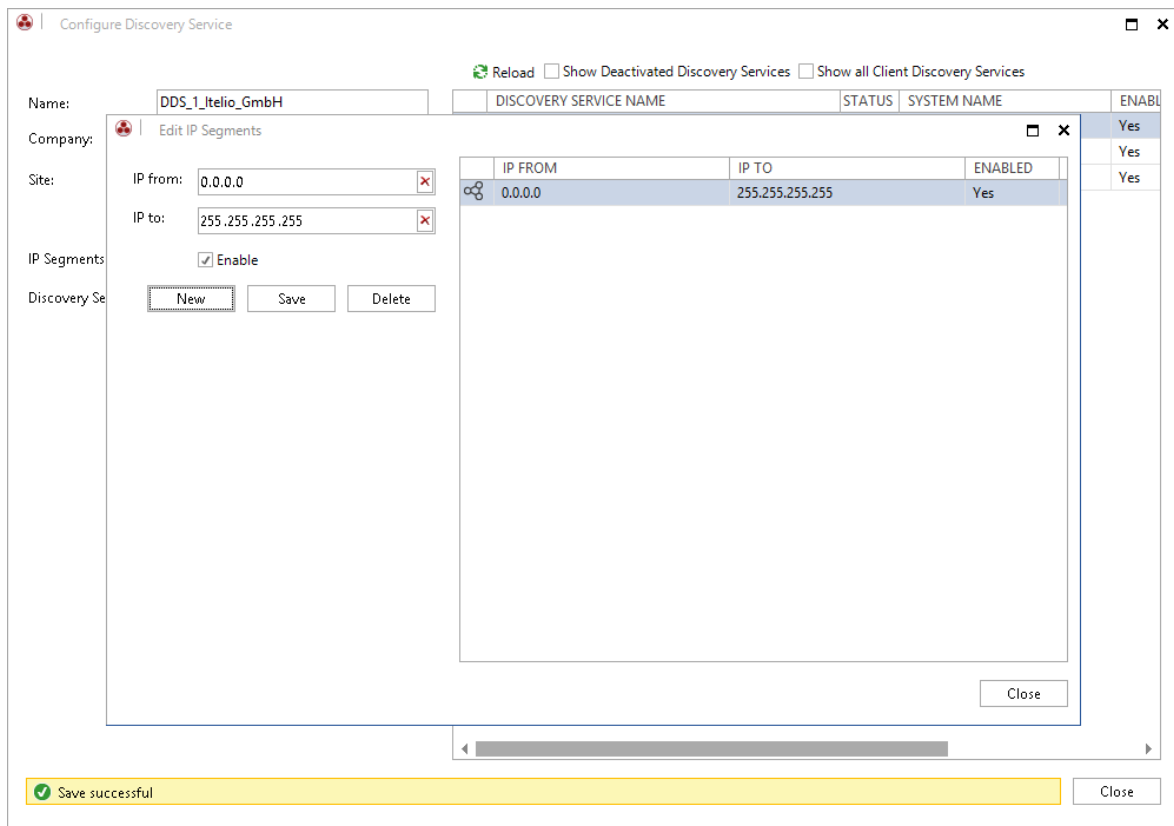


Fig. 6 – Configuring the Docusnap Discovery Service – Adding an IP Segment

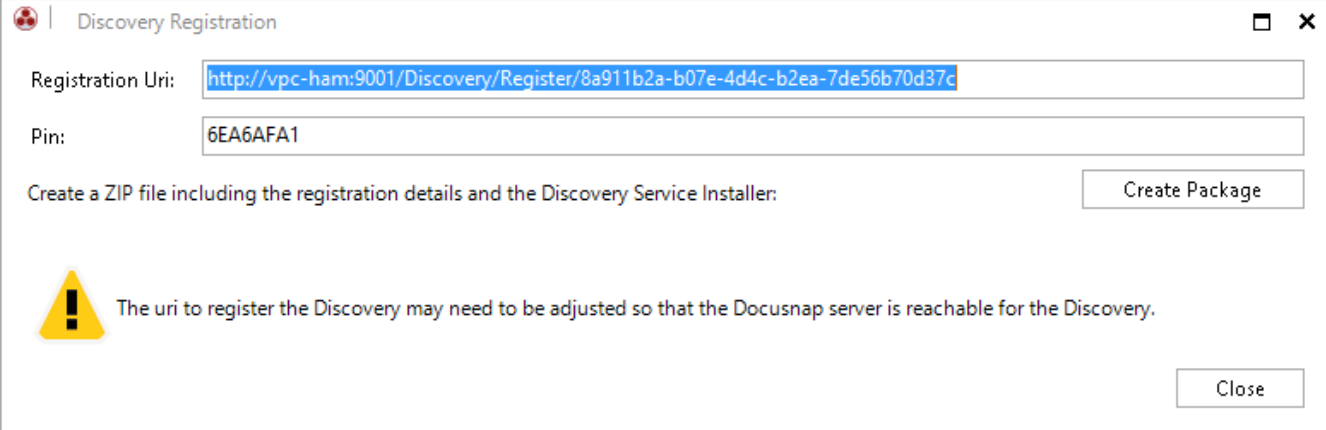
## 3.2 Creating the Installation Package

