

Docusnap Web

Configuring a Company-Specific Access to Docusnap Web



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1. Introduction

With Docusnap it is possible to access the Docusnap database via browser. This allows database access (with read permission) and the output of plans and reports for any employee or customer without the need to install a Docusnap client.

Please note that client-specific access to the database, both via the client and via Docusnap Web, may incur license costs for the Microsoft SQL Server and this must be checked in advance.

Docusnap uses a role-based user administration that enables you to restrict the data to be accessed by users and groups to the desired level.

This HowTo shows how to restrict access to Docusnap Web using the user administration.

1.1 Installing and Configuring Docusnap Web

As it is assumed that Docusnap Web has already been installed and fully configured, the installation and configuration of the application will not be discussed in this HowTo document.

A corresponding HowTo, which describes the installation and configuration, can be found in our Knowledge Base.

1.2 Application Example – Restricting the Access to Docusnap Web

This example describes how to ensure for a Docusnap environment with two clients that Client A and Client B only have access to their own Docusnap data.



2. Docusnap Web – Authentication Scheme

2.1 Configuring the Authentication Scheme

In step four of the Docusnap Server configuration wizard, *Server API*, you can specify the valid authentication methods for accessing Docusnap Web:

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O iscovery	Server Configuration – 🗆 🗙	Docusnap Discovery Service Configuration Docusnap Server Configuration Server Status
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Documentation	Server Start Settings Server Database Server Mail Settings Server API Server Settings	
E IT Security	Scheme: Inttps (self-signed certificate) Inttps (from certificate store) Select Certificate External Hostname (optional): Port: 9001 Proxy	
License Management	http://*:9001/	Execution Date Description Number Succe Number Failed Suc 24/04/2020 Server-VPC-S 1 0 100 08/04/2020 Server-VPC-S 2 0 100
L All Jobs	Authentication Scheme (only relevant if user management is enabled)	08/04/2020 Server-VPC-S 1 0 100 08/04/2020 Server-VPC-S 1 0 100
¢ [♥]	☑ Integrated Windows Authentication	h 24/04/2020 Server-VPC-S 2 0 100 -V 08/04/2020 Server-VPC-S 0 1 0%
	Only NTLM Anonymous Authentication (Attention: this option grants everyone full access)	08/04/2020 Server-VPC-S 7 0 10(v
Infrastructure	Docusnap User Permissions	
Management	Debugging Docusnap Web	
	Enable Logging	
	Logging Path: Max. Age: 00	
	Back Next Cancel	

Figure 1 – Configuring the authentication scheme

2.2 Anonymous Authentication

If you select **Anonymous Authentication**, all other authentication methods are disabled automatically. There will be no permission checks, i.e. every user has unlimited access to Docusnap Web. This is especially worrisome if the server API and thus Docusnap Web is accessible from outside, as you use Docusnap Discovery Services for inventorying decentralized environments.

2.3 Basic Authentication

Basic Authentication means that the user must enter his/her username and password each time he/she wants to access Docusnap Web. The user password is sent to Docusnap Web as plain text, i.e. in unencrypted form.

With this method, you can grant users outside your own domain access to Docusnap Web. In productive use, however, it is strongly recommended, to use HTTPS for the access to Docusnap Web to make sure that the password is encrypted before transmission.



2.4 Integrated Windows Authentication

This method is recommended to grant users within your own domain access to Docusnap Web. ADS security groups and users as well as local users (not recommended) can be granted access directly in Docusnap. In contrast to the Basic Authentication method, Integrated Windows Authentication uses the ADS for user account management.

Please note that Single Sign-On cannot be guaranteed in every environment.

2.5 Combined Use of Integrated Windows Authentication & Basic Authentication

It is possible to use both methods in a combined authentication scheme. This way, you can set up easy access for internal users and controlled access for external users.



