Docusnap X – Docusnap Web

Installing and Customizing Docusnap Web

TITLE	Docusnap X – Docusnap Web
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1. Introduction

In Docusnap X, you can use a browser on any device to read most of the data in your Docusnap database and create plans and reports.

The June 2018 release saw the introduction of Docusnap Webserver. Until now, you had to install the Microsoft Internet Information Server (IIS) along with Docusnap Web. Thanks to Docusnap Webserver, this is no longer necessary. This HowTo document mainly discusses the use of Docusnap Webserver.

Please note for future planning that the development of Docusnap Web IIS has been discontinued so that it will no longer be available in Docusnap in the medium term.

1.1 Installation of Docusnap – preparation

Perform a basic Docusnap installation. In our HowTo document called Docusnap X – Installation and Configuration, you will find a detailed description of the installation and configuration of Docusnap X including the database deployment.

For a smooth installation and operation of Docusnap Web, we recommend the use of Windows 8 / Windows 2012 or higher.

1.2 Note on DocusnapWebSetup.exe

Legacy Docusnap X installations provided an option to run Docusnap Server without installing a webserver. The separate *DocusnapWebSetup.exe* program allowed the installation of Docusnap Web at a later time.

In current Docusnap X versions, Docusnap Webserver is automatically installed when you configure the Docusnap Server. This means that executing *DocusnapWebSetup.exe* is no longer necessary.

1.3 Docusnap webserver – current architecture

The diagram below shows the architecture of the Docusnap Webserver. It only requires a single port; the installation of the IIS role is no longer required.
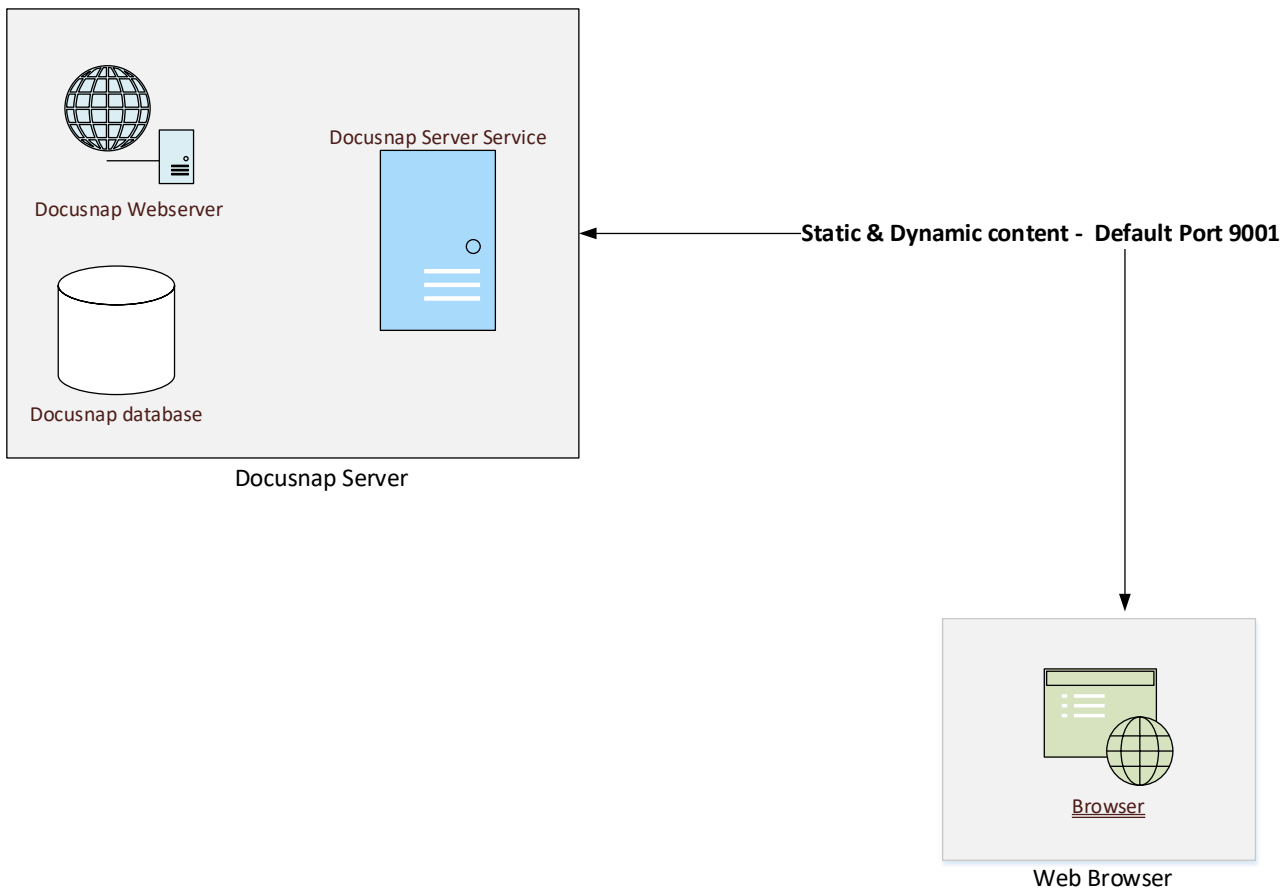

Fig. 1 – Docusnap Webserver architecture

Important: The default port for Docusnap Web is 9001. Unlike the Docusnap Web IIS variant, no other ports are required. The single port can be configured in Docusnap using a central setting.

Make sure that the remote Docusnap Web devices can access your Docusnap system via this port.

