



DocuSnap Web

Configuring a Company-Specific Access

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1. Introduction

DocuSnap Web provides read access to the data available in DocuSnap. The data can be output here as well as within the client application in the form of lists, reports and plans.

By activating the user administration in DocuSnap, a granular authorization assignment can be set up via a user-role concept. By means of this authorization assignment, you can define which functions and information can be called up by the users. The authorization assignment regarding the information to be displayed also has a direct effect on DocuSnap Web.

If you document several companies / clients in your DocuSnap instance, you can use the user administration and DocuSnap Web to set up access to their data, for example, for your customers. The data of the other clients cannot be viewed in this case.

A detailed HowTo regarding the general use of the user administration, with further application scenarios can be found in the Knowledge Base: User Administration.

Please note that client-specific access to the database, both via the client and DocuSnap Web, may incur license costs for the Microsoft SQL Server and this must be checked in advance. Unfortunately, DocuSnap Support cannot give you license advice or license information here.

2. Prerequisites

The implementation of client-specific access to DocuSnap Web first requires that

- DocuSnap Server has been successfully set up
 - Basic and/or integrated Windows authentication has been selected as authentication scheme within the configuration (Step 4 - Server API).

A corresponding HowTo describing the installation and configuration can be found in our Knowledge Base.

3. Docusnap web

3.1 Configure authentication scheme

Open the configuration of the Docusnap Server

- General (Docusnap icon in the title bar) - Docusnap Server Configuration
- Step 4 - Server API

3.1.1 Anonymous Authentication

Anonymous authentication grants unrestricted read access to any network user who has the Docusnap web address.

This is of particular concern if the Server API, and therefore Docusnap Web, is externally accessible. For example, you are using Docusnap Discovery Services for inventorying distributed environments.

If this authentication scheme is enabled and you enable Docusnap User Management, anonymous access to Docusnap Web will be blocked! One of the following authentication schemes must be selected.

3.1.2 Basic Authentication

With basic authentication, the users used later are created and managed in Docusnap User Management.

With this method, users outside their own domain can be authorized for Docusnap Web.

Basic authentication can be combined with integrated Windows authentication.

3.1.3 Integrated Windows Authentication

This method is recommended for granting users within your own domain access to Docusnap Web. ADDS security groups and users can be added and authorized to the user management.

Please note that single sign-on cannot be guaranteed in every environment. If single sign-on does not work for you, check the inclusion of Docusnap Web in the local intranet zone. Furthermore, you can switch to NTLM for built-in Windows authentication (Docusnap Server service configuration).

Integrated Windows authentication can be combined with basic authentication.

4. DocuSnap User management

This chapter briefly explains the DocuSnap user administration required for this HowTo. Only functions that are required for this example are discussed. Further information can be found in our Knowledge Base in the HowTo: DocuSnap User Management.

4.1 User Management

To activate the user management in DocuSnap, go to the

- DocuSnap Administration - General - User Management - DocuSnap Users

ADDS users and groups can now be added. Furthermore, basic users can also be created with a password. Basically, it can be decided whether the group or the user should have access to DocuSnap Web.

After adding the users and/or groups, they are assigned to one role, or combined to multiple roles.

4.2 DocuSnap Roles

Roles define the functionality and what information may be accessed in DocuSnap. Within the

- Administration - User Management - DocuSnap Roles

you can view the predefined roles and create new ones. In Administration, after selecting a role, you can view the controls enabled for the role or assign them for a new role.

4.3 Object permissions

In addition to the controls, the roles are also used to manage access to the data. Within the data tree, the object permissions can be opened and set with a right click.

In this example, the company Docusnap GmbH was selected and the object permissions were opened by right-clicking. The role Administration was granted full access to the object class of the type Company.

The role Docusnap GmbH, on the other hand, was only granted read access to the specific company object Docusnap GmbH. For this role, the Docusnap Sports company object is now no longer visible.

