



DocuSnap X - User Manual

English Version

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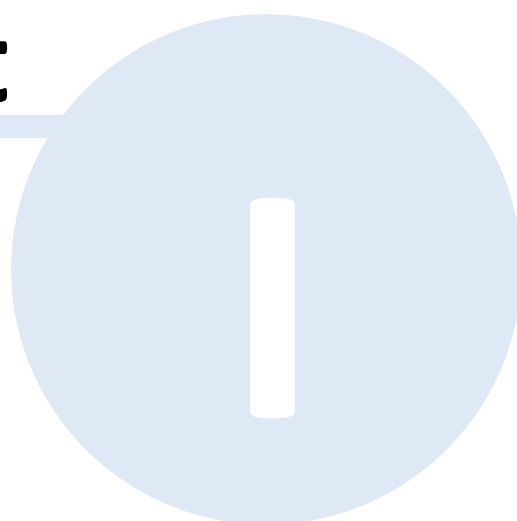
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Part



1 Welcome

Welcome to Docusnap X

Thank you very much for purchasing Docusnap X.

In practice, the terms IT documentation and IT analysis are generally restricted to the inventory process and maybe the visualization of existing hardware and software.

Docusnap X greatly broadens the terms IT documentation and IT analysis by adding significant features:

Building on the process of inventorying the entire IT environment (not just the hardware and software) and the visualization of overview maps using Microsoft Visio, Docusnap X supports the reporting of the results using several standardized formats (Microsoft Word & Excel, PDF and HTML files, among others).

Docusnap X generates meaningful and real-world reports and analyzes of the most diverse corporate departments.

In no time, Docusnap X analyzes effective permissions, compares the expected and actual states of installed licenses and provides additional organizational features, such as password and contract management.

Docusnap X combines optimum usability with maximum flexibility. Wizards guide the user through the intuitive user interface which is similar to Microsoft Office 2013.

Multiple users can work with Docusnap X concurrently. Customization to individual requirements is also possible.

1.1 Changes in Docusnap X

Docusnap was extended among other by the following functions:

[Azure und Office 365](#)

With Docusnap, information about [Azure](#) and [Office 365](#) can be inventoried.

[Business Structure](#)

An IT documentation throughout the organization through business processes to the physical infrastructure

[Physical Infrastructure Components](#)

Using Docusnap X the physical infrastructure such as rack or wiring can be completely mapped.

[EMC² Isilon](#)

Inventory of Storage Environment (EMC² Isilon)

Communication

Automatic detection and mapping of communication relations

License Management

Revision of License Management

Consolidation of Data Structures

In order to improve the clarity of Docusnap the different areas were grouped into four areas. Creating of the [concepts](#) and [diagrams](#) (in 6.3 called relations) have been moved to the data structure *Documentation*.

The contents of the *Organization* area are now displayed in the data structure *Inventory* under the headings *Overview* and *Organization*.

Docusnap Discovery Service

By Docusnap Discovery Service inventory of other locations without additional Docusnap Installation can be performed on site. Using an online connections and encrypted data transmission, the complete coverage of all locations and customers is possible.

Docusnap Web

Read access to all the information via a Web browser using the Microsoft Internet Information Services (IIS).



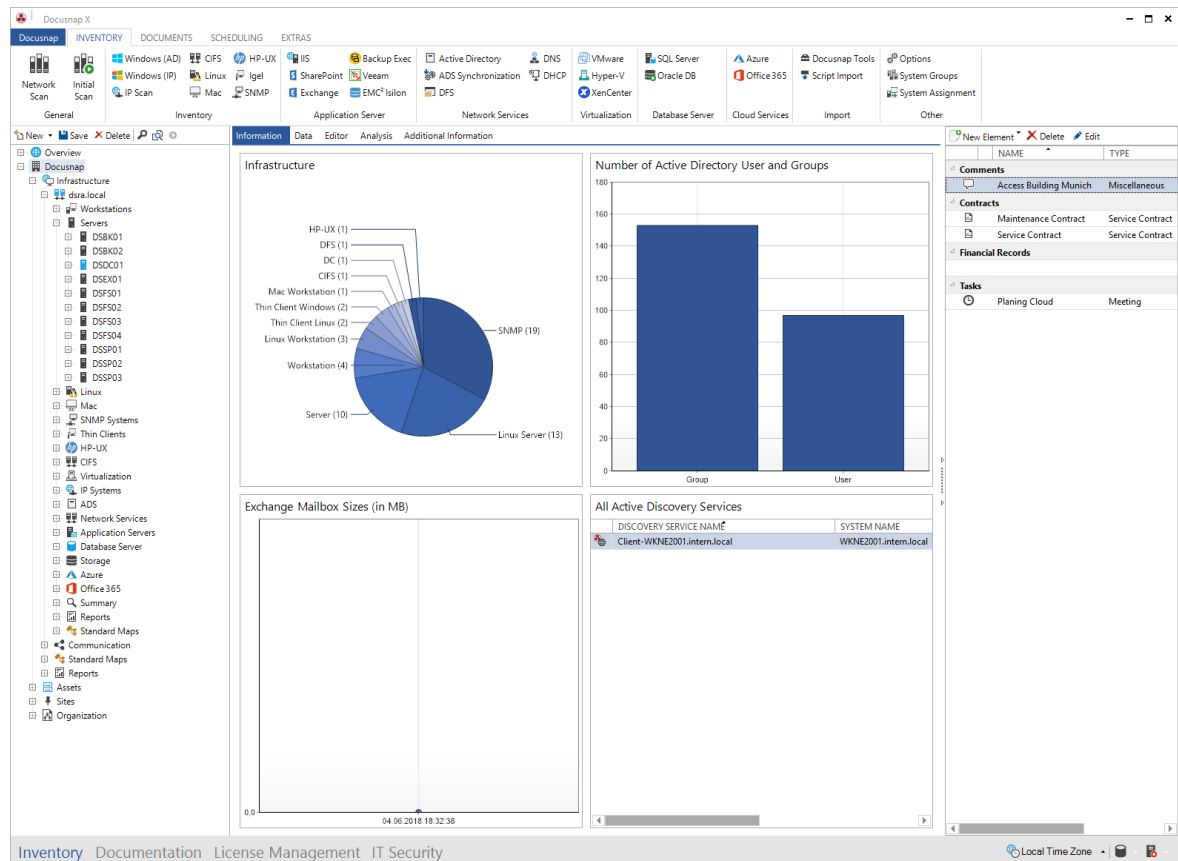
Part



2 Introduction

The Introduction section describes the initial installation of Docusnap and the system requirements. Then, the basic configuration required after the initial installation process will be discussed.

In addition, the essential features and modules of Docusnap will be explained briefly.



2.1 About Docusnap

Docusnap X captivates through its ideal mixture of many documentation and analysis components. Its focus lies on features that meet the everyday needs of information technology and relieves employees from routine jobs.

Docusnap Features

Automated, agent-free network inventory and IT documentation

Client / Server Operating Systems

Comprehensive IT documentation and inventory of all hardware and software

With Docusnap, you can inventory your workstations and server systems and create an all-encompassing documentation. Besides information on the device hardware, the operating system in use, the network settings, local users and groups, printers and file shares, Docusnap also collects information on installed software products.

Microsoft Windows	Linux	Mac OS X
Hardware and Software	Hardware and Software	Hardware and Software
Configuration	Server Configuration	Configuration
Security Settings	Apache, Samba, NFS, ...	Settings

Application Servers

Efficient documentation of business-critical applications

With Docusnap, you can quickly and easily inventory the Microsoft Exchange e-mail and groupware system, the Microsoft SharePoint portal solution, and the business-critical Microsoft SQL Server and Oracle database applications and document them in a comprehensive manner. For all application servers, extensive reports and overview plans can be produced.

Microsoft Exchange Server	Microsoft SharePoint	Databases
Mailboxes and Folders	PublicFarm Information	Databases, Users
Exchange Permissions	Web Applications	Tables, Views, Fields
Server Configuration	Permissions	Stored Procedures

Infrastructure

Inventory and documentation of entire IT networks

Every IT documentation is based on the inventory of network services such as DNS, DHCP, DFS, and ADS (Active Directory Services). Using SNMP, it is possible to scan further network devices, for instance switches, routers, or printers, and even firewalls. By performing inventory scans of virtualization solutions based on Microsoft Hyper-V, VMware ESX, or vSphere and Citrix XenCenter, you can include these business-critical applications into your documentation. The collection of data on the network infrastructure is rounded off by inventorying and documenting Veritas Backup Exec installations and Veeam.

Active Directory Services	DNS, DHCP and DFS	SNMP
Locations, Structures	DomainScopes, Active Leases	SNMP V1/V2/V3
Logical ADS Structure	DHCP Maps	Layer 2 Topology
Group Policies	Forward Zones, Records	DNSThird-party MIBs

Internet Information Services	Virtualization	Backup
Server Settings	VMware	Data Backups
Web Pages	Hyper-V	Veeam
Applications	XenCenter	Backup Exec

IT Analysis

Efficient analysis of permissions and licenses

Docusnap allows you to map your entire software license management. You can not only retrieve data on the installed software products, but also store and map purchased software licenses and maintenance agreement information. Docusnap analyzes this information and thus provides a comprehensive survey of the current licensing situation.

Docusnap allows you to inventory and document permissions in Windows file systems, Microsoft Exchange, and SharePoint. Using the Docusnap Permission Analysis module, these permissions can be analyzed and evaluated. For this purpose, the software features tabular and graphical evaluations as well as a variety of reports.

License Management	Permission Analysis
Automatic License Scan	SharePoint Permissions
Contract Assignment	Exchange Permissions
Comparison of Actual / Expected Data	File System Permissions

Customization and Ease of Use

Tailor and extend Docusnap to suit your requirements

Integrate your corporate design into Docusnap. For specific IT documentation requirements, Docusnap allows you to extend the CMDB (Configuration Management Database) by adding custom classes or objects. Adapt existing reports and create new ones in the Report Designer. The multi-tenant capability and an integrated permissions system round off the Docusnap software.

Intuitive User Interface	Customizing	Design
Multi-tenant Capability	Additional Data Structures	Integrated Designer
Multi-language Capability	Object Classes	User-defined Inventory Definition
Multi-user Capability	Data Entry Forms	Customizing

2.2 Conventions

In order to improve the readability of this document, the following conventions apply:

Normal text uses the Calibri font. Names of buttons, checkboxes, etc. are written in *italics*.

Code samples are formatted in `Courier New`.



Some sections feature tips for using Docusnap. These tips are indicated by a light bulb.



Warning sections are highlighted by a warning sign. Warnings refer to issues that should be taken into consideration when working with Docusnap.



Text that contains additional information is highlighted by an information sign.

2.3 System Requirements

Docusnap X & Docusnap X Server Host System

System requirements for computers on which Docusnap X or Docusnap X Server is installed:

Operating Systems Windows 7 SP1

	Windows 8, 8.1
	Windows 10
	Windows Server 2008 SP2/ 2008 R2 SP1
	Windows Server 2012 / 2012 R2
	Windows Server 2016
	Windows Server 2019
RAM	>512 MB, recommended >= 2GB
CPU	> = 2 Cores
Resolution	min. 1024 x 768, recommended >= 1280 x 1024
.Net Framework	Version >= 4.6.1
Windows Installer	Version >= 4.5
Database	SQL Server 2008 Express, Standard, Enterprise
	SQL Server 2008 R2 Express, Standard, Enterprise
	SQL Server 2012 Local-DB, Express, Standard, BI, Enterprise
	SQL Server 2012 R2 Local-DB, Express, Standard, BI, Enterprise
	SQL Server 2014 Local-DB, Express, Standard, BI, Enterprise
	SQL Server 2016 Local-DB, Express, Standard, Enterprise
	SQL Server 2017 Local-DB, Express, Standard, Enterprise
Microsoft Office	Office >= 2007

No external programs are required for generating documents and maps.

To use Connect V2, at least SQL Server 2012 or higher is required.

To view the documents and maps, programs that support the following file formats can be used:

- .docx
- .xlsx
- .html
- .pdf
- .odt
- .vsd

DocuSnap X Discovery Service Host System



Introduction

System requirements for computers on which Docusnap Discovery Service is installed (without Server or Docusnap Client):

Component	System Requirements
Operating Systems	Windows 7 SP1
	Windows 8, 8.1
	Windows 10
	Windows Server 2008 SP2
	Windows Server 2008 R2 SP1
	Windows Server 2012
	Windows Server 2012 R2
	Windows Server 2016
	Windows Server 2019
RAM	min. 512 MB, recommended >= 2GB
CPU	> = 2 Cores
Resolution	min. 1024 x 768
.NET Framework	Version >= 4.6.1
Windows Installer	Version >= 4.5

Docusnap X Web Host System

System requirements for computers on which the Docusnap Web is installed:

Component	System Requirements
Operating Systems	Windows 8, 8.1
	Windows 10
	Windows Server 2008 SP2
	Windows Server 2008 R2 SP1
	Windows Server 2012
	Windows Server 2012 R2
	Windows Server 2016
	Windows Server 2019
RAM	min. 512 MB, recommended >= 2GB



.NET Framework Version >= 4.6.1

Windows Installer Version >= 4.5

Browser Requirements ([Web & Overview Maps](#))

System requirements for browsers to display Web Docusnap or documentation:

Component	System Requirements
Resolution	min. 1024 x 768 Pixel, recommended >= 1280 x 1024 Pixel
Browser	IE >= 10 Edge >= 13 Google Chrome >= 31 Mozilla Firefox >= 45, Aurora >= 50.0, ESR >= 45.3 (optionally the https-certificate has to import in FF manually) Opera >= 15

For documented devices ([target systems](#))

Requirements for the to be documented devices:

Operating Systems	Windows NT (with WMI CORE 1.5 for Windows NT 4) Windows XP Windows Vista Windows 7 Windows 8, 8.1 Windows 10 Windows Server NT (with WMI CORE 1.5 for Windows NT Server 4) Windows Server 2000 Windows Server 2003 Windows Server 2008 Windows Server 2008 R2 Windows Server 2012
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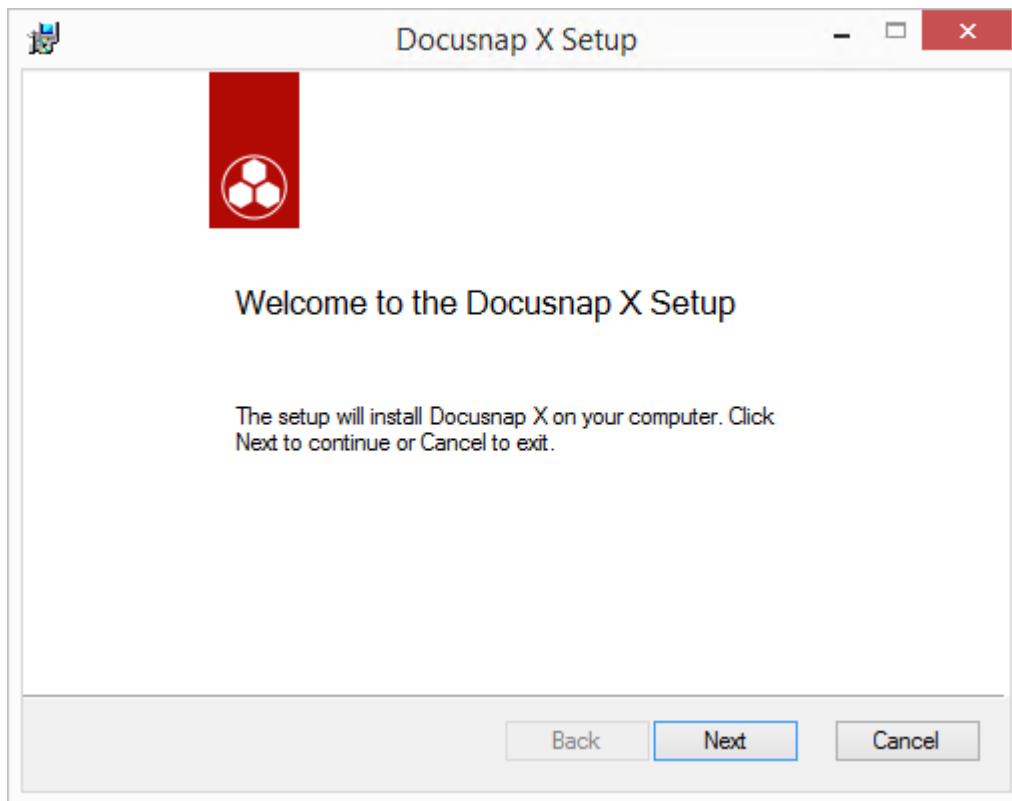
	Windows Server 2012 R2
	Windows Server 2016
	Windows Server 2019
	Linux (32 / 64 Bit) – SuSe
	Linux (32 / 64 Bit) – RedHat
	Linux (32 / 64 Bit) – Debian
	Linux (32 / 64 Bit) – Kubuntu
	Linux (32 / 64 Bit) – Ubuntu
	Linux (32 / 64 Bit) – CentOS
	HP-UX 11i v3
	Mac OS X
	IGEL Thin Clients (Windows & Linux, nur UMS SQL-Server DB)
Network Protocols	WMI
	LDAP (v.2)
	SNMP Version 1,2,3
	SSH (RSA-Keys supported)
Exchange Server	Exchange Server 2007
	Exchange Server 2010
	Exchange Server 2013
	Exchange Server 2016
	Exchange Server 2019
SQL Server	SQL Server 2000
	SQL Server 2005
	SQL Server 2008 / R2
	SQL Server 2012 / R2
	SQL Server 2014
	SQL Server 2016
	SQL Server 2017
VMware	vCenter 4.0, 4.1, 5.0, 5.1, 5.5, 6.0, 6.5, 6.7



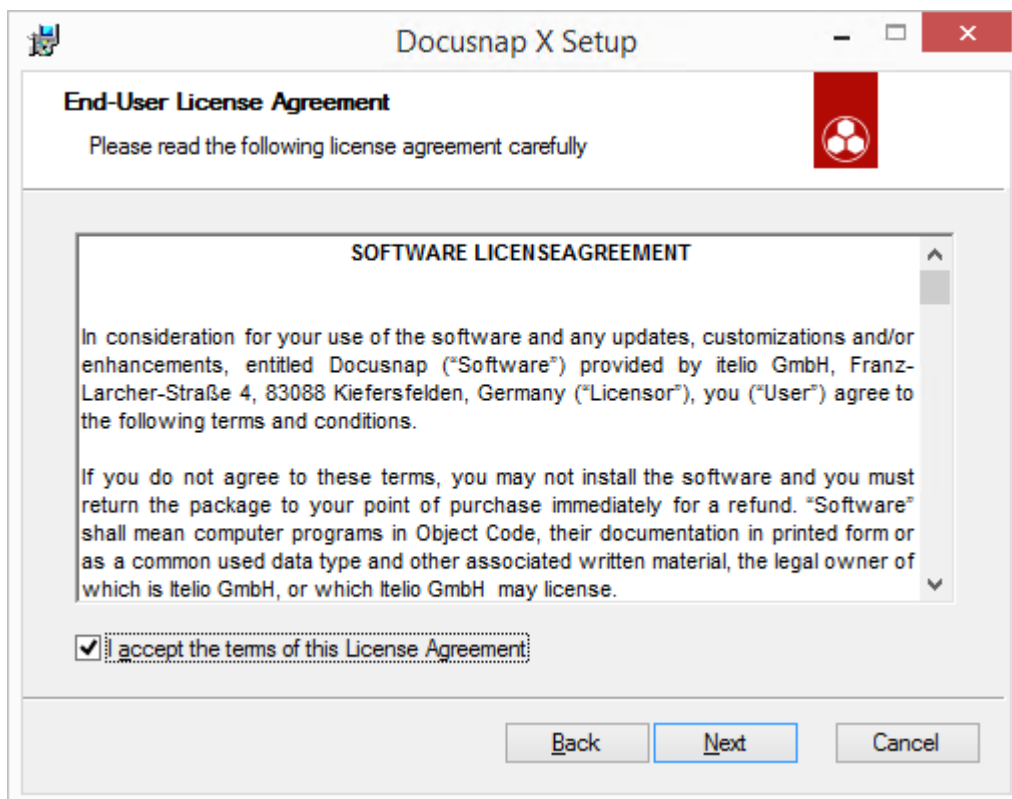
	ESX Server 4.0, 4.1, 5.0, 5.1, 5.5, 6.0, 6.5, 6.7
	VMware Server
DHCP/DNS	only Windows-based systems
Permission Analysis	Windows Systeme or CIFS/SMB emulations and Microsoft SharePoint Installations as well as Exchange 2007, 2012, 2013, 2016, 2019
Hyper-V	only Windows-based systems
Citrix XenCenter	XenServer 6, 7
	Hypervisor 8
VEEAM	VEEAM 8, 9, 9.5
Microsoft IIS	Version 6.0, 7.0, 7.5, 8.0, 8.5, 10
Microsoft SharePoint	SharePoint Server 2007, 2010, 2013, 2016, 2019
	SharePoint Services 3.0
	SharePoint Foundation
Symantec Backup Exec	Version 2010, 2012, 2014, 15, 16, 20
Oracle DBMS	Version 10, 11g, 12c, 18c, 19c
EMC ² Isilon	OneFS 8.0.0 or higher

2.4 Installation

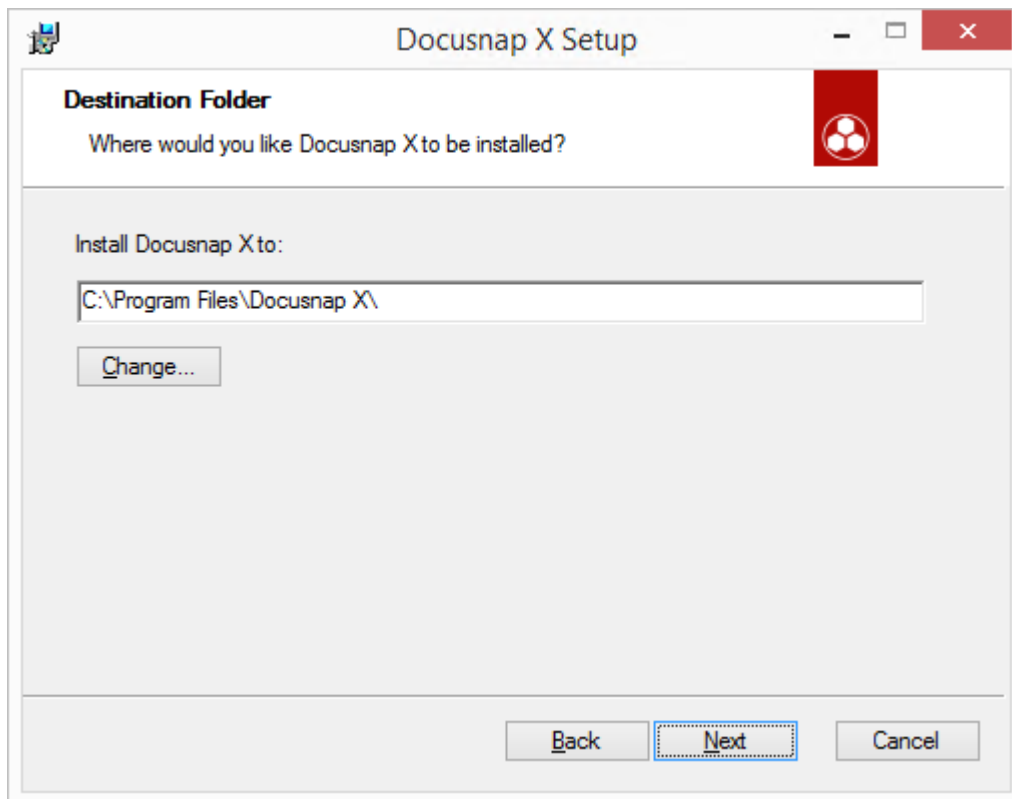
Executing the Docusnap.exe file starts the installation process for Docusnap X.



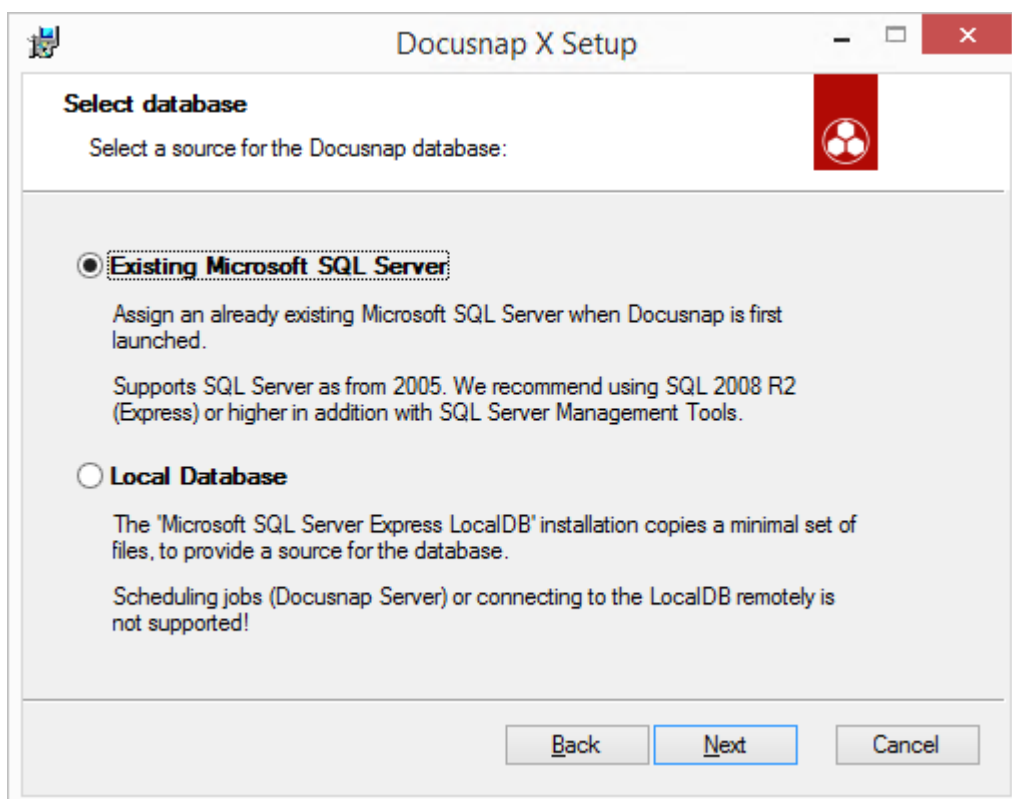
The *Next* button will only be enabled after license agreement has been accepted.



The next step lets you specify the Docusnap installation directory.



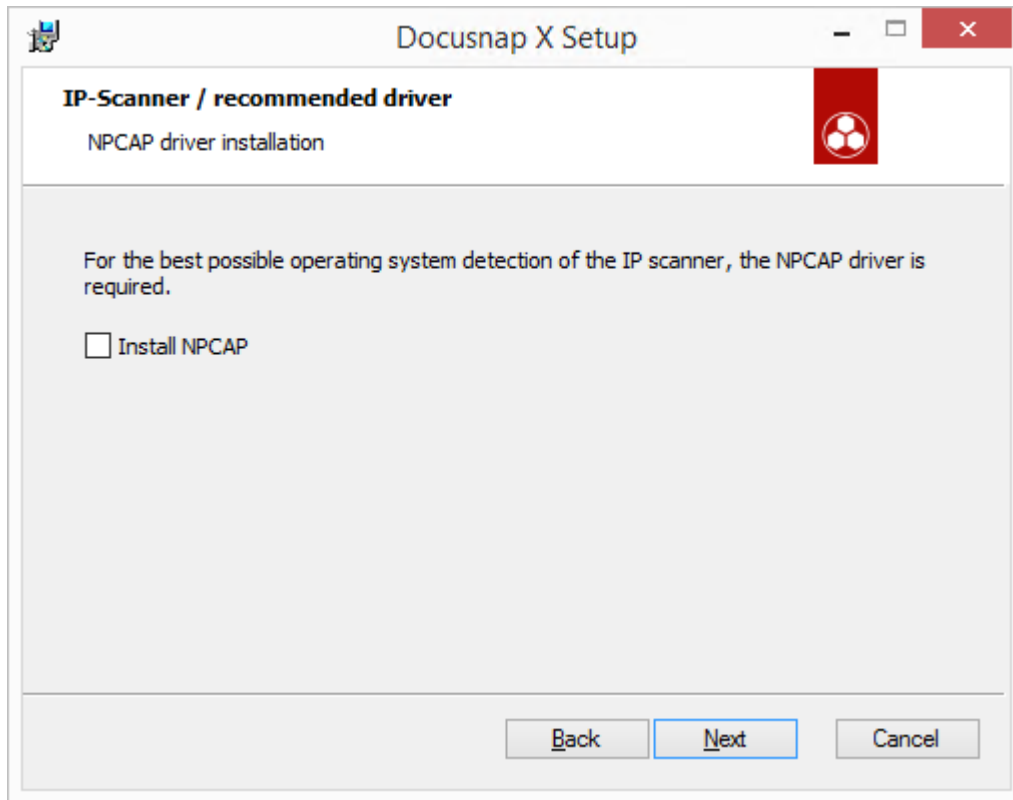
After the desired folder has been selected, the installation process can be started.



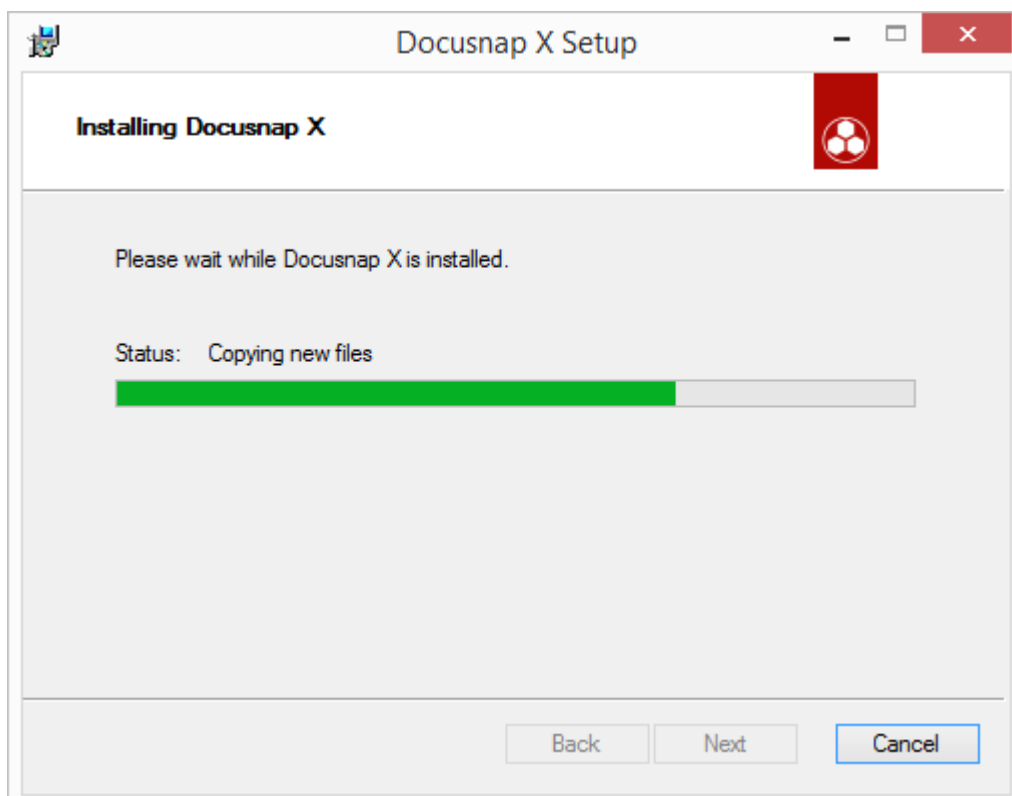
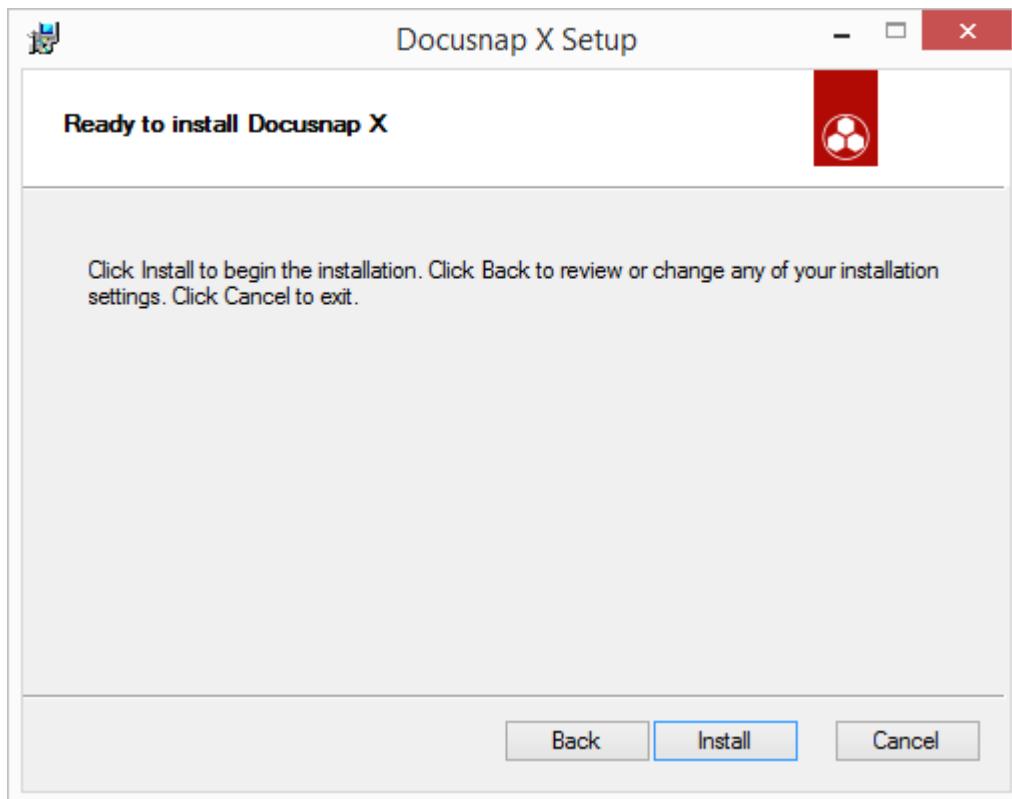
If the local database does not exist on the system, it can be created during the installation of Docusnap. The local database (Microsoft Server Express LocalDB) is a

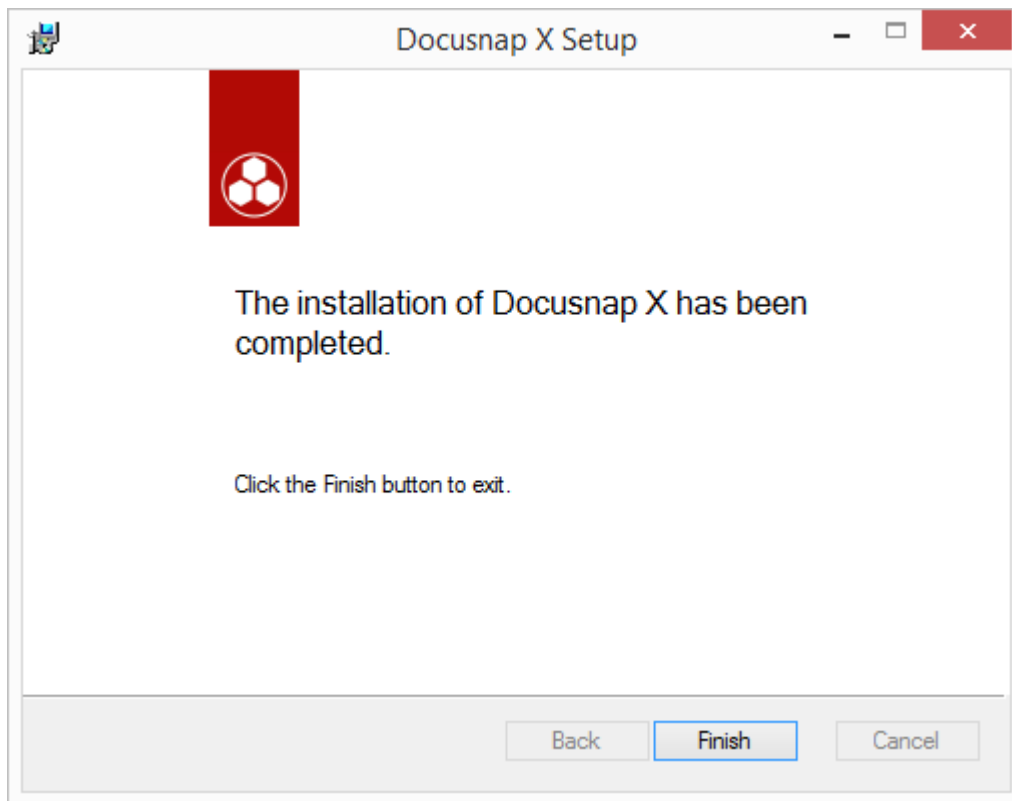
simplified version of SQL Server that can be used without having to perform complex or time consuming configurations.

It is recommended that the local database is used for testing purposes only or smaller databases.



Installing the Npcap driver improves the quality in detecting the operating system during the IP scan.





If the LocalDB installation is also required, the wizard starts to install after finishing the Docusnap wizard. This requirement can be selected on the "Database Selection" slide of the Docusnap wizard.