1.4 Docusnap Web IIS – legacy architecture

The diagram below shows the architecture of legacy Docusnap Web installations that use IIS.

During the installation, an IIS webserver was added to the Docusnap system and a static website was created. 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.
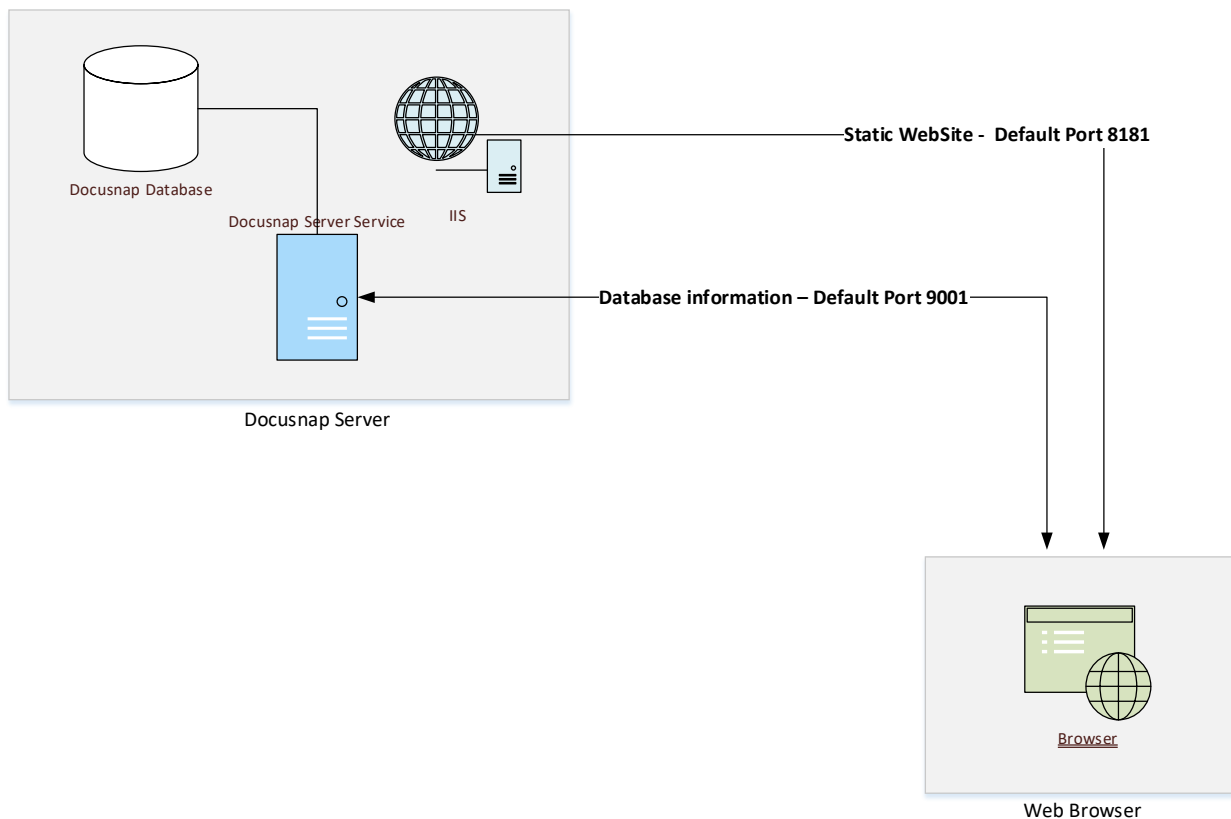

Fig. 2 – Docusnap Web IIS Webserver

Important: The static website can only be viewed in the browser if a special port has been opened for access to the IIS webserver. Another port is required to access the Docusnap Server API. Information from the Docusnap database will be loaded into the browser using this interface. The default port for the IIS webserver is 8181, the Docusnap Server API is by default accessed via port 9001.

