



## Docusnap – Installing and Configuring

*Installing and Configuring Docusnap*

<b>TITLE</b>	Docusnap – Installing and Configuring
<b>AUTHOR</b>	Docusnap Consulting
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## 1. INTRODUCTION

The installation and configuration of Docusnap includes the following points:

- Installation and configuration of the **Docusnap Client**
- Configuration of the **Docusnap Server Service**

In addition, you need a Microsoft SQL Server instance to run Docusnap.

This HowTo will guide you through the entire installation and configuration process of Docusnap as well as a Microsoft SQL Server Express instance.

Furthermore, the use of a central configuration file is described. This file contains all the necessary configurations of Docusnap and is set up so that every user of Docusnap uses this configuration file.

You can also use the configuration file to deploy Docusnap via a terminal server, for example.

### 1.1 DOCUSNAP – ARCHITECTURE

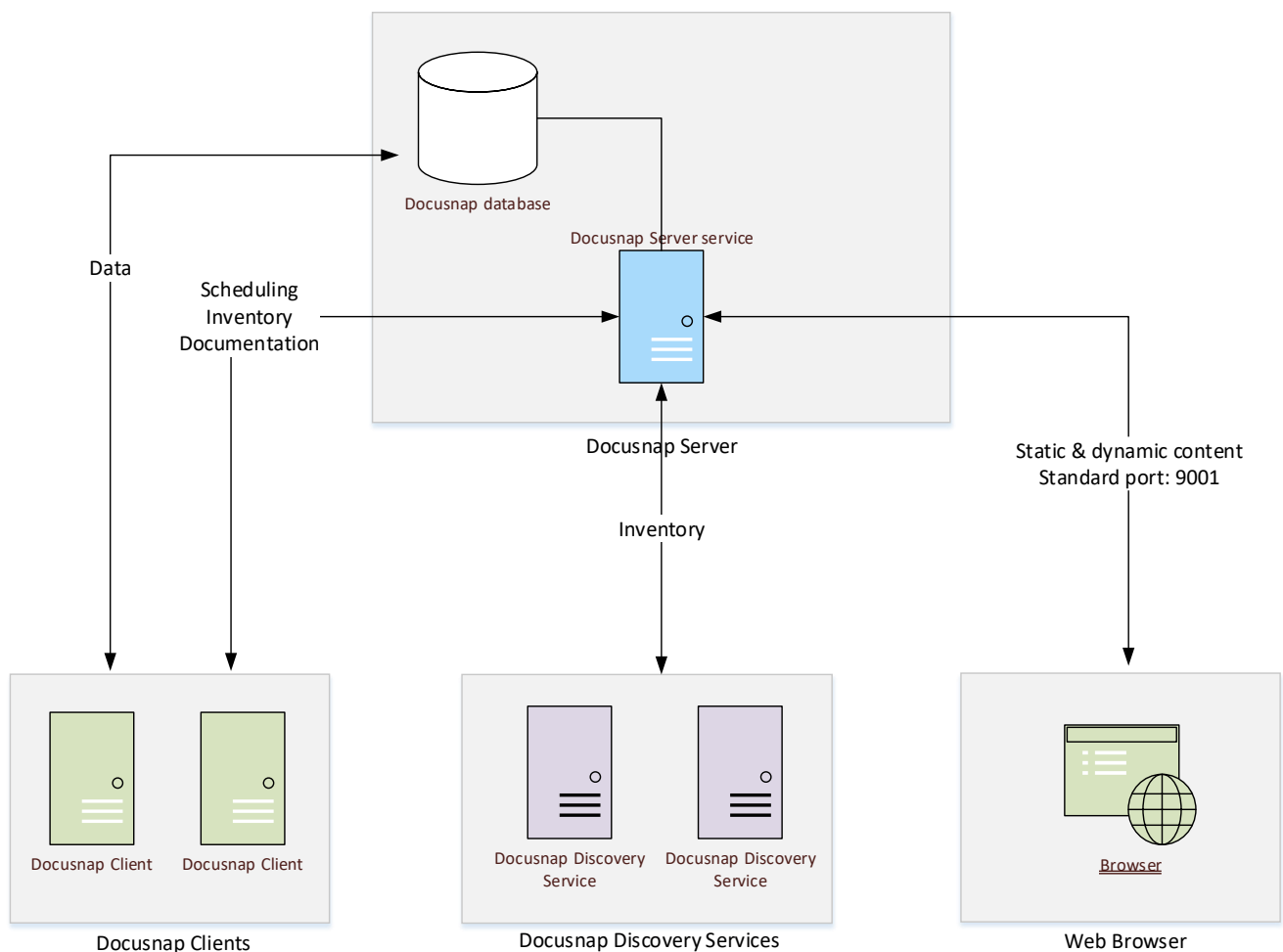


Fig. 1 - Overview of the Docusnap Architecture

## 2. BASIC INSTALLATION OF DOCUSNAP

### 2.1 SYSTEM REQUIREMENTS

- Recommended is at least Windows 10 / Windows Server 2016
- Recommended min. 4 GB RAM, recommend 8 GB RAM
- Recommended min. 2 CPU cores or more, recommend 4 CPU cores
- At least .NET Framework 4.8

The specifications regarding CPU and RAM refer to Docusnap only. If you run the SQL-Server instance on the same system as the Docusnap Server, the hardware equipment should be adapted accordingly.

### 2.2 PREPARING THE DATABASE SERVER

A database system is required to store the data in Docusnap. As database system the Microsoft SQL Server Express LocalDB, Microsoft SQL Server Express (from version 2012) or a full Microsoft SQL Server (from version 2012) can be used.

Microsoft SQL Server Express LocalDB is recommended for testing purposes only. If this is used, the Docusnap server service (scheduled execution of tasks), the Docusnap web client and the Docusnap discovery services (decentralized inventory of remote locations) cannot be used.

If the Microsoft SQL Server Express LocalDB has been used for test purposes, the [Docusnap database created there can be added to a Microsoft SQL Server Express or full Microsoft SQL Server](#).

For productive use of Docusnap, we recommend using the current Microsoft SQL Server Express version. In addition to the database instance, the full text search should also be selected during installation.

The Microsoft SQL Server Express is a free solution, which has the following limitations compared to a full-fledged Microsoft SQL Server:

- SQL Server Express from 2012 (recommended is always the latest supported version, 2017, 2019)
  - Support for one processor, but up to four processor cores
  - Maximum use of 1 GB (1410 MB) of memory
  - Database size maximum 10 GB
  - No SQL Server Agent (automation, e.g. data backup)

[The Installation and Configuration of SQL Server](#) chapter describes the installation and configuration of Microsoft SQL Server Express. It is recommended to install and configure it **before** the Docusnap basic installation.

## 2.3 BASIC INSTALLATION

After the downloaded of the current installation file, the Docusnap installation includes the following steps:

- Welcome screen
- End User License Agreement - Consent required
- Select installation directory
- Database selection
- IP Scanner / recommended drivers
- Completion / Installation

In the step **Database Selection**, you must decide whether you want to use an existing Microsoft SQL server (recommended) or the local database. Docusnap will not install a Microsoft SQL Server in this step - it must already be available.

In the step **IP Scanner / recommended drivers** you can install the NPCAP driver. This is a prerequisite for the extended IP scan. You can also install the NPCAP driver manually, the setup is located at %ProgramFiles%\Docusnap 13\MSI\npcap-oem.exe

### 3. CONFIGURING DOCUSNAP

After Docusnap and Microsoft SQL Server have been successfully installed, the basic configurations of Docusnap and Docusnap Server can be performed.

#### 3.1 BASIC CONFIGURATION OF DOCUSNAP

##### 3.1.1 ACTIVATION

After starting Docusnap, the first step is to activate the product. This can be done either online or offline.

The activation key is delivered by e-mail. This key is entered in the **Activation Key** field.

##### How to activate the Docusnap installation online

After entering the key press the **Activate** button. A permanent connection to our license server (<https://license.docusnap.com>) must be possible.

##### Procedure for offline activation of the Docusnap installation

If the computer with the Docusnap installation does not have an Internet connection or the online activation fails, you can also activate Docusnap via **offline activation**.

After entering the activation key press the **Offline Activation** button and select **Create Activation Request**.