Silent installation

For silent installation, the parameter `/q` can be used, e.g. `Docusnap.exe / q`

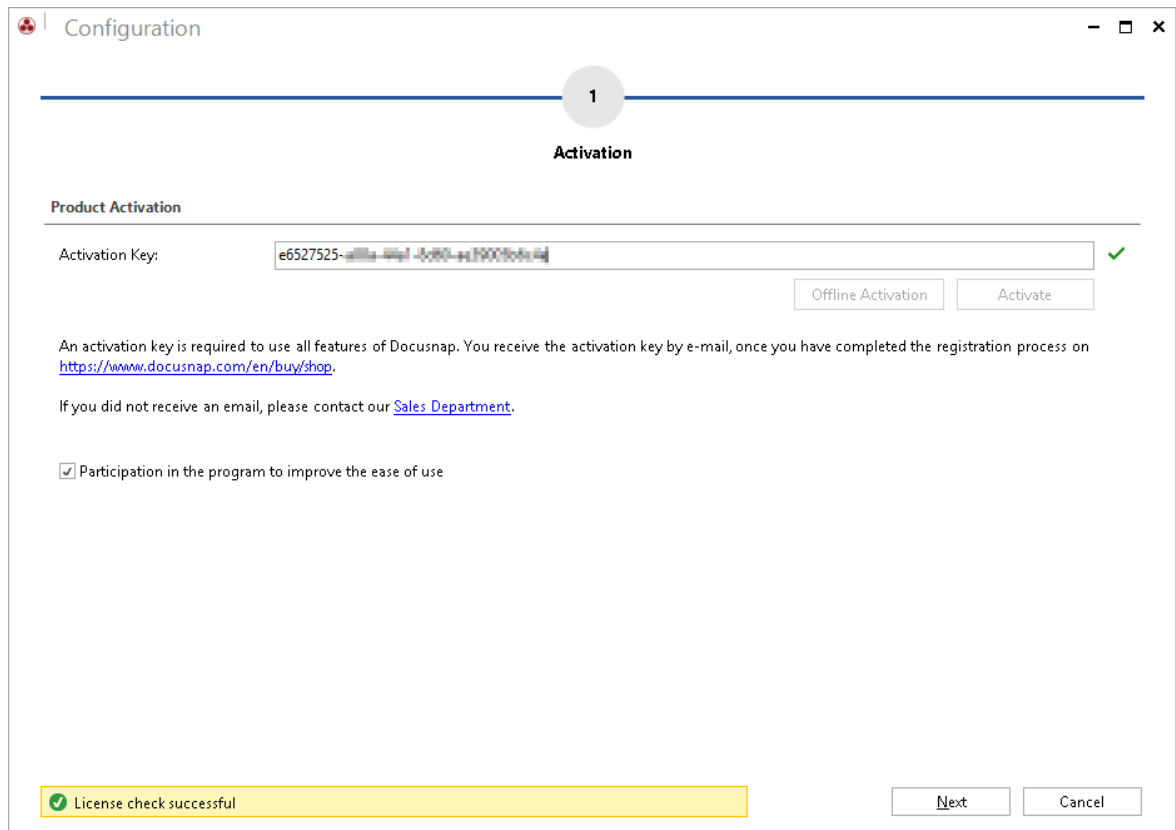
In order to display a progress dialog during the silent installation, the parameter `/qb` can be used, e.g. `Docusnap.exe / qb`

When you first start Docusnap the program needs to be activated manually for the respective system. To perform the activation as part of a Remote Installation, Docusnap can be activated after the installation via script using the command line with a parameter that contains the activation key. `-Activate=ActivationKey`

2.5 Getting Started

When you start Docusnap for the first time, the *Docusnap Start Wizard* opens to help you with the configuration of Docusnap for operation.

The first step consists in selecting the Docusnap license file. Docusnap can only be used with a valid license.



Insert in the Activation Key field the activation key received by e-mail. Click the Activate button, to check the license for validity.

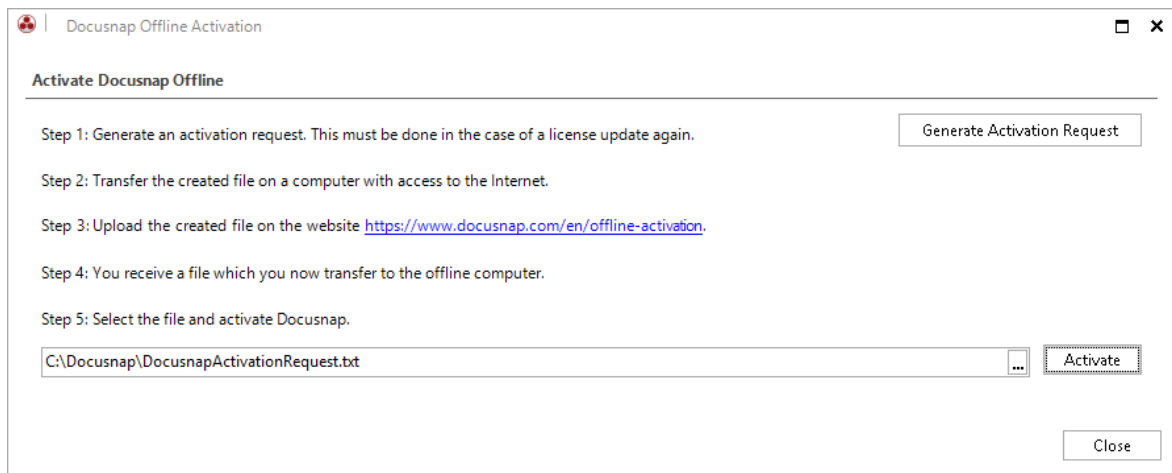
By using the offline activation it is possible to operate Docusnap in an isolated environment. In the first step it is necessary to enter the activation code provided in the configuration wizard. Then another dialog must be opened by clicking on "Offline activation", by means of which the file (*DocusnapActivationRequest.txt*) can be created. This file which contains the fingerprint of the isolated system.

In a second step, the file *DocusnapActivationRequest.txt* is to be uploaded to the Website <https://www.docusnap.com/en/offline-activation> in order to receive the final license file (*DocusnapOfflineLicense.txt*) for a successful activation of Docusnap.

After selecting the *DocusnapOfflineLicense.txt* within the configuration wizard, Docusnap can be activated by clicking the *Activate* button.

Should modifications to the license setup be required, such as the extension of the number of licensed systems, the complete process of generating an activation

request file, uploading it and importing the license file has to be repeated. Accordingly, the same steps are required if, for example, the virtual machine was reset.



Following the successful activation of Docusnap proceed with the configuration.

Configuration Wizard

Following the successful activation of Docusnap proceed by selecting whether the configuration for the *Docusnap server* and the installation of the *Docusnap Web Client* is started in addition to the *Docusnap client* configuration. The Docusnap Web Client requires the configuration of the Docusnap server.

If *Install Sample Database* is selected a database which already contains sample data is created. If the sample database is not selected, an empty Docusnap database is created. For the database the name *Docusnap* is used. For the sample data Docusnap always creates a new database.

Here you can choose between the Docusnap Quickstart and start the configuration wizard. In the Docusnap Quickstart, the default settings are used for paths etc. and Docusnap starts immediately. If the creation of the local database is performed during the installation of Docusnap, it is used automatically for the Quickstart. If not, a dialog for choosing between the local database and SQL Server opens.

Configuration

1 Activation 2 Start Options

Installation & Configuration

- ☒ Configure Docusnap Client
- ☒ Configure Docusnap Server
- ☒ Install Docusnap Web

i Docusnap Server, Web Client and Discovery Service can't be used with LocalDB. For these features an SQL Server must be selected.

Start Options

- ☐ Install Sample Database
- ☐ Docusnap Quickstart (Only the Docusnap Client is configured)

Next Cancel

In the next step, the database for storing the data will be set. Both Microsoft SQL Server databases and local databases are supported. For reasons of performance and compatibility, we recommend the use of Microsoft SQL Server.

▪ Microsoft SQL Server

Compatibility: SQL Server 2008 or later versions.

In addition to the Microsoft Server retail products (Standard & Enterprise), the Express versions of SQL Server are also supported.

When using SQL Server in the network, make sure that the server has been configured for remote access via TCP/IP and that the permissions for Windows or SQL authentication have been set properly.

▪ Local Database (Microsoft Server Express LocalDB)

If the local database does not already exist on the system, it can be created as part of the Docusnap installation.

Configuration

1 Activation 2 Start Options 3 **Database** 4 Settings 5 Steps 5-10

Microsoft SQL Server Database

☐ Use Local Database Authentication: SQL Server-Authentication

SQL Server: 172.31.3.131\SQLEXPRESS User Name: docusnap

Database: DocusnapDemo Password: *****

Metaschema updated successfully

Settings

Query Timeout in Seconds: 60

Database opened successfully

Back Next Cancel

The paths for the documentation, the *team settings*, the *local settings* and the storage location of attachments can be defined on the *Settings* page.

Base Path: A base path can be selected, in which the respective folders are created and in which then the data is stored. Through the *Adjust settings individually* checkbox, the paths can also be change individually.

- **Documentation:** All of the documents (data sheets, map files, overviews) will be stored in this directory, according to the structure of Docusnap. When creating the documentation, you have the option to select a different path.
- **Check-out path:** When defining [Extensions](#) it is possible to add attachments. These attachments are normally stored in the database. For editing purposes, such attachments will be temporarily stored in the specified directory.
- **Settings:** The Settings page includes *Local Settings* and *Team Settings*. In order to make user-specific data available to multiple users, a shared path must be specified in the *Team Settings* field. If the path entered under *Team Settings* is not available, the path from the *Local Settings* field will be used instead.

The screenshot shows a 'Configuration' window with a progress bar at the top. The progress bar has five steps: 'Steps 1-2', 'Database', 'Settings' (which is the current step and highlighted with a grey circle), 'Encryption', and 'Steps 6-10'. Below the progress bar, there are four sections: 'Base Path', 'Documentation', 'Attachments', and 'Settings'. Each section has a text input field with a file explorer icon and a help icon. The 'Base Path' field contains 'C:\Docusnap'. Below it is a checkbox labeled 'Adjust settings individually'. The 'Documentation' section has a field for 'Documentation Path' containing 'C:\Docusnap\Documentation'. The 'Attachments' section has a field for 'Check-out Path' containing 'C:\Docusnap\CheckOut'. The 'Settings' section has two fields: 'Local Settings' containing 'C:\Docusnap\LocalSettings' and 'Team Settings' which is empty. At the bottom right, there are three buttons: 'Back', 'Next' (which is highlighted with a dashed border), and 'Cancel'.

Configuration

Steps 1-2 Database **Settings** Encryption Steps 6-10

Base Path

Base Path: C:\Docusnap

☐ Adjust settings individually

Documentation

Documentation Path: C:\Docusnap\Documentation

Attachments

Check-out Path: C:\Docusnap\CheckOut

Settings

Local Settings: C:\Docusnap\LocalSettings

Team Settings:

Back Next Cancel

You need to create an encryption file to enable the *Passwords* module in the main window. Encryption ensures that the passwords will be stored in the database in encrypted form. These passwords can only be read by users who use the same encryption file. If you do not create an encryption file, the *Passwords* module will remain hidden.

The encryption file should be treated with great care, since it is not possible to replace or re-create this file should it be lost.

The screenshot shows the 'Configuration' window of the Docusnap startup wizard. At the top, a progress bar indicates five steps: 'Steps 1-3', 'Settings', 'Encryption' (the current step, highlighted with a grey circle and the number 5), 'Server Start Settings', and 'Steps 7-10'. Below the progress bar, the 'Encryption File' section contains the following text: 'The **Password Module** can be used to enter and manage credentials in **Docusnap**. To enable the module, an encryption file needs to be created. The passwords are saved in **encrypted form** in the database and only users with the **same encryption file** can read them. If no encryption file was created, the password module is hidden. Make sure to handle the encryption file carefully because, **there is no possibility to replace or restore a lost encryption file.**' Below this text are three radio buttons: 'Create New File' (selected), 'Select Existing File', and 'Disable Encryption'. Under the 'Select Existing File' option, there is a section titled 'Select Encryption File' with a text input field containing 'C:\Docusnap\DocusnapCrypt.dcr' and a file selection icon. At the bottom right, there are three buttons: 'Back', 'Next' (highlighted with a dashed border), and 'Cancel'.

The Startup wizard also allows you to configure Docusnap Server. Enable the *Configure Docusnap Server* checkbox to display the steps for the Docusnap Server configuration.

The *Startup Type* in the step *Server Start Settings* determines whether the Docusnap server is started automatically or manually.

In addition, the debug mode for the Docusnap server can be turned on.

By default, the service is run with the local system account. To ensure the connection to the database, it is recommended to use a SQL authentication in the step *Server Database*.

The screenshot shows the 'Server Configuration' window with a progress bar at the top. The steps are: Steps 1-4, Encryption, **6 Server Start Settings**, Server Database, and Steps 8-10. The 'Configure Docusnap Server' section is active, showing 'Startup Type' set to 'Automatic' and 'Language' set to 'English'. There are input fields for 'User' and 'Password'. A checkbox for 'Execute Inventory in Own Process' is present. A 'Remark' section provides information about using the local system account and permissions. The 'Debugging' section has a checkbox for 'Enable Debug Mode' and a 'Debug Level' dropdown set to 'Log everything', with a 'Reset Log' button. At the bottom are 'Back', 'Next', and 'Cancel' buttons.

Server Configuration

Steps 1-4 Encryption **6 Server Start Settings** Server Database Steps 8-10

☒ **Configure Docusnap Server:**

Startup Type: Language:

User: Password:

☐ Execute Inventory in Own Process

Remark: If no user and password is entered, Docusnap Server uses the local system account. If the system account doesn't have permissions for the database, Docusnap Server exits with an error. For the network paths (team settings, documentation path ...) the necessary permissions for the account **MachineName\$** must be granted.

Debugging

☐ Enable Debug Mode

Debug Level:

The Docusnap database is the key element for the completion of jobs. It holds the jobs to be processed by the Docusnap Server.

The screenshot shows the 'Server Configuration' window with a progress bar. The steps are: Steps 1-5, Server Start Settings, **7 Server Database**, Server Settings, and Steps 9-10. The 'Microsoft SQL Server Database' section is active, showing 'Authentication' set to 'SQL Server-Authentication'. There are input fields for 'SQL Server' (VPC-SGR\SQLEXPRESS), 'User Name' (sa), 'Database' (Docusnap), and 'Password' (masked with asterisks). A green progress bar indicates 'Metaschema updated successfully'. There are 'Connect' and 'Create' buttons. The 'Settings' section has a 'Query Timeout in Seconds' spinner set to 60. The 'Encryption Module' section has radio buttons for 'Disabled', 'Select Existing File' (selected), and 'Create New File'. There is an 'Encryption File' input field with a file explorer icon. At the bottom, a yellow status bar says 'Database opened successfully'. 'Back', 'Next', and 'Cancel' buttons are at the bottom right.

Server Configuration

Steps 1-5 Server Start Settings **7 Server Database** Server Settings Steps 9-10

Microsoft SQL Server Database

Authentication:

SQL Server: User Name:

Database: Password:

Metaschema updated successfully

Settings


Query Timeout in Seconds:

Encryption Module

Encryption: ☐ Disabled ☒ Select Existing File ☐ Create New File

Encryption File:

☒ Database opened successfully

Use the *Documentation Path* field to define the location where the documents (overviews and datasheets) will be stored by the Docusnap Server. Click the  button to select the folder for storing the documents to be output.

When creating the documentation, Docusnap uses the system account permissions for executing the service. For this reason, make sure that the system account has a write permission to the selected documentation path. Alternatively, you can specify a user or service account with sufficient permissions for the *Docusnap Server* Windows service.

The files and templates used by Docusnap may either be stored on the local hard disk, on a server, or on a different computer in the network. Docusnap will use the path selected for the *Team Settings*, if any. If no path was selected for the *Team Settings* or if that path no longer exists, the path defined for the *Local Settings* will be used.

The [IT concepts](#) you create are saved under Documentation path.



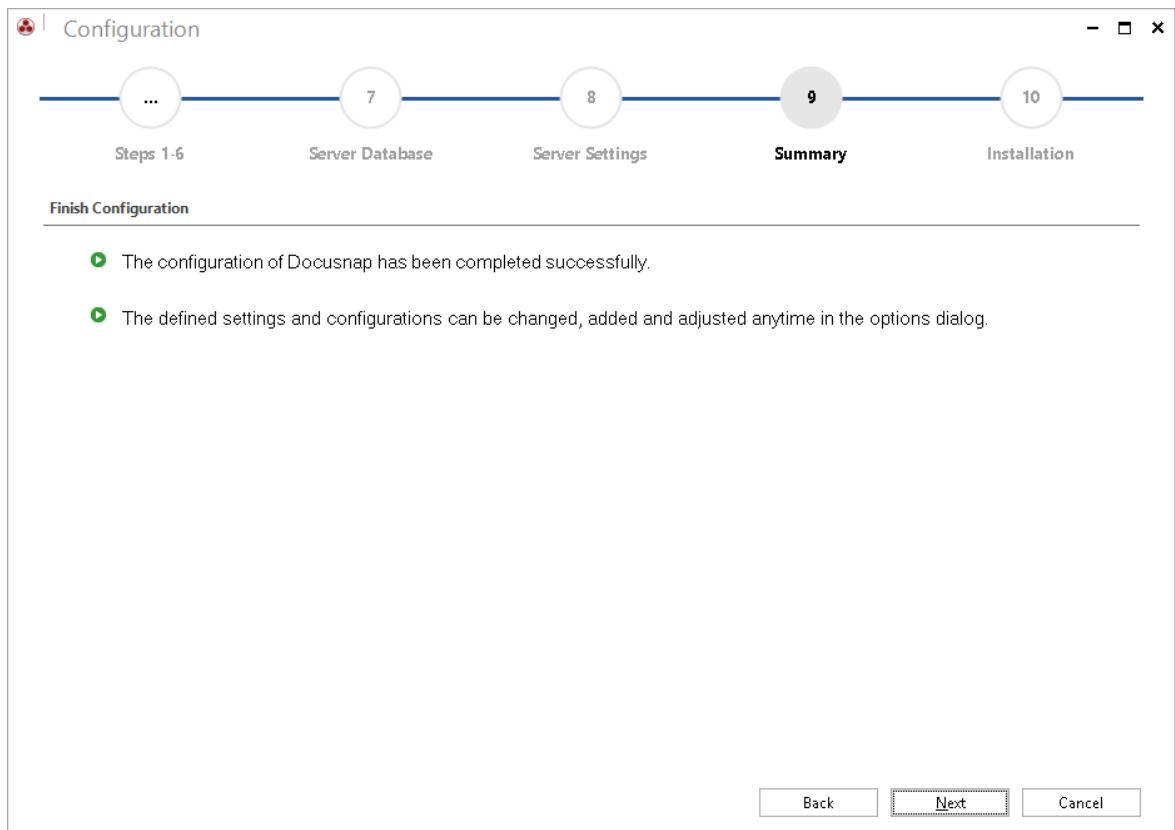
The *Docusnap Server* only supports UNC addresses for the path specifications to be used.

When creating the documentation, Docusnap relies on templates. During the configuration, Docusnap loads these templates into the local or team settings directory. If both paths are not available at the time when the job is processed, Docusnap will use the templates from the program directory.

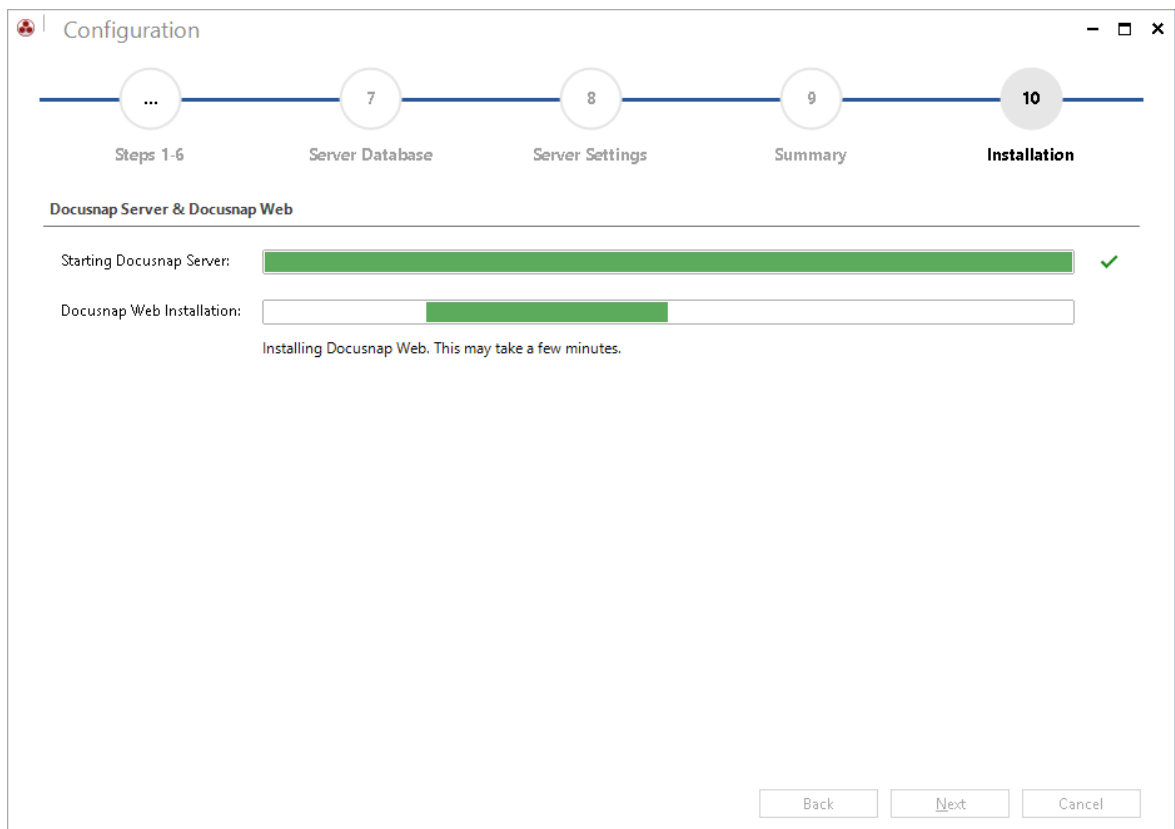
The screenshot shows the 'Server Configuration' window with a progress bar at the top. The progress bar has five steps: 'Steps 1-6', 'Server Database', 'Server Settings' (current step, highlighted with a grey circle), 'Summary', and 'Installation'. Below the progress bar, the 'Documentation' section has a 'Documentation Path' field with the value 'C:\Docusnap\Documentation'. The 'Settings' section has two fields: 'Team Settings' (empty) and 'Local Settings' (value 'C:\Docusnap\LocalSettings'). At the bottom, there is a yellow warning box with a triangle icon and the text 'The path for the Team Settings will be set for client and server'. To the right of the warning box are three buttons: 'Back', 'Next' (highlighted with a dashed border), and 'Cancel'.

When all settings have been defined, the configuration of the Docusnap client and the Docusnap server is complete. Once you have completed the configuration, Docusnap X will start automatically.

If the Docusnap Web installation was activated at the *Start Options* step, the installation is started by clicking the *Next* button.

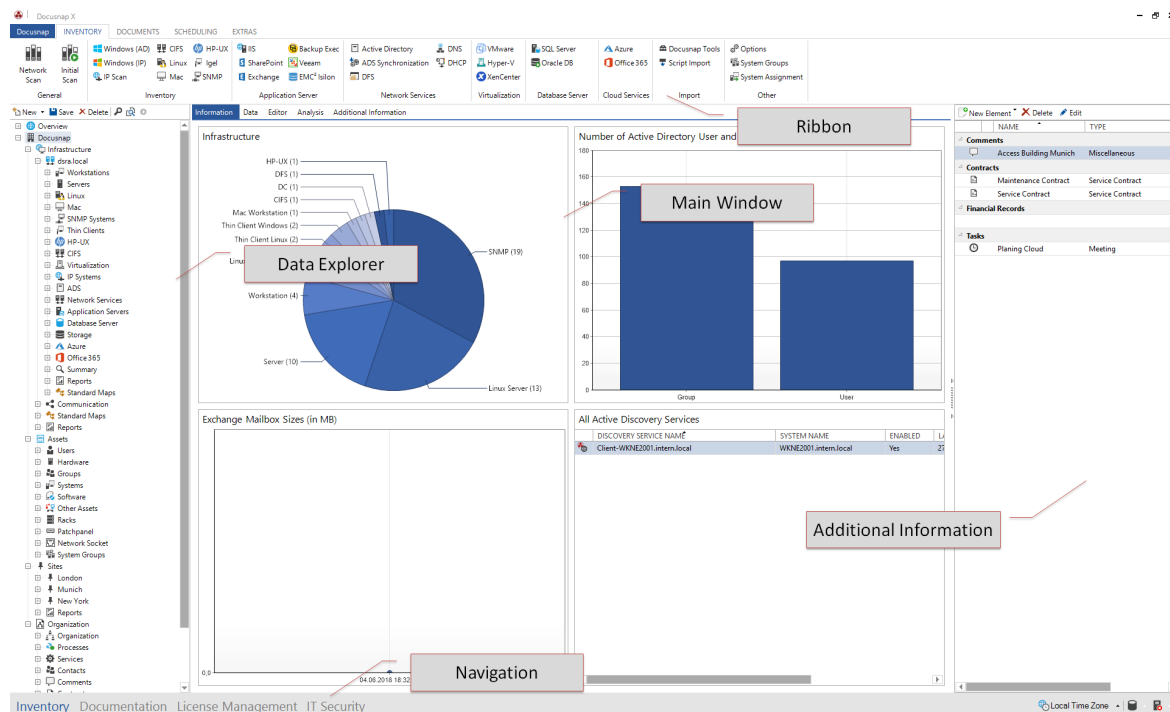


After the Docusnap server is started and the Docusnap Web Client has been installed, Docusnap is started.



2.6 User Interface

The user interface for Docusnap is subdivided into the ribbon, the Data Explorer and the main window.



Ribbon

Docusnap wizards, dialogs and features will generally be accessed from the ribbon. The ribbon is subdivided into several tabs according to functionality.

Data Explorer

In the Data Explorer, information is hierarchically displayed as a tree view. There are seven different tree views. The various tree views can be opened as needed from the navigation pane.

Main Window

In the main window, information is displayed in various views.

The main window displays data for the objects selected in the Data Explorer. Additional information can be specified using data entry screens in the editor. Additional information in the form of comments, financial records, passwords, contracts and tasks can be added. The reports will be executed on their own tab. The permissions for the folder structure will be analyzed using the Permission Analysis process.

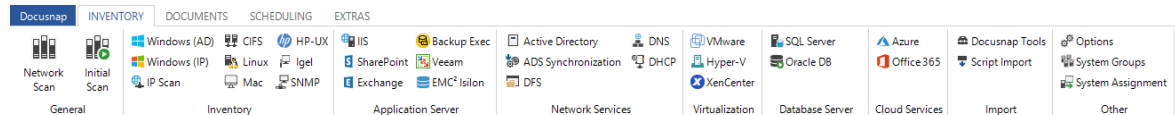
Navigation

In the navigation you can switch between the different explorers. By activating the [Display of Time Zones](#), the output of the scan date can be adjusted in the data

explorer. In the status bar of Docusnap it can be selected which time zone is used for the display.

2.6.1 Menu Ribbon

Most Docusnap wizards, dialogs and features will be accessed from the ribbon. The ribbon is subdivided into several tabs according to functionality.



Inventory

Documents

Scheduling

Extras

Licenses

IT Security

Diagrams

Concepts

Organization

Reporting

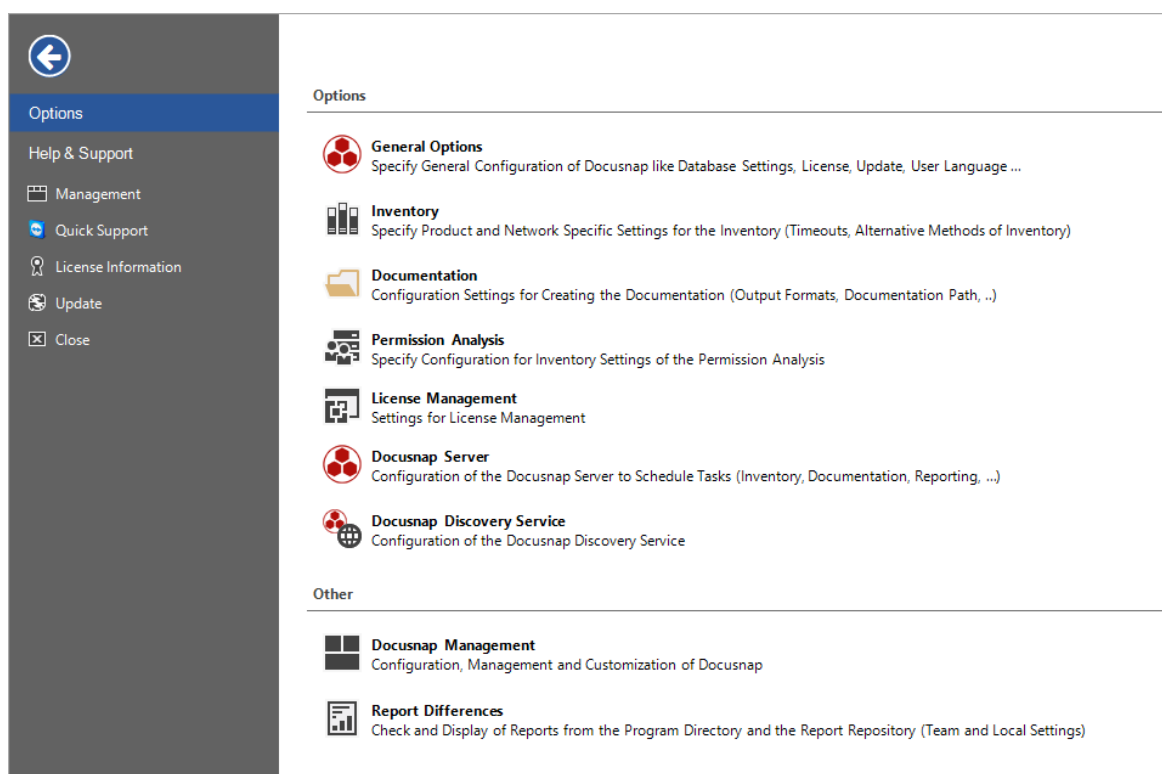
2.6.1.1 Docusnap Menu

Options

- **General Options:** Click the *General Options* button to open the *Options* dialog. In this dialog settings for the program can be determined. The choice of database and settings for update and Docusnap license are in this dialogue. In the Options dialog, the language of the program is selected. Docusnap offers the choice between German and English. Select the desired language in the combo box. To change the language, the program must be restarted.
- **Inventory:** Settings for the execution of the wizard for the inventory can be made in this dialog.
- **Documentation:** In the configuration of the documentation the path for storing the documents is set and it is determined which settings are used to create the documents.



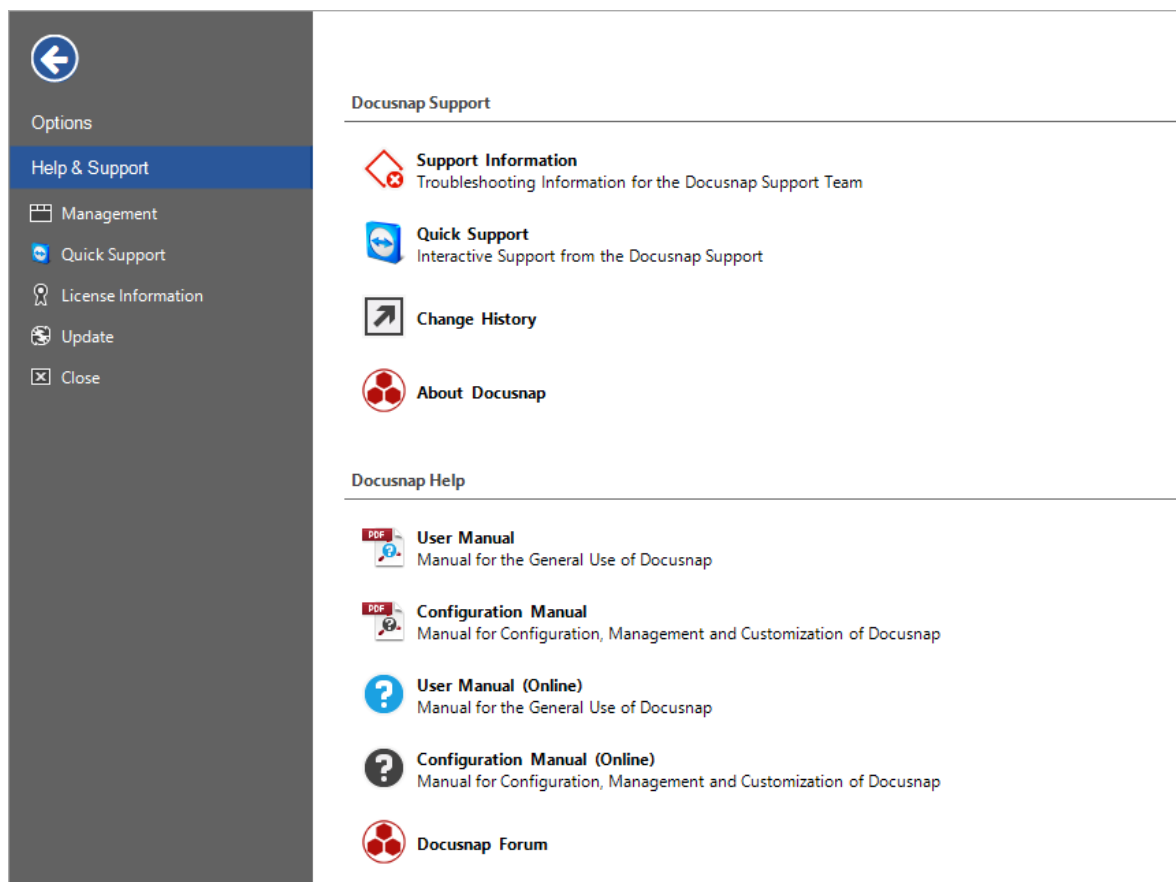
- [Permission Analysis](#): The option *Limit Folder Levels* in the *Options - Permission Analysis* dialog allows you to specify the number of folder levels to be scanned. This can, for example, be helpful if at a certain level the permissions are only inherited.
- [License Management](#): The options *Include Mac Software Products*, *Include Linux Software Products* and *Include Unknown Software Products* in the *Options - License Management* dialog define if software products of a particular operating system should be excluded from the license management.
- [Docusnap Server](#): Click the *Docusnap Server* button to start the wizard for configuring the Docusnap Server.
- [Docusnap Discovery Service](#): Click the *Docusnap Discovery Service* button to open the dialog for configuring Discovery Services.
- **Docusnap Management**: Click the *Docusnap Management* button to open the *Docusnap Management*.
- **Report Differences**: This dialog displays for which reports a customized version has been created and which is used.



Help & Support

- **Support Information**: By clicking the *Support Information* button, you open a dialog that allows you to create and send information for troubleshooting.

- **Quick Support:** Support in the form of remote maintenance is an option for problems and questions. Clicking the *Quick Support* button, starts the "TeamViewer" client. It displays an ID and a password that you must tell to our support staff so that the support team member can connect to your computer. After the connection with the support team member has been established, control of the screen can be transferred.
- **Change History:** Click the *Change History* button to open a dialog that shows the change log, i.e. the changes and enhancements introduced with the last versions of Docusnap.
- **About Docusnap:** A click on the *About Docusnap* button displays a window with information about the program. For example, the current version number will be displayed.
- **User Manual:** Click this button to display a menu that allows you to open the User Manual as PDF files or access the online version.
- **Configuration Manual:** Click this button to display a menu that allows you to open the Configuration Manual as PDF files or access the online version.
- **Docusnap Forum:** Via this button Docusnap Forum can be opened.



Buttons

- **Management:** Click the *Docusnap Management* button to open the *Docusnap Management*.
- **Quick Support:** Click the *Quick Support* button to start the "Team Viewer" Client.
- **License Information:** Click the *License Information* button to open a dialog with basic information about the license.
- **Update:** Click the *Update* button to start the program update. More information about this can be found in the [Update](#) chapter.
- **Close:** Click the *Close* button to close Docusnap.

2.6.1.2 Inventory

The wizards for starting the inventory process can be accessed from the *Inventory* ribbon. Learn how to use the wizards for the inventory process by reading the [Inventory](#) chapter.

Inventory

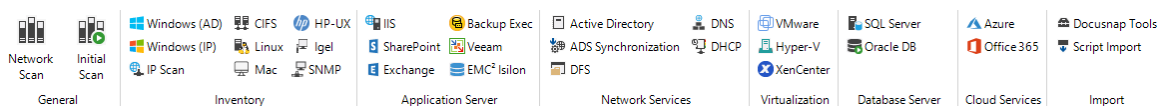
To launch the Inventory wizard, click the *Network Scan* button.

The *Initial Scan* collects basic information about the network such as Active Directory, Windows Systems, DHCP, DNS, Exchange, and SNMP using a wizard.

Depending on the type of system you want to scan, click the associated button.

In addition, you can use the *Script Import* button to import script files. The button *Docusnap Tools* opens the folder which contains the executable file for creating the script files. More information about Docusnap scripts can be found in the [Scripts](#) chapter.

When you click the *ADS Synchronization* button, the scanned systems are compared with the systems known to the Active Directory system. Then, the computers that are no longer found in the Active Directory system, but still exist in Docusnap, will be displayed. From that dialog, you can determine whether these computers should be deleted from the Docusnap database as well. The Active Directory system will not be modified by Docusnap.

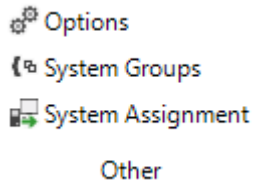


Other

Settings for the number of archived versions and the execution of the wizard for the inventory can be made in the *Options* dialog.

In the *System Groups* dialog systems that have been scanned can be assigned to system groups to define logical groupings. For each group, specific maps can be generated.

In the System Assignment dialog, systems can be assigned to the sites.



2.6.1.3 Documents

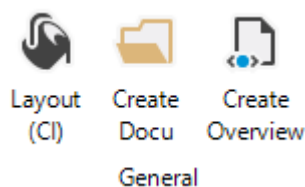
Using this ribbon, you can create the required documentation. Documents you can create include, for example, Visio maps, Excel overviews or Word-based datasheets. Learn how to use the wizard for creating the documents by reading the [Documentation](#) chapter.

