

# Docusnap X – Docusnap Web

Installing and Customizing Docusnap Web



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# 1. Introduction

In Docusnap X, it is possible to obtain read-access to the data in your Docusnap database and to create plans and reports using a web browser on any mobile terminal device.

### 1.1 Overview of the Topics in this HowTo Document – Docusnap Web

- Chapter 2 Automatic and manual installation of Docusnap Web
- Section 3 Best practice: setup of the web server ports and the Docusnap Server API
- Chapter 4 Managing user access to Docusnap Web

#### 1.2 Docusnap Web Installation – Prerequisites

• Docusnap must have been installed and configured completely

The procedures are described in a separate HowTo document called "Docusnap X Installation and Configuration" that is available for download in the <u>HowTo area</u> of our website.

• Configuration of the Docusnap Server service

- For the installation of Docusnap Web, at least Windows 8 / 2012 or higher is required!



# 1.3 The Architecture of Docusnap Web

You need to install an IIS web server on the Docusnap system and create a static website. This website connects to the Docusnap Server service to access your Docusnap database. In the browser, you can query the desired contents from the database and view them on your mobile device.



Fig. 1 – Overview of the Docusnap Web architecture

**Important:** The static website can only be viewed in the browser if a special port has been opened for access to the IIS web server. Another port is required to access the Docusnap Server API. Information from the Docusnap database will be loaded into the browser using this interface.

Make sure that the Docusnap web devices are able to access the Docusnap main system using these ports!

The default port for the IIS web server is 8181, the Docusnap Server API is by default accessed via port 9001. Chapter 3 explains how you can change these ports to port 80 (http) and port 443 (https).



# 2. Installing Docusnap Web

### 2.1 Installing Docusnap Web – Automatic Installation

Once the basic installation of Docusnap X is complete, a configuration dialog opens *when you start Docusnap X for the first time*. If you select "Install Docusnap Web", the system automatically installs all IIS components and creates the Docusnap website that will be accessible by anonymous users via port 8181.

For this installation type, *no additional steps* are required. This means that a default installation of Docusnap Web without any additional steps is performed.

Options	- 8	×
1	2	-
Activation	Start Options	
Installation & Configuration		
🗹 Configure Docusnap Client		
Configure Docusnap Server		
🗹 Install Docusnap Web		
Start Options		-
Docusnap Quickstart (Only the Docusnap Client is configured)		
	<u>N</u> ext Cancel	

Fig. 2 – Docusnap X , first start, configuration wizard



# 2.2 Installing Docusnap Web – Manual Installation

If you did not select the *Install Docusnap Web* option when starting Docusnap X for the first time, you can perform the installation later on. To do so, follow the steps described below.

#### 2.2.1 Installing Docusnap Web – Manual Installation – Installation Procedure

The *DocusnapWebSetup.exe* setup file resides in the Setup subdirectory of the Docusnap X program directory.



Fig. 3 – Setup file location in the file system



The following figure shows the steps of the setup dialog. The installation of the IIS components and the creation of the Docusnap website are performed in the background. The installation might take some minutes.

對 Docusnap X Setup — 二 X	Docusnap X Setup     Ocusnap X Setup     Ocusnap X Setup     Docusnap X Setup     Ocusnap X Setup
Welcome to the Docusnap X Setup The setup will install Docusnap X on your computer. Click Next to continue or Cancel to exit.	SOFTWARE LICENSEAGREEMENT  In consideration for your use of the software and any updates, customizations and/or enhancements, entitled Docusnap ("Software") provided by itelio GmbH, Franz-Larcher-Straße 4, 83088 Kiefersfelden, Germany ("Licensor"), you ("User") agree to the following terms and conditions. If you do not agree to these terms, you may not install the software and you must return the package to your point of purchase immediately for a refund. "Software" shall mean computer programs in Object Code, their documentation in printed form or as a common used data type and other associated written material, the legal owner of which is Itelio GmbH, or which Itelio GmbH may license.
Back Next Cancel	Back Next Cancel

Bocusnap X Setup −  ×     Destination Folder     Where would you like Docusnap X to be installed?	Ready to install Docusnap X
Install Docusnap Xto: C:\Program Files\Docusnap X\	Click Install to begin the installation. Click Back to review or change any of your installation settings. Click Cancel to exit.
Qhange	
Back Next Cancel	Back Install Cancel