This activation file will be uploaded to the <https://www.docusnap.com/en/offline-activation> website. After successful activation via the website, the license file can be downloaded. This is loaded into Docusnap and the offline activation is completed.

### 3.1.2 START OPTIONS

After successful activation, the next step is to select the desired functionality of the Docusnap installation. Depending on this selection, the further assistance steps are released.

- **Configure Docusnap Client**
  - Classic user interface of Docusnap
  - Multi-user environment: connection of the Docusnap Client to a central database
- **Configure Docusnap Server**
  - Central component in multi-user environments
  - Automation of inventory and documentation tasks
  - Connection endpoint for Docusnap Discovery Services
  - Provision of information for the Docusnap Web Client

The Docusnap Server can also be set up later.

### 3.1.3 DATABASE CONNECTION

The following information requires the [Installation and Configuration of the Microsoft SQL Server](#) (Express).

Information about the SQL server and the database:

- SQL server name or IP address
- server name\instance name or IP address\instance name
- Name of the database

#### Authentication

- Windows authentication: The prerequisite for this is that the logged on user can log on to the selected database.
- SQL Server Authentication: If user accounts have been created on the SQL Server, this authentication can be used.

The Docusnap database can only be created using the wizard and the Create button. If you create a new Docusnap database, you need a privileged user (e.g. dbcreator).

The users need db\_owner authorizations for the later operation and thus for the establishment of the connection to the Docusnap database. To do this, select the Connect/Create button.

After the necessary data has been entered, you can create the database by clicking on the Connect/Apply button.

When creating a new database, you have the option of including the Docusnap demo client in the database. This contains demo data.

Note: The demo client cannot be added afterwards for technical reasons.

### 3.1.4 SETTINGS

In step 4, the Docusnap system paths are specified. By default, documentation, reports, input masks and other documents are stored in these paths. In addition, you will find customizations and other settings there.

Best practice is to set up a central Docusnap directory that is accessible via the network by means of sharing.

In most cases, the Local and Team Settings paths can be combined - separating them only makes sense if, for example, you need to scan with an additional standalone Docusnap system on a remote network. With this centralized sharing path, you are prepared to use Docusnap with multiple users and client installations. For example:

- \\DocusnapServer\Docusnap\Documentation
- \\DocusnapServer\Docusnap\TeamSettings
- ...

**ATTENTION:** If a path is referred to, for example, in a user profile, other users of the application may not have access to the data stored there. If you want to use the Docusnap Server and several people access the application, always use the corresponding network shares.

### 3.1.5 ENCRYPTION

Docusnap offers the possibility to store passwords. To use this password module, a new encryption file must be created or an existing one selected. Otherwise, this functionality is deactivated in the application. This encryption file provides an encrypted storage of the passwords within the database.

An encryption file can only be created once per database. There is no way to replace or recover passwords in case of loss.

For more information on how to use passwords or additional information in general, please refer to the appropriate HowTo in our Knowledge Base: [Add additional information in Docusnap](#).

## 3.2 CONFIGURING DOCUSNAP SERVER

### 3.2.1 SERVER START SETTINGS

The Docusnap Server is a Windows service. In order to start the Docusnap and use its functions, the start information and the connection to the Docusnap database must be stored once.

If the Windows service is running with the Local System account and the database is configured with Windows authentication, the service cannot be started because it cannot connect to the database. In this case, SQL Server authentication must be used. You can also authorize the local system account to access the database if the Docusnap Server and SQL Server are available on the same system.

Please also note the notes regarding the necessary authorizations when a user is used to run the service.

- Administration rights on the system
- Local security policy
  - Log on as a service
  - Replace a process level token

For more information, see the help that you call by pressing F1.

### 3.2.2 SERVER DATABASE

The Docusnap Server service also requires a connection to the previously created database.

Please note again the authentication at the database for the server service. If the Windows authentication is used, you must pay attention to who executes the Windows service and authorize accordingly!

### 3.2.3 SERVER SETTINGS

The account with which the service is started must have access to the specified paths. You must also make sure that the paths match those of the client configuration - see [Data Path Settings](#).

With a click on Next and then Finish the configuration of Docusnap and the Server Service is completed.

### 3.2.3.1 ADVANCED DOCUSNAP SERVER CONFIGURATION

During the initial configuration of the Docusnap Server service, two configuration steps are skipped - but you should do these later - **Server Mail Settings** and **Server API**.

To do this, open the configuration of the Docusnap Server in the **Title Bar – General - Docusnap Server Configuration**.

#### Server Mail Settings

Navigate to Step 3 – **Server Mail Settings** – and define the configuration that applies to you so that Docusnap can send you reports, documentation or notifications by e-mail:

#### Server API

The Server API is used for communication between Docusnap Server, Docusnap Client and Docusnap Discovery Services. Furthermore, the Server API with the schema and port to be configured below is also available for Docusnap Web.

Within step 4 - **Server API** - you can configure the Server API. Relevant for the configuration is the scheme - http or https with a certificate created by Docusnap itself or with a certificate from the computer store of the system.

The port must also be specified. With the command `netstat -ano | find "9001"` you can check whether the port on the system is already in operation by another application.

Regarding Docusnap Web you will also find the authentication scheme within the Server API. Here you should enable Basic and Integrated Windows Authentication by default. Note here that authentication is only active if user management has also been activated in Docusnap. Until this is implemented, the Anonymous Authentication is valid!

You can find more information about how to log in to Docusnap Web in the corresponding HowTo in our Knowledge Base: [Docusnap Web Configuration](#).

Please note the following with the HTTP Security Headers option:

Enabling this option causes the Web client to no longer display the embedded reports, maps and documents due to the higher security requirement!

This option denies loading X-frames, which provides protection against clickjacking.

Clickjacking attacks use multiple transparent/opaque layers that cause a user to perform actions that they do not want to perform or are unaware that they are performing - such as clicking a button or clicking a link.

If you have made any changes to the Server API (schema and/or port), you must then adjust the client's Server API connection. The customization can be done in the **General Options - Connections - Server API Connection**.

## 4. SETTING UP A CENTRAL CONFIGURATION FILE

In the previous chapter [Configuration Docusnap](#) the necessary steps concerning the configuration of Docusnap were described.

If you do not want to perform these steps with every Docusnap Client installation and additionally want to make sure that every user uses the same configurations, you can set up a central configuration file.

The executed client configurations were all stored in a configuration file. This can be found in the following path of the user who performed the configuration: %AppData%\Docusnap\Configuration.xml.

Create a new folder within your [Docusnap Base Path](#) - e.g. Configuration. Move the Configuration.xml file to this folder.

### 4.1 DOCUSNAP SHORTCUT

Also copy a Docusnap program link into this folder.

Now these two files have to be linked together. To do this, open the properties of the program link and define the following parameter in the target:

**-UseConfig \\Systemname\Sharename\Configuration\Configuration.xml**

```
"C:\Program Files\Docusnap 13\Docusnap.exe" -UseConfig "\\SRVDocusnap\Docusnap\Configuration\Configuration.xml"
```

In addition, you must change the name of the link, otherwise it will be removed and recreated when Docusnap is updated.

If you have now installed a new Docusnap Client, copy the new shortcut containing the UseConfig parameter to the desktop of the system and execute it. Docusnap can then be started without a new configuration.

Another purpose of the central configuration file is the installation of Docusnap on a terminal server. Set up the central configuration file here and add the corresponding program shortcut to the public desktop.

### 4.2 CENTRAL ADJUSTMENT OF THE SYSTEMS

Alternatively, you can also customize the following file on each installed Docusnap client as well as on the server: %ProgramData%\Docusnap\DocusnapSettings.xml

In this you can add the central configuration file in the XML tag <AlternativeConfigFile/>, this must be changed as follows:

```
<AlternativeConfigFile>\\SRVDocusnap\Docusnap\Configuration\Configuration.xml</AlternativeConfigFile>
```

## 5. INSTALLATION AND CONFIGURATION OF THE SQL SERVER

The following is a description of how to install and configure an SQL Server Express 2019 instance for use with Docusnap.

### 5.1 INSTALLING MICROSOFT SQL SERVER

You can download the necessary installation files directly from Microsoft.