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

2. Activating Docusnap Webserver

2.1 Starting the Docusnap Server configuration

If you selected Docusnap Server at the time of the initial installation, Docusnap Webserver is already active and can be accessed via the default port 9001. If Docusnap Server is not yet active, you can activate it under *Options – Docusnap Server*.
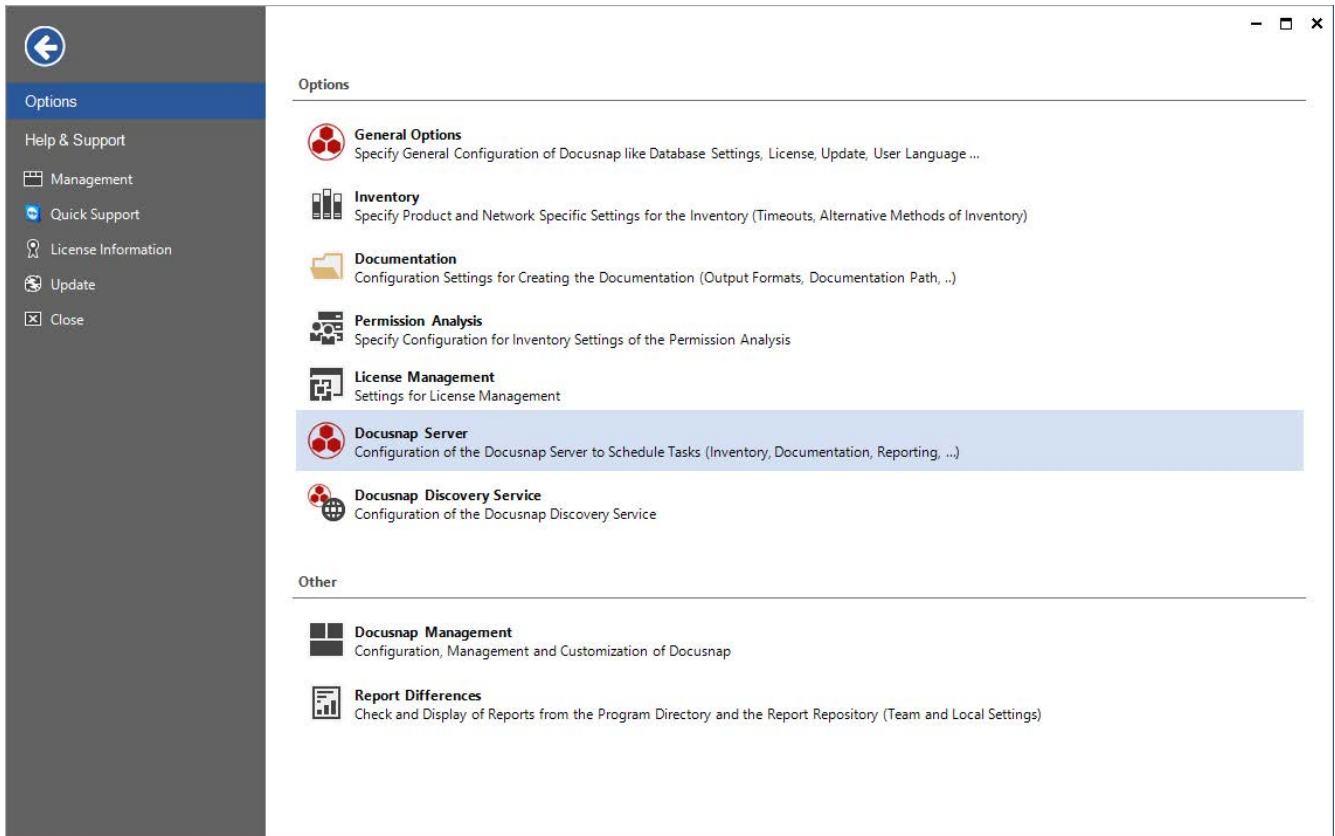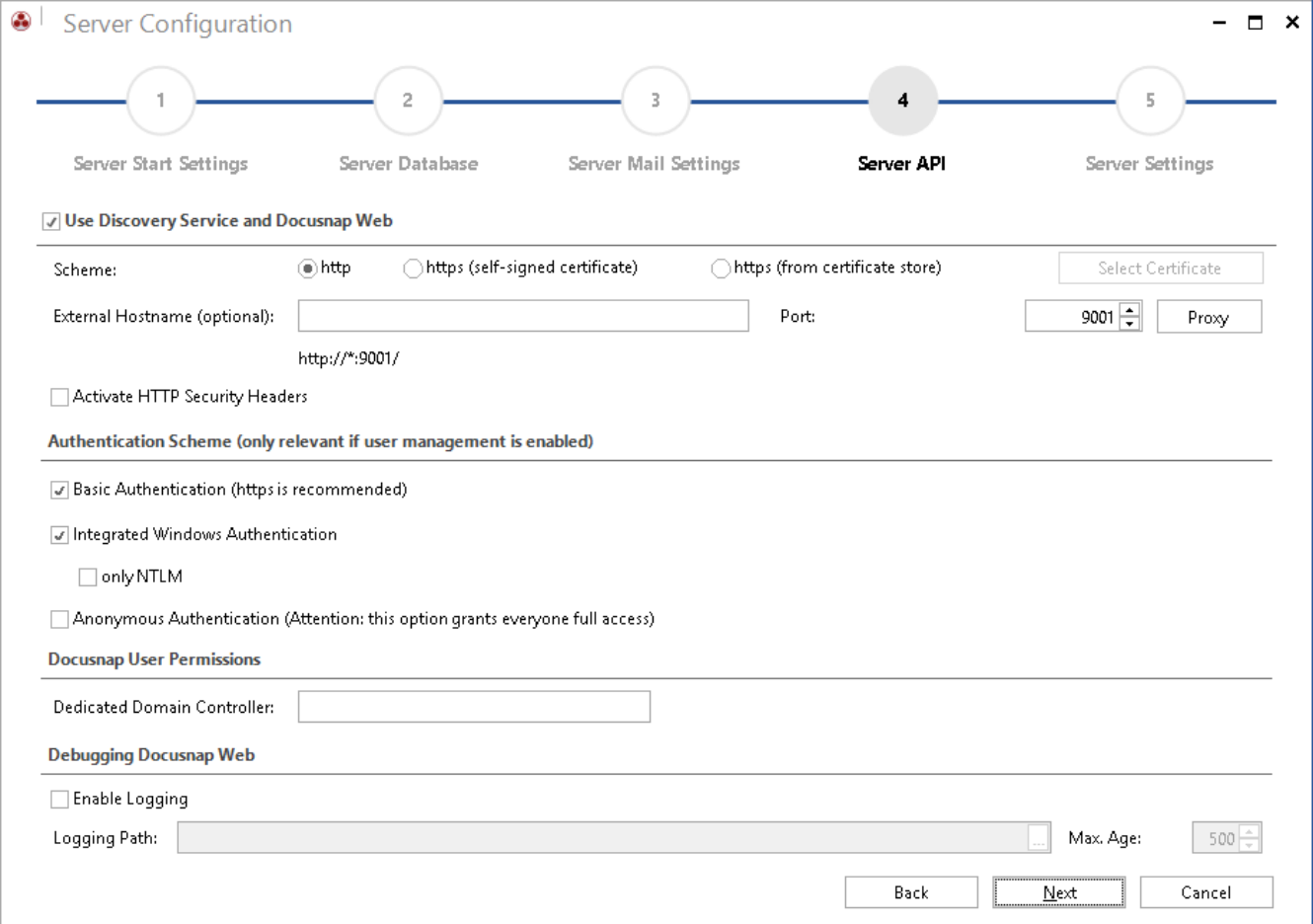