General

Layout (CI): Clicking this button opens a dialog where you can customize the design of reports, Visio maps, and IT concepts. These settings can be modified individually for each company. This particularly affects the design of the documents to be created and the company logo.

Click the *Create Docu* button to launch the wizard which contains the options for creating the various documents. Multiple documents can be created simultaneously using this wizard.

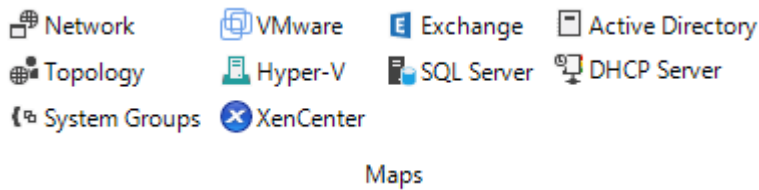
The *Create Overview* button in the ribbon can be used to create a document that references the previously created documents.



Maps

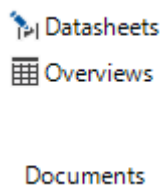
The following Visio map files can be created.

Different systems located in one domain can be combined into [System Groups](#). Corresponding datasheets and network maps, as well as routing maps, can be created for these system groups.



Documents

Use the buttons in the *Documents* group to create datasheets for all Systems and overviews. To generate Excel overviews of the Active Directory system, the Windows computers, and the software, click the *Overviews* button.

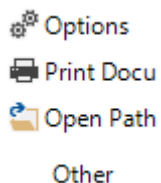


Other

Settings for the documentation path, fonts, and other default settings for the document creation can be made in the [Options - Documentation](#) dialog.

By clicking the *Print Docu* button, you can open the [Print Documentation](#) wizard.

Clicking the *Open Path* button takes you to the path where the created documents are saved. You can specify this from the *Options - Documentation* dialog.

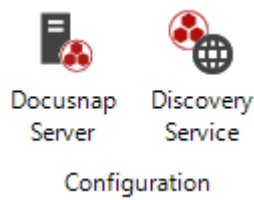


2.6.1.4 Scheduling

In the ribbon *Scheduling* settings for Docusnap Server and Docusnap Connect are specified. This ribbon is subdivided into three groups.

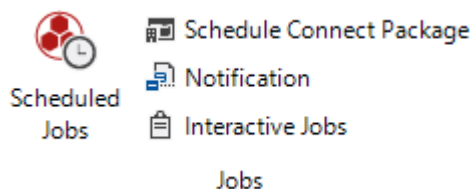
Configuration

- [Docusnap Server](#): Click the *Docusnap Server* button to launch the Docusnap Server configuration wizard.
- [Docusnap Discovery Service](#): The *Docusnap Discovery Service* button opens the Discovery Services configuration dialog.



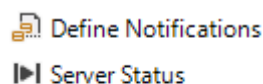
Jobs

- [Scheduled Jobs](#): Clicking the *Scheduled Jobs* button opens a dialog where you can manage jobs scheduled in Docusnap.
- [Schedule Connct Package](#): Click the *Schedule Connct Package* button to open the *Docusnap Connect* wizard. This wizard can be used to schedule a timed export of data.
- [Notification](#): Notifications are used to send e-mail messages automatically if certain conditions or criteria are met. This feature can be used, for example, to notify the user about the expiration of a contract.
- **Interactive Jobs**: Clicking on the *Interactive Jobs* button lists all interactively executed inventories of the current system, the Docusnap Server and the Discovery Services, which are connected to the same database. If the user management is active, only inventories of companies to which the logged in user is authorized are listed.



Other

- [Define Notification](#): With this feature, you can have Docusnap automatically send an e-Mail when a license becomes invalid or an agreement expires on that day. Corresponding queries can be defined in the *Define Notifications* dialog.
- **Server Status**: In the Server Status dialog the current database of the Docusnap server and the status of the server is specified. The server may also be started or stopped.



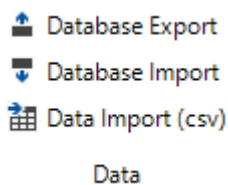
Other



2.6.1.5 Data

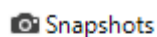
General

- [Database Import](#): Data from another Docusnap database can be imported by clicking the *Database Import* button.
- [Database Export](#): Using the *Database Export* button, you can export a database.
- [Data Import \(csv\)](#): Click the *Data Import (csv)* button to launch the wizard for importing data from a CSV file.



Other

By clicking the *Snapshots* button, you open the dialog for managing snapshots. There, you can name the snapshots that have been created so far. In addition, they can be deleted or flagged as undeletable.



Other

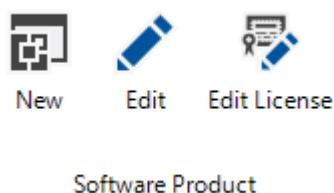
2.6.1.6 Licenses

The *License Management* ribbon displays after the License Management option has been selected in the Navigation pane.

Licenses

Clicking the *New* button will start the [License Management Wizard](#). The desired license can be created using this wizard.

The data can be edited using the wizard. Clicking the *Edit* button will open the *License Management* wizard with the data for the selected software product, which may then be edited.



Software Product

Click the *Assignment* button to open the *Software Product Licensing* dialog. In this dialog all inventoried software products are listed and can be assigned to product licensing.





Assignment

Software List

Definition

The settings for software groups, software products, search keywords and licenses can be exported and imported into other databases. This means that a software product must only be defined once and can then be re-used with other Docusnap databases.

 Export


 Import


Definition

Other

The setting of which software products are suggested in the license management, can be determined in the *Options - License Management* dialog.

If you want to exclude software pertaining to certain systems, e.g. software used in a test environment, the corresponding systems may be excluded from license management. To exclude such systems, either click the *Exclude Systems* button or use the editor in the [Data Explorer](#) hierarchy of the specific system.

 Options

 Exclude Systems

Other

2.6.1.7 IT Security

The *IT Security* ribbon will be displayed when Permission Analysis has been selected from the Navigation pane.

Inventory

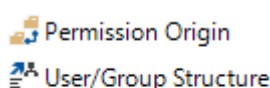


- [NTFS Analysis](#): Click the NTFS analysis button to open the wizard to select the Windows systems whose permissions are to be inventoried.
- [Online Analysis](#): The permissions will be determined at runtime by the Online Analysis process and thus not stored in the database. The Online Analysis process will be active once you click the *Online Analysis* button.



Analysis

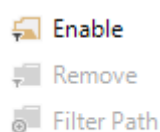
- **Permission Origin**: Click the *Permission Origin* button to open the [permission structure](#) for the currently selected user.
- **User/Group Structure**: Click the *User/Group Structure* button to display the [group or user nestings](#) diagram.



Analysis

Filter

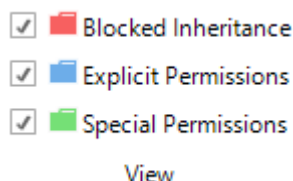
- **Enable/Remove**: The Data Explorer displays all directories of a scanned system. To display the filter below the permissions list, click the *Enable* button in the *Filter* group of the ribbon. Once you have defined the desired filter criteria (Write, Read, etc.), only those directories will be displayed in the Data Explorer that match the selected user or group filter.
- **Filter Path**: The *Filter Path* dialog only opens for the analysis of SharePoint permissions. Since the SharePoint permission structure is different from the structure of NTFS permissions, this dialog is used to select the desired starting point for the analysis. According to the filter you set, only the directories below the starting node that correspond to the selected users/groups will be displayed.



Filter

View

- **Blocked Inheritance:** Inheritance can be blocked for directories. This means that the permissions will not be inherited. If the *Blocked Inheritance* checkbox is enabled, the directories for which inheritance is blocked will be displayed with a red icon in the *Permission Analysis* explorer.
- **Explicit Permissions:** Permissions can be assigned directly to directories. If the *Explicit Permissions* checkbox is enabled, all directories to which permissions have been assigned explicitly will be displayed with a blue icon.
- **Special Permissions:** If this checkbox is enabled, special permissions will be displayed in addition to the basic permissions.



NTFS Reports / SharePoint Reports / Exchange Reports

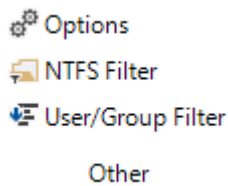
- When you click the *Current View* button, the permissions displayed on the Permission Analysis tab will be output in a report.
- By clicking the *User Report* button, you can create a report which shows the effective permissions to the selected directory and its subdirectories or for Exchange permissions to the mailboxes, mailbox folders, and public folders.
- Clicking the *Directory Report* button creates a report which displays all users who have a permission to the selected directory and its subdirectories.
- Clicking the *Overview Report* button creates a report which displays all users who have permissions to the mailboxes, mailbox folders, and public folders.
- **Report Jobs (csv):** By importing a CSV file multiple jobs to generate Directory Reports for NTFS can be created simultaneously.



Other

- The setting, if the number of inventoried levels for the NTFS analysis should be limited, is set in the *Options - Permission Analysis* dialog.
- Clicking the *NTFS Filter* option opens the *Manage NTFS Filter* dialog. In this dialog, you can specify directories to be excluded from the NTFS analysis. For an explanation of this dialog, refer to the [NTFS Filter](#) section.

- You can use the [User/Group Filter](#) to exclude selected users and groups from the directory reports.



2.6.1.8 Diagrams

The *Diagrams* ribbon is displayed when you select the headline *Diagrams* in the *Documentation* tree. Using this ribbon, you can save and edit diagrams.

General

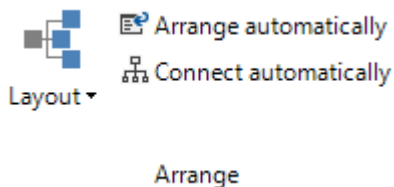
Click the *Export* button to export the current diagram into different file formats (vdx, png, html, svg). Clicking the *Reset* button will reload the last saved version of the diagram.



Arrange

The *Arrange* group on the ribbon is used to select the algorithm for the automatic arrangement of the objects.

If the *Connect automatically* button has been enabled, a new component will always be connected with the most recently selected component.

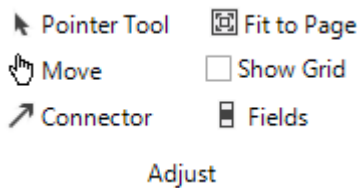


Adjust

- The *Pointer Tool* allows you to select individual components by a mouse click.
- Click the *Move* button to enable moving of the entire diagram.
- If the *Connector* tool has been selected, you can create a relation connector by clicking a component while holding down the mouse button. That component can

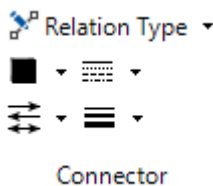
then be dragged to another component and, by doing so, the two components will be connected.

- Clicking the *Fit to Page* button adjusts the diagram to the page.
- Show Grid: In the background of the drawing sheet, a grid can be displayed that helps you align the components.
- Fields: Each relation has properties, such as a name, description, priority, etc. The fields to be displayed can be selected from the *Display Fields for Relations* dialog.



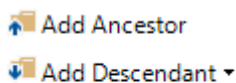
Connector

In the *Connector* group, you can select the connector type and design.



Analyse

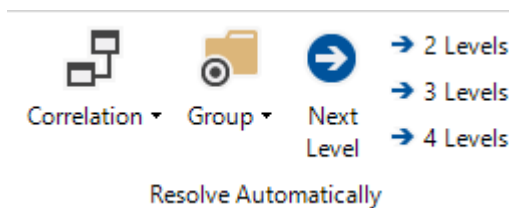
- Ancestor: Click the *Ancestor* button to add the parent node in the tree hierarchy for the selected object.
- Descendant: Click the *Descendant* button to display all descendants of the selected object and add the desired object.



Resolve Automatically

- Correlation: By clicking on the *Correlation* button all existing correlations for the selected object are displayed. Subsequently, the desired correlation is selected and all objects of the corresponding IT Correlation are added.
- Group: By clicking on the *Group* button all existing IT Correlations groups for the selected object are displayed. Subsequently, the desired group is selected and the group with all objects of the corresponding IT Correlation are added.

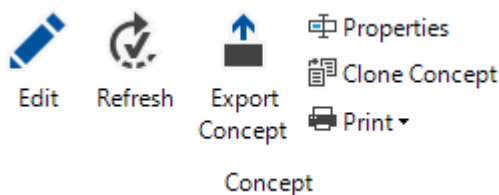
- **Levels:** Click on the buttons *Level* to select how many levels of IT Correlations should be resolved.



2.6.1.9 Concepts

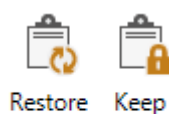
The *Concepts* ribbon displays when you have selected Concepts in the *Documentation* tree. Using this ribbon, you can edit and change concepts.

Concept



- **Edit:** A click on the *Edit* button launches the Concept Editor where you can edit the selected concept.
- **Refresh:** Use the *Refresh* button to update the concept. This reloads the data for data elements, reports, etc. and recreates the table of contents.
- **Export Concept:** Using the *Export Concept* button, you can export your concept to Word, PDF, or other formats.
- **Properties:** Click on the *Properties* button to open the *Concept Properties* Dialog. In this dialog the name of the concept and the author can be changed. In addition, the date of change and creation as well as the file size are displayed. A description of the concept can also be added.
- **Clone Concept:** Click on the button *Clone Concept* to copy the selected concept. The name can then be changed in the *Concept Properties* dialog.
- **Print:** By clicking the *Print* button, you can print the selected concept.

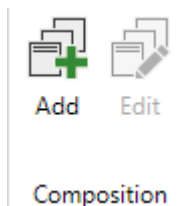
Versions/Backup



Versions/Backup

- **Restore:** Clicking the *Restore* button restores the selected version or the selected backup as a concept and can be edited. The previous concept remains as the last backup.
- **Keep:** Since only a certain number of versions and backups of a document can be stored, you can click this button to select and keep a certain version or backup. This prevents the current document version from deletion.

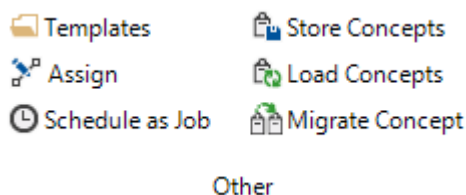
Composition



A composition is a document created from multiple concepts. If the concepts of the composition are changed, the composition document also changes. The export of compositions can be planned in a time-controlled manner like the export of the concepts.

- **Add:** If the node *Concepts* or a concept folder in the tree has been selected, the button *Add* can be used to open the *Manage IT Concept Composition* dialog.
- **Edit:** If a composition has been selected, the dialog to edit a composition can be opened via the *Edit* button.

Other



- **Templates:** Clicking the *Templates* button opens the *Concept Templates* dialog.
- **[Assign](#):** Clicking this button opens the *Assign Concept* dialog which allows you to insert the desired concept into other tree views. It is also possible to add a *concept folder* to a node in one of the other trees.
- **[Schedule as Job](#):** Clicking this button opens a wizard which allows you to schedule creation of a concept for a certain date and time.
- **Store Concepts / Load Concepts:** Concepts, versions, backups and templates can be saved as a file. These can then be imported into other companies or other databases.

- **Migrate Concept:** The concepts that are in the defined concept path are automatically moved to the database. If other IT concepts are saved in a different folder, they can be stored in the database via the *Migrate IT Concepts* dialog.

2.6.1.10 Organization

The *Organization* ribbon is displayed when the *Additional Information* tab is selected.

General

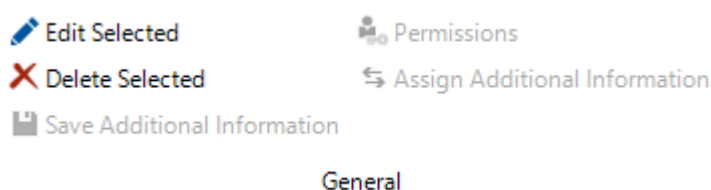
The *Edit Selected* and *Delete Selected* buttons are only enabled if an *Additional Information* has been selected in the data window. By clicking the *Edit Selected* button, you can open the selected *Additional Information* in the editing window.

By clicking the *Delete Selected* button, you can remove the selected *Additional Information*.

If an additional information is changed in the data entry screen, the changes must be saved using the *Save Additional Information* button.

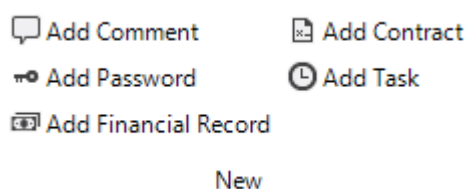
The *Permissions* button allows you to define which user roles have access to the created information.

In the *Assign Additional Information* dialog, existing additional information can be assigned to the currently selected object.



New

The *Organization* ribbon provides the ability to add new extensions. In the *New* group, you can add comments, passwords, financial records, contracts and tasks.



2.6.1.11 IT Documentation

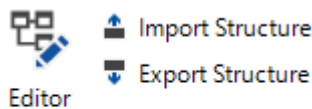
The ribbon *IT Documentation* is displayed when the headline *IT Documentation* or an underlying node is selected in the *Documentation* tree.

General

Editor: Clicking on the *Editor* button opens an additional window to create and edit the IT documentation.

Import Structure: By clicking the *Import Structure* button, created frameworks that have been previously exported to a file can be imported into a new database.

Export Structure: By clicking the *Export Structure* button, you can export the frameworks to a file, which can then be imported into another database.



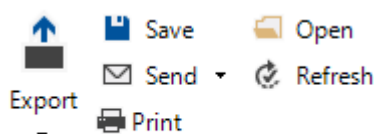
General

2.6.1.12 Reporting

The *Reporting* ribbon appears when a report is executed. Actions specific to reports may be executed from this ribbon. This ribbon consists of four groups.

General

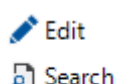
- **Export:** Reports may be exported to various file formats. The desired format can be selected by clicking the *Export* button. When you click the desired format, a dialog appears where you can select the pages to be exported. Click the *plus* sign to expand the settings dialog. Then, you can select format-specific settings. If the file should automatically be opened after the save, enable the *Open After Export* checkbox.
- **Save:** Click the *Save* button to save the executed report as an *.mdc* file.
- **Send:** Reports may be sent by email. As with Export, the desired file format can be selected by clicking the *Send* button. The page selection dialog will be opened after you have selected the desired file format. Once the report has been saved, the standard email program opens so that you can send the report. MAPI support is required.
- **Print:** The displayed report can be printed by clicking the *Print* button.
- **Open:** Saved reports can be opened by clicking the *Open* button. Only reports that have been saved as *.mdc* files may be opened in this manner.
- **Refresh:** By clicking on the *Refresh* button, the report is generated again. For reports with a preceding form the settings can be specified again.



General

Edit

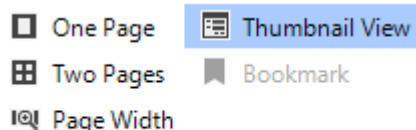
- **Page Size:** To open the dialog for the definition of the page size, click the *Page Size* button.
- **Edit:** To edit the displayed report, click the *Edit* button. Editable fields are indicated with red borders. You can specify in the report definition whether a field in the report is editable or not. In the predefined Docusnap reports, only the headings can be edited. The results of the reports are not editable. Once the report has been opened in the Designer, its properties may be edited to make certain report sections editable.
- **Search:** When you click the *Search* button, the search toolbar will appear on the status bar of the main window. This toolbar can be used to search the displayed report.



Edit

View

- **One Page, Two Pages:** These options determine whether one page will be displayed or two pages side by side.
- **Page Width:** When you click the *Page Width* button, the executed report will use the full width of the main window for display.
- **Thumbnail view:** Thumbnails of the report pages will be displayed to the right of the data window. You can display or hide the preview pages by clicking the *Thumbnail View* button.
- **Bookmarks:** You can define bookmarks for your report. If bookmarks have been defined for a report, you can display them by clicking the *Bookmarks* button. This button is disabled if no bookmarks exist.





View

Other

- **Report Designer:** The current report can be opened in the Report Designer. To do so, click the *Report Designer* button.

- **Schedule as Job:** Click the *Schedule as Job* button to open the *Report Automation* wizard. The execution of a report can be scheduled for a later time using this wizard.

 Report Designer

 Schedule as Job

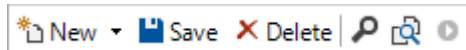
Other


2.6.2 Data Explorer


The data resulting from the inventory scan as well as manually entered information is displayed in the Data Explorer. This tree view reflects the structure of the network and presents the data transparently.

The tree nodes (objects) may represent captions, data or reports. Captions aid with the organization of the displayed information. When you select a data object in the tree view, the associated information will be displayed in the main window. When you select a report in the tree view, it will be generated and displayed in the main window.

In addition, you can use the *New*, *Save*, and *Delete* buttons above the tree structure to create, save, and delete a company.



By clicking the  button above the Data Explorer tree structure, you can start a [Full-text Search](#).

Once a node has been selected in the Data Explorer, you can click the  button to start a [Data comparison](#).

In the Navigation pane, you can select one of the four available categories (Inventory, Documentation, License Management, IT Security) for display. Depending on the category selected in the Navigation pane, the ribbon and the contents of the main window will be adjusted accordingly.

Inventory Documents Licenses Permissions Relations Concepts Organization

[Inventory](#)

[Documents](#)

[Licenses](#)

[Permissions](#)



2.6.2.1 Inventory

The *Inventory* tree displays data resulting from a [network inventory scan](#) and any information that have been added manually.

The top level represents the company. If you want to add a new company, click the *New* button above the Data Explorer. A new company can only be created if either an existing company is selected in the tree view or if no object is selected at all. When you click the *New* button, the [data entry screen](#) for creating a new company appears. Once you have entered all required information, click the *Save* button above the Data Explorer to save it.

The screenshot shows the Docusnap X Inventory application. The left sidebar contains a tree view with categories like Overview, Infrastructure, Servers, Linux, Mac, SNMP Systems, Thin Clients, HP-UX, CIFS, Virtualization, IP Systems, ADS, Network Services, Application Servers, Database Server, Storage, Azure, Office 365, Summary, Reports, Standard Maps, Communication, Assets, Sites, and Organization. The main area displays a table of inventory data for 'Data (11)'.

NAME	ONLINE	DOMAIN/WORKGROUP MEMBERSHIP	DOMAIN
DSBK01	Succeeded	DSRA.LOCAL	dsra.local
DSBK02	Succeeded	DSRA.LOCAL	dsra.local
DSDC01	Succeeded	DSRA.LOCAL	dsra.local
DSEX01	Succeeded	DSRA.LOCAL	dsra.local
DSFS01	Succeeded	DSRA.LOCAL	dsra.local
DSFS02	Succeeded	DSRA.LOCAL	dsra.local
DSFS03	Succeeded	DSRA.LOCAL	dsra.local
DSFS04	Succeeded	DSRA.LOCAL	dsra.local
DSSP01	Succeeded	DSRA.LOCAL	dsra.local
DSSP02	Succeeded	DSRA.LOCAL	dsra.local
DSSP03	Succeeded	DSRA.LOCAL	dsra.local

The right-hand panel has tabs for 'Comments', 'Contracts', 'Financial Records', and 'Tasks'. The 'Comments' tab is currently active, showing a table with columns for NAME and TYPE.

Below the *Infrastructure* headline, all domains are displayed with their respective inventoried systems. Reports and plans can also be generated.

IT assets, manual devices and other components of the infrastructure are created under the headline *Assets*.

Systems and IT assets can be assigned to sites. The sites are listed below the headline *Sites*.

The processes, services and organizational elements required for the IT documentation can be created under the headline *Organization*. *Additional information* is also listed centrally under this node

2.6.2.2 Documentation

IT Documentation

Business structures can be mapped in the IT documentation.

Documents

When you navigate to Documents in the Navigation pane, the Explorer shows any documents created in this module. Maps and datasheets are displayed in a hierarchical structure. If no map or datasheet has been created yet for the selected node, the main window shows the wizard that will help you to do so.

Concept

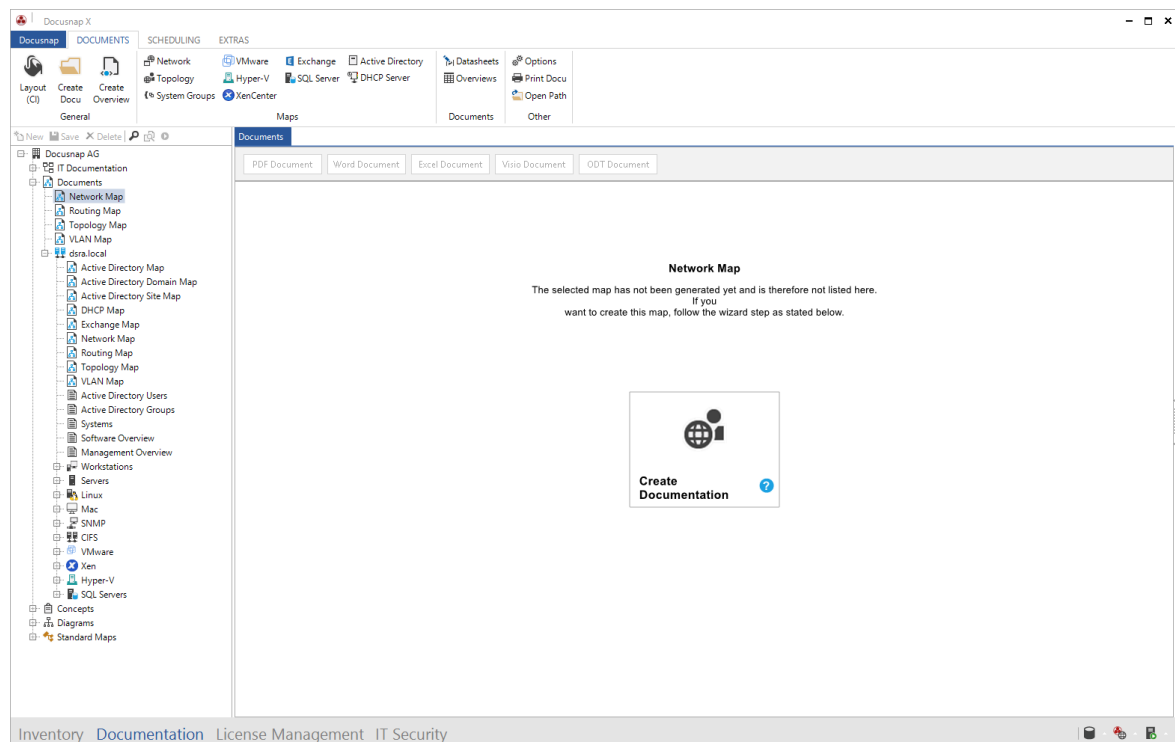
Below the *Concept* heading the available concepts are displayed. To create a new document or directory, click the *New* button above the tree view.

Diagrams

Diagrams are created below the *Diagrams* heading in the *Documentation* tree. Click the *New* button to create a directory for the diagram and then the diagram itself. You can then navigate to the *Diagrams* tab to create the desired diagram.

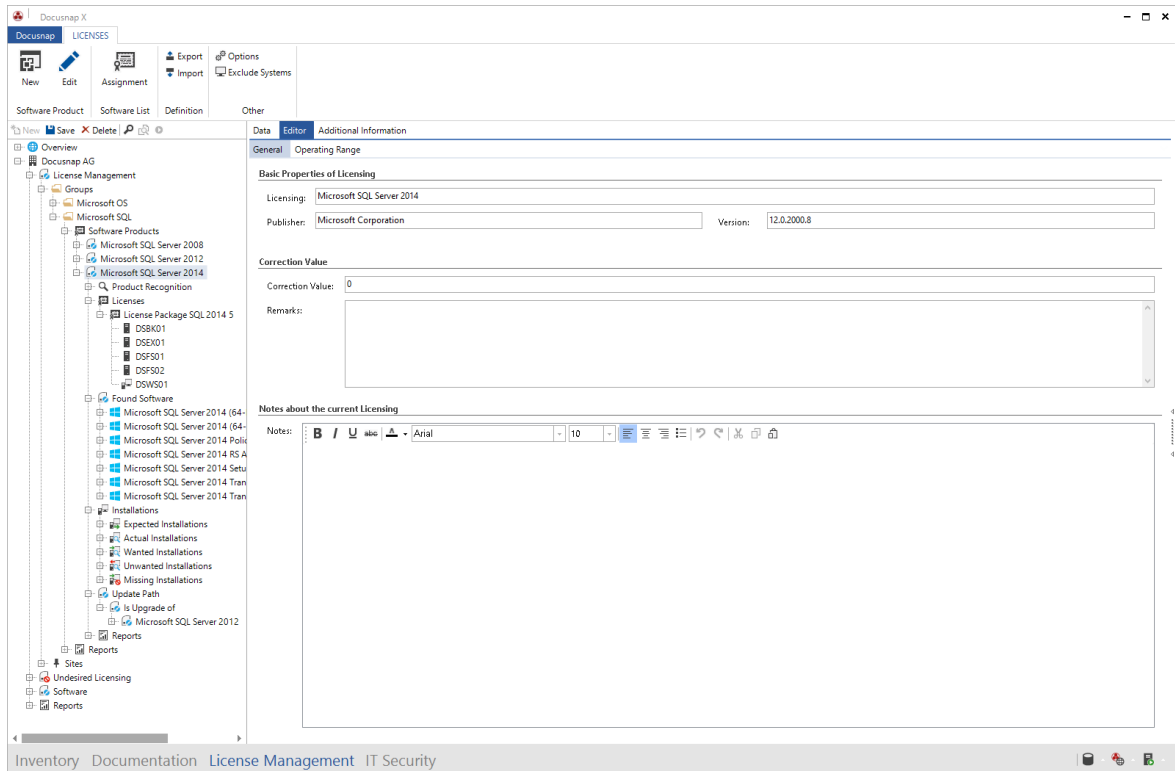
Standard Maps

Below the *Standard Map* heading the network map, the routing map, the topology map and the VLAN map can be created. These maps are always created anew and therefore they contain the latest data.



2.6.2.3 Licenses

In the *Licenses* explorer, any defined licenses will be displayed. In the Docusnap License Management module, you can analyze and document the licenses for software products purchased by your company.

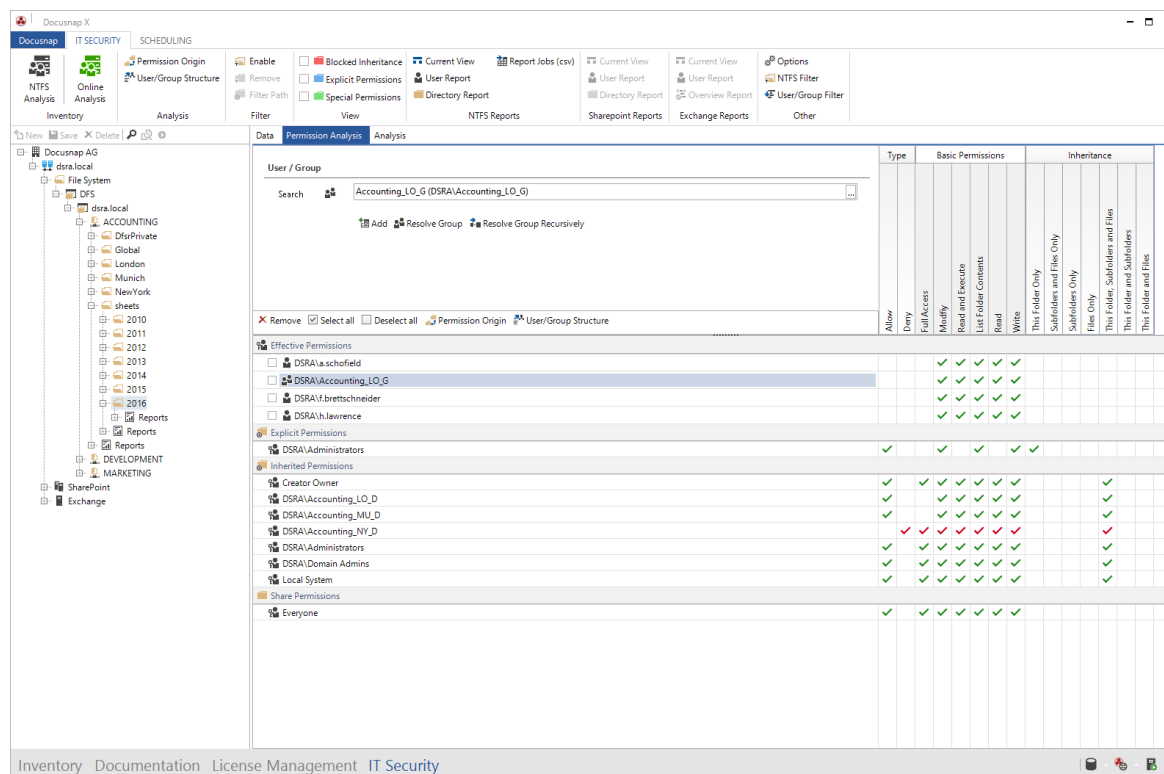


2.6.2.4 Permissions

The *Permissions* explorer displays the shares that were determined by inventorying the Windows system. After a permission analysis, the tree view reflects the directory structure of the share.

In addition to the permissions of Windows systems, the *Permissions* explorer also displays SharePoint and Exchange permissions for analysis.

For more information on this topic, refer to the [Permission Analysis](#) chapter.



The company is shown at the top level of the tree. Below the company, you can see the associated domains which have been inventoried. Below each domain, you can find the File System, SharePoint, and Exchange nodes where the corresponding permissions are listed.

When you select a directory in the Explorer, the main window displays the *Permission Analysis* tab that includes information on *share permissions*, *inherited permissions*, *explicit permissions*, and the resulting *effective permissions*.

2.6.3 Main Window

Depending on the object selected in the Explorer, a variety of tabs will be displayed in the Docusnap main window. All available tabs are listed below.

Information

Data



[Editor](#)

[Reports](#)

[Additional Information \(comments, financial records, passwords, contracts, tasks\)](#)

[Documents](#)

[Permission Analysis](#)

[Permission Origin](#)

[Group Policies](#)

[Structure](#)

[Diagrams](#)

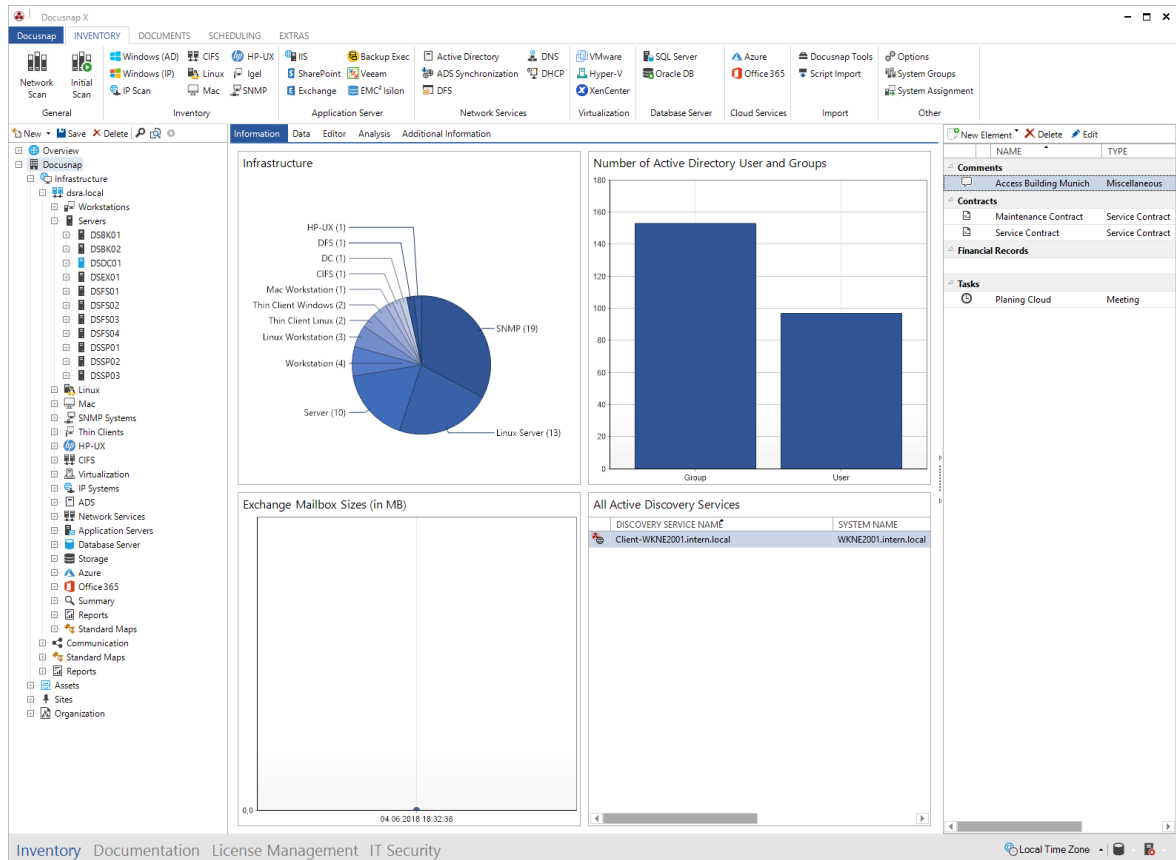
[Analysis](#)

[Concepts](#)

2.6.3.1 Information

When you navigate from one module to another, the *Information* tab displays.

This tab contains a Dashboard with graphical overviews appears. An overview of Docusnap Discovery Services is also available.



2.6.3.2 Data

In general, the *Data* tab displays the data for the object selected in the Explorer.

By double-clicking an entry on the *Data* tab, you select it in the *Data Explorer*.