### Registration Uri (Uniform Resource Identifier)

Important: If you intend to install the Docusnap Discovery Service at a decentralized location, you need to adapt the URL accordingly. This can also be done later when you configure the Docusnap Discovery Service.

### Creating a package

Click the "Create Package" button to save the Docusnap Discovery Service setup including the pairing data in a ZIP file.



Discovery Registration

Registration Uri:

Pin:

Create a ZIP file including the registration details and the Discovery Service Installer:


 The uri to register the Discovery may need to be adjusted so that the Docusnap server is reachable for the Discovery.

Fig. 7 – Docusnap Discovery Service – Creating an installation package

## 4. Installing and Configuring the Docusnap Discovery Service

To use the Docusnap Discovery Service at a remote location, you need to install this service on a system at this location. The service will then transmit the inventoried data to the central Docusnap installation.

### 4.1 Installation

The installation package created in section 3.2 includes two files:

1. DocusnapDiscoverySetup.exe
2. RegistrationData.xml

Double-click the DocusnapDiscoverySetup.exe file to start the installation of the Discovery Service.

Please read the End-User License Agreement. Accept it to proceed with the installation.

In the Destination Folder screen, specify the path for your Docusnap installation.

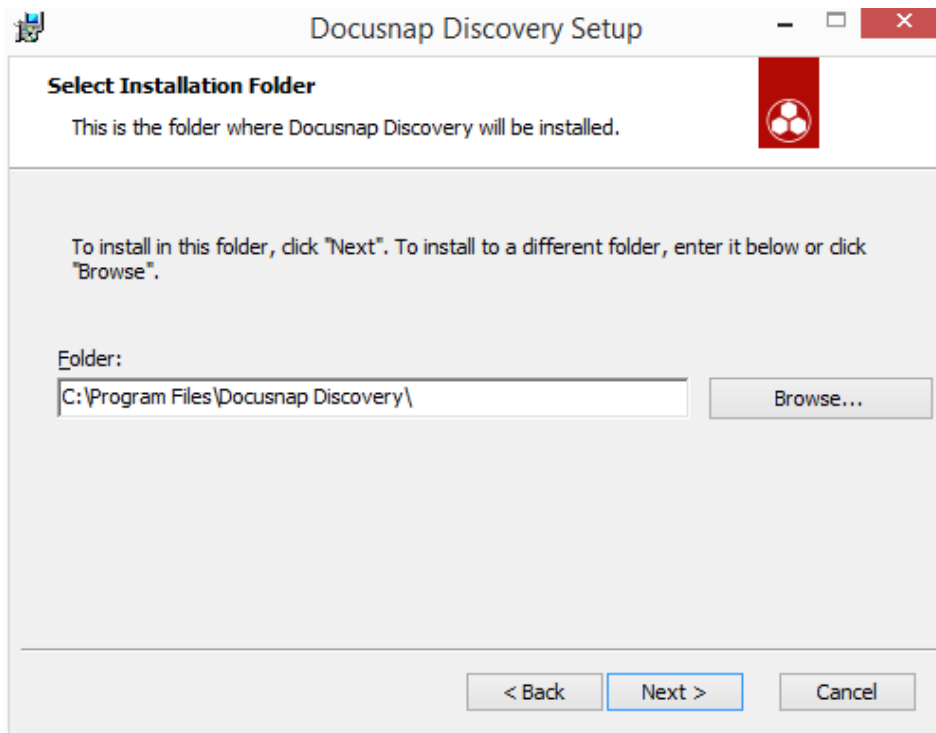


Fig. 8 – Docusnap Discovery Service – Installation – Selecting the installation directory

Click Next to start the installation process.