Fig. 3 – Configuring Docusnap Server

2.2 Configuring Docusnap Server – step 4, Server API

In this dialog, you configure all settings relevant to the use of Docusnap Web:

Fig. 4 – Docusnap Server – Step 4 – API

Use Discovery Service and Docusnap Web pane

- Enable the *Use Discovery Service and Docusnap Web* checkbox
- Select the http or https protocol
- If you want to use *https*, select the certificate or create one yourself (self-signed certificates are only recommended for testing)
- Optionally, specify an external host name and/or the desired proxy settings
- Select the port (default: 9001)

Authentication Scheme pane

Please note: If you did not configure any users for Docusnap Web in the Docusnap User Management, *Docusnap Web will be available to all users*, regardless of the configured authentication settings.

- *Basic Authentication* – Required if users outside your ADS need to access the Web client.
- *Integrated Windows Authentication* – The availability of single sign-on depends on the browser, i.e. this feature is not guaranteed.

- *Anonymous Authentication* – Full access for all users when the Docusnap User Management is enabled.

Debugging Docusnap Web pane

The *Enable Logging* option found on this pane is only intended for the Docusnap Support team; it is not relevant to normal operation.

2.3 Docusnap Web – functional test on the Docusnap Server system

Once you have completed the configuration of Docusnap Server and the server service is available, Docusnap Web is ready for use. To test the functionality of Docusnap Web, enter the URL *http://localhost:9001* in your browser:
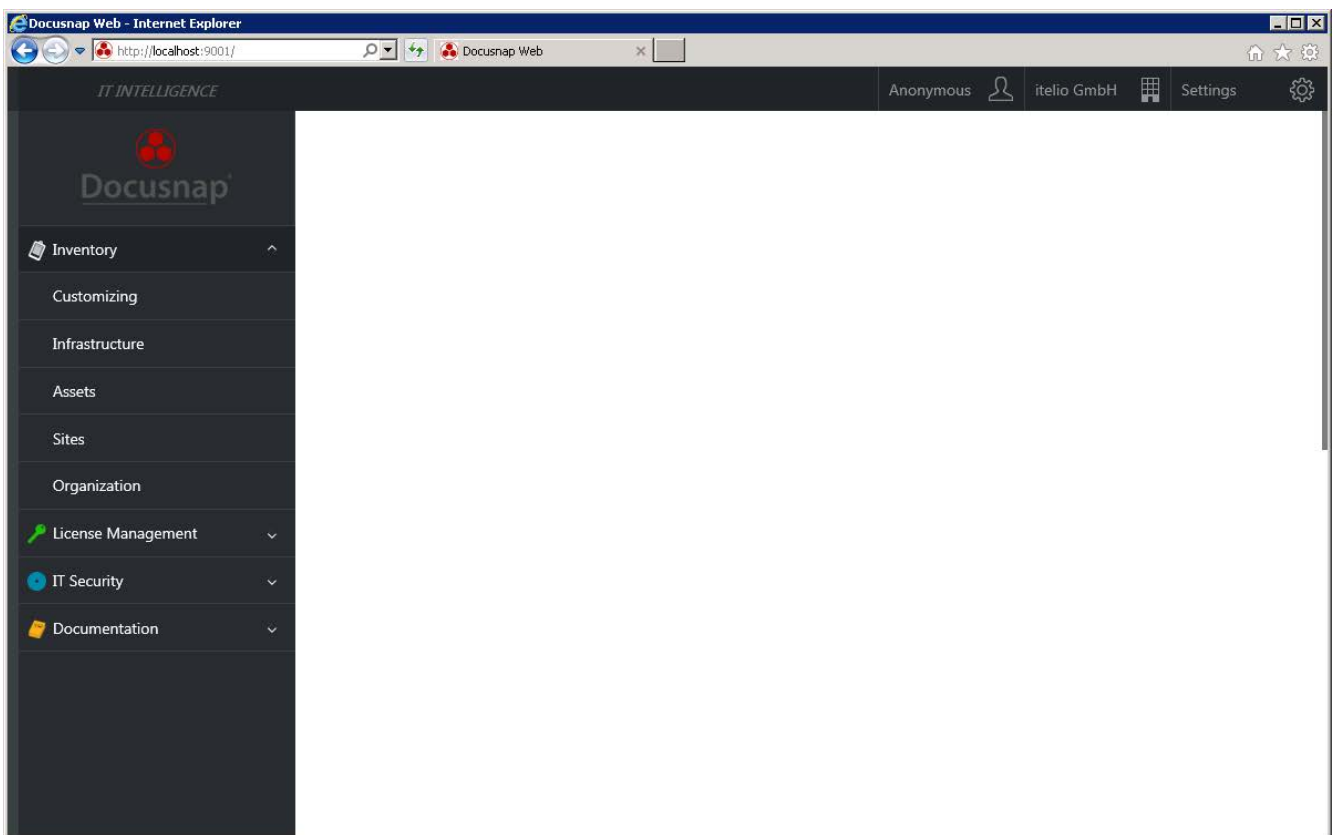

Fig. 5 – Docusnap Web: functional test

2.4 Optional step: Customizing the Server API setting

If you operate more than one Docusnap installation, the URL of the system on which Docusnap Server was configured should be changed – for all Docusnap installations – from the default value, i.e. *http://localhost:9001*, to the host name or IP address actually used.