The screenshot shows the Docusnap X application interface. The top menu bar includes 'Docusnap', 'INVENTORY', 'DOCUMENTS', 'SCHEDULING', and 'EXTRAS'. Below the menu is a toolbar with various icons for different categories like Network Scan, Initial Scan, Windows (AD), CIFS, HP-UX, IIS, Backup Exec, Active Directory, DNS, VMware, SQL Server, Azure, Docusnap Tools, gP Options, and System Groups. The main window is divided into two panes. The left pane is the 'Inventory' tree, showing a hierarchy of nodes: Overview, Docusnap, Infrastructure, Workstations, Servers, Linux, Mac, SNMP, and Office 365. The right pane is the 'Data' table, which displays a list of installed software and their details.

NAME	VERSION	PUBLISHER	INSTALLATION DATE	LICENSE KEY
ADManager Plus	6.5	ZOHO Corp.	12/09/2016 00:00:00	DOCUS-NAPDO-CUSNA-PDOCU-SNAPD
Adobe Reader XI (11.0.09) - Deutsch	11.0.9	Adobe Systems Incorporated	14/11/2014 00:00:00	DOCUS-NAPDO-CUSNA-PDOCU-SNAPD
Docusnap Discovery	10.0.826.2	itelio GmbH	20/10/2017 00:00:00	DOCUS-NAPDO-CUSNA-PDOCU-SNAPD
Microsoft .NET Framework 4 Multi-Targeting Pack	4.0.30319	Microsoft Corporation	14/11/2014 00:00:00	DOCUS-NAPDO-CUSNA-PDOCU-SNAPD
Microsoft Help Viewer 1.1	1.1.40219	Microsoft Corporation	14/11/2014 00:00:00	DOCUS-NAPDO-CUSNA-PDOCU-SNAPD
Microsoft ODBC Driver 11 for SQL Server	12.0.2000.8	Microsoft Corporation	14/11/2014 00:00:00	DOCUS-NAPDO-CUSNA-PDOCU-SNAPD
Microsoft Office Professional Plus 2013	15.0.4569.1506	Microsoft Corporation	24/10/2017 00:00:00	DOCUS-NAPDO-CUSNA-PDOCU-SNAPD
Microsoft Report Viewer 2014 Runtime	12.0.2000.8	Microsoft Corporation	14/11/2014 00:00:00	DOCUS-NAPDO-CUSNA-PDOCU-SNAPD
Microsoft Silverlight	5.1.50907.0	Microsoft Corporation	25/10/2017 00:00:00	DOCUS-NAPDO-CUSNA-PDOCU-SNAPD
Microsoft SQL Server 2008 R2 Management Objects	10.51.2500.0	Microsoft Corporation	14/11/2014 00:00:00	DOCUS-NAPDO-CUSNA-PDOCU-SNAPD
Microsoft SQL Server 2008 Setup Support Files	10.3.5500.0	Microsoft Corporation	14/11/2014 00:00:00	DOCUS-NAPDO-CUSNA-PDOCU-SNAPD
Microsoft SQL Server 2012 Native Client	11.0.2100.60	Microsoft Corporation	14/11/2014 00:00:00	DOCUS-NAPDO-CUSNA-PDOCU-SNAPD
Microsoft SQL Server 2014 (64-bit) Express Edition	12.0.2000.8	Microsoft Corporation	14/11/2014 00:00:00	DOCUS-NAPDO-CUSNA-PDOCU-SNAPD
Microsoft SQL Server 2014 Policies	12.0.2000.8	Microsoft Corporation	14/11/2014 00:00:00	DOCUS-NAPDO-CUSNA-PDOCU-SNAPD
Microsoft SQL Server 2014 Setup (English)	12.0.2269.0	Microsoft Corporation	21/09/2016 00:00:00	DOCUS-NAPDO-CUSNA-PDOCU-SNAPD
Microsoft SQL Server 2014 Transact-SQL Compiler Service	12.0.2269.0	Microsoft Corporation	21/09/2016 00:00:00	DOCUS-NAPDO-CUSNA-PDOCU-SNAPD
Microsoft SQL Server 2014 Transact-SQL ScriptDom	12.0.2000.8	Microsoft Corporation	14/11/2014 00:00:00	DOCUS-NAPDO-CUSNA-PDOCU-SNAPD
Microsoft SQL Server System CLR Types	10.51.2500.0	Microsoft Corporation	14/11/2014 00:00:00	DOCUS-NAPDO-CUSNA-PDOCU-SNAPD
Microsoft System CLR Types for SQL Server 2014	12.0.2000.8	Microsoft Corporation	14/11/2014 00:00:00	DOCUS-NAPDO-CUSNA-PDOCU-SNAPD
Microsoft Visio Professional 2013	15.0.4569.1506	Microsoft Corporation	24/10/2017 00:00:00	DOCUS-NAPDO-CUSNA-PDOCU-SNAPD
Microsoft Visual C++ 2008 Redistributable - x64 9.0.30729.6161	9.0.30729.6161	Microsoft Corporation	30/09/2014 00:00:00	DOCUS-NAPDO-CUSNA-PDOCU-SNAPD
Microsoft Visual C++ 2008 Redistributable - x86 9.0.30729.4148	9.0.30729.4148	Microsoft Corporation	30/09/2014 00:00:00	DOCUS-NAPDO-CUSNA-PDOCU-SNAPD
Microsoft Visual C++ 2008 Redistributable - x86 9.0.30729.6161	9.0.30729.6161	Microsoft Corporation	30/09/2014 00:00:00	DOCUS-NAPDO-CUSNA-PDOCU-SNAPD
Microsoft Visual C++ 2010 x64 Redistributable - 10.0.40219	10.0.40219	Microsoft Corporation	15/09/2016 00:00:00	DOCUS-NAPDO-CUSNA-PDOCU-SNAPD
Microsoft Visual C++ 2010 x86 Redistributable - 10.0.40219	10.0.40219	Microsoft Corporation	15/09/2016 00:00:00	DOCUS-NAPDO-CUSNA-PDOCU-SNAPD
Microsoft Visual C++ 2010 x86 Runtime - 10.0.40219	10.0.40219	Microsoft Corporation	14/11/2014 00:00:00	DOCUS-NAPDO-CUSNA-PDOCU-SNAPD
Microsoft Visual Studio 2010 Shell (Isolated) - ENU	10.0.40219	Microsoft Corporation	14/11/2014 00:00:00	DOCUS-NAPDO-CUSNA-PDOCU-SNAPD
Microsoft Visual Studio 2010 Tools for Office Runtime (x64)	10.0.50903	Microsoft Corporation	14/11/2014 00:00:00	DOCUS-NAPDO-CUSNA-PDOCU-SNAPD
Microsoft VSS Writer for SQL Server 2014	12.0.2000.8	Microsoft Corporation	14/11/2014 00:00:00	DOCUS-NAPDO-CUSNA-PDOCU-SNAPD
Microsoft Windows 8.1 Enterprise	6.3.9600	Microsoft Corporation	30/09/2014 00:00:00	DOCUS-NAPDO-CUSNA-PDOCU-SNAPD
SQL Server Browser for SQL Server 2014	12.0.2000.8	Microsoft Corporation	14/11/2014 00:00:00	DOCUS-NAPDO-CUSNA-PDOCU-SNAPD
Visual Studio 2010 Prerequisites - English	10.0.40219	Microsoft Corporation	14/11/2014 00:00:00	DOCUS-NAPDO-CUSNA-PDOCU-SNAPD
VMware Tools	10.1.0.4449150	VMware, Inc.	28/12/2016 00:00:00	DOCUS-NAPDO-CUSNA-PDOCU-SNAPD
Windows Internet Explorer 11	11.0.9600.18538	Microsoft Corporation		DOCUS-NAPDO-CUSNA-PDOCU-SNAPD

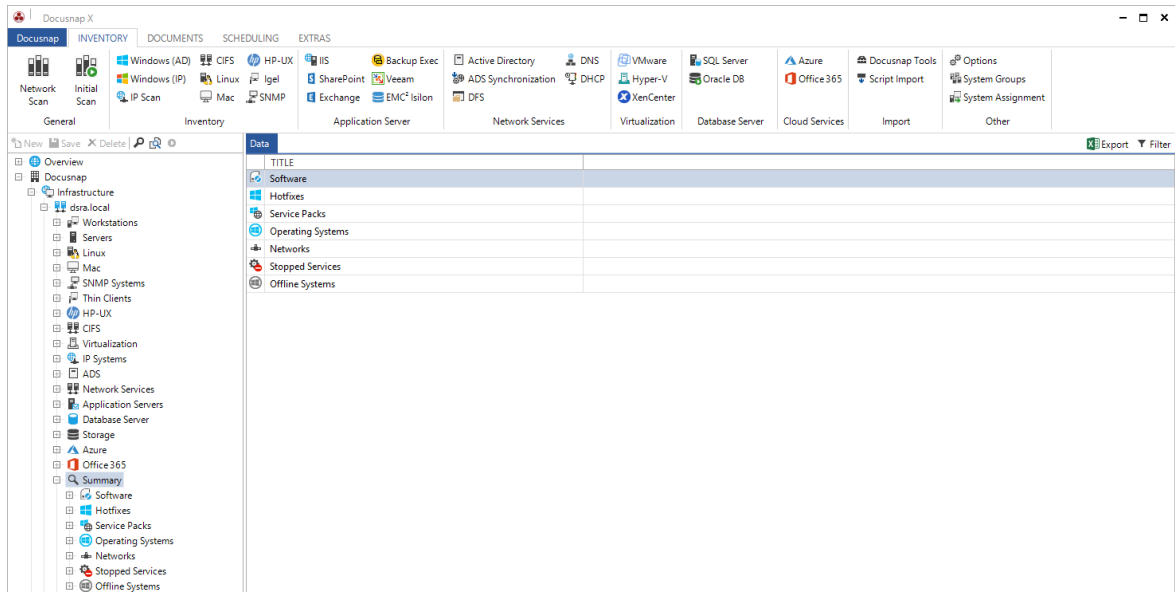
If an object you select in the Explorer contains data, the corresponding object data will be displayed on the *Data* tab.

If the object selected in the Explorer has children, the content of the next level below will be shown on the *Data* tab.

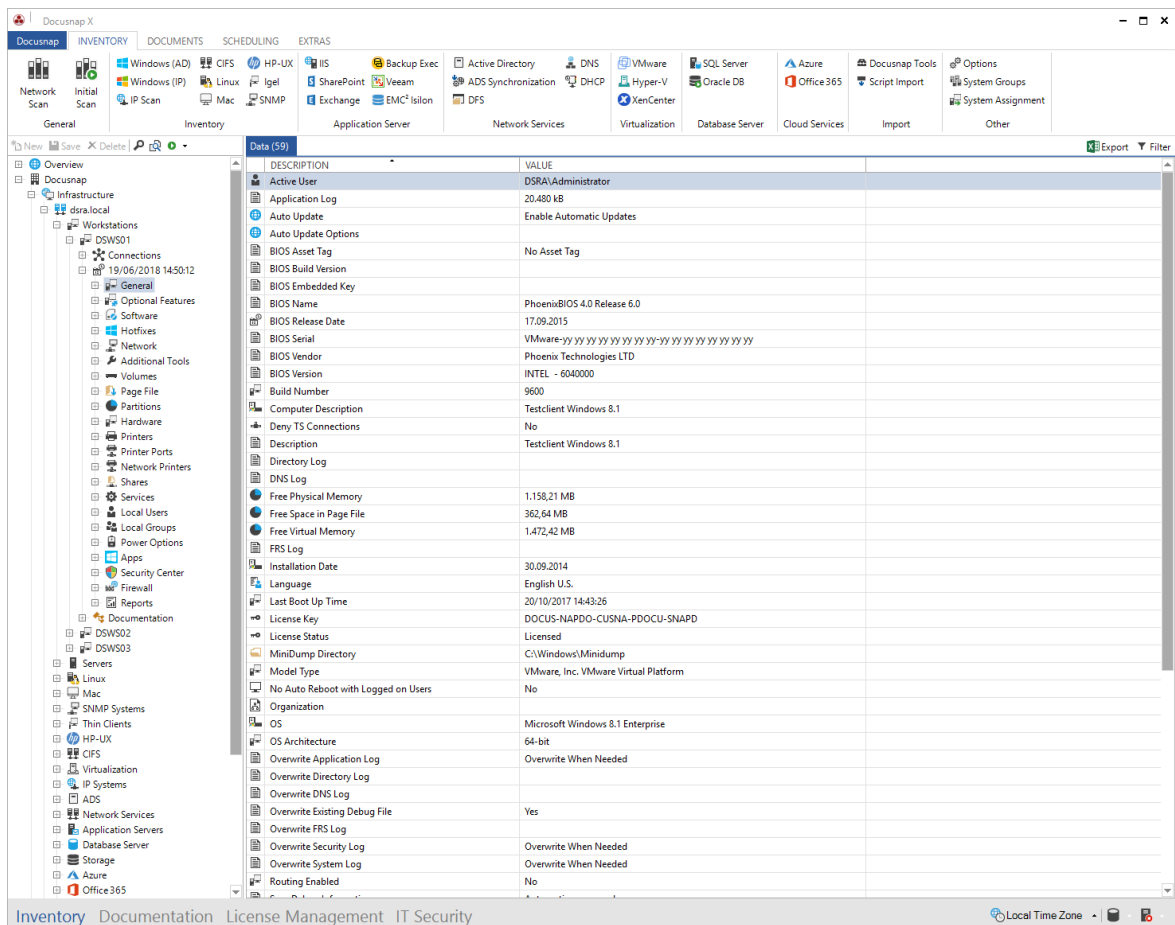
If the nodes at the level below the object selected in the Explorer contain data and titles, only the data will be displayed on the *Data* tab.

If the nodes at the level below the object selected in the Explorer only contain titles, these will be displayed on the *Data* tab.

Introduction



If the data of the child object can only occur once per parent object, they will be displayed in an alternative way. For example, there is only one record for *General*, i.e. general information about a Windows system. In the alternative representation, this data will not be presented as a table, but rather with their designation in the first column and the associated value in the second column.



By right-clicking anywhere in the main window, you open a context menu that enables you to hide or unhide columns as desired. Furthermore, you can change the order of columns simply by dragging them to the desired location with the mouse. When you click a column heading, the table will be sorted by this column. In addition, you can modify the column widths as desired. These changes will not be stored globally for all users, but rather separately for each individual user.

If you wish to undo these changes, open the context menu and restore the default settings by clicking *Reset*.

By clicking the *Filter* button on the top of the *Data* pane, you open the Docusnap filter. Using the *Export* button, you can export the contents of the Data tab to an unstructured Excel list. In addition, you can select the desired data items by applying an appropriate filter. For an explanation of the filter functionality, see the [Filters](#) section.

The screenshot displays the Docusnap X application window. The top menu bar includes 'Docusnap', 'INVENTORY', 'DOCUMENTS', 'SCHEDULING', and 'EXTRAS'. Below this is a toolbar with various icons for network, initial scan, IP scan, and other tools. The main interface is divided into three panes: 'Inventory' on the left, 'Data (34)' in the center, and a right-hand pane. The 'Data' pane shows a table with columns: NAME, VERSION, PUBLISHER, INSTALLATION DATE, and LICENSE KEY. A context menu is open over the 'PUBLISHER' column, showing options like 'Excel Export', 'Disable Filter', 'Column Options', 'Reset Columns', and 'Filter'. The 'Column Options' sub-menu is also visible, showing checkboxes for NAME, VERSION, PUBLISHER, INSTALLATION DATE, LICENSE KEY, DESCRIPTION, and SOFTWARE GUID. The 'Inventory' pane on the left shows a tree view of the system's infrastructure, including workstations, servers, and various services.

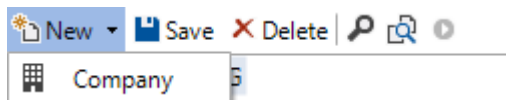
2.6.3.3 Editor

In the *Editor* tab you can enter additional information into data entry screens to add them to the database. This may include information about the company, additional systems, equipment, etc. The *Editor* tab will only be displayed if the object selected in the Explorer is *editable*. For example, if you want to create an entry manually, a blank data entry screen will open in the editor where you can

enter the required information. Additional tabs, such as Data, Documents or the various tabs for the additional information will only be displayed after you have saved the data entered in the editor.

For all editable objects displayed in the tree view, data entry screens have been predefined which allow quick and easy editing of all available data directly from the Docusnap tree view. The data entry screens are part of the user interface with the database. All data you enter here, will be basically validated and error messages will be generated, if appropriate.

When you select an object in the Explorer, the corresponding data entry screen is displayed on the *Editor* tab, provided the object is *editable*. The data for an editable object will be shown on the data entry screen and can be edited. When you need to create a new entry manually, a blank data entry screen is displayed on the *Editor* tab where you can enter the required data.



In order to create a new entry, you must select the object at that same level or the object one level above. Clicking the *New* button on the ribbon, opens a list with the objects that can be created at that level. Once you have selected the object type to be created, the associated data entry screen will be displayed. After you have entered all required information, click the *Save* button to save your data. To delete entries that are no longer needed, click the *Delete* button.

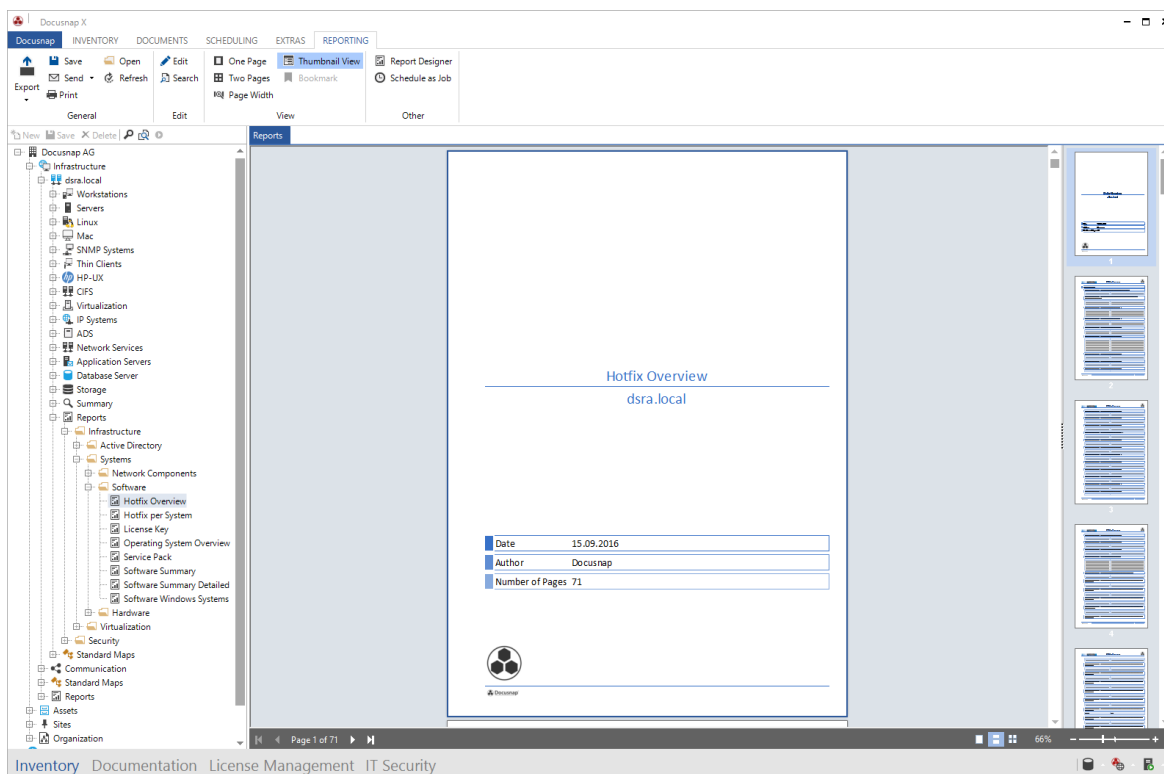
The screenshot shows the Docusnap X application interface. The top menu bar includes 'Docusnap X', 'DOCUMENTS', 'SCHEDULING', and 'EXTRAS'. Below this is a toolbar with various icons for different system types and services. The main window is divided into two panes. The left pane shows a tree view of the 'Inventory' section, with 'dsra.local' selected. The right pane is the 'Editor' tab, which contains a form for creating a new entry. The form fields are: Company Name, Street, No., Zip, City, State, Country (set to Germany), Phone Number, Fax Number, Email, Website, Customer Number, and Description. The Description field has a rich text editor with a toolbar.

If you select an editable object that has already been saved, the associated data entry screen opens on the *Editor* tab, populated with the previously saved data.

This screenshot shows the same Docusnap X application, but now the 'Editor' tab is populated with data from a previously saved entry. The form fields are filled with the following information: Company Name: Docusnap, Street: 36 Old Jewry, No.: 6, Zip: EC2R 8DD, City: London, State: , Country: United Kingdom, Phone Number: , Fax Number: , Email: , Website: , Customer Number: . The Description field is empty. The left pane shows the same tree view, with 'dsra.local' selected.

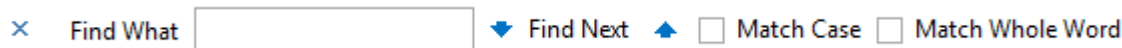
2.6.3.4 Reports

When you select a *report-type* object in the Explorer, a corresponding report will be created and displayed on the *Reports* tab in the main window. Thumbnails of all report pages will be displayed to the right of the main window. If you want to hide them, you can do so by clicking the *Thumbnail View* button on the *Reporting* ribbon. If a report has bookmarks, they will be displayed on the left side of the window. You can toggle the display of the bookmarks pane on and off using the *Bookmark* button on the *Reporting* ribbon.



The navigation and search bar is displayed at the bottom of the main window. You will find the zoom functions in the bottom right corner. In addition, the desired page layout can be selected there.

When you click the *Search* button on the *Reporting* ribbon, a search bar opens at the bottom of the main window. Here, you can enter your search criteria.



2.6.3.5 Additional Information

Additional Information can be used to store further information about individual objects. Using extensions, you can create [comments](#), [financial records](#), [passwords](#), [contracts](#) and [tasks](#).

The tabs for entering comments, financial records, passwords, contracts or tasks will appear when you select the respective object in the Data Explorer. Alternatively, the additional information can also be entered under the heading *Organization* in the inventory tree.

2.6.3.6 Documents

The *Documents* tab displays the documents created for the object selected in the tree view. If you have created a document for an object by using the *Documentation* module, it will be displayed on the *Documents* tab.

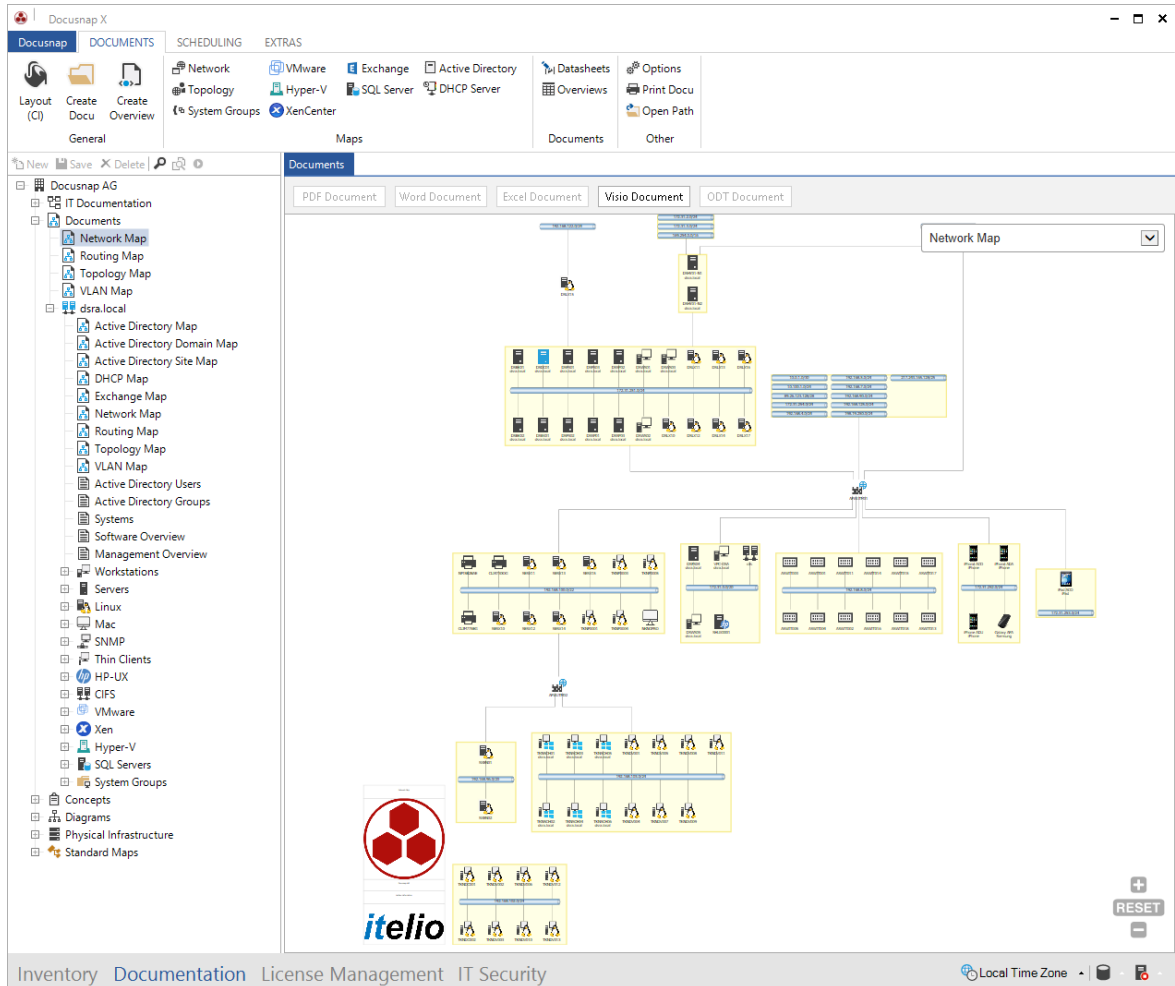
For each device that has been inventoried, a datasheet will be displayed. If a Visio map has been created for an object, you can view it on the *Documents* tab of the main window.

In the *Documents* tree view, the document generated by Docusnap is displayed at its proper location. If no document has been created for a node in the tree view, a Dashboard appears that helps you with the creation of the desired document.

Introduction



Generated documents can only be displayed if the documentation path selected to create the document matches the one specified in the *Options - Documentation* dialog.



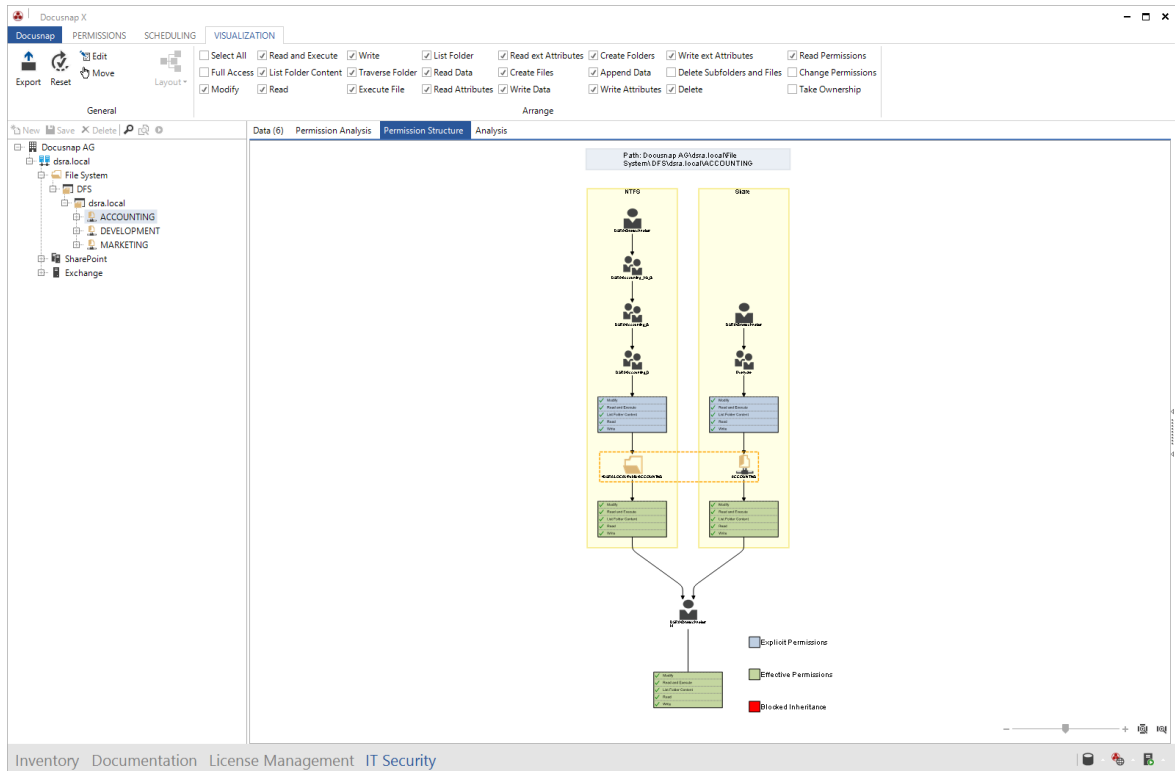
2.6.3.7 Permission Analysis

The *Permission Analysis* tab displays the permissions related to the object that is currently selected in the tree view. Here, you can find information on share permissions as well as explicit and inherited permissions. The columns indicate whether a permission was granted or denied. You can also see what kind of permissions it is and how it is inherited. For the analysis, any number of users or groups can be selected. For each selection, the currently valid permissions are shown.

The screenshot shows the Docusnap X software interface. On the left is a tree view of the file system. The main pane is titled 'Permission Analysis' and shows a table of permissions for the selected object 'Accounting_LO_G (DSRA\Accounting_LO_G)'. The table has columns for 'Type', 'Basic Permissions', and 'Inheritance'. The 'Basic Permissions' column includes 'Allow', 'Deny', 'Full Control', 'Modify', 'Read and Execute', 'List Folder Contents', 'Read', and 'Write'. The 'Inheritance' column includes 'This Folder Only', 'Subfolders and Files Only', 'File Only', 'This Folder, Subfolders and Files', and 'This Folder and Subfolders'. The table lists permissions for various users and groups, including 'DSRA\Accounting_LO_G', 'DSRA\h.brettschneider', 'DSRA\h.lawrence', 'DSRA\Administrators', 'DSRA\Domain Admins', 'Local System', and 'Everyone'. The 'Effective Permissions' section shows that 'DSRA\Accounting_LO_G' has 'Full Control' and 'Modify' permissions granted.

2.6.3.8 Permission Origin

On the *Permission Structure* tab, you can see how a user or group obtained a certain permission. By selecting an individual permission on the left, you can filter the structure on that specific permission.



2.6.3.9 Group Policies

In Docusnap you can scan group policies and display them with the corresponding organizational units or the associated domain. The group policies will then be displayed on the *Group Policy* tab.

The screenshot displays the Docusnap X application window. The left sidebar shows a tree view of the network infrastructure, including 'Docusnap AG', 'Infrastructure', 'dsra.local', 'Workstations', 'Servers', 'Linux', 'Mac', 'Thin Clients', 'HP-UX', 'CIFS', 'Virtualization', 'IP Systems', and 'ADS'. The main pane is titled 'Default Domain Controllers Policy' and shows details, links, security filtering, delegation, and computer configuration for the policy.

Default Domain Controllers Policy
Data collected on: 15.09.2016 14:06:27

General

Details

Domain	DSRA.LOCAL
Owner	DSRA\Domain Admins
Created	01.05.2014 16:50:42
Modified	17.03.2016 18:49:04
User Revisions	0 (AD), 0 (SYSVOL)
Computer Revisions	28 (AD), 28 (SYSVOL)
Unique ID	{6AC1786C-916F-11D2-945F-00C04F8984F9}
GPO Status	Enabled

Links

Location	Enforced	Link Status	Path
Domain Controllers	No	Enabled	DSRA.LOCAL/Domain Controllers

This list only includes links in the domain of the GPO.

Security Filtering

The settings in this GPO can only apply to the following groups, users, and computers:

Name
NT AUTHORITY\Authenticated Users

Delegation

These groups and users have the specified permission for this GPO

Name	Allowed Permissions	Inherited
NT AUTHORITY\Authenticated Users	Read from Security Filtering	No
NT AUTHORITY\ENTERPRISE DOMAIN CONTROLLERS	Read	No
NT AUTHORITY\SYSTEM	Edit settings, delete, modify security	No

Computer Configuration (Enabled)

Policies

Windows Settings

Security Settings

Local Policies/User Rights Assignment

Policy	Setting
Access this computer from the network	Everyone, BUILTIN\Administrators, NT AUTHORITY\Authenticated Users, NT AUTHORITY\ENTERPRISE DOMAIN CONTROLLERS, BUILTIN\Pre-Windows 2000 Compatible Access
Act as part of the operating system	NT AUTHORITY\Authenticated Users
Add workstations to domain	IIS APPPOOL\DefaultAppPool, IIS APPPOOL\NET v4.5, NT AUTHORITY\LOCAL SERVICE, NT AUTHORITY\NETWORK SERVICE, BUILTIN\Administrators, IIS APPPOOL\NET v4.5 Classic
Adjust memory quotas for a process	BUILTIN\Administrators, BUILTIN\Backup Operators, BUILTIN\Account Operators, BUILTIN\Server Operators, BUILTIN\Users, Docusnap, NT AUTHORITY\ENTERPRISE DOMAIN CONTROLLERS
Allow log on locally	BUILTIN\Administrators, BUILTIN\Backup Operators, BUILTIN\Account Operators, BUILTIN\Server Operators, BUILTIN\Users, Docusnap, NT AUTHORITY\ENTERPRISE DOMAIN CONTROLLERS

2.6.3.10 Structure

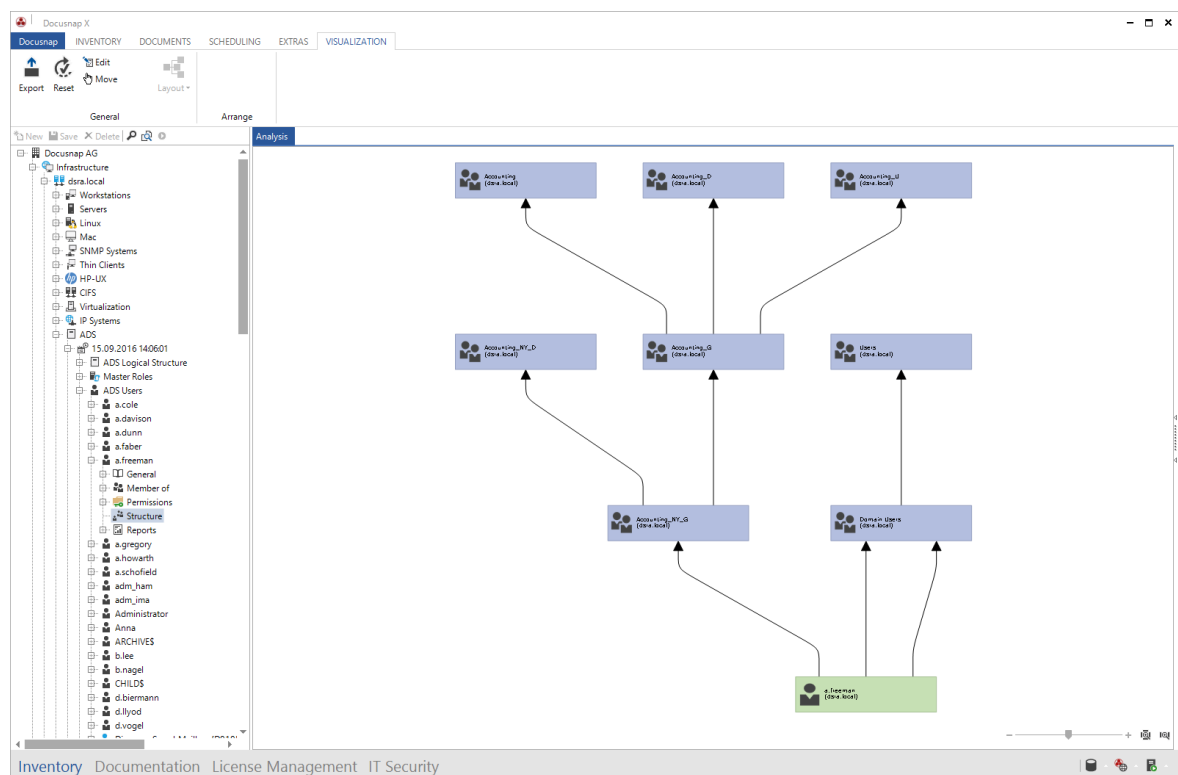
The *Analysis* tab will be displayed in the main window when you select an *Active Directory user* or an *Active Directory group*. This tab shows group nesting as well as user nesting information.

Using this information, you can find out the following:

- Which group or groups is the user xxx a member of?
- Which members make up the group yyy?

Before you can display this structure, you need to select the desired ADS user or ADS group. When you click the *Analysis* tab, the hierarchy of groups or users is built and shown in a diagram. The 👤 icon indicates a group. Individual users are identified by the 👤 icon.