Choose Custom or Download Media:

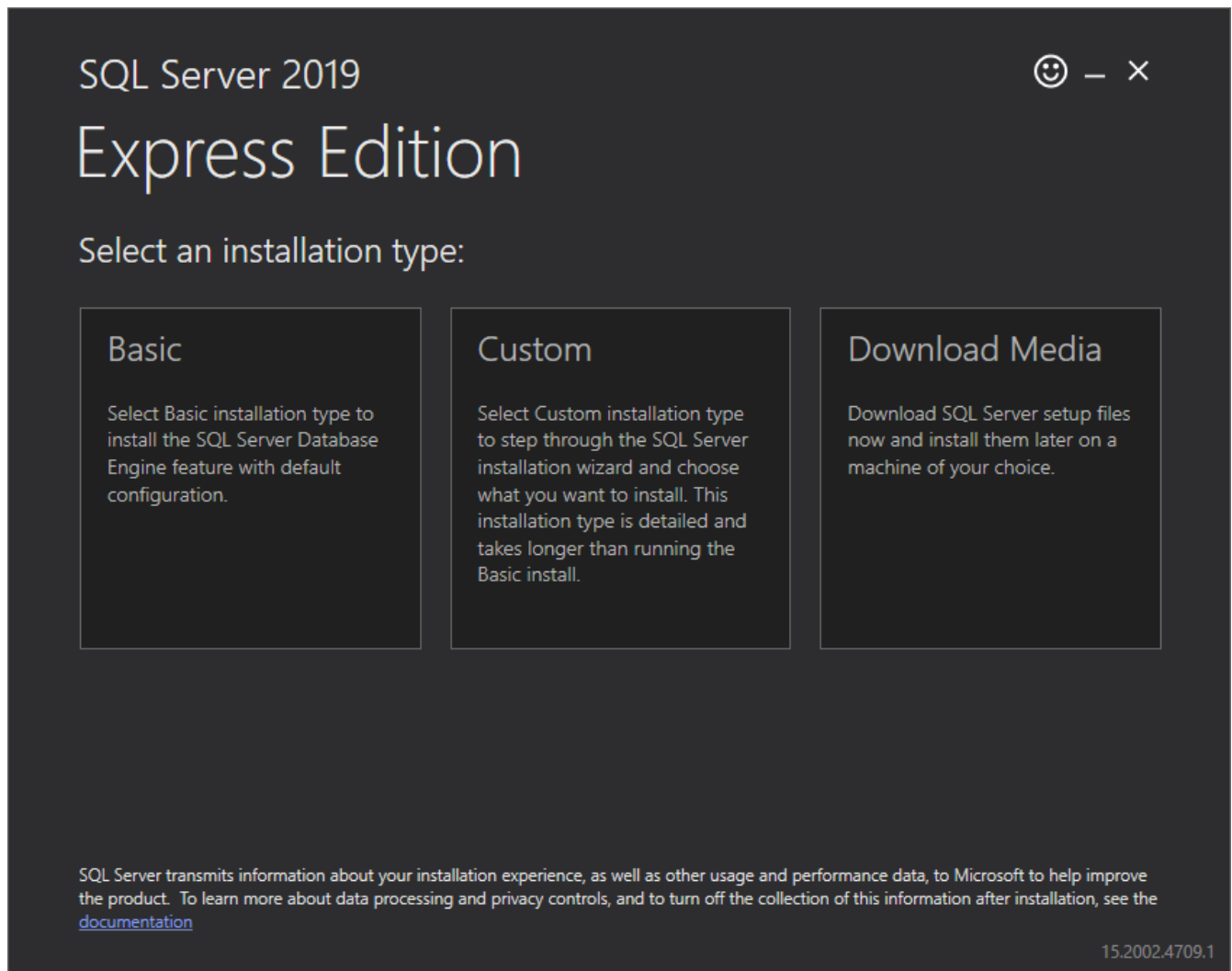


Fig. 2 – Choose SQL-Server Installation Type

If you want to download the installation media first, select The Express Advanced package.

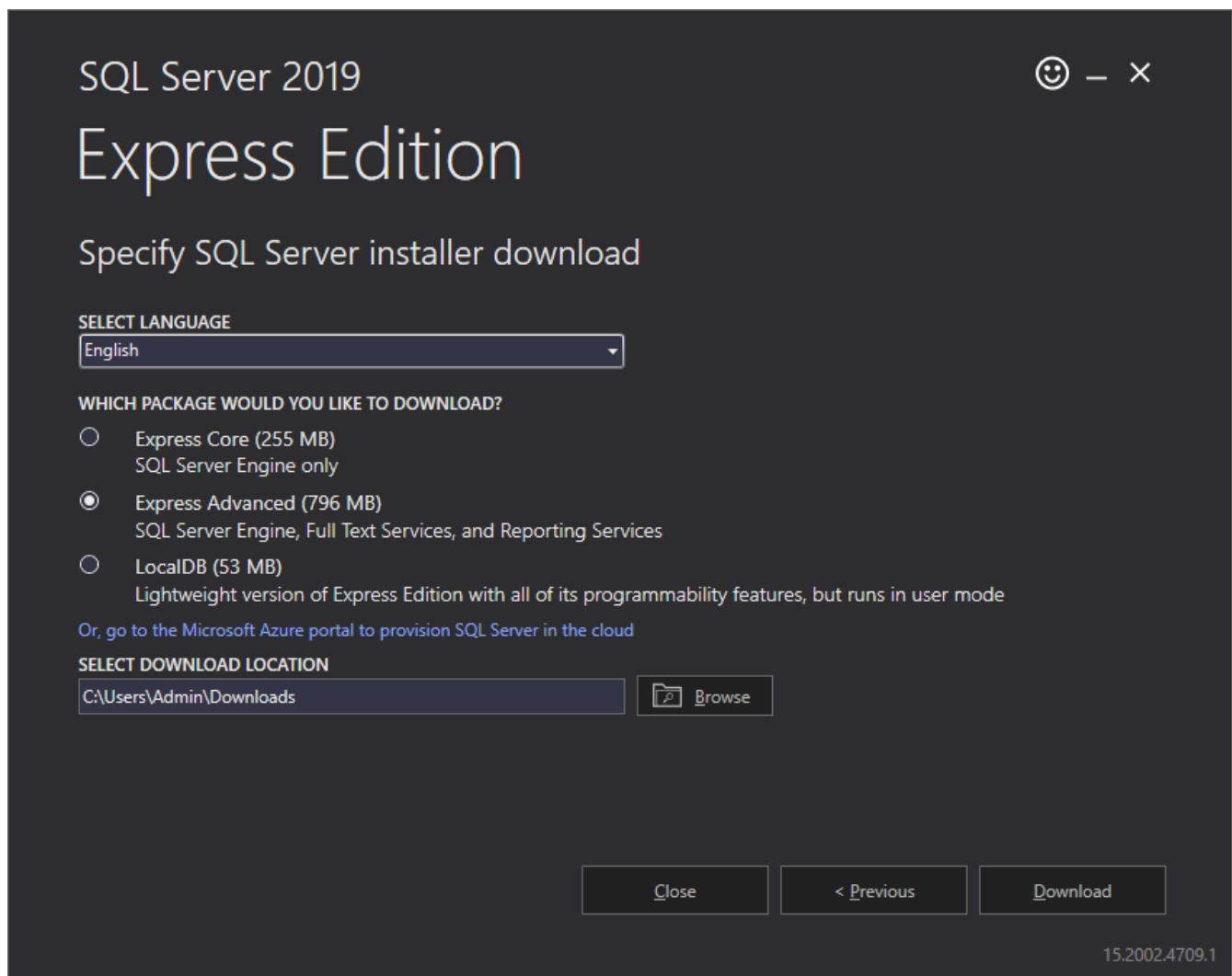


Fig. 3 - Download SQL Server Express installation files

Note: Only English can be selected for download (as of 05.11.2021) - an error message will appear if German is selected.

**Important:** To also have the Enterprise Search functionality in Docusnap, the Express Advanced package must be selected in the download.

Not all steps of the Setup Wizard are explained below. Only the items that need to be adjusted for use with Docusnap are described. Please leave all other configuration steps at default or adapt them to your needs.

## 5.1.1 INSTALLATION CENTER

Please start the installation file of Microsoft SQL Server Express. Select the installation of a new, standalone SQL Server installation. At the same time you can select **Install SQL Server Management Tools** as a precaution and download the installation files for SQL Management Studio - it is recommended to install this.