3. Docusnap user management

This chapter briefly explains the Docusnap User Management feature on which the content of this HowTo document is based. Only the functionality required for this example will be discussed. You can find further information in our Knowledge Base in the HowTo: Docusnap User Management.

3.1 User Management Overview

By default, User Management is disabled, i.e. every user can access all features and data of the Docusnap database. Creating the first user automatically enables the User Management feature. From this time on, users can only access features for which they have explicitly been granted permission. Access to data is still unlimited at this point, but once you have set permissions to specific object classes or objects, permission checks will be carried out.

You can open the Docusnap Roles and Docusnap User dialogs from the General tab of the Docusnap Management:

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Discovery	🚱 Docusna	p 11 - Management (Configuring,	Customizing and Extending of Docu	snap)		- 🗆 X
Inventory	General	GENERAL	usnap Roles 🛛 Permission Categories 🛛	Management Tools	Site Types Color Scheme	: -
Documentation	Inventory	Docusnap Users				4 Þ
	Customizing	Domain User / Group:		Ad	dministration ponnect	
۲ License	伯 IT Assets	Allow Access to Docusnap Web Password for Basic Authentication only (Opt	ional):	□ ½ Cu □ ₺ Inv □ ₺ ITI	ustomizing ventory Documentation	
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Infrastructure	Ornect Legacy	<u> </u>				
management	ିର୍ଦ୍ଧ Options					
	~					
	X Close Management	4				

Figure 2 – Docusnap User Management



3.1.1 Docusnap Roles

The Docusnap User Management feature allows you to restrict the access to any user interface controls. Roles are used to make this a straightforward process. A role is a collection of access rights to the Docusnap controls. Docusnap comes with standard roles, so that you can easily limit the access for users to read-only (View role). These standard roles cannot be modified by the end customer. In this dialog, you can define additional roles to which you can freely assign any desired user permissions.

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General	GENERAL	ission Ca	tegories 🗔	Management	Tools 📮 Num	iber Servei	r Q	Site	Types 🗔 Color Sch	eme	: -
Inventory	Docusnap Roles		-	-							4 Þ
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Connect Legacy	ද් _ර MyRole	nfi	Administration	INVENTORY	Other						
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Close Management		4	Administration	INIVENITODV	Windows						

Figure 3 – Creating custom roles



3.2 Docusnap User

Open the Docusnap Users dialog to grant ADS users or ADS groups access to the Docusnap Client or to Docusnap Web. In addition, you can create new users to grant them access to Docusnap Web through the Basic Authentication method.

The access to Docusnap / Docusnap Web is managed by assigning roles. A user who has not been assigned a role cannot access the respective features or data.

Important: Make sure that you yourself or an ADS group of which you are a member is registered in the Docusnap User Management and that you or the respective ADS group have/has been assigned the Administration role. Otherwise, all controls will be grayed out when you start Docusnap the next time and you will no longer be able to use the application!

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Inventory	Docusnap Users		4 Þ				
°0	Domain User / Group: CSP-VPC-PROD01\Admin	Administration					
Customizing	Description: Administrator / User Manager	Company-A					
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Management		User Management					
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Connect Legacy							
°0							
Options							
~							
Close Management							

Figure 4 – Creating Docusnap users with the Administration role



3.3 Docusnap User Management – Object Classes and Objects

Once the Docusnap User Management feature has been enabled, you can restrict the access not only to features, but also to database data. Now, it is possible to select an item in the tree view and select additional permission settings from the context menu.

In this example, the Server DOSPDC01 was selected, and with a right-click, the Object Permissions dialog was launched. Users with the Administration role are granted full access to the Server type object class. This right will now apply to all objects of the Server type. Alternatively, it could have been assigned exclusively to the object DOSPDC01. In this case, the assignment would have no effect on the access rights of the Administration role to other objects of the Server type:



Figure 5 – Assigning access rights to Server objects to users with the Administration role



4. Configuring Docusnap Web Access Rights - Example

After this brief description of the relevant Docusnap User Management features, we will now show how they are implemented in the application example.