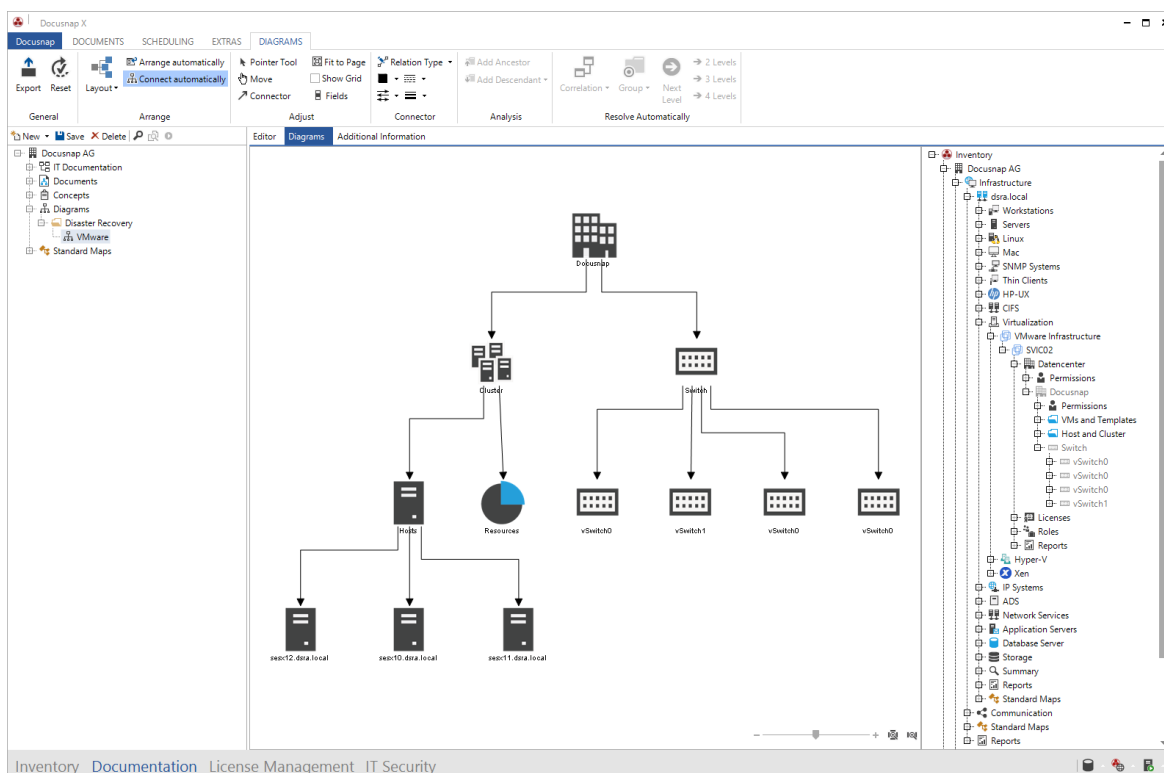
Using the icons in the left pane, you can modify the graphics display or export the displayed diagram to Microsoft Visio or to a .png file.



2.6.3.11 Diagrams

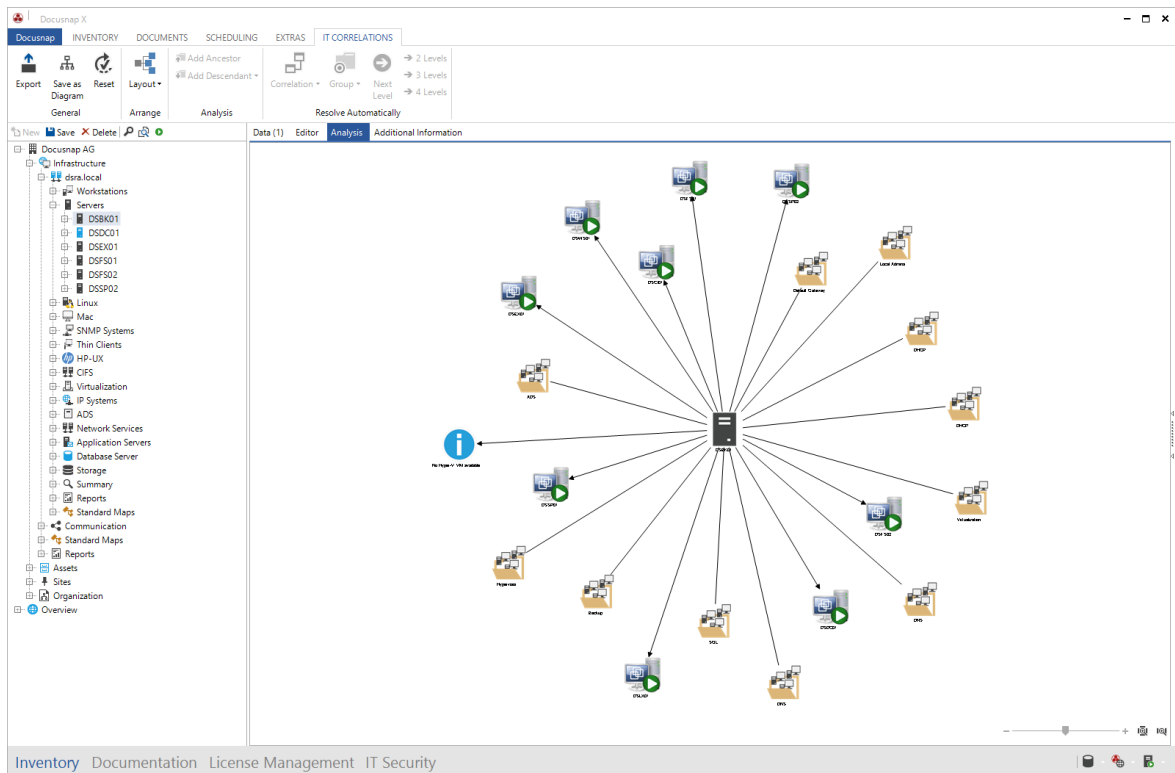
On the *Diagrams* tab, you can create diagrams that show the connections between different elements. The current *Inventory* tree view will be displayed in a separate pane at the right. From this tree, you can drag the components required for the diagram to the main window while holding the left mouse button. When you click a connection line, a data entry screen for the connection properties opens at the bottom of the window. There, you can describe the connection between individual objects in more detail.

In addition you can also add [IT Correlations](#) for the different objects.



2.6.3.12 Analysis

The *Analysis* tab is displayed, if the selected object in the tree view is used in a [Diagram](#) or is defined as a starting object for an [IT Correlation](#).

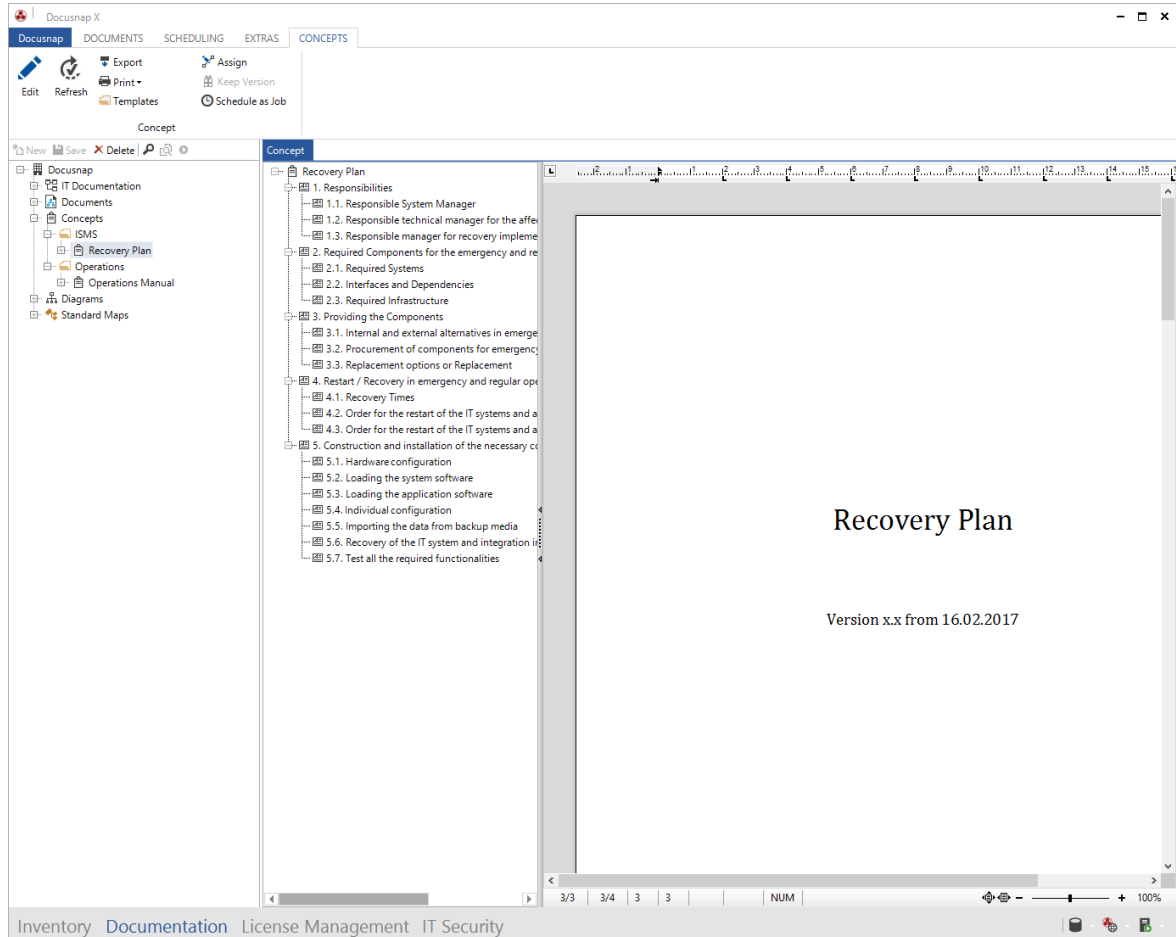


On this tab, the *IT Correlations* and *Diagrams* are displayed. In the window on the right side in addition to the *IT Correlations* all diagrams of this object are listed. Click on the desired entry to switch between the graphics.

2.6.3.13 Concepts

The *IT Concepts* tab displays the document currently selected in the Explorer.

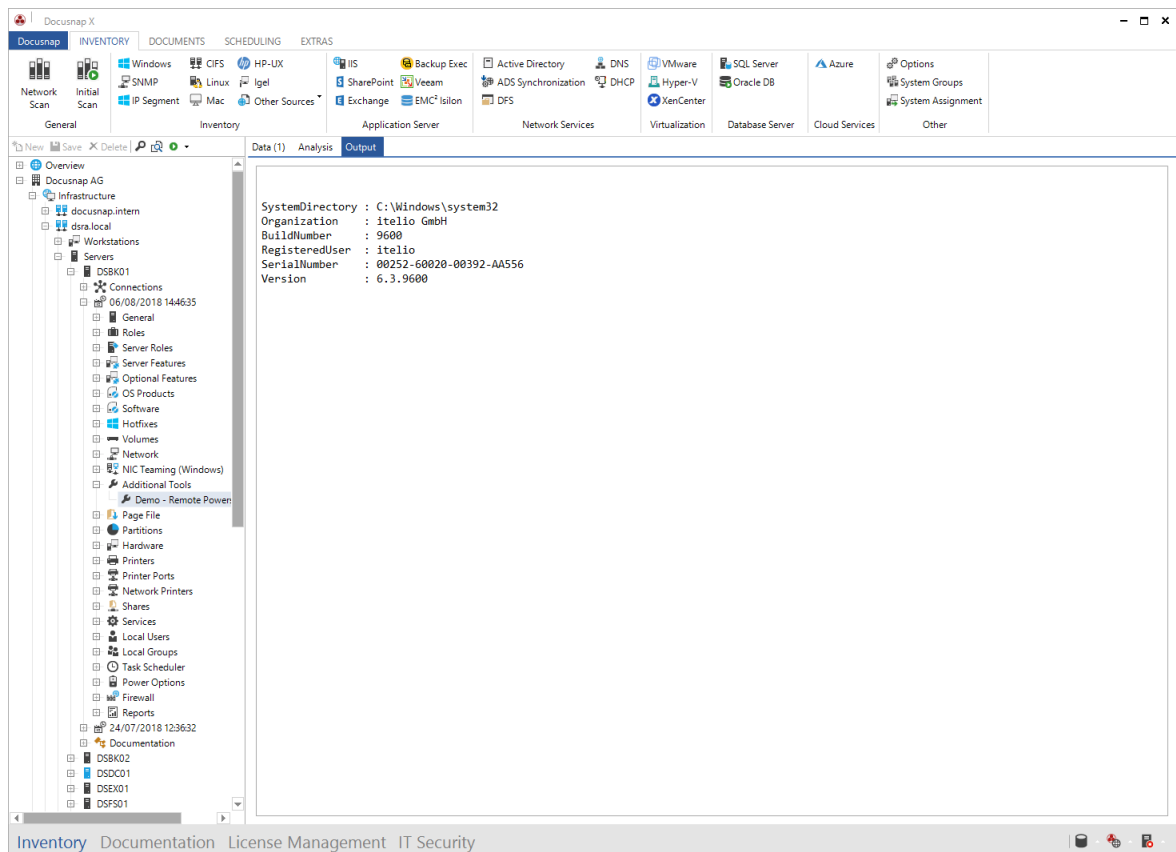
At the bottom, information such as the page number of the concept is displayed.



2.6.3.14 Output

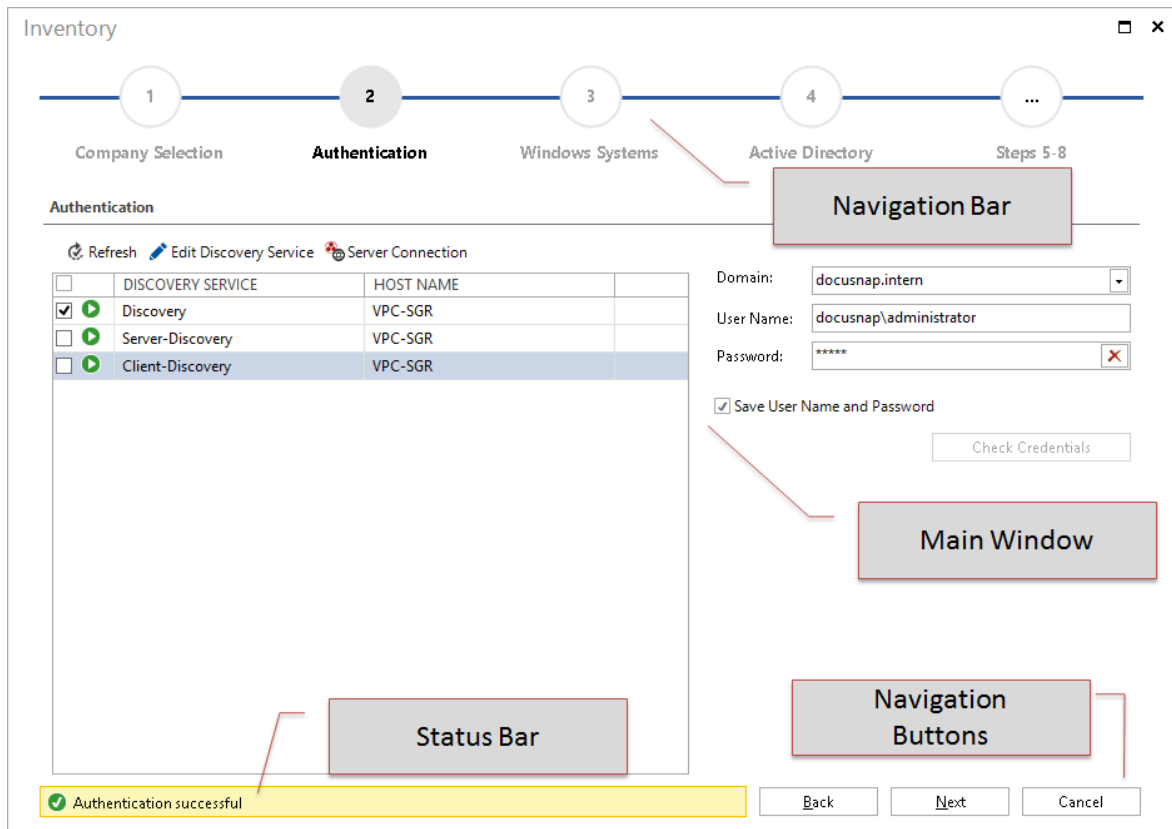
If the result of an additional tool is selected in the Data Explorer, this result is displayed in the *Output* tab.

Introduction



2.7 Basics Wizards

The Docusnap wizards help you in all program modules when you need to perform or configure a process such as scanning the IT environment or creating documentation. As shown in the following illustration, all wizards have more or less the same structure.



In order to be able to use various Docusnap features, the wizards can be extended to include additional steps.

Navigation Bar

The navigation bar on the top of the dialog identifies the current step in the wizard.





Main Windows

The main window of the wizard displays the actual steps, such as selecting the domain to be inventoried, or specifying the Active Directory systems to be scanned.

Status Bar

The status bar of the wizard displays detailed information and messages. If, for example, the authentication for the domain fails, a corresponding error message will be shown which informs you about the cause of the error.

The following message types are used:

- Success 
- Error 
- Warning 
- Information 

Navigation Buttons (*Next, Back, Cancel, Start, Close*)

The *Next* button takes you to the next step in the wizard. If this button is disabled, essential information is missing. You can get information on wrong entries or missing information from the status bar of the wizard.

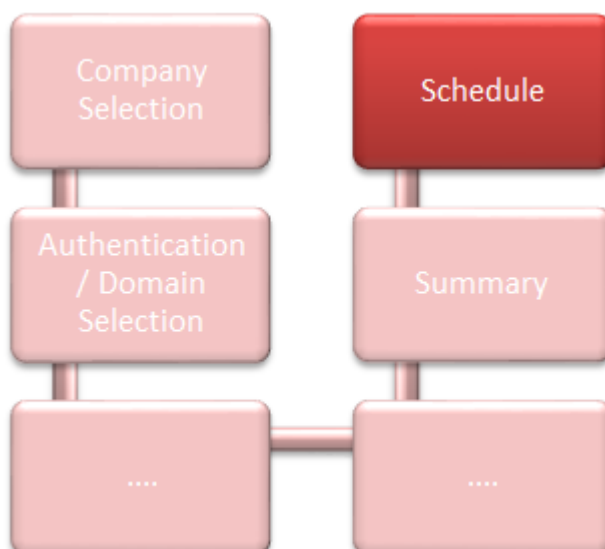
The *Back* button behaves in the same way as the *Next* button, except that clicking the button will take the wizard back one step.

Cancel immediately terminates the wizard. If the wizard is performing a critical action at the time you click the Cancel button, such as a database operation, this action will be safely completed before the wizard closes. This ensures that Docusnap and the Docusnap database remain in a consistent state at all times.

The *Start* button will only become visible when you can start the inventory process. Clicking this button causes the inventory scan to start based on the data you have provided.

2.7.1 Scheduling

The *Scheduling* step is available in all wizards. To schedule the execution the tasks of the wizard at a later point of time, check the checkbox *Schedule Inventory, Documentation etc.*



Scheduling is an essential component of Docusnap and allows you to fully automate the inventory and documentation procedures. Before the *Docusnap Server* can process jobs, the desired settings must be configured and saved for the job.

Inventory

Steps 1-4 5 6 7 8

SNMP Systems Exchange Server Summary **Scheduling**

☒ **Schedule Inventory**

Name: Every week on Monday at 09:00:00. Schedule will be used from 01.12.2017.

Schedule Type:

Time Zone of Execution: (Dropdown menu open showing: DDS Time Zone, Server Time Zone, UTC)

Frequency

Interval: Recurring every: week(s) on: ☒ Monday ☐ Tuesday ☐ Wednesday ☐ Thursday ☐ Friday ☐ Saturday ☐ Sunday

Frequency per day

☒ Once at: Hour(s) Start: End:

☐ Every: Hour(s)

Duration

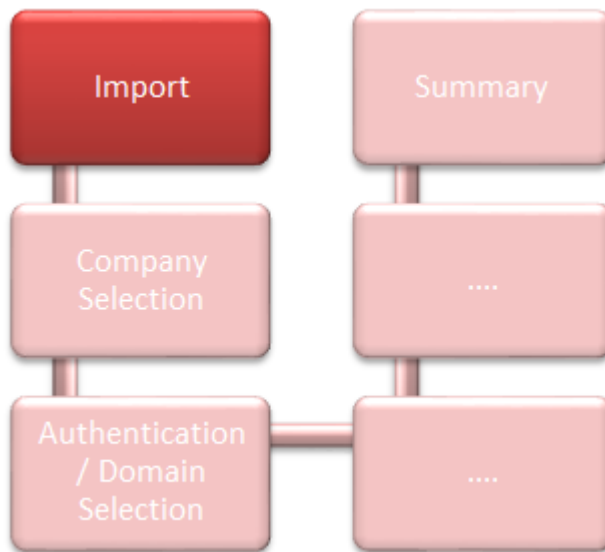
Start Date: ☒ No End Date ☐ End Date:

Assign a unique name to the job in the *Name* field so that it can be identified by its name in the scheduling dialogs. The field to the right can be used to summarize the selected configuration.

If the Docusnap Server and Discovery Service are in different time zones, the [Time Zone Display](#) can be enabled. During scheduling, you can define whether the specified time is from the time zone of the server or the discovery service, or whether it is the UTC time. The display can also be adapted for the data explorer.

2.7.2 Optional: Import

The *Import* step is only displayed in the *Complete Network* wizard if the *Import Saved Settings* checkbox has been enabled on the *General* page of the [Options - Inventory](#) dialog.

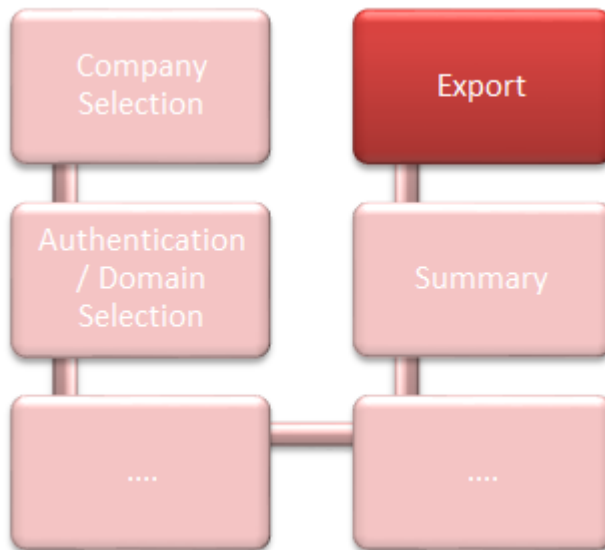


You can use the *Import* step to load a saved configuration. This option is particularly helpful if you need to perform inventory scans repeatedly and with the same settings. Before you can import the .xml file that contains the configuration, it must have been saved in the [Export](#) step. When you select the desired configuration file, all settings saved in this file will be applied. Only the authentication step must be repeated.


The screenshot shows the 'Inventory' application window. At the top, there is a progress bar with five steps: 1 (Import), 2 (Company Selection), 3 (Authentication), 4 (Windows Systems), and 5 (Steps 5-9). The 'Import' step is currently selected and highlighted. Below the progress bar, there is a checkbox labeled 'Einstellungen importieren' which is checked. Underneath, there is a text field labeled 'Dateiname:' containing the path 'C:\Docusnap\CompleteNetwork.xml'. At the bottom left, there is a yellow status bar with a green checkmark and the text 'Import successful'. At the bottom right, there are two buttons: 'Next' and 'Cancel'.

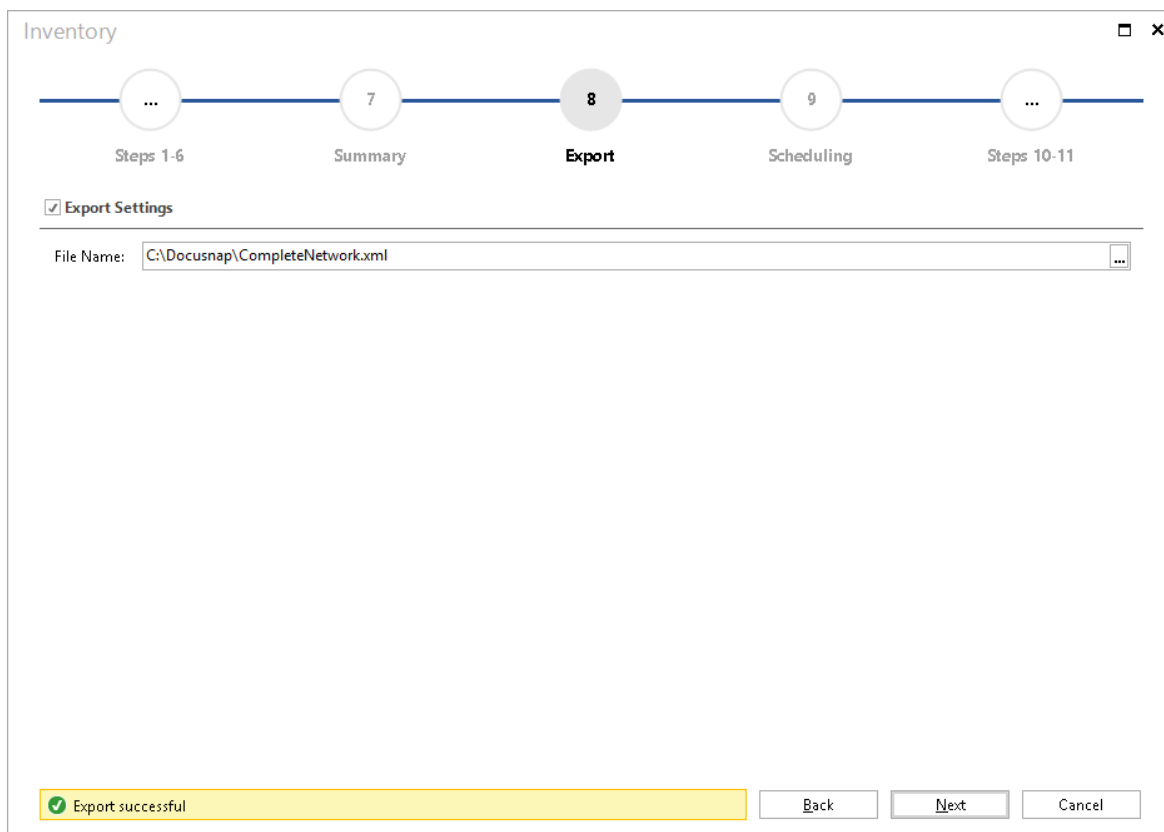
2.7.3 Optional: Export

The *Export* step is only displayed in the *Complete Network* wizard if the *Export Settings* checkbox has been enabled on the *General* page of the [Options - Inventory](#) dialog.



You can save the current configuration of the wizard by means of the *Export* step and reload it by selecting the *Import* step, as needed. This option is particularly helpful if you need to perform inventory scans repeatedly and with the same settings.

In order to enable the export of settings, check the *Export Settings* checkbox. Then, you can click the  icon to select the directory where to save the .xml file. In the *Import* step, you can import this file and thus avoid specifying the same settings again.



2.8 Filtering

Filtering in Main Window

Click the *Filter* button on the Data tab to display the *filter*.



This filter can also be used for other lists, for example in some of the steps of a wizard.

Clicking the *Enable Filter* button displays text fields above the main window columns where you can specify the desired filters or enter keywords. The table displayed in the main pane of the wizard will be filtered by those keywords.

If you want to filter the data simultaneously by multiple filter criteria, these can be separated by a comma. For example *Windows 10*, Windows 8.1**

Data (2) Additional Information	
OS	
▼	*Windows 10*,*Windows 8*
Microsoft Windows 10 Enterprise	
Microsoft Windows 8.1 Enterprise	

In the case that a comma is included in the filter value, it must be marked with a \, otherwise the text before and the text after the comma will be considered as individual filter values.

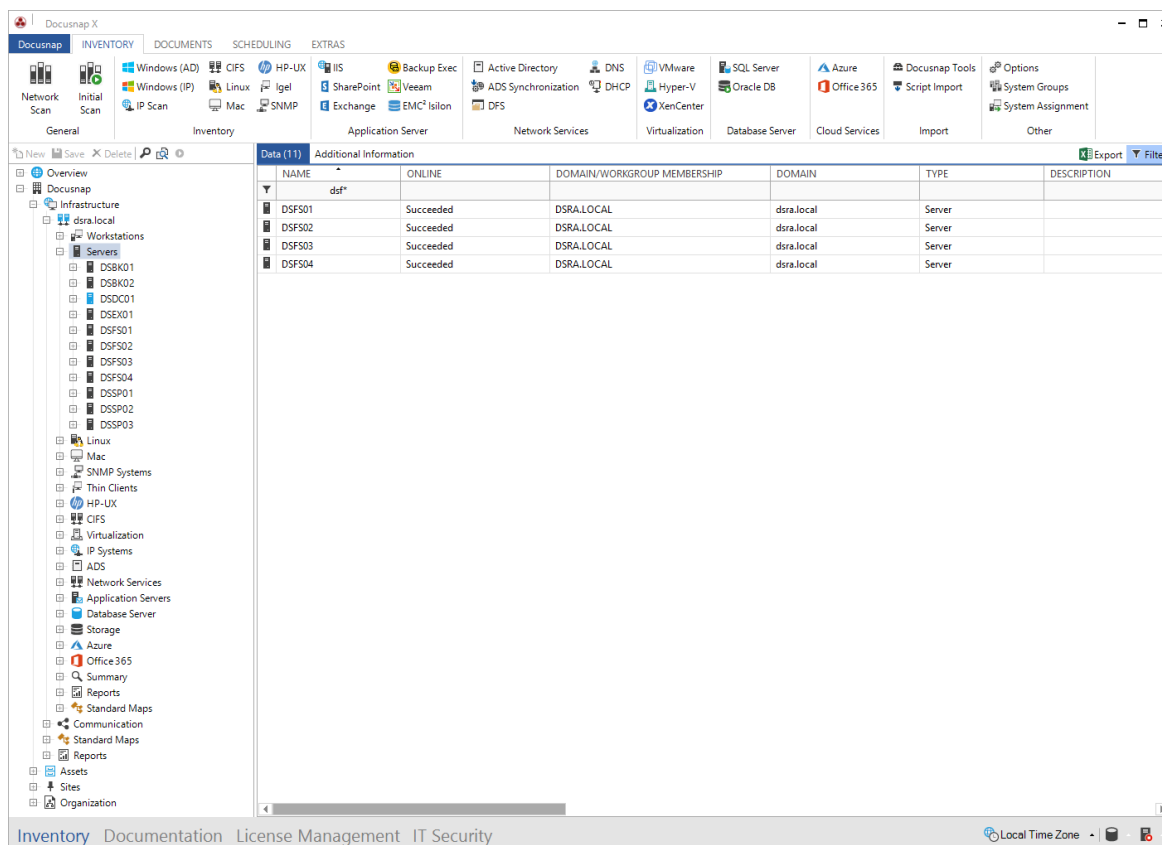
Data (2)		
	PARTITION	CAPACITY
	disk #0\, p*	
	Disk #0, Partition #0	0,34 GB
	Disk #0, Partition #1	39,66 GB

The asterisk (*) and the question mark (?) can be used as wildcards. Example: If you enter the keyword "Docu*", Docusnap will return all records that begin with "Docu" in the corresponding columns. The other way round: The keyword "*docu" will return all records that end with "docu".

The following additional filter options may also be used.

Filtering for Numbers and Dates	Example
>(greater than) or >=(greater than or equal to)	Filters values greater than or equal to the specified value.
<(less than) or <=(less than or equal to)	Filters values that are less than or equal to the specified value.
<>(not equal)	Explicitly excludes the specified value during filtering.


When you have entered all required keywords, apply the filter either by clicking the *Apply Filter* button or by pressing the *Enter* key.



To display all data again without filtering it, either delete the *keywords* from the text fields and re-apply the filter, or remove the filter by clicking the *Remove Filter* button.

To export the current view, as displayed in the main window, to an Excel file, click the *Export* button. After you have saved the file, it will be opened directly in Excel.

Filtering the Explorer

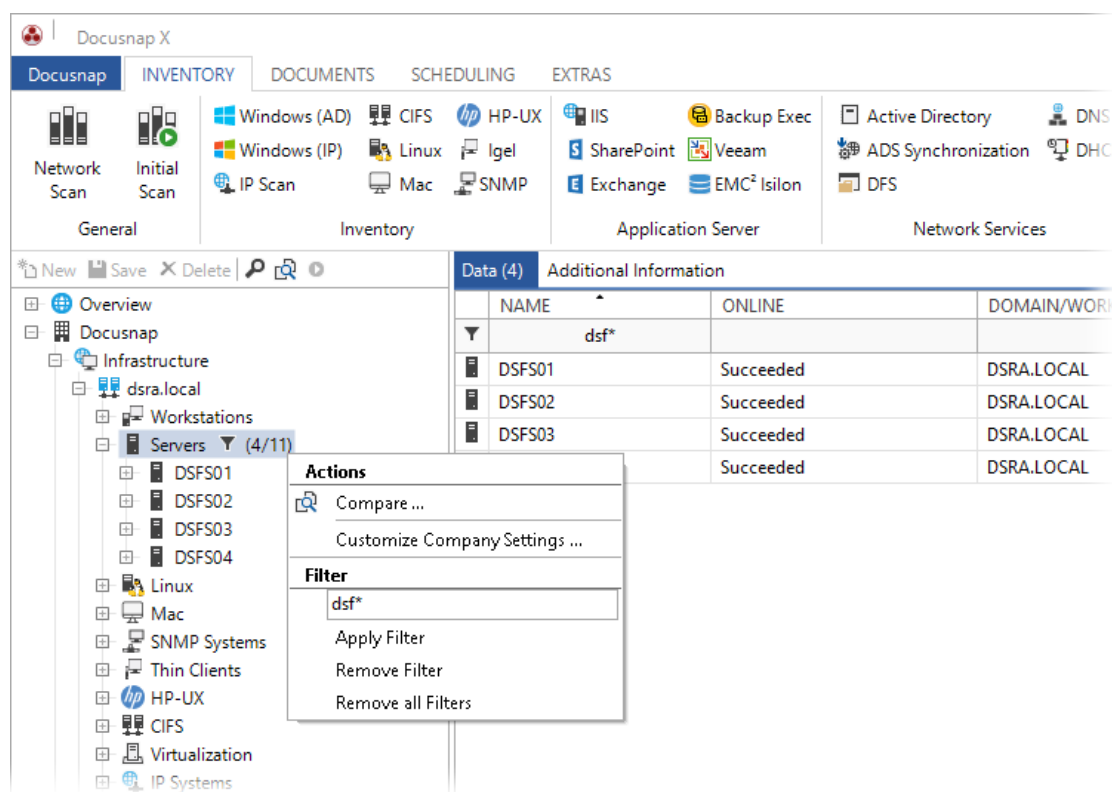
In addition to the filter specified in the main window, it is also possible to filter the nodes of the tree view. In the *Inventory* or *Licenses* tree view, right-click a node to display its context menu where you can specify the desired filter. This way, you can filter the data below the selected node. The filters will be stored on the computer where you are currently working. For this reason, the filters set in the tree view will also be retained when you restart Docusnap. The  icon indicates that a filter is currently applied to the node.

To specify a filter criterion, enter it in the text field below the "Filter" caption. As with the main window filter, both the "*" and "?" wildcards can be used as filter criteria. To enable the filter, either press the *Enter* key or click the *Apply Filter* option.


If a filter is applied to the tree view, the entries in the main window table will be filtered according to the same criteria. As soon as you remove the filter from the main window, Docusnap redisplayes all data. This will, however, not remove the filter

from the tree view. However, removing the filter from the tree view will also remove the filter from the main window.

To remove the filter for the current node, click the *Delete Filter* option from the context menu. To remove the filters for all companies in all tree views, click the *Remove all Filters* option.

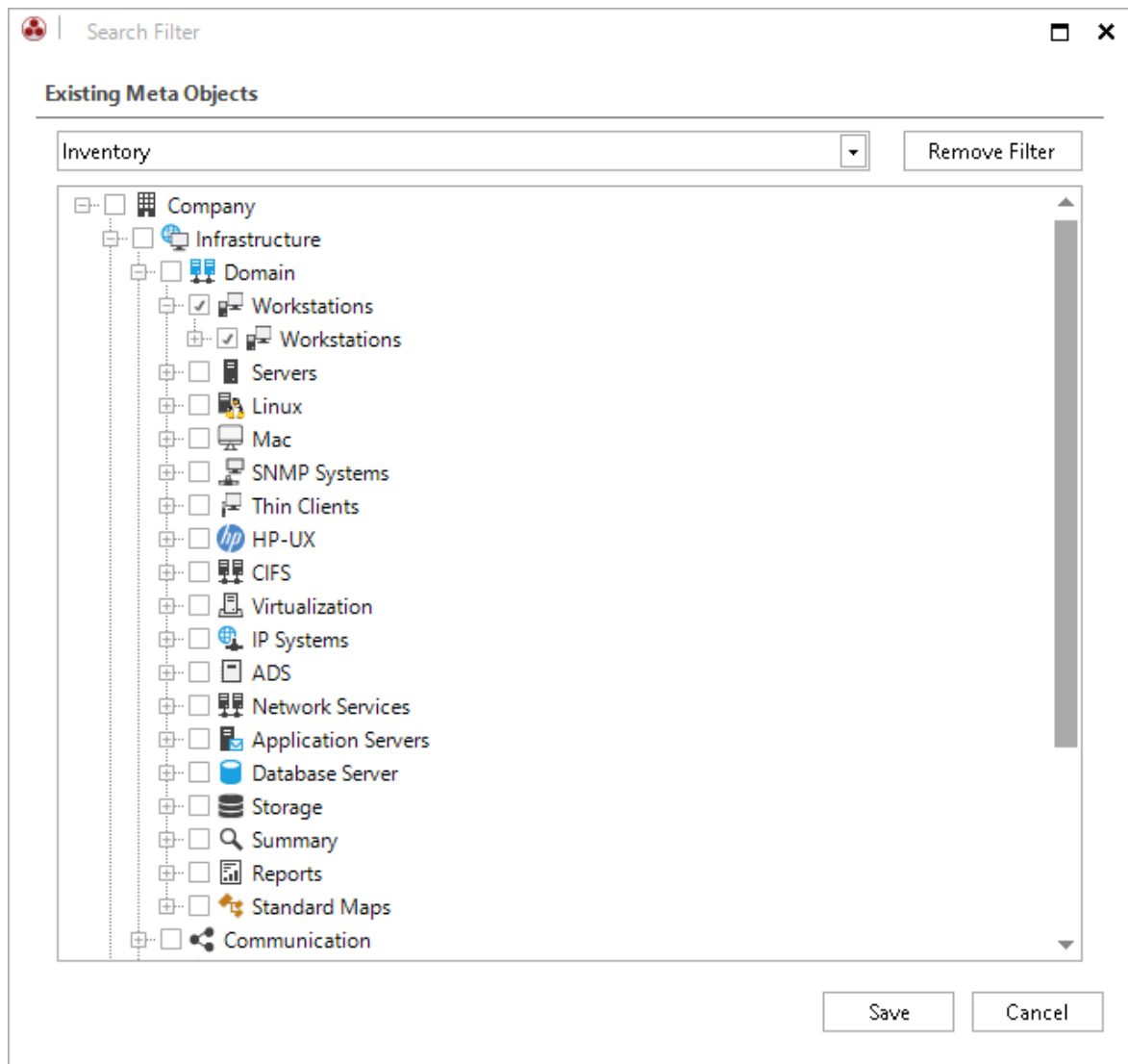


2.9 Search

To perform a full-text search in the database, you can use the *Search* button . Using the Search feature, you can search the entire content of the tree structure for text strings (e.g. portions of license keys, names of software, hotfixes and more).