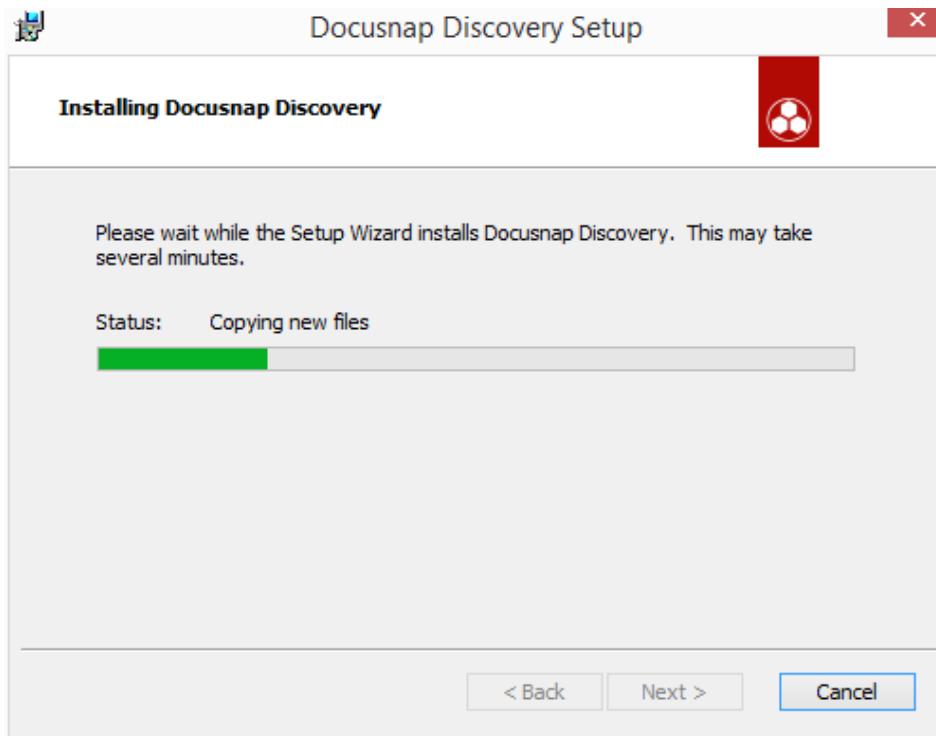


Fig. 9 – Docusnap Discovery Service – Installation – Installation progress

## 4.2 Configuring the Connection

Once the installation is complete, the Docusnap Discovery Service configuration dialog opens. Based on the RegistrationData.xml file, which is part of the installation package, the registration Uri and the 8-digit PIN are stored automatically.