Fig. 4 – Docusnap Web setup – Installation steps



# 2.3 Docusnap Web – Logging On for the First Time

The Docusnap Web login dialog is displayed in your browser. Docusnap Web is called locally using the following URL: http://localhost:8181

D DWC	×	1		×
← → C () localhost:8	3181		☆	]:
	Docusnap			
	Docustian Server LIRI			
	nttp://vPC-install-X:9001			
	Authentication Scheme			
	Anonymous 👻			
	Company			
	itelio GmbH			
	START			
	SIAKI			

Fig. 5 – Docusnap Web login dialog

In the login dialog, you can specify the Docusnap Server from which the data will be retrieved. Depending on the authentication scheme, you will be prompted to enter your credentials and specify the desired company (tenant).

In the *Docusnap Server URL* field, specify the protocol to be used (http or https) and the port that must be open for accessing the Docusnap Server API.

If no customizations have been made, the Docusnap Server API will be reached by using the following URL:

http://HOSTNAME:9001

To determine the URL of the server API, select *General Options - Connections - Server API Connection* in Docusnap.



<u>ج</u>	- 🗆 ×	
Options Options		
Help & Support	Options	
T Management	interar configuration of Docustrap like Database Settings, License, opuate, Oser Language	
Quick Support		
SelverAL	ICENSING DATABASE CONNECTIONS	
B Update Update Opt	ions	
Close     Check for	Updates on Startup	
Downloa	d both Docusnap Versions (x64 and x86)	
Timeout:	s Seconds	
Proxy Serve	r	
Address	Ports Sasa	
User:	Password:	
Server API	oppertion	
✓ Enable Se	rver API Connection	_
URL:	http://localhost:9001/	
Transport:	Auto Timeout: 30 👗 Seconds Test Connecti	ion
		ncel

Fig. 6 – Docusnap Server API - Determining the URL



## 3. Optional Step: Customizing the Ports for the Web Server and the Docusnap Server API

### 3.1 Introduction

In some production environments, port 8181 (IIS access – static website) and port 9001 (access to the Docusnap Server API) might not be enabled. This optional chapter describes how to change the access to the Docusnap IIS web server to port 80 (http) and the access to the Docusnap Server API to port 443 (https) based on the default configuration. Communicating via these ports should be possible in most environments. In addition, querying the database via the browser even increases the security as the data transferred will be encrypted through the use of https.

#### 3.2 Configuring the IIS (Static Website) Access with http - Port 80

Once Docusnap has been installed successfully, an ISS server resides on the system that hosts two websites:

- Default Web Site (port 80)
- Docusnap Web (port 8181)

File View Help		
Connections           VPC-INSTALL-X (VPC-INSTALL-X\DSX)           Application Pools	Filter:     • • • • • • • • • • • • • • • • • • •	Actions Explore Edit Permissions Edit Site
<ul> <li>Gittes</li> <li>Default Web Site</li> <li>Docusnap Web</li> </ul>	ASP.NET	Bindings Basic Settings View Applications View Virtual Directories
	Application Connection Machine Key Pages and Controls	Manage Website
	Authentic Compression Default Directory Error Pages Handler Mappings Respon	Browse Website Browse :8181 (http) Advanced Settings Configure
	Logging MIME Types Modules Output Request SSL Settings WebDAV Caching Filtering Authori	Limits
	Configurat Editor	





In the first step, right-click *Default Web Site – Edit Bindings* and change the port from 80 to 81. In the next step, configure Docusnap Web to port 80 which is now available:



Fig. 8 – IIS Manager – Starting the Edit Bindings dialog







These changes will only become effective after a restart of the IIS Server. This can be done in the right panel of the IIS Manager under *Actions – Manage Website*.



Fig. 10 - Restarting the IIS Server

As an alternative, open a CMD console with administrator rights and enter the *iisreset* command.