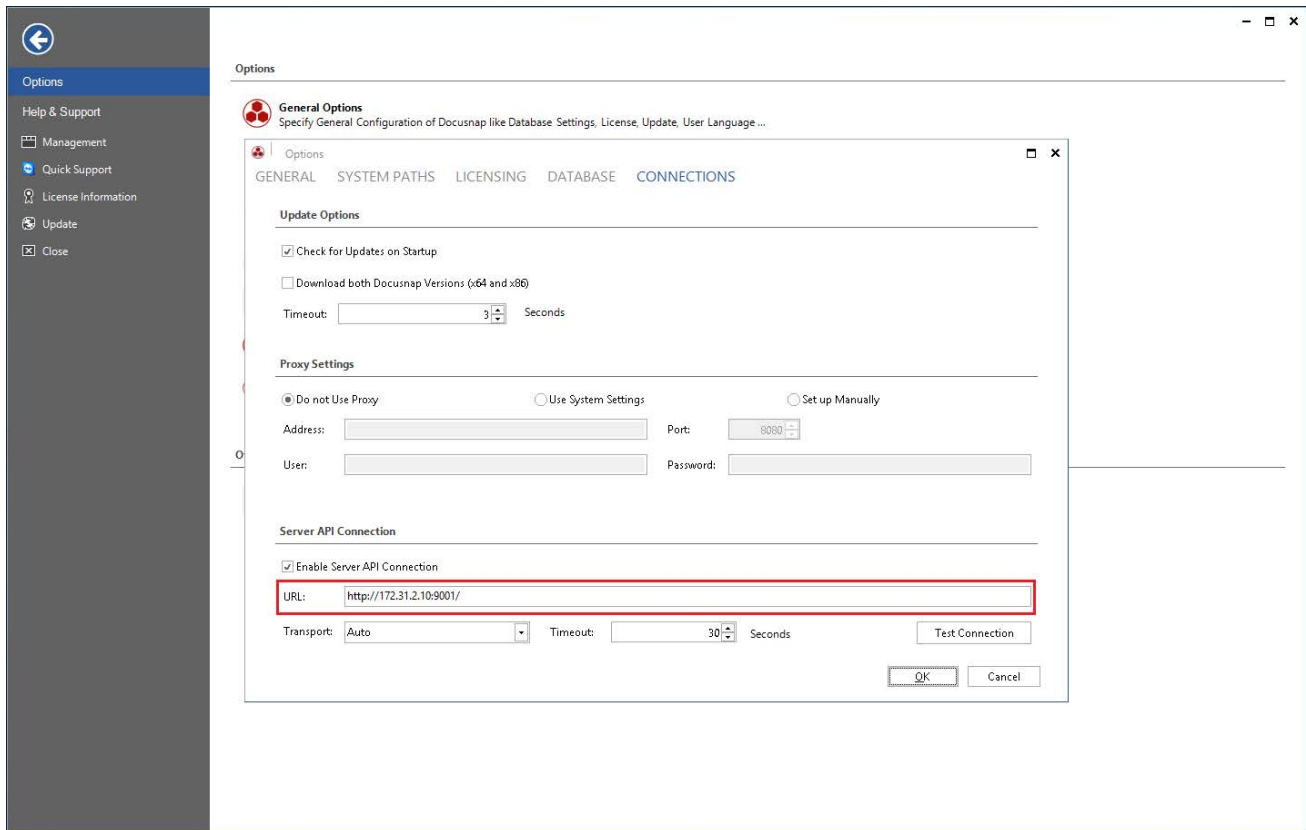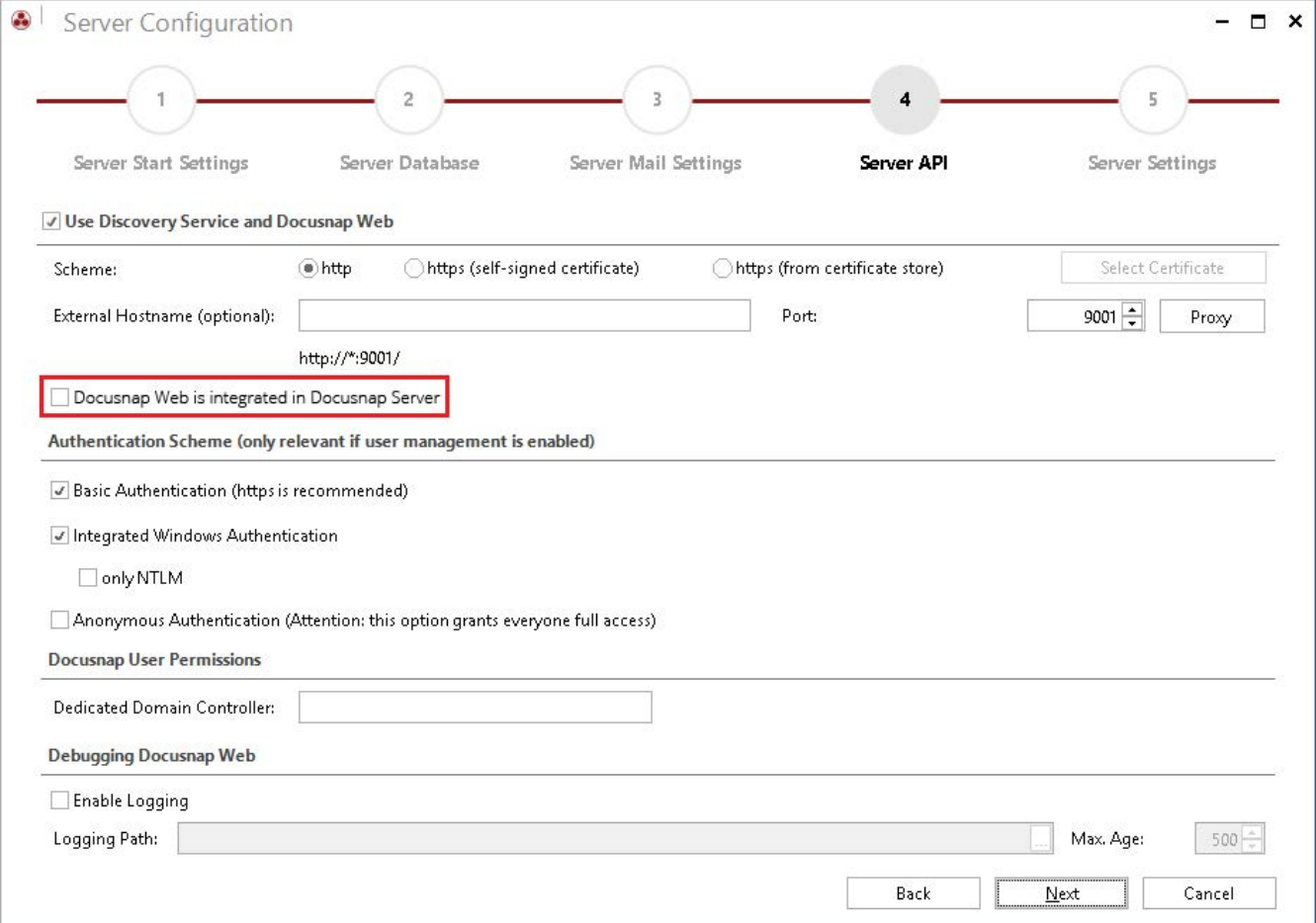 *Options – General Options – Connections – Server API Connection*