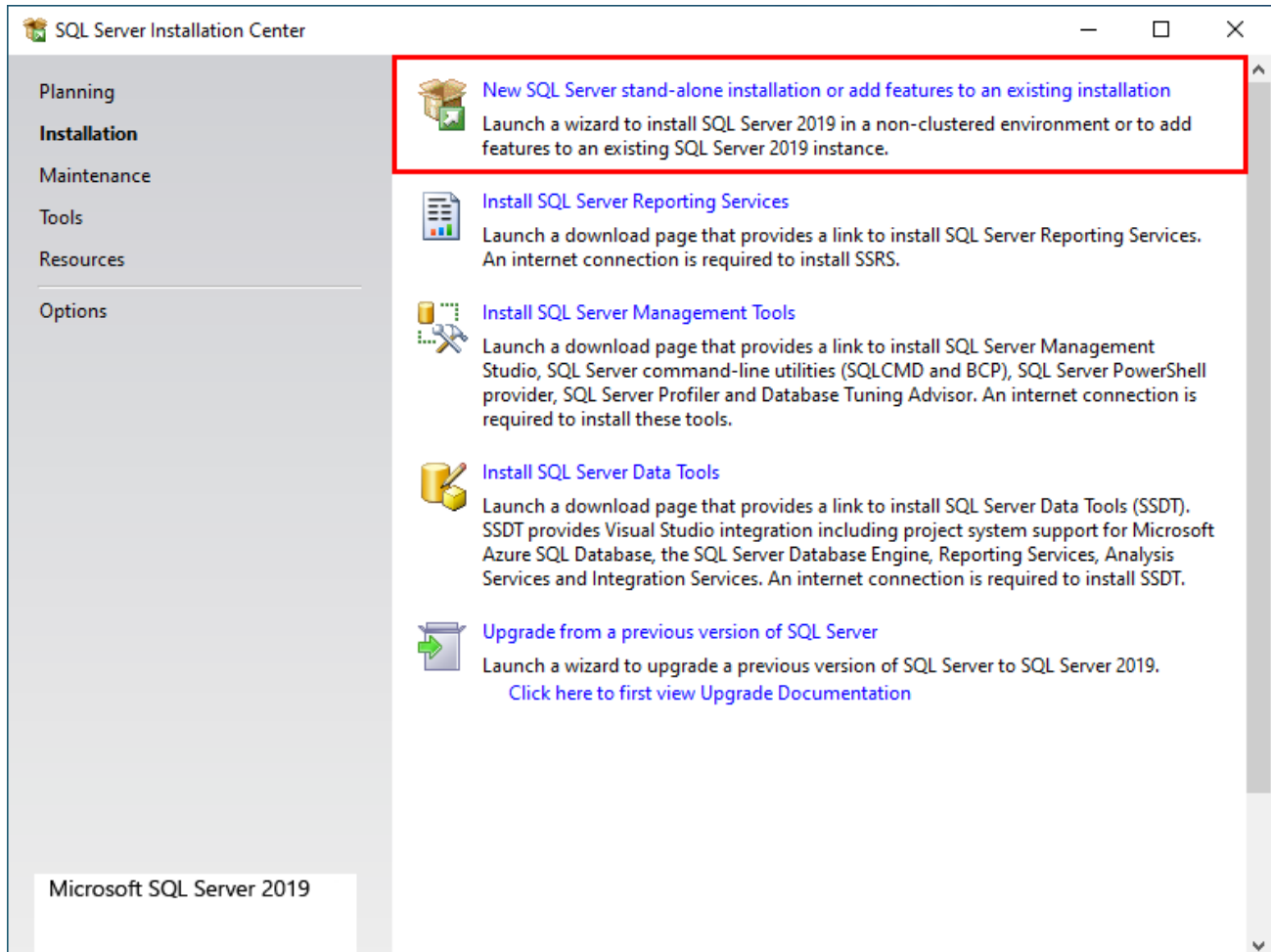


Fig. 4 - SQL Server Installation - Installation Center

## 5.1.2 FEATURE SELECTION

In the feature selection step, the following must be selected:

- Instance Features
  - o Database Engine Services
    - SQL Server Replication
    - Full-Text and Semantic Extractions for Search
- Shares Features
  - o Client Tools Connectivity
  - o Client Tools Backwards Compatibility
  - o Client Tools SDK
  - o SQL Client Connectivity SDK

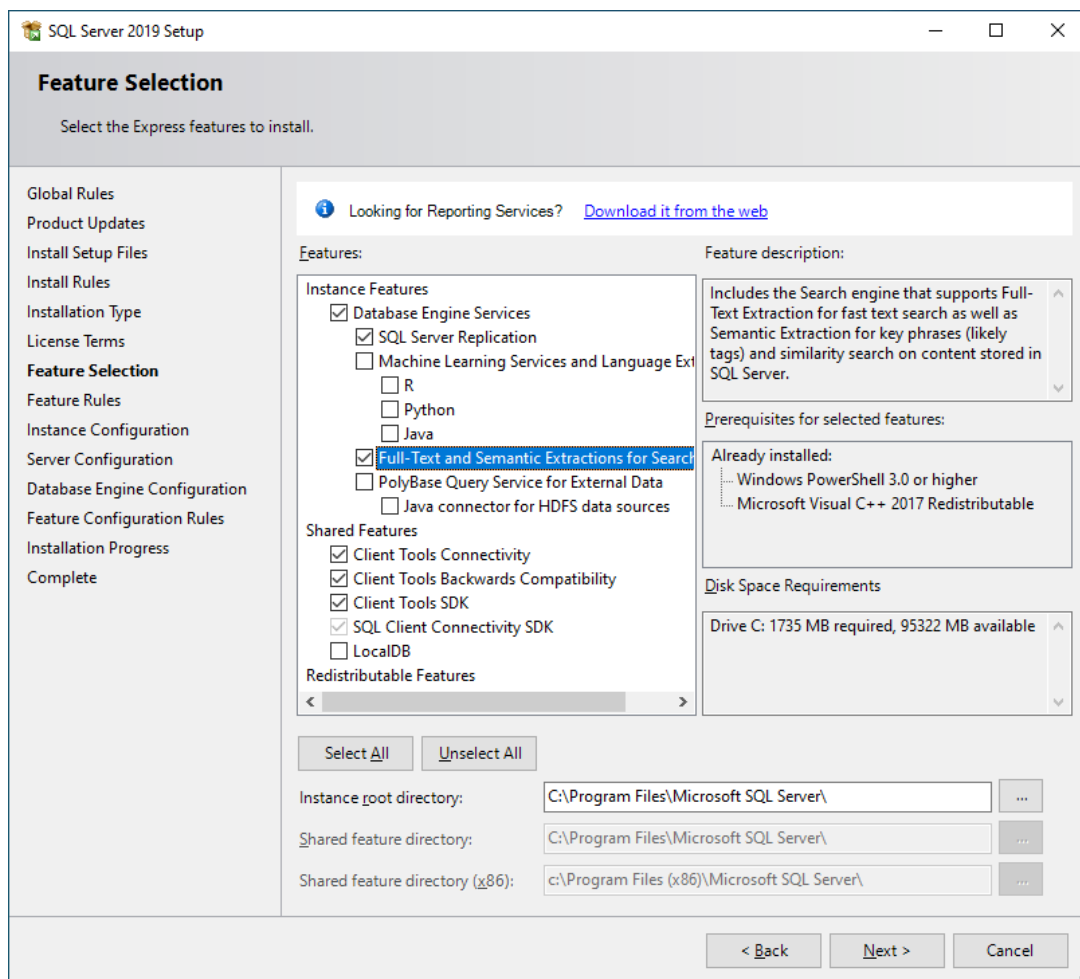
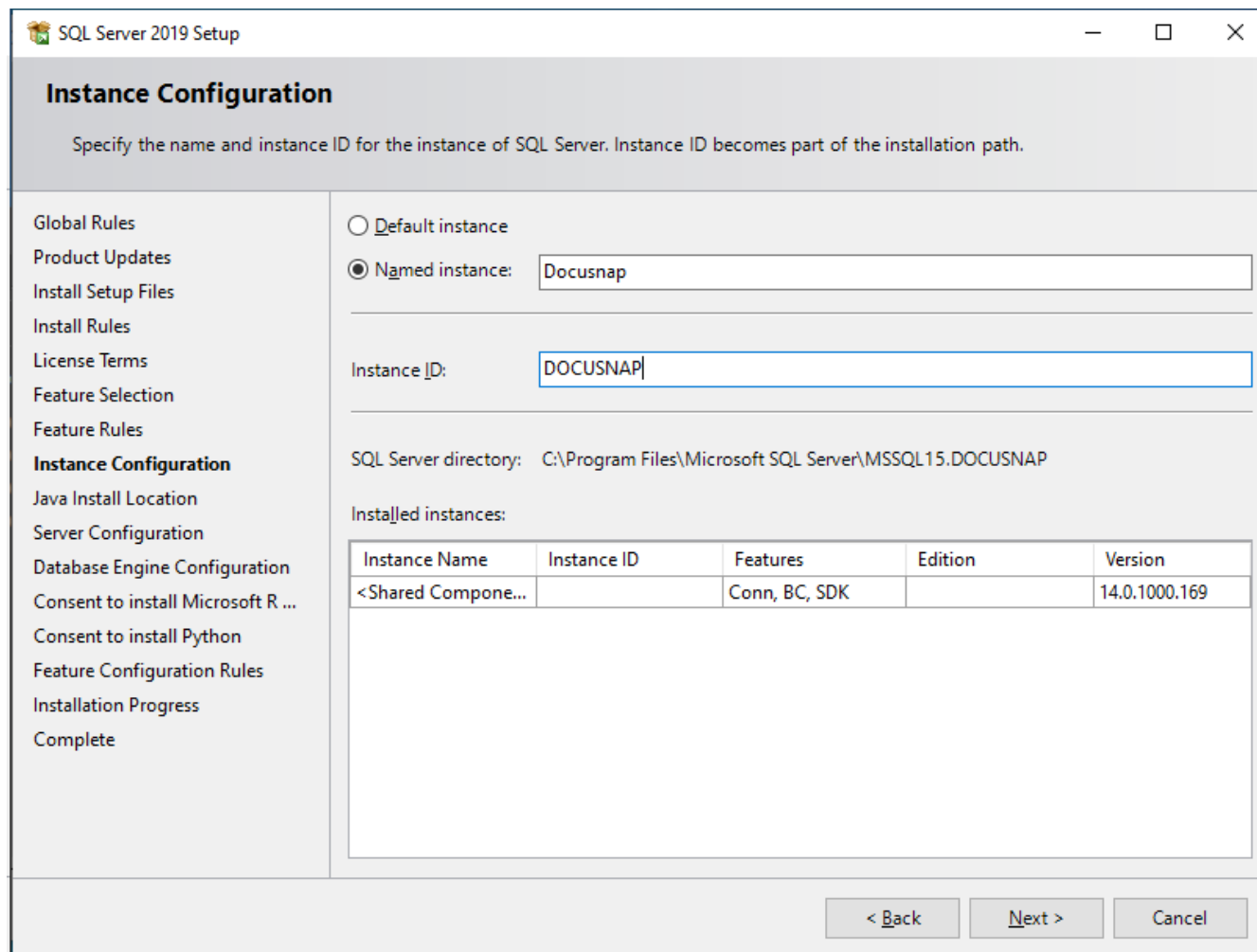