Fig. 11 - iisreset



#### Now, the Docusnap Web client can be called by entering *http://hostname*.

)WC	×		
C 🛈 loc	alhost		1
	Docusnap		
	Docusnap Server URL		
	http://VPC-Install-X:9001		
	Authentication Scheme		
	Anonymous	<b>~</b>	
	Company		
	Company		
	itelio GmbH	<b>•</b>	
		START	

#### Fig. 12 – Opening the web client after the change



# 3.4 Configuring the Docusnap Server API Access with https – Port 443

When *changing from http to https*, a certificate is required for encryption. This example shows how to create a self-signed certificate in Docusnap and how to configure the Docusnap Server API for https using port 443. These steps will be performed in the Docusnap Server Configuration dialog.

Only the settings in step 4 – Server API need to be changed.

						- 🗆 ×		
Options								
Options	Comment Operations							
Help & Support	Specify General Configuration of	Docusnap like Database Se	ettings, License, Update,	User Language				
💾 Management	Inventory	Configuration						- 🗆 ×
Quick Support	Specify Product and							
	Documentation	-(1)	2		(3)	4	(	5
😸 Update	Sei	rver Start Settings	Server Database	e Server	Mail Settings	Server API	Serve	Settings
⊠ Close	Permission Analysis Specify Configuratio		1.00					
म	License Manageme	Discovery Service and W	ebclient			- 60		
	Settings for License Schen	ne:	Ohttp	https	Select Certificate			
	Docusnap Server Configuration of the	al Host Name (optional):				Port:		9001
	Docusnan Discover		https://*:9001/					
	Configuration of the Authe	ntication Scheme (only re	levant if user manager	nent is enabled)				
Other	Bas	sic Authentication (https is	recommended)					
	Inte	egrated Windows Authentic	cation					
	Configuration, Mana And	onymous Authentication (A	Attention: this option gra	nts everyone full ac	cess)			
E	Report Difference							
	Check and Display o							
	A If n	io certificate has been selec	ted, a new self-signed c	ertificate is created.		Back	Next	Cancel

Fig. 13 – Docusnap Server Configuration – Server API

Here, configure the following settings:

- Schema
  - o Access via http or https
- Select Certificate if you set https as the schema.
  - You can select an existing certificate.
  - If no certificate exists, the system will create a new, self-signed certificate during the configuration process.
- Authentication Scheme
  - o Authentication for accessing Docusnap Web
  - o For details, see the next chapter.



Once you have configured all properties and completed the configuration, the certificate will be installed. Confirm this by clicking Yes.

Security	Warning	$\times$
	You are about to install a certificate from a certification authority (CA) claiming to represent:	
	Docusnap Root CA	
	Windows cannot validate that the certificate is actually from "Docusnap Root CA". You should confirm its origin by contacting "Docusnap Root CA". The following number will assist you in this process:	
	Thumbprint (sha1): 68C01320 51F83BDB 7F6BB9B4 C54F54E6 C8FFDD47	
	Warning: If you install this root certificate, Windows will automatically trust any certificate issued by this CA. Installing a certificate with an unconfirmed thumbprint is a security risk. If you click "Yes" you acknowledge this risk.	
	Do you want to install this certificate?	
	Yes No	

Fig. 14 - Operating system security alert - Installation of the certificate

#### 3.4.1 Customizing the Server API Connection

Due to the change made to the Server API authentication scheme, you must customize the Server API connection URL in the next step to match the authentication scheme.

Click *General Options – Connections – Server API Connection* to change this setting. You can test the connection by clicking the **Connection Test** button.

E		-	□ ×
Ontione	Options		
Help & Support	General Options Specify General Configuration of Docusnap like Database Settings, License, Update, User Language		251
Management     Quick Support			
License Information	SENERAL LICENSING DATABASE CONNECTIONS		
🚱 Update	Update Options		
I Close	Check for Updates on Startup		
	Download both Docusnap Versions (x64 and x86)		
	Timeout: 3 📮 Seconds		
	Proxy Server		
	Address: Port: 8080		
	User: Password:		
	Server API Connection		
	URL: https://localhost:443/		
	Transport: Auto		
	V Test connection succeeded.		





When you close the dialog, the Docusnap status bar will indicate that two Discovery services are active and connected via https. This completes the transition to https (port 443). In some cases, you might need to restart the Docusnap Server service.