If no restrictions are made, all tree structures are searched.

To restrict the search to specific nodes to be searched, you can define a filter. The *Search Filter* dialog, that opens when you click the Filter button on the search bar, lists all meta objects. Select the meta objects to be included in the search.



For a full-text search, the following controls are available:

Search: ☐ Archives Filter Searched Data Sets: 1 794

Control	Description
Combo box	Here, you can enter the search string.
Archive	If you <i>enable</i> this checkbox, all existing snapshots will be searched. If the checkbox is <i>disabled</i> , only the current snapshots will be searched.
 / 	Starts or terminates the current search.
Filter	A filter can be used to restrict the search to specific meta objects.

Progress bar

The green progress bar remains visible until the search has completed.

The combo box contains a history of the previously entered search strings. However, these search strings will be discarded when you exit Docusnap. When you restart Docusnap, the combo box will be empty again. Since the full-text search will also find word fragments in the tree view, the search string does not need to be a complete word.

When you start the search, the *Number of Objects* message appears. It indicates how many objects have been searched.

Example

If you enter the search string *Microsoft Office*, the tree view will be searched for items that contain the words *Microsoft Office*. This means that the search will find every object that contains the string *Microsoft Office* (software, hotfixes, printers, services, etc.).

The screenshot displays the Docusnap X application window. The top menu bar includes 'Docusnap', 'INVENTORY', 'DOCUMENTS', 'SCHEDULING', and 'EXTRAS'. Below the menu is a toolbar with various icons for network, initial scan, IP scan, and other functions. The main window is divided into three panes. The left pane shows a tree view of the network infrastructure, with 'Microsoft Office Professional Plus 2013' selected. The middle pane shows a list of search results for 'Microsoft Office', including items like 'Microsoft Windows for Microsoft Windows Security...', 'Microsoft Office Professional Plus 2013', and 'Microsoft Office-Ennenungen'. The right pane shows a detailed view of the selected item, 'Microsoft Office Professional Plus 2013', with fields for NAME, VERSION, PUBLISHER, INSTALLATION DATE, LICENSE KEY, and DESCRIPTION.

NAME	OBJECT	PATH
Microsoft Windows for Microsoft Windows Security...	Hotfixes	Docusnap AG/Infrastructure/dsra...
Microsoft Windows for Microsoft Windows (Update f...	Hotfixes	Docusnap AG/Infrastructure/dsra...
Microsoft Windows for Microsoft Windows (Update f...	Hotfixes	Docusnap AG/Infrastructure/dsra...
Document Conversions Launcher for Microsoft Share...	Services	Docusnap AG/Infrastructure/dsra...
Document Conversions Load Balancer for Microsoft S...	Services	Docusnap AG/Infrastructure/dsra...
Forefront Identity Manager Service	Services	Docusnap AG/Infrastructure/dsra...
Forefront Identity Manager Synchronization Service	Services	Docusnap AG/Infrastructure/dsra...
SharePoint Server Search 15	Services	Docusnap AG/Infrastructure/dsra...
SharePoint Search Host Controller	Services	Docusnap AG/Infrastructure/dsra...
Analytics_0c119366-05b0-416b-aeef-478be3c9f1ba	Shares	Docusnap AG/Infrastructure/dsra...
gthrvsc_0c119366-05b0-416b-aeef-478be3c9f1ba-cra...	Shares	Docusnap AG/Infrastructure/dsra...
Microsoft Office Professional Plus 2013	Software	Docusnap AG/Infrastructure/dsra...
Microsoft Office-Ennenungen	Software	Docusnap AG/Infrastructure/dsra...
Microsoft Office-Setup-Assistent	Software	Docusnap AG/Infrastructure/dsra...
Microsoft Office Professional Plus 2013	Software	Docusnap AG/Assets/Software/Mi...
Microsoft Office-Ennenungen	Software	Docusnap AG/Assets/Software/Mi...
Microsoft Office-Setup-Assistent	Software	Docusnap AG/Assets/Software/Mi...

NAME	VERSION	PUBLISHER	INSTALLATION DATE	LICENSE KEY	DESCRIPTION
Microsoft Office Professional Plus 2013	15.0.4569.1506	Microsoft Corporation	14.11.2014 00:00:00	DOCU-SNAP-DOCU-SNAP-DOCU	

The search results will be displayed in the upper pane of the main window. There, you can see the name, object type and path of the objects found by the search. When you double-click a search result entry in this pane, the associated object will be highlighted in the tree view and its data displayed in the lower pane.

Column	Description
Name	The name of the object in the tree view.
Object	The object type associated with the current tree view level where the search result is located.
Path	Indicates the path to the object in the tree view.



Part



3 Discovery Service

Up to and including the Docusnap Version 6.3, was a decentralized inventory only possible with an additional, full installation and a time-consuming database export and import. The Docusnap Discovery Service is a new part of Docusnap which enables inventory processes to be performed automated in a remote location and then transmit the results to a central Docusnap server.

After successful establishing a connection from a Docusnap Discovery service to a central Docusnap server the inventory jobs can be managed and triggered from the head office.

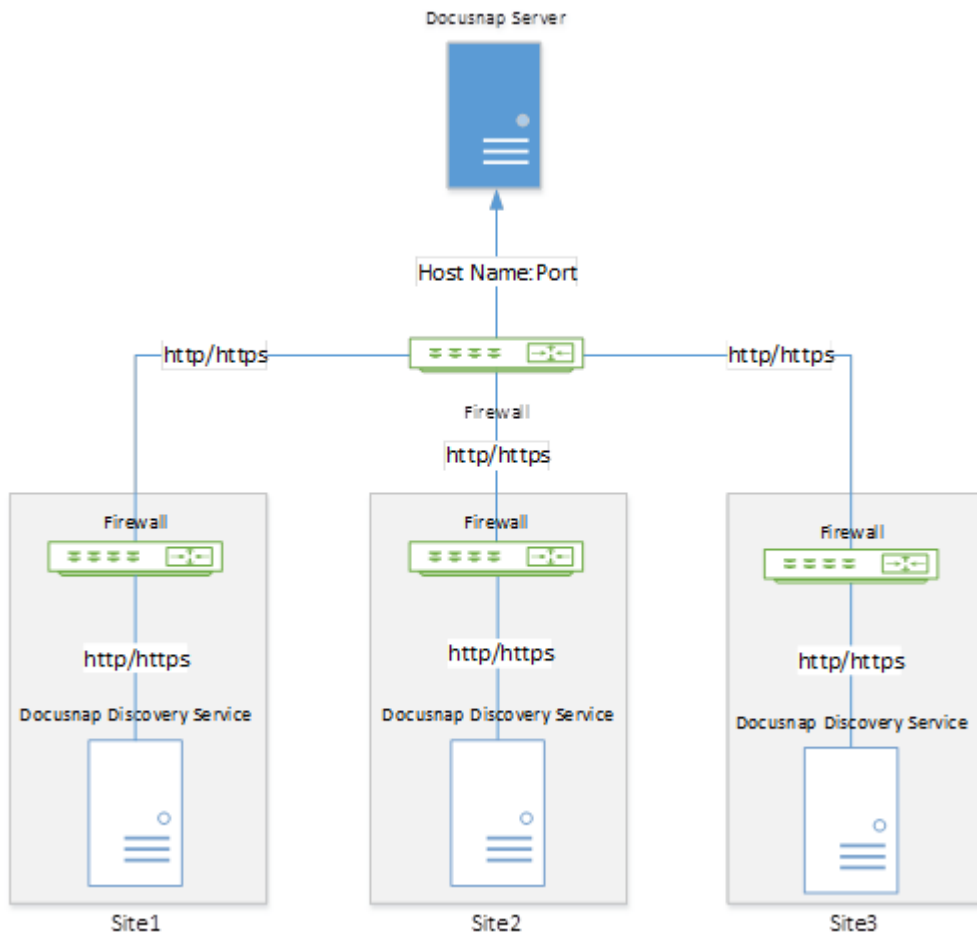
Connection

The connection from the Docusnap Discovery Services to the central Docusnap server is via http or https protocol. By using these standard protocols, it is not necessary to make special firewall configurations at the remote site (Outbound). Data and information can be transmitted in encrypted form.

Data Transport

The transport of data and information is also carried via the http or https protocol.

The results of each job are cached in files on the computer on which the Docusnap Discovery Services are executed and then transmitted to the central server Docusnap.



3.1 Requirements

The use of Docusnap Discovery Services requires on the central site a configured and started Docusnap server for each Docusnap database. At the site, which should be inventoried, the Docusnap Discovery Service is installed on a computer.

System Requirements

Component System Requirements

Operating Windows 7 SP1
Systems

Windows 8, 8.1

Windows 10

Windows Server 2008 SP2

Windows Server 2008 R2 SP1

Windows Server 2012
Windows Server 2012 R2
Windows Server 2016
RAM min. 512 MB, recommended \geq 1GB
CPU \geq 2 Cores
Resolution min. 1024 x 768 Pixel
.NET Framework Version \geq 4.6.1
Windows Version \geq 4.5
Installer

Check Prerequisites

For the successful configuration of Docusnap Discovery Services the configuration of the server Docusnap must be checked.

1. The configuration of Docusnap server must be successfully completed. It is important to activate the Docusnap Server API. This can be done through the configuration wizard.
2. The Docusnap Server service must be running and be available in the network.
3. If the Docusnap Discovery Services is used to inventory, it must be ensured that the central firewall on the corresponding Docusnap Server forwards requests.

External hostname and port: the Docusnap Server API is addressed within the organization by external hostname and port. This name is used both to establish a connection with the Discovery Services as well as with the web client.

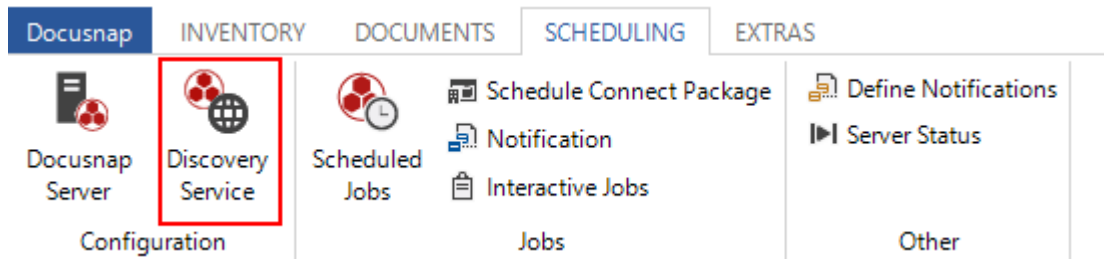
The authentication scheme affects only the authentication options with an Internet browser.

3.2 Configuration in Docusnap

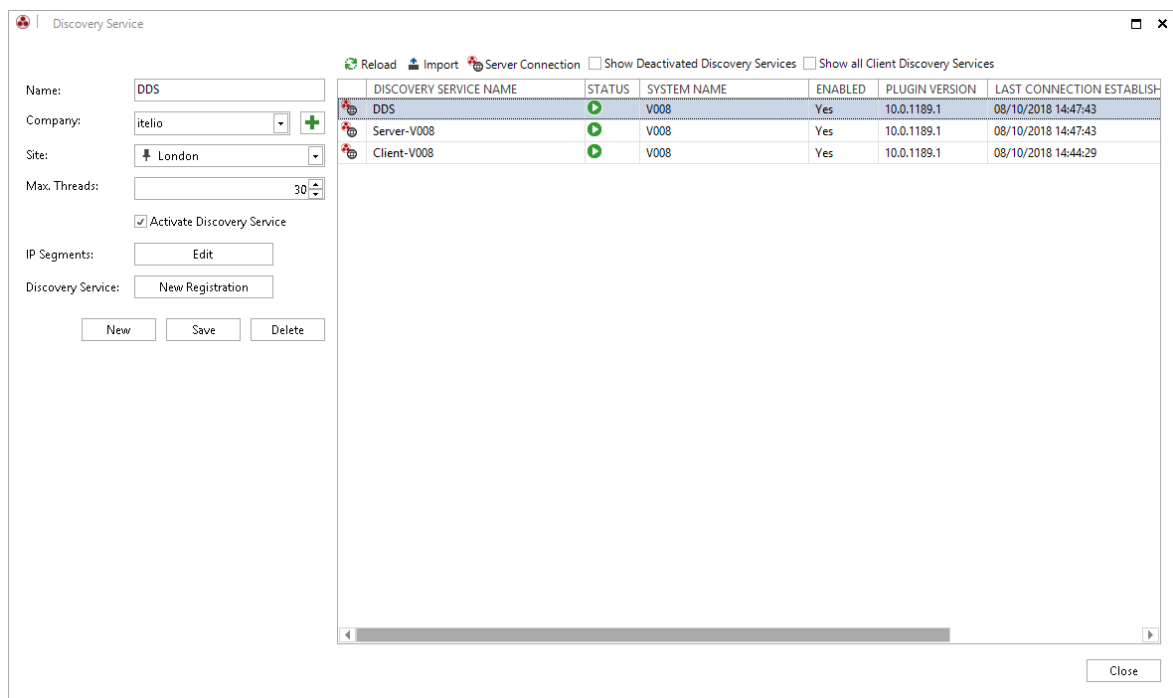
A Docusnap Discovery Service is in Docusnap linked to a client (paired). This is necessary so that the inventoried data can be mapped to the appropriate clients. As part of the pairing process an own encryption for the data exchange is defined as well.

The configuration of Docusnap Discovery Services is started on the Docusnap client.

Discovery Service



Click on the *Discovery Service* button to open the dialog. A new service is created by clicking the *New* button. The name for the Docusnap Discovery Service is specified and the desired company, in which the data should be displayed later, is selected. Optional IP ranges can be specified to limit inventory processes to subnets.



Saving the new Docusnap Discovery Services opens a dialog with which a complete installation package can be generated as a zip file. This zip file installation is then carried out on a computer on site, which should be inventoried.

Create Installation Package

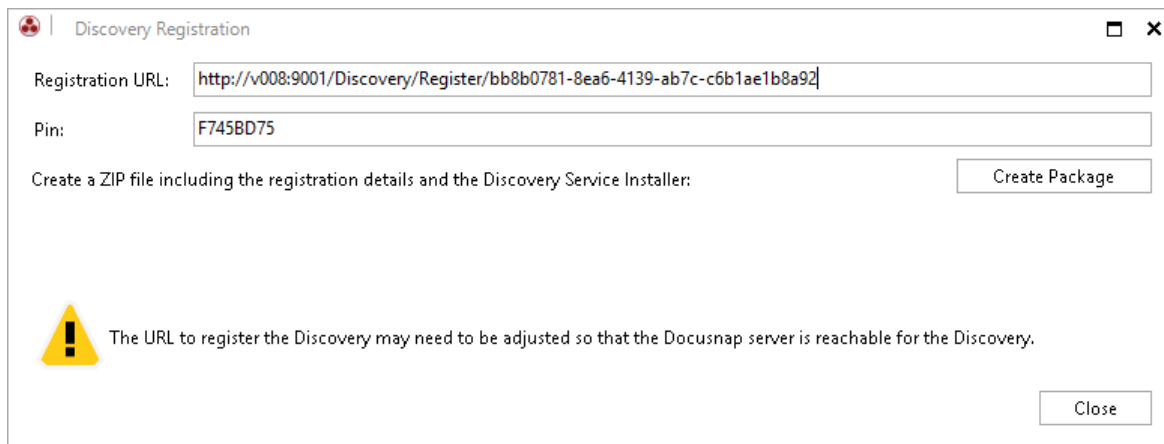
Registration URI

Important: Should the Docusnap Discovery Service be installed at a remote site, the URL must be adapted accordingly. This can be subsequently edited while configuring the Docusnap Discovery Services.

Create Package

Clicking on the button *Create Package* the Docusnap Discovery Service Setup including pairing data is stored in a zip file.






Discovery Registration

Registration URL:

Pin:


Create a ZIP file including the registration details and the Discovery Service Installer: ☐ Create Package

 The URL to register the Discovery may need to be adjusted so that the Docusnap server is reachable for the Discovery.

Close

Import

With the *New* button Discovery Services can be created individually. However, if many DDS are needed, the creation can be time consuming. The *Discovery Service Import* can therefore be used to create several DDS at the same time. Click on the *Import* button to open the dialog. The button is only active when the Docusnap Server is started.

A CSV file can be selected by clicking on the  button. In the CSV file, the values must be separated by ";" in the following order: Discovery Service Name (any name for the DDS), Company (AccountID of the company to which the inventoried data should be stored), Location (SiteID of the location, can remain empty), Max Thread (maximum number of threads for the scan). Docusnap assumes that the first line of the CSV file contains headings and therefore the first line is not included in the import. Click the *Import* button to import the entries as DDS.

As an alternative to CSV import, Discovery Services can also be created using the *Add* button. By clicking on the empty field in the *Discovery Service Name* column, the name for the DDS can be specified. An existing company can be selected in the *Company* column. In the column *Location* a location of the selected company can be selected. The maximum number of threads can also be adjusted.

Click the *Delete* button to delete the selected entry from the list.

Click the *Save* button to save a CSV file. This file contains the URL and the pin for the registration of the DDS. After the dialog has closed, the DDS are added to the list.

Server Connection

The Server API connection is necessary for scheduling and processing jobs for Docusnap Server and Discovery Service. The URL must match the [Docusnap Server](#) setting in the *Server API* step. If there is no server connection, Discovery Services cannot be created.

Deactivated Discovery Services

When a Discovery Service is selected, it can be disabled and enabled using the *Activate Discovery Service* checkbox. Clicking the *Show Deactivated Discovery Services* checkbox displays all disabled DDSs so they can be reactivated.

Client Discovery Services

Each Docusnap installation contains a local Discovery Server. It can be used to perform inventories without having to configure the Docusnap Server. By clicking on the *Show all Client Discovery Services* checkbox, all other client DDSs connected to the same database are displayed in addition to the local DDS of the current system.

3.3 Installation

To use the Docusnap Discovery service at a remote location, this service must be installed on a system locally. The service transmits the inventoried data to a central Docusnap installation.

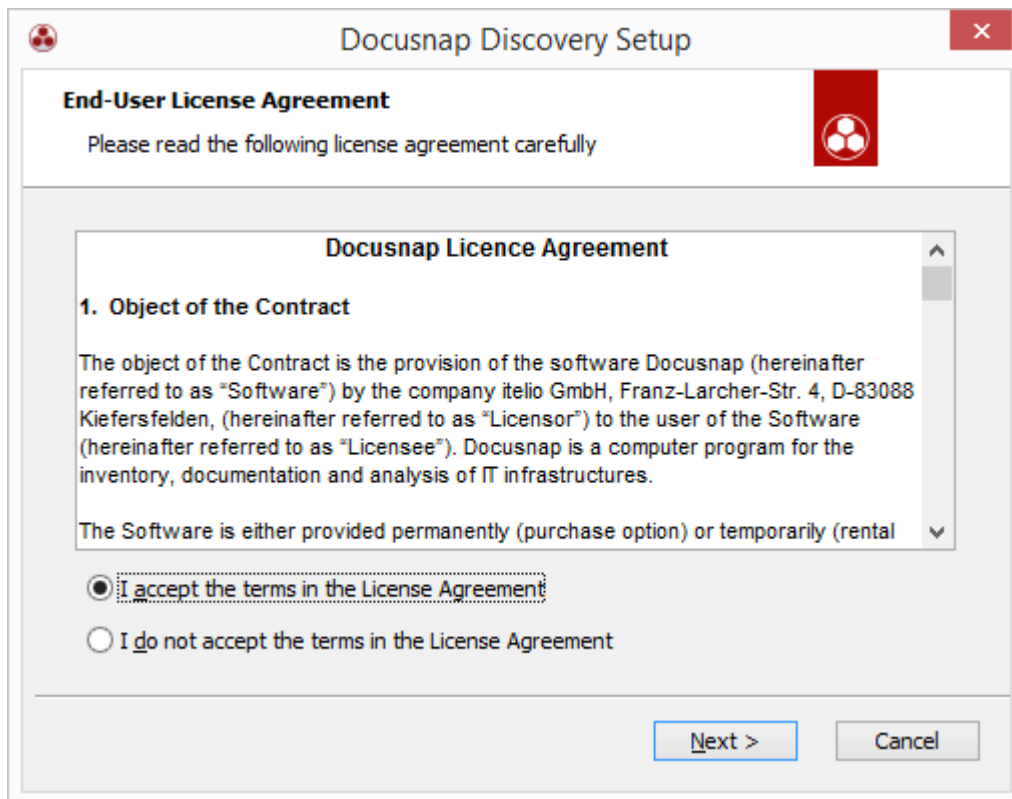
The generated installation package contains two files:

- DocusnapDiscoverySetup.exe
- RegistrationData.txt

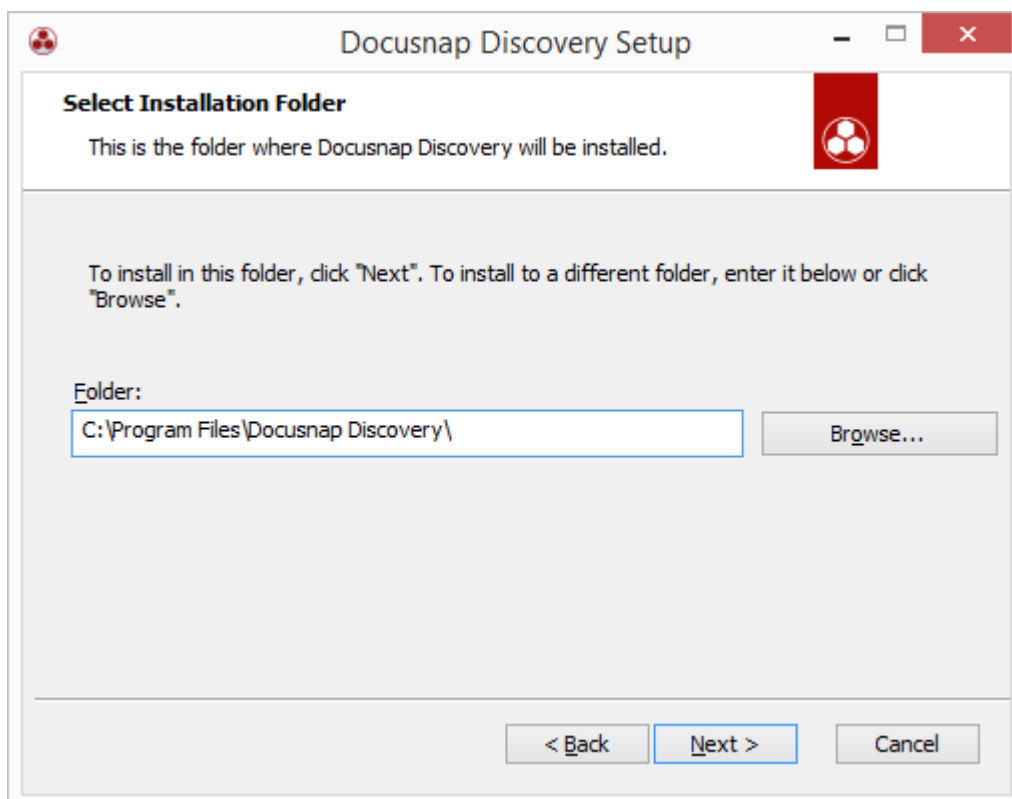
By executing the file *DocusnapDiscoverySetup.exe*, the installation process of Discovery Services is started.

After accepting the license agreement, the Next button is enabled.

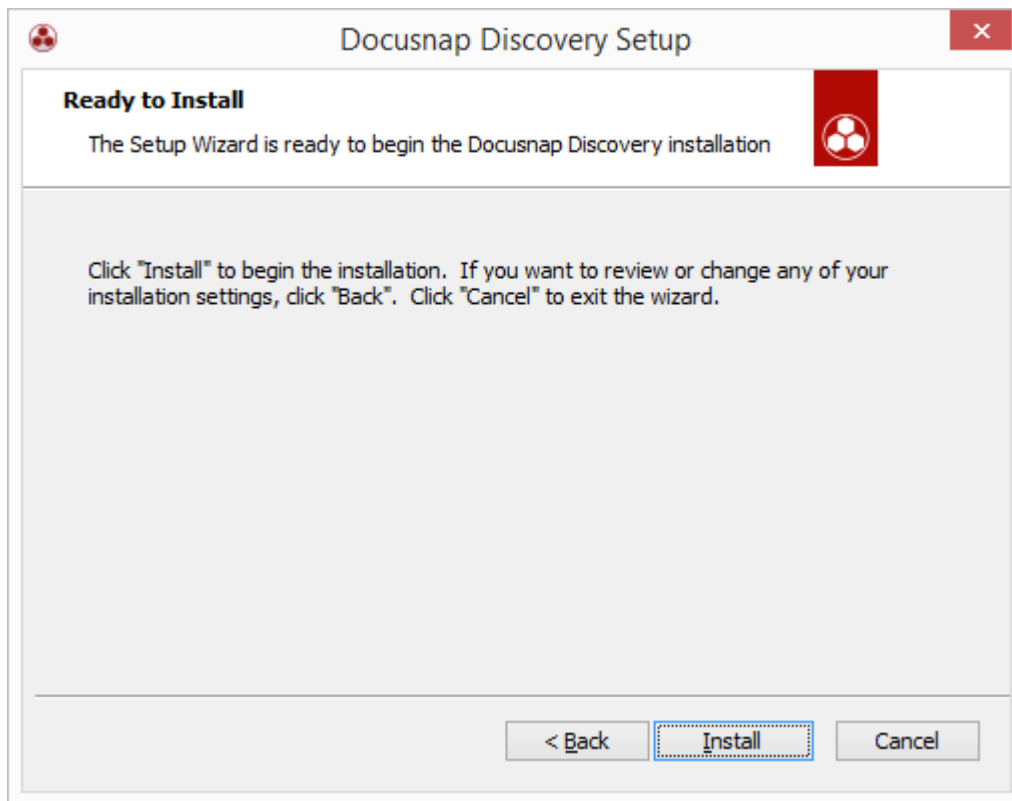




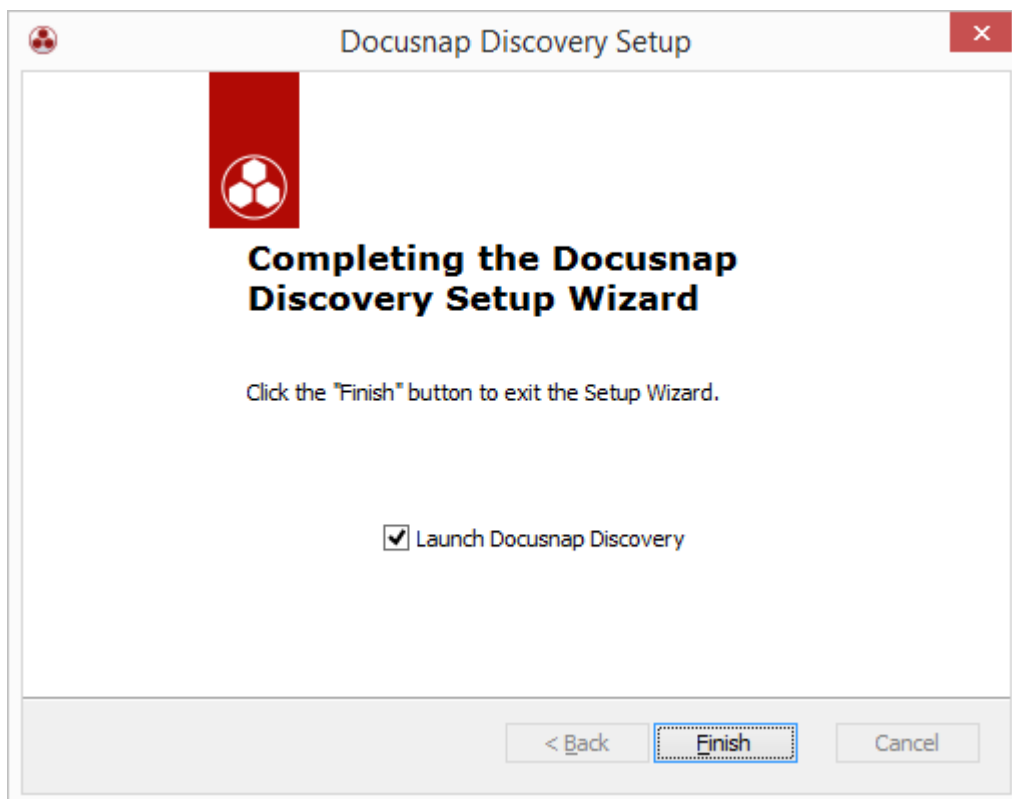
In the next step may be decided where Docusnap Discovery Services will be installed.



By clicking on the *Install* button installation starts.



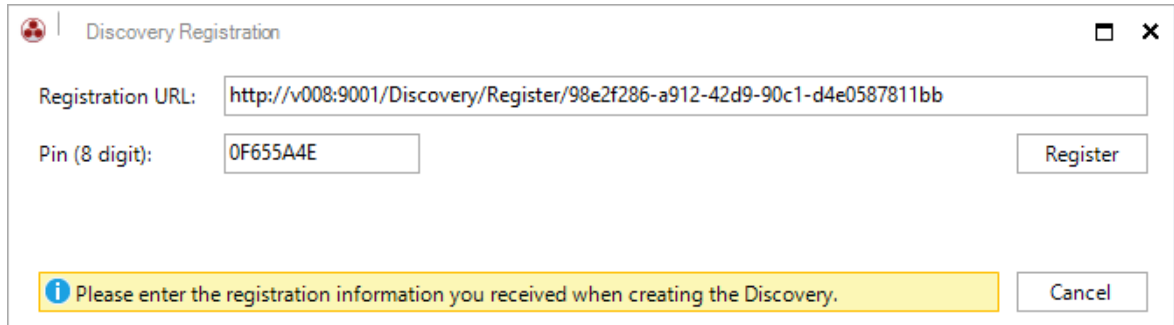
By clicking on the *Finish* button, the installation is completed.



3.4 Configure Connection

After installation Docusnap Discovery Service Configuration dialog opens.

If a package for the installation is created when creating the Discovery Service in Docusnap and the installation of the Discovery Service uses this package, then the registration URL and the pin are already filled. In the RegistrationData.txt the required information (URL and pin) are stored.



The screenshot shows a dialog box titled "Discovery Registration". It contains two input fields: "Registration URL:" with the value "http://v008:9001/Discovery/Register/98e2f286-a912-42d9-90c1-d4e0587811bb" and "Pin (8 digit):" with the value "0F655A4E". There are two buttons: "Register" and "Cancel". A yellow message bar at the bottom states: "Please enter the registration information you received when creating the Discovery."

After entering the required information for URL and PIN the Docusnap Discovery Service can be registered on the central Docusnap Server. By clicking the button *Register*, the registration is performed.

Once registration has been successfully completed, this Discovery Service can be used by the central Docusnap installation.

General

The URL and other information of the Discovery Service are displayed in the *Server Connection* group. Under connection test can be checked in advance whether a link between the Docusnap Discovery Service and the central Docusnap installation is possible.

The service can be started and stopped under *Discovery Windows Service*.

Docusnap Discovery Service Configuration - DDS

GENERAL SETTINGS Log Register

Server Connection

URL:

Transport: Timeout:

Discovery Windows Service

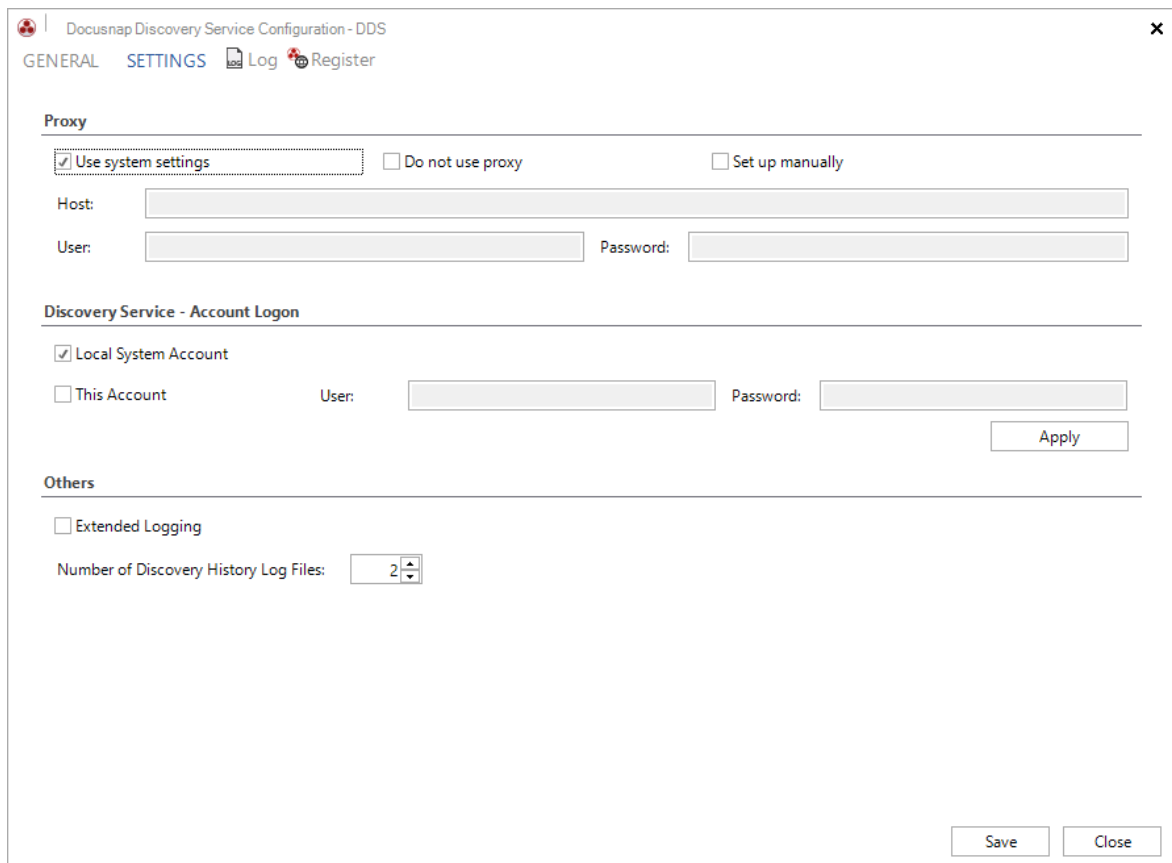
☒ Discover Service running

Settings

Under *Proxy* you can define the settings for the [proxy](#) that are needed for the inventory.

It is also possible to specify a user to be used for the execution of the service when logging on to the account.

Selecting the *Extended Logging* checkbox enables logging for the Discovery Service.



The screenshot shows the 'Docusnap Discovery Service Configuration - DDS' window with the 'SETTINGS' tab selected. The window has a title bar with a close button (X) and a menu bar with 'GENERAL', 'SETTINGS', 'Log', and 'Register'. The 'SETTINGS' tab is divided into three sections: 'Proxy', 'Discovery Service - Account Logon', and 'Others'. In the 'Proxy' section, 'Use system settings' is checked, and there are fields for 'Host', 'User', and 'Password'. In the 'Discovery Service - Account Logon' section, 'Local System Account' is checked, and there are fields for 'User' and 'Password', along with an 'Apply' button. In the 'Others' section, 'Extended Logging' is unchecked, and there is a 'Number of Discovery History Log Files' field set to 2. At the bottom right, there are 'Save' and 'Close' buttons.

Docusnap Discovery Service Configuration - DDS

GENERAL SETTINGS Log Register

Proxy

☒ Use system settings ☐ Do not use proxy ☐ Set up manually

Host:

User: Password:

Discovery Service - Account Logon

☒ Local System Account

☐ This Account User: Password:

Apply

Others

☐ Extended Logging

Number of Discovery History Log Files:

Save Close

Log

By clicking on the *Log* button, the logging file can be opened and saved. This file can then be sent to support.

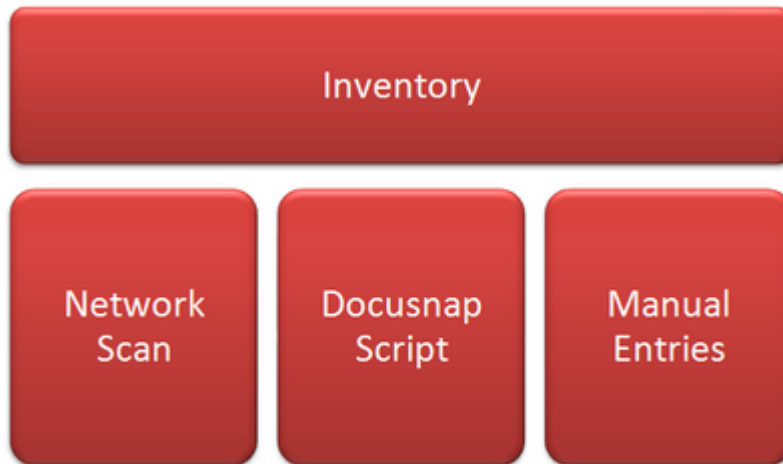
Register

Clicking the Register button opens the Discovery Registration dialog. In this dialog a new Discovery Service can be registered by entering the URL and Pin created in Docusnap.