4.1 Requirement

You want to grant two customers (called "Company-A" and "Company-B") access to parts of your Docusnap database. You must make sure to both minimize the administrative effort and to define the permissions in such a way that both customers can only access their own data. Both must not be able to access data of the respective other company.

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License	> C Tasks	Financial Records						
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Management								

Figure 6 – Permission example – Requirement



4.2 Basic Setup of the Docusnap User Management

In this example, both Basic- and Integrated Windows Authentication will be used as the Docusnap Web authentication scheme. Docusnap User Management is enabled, and the user defined for you has been assigned the Administration and User Management role. For the access to Docusnap Web, users "Company-A" and "Company-B" have been created and set to "Basic Authentication". Both have been assigned the password "test".

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Inventory	Docusnap Users		4 ⊳					
°o	Domain User / Group: CSP-VPC-PROD01\Admin	🗹 🗞 Administration						
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ଣ	P Yes Company-A Access only for Company-A Yes	□ 𝒫 View						
Connect Legacy	P₂ Yes Company-B Access only for Company-B Yes							
	⅔ Yes CSP-VPC-PROD01\Admin Administrator / User Manager Yes							
Options								
X Close Management								

Figure 7 – Permission management – Basic settings



4.3 Testing the Basic Settings

Perform an initial connection test by logging in as the user "Company-B" (Basic Authentication). The login attempt was successful, and the user may access Docusnap Web, but currently this applies to the data of all companies:

	Docusna p'	
Authentication		
Basic		•
Company		
Company-A		•
Company-A		
Company-B		

Figure 8 – Docusnap Web access is working (user can access all companies)



4.4 Step One – General Restriction of Access Rights

In the first step, access to the Overview object type is restricted in such a way that only users with the Administration role are granted access.

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•	Inventory		Object Permissions					□ ×		
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Physical			La Repermission Analysis							
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-			Type: Overview							
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						<u>S</u> ave	e Ca	ncel		

Figure 9 – Restricting access to the Overview object type (Administration role only)

Now, the right to access the Company object type is also restricted to the Administration role:

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()	Inventory		Object Permissions					□ ×	
Discovery	📑 Windows (AD) 🎡	SNMP	Roles and Target Objects	Write	Delete	Read	Insert		🕅 Exchange Server 👉 🛛 🕞 System Groups 🟠
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inventory	··· All Wizards		🕅 Object: Company-A						
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			Type: Company						
Documentation	> Overview		Dbject: Company-A						
_	≻ 🛗 Company-A		~						
FQ	> 🏥 Company-B		Type: Company						
IT Security			Object: Company-A						
5			V						Execution Date Description Number Succe Number Failed
¥_I License			Type: Company						24/04/2020 Server-VPC-S 1 0
Management			B Object: Company-A						08/04/2020 Septer-VPC-S 2 0
5			 	_	_	_	_		00/04/2020 Server-VFC-3 2 0
Ŀ			m Type: Company						08/04/2020 Server-VPC-S 1 0
All Jobs			B Object: Company-A						08/04/2020 Server-VPC-S 1 0
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				inventoried in the	last week	n [•		

Figure 10 - Restricting access to the Company object type (Administration role only)



4.5 Testing the Changes Made in Step One

Perform a new connection test by logging in as the user "Company-B":

	Docusna p [*]	
Authentication		
Basic		-
		START
		😲 Forbidden

Figure 11 – Login attempt after access rights editing

4.5.1 Why Did the Login Attempt Fail?

Due to the permission adjustments, only users with the Administration role can access objects of the Company object class. The access rights of the users Client A and Client B have been completely removed.



4.6 Step Two – Granting Companies Access Rights to their Data

Now, a new role will be created for each user and assigned to the respective Company. Here, no controls will be assigned to the roles. The roles are only used to define access rights to customer data.