Docusnap X      Docusnap INVENTORY DOCUMENTS SCH	HEDULING EXTRAS		- 🗆 ×			
Jobs PC Configuration IPI Server Status Notification Define Notifications Docusnap Server	Configure Discovery Service Package Discovery Service Docusnap Connect					
🐿 New 🔻 💾 Save 🗶 Delete 🔎 👰 🛛	Information Data Editor Analysis Additional Inform	nation	PNew Element - X Delete 🖋 Edit			
🕀 📕 itelio GmbH			NAME TYPE			
	Infrastructure	Number of Active Directory User and	<sup>d</sup> Comments			
			<sup>d</sup> Contracts			
	No Date	No. Data				
	NO Data	NO Data	<sup>⊿</sup> Tasks			
	Exchange Mailbox Sizes (in kB)	Scheduled Jobs of the next 7 days				
		NAME TYPE CREATIO				
	No Data					
		я — — — — — — — — — — — — — — — — — — —	Client-VPC-I	nstall-X		
Inventory Documentation Li	icense Management IT Security			Instâll-X		



### 3.5 Docusnap Web – Testing the Connection with a Different System

Now, test the changes you made by using a different system in your network. This Windows system will be able to resolve the host name of the Docusnap computer. Enter the appropriate URL in the "Docusnap Server URL" field. The https protocol will be used automatically. Port 443 is the default https port. So there is no need to specify it explicitly.

When calling Docusnap Web, you must accept the self-signed Docusnap Server certificate. This step caused problems in the Firefox browser. All other tested browsers accepted the certificate in our tests:





Fig. 17 – Docusnap Web – Connection test



A security alert is displayed. Click Yes to confirm. When you close this dialog, the Docusnap Web Client starts.

Depending on the certificate used to establish the https connection to the Docusnap Server API, a security alert might be displayed.

		- 🗆 X
🗲 🕞 🧟 http://vpc-ham/		슈 ☆ 🛱 🙂
	Docusnan	
	Docusitap	
	Docusnap Server UI Security Alert X	
	The identity of this web site or the integrity of this connection	[
	https://VPC-HAM	
	▲ The security certificate was issued by a company you have	
	Authentifizierungs s not chosen to trust. View the certificate to determine whether you want to trust the certifying authority.	
	The security certificate date is valid.	0
	Firma	
	Do you want to proceed?	
		0
	Yes No View Certificate	
	ST/	ART
		-

Fig. 18 – Operating system security alert



# 4. Managing User Access to Docusnap Web

As explained above, the authentication scheme for accessing Docusnap Web can be changed during the configuration of the Docusnap Server (Server API). This requires that User Management has been enabled. Otherwise, Docusnap Web will be accessed using *Anonymous Authentication* – this means that *everybody* would have access to the Docusnap Web Client.

#### 4.1 Enabling User Management

To switch to the Docusnap User Management, click Management – General.

۲	Docusnap Management (Configura	tion Management and Custor	nization of Do	cusnan)						×
Options	Close Management GENERAL	INVENTORY CUSTO	MIZING	IT ASSETS	DIAGRA	MS IT CORRELA	TIONS	LICENSE MANAGEMENT	_	
Help & Support Management Quick Support	Designs Layout Permissions	G Management Tools	O ₪ □ መ ¶ Additiona	량 Packag	ges 🛔	Export Package Import Package Connect	Site Types Sites	© Color Scheme     © Element Properties     IT Documentation Framework		
2 License Information	Docusnap Users									
S Update	Domain User / Group:					Administration Customizing				
	Allow Access to Web Client	· (Outing B				IT Documentatio	n			
	Password for basic Authentication only	(optional);				License Manager	nent			
	Password:					Permission Analy	rsis			
	Password Confirmation:					User Managemer	nt			
	<u>N</u> ew <u>D</u> elete S	ave				View				
	WEBACCESS	DOMAIN USER		DESCRIPT						

Fig. 19 – User Management

User Management allows you to manage the following:

- Domain User / Group either from the current domain or the local system
- Description
- Allow Access to Web Client
- Password for Basic Authentication only
- Docusnap Roles

For further information on the Docusnap User Management functionality, please refer to the online manual



If you select *Integrated Windows Authentication* or the *Basic Authentication*, make sure to create the corresponding users or groups in User Management and enable the *Allow Access to Web Client* checkbox.