Fig. 6 – Connection options – Customizing the server API

3. Changing from IIS to Docusnap Webserver

Until May, 2018, Docusnap needed the Internet Information Server Role for providing the static web items (see section 1.4, Docusnap Web IIS Architecture).

For new Docusnap installations, the Docusnap Webserver is now installed automatically. For legacy installations with IIS, the IIS server is enabled under the configured port (default: 8181) after the update. However, the Docusnap Server configuration allows you to enable the Docusnap Webserver for legacy installations as well.

Fig. 7 – Enabling Docusnap Webserver for legacy installations – Option only available in legacy installations

When you restart Docusnap Server, the Docusnap Webserver is active and the Docusnap Web contents will also be output via port 9001 (default port for the Docusnap API). From then on, the IIS role is no longer required and you no longer need to enable port 8181 (default port for IIS).

Please note for future planning that the development of Docusnap Web IIS has been discontinued so that it will no longer be available in Docusnap in the medium term.

4. Docusnap Web – Known issues with self-signed certificates

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.

A security alert is displayed. Confirm the prompt. When you close this dialog, the Docusnap Web Client starts.

Whether these prompts are displayed or not depends on the certificate used to establish the https connection to the Docusnap Server API.
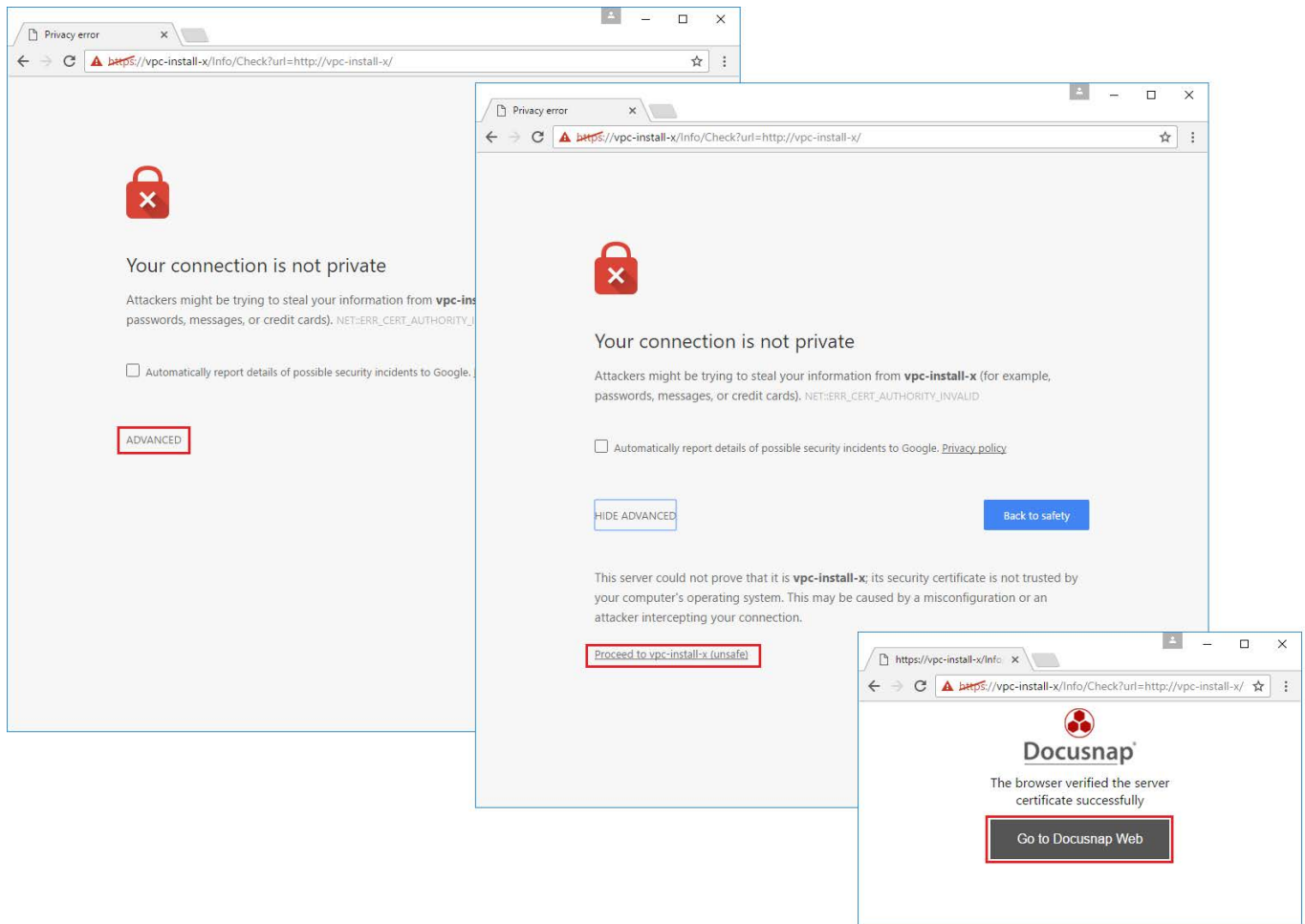