Part

IV

4 Inventory



[Network Inventory](#)

The procedures for the automated inventory process are covered in the Network Inventory Process section.

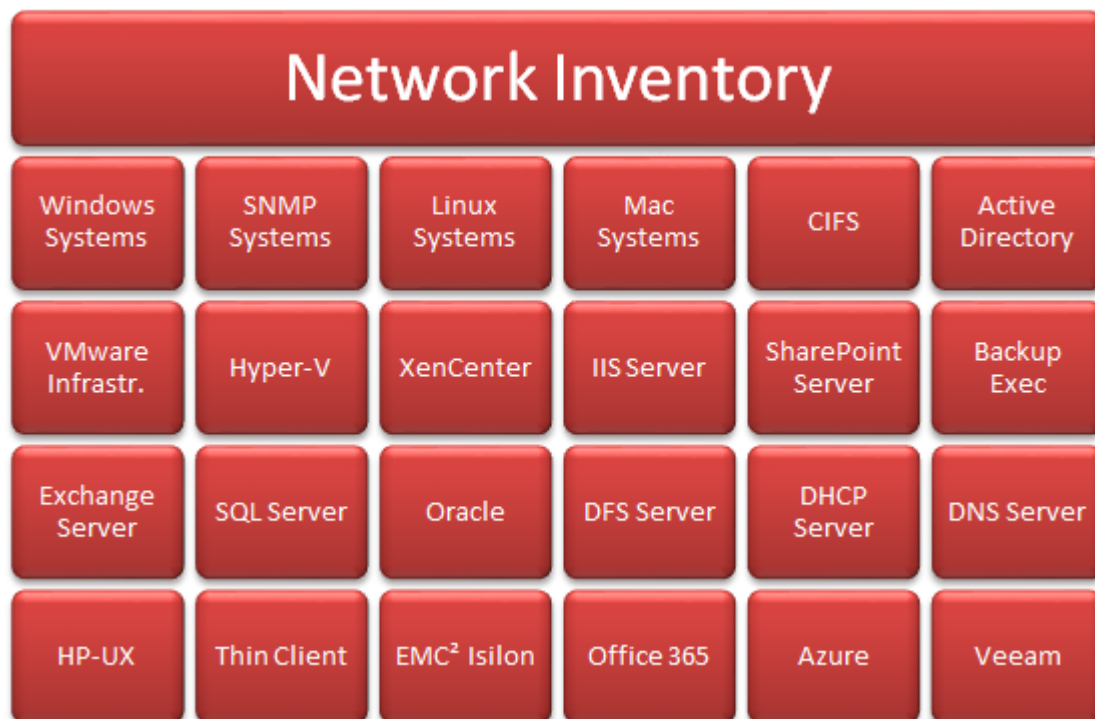
[Docusnap Script](#)

Using the Docusnap Script, you can scan a Windows or Linux system and save the collected information to an XML file that can be imported subsequently into Docusnap.

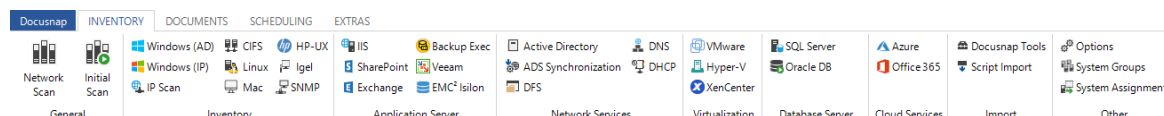
[Manually Create Systems](#)

If you wish to include systems that cannot be scanned by the automated inventory process or by the Docusnap Script, you can enter the required information manually.

4.1 Network Inventory



When you navigate to the *Inventory* tab on the ribbon, the buttons used to create an inventory of the IT environment become accessible.



Inventorying the Network

Click the *Network Scan* button to open the inventory wizard. From this wizard, you can access a number of separate wizards which will be described below.

In addition to the *Network Scan* wizard, which already contains several modules by default, custom wizards can be configured to combine several modules in one wizard. The customized wizards can be configured in Docusnap Management.

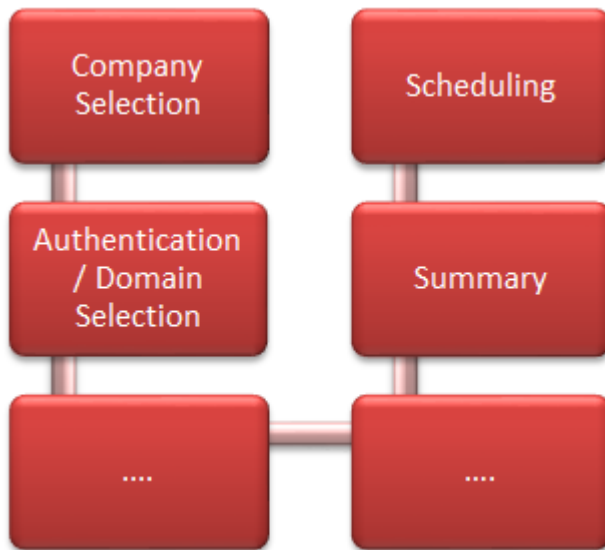
Initial Scan

The *Initial Scan* inventories basic information about the Active Directory, the Windows systems, DHCP, DNS, and Exchange server and SNMP devices.

4.1.1 Basic Steps

For the tasks involved in an inventory scan, Docusnap provides a wizard-based user interface that will be referred to as *Wizard* in this documentation. The Docusnap inventory wizard consists of several steps, which are combined differently

depending on which system type (Windows systems, VMware infrastructure, etc.) is to be scanned. The following figure illustrates the basic steps each wizard includes.



4.1.1.1 Company Selection

When you start the Docusnap inventory wizard, the first step is to select a company to which the results of the inventory scan will be assigned. If you purchased a Docusnap multi-license (capable of supporting multiple companies), you can create a new company or select an existing company in this step.

Inventory

1 2 3 4 5

Company Selection Authentication Windows Systems (AD) Summary Scheduling

Please select a company or create a new one: ☒ Select Company ☐ Create new Company

Docusnap

Next Cancel

When you click the *Create New Company* radio button, a data entry screen opens where you can create the desired new company. After you have entered the name in the text field, you can accept your entry by clicking the *Save* button or discard your changes by clicking the *Cancel* button.

4.1.1.2 Authentication

Discovery Service

The inventory in Docusnap X is performed by the Discovery Service. Each Docusnap installation has a client Discovery used to start the inventory process like in Docusnap 6.3. Once the Docusnap server is configured for the connected database, a server Discovery is provided. This one is chosen when an inventory should be scheduled and executed at a later date automated. When the inventory should be performed with a Discovery Service, which was installed at another site, the respective Discovery Service must be chosen from the list.

Authentication

Depending on the systems for which the inventory process will be performed, the second step in the wizard is to either specify your credentials or a domain.

The term "domain" will be used in Docusnap both in connection with logging on to an Active Directory and for the logical organization in the *Inventory* tree view. This means that, if no Active Directory Domain Service is available, a domain name must nonetheless be entered for purposes of logical organization in the Docusnap tree view.

For an *Active Directory* domain authentication, enter the domain name in the *Domain* field. If it is necessary to enter your username and password, depends on the following:

- If you are logged on to the Docusnap computer as a domain administrator, you can use the integrated Windows authentication for the inventory process. This means that you need not specify a user name or password.

- If you are logged on to the Docusnap computer as a user other than a domain administrator, you need to specify the corresponding credentials.



If you need to enter your credentials for authentication, the NetBIOS name, followed by a backslash (\), must precede the user name. For example, the NetBIOS name of the domain named docusnap.intern is DOCUSNAP. Therefore, you would have to enter the following user name: `DOCUSNAP\<UserName>`

Alternatively the form `<user name>@Docusnap` can be used.

Click the *Check Credentials* button to log on to the Active Directory. If the login was successful, you can proceed with the next step.

Inventory

1 Company Selection 2 **Authentication** 3 Windows Systems (AD) 4 Active Directory ... Steps 5-8

Authentication

Refresh Edit Discovery Service Server Connection

	DISCOVERY SERVICE	HOST NAME	PLUGIN VERSION
<input type="checkbox"/>	Client-V008	V008	10.0.1189.1
<input type="checkbox"/>	DDS	V008	10.0.1189.1
<input checked="" type="checkbox"/>	Server-V008	V008	10.0.1189.1

Domain: dsra.local

User Name: dsra\adm_docusnap

Password: *****

☒ Save User Name and Password

Check Credentials

Back Next Cancel

Authentication successful

In the dialog [Options - Inventory](#) it can be defined, that a dedicated domain controller is used. If this option is enabled, you can select the domain controller, which should be used to retrieve the systems from the Active Directory.

Selecting a Domain

For some modules, a logical domain has to be selected or created so the data can be displayed in the tree hierarchy.

When you click the *Create New Domain* radio button, a data entry screen opens where you can create the desired new logical domain for Docusnap. After you have entered the name in the text field, you can apply your entry by clicking the *Save* button or discard your changes by clicking the *Cancel* button.

Inventory

1

2

3

4

...

Company Selection

Domain Selection

SNMP Systems

SNMP v3 Systems

Steps 5-6

Please select a domain or create a new one:

Select Domain

Create new Domain

Refresh

Edit Discovery Service

Server Connection

	DISCOVERY SERVICE	HOST NAME	PLUGIN VERSION	
<input type="checkbox"/>	Client-V008	V008	10.0.1189.1	
<input type="checkbox"/>	DDS	V008	10.0.1189.1	
<input checked="" type="checkbox"/>	Server-V008	V008	10.0.1189.1	

Domain: dsra.local

Domain: docusnap.intern

Save

Cancel

Back

Next

Cancel

4.1.1.3 Summary Page

In the step *Summary* both the modules to be inventoried as well as detailed information about the individual modules will be listed.



Inventory

Steps 1-4 5 6 **7** 8

SNMP Systems Exchange Server **Summary** Scheduling

Summary

- Modules selected for inventory
 - Windows
 - Active Directory
 - SNMP
 - Exchange
- Detailed Information
 - Windows Systems
 - DSBK01 Windows Server 2012 R2 Standard
 - DSDC01 Windows Server 2012 R2 Standard
 - DSEX01 Windows Server 2012 R2 Standard
 - DSFS01 Windows Server 2008 R2 Enterprise
 - DSFS02 Windows Server 2012 R2 Standard
 - DSSP01 Windows Server 2008 R2 Enterprise
 - DSSP02 Windows Server 2008 R2 Enterprise
 - DSWS01 Windows 8.1 Enterprise
 - SNMP IP Segments
 - 192.168.100.1 - 192.168.103.254
 - Exchange

Back Next Cancel

4.1.1.4 Scheduling

The *Scheduling* step is available in all wizards.

If the *Schedule Inventory* checkbox is not selected, the inventory can be initiated by clicking the *Start* button.



If the inventory is executed automated, the Docusnap Server or one of Discovery Services is used. For this reason, the scheduling is disabled, when the Client Discovery is selected.

To schedule the execution the tasks of the wizard at a later point of time, check the checkbox *Schedule Inventory*.

Assign a unique name to the job in the *Name* field so that it can be identified by its name in the scheduling dialogs. The field to the right is used to summarize the selected configuration.

If the server or discovery service is in a different time zone than the Docusnap installation, the [option](#) to use time zones can be enabled. During scheduling, you can define whether the specified time is from the time zone of the server or the discovery service, or whether it is the UTC time. The setting in the *Time Zone of Execution* field defines which time is used.

Click the *Finish* button to save the configuration of the job and close the wizard. The Docusnap Server will execute the inventory at the scheduled time automatically.

Inventory

...

5

6

7

8

Steps 1-4

SNMP Systems

Exchange Server

Summary

Scheduling

☒ Schedule Inventory

Name:

Network Scan

Schedule Type:

Recurring

Time Zone of Execution:

DDS Time Zone

Frequency

Interval:

Weekly

Recurring every:

1

week(s) on:

☒ Monday
☐ Tuesday
☐ Wednesday
☐ Thursday
☐ Friday
☐ Saturday
☐ Sunday

Frequency per day

☒ Once at:

09:00:00

☐ Every:

1

Hour(s)

Start:

00:00:00

End:

23:59:59

Duration

Start Date:

01/12/2017

☒ No End Date
☐ End Date:

30/11/2017


Every week on Monday at 09:00:00. Schedule will be used from 01.12.2017.

Back

Finish

Cancel

4.1.1.5 Inventory Status

During the execution of the inventory the wizard is closed. Thus, Docusnap can continue to be used while the inventory is being performed in the background. By clicking on the button  in the lower right area, the inventory status can be opened. This dialog displays the progress of the inventory. By clicking on the *Cancel* button, the inventory can be aborted. Clicking on the *Minimize* button closes the dialog again.


The *Status* column displays the current status of the inventory. The *Information* column contains, for example, information about why an inventory failed.

Inventory Status					
STATUS					
	NAME	TYPE	DISCOVERY SERVICE	STATUS	INFORMATION
Completed					
	SMSQ0004	Windows (AD)	Client-WKNE2001.intern.local	Completed	System not available (Ping)
	WMWS0772	Windows (AD)	Client-WKNE2001.intern.local	Completed	The RPC server is not available
	SMDC0003	Windows (AD)	Client-WKNE2001.intern.local	Completed	Inventory completed
	SMSQ0001	Windows (AD)	Client-WKNE2001.intern.local	Completed	Inventory completed
	SMDC0002	Windows (AD)	Client-WKNE2001.intern.local	Completed	Inventory completed
	SMDC0001	Windows (AD)	Client-WKNE2001.intern.local	Completed	Inventory completed
	WMWS0333	Windows (AD)	Client-WKNE2001.intern.local	Completed	Inventory completed
	SMEX0003	Windows (AD)	Client-WKNE2001.intern.local	Completed	Inventory completed
Data storing in progress					
	docusnap.intern	ActiveDirectory	Client-WKNE2001.intern.local	Data storing in progr...	Scanned successfully
Inventory in progress					
	192.168.100.5	SNMP	Client-WKNE2001.intern.local	Inventory in progress	
	192.168.100.12	SNMP	Client-WKNE2001.intern.local	Inventory in progress	
	192.168.100.22	SNMP	Client-WKNE2001.intern.local	Inventory in progress	

All entries are grouped by status. If desired, additional columns can also be added to the grouping using drag & drop.

Inventory Status					
STATUS					
INFORMATION					
	NAME	TYPE	DISCOVERY SERVICE	STATUS	INFORMATION
Completed					
Inventory completed					
	SMDC0001	Windows (AD)	Client-WKNE2001.intern.local	Completed	Inventory completed
	SMDC0002	Windows (AD)	Client-WKNE2001.intern.local	Completed	Inventory completed
	SMDC0003	Windows (AD)	Client-WKNE2001.intern.local	Completed	Inventory completed
	SMEX0003	Windows (AD)	Client-WKNE2001.intern.local	Completed	Inventory completed
	SMSQ0001	Windows (AD)	Client-WKNE2001.intern.local	Completed	Inventory completed
	WMWS0333	Windows (AD)	Client-WKNE2001.intern.local	Completed	Inventory completed
	docusnap.intern	ActiveDirectory	Client-WKNE2001.intern.local	Completed	Inventory completed
System not available (Ping)					
	SMSQ0004	Windows (AD)	Client-WKNE2001.intern.local	Completed	System not available (Ping)
The RPC server is not available					
	WMWS0772	Windows (AD)	Client-WKNE2001.intern.local	Completed	The RPC server is not available
Inventory in progress					
No Message					
	192.168.100.5	SNMP	Client-WKNE2001.intern.local	Inventory in progress	
	192.168.100.12	SNMP	Client-WKNE2001.intern.local	Inventory in progress	
	192.168.100.22	SNMP	Client-WKNE2001.intern.local	Inventory in progress	
	192.168.100.20	SNMP	Client-WKNE2001.intern.local	Inventory in progress	
	192.168.100.28	SNMP	Client-WKNE2001.intern.local	Inventory in progress	




Clicking on the  button lists all interactively executed inventories of the current system, the Docusnap Server and the Discovery Services, which are connected to the same database. If the user management is active, only inventories of companies to which the logged in user is authorized are listed.

4.1.1.6 Summary

After the inventory is completed, a status message is displayed.



Click on the message or on the  button to display the summary.

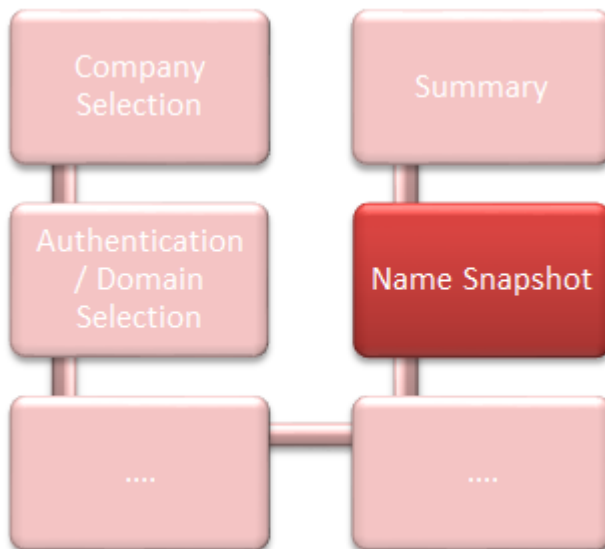
In the *Information* column the error messages and error cause details will be shown for the aborted and incomplete steps.

Summary					
TYPE					
	NAME	TYPE	DISCOVERY SERVICE	STATUS	INFORMATION
ActiveDirectory					
	docusnap.intern	ActiveDirectory	Client-WKNE2001.intern.local	✓	Scanned successfully
Exchange					
	docusnap.intern	Exchange	Client-WKNE2001.intern.local	✓	successful
ExchangeSRV					
	SCEX0001.rd.docusna...	ExchangeSRV	Client-WKNE2001.intern.local	✓	Scanned successfully
	STEX0001.bulk.docus...	ExchangeSRV	Client-WKNE2001.intern.local	✓	Scanned successfully
	SMEX0003.docusnap....	ExchangeSRV	Client-WKNE2001.intern.local	✓	Scanned successfully
SNMP					
Windows (AD)					
	SMSQ0004	Windows (AD)	Client-WKNE2001.intern.local	✗	System not available (Ping)
	WMWS0772	Windows (AD)	Client-WKNE2001.intern.local	✗	The RPC server is not available
	SMDC0003	Windows (AD)	Client-WKNE2001.intern.local	✓	Scanned successfully
	SMSQ0001	Windows (AD)	Client-WKNE2001.intern.local	✓	Scanned successfully
	SMDC0001	Windows (AD)	Client-WKNE2001.intern.local	✓	Scanned successfully
	SMDC0002	Windows (AD)	Client-WKNE2001.intern.local	✓	Scanned successfully
	WMWS0333	Windows (AD)	Client-WKNE2001.intern.local	✓	Scanned successfully
	SMEX0003	Windows (AD)	Client-WKNE2001.intern.local	✓	Scanned successfully



4.1.1.7 Optional: Naming Snapshots

As already described in the [Basics - Docusnap Wizards](#) section, Docusnap wizards can be extended as needed. To enable the *Name Snapshot* step, open the *General* page of the [Options - Inventory](#) dialog.



In the *Name Snapshot* step, you can assign a name to an inventory scan. *Snapshots* are primarily used to summarize inventory scans so that you are able to identify them later. So you can, for example, select a specific *snapshot* when importing data to the database, or you can delete the entire *snapshot* with all of its data.

After enabling the *Name Snapshot* checkbox, you can define a specific name for the current inventory scan. If you enable the *Exclude snapshot from automatic deletion* checkbox, the data associated with the current snapshot will not be deleted when the maximum number of archive versions (specified in the [Options](#) dialog) is reached.

If you did not enable the *Name Snapshot* checkbox, the name of the snapshot will be *Inventory from*, along with the date and time of the inventory scan.

The screenshot shows a window titled 'Inventory' with a progress bar at the top. The progress bar has five steps: 'Steps 1-5', 'Exchange Server', 'Name Snapshot' (which is the current step and highlighted with a grey circle), 'Summary', and 'Scheduling'. Below the progress bar, there is a section titled 'Name Snapshot' with a checked checkbox. Under this section, there is a text input field labeled 'Snapshot Name:' containing the text 'Master Network Scan'. Below the input field, there is another checked checkbox labeled 'Exclude snapshot from automatic deletion'. At the bottom right of the window, there are three buttons: 'Back', 'Next', and 'Cancel'.

4.1.2 Initial Scan

With the first start of Docusnap the *Initial Scan* opens to inventory basic data. If the initial scan should not be executed, it can be closed by clicking on the *Cancel* button.

In the ribbon *Inventory* the Initial Scan can be opened again.

In the step *Authentication* the company has to be selected in which the data should be stored. For an *Active Directory* domain authentication, enter the domain name in the *Domain* field. If it is necessary to enter your username and password, depends on the following:

- If you are logged on to the Docusnap computer as a domain administrator, you can use the integrated Windows authentication for the inventory process. This means that you need not specify a user name or password.
- If you are logged on to the Docusnap computer as a user other than a domain administrator, you need to specify the corresponding credentials.



If you need to enter your credentials for authentication, the NetBIOS name, followed by a backslash (\), must precede the user name. For example, the NetBIOS name of the domain named docusnap.intern is DOCUSNAP. Therefore, you would have to enter the following user

name: `DOCUSNAP\<UserName>` Alternatively the form `<user name>@Docusnap` can be used.

To perform the *Initial Scan*, a Discovery Service must be selected.

Click the *Next* button to log on to the Active Directory. If the login was successful, you can proceed with the next step.

The screenshot shows a window titled "INVENTORY" with a progress bar at the top indicating four steps: 1. Authentication (active), 2. Summary, 3. Inventory, and 4. Report. Below the progress bar, the "Authentication" section contains the following fields:

- Company: Docusnap AG (dropdown)
- Domain: dsra.local (dropdown)
- User Name: dsra\administrator (text box)
- Password: ***** (password field with a red 'X' icon)
- Discovery Service: ☒ Client-Discovery (dropdown with a refresh icon)
- ☒ Save User Name and Password

On the right side, a note states: "If credentials are used for authentication, the user name must be prefixed by the NetBIOS name followed by a '\'. For example, the NetBIOS name of the domain docusnap.intern is DOCUSNAP. Thus enter Docusnap\<user name> in the User Name text box. Alternatively the form <name>@docusnap.intern can be used."

At the bottom right, there are "Next" and "Cancel" buttons.

In step Summary all modules are listed, which can be inventoried with the initial scan. With the associated checkbox can be determined which data are to be inventoried. By clicking on Start the inventory process is started.

The large number of network requests from the SNMP scans may lead to warnings when using safety and monitor solutions.

INVENTORY

1

2

3

4

Authentication

Summary

Inventory

Report

Summary

Scan Modul
<input checked="" type="checkbox"/> <input type="checkbox"/> Active Directory
<input checked="" type="checkbox"/> <input type="checkbox"/> Windows Systems (8 Systems)
<input type="checkbox"/> <input checked="" type="checkbox"/> DHCP
<input checked="" type="checkbox"/> <input type="checkbox"/> DSDC01.dsra.local
<input type="checkbox"/> <input checked="" type="checkbox"/> DNS
<input checked="" type="checkbox"/> <input type="checkbox"/> dsdcc01.dsra.local
<input type="checkbox"/> <input checked="" type="checkbox"/> Exchange
<input checked="" type="checkbox"/> <input type="checkbox"/> DSEX01
<input checked="" type="checkbox"/> <input type="checkbox"/> SNMP IP Segments

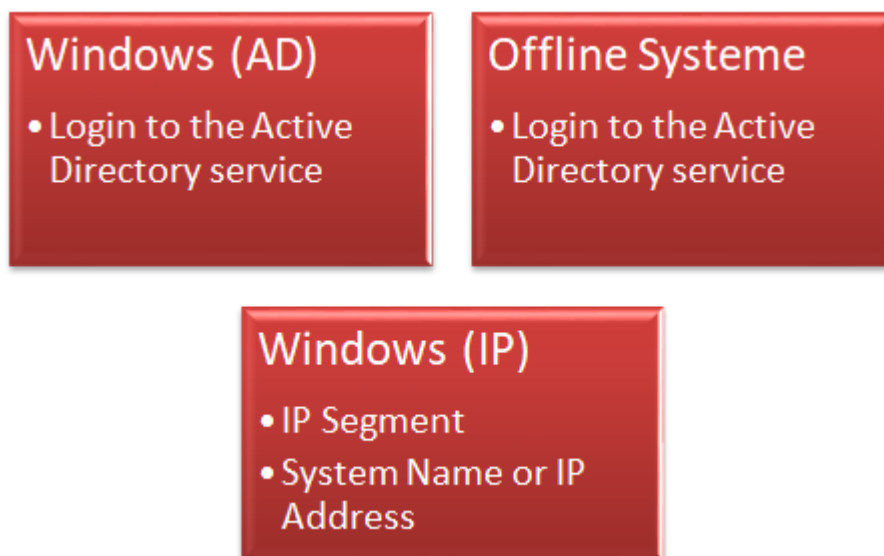
Note: The large number of network requests from the SNMP scans may lead to warnings whe...

Start

Cancel

4.1.3 Windows

For the automated scanning of *Windows systems*, a variety of methods can be used in Docusnap. While the core directory service, i.e. the *Active Directory Service* must be accessible when scanning *Windows systems* and *offline systems*, you can use the *IP Segment* inventory process to scan an IP range or a single system.



These are the differences:

Windows (AD)

When you click either the *Network Scan* or the *Windows (AD)* button, Docusnap will search the Active Directory for active computer accounts. The actual inventory process for individual systems will be based on the results of this search.



If the Active Directory system has a larger number of active computer accounts than have been licensed in Docusnap, a corresponding error message will be displayed in the *Authentication* step.

Windows (IP)

Click the *Windows (IP)* button to scan Windows systems which are not part of the Active Directory, for example, workgroup computers. Based on the specified IP ranges, IP addresses or computer names, Docusnap attempts to identify Windows systems in the network and to inventory them in subsequent steps.

Offline Systems

Docusnap will assign the *Offline* status to systems that were previously unreachable with the Windows Inventory but are in the Active Directory. These systems can be inventoried explicitly in course of another *Windows Inventory*.

4.1.3.1 Windows (AD)

To start the wizard for inventorying your Windows systems, click the *Network Scan* or *Windows (AD)* button on the Inventory ribbon. The *Windows Systems (AD)* step will be displayed after you have selected a company and entered your credentials (see: [Basic Steps](#)).

Inventory

Inventory

1

2

3

4

5

Company Selection

Authentication

Windows Systems (AD)

Summary

Scheduling

☒ Inventory Windows Systems, or
 ☐ Inventory Offline Systems

Start Search at:

☐ Update selected systems: Search AD again for additional systems if inventory is scheduled.

☐ Exclude systems, which can't be assigned to a Discovery, from the report

☒ Include connection data for communication map




<input checked="" type="checkbox"/>	NAME	TYPE	LAST INVENTORY	OPERATING SYSTEM	PASSWORD AGE (Days)
<input checked="" type="checkbox"/>	DSDC01	Domain Controller	13/03/2018 11:41:24	Windows Server 2012 R2 Standard	
<input checked="" type="checkbox"/>	DSDC02	Domain Controller		Windows Server 2012 R2 Standard	
<input checked="" type="checkbox"/>	DSFS02	Server	13/03/2018 11:41:24	Windows Server 2012 R2 Standard	
<input checked="" type="checkbox"/>	DSFS01	Server	13/03/2018 11:41:24	Windows Server 2008 R2 Enterprise	
<input checked="" type="checkbox"/>	XP-OFFLINE	Workstation	13/03/2018 11:42:11	Windows XP Professional	
<input checked="" type="checkbox"/>	DSBK02	Server	13/03/2018 11:42:16	Windows Server 2016 Datacenter	43
<input checked="" type="checkbox"/>	DSHY01-N2	Server		Windows Server 2016 Datacenter	30
<input checked="" type="checkbox"/>	DSHY01-N1	Server		Windows Server 2016 Datacenter	29
<input checked="" type="checkbox"/>	DSWS02	Workstation		Windows 10 Enterprise	61
<input checked="" type="checkbox"/>	DSHY01	Server		Windows Server 2016 Datacenter	17
<input checked="" type="checkbox"/>	DSWS03	Workstation	13/03/2018 11:43:19	Windows 10 Enterprise	21
<input checked="" type="checkbox"/>	DSSP03	Server	13/03/2018 11:43:11	Windows Server 2016 Datacenter	7

☒ Systems found: 20

DocuSnap will select the systems to be scanned based on the active computer accounts available in the Active Directory. Using the *Start Search at* filter criterion, you can restrict the search to a specific organizational unit. Click the *Select OU* button to open a dialog where you can select the desired organizational unit. If you do not specify a filter criterion, DocuSnap will search the entire Active Directory for active computer accounts.

Start the search by clicking the *Start Search* button. During the search, all user interface controls except the *Cancel* button will be disabled. After the search has completed, the identified Windows systems will be displayed in the list.

There are several ways to select the systems to be inventoried. To select or deselect a certain system, you can use the checkbox next to its name. By default, all devices are selected. By using the checkbox in the header row all hosts can be selected or deselected simultaneously. By right-clicking on the table the buttons *Select All* and *Deselect all* can be used in the context menu.

In the first line filter criteria can be defined and in the Type column you can use the icons  (domain controllers),  (memberservers) and  (workstations) to select the respective systems.



Inventory

1 2 3

Company Selection Authentication Windows Systems (AD)

☒ Inventory Windows Systems, or ☐ Inventory Offline Systems

Start Search at:

☐ Update selected systems: Search AD again for additional systems if inventory is scheduled.

☐ Exclude systems, which can't be assigned to a Discovery, from the report

☒ Include connection data for communication map

<input checked="" type="checkbox"/>	NAME	TYPE	LAST INVENTORY	OPERATING SYSTEM
<input checked="" type="checkbox"/>	DSDC01	Domain Controller	13/03/2018 11:41:24	Windows Server 2012 R
<input checked="" type="checkbox"/>	DSDC02	Server	13/03/2018 11:41:24	Windows Server 2012 R
<input checked="" type="checkbox"/>	DSFS02	Workstation	13/03/2018 11:41:24	Windows Server 2012 R
<input checked="" type="checkbox"/>	DSFS01	Server	13/03/2018 11:41:24	Windows Server 2008 R
<input checked="" type="checkbox"/>	DSBK02	Server	13/03/2018 11:42:16	Windows Server 2016 D
<input checked="" type="checkbox"/>	DSHY01-N2	Server		Windows Server 2016 D
<input checked="" type="checkbox"/>	DSHY01-N1	Server		Windows Server 2016 D
<input checked="" type="checkbox"/>	DSHY01	Server		Windows Server 2016 D



Besides the operating system information and the system type, the *Systems Found* list also includes a column showing the password age. The password age indicates how many days ago the current computer account last received a new access token from the domain controller. By default, this token is renewed every 30 days.

- **Update selected systems:** To consider systems that have not yet existed during scheduling of the inventory (Docusnap Server or Docusnap Discovery Service), the checkbox *Update selected systems* can be activated. Thereby, the Active Directory is searched for other systems and they are also inventoried. If systems are excluded from the list, they will still not be inventoried.
- **Exclude systems, which can't be assigned to a Discovery, from the report:** If the network is heavily segmented by using discovery services with different IP ranges, some systems will be found while browsing the Active Directory, but will not be scanned due to the specified IP range. These will then be listed in the final report. Checking the this checkbox causes the systems excluded because of IP Ranges to not be listed as failing in the final report, only the systems within the specified IP ranges will be considered. This option is available for Windows inventory and for inventorying offline systems.
- **Include [connection data](#) for communication map:** If the connection data is not needed, it is possible to exclude it during inventory, thereby speeding up the inventory process.

Use of filters with scheduled inventory

If the OU filter was used to limit the scan to systems of specific organizational units, only those systems of these OUs are considered for the automated inventory. If computer accounts have been added to one of the selected OUs between the scheduling and execution of this job, they are also inventoried during the inventory process.

You can also specify filter criteria. These are entered in the first line, above the list of systems. For example, you can filter on system types or on the names of the systems. When the inventory is scheduled, the filter is applied again and all systems from the AD to which the filter matches are inventoried.

Offline System

Alternative to all Windows systems, you can choose to only inventory Windows systems that could not be inventoried during previous inventory scans. Click the *Inventory Offline Systems* checkbox to show only offline systems and the inventory can be started.

When the inventory of offline systems is scheduled, re-execution will only consider those systems that could not be successfully inventoried yet, either by this job or any other inventory process.

- *Consider all not yet inventoried systems from the AD in addition to the offline systems if inventory is scheduled:* If this checkbox is activated, then the list of systems from the Active Directory will be updated during the inventory of the offline systems. Docusnap then inventories all systems of this list that have been marked offline in the database or which are not yet in the database. If certain systems have been excluded from the list, they will still not be inventoried.

Inventory

1

2

3

4

5

Company Selection

Authentication

Windows Systems (AD)

Summary

Scheduling

☐ Inventory Windows Systems, or
 ☒ Inventory Offline Systems

Start Search at:

☐ Consider all not yet inventoried systems from the AD in addition to the offline systems if inventory is scheduled.
 ☐ Exclude systems, which can't be assigned to a Discovery, from the report
 ☒ Include connection data for communication map

<input checked="" type="checkbox"/>	NAME	TYPE	LAST INVENTORY	OPERATING SYSTEM	PASSWORD AGE (DAYS)
<input checked="" type="checkbox"/>	DSWS02	Offline		Windows	229
<input checked="" type="checkbox"/>	VPC-HAM	Offline		Windows	126

i Systems found: 2

Determine BitLocker Status

During inventory of the volumes, it is checked whether the Microsoft BitLocker encryption is enabled. The prerequisite is that the executing user has local administrator permissions on the target system. The following BitLocker statuses can occur:

- Off: The volume has been scanned, BitLocker is not activated
- On: The volume has been scanned, BitLocker is active
- Unknown: The volume could not be scanned.
BitLocker encrypted partitions must be mounted by the operating system for access. If partitions are not integrated at the time of the inventory, the status *unknown* is displayed.

4.1.3.2 Windows (IP)

To start the wizard for inventorying certain IP segments of your Windows systems, click the *Windows (IP)* button on the *Inventory* ribbon. The *Windows Systems (IP)* step will be displayed after you have selected a company and a domain.

- If the firewall is alerted due to too many pings during the search of the IP segments, the number of parallel pings can be limited during the search.
- If a new search is started in a different IP range, the *Discard already found systems after new search* option can be used to define whether already existing systems should be deleted.
- When IP Segments inventory is scheduled and executed at a later time, the *Update selected systems* option can be used to determine whether only the selected systems are inventoried or the IP area is scanned again, and all found systems are taken into account for the inventory.
- Include [connection data](#) for communication map: If the connection data is not needed, it is possible to exclude it during inventory, thereby speeding up the inventory process.

There are two ways to identify individual systems:

Entering an IP Segment Manually

First, you need to enter the required information (*IP from*, *IP to*, *User*, *Password*) in the *Add IP Range* group and save this information. Then, click the *Start Search* button to identify the Windows systems in the specified segment(s). During this process, the individual IP addresses in the specified segments will be pinged. Each Windows system that replies successfully will be added to the *Found Systems* list.

If multiple IP ranges should be included in the inventory, they can also be imported from a CSV file by clicking the *Load List* button, instead of creating them individually using the buttons *New* and *Save*. In the CSV file, the values for *IP from*,

IP to, *user* and *password* must be listed in this exact order separated by ";". If a line doesn't match this format, this one will be omitted.

Entering Individual Computers Manually

In addition to scanning entire IP ranges for systems, you can also specify a single system. In the *Found Systems* group, click the *New* button and then enter either a system name or an IP address as well as the *User* and the *Password* for the system to be scanned subsequently.



If you wish to use the *IP Segments* inventory process to scan systems that are members of a domain, precede the user name with the NetBIOS name and a backslash (\). For example, the NetBIOS name of the domain named *intern.local* is *INTERN*. This means that you need to enter the following in the *User* field: *INTERN\<UserName>*.

If you would like to use the inventory process to scan individual systems or workgroup systems, "only" the user name (permissions of a local administrator) needs to be specified.

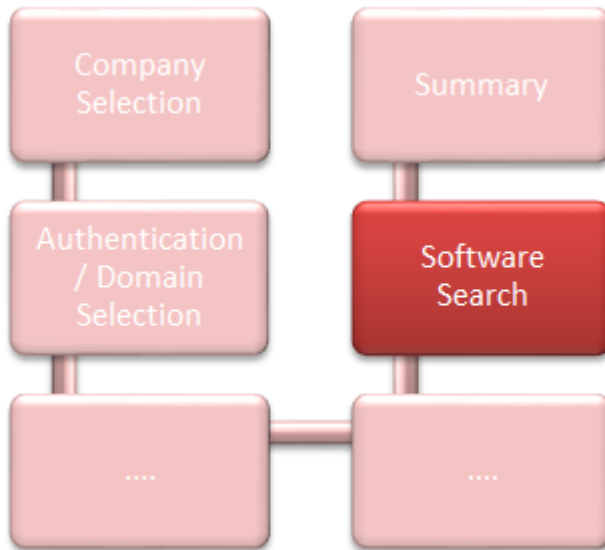
The actual inventory process is based on the systems listed in the *Found Systems* group. All systems selected there will be scanned.

4.1.3.3 Optional: Software Search

As already described in the [Basics - Wizards](#) section, Docusnap wizards can be extended as needed. The *Software Search* step can be enabled from the General page of the [Options - Inventory](#) dialog.

The Software Search step is available in the following wizards:

- Network Scan
- Windows (AD)
- Windows (IP)



The Software Search feature is an additional Docusnap feature for inventorying software products that could not be scanned by means of the Windows inventory process. If, for example, an application (.exe) has been saved to the file system from a distribution package without registering with the target system, Docusnap will not be able to find this product during the automated inventory scan. With the Software Search feature, Docusnap accesses the file system directly and attempts to find the defined software product in the course of the inventory scan.