Fig. 5 – Feature Selection

### 5.1.3 INSTANCE CONFIGURATION

Within the instance configuration, you can either use the default instance name (MSSQLSERVER) or define your own instance name.



The screenshot shows the 'Instance Configuration' window of the SQL Server 2019 Setup. The window title is 'SQL Server 2019 Setup'. The main heading is 'Instance Configuration'. Below the heading, it says 'Specify the name and instance ID for the instance of SQL Server. Instance ID becomes part of the installation path.'

On the left, there is a navigation pane with the following items: Global Rules, Product Updates, Install Setup Files, Install Rules, License Terms, Feature Selection, Feature Rules, **Instance Configuration** (selected), Java Install Location, Server Configuration, Database Engine Configuration, Consent to install Microsoft R..., Consent to install Python, Feature Configuration Rules, Installation Progress, and Complete.

The main area contains the following configuration options:

- ☐ Default instance
- ☒ Named instance:
- Instance ID:
- SQL Server directory: C:\Program Files\Microsoft SQL Server\MSSQL15.DOCUSNAP
- Installed instances:

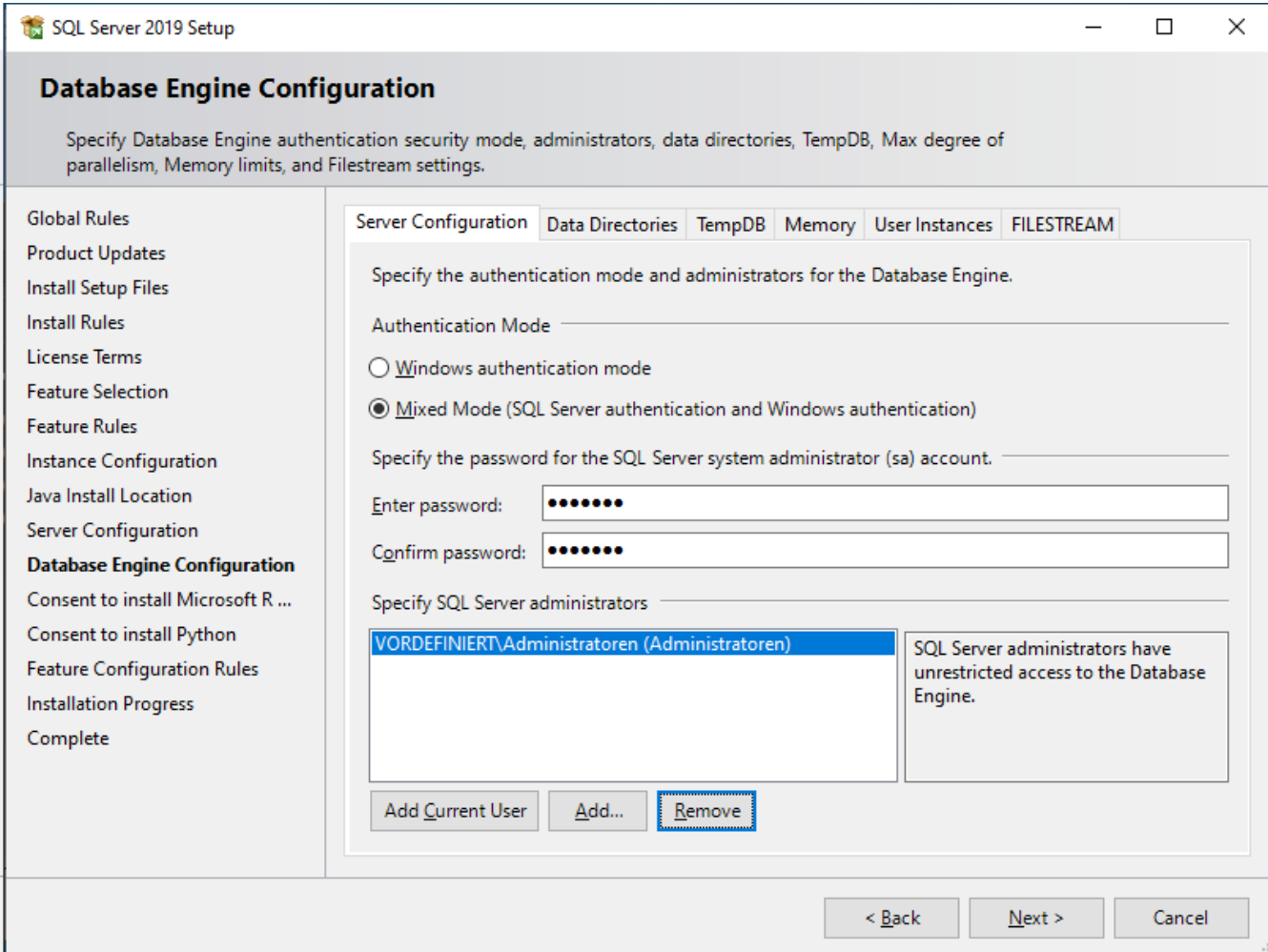
Instance Name	Instance ID	Features	Edition	Version
<Shared Compone...		Conn, BC, SDK		14.0.1000.169

At the bottom right, there are three buttons: '< Back', 'Next >', and 'Cancel'.