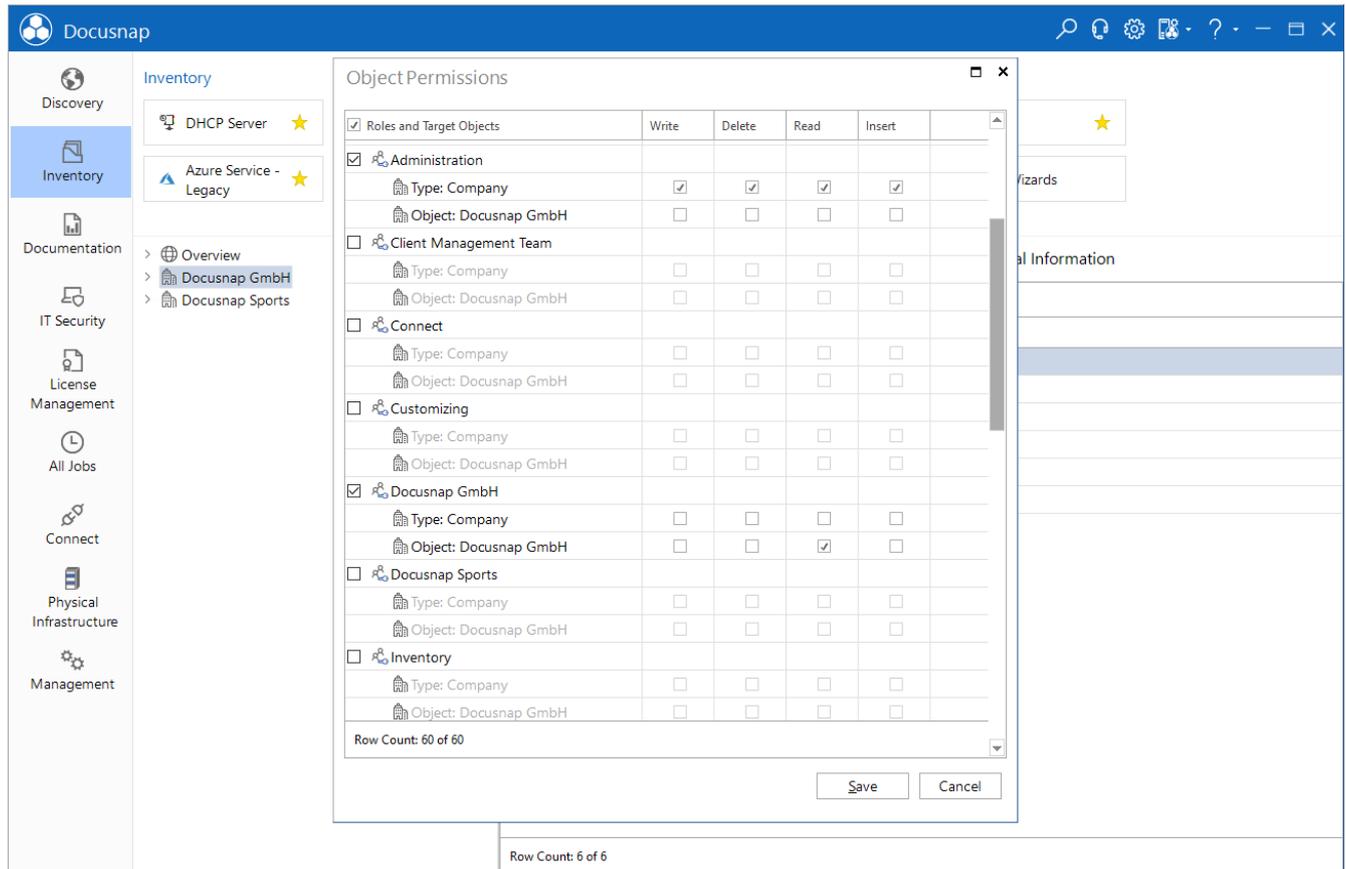


Figure 1 - Set object permissions

5. Setting up client-specific access

5.1 Request

The following screenshot should clarify the requirement again.

- If a user of the role Docusnap GmbH authenticates, he should only have access to the data of the company Docusnap GmbH.
- If a user of the role Docusnap Sports is used, he should only see the company Docusnap Sports.

In this case, the users are created as basic users. So the users and their passwords are managed in the Docusnap administration.

If the companies in your Docusnap instance are part of an organizational structure with shared Active Directory, you can also use domain users or groups.