The Basic Authentication scheme requires you to enter a password for accessing the Web Client. With the Integrated Windows Authentication scheme, no password is required.

If you want to add users that should have access to the Web Client only, there is no need to assign them a role.

*IMPORTANT*: Users who are supposed to work with the Docusnap Client must be assigned corresponding user roles!

									)) <b>-</b>	
	usnap Management (Configurati	ion, Management and Custo	mization of Docus	snap)	DIACRAN		TIONS		- 🗆	×
Help & Support	Docusnap User     Docusnap Roles     Permission Categories     Permissions	Management Tools     Management Tools     Management Tools     Tools	C D Additiona	Package Edit Pac	es 🏦 kage 🛡 ocusnap Co	Export Package Import Package	Site Types Sites	Clerinse MARAGEMENT  Color Scheme  Element Properties  IT Documentation Framework		
<ul> <li>Update</li> <li>Close</li> <li>Descripti</li> <li>Allow</li> <li>Password</li> <li>Password</li> <li>Password</li> <li>Wew</li> <li>Wew</li> <li>Wew</li> <li>Wew</li> <li>Wew</li> </ul>	Jser / Group: vpc-install- on: Access to Web Client for Basic Authentication only i: Confirmation: Delete Sa EBACCESS lew entry>	x\administrator (Optional): ve DOMAIN USER		SCRIPT		Administration Customizing Inventory IT Documentatio IT Relations License Managere Organization Permission Analy User Managemen View	in ment y/sis nt			

Fig. 20 – Adding users when using the Integrated Windows Authentication scheme



# 4.2 Configuring the Authentication Scheme for Docusnap Web

To change the authentication scheme for the access to the Web Client, open the Docusnap Server Configuration dialog – step 4 - Server API.

۲				;	×	
Options	Options					
Help & Support	General Options Specify General Configuration	Server Configuration			1	- 🗆 ×
🖽 Management 😇 Quick Support	Specify Product and Network S		2	3		
	<b>Documentation</b> Configuration Settings for Crea	Server Start Settings	Server Database	Server Mail Settings	Server API	Server Settings
⊠ Close	Permission Analysis Specify Configuration for Inven	Use Discovery Service and V	http	Select Certificate		
	License Management Settings for License Manageme	External Host Name (optional):			Port:	443 🛓
	Docusnap Server Configuration of the Docusnap	Authentication Scheme (only r	https://*:443/ elevant if user management is e	nabled)		
	Docusnap Discovery Service Configuration of the Docusnap	Basic Authentication (https in	s recommended)			
	Other	<ul> <li>Integrated Windows Authent</li> <li>Anonymous Authentication</li> </ul>	ication Attention: this option grants ever	yone full access)		
	Docusnap Management Configuration, Management ar					
	Report Differences Check and Display of Reports f					
					Back	<u>N</u> ext Cancel

Fig. 21 – Selecting the authentication scheme

#### 4.2.1 Anonymous Authentication

If you select this authentication scheme, no authentication will be performed by the IIS. Each user who is able to reach this system via the network can open the Docusnap Web Client.

#### 4.2.2 Basic Authentication

If you select this authentication scheme, users can access Docusnap Web only after having entered their credentials (i.e. user name and password). Since this data is transmitted as plain text, https should be configured for the Docusnap Server API when using this authentication scheme. Use this scheme in the following cases:

- Anonymous Authentication is not desired
- Integrated Windows Authentication is not possible (e.g. the system is a member of a work group or is located outside the Intranet)

#### 4.2.3 Integrated Windows Authentication

With this scheme, the system checks whether the logged-on domain or system user is enabled in the Docusnap User Management and whether that user has the permission to access Docusnap Web. For opening Docusnap Web, no credentials need to be entered here. This authentication scheme is the most complex one, but ensures maximum security. Restricting the access to Docusnap in this way was already possible in the previous Docusnap versions. In Docusnap X, this functionality was extended to include Docusnap Web.



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# **VERSION HISTORY**

Date	Description
August 05, 2016	Version 1.0 – Initial draft
August 08, 2016	Version 1.1 – Port customization and certificate handling sections added
August 09, 2016	Version 1.2 – Corrections (resulting from feedback from Development)
September 02, 2016	Version 1.3 – Adaptations to RTM version of Docusnap X



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