Fig. 6 - SQL Server Installation - Instance Configuration - Choose Instance Name

### 5.1.4 DATABASE MODULE CONFIGURATION

Please select the mixed mode authentication mode and assign a password for the SQL Server system administrator account (sa).



**SQL Server 2019 Setup**

## Database Engine Configuration

Specify Database Engine authentication security mode, administrators, data directories, TempDB, Max degree of parallelism, Memory limits, and Filestream settings.

Global Rules  
Product Updates  
Install Setup Files  
Install Rules  
License Terms  
Feature Selection  
Feature Rules  
Instance Configuration  
Java Install Location  
Server Configuration  
**Database Engine Configuration**  
Consent to install Microsoft R ...  
Consent to install Python  
Feature Configuration Rules  
Installation Progress  
Complete

Server Configuration | Data Directories | TempDB | Memory | User Instances | FILESTREAM

Specify the authentication mode and administrators for the Database Engine.

Authentication Mode

☐ Windows authentication mode

☒ Mixed Mode (SQL Server authentication and Windows authentication)

Specify the password for the SQL Server system administrator (sa) account.

Enter password: .....

Confirm password: .....

Specify SQL Server administrators

VORDEFINIERT\Administratoren (Administratoren)

SQL Server administrators have unrestricted access to the Database Engine.

Add Current User | Add... | Remove

< Back | Next > | Cancel

Fig. 7 - SQL Server Installation – Database Engine Configuration – Active SA User

Don't forget to take care of a data backup for the Docusnap database. Either via the SQL server itself or via backup software in the company.

## 5.2 CONFIGURING SQL SERVER EXPRESS

### 5.2.1 SQL SERVER NETWORK CONFIGURATION

SQL Express instances are not configured for remote access by default. However, if you are running a Docusnap client outside the Docusnap server, it requires remote access to the database. To do this, start the SQL Server Configuration Manager.

Navigate as follows:

- SQL Server Network Configuration - Protocols for "INSTANCE NAME"

Enable TCP/IP.

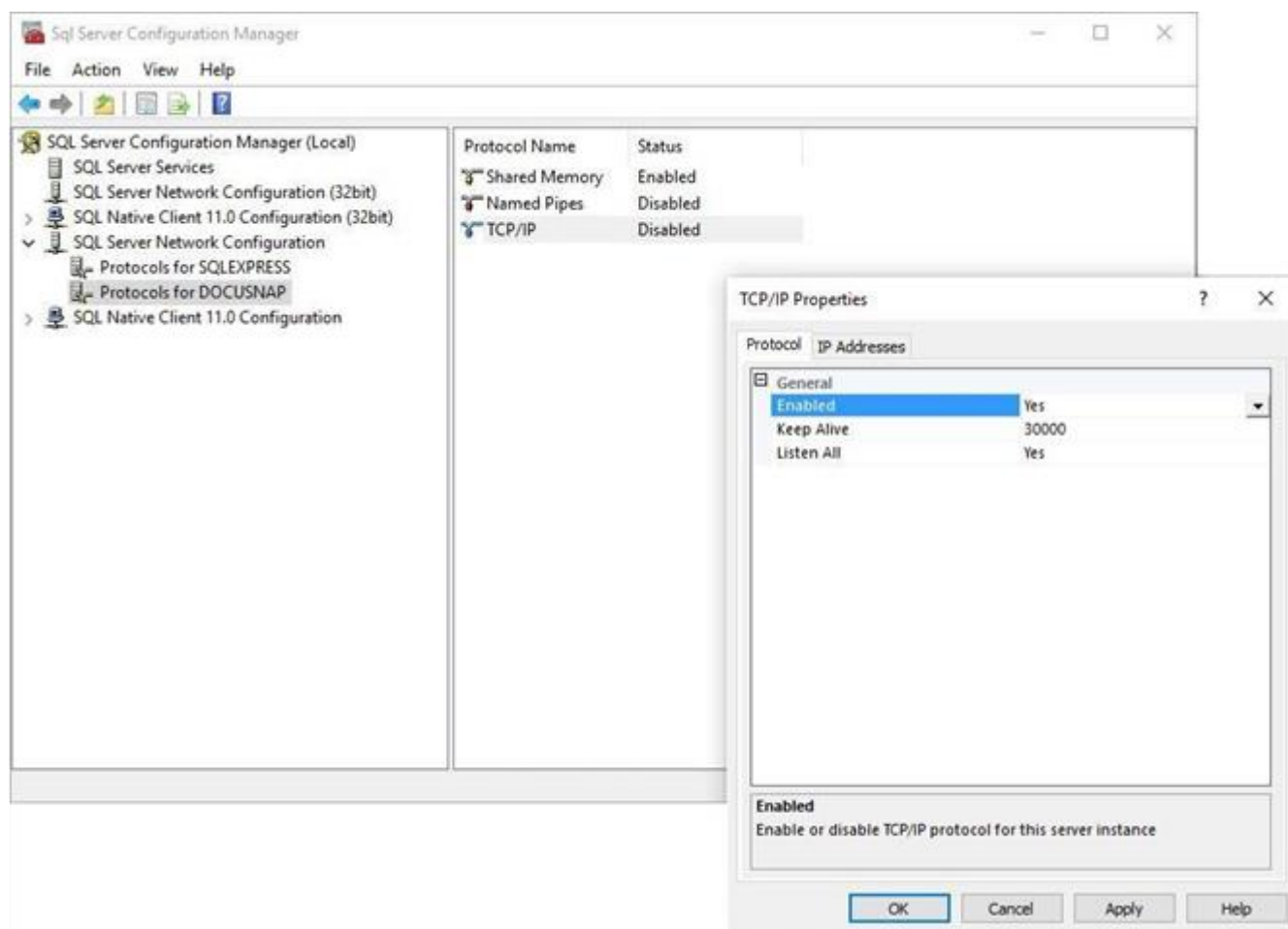


Fig. 8 - SQL Server Express Configuration - SQL Server Network Configuration

## 5.2.2 STARTING THE SQL BROWSER SERVICE

This step is necessary for the listing of the SQL Server in the Docusnap configuration and for the negotiation of the communication port. Please set the start mode of the service to Automatic and then start the SQL Server Browser service.