Fig. 8 – Operating system security alert – Google Chrome browser

5. Administering user access to Docusnap Web

The authentication scheme for the access to Docusnap Web can be changed while you configure the Docusnap Server in the *Server API* step. 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.

5.1 Enabling user management

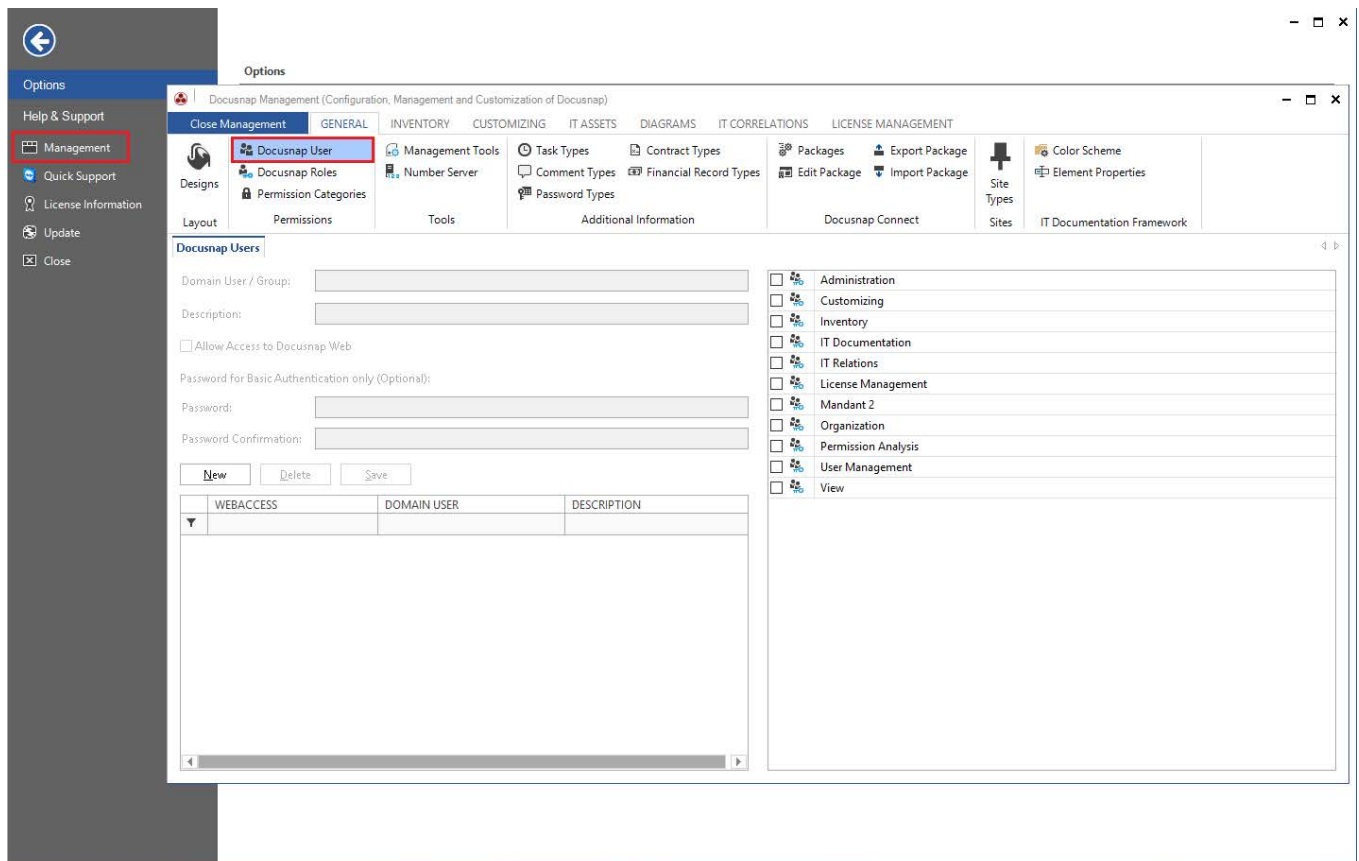To switch to the Docusnap User Management, click *Management – General*.