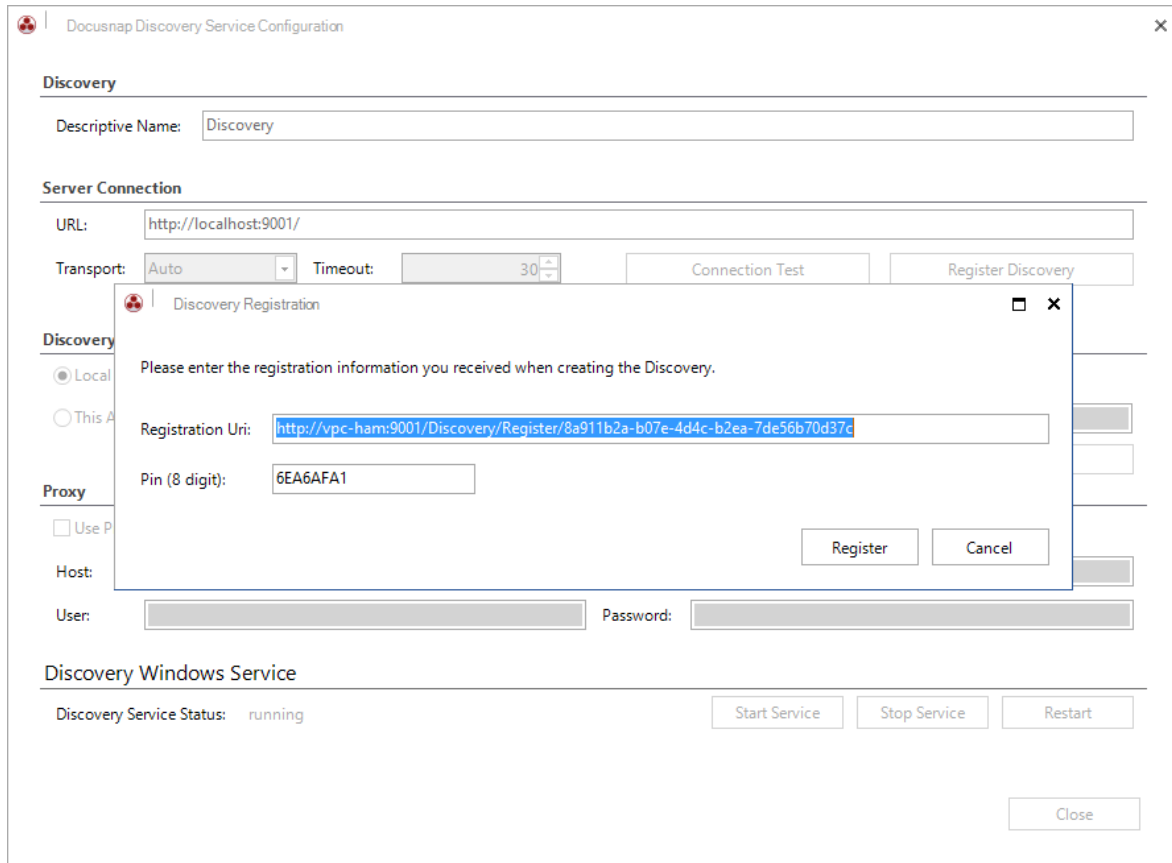


Fig. 10 - Docusnap Discovery Service - Configuration – Discovery registration

Click the Register button to register the Discovery Service with the central Docusnap installation.