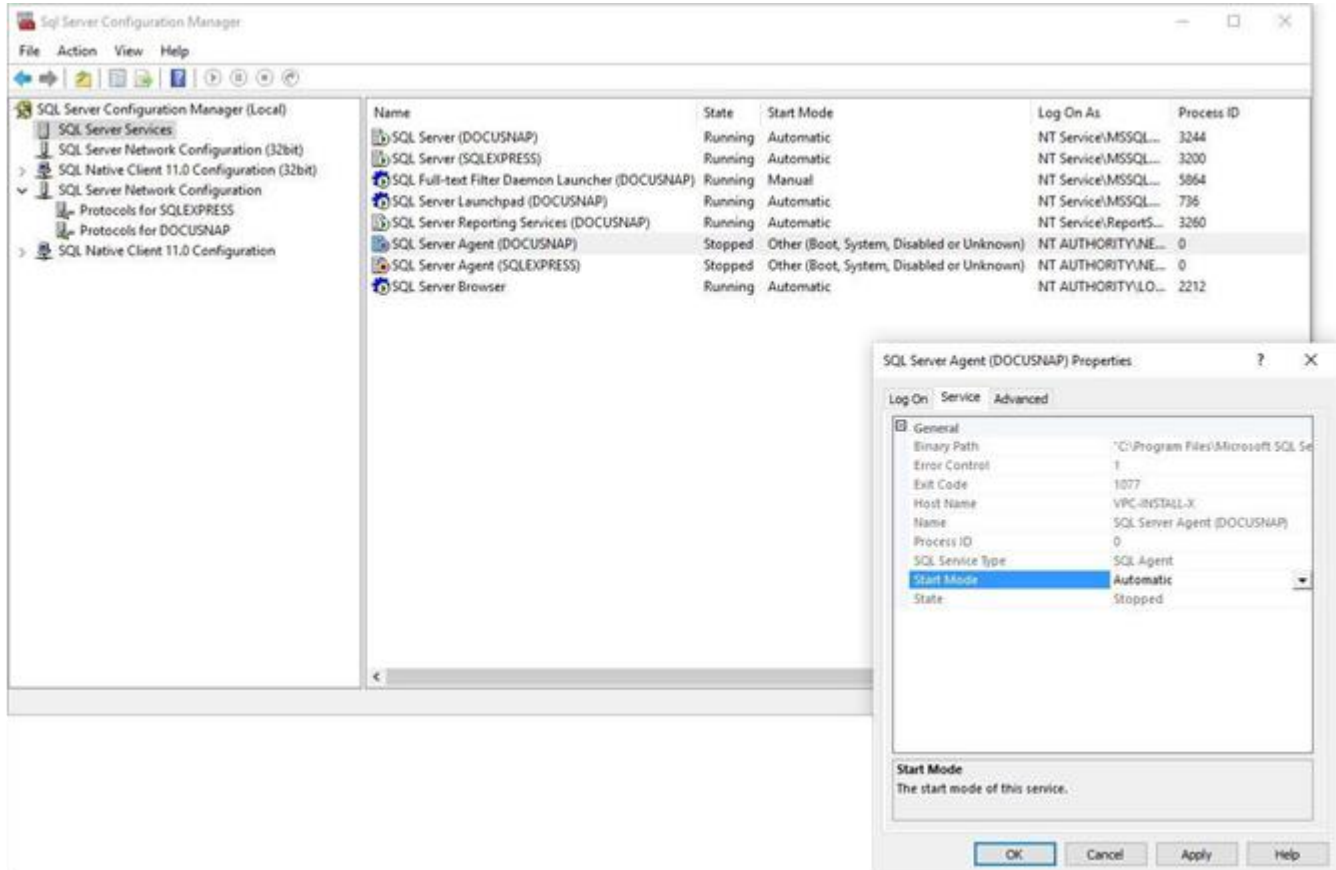


Fig. 9 - SQL Server Express Configuration - SQL Server Browser Service

### 5.2.3 DATABASE USERS AND PERMISSIONS

The Docusnap database itself is not created via SQL Management Studio, but automatically during the initial configuration of Docusnap. Please note that it is only possible to assign user rights to the database after it has been created.

The users who connect to the Docusnap database must have `db_owner` permissions.

In the following example, the SQL Server Management Studio first creates an SQL user **Docusnap** and then assigns it membership in the `db_owner` role for the Docusnap database.

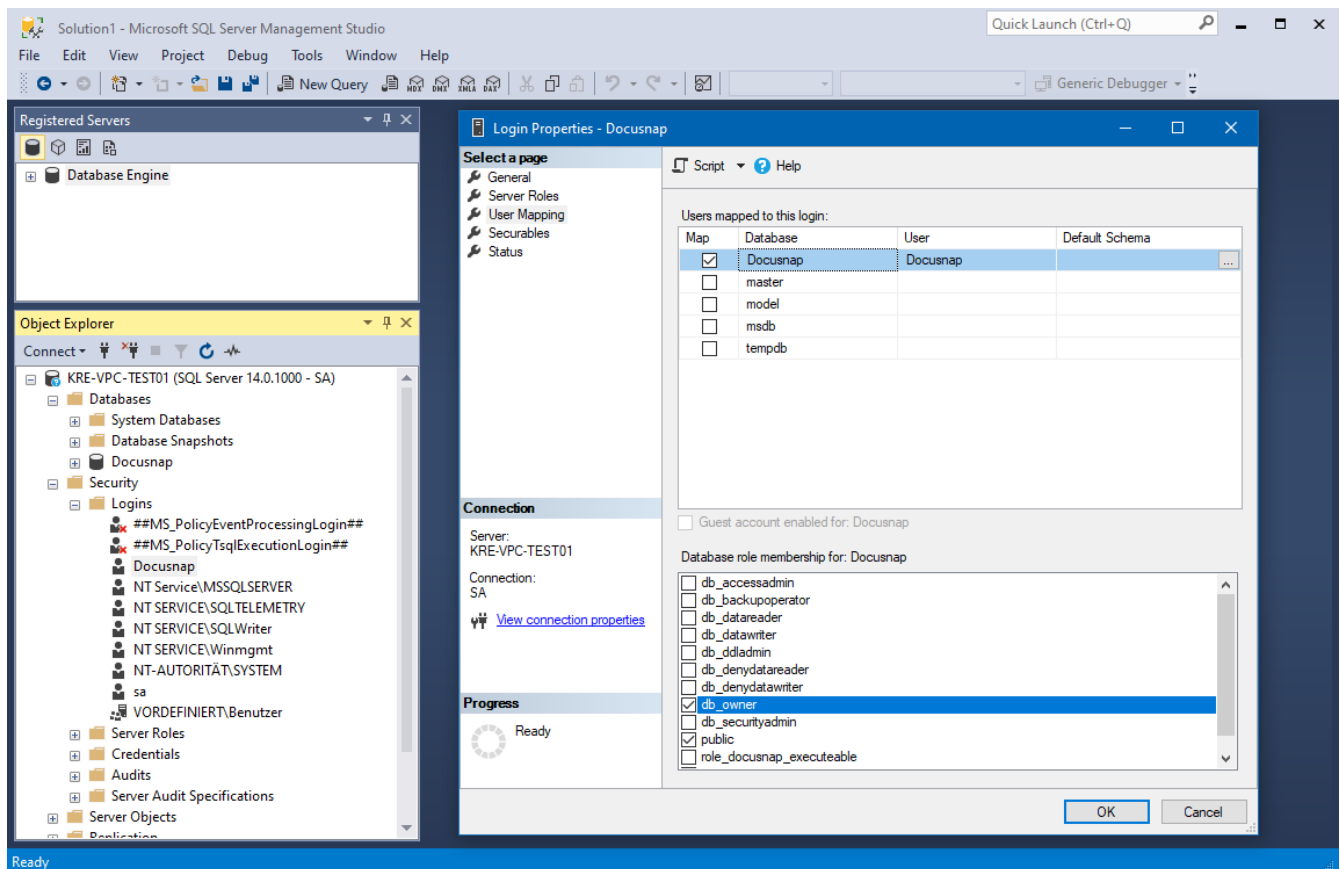


Fig. 10 - SQL Server Express Configuration - Database permissions

To use SQL Server authentication, SQL Server and Windows authentication mode must be enabled for mixed authentication.

When using Windows authentication mode only, all accessing users or groups must be authorized for access in SQL Server Management Studio. This applies in particular to the service account used for the Docusnap Server Service.

