



# Files over the Web Setup Guide

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## 12d Synergy Files over the Web Setup Guide

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# 1 OVERVIEW

12d Synergy allows you to transfer data to and from external users who do not have access to your 12d Synergy server. This is particularly useful for issuing and drawing management, as well as for receiving large files that are not suitable for email. 12d Synergy achieves this by acting as a small web server.

This document is intended to be a technical document.

## 2 TERMINOLOGY

### External Address

Publishing will need to use the external address of your network. This is the IP Address or domain name that identifies your external facing router to the public internet.

### Domain Name

A domain name is a cosmetic address, such as [www.google.com](http://www.google.com), that translates to an ip address.

### Port

A port is a unique 4-6 digit number that identifies the application to the network. Ports will need to be allowed through any firewall software on the server and any external firewalls / routers.

Please note that it is a good idea to use standard port numbers to avoid issues with third party proxies and outgoing firewalls. Standard ports for http are 80 and 8080, or for HTTPS, 443 or 8443.

### HTTPS

HTTPS is a form of secure web based data transfer. It encrypts your data using an SSL Certificate. Using HTTPS, you know your published data will be sent securely. It is recommended that you always use HTTPS for file transfer over the internet.

### Certificates

SSL Certificates are required to use HTTPS. They help to validate that the server the user is connecting to is valid and to encrypt the data. Certificates be purchased from a third party Certificate Authority for a small fee, or we can help you generate one via Self Signing. **Be aware that Self Signing may result in warning messages being displayed to the end user.**

Please note that SSL Certificates should be keyed to a domain (eg: [files.mycompany.com](http://files.mycompany.com)), not an ip address

# 3 SETTING UP FILES OVER THE WEB

## 3.1 What you will need

To set up Files over the web, you will need

1. Your external address
2. The port number to use
3. A certificate, if using HTTPS
4. An optional redirect port number, if using HTTPS
5. The service account running 12d Synergy to be an administrator

## 3.1 Basic Configuration

To set up Files over the Web, follow these steps:

1. Open the 12d Synergy Administrator
2. Go to the “System Settings” section
3. Select “Files over the Web”
4. Tick “Allow file transfers over the web”
5. Specify your external address
6. Specify the port number to use (keep in mind firewall restrictions)
7. Open the port in your external firewall and forward it to your 12d Synergy server  
This step is dependent on your router setup.

## 3.1 Setting up Publishing

If you want to set up publishing, follow these steps:

1. Tick on “Allow publishing”
2. Define a relative server path – this is cosmetic only, and provides a URL base for any publishing file requests  
The final URL will be shown in the “Path Base” field
3. Define a location for your absolute package path. This is where publishing will store zipped file packages. **This path should be a path seen by your server, such as a local hard drive on the server or a network drive via a UNC path**
4. Other settings such as web page templates can be configured here but are outside the scope of this document

## 3.1 Setting up Web File Drops

If you want to set up web file drops, follow these steps:

1. Tick on “Allow file uploads”
2. Define a relative server path – this is cosmetic only and provides a URL base for any web drop requests
3. Other settings such as colouring etc can be configured here but are outside the scope of this document

## 3.1 Setting up HTTPS

To set up HTTPS, you will need to register the certificate with 12d Synergy. This can be achieved under the "SSL Certificates" tab in the settings area of the 12d Synergy administrator. Whether we help you purchase the certificate, if you self-sign or bring your own, you will need to get the thumbprint of the certificate. This is a unique identifier required by Windows for setting up your certificate. This can be found under the "Existing Certificate" tab once you've registered and restarted the service.

### 3.1.1 Backwards compatibility with V2 via HTTP Redirect

V2 did not support HTTPS and only published data over HTTP. This may mean V2 servers may still be publishing HTTP links. If you switch to HTTPS on the same port, these links will be broken and will no longer work. If this does not matter, or you are sure you have no links, then you don't need to worry. But if you do need to preserve old links, you will need to take the following steps:

1. Identify a new, unique port for HTTPS
2. Setup HTTPS using the new port
3. Turn on HTTP Redirect
4. Set the HTTP Redirect port to the port number you were using previously

## 4 TROUBLESHOOTING

Testing that publishing is working can be difficult, as there are many different points of failure, and the external address of your server is not often usable from inside your network. Try the following steps.

### 4.1.1 Turn off HTTPS

HTTPS adds a level of complexity to the process that may make it difficult to troubleshoot. While you are testing, turn off HTTPS and only publish unimportant documents. You can always turn it back on when you've got it working!

### 4.1.2 Try access the server from a network machine

To do this, take the publishing link generated and change the address to the name of your server.

So instead of: [https://files.mycompany.com/publishing/...](https://files.mycompany.com/publishing/) try use [http://MyLocalIPAddress/publishing/...](http://MyLocalIPAddress/publishing/)

If you can't access the server internally, this is likely a problem on a software firewall on the server itself (such as the Windows firewall).

### 4.1.3 Try from outside your network

Try use a third party device that isn't connected to your network, like a mobile phone. Your problems may be occurring because you are trying to reach an address on the public internet from inside your own network, which is not generally possible.

If you can access the server internally but not externally, this is likely an issue at your external firewall and the port may not be forwarding properly.