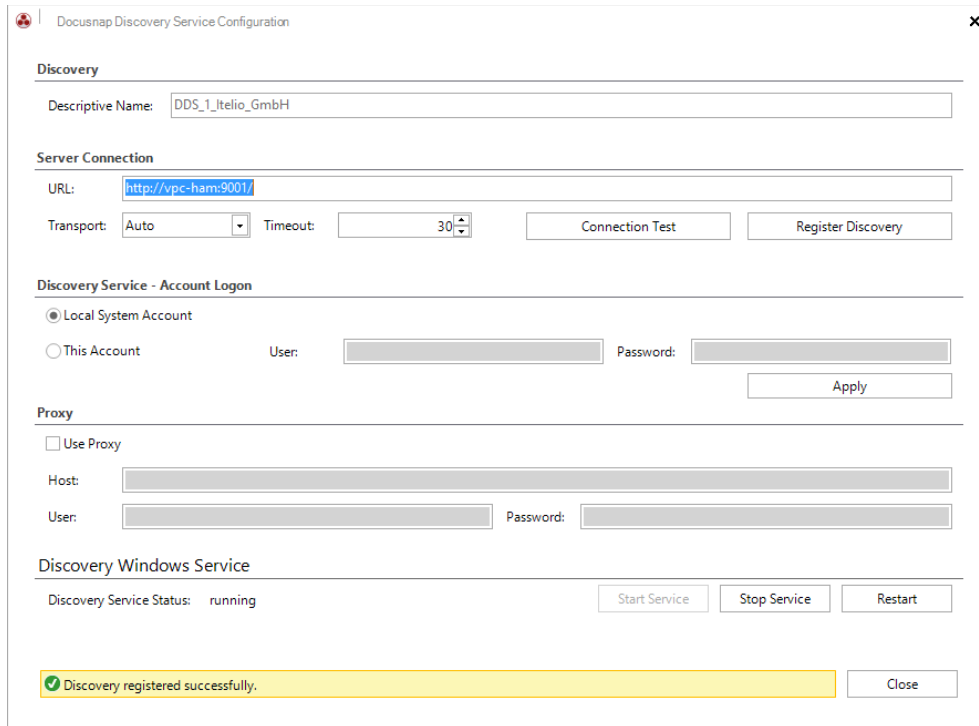


Fig. 11 – DocuSnap Discovery Service – Configuration – Successful registration

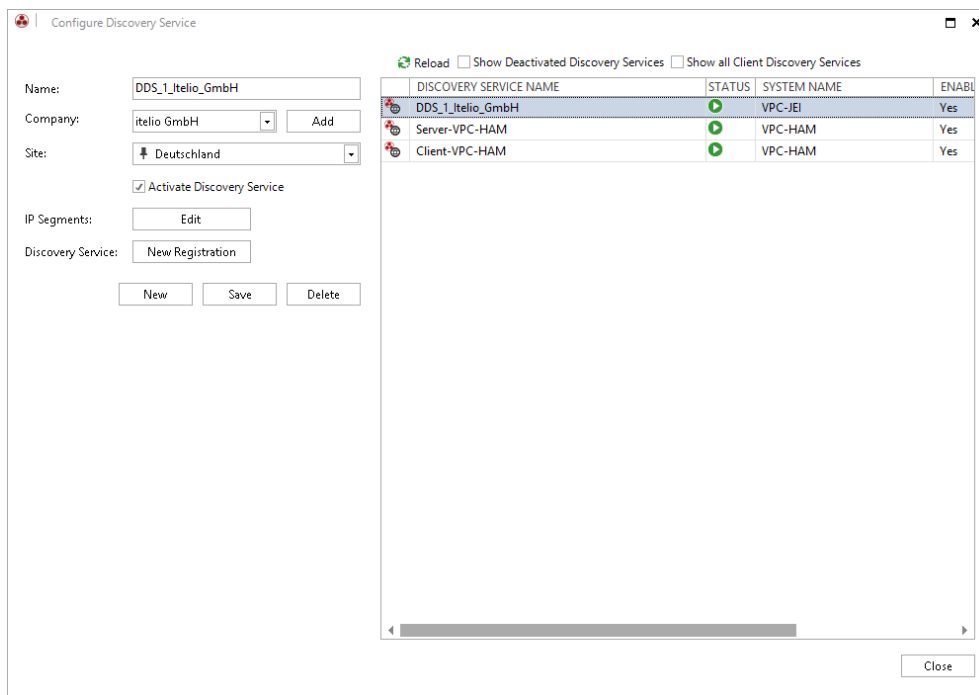


Fig. 12 – DocuSnap Discovery Service – Installation/Configuration - Completion

The Discovery Service has been set up successfully if the dialog is displayed as shown in Fig. 12. Now, you can use the Discovery Service for your inventory jobs.

### 4.3 Docusnap Discovery Services Updates

The Docusnap Discovery Service will be updated automatically. During an update of Docusnap X, the files required for the Discovery Service will be replaced automatically.

## LIST OF FIGURES

FIG. 1 – DOCUSNAP DISCOVERY SERVICE – OVERVIEW OF THE WORKING PRINCIPLE .....	4
FIG. 2 – PREREQUISITES FOR USING THE DOCUSNAP DISCOVERY SERVICE – DOCUSNAP SERVER CONFIGURATION .	6
FIG. 3 - PREREQUISITES FOR USING THE DOCUSNAP DISCOVERY SERVICES – CHECKING THE DOCUSNAP SERVER API.....	6
FIG. 4 – CONFIGURING THE DOCUSNAP DISCOVERY SERVICE.....	7
FIG. 5 – CONFIGURING THE DOCUSNAP DISCOVERY SERVICE – CREATING A NEW DISCOVERY SERVICE .....	8
FIG. 6 – CONFIGURING THE DOCUSNAP DISCOVERY SERVICE – ADDING AN IP SEGMENT .....	9
FIG. 7 – DOCUSNAP DISCOVERY SERVICE – CREATING AN INSTALLATION PACKAGE .....	10
FIG. 8 – DOCUSNAP DISCOVERY SERVICE – INSTALLATION – SELECTING THE INSTALLATION DIRECTORY .....	11
FIG. 9 – DOCUSNAP DISCOVERY SERVICE – INSTALLATION – INSTALLATION PROGRESS .....	12
FIG. 10 - DOCUSNAP DISCOVERY SERVICE - CONFIGURATION – DISCOVERY REGISTRATION .....	13
FIG. 11 – DOCUSNAP DISCOVERY SERVICE – CONFIGURATION – SUCCESSFUL REGISTRATION.....	14
FIG. 12 – DOCUSNAP DISCOVERY SERVICE – INSTALLATION/CONFIGURATION - COMPLETION .....	14



## VERSION HISTORY

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<b>Date</b>	<b>Description</b>
September 02, 2016	Screenshots edited "Docusnap Discovery Services Updates" subsection added

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