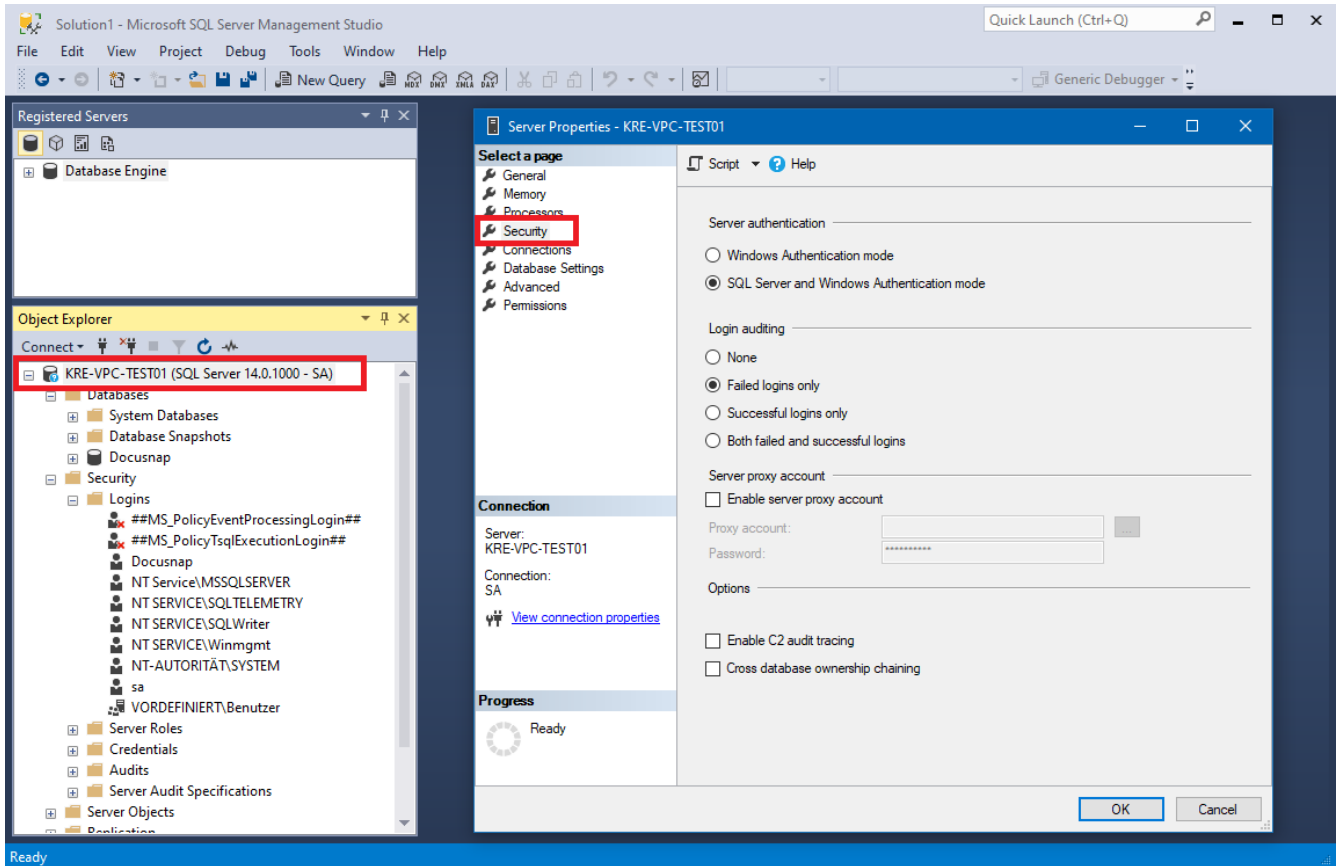


Fig. 11 - SQL Server Express Configuration - Database authentication

## 5.2.4 ENABLING SQL SERVER IN THE WINDOWS FIREWALL

In order to access the SQL Server and the Docusnap database via the network, a corresponding firewall rule must be activated for the SQL Server and SQL Browser Service when the Windows Firewall is activated.

You create the firewall rules as follows:

Control Panel - Windows (Defender) Firewall - Advanced Settings - Right Click Inbound Rules

- Rule type = Program
- Program - This program path:
  - `%ProgramFiles%\Microsoft SQL Server\MSSQL15.MSSQLSERVER\MSSQL\Binn\sqlservr.exe`
  - The path can be different - MSSQL14.DOCUSNAP - Docusnap is the name of the SQL instance and 14 is the version number of the SQL Server
  - Furthermore, the installation directory may differ

Repeat the procedure for the sqlbrowser.exe, which can be found in the following path by default:

`%ProgramFiles(x86)%\Microsoft SQL Server\90\Shared`

### 5.3 OPTIONAL STEP: UPDATING YOUR LOCALDB TO SQL SERVER (EXPRESS)

After the installation of Microsoft SQL Server Express or a fully-featured Microsoft SQL Server with Management Tools, you can add your local DB to it.

The local database (\*.mdf and \*.ldf files) is located in the user directory of the user who installed the local database and Docusnap.

The two files must be copied to the SQL server. You can use Microsoft SQL Server Management Studio to append them. Use a user with sysadmin permissions (SA or similar).

Right click on Databases - Attach

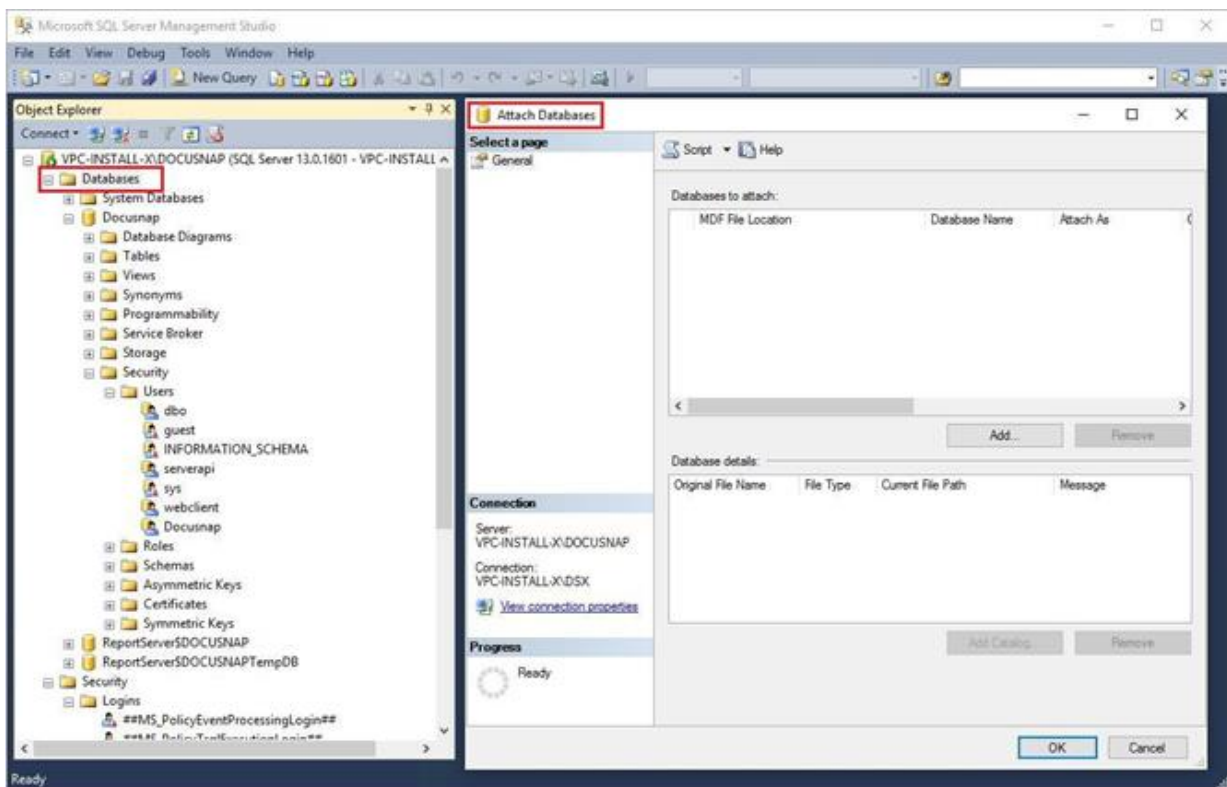


Fig. 12 - Updating the LocalDB to SQL Server

Now, click Add to add the file location and select the \*.mdf file.

The Attach Databases panel shows information related to the database. Here, you can e.g. change the database name in the Attach as section.

## 6. PROVIDING DEMO DATA

As already described in the chapter [Step 3 - Database](#), you can import demo data when you create a new Docusnap database.

If you confirm the selection regarding the DocusnapSports Demo Company, you will find two clients in your database. The client DocusnapSports cannot be used any further and will only provide you with demo data and will not be taken into account in the license count.

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## Version history

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Date	Description
September 05, 2016	Adaptations according to RTM Docusnap X
September 27, 2016	Docusnap Server Revision
October 25, 2018	Screenshots updated; New architecture of the web browser
July 26, 2019	Screenshots and texts updated New chapter added - Setting up a Central Configuration File
August 22, 2019	Added a note in chapter 3.2 regarding the configuration of the server service.
January 27, 2020	Adding the NPCAP driver path; Correcting the UseConfig parameter in the central configuration; Restoring the DocusnapDemo database
May 05, 2020	Version 2.0 - Revision of the HowTos for Docusnap 11
November 04, 2021	Version 2.1 – Added another possibility of a central configuration file, SQL server installation extended by full text search
July 12, 2022	Version 2.2 – System requirements updated (.NET Framework 4.8)
December 14, 2022	Version 2.3 – Revision of the HowTo for Docusnap 12
December 5, 2023	Version 3.0 – Revision of the HowTo for Docusnap 13

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