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General	GENERAL							1.		
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° _o	Role Name: Company-A		Control	Dialog	Group	Subgro		Category V	/isible	
Customizing	German Text: Company-A	80	Export Schema	Administration	CUSTOMIZING	Extenc	A	Organization		
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IT Assets	English Text: Company-A	80	Manage Obje	Administration	CUSTOMIZING	Extenc	Α	Technology - Trainees		
	New Delete Save	60	Manage Tables	Administration	CUSTOMIZING	Extenc	Α	Technology - General		
~-	Dela Marca	60	Manage Rep	Administration	CUSTOMIZING	Report	≙	Technology - Infrastr		
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¥ License	A Customizing	80	Password Typ	Administration	GENERAL	Additie				
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a	* IT Documentation	60	Edit Package	Administration	GENERAL	Docus				
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×	Real Permission Analysis		Color Scheme	Administration	GENERAL	IT Doc				
Close Management		8	Element Prop	Administration	GENERAL	IT Doc 🕶				

Figure 12 – Creating the Company-A and Company-B roles

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General	GENERAL	Management Tools 🛛 🖩 Number Server 🔍 Site Types 🖉 Color Scheme				
Inventory	Docusnap Users				•	
°	Domain User / Group:	Company-B		Administration		
Customizing	Description:	Access only for Company-B		Company-A		
<i>C</i> L	Allow Access to Docus	nap Web		✓ 𝑘 ₀ Company-B □ 𝑘 ₀ Connect		
IT Assets	Password for Basic Auther	ntication only (Optional):		Customizing		
R.	Password:	*****		□ A ^C ₀ Inventory		
Diagrams	Password Confirmation:	****		IT Documentation		
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ø	[₽] ⁄ _ℓ Yes	Company-A	Access only for Company-A	All All View		
Connect Legacy	狗 Yes	Company-B	Access only for Company-B			
Options	MY Yes	CSP-VPC-PROD01\Admin	Administrator / User Manag	er		
Close Management	•			Þ		

Figure 13 - Assigning the respective role to the user



Now, each company has been granted the required access rights. The Company-A role is granted View permission to the Company-A object. The rights for the Company-B role are assigned accordingly. Please note that the rights only refer to a object, not to the entire object class!

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	741 1120103		Dbject: Company-B							
G			✓ □ 4 Company-A	_	_	_	_			
Documentation	Aguarian		Type: Company							
	> Overview		Bi Object: Company-B							
R	> m Company-A		✓ ☑ R ₆ Company-B							
IT Security	. We company-b		Object: Company-B							
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ģ_1			Type: Company						Execution Date Description	Number Succe Number Pailed
License			Diject: Company-B							
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Management			V 8 License Management							
management			Type: Company							
			Object: Company-B							
			~				_	-		
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						[¥			

Figure 14 – Granting permissions to the new company roles



4.7 Testing the Changes Made in Step Two

Now, user "Company-B" can only access the data of the Company-B object.

	Docusnap [°]	
Authentication		
Basic		•
		START

Figure 15 – Successful login after access rights editing

4.8 Next Steps

If you later create a new user, say "Company-C", with Basic Authentication, this user will by default have no permission to access the Docusnap database. Only after you have created a role for this user and set corresponding rights to an object of the Company type, the new user will be able to access the data. The permissions granted to the two existing users do not need to be adapted in this case.



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VERSION HISTORY

Date	Description
October 11, 2016	Version 1.0 – This description applies to Docusnap version 10.0.464.11.
October 31, 2016	Version 1.01 – Screenshots have been updated – Version 10.0.488.1
October 19, 2018	Version 1.1 – Screenshots have been updated – Version 10.0.1183.4
October 24, 2018	Version 1.2 – Screenshots have been updated – 1. Introduction: License notice has been added
May 04, 2020	Version 2.0 - Revision of the HowTos for Docusnap 11