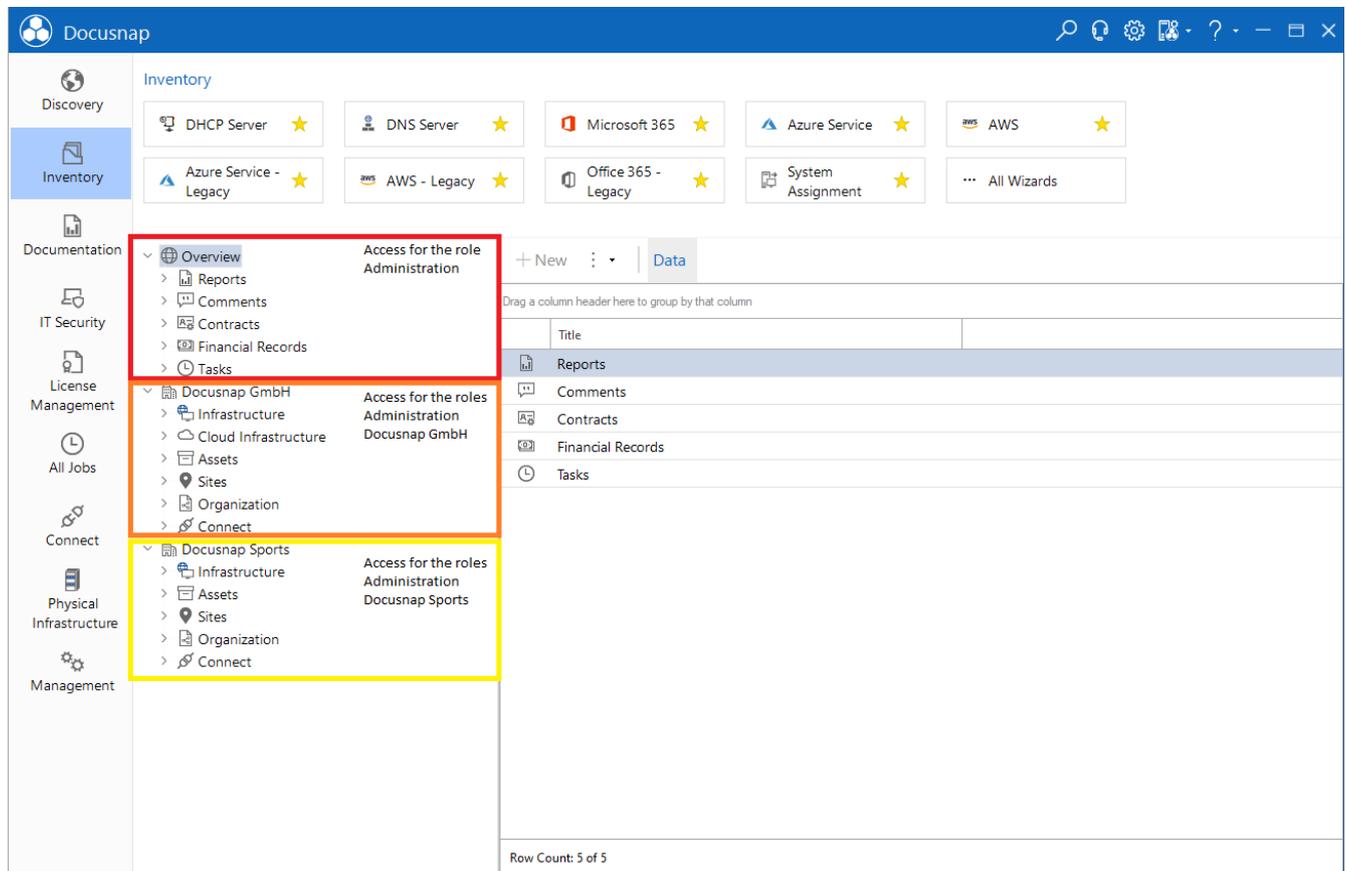


Figure 2 - Client-specific access - request

5.2 Implementation

The implementation involves three steps:

1. create roles
2. create user and assign roles
3. set object permissions

The implementation starts with the creation of the roles. The roles reflect the companies in the DocuSnap database.

- DocuSnap Administration - General - User Administration - DocuSnap Roles

Create the new roles - in this case

- DocuSnap Ltd.
- DocuSnap Sports

The next step is to create the basic users and assign them to the roles

- DocuSnap Administration - General - User Management - DocuSnap Users

In this case

- DocuSnapGmbHWeb
 - Allow access to DocuSnap Web
 - Assign password
 - Assign roles - DocuSnap GmbH
- DocuSnapSportsWeb
 - Allow access to DocuSnap Web
 - Assign password
 - Role assignment - DocuSnap Sports

Finally, the object permissions are assigned to the company objects in the tree structure - see Figure 1:

- Overview
 - Administration
 - Type: Overview
Write, Delete, Read, Insert
- Docusnap GmbH
 - Administration
 - Type: Company
Write, Delete, Read, Insert
 - Docusnap GmbH
 - Object. Docusnap GmbH
Read
- Docusnap Sports
 - Administration
 - Type: Company
Write, Delete, Read, Insert
 - Docusnap Sports
 - Object. Docusnap Sports
Read

Now when you open Docusnap Web and use one of the previously created users, you can perform the client-specific access.

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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
January 2, 2023	Version 3.0 – Revision of the HowTo for Docusnap 12