Fig. 9 – 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 <u>online manual</u> The corresponding manual chapter can be accessed directly by pressing F1 – provided that the Docusnap system has Internet access.

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

The Basic Authentication scheme requires you to enter a password for accessing the Web Client.

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 / groups who are supposed to work with the Docusnap Client must be assigned corresponding user roles!
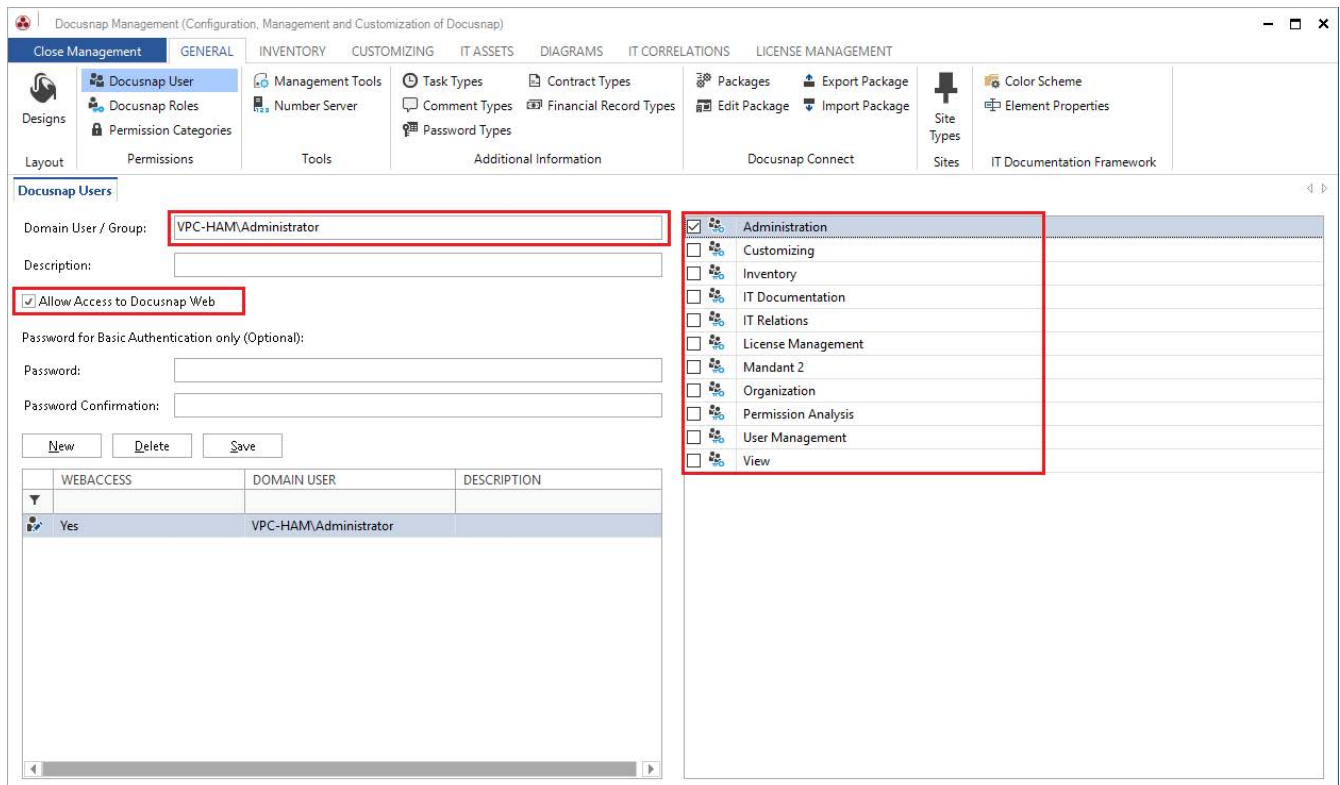

Fig. 10 – Adding users when using the Integrated Windows Authentication scheme

6. Using the ONC path in Docusnap Web

The ONC (Object Numbering Convention) is a coded path to a concrete object in the Docusnap trees. Each object in Docusnap is uniquely identifiable via this.

The ONC path can be generated during the creation of a Docusnap Connect Package - optionally the ONC column can be output.

Another possibility is to select the desired object in the data tree and press CTRL + C.

For more information on the ONC path, see the Docusnap User Manual - Docusnap and External Programs. For more information about Docusnap Connect, see the HowTo Docusnap Connect Export and Import.

The ONC path can also be used to navigate to the selected object in Docusnap Web. To do this, enter the path in the URL line.

> Example: http://localhost:9001/ONC/[1,1]\[1,2]\[2,4]\[2,5]\[6,6]

After confirming the URL, it is necessary to authenticate, after which the desired content is opened in Docusnap Web

LIST OF FIGURES

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
September 14, 2016	Version 1.4 – Screenshot with Docusnap X status bar; handling of private certificates updated
June 01, 2018	Version 2.0 – Release of Docusnap Webserver – complete revision of the HowTo document
January 27, 2020	Version 2.1 – Version removed from title; screenshot update; ONC path added