Before you can use the Software Search feature, you need to define software products. To define the desired products, open the *Software Search* dialog in the Docusnap Management.

Inventory

Steps 1-2 Windows Systems **Software Search** Summary Scheduling

☒ Apply Software Search

<input checked="" type="checkbox"/>	NAME	VERSION
<input checked="" type="checkbox"/>	PuTTY	

Back Next Cancel

All registered software products will be listed as a result of the *Software Search* step. By enabling or disabling the checkboxes, you can determine which products Docusnap will be looking for when performing the automated scan.

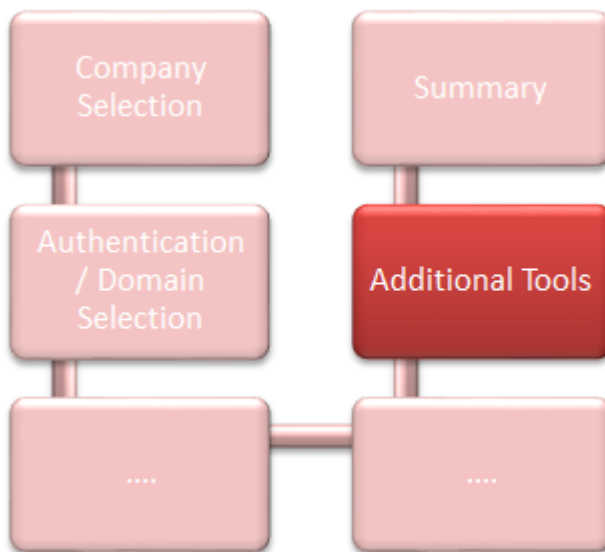
4.1.3.4 Optional: Additional Tools

As already described in the [Basics - Wizards](#) section, Docusnap wizards can be extended as needed. The Additional Tools step can be enabled from General page of the [Options - Inventory](#) dialog.

The Additional Tools step is available for the following wizards:

- Network Scan

- Windows (AD)
- Windows (IP)



The Additional tools feature can be used during the inventory process in order to scan for additional information about a Windows system. For example, the SystemInfo.exe application provides access to the operating system configuration for a local or remote computer. During the scanning process, Docusnap will start the selected utility and will add the results into the Docusnap database.

The screenshot shows the 'Inventory' application window. At the top, there is a progress bar with six steps: 1 (Steps 1-2), 2 (Windows Systems), 3 (Additional Tools), 4 (Summary), 5 (Scheduling), and 6 (Scheduling). Step 3 is currently selected and highlighted. Below the progress bar, there is a checkbox labeled 'Apply Additional Tools' which is checked. Underneath this checkbox is a table with the following data:

TOOL	DESCRIPTION	PARAMETER	TIMEOUT
<input checked="" type="checkbox"/> systeminfo.exe	Systeminfo	/S %hostname% /U %username%...	10000

At the bottom of the window, there are three buttons: 'Back', 'Next', and 'Cancel'.

All of the registered programs will be listed during the *Additional Tools* step. Checking or unchecking the checkbox will determine which products should be executed in the course of the automated scan process.



Additional tools are either executed on the system where the inventory process takes place or directly on the system. When specifying the additional tool, you can select whether the program should be run remotely.

If the additional tool is not run remotely, parameters can be specified to retrieve the data of the remote system.

Before an *additional tool* can be used, it must be defined. This can be done from the *Additional Tools* page in the Docusnap Management.

Output

After the inventory, the result of the executed additional tool is displayed under the heading *Additional Tools* in the tree for the respective system.

4.1.4 IP Scan

To start the wizard for inventorying IP Hosts, click the *IP Scan* button on the Inventory ribbon. The *IP Scan* step will be displayed after you have selected a company and a domain (see: [Basic Steps](#)).

During the IP scan, hosts are registered as IP hosts where a service is available during the inventory or a connection with an open port could be established.

Advanced IP scan: By selecting the Advanced IP scan check box Docusnap will use heuristic functions to determine additional information such as the operating system.



Installing the Npcap driver improves the quality in detecting the operating system during the IP scan. The driver can be installed during the Docusnap installation.

Inventory

1 Company Selection 2 Domain Selection 3 IP-Scan 4 Summary 5 Scheduling

☒ Inventory IP Segments

☒ Advanced IP Scan

Add IP Range

IP from: 172.31.1.1 IP to: 172.31.1.255

New Save Clear

<input checked="" type="checkbox"/>	IP FROM	IP TO
<input checked="" type="checkbox"/>	172.31.1.1	172.31.1.255
<input checked="" type="checkbox"/>	192.168.1.1	192.168.1.255

Load List

Back Next Cancel

In the *Add IP Range* section, enter the IP range to be used for the inventory.

If multiple IP ranges should be included in the inventory, they can also be imported from a CSV file by clicking the *Load List* button, instead of creating them individually using the buttons *New* and *Save*. In the CSV file the values for *IP from* and *IP to* must be listed in that order separated by ";".

4.1.5 SNMP Systems

To start the wizard for inventorying *SNMP systems*, click the *Network Scan* or *SNMP* button on the Inventory ribbon. The *SNMP* step will be displayed after you have selected a company and a domain (see: [Basic Steps](#)).

Scanning SNMP systems

For SNMP systems v1, v2 and v3 you can determine whether the data of the SNMP systems, the topology, or both should be inventoried. If not all the data is needed, the duration of the SNMP Inventory can be shortened by this selection.



By checking the checkbox *Reduce Inventory to Minimal Amount of Data*, the number of inventoried MIBs is reduced. Only the basic data is inventoried. Imported custom MIBs, are also ignored in this setting.

It depends on the devices and the number of custom MIBs, whether the inventory is taking less time with this settings.

If the firewall is alerted due to too many pings during the search of the IP range, the number of parallel pings can be limited during the search.

Inventory

1 Company Selection 2 Domain Selection **3 SNMP Systems** 4 SNMP v3 Systems 5 Steps 5-6

☒ **Inventory SNMP Systems**

☒ Inventory Device Data for Individual v1 and v2 Systems ☒ Inventory Topology Information for v1 and v2 Systems

☐ Reduce Inventory to Minimal Amount of Data

☒ Limit pings executed in parallel during the inventory to

IP Range

IP from:

IP to:

Community:

Timeout:

☐ Use v1 Preferably

<input checked="" type="checkbox"/>	IP FROM	IP TO	COMMUNITY	TIMEOUT
<input checked="" type="checkbox"/>	192.168.100.1	192.168.103.254	public	2500
<input checked="" type="checkbox"/>	172.31.1.1	172.31.1.254	public	2500

Note: The large number of network requests from the SNMP scans may lead to warnings whe... 2

Fill in the *IP from*, *IP to*, *Community* and *Timeout* fields to define the IP range to be scanned. After you have added the desired ranges to the IP Ranges list, you can specify for each range whether or not the inventory scan should be performed by enabling / disabling the checkbox next to it.

If multiple IP ranges should be included in the inventory, they can also be imported from a CSV file by clicking the *Load List* button, instead of creating them individually using the buttons *New* and *Save*. In the CSV file the values for IP from, IP to, Community and Timeout must be listed in that order separated by ";". If a line doesn't match this format, this one will be omitted.

In SNMP inventory, Docusnap attempts to obtain data from the SNMP device through the v2 protocol. If this request does not work, a new request is started over the v1 protocol. For some SNMP devices, a request via the v2 protocol may cause the device to be unavailable for a few seconds via SNMP. In this case, you can choose to run the v1 protocol first. If a device can not be inventoried correctly, it is possible that the required data can be successfully collected by activating the *Use v1 Preferably* checkbox.

Scanning Systems using the SNMP v3 Protocol

The next step refers to scanning systems that support SNMP v3. The main difference between SNMP V3 and SNMP v1 / v2 is that, for SNMP v3 systems, you can define authentication data.

Inventory

Steps 1-2 3 **4** 5 6

SNMP Systems **v3 Systems** Summary Scheduling

☒ Inventory SNMP v3 Systems

☒ Inventory Device Data for Individual v3 Systems ☒ Inventory Topology Information for v3 Systems

☐ Reduce Inventory to Minimal Amount of Data

v3 Systems

+ New Edit Delete Load List Load Already Known Systems from Database

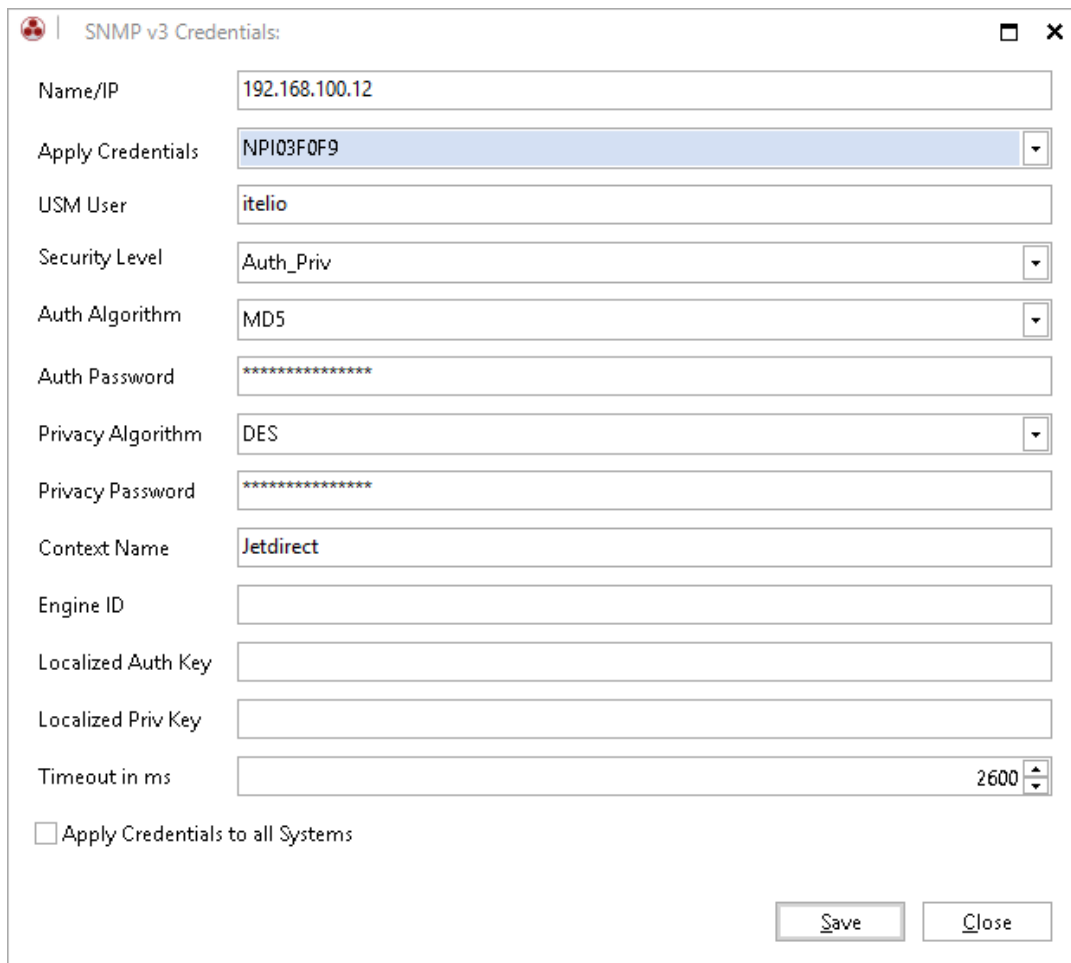
	NAME	
<input checked="" type="checkbox"/>	NP103F0F9	

Back Next Cancel

Clicking the New button opens the *SNMP v3 Credentials* dialog to specify the desired system that uses SNMP v3 protocol. The authentication details are entered in this dialog to ensure a successful inventory.

Click the *New* button to specify the name of the desired system that uses the SNMP v3 protocol. When you click the *Information* button, the *SNMP v3 Information* dialog opens where you can enter the authentication details required for a successful scan. If the same credentials have already been saved for another system, they can be loaded for the current system by selecting them in the *Apply Credentials* combo box instead of having to be reentered.

By checking the *Apply Credentials to all Systems* checkbox, the current credentials will be used for all specified systems and must not be redefined for each device.



The image shows a dialog box titled "SNMP v3 Credentials". It contains the following fields and controls:

- Name/IP:** Text field with value "192.168.100.12".
- Apply Credentials:** Dropdown menu with value "NPI03F0F9".
- USM User:** Text field with value "itelio".
- Security Level:** Dropdown menu with value "Auth_Priv".
- Auth Algorithm:** Dropdown menu with value "MD5".
- Auth Password:** Text field with masked value "*****".
- Privacy Algorithm:** Dropdown menu with value "DES".
- Privacy Password:** Text field with masked value "*****".
- Context Name:** Text field with value "Jetdirect".
- Engine ID:** Text field (empty).
- Localized Auth Key:** Text field (empty).
- Localized Priv Key:** Text field (empty).
- Timeout in ms:** Text field with value "2600" and a spinner control.
- Apply Credentials to all Systems:** A checkbox that is currently unchecked.
- Buttons:** "Save" and "Close" buttons at the bottom right.

Clicking the Edit button opens the *SNMP v3 Credentials* dialog for the selected system and the credentials can be edited.

If several v3 systems should be inventoried, they can also be imported from a CSV file. The file can be selected by clicking the Load List button. In the CSV file, the values must be specified in the following order separated by ";": System Name oder Address; USM User; Auth Algorithm; Auth Password; Privacy Algorithm; Privacy Password; Context Name; Timeout

If the other v3 systems have the same credentials, only the system name or the IP address must be specified. If new credentials are entered, they are used for all the corresponding subsequent entries.

Example for CSV file

```
ASWIT0001; Docusnap; SHA; secret; DES; secret; context; 2600
192.168.100.3
192.168.100.4
192.168.100.5
```

The credentials are saved in the wizard. The wizard saves the devices of the last inventory so that they will be available the next time the wizard is opened. By clicking the *Synchronize Credentials with Database* button SNMPv3 systems including their credentials can be reloaded. This eliminates the need to reenter

devices that have already been inventoried with another wizard or that have been deleted from the wizard.

After the desired systems have been added, you can use the checkbox next to each system to specify whether it is to be included in the inventory scan or not.



Generally, Docusnap uses the SNMP v1 and v2 protocols to identify SNMP systems. Each IP address in the specified range will be checked to determine if an SNMP system is involved. If the requested IP address responds to a ping and proves itself to be a valid SNMP system, the inventory process will be performed using the SNMP protocol.

SNMP systems that require the SNMP v3 protocol, but have been listed in the IP range list for the normal SNMP scan (i.e. using the v1 and v2 protocols), will not be considered when scanning the v1 and v2 systems.

By default, Docusnap inventories SNMP systems based on their system names. If a network includes multiple SNMP systems with the same system name, the results for all corresponding systems will be grouped under this system name. If you want to obtain individual results for each of these systems, you can specify to identify SNMP systems by their DNS names (on the *Inventory* page of the [Options - Inventory](#) dialog).

The large number of network requests from the SNMP scans may lead to warnings when using safety and monitor solutions.



4.1.6 Linux Systems

To start the wizard for inventorying Linux systems, click the *Linux* button on the Inventory ribbon. The *Linux Systems* step will be displayed after you have selected a company and a domain (see: [Basic Steps](#)).

Inventory

1 Company Selection 2 Domain Selection 3 **Linux Systems** 4 Summary 5 Scheduling

☒ Inventory Linux Systems

Advanced

- ☒ Limit pings executed in parallel during the search to 60
- ☐ Discard already found systems after new search in the wizard
- ☐ Update selected systems: Search IP ranges again if inventory is scheduled.
- ☒ Include connection data for communication map

Add IP Range

IP from: 172.31.251.1 IP to: 172.31.251.254

User: root Password: *****

Port: 22 ☐ Use Sudo RSA Key: <no entry>

New Save Clear

Systems

Host Name: DSLX10 or IP: 172.31.251.40

User: root Password: *****

Port: 22 ☐ Use Sudo RSA Key: <no entry>

New Save Delete

HOST NAME	IP ADDRESS
DSLX10	172.31.251.40
DSLX11	172.31.251.41
DSLX12	172.31.251.42
DSLX13	172.31.251.43
dslx14.dsra.local	172.31.251.44
nci.v15	172.31.251.45

Start Search Cancel Load List

Back Next Cancel

If the firewall is alerted due to too many pings during the search of the IP segments, the number of parallel pings can be limited during the search.

If a new search is started in a different IP range, the *Discard already found systems after new search* option can be used to define whether already existing systems should be deleted.

When Linux inventory is scheduled and executed at a later time, the *Update selected systems* option can be used to determine whether only the selected systems are inventoried or the IP area is scanned again, and all found systems are taken into account for the inventory.

If the [connection data](#) is not required, it is possible to exclude it during the inventory by using the option *Include connection data for communication map* and thereby speeding up the inventory process.

A Sudo user can also be used for the inventory. For this you have to activate the *Use Sudo* checkbox.

RSA Key

Using the RSA keys created in Docusnap Management, the password can be omitted. RSA keys can be selected for entire IP ranges as well as for individual systems. The preselection from the IP ranges can be overwritten for individual systems. If no RSA key is used, a password must be entered. However, both

authentication options can be used simultaneously - RSA key and password. Both variants are checked, the first one, which has success with the login, is used.

The screenshot shows the 'Inventory' application window with a progress bar at the top indicating five steps: 1. Company Selection, 2. Domain Selection, 3. Linux Systems (current step), 4. Summary, and 5. Scheduling. Below the progress bar, there is a checkbox for 'Inventory Linux Systems' and a dropdown menu set to 'Advanced'.

The 'Add IP Range' section contains the following fields:

- IP from: 172.31.251.1
- IP to: 172.31.251.254
- User: root
- Password: (empty)
- Port: 22
- Use Sudo: ☐
- RSA Key: RSA Key 1 (selected from a dropdown menu that also shows '<no entry>', 'Migrated RSA Key', 'RSA Key 1', and 'RSA Key 2')

Below these fields is a 'New' button. To the right, there is a table with columns 'IP FROM' and 'IP TO' containing the range 172.31.251.1 to 172.31.251.254. Below the table are buttons for 'Start Search', 'Cancel', and 'Load List'.

The 'Systems' section contains the following fields:

- Host Name: DSLX10
- or IP: 172.31.251.40
- User: root
- Password: (empty)
- Port: 22
- Use Sudo: ☐
- RSA Key: RSA Key 1

Below these fields are buttons for 'New', 'Save', and 'Delete'. To the right, there is a table with columns 'HOST NAME' and 'IP ADDRESS' listing several systems:

HOST NAME	IP ADDRESS
DSLX10	172.31.251.40
DSLX11	172.31.251.41
DSLX12	172.31.251.42
DSLX13	172.31.251.43
dslx14.dsra.local	172.31.251.44
DSLX15	172.31.251.45

At the bottom of the window are buttons for 'Back', 'Next', and 'Cancel'.

There are two ways to identify the available Linux systems:

Entering an IP Segment Manually

First, you need to enter the required information (*IP from*, *IP to*, *User*, *Password*, *Port*) in the *Add IP Range* group and save this information. Then, click the *Start Search* button to identify the Linux systems in the specified segment(s). During this process, the individual IP addresses in the specified segments will be pinged. Each Linux system that replies successfully will be added to the *Found Systems* list.

If multiple IP ranges should be included in the inventory, they can also be imported from a CSV file by clicking the *Load List* button, instead of creating them individually using the buttons *New* and *Save*. In the CSV file the values for *IP from*, *IP to*, *User*, *Password* and *Port* must be listed in that order separated by ";". If no port is specified the port 22 is used by default. If a line doesn't match this format, this one will be omitted.

Entering Individual Computers Manually

In addition to scanning entire IP ranges for systems, you can also specify a single system. In the *Found Systems* group, click the *New* button and then enter either a

system name or an IP address as well as the *User* name and the *Password* for the system(s) to be scanned subsequently.

The actual inventory process is based on the systems listed in the *Found Systems* group. All systems selected there will be scanned.



To perform an automatic scan of Linux systems, the user must have "root" permissions, the SSH daemon must be running on the remote Linux system and port 22 must be open.

4.1.7 Mac Systems

To start the wizard for inventorying Mac systems, click the *Mac* button on the Inventory ribbon. The *Mac Systems* step will be displayed after you have selected a company and a domain (see: [Basic Steps](#)).

Inventory

1 Company Selection 2 Domain Selection 3 **Mac Systems** 4 Summary 5 Scheduling

☒ Inventory Mac Systems

☐ Updated selected systems: Search IP ranges again when inventory is scheduled.

☒ Discard already found systems after new search

Add IP Range

IP from: 192.168.102.60 IP to: 192.168.102.200

User: docusnap Password: *****

Port: 22

New Save Clear

IP FROM	IP TO
192.168.102.60	192.168.102.200

Start Search Cancel Load List

Systems

Host Name: or IP: 192.168.102.121

User: docusnap Password: ****

Port: 22

New Save Delete

HOST NAME	IP ADDRESS
192.168.102.121	192.168.102.121

Back Next Cancel

When Mac inventory is scheduled and executed at a later time, the *Update selected systems* option can be used to determine whether only the selected systems are inventoried or the IP area is scanned again, and all found systems are taken into account for the inventory.

If a new search is started in a different IP range, the *Discard already found systems after new search* option can be used to define whether already existing systems should be deleted.

There are two ways to identify the available Mac systems:

Entering an IP Segment Manually

First, you need to enter the required information (*IP from*, *IP to*, *User*, *Password*, *Port*) in the *Add IP Range* group and save this information. Then, click the *Start Search* button to identify the Mac systems in the specified segment(s). During this process, the individual IP addresses in the specified segments will be pinged. Each Mac system that replies successfully will be added to the *Found Systems* list.

If multiple IP ranges should be included in the inventory, they can also be imported from a CSV file by clicking the *Load List* button, instead of creating them individually using the buttons *New* and *Save*. In the CSV file the values for IP from, IP to, User, Password and Port must be listed in that order separated by ";". If no port is specified the port 22 is used by default. If a line doesn't match this format, this one will be omitted.

Entering Individual Computers Manually

In addition to scanning entire IP ranges for systems, you can also specify a single system. In the *Found Systems* group, click the *New* button and then enter either a system name or an IP address as well as the *User* name and *Password* for the system to be scanned subsequently.

The actual inventory process is based on the systems listed in the *Found Systems* group. All systems selected there will be scanned.



4.1.8 CIFS

To start the wizard for inventorying your CIFS systems, click the CIFS button on the Inventory ribbon. The CIFS step will be displayed after you have selected a company and a domain (see: [Basic Steps](#)).

Inventory

1 Company Selection 2 Domain Selection 3 CIFS 4 Summary 5 Scheduling

☒ Inventory CIFS Systems

Host Name:

Community:

User:

Password:

<input type="checkbox"/>	WINDOWS SERVER	USER	PASSWORD
<input checked="" type="checkbox"/>	cifs.docusnap.intern	docusnap\Adminis...	*****

The primary goal when inventorying CIFS systems is to scan the shares and the associated permissions. This information forms the basis for a permission analysis with Docusnap (see the [Permission Analysis](#) section).

Identify the CIFS system to be scanned by completing the *Host Name*, *User*, *Password* and *Community* fields. After the desired systems have been added to the table of CIFS systems, you can use the checkbox next to each system to specify whether it is to be included in the inventory scan or not.



If you want to use another user, than the currently logged on user, for the inventory of a CIFS system, please note that existing connections (like a network drive) between the Docusnap system and the CIFS system, which should be inventoried, must be separated beforehand. An overview of the existing network connections are obtained by entering *net use* at a command prompt.

4.1.9 Exchange Server

To start the wizard for inventorying your Exchange servers, click the *Network Scan* or *Exchange Server* button on the Inventory ribbon. After you have selected a company and a domain and entered your credentials (see: [Basic Steps](#)) the *Exchange Server* step will display.

For inventorying Exchange servers, you can select what information should be retrieved as well by using the *Advanced* button. In the *Maximum Number of Threads* field you can specify how many parallel threads are started simultaneously on the Exchange servers. In most cases, the default setting of four threads is recommended. If the inventory process slows down the Exchange server, the number of threads can be decreased.

Inventory

1 Company Selection 2 Authentication 3 Exchange Server 4 Summary 5 Scheduling

☒ Inventory Exchange Server

Exchange Server

Search for Exchange Server:

<input checked="" type="checkbox"/>	NAME	VERSION
<input checked="" type="checkbox"/>	DSEX01	Version 15.0 (Build 31104.5)

☒ Mailboxes
☒ Permissions
☒ Mailbox Folders
☒ AD Permissions (Send As, ...)
☒ Public Folders
☒ Contacts
☒ Distribution Groups
☒ Other (Certificates, ...)
☐ Extended Information (AD Permissions)

Maximum Number of Threads: 4

Click the *Start Search* button to let Docusnap search the Active Directory for registered Exchange servers. These will be displayed in the *Found Systems* list. Then, you can select the Exchange servers whose mailboxes, public folders, and permissions you want to inventory. If you do not carry out this search, but immediately click *Next*, all existing Exchange Servers will be included in the inventory.



Scanning Exchange servers can cause problems when subdomains are to be inventoried. Exchange services are always registered in the root domain, even if the Exchange Server installation is physically located in a subdomain. To be able to collect the desired

information in such a situation, you will need the appropriate permissions for the root domain.

4.1.10 VMware Infrastructure

To start the wizard for inventorying the VMware infrastructure, click the *VMware Infrastructure* button on the Inventory ribbon. The *VMware Infrastructure* step will be displayed after you have selected a company and a domain (see: [Basic Steps](#)).

Inventory

1 Company Selection 2 Domain Selection 3 **VMware Infrastructure** 4 Summary 5 Scheduling

☒ Inventory VMware Infrastructure

vCenter/ESX Server:

User:

Password:

<input checked="" type="checkbox"/>	WINDOWS SERVER	USER	PASSWORD	
<input checked="" type="checkbox"/>	SVIC02	intern\admin	*****	

Click the *New* button to specify the desired VMware VCenter server, VMware server, VMware ESXi or VMware vSphere. In the *vCenter/ESX Server* field, you can specify the name or the IP address.



Depending upon the configuration of the VMware product, you may have to specify a port in the *vCenter/ESX Server* field in order to establish a connection.

4.1.11 Hyper-V

To start the wizard for inventorying Hyper-V servers, click the *Hyper-V* button. After you have selected a company and a domain or entered your credentials (see: [Basic Steps](#)) the *Hyper-V* step is displayed.

Inventory

1 Company Selection 2 Authentication 3 **Hyper-V** 4 Summary 5 Scheduling

☒ Inventory Hyper-V Server

Hyper-V Server:

User:

Password:

☒ Server Authentication

<input checked="" type="checkbox"/>	NAME	AUTHENTICAT...	INFO
<input checked="" type="checkbox"/>	CHYPERV01.intern.local	Special Credent...	

To inventory the desired Hyper-V servers, click the *New* button and specify the name of the respective system. You can also enter alternative credentials to those in the *Authentication* step. After you have saved your entry, Docusnap will check whether this system belongs to the domain you specified. If yes, the server will be added to the list at the top of the window, and the *Next* button becomes active. If the specified server name is not correct, the button remains grayed out. After adding the desired systems to the *Hyper-V Server* table, you can use the checkbox next to each system to specify whether it is to be included in the inventory scan or not.

If the specified server name is a cluster Hyper-V, the Docusnap inventories the information of the cluster, including all hosts in the cluster. If only the name of a Hyper-V server is entered, then just the data of this server is inventoried.

4.1.12 Internet Information Service

To start the wizard for inventorying Internet Information Service (IIS) systems, click the *IIS* button. After you have selected a company and a domain (see: [Basic Steps](#)) the *IIS* step is displayed.

Inventory

1 2 3 4 5
Company Selection Authentication **IIS** Summary Scheduling

☒ Inventory IIS Server

IIS:

User:

Password:

☐ Server Authentication

<input checked="" type="checkbox"/>	NAME	SECURITY	INFO
<input checked="" type="checkbox"/>	DSSP02	Global Credenti...	

To inventory the desired IIS servers, click the *New* button and specify the name of the respective server. You can also enter alternative credentials to those in the *Authentication* step. After you have saved your entry, Docusnap will check whether this server belongs to the domain you specified. If yes, the server will be added to the list at the top of the window, and the *Next* button becomes active. If the specified server name is not correct, the button remains grayed out. After the desired systems have been added to the table of IIS servers, you can use the checkbox next to each system to specify whether it is to be included in the inventory scan or not.

4.1.13 SharePoint

To start the wizard for inventorying SharePoint servers, click the *Share Point* button. After you have selected a company and a domain and entered your credentials (see: [Basic Steps](#)) the *SharePoint* step is displayed.

Inventory

1 Company Selection 2 Authentication 3 **SharePoint** 4 Summary 5 Scheduling

☒ Inventory SharePoint Server

☒ Inventory Job History 5 Entries

Edit Systems

SharePoint: DSSP01

User:

Password:

☐ Server Authentication

New Save Delete

	NAME	SECURITY	INFO
<input checked="" type="checkbox"/>	DSSP01	Global Credenti...	Connection successful
<input checked="" type="checkbox"/>	DSSP02	Global Credenti...	Connection successful

i Inventory of the SharePoint server is only possible with farm administrator authentication.

Back Next Cancel

Along with a scan of the SharePoint servers, it is possible to retrieve the job history. If you tick the *Inventory Job History* checkbox, only the most recent entries will be retrieved. You can specify the number of entries to be saved in the *Entries* field.

There are two ways to scan SharePoint servers: Either you use global credentials for login. In this case, only the name of the SharePoint server is required for the scanning process. Or you log in using specific credentials. For this purpose, you need to enable the *Server Authentication* checkbox. This allows you to enter the user and password information.

After adding the desired systems to the *SharePoint Server* table, you can use the checkbox next to each system to specify whether it is to be included in the inventory scan or not. The *Next* button will only be enabled once you have specified a SharePoint server. Then, you can continue with the inventory process.

An inventory of the SharePoint servers forms the basis for a subsequent analysis of the SharePoint permissions (see: [Permission Analysis](#)).

4.1.14 SQL Server

To start the wizard for inventorying your SQL servers, click the *SQL Server* button on the *Inventory* ribbon. The *SQL Server* step will be displayed after you have selected a company and a domain and entered your credentials (see: [Basic Steps](#)).

Inventory

1 Company Selection 2 Domain Selection 3 SQL Server 4 Summary 5 Scheduling

☒ Inventory SQL Server

☒ Limit Backup History 10 Entries Advanced

SQL Servers

Search SQL Server: Start Search Cancel

SQL Server: DSFS02.dsra.local

User: sa

Password: *****

☒ SQL Server Authentication

New Save Delete

SERVER	SECURITY SETTINGS	INFORMATION
<input checked="" type="checkbox"/> DSFS02.dsra.local	SQL Server Security	Verbindung erfolgreich
Exclude Databases		
<input checked="" type="checkbox"/> AppMng_Service_DB_348e88f1338...		
<input type="checkbox"/> Bdc_Service_DB_78e550f87c374634...		
<input checked="" type="checkbox"/> Managed Metadata Service_6fd81...		
<input type="checkbox"/> master		
<input checked="" type="checkbox"/> model		
<input type="checkbox"/> msdb		
<input checked="" type="checkbox"/> PerformancePoint Service Applicat...		
<input type="checkbox"/> ReportServer		
<input type="checkbox"/> ReportServerTempDB		
<input type="checkbox"/> Search_Service_Application_Analyt...		
<input checked="" type="checkbox"/> Search_Service_Application_Crawl...		
<input checked="" type="checkbox"/> Search_Service_Application_DB_8f...		

Verbindung erfolgreich

Back Next Cancel

There are two ways to identify SQL servers:

Searching for SQL Servers Automatically

When you click the *Start Search* button, Docusnap will attempt to identify the SQL servers in your network. If SQL servers have been found, they will be listed in the *SQL Servers Found* table.



Entering an SQL Server Manually


In addition to an automatic search for SQL servers, you can specify a single SQL server in Docusnap manually. Click the *New* button and specify the system to be scanned subsequently.

In addition to the SQL server name, and the name of the instance if required, a dedicated port can also be specified for the inventory process. The port is separated by a comma ",".

The following icons indicate the access rights to an SQL server:

-  The SQL server can be scanned.

-  The server can only be scanned to a limited extent. In order to completely scan the server, you need to enter valid SQL authentication data manually.
-  The server cannot be scanned because you do not have the required permissions. In order to scan this server, you need to enter valid SQL authentication data manually.

When the connection to a SQL server is successful, it can be defined individually which databases are to be inventoried. Click the  button to list all databases of the SQL server. To exclude databases from the inventory, check the checkbox to this database.

Using the Advanced Options button the following options for the inventory can be established. Using the *Scan Tables* and *Scan Columns*, you can specify the scope of the inventory scan. To determine the procedures to be scanned, you can select *Scan Custom Procedures* and *Scan System Procedures*. Using the *Scan Procedure Source Code* option, you can specify whether the procedure source code will be scanned as well.

During the scan of the SQL servers, the backup history is retrieved. If you tick the *Limit Backup History* checkbox, only the most recent entries will be retrieved. You can specify the number of entries to be saved in the *Entries* field.

4.1.15 Oracle

To start the wizard for inventorying your Oracle databases, click the *Oracle* button on the *Inventory* ribbon. The *Oracle* step will be displayed after you have selected a company and a domain (see: [Basic Steps](#)).

Inventory

1 Company Selection 2 Domain Selection 3 **Oracle** 4 Summary 5 Scheduling

☒ Inventory Oracle

Server:

Service Name:

Port:

User:

Password:

☒ Server Authentication

☐ Include System Schema

<input type="checkbox"/>	SERVER	SECURITY SETTINGS	INFORMATION
<input checked="" type="checkbox"/>	192.168.11.33	Server Security	Connection successful

☒ Connection successful

Enter the name of the *Oracle* server in the *Server* field to inventory the Oracle databases. The service name of the connection must be entered into the *Service Name* field. The port 1521 is given by default and can be changed in the *Port* field when needed.

If global credentials should not be used for the inventory, then alternative credentials can be entered. For this purpose, you need to enable the *Server Authentication* checkbox. This allows you to enter the user and password information.

Use the *Include System Schema* checkbox to define, if the data of the system schema should be inventoried too.

After adding the desired systems to the *List of Servers* overview, you can use the checkbox next to each system to specify whether it is to be included in the inventory scan or not. The *Next* button will only be enabled once you have specified an *Oracle* server. Then, you can continue with the inventory process.

Script for creating a user for inventory

To inventory an Oracle databases an Oracle user with "create session" and "select any dictionary" rights is required. With the following script a user can be created who can read the data dictionary, but has no access to the user data of the database. This script must be run against the Oracle database you want to

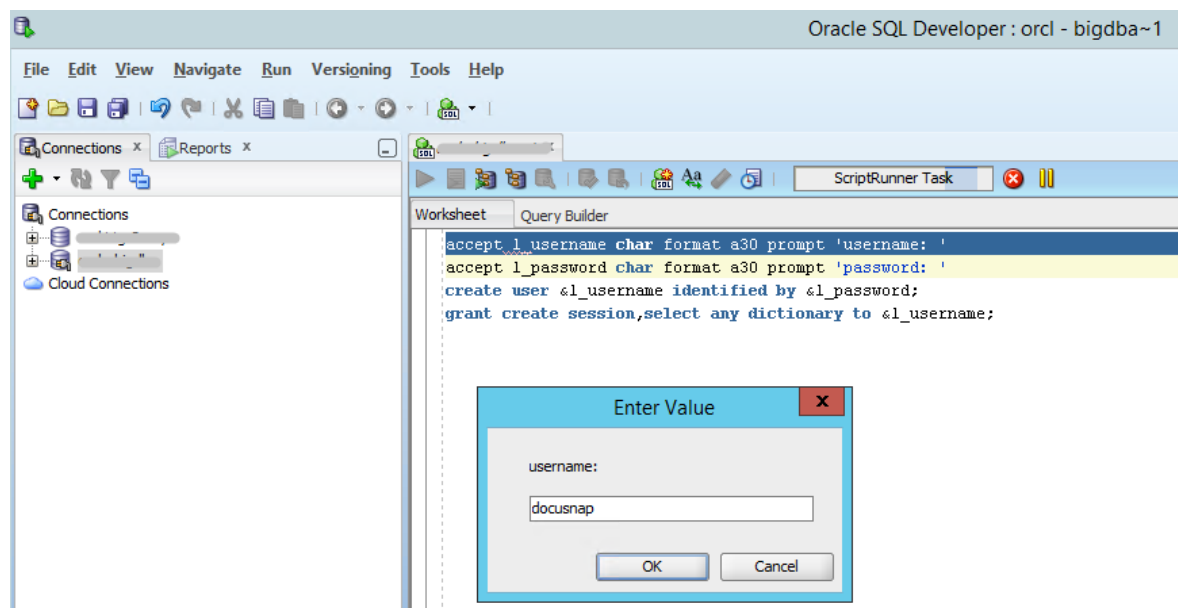
inventory, use e.g. SQL*Plus or SQL Developer. This user can then be used in Docusnap Wizard for Oracle Inventory.

```
accept l_username char format a30 prompt 'username: '  
accept l_password char format a30 prompt 'password: '  
create user &l_username identified by &l_password;  
grant create session,select any dictionary to &l_username;
```

SQL*Plus

```
SQL>  
SQL>  
SQL>  
SQL>  
SQL> accept l_username char format a30 prompt 'username: '  
username: docusnap  
SQL> accept l_password char format a30 prompt 'password: '  
password: *****  
SQL> create user &l_username identified by &l_password;  
old 1: create user &l_username identified by &l_password  
new 1: create user docusnap identified by *****  
  
User created.  
  
SQL> grant create session,select any dictionary to &l_username;  
old 1: grant create session,select any dictionary to &l_username  
new 1: grant create session,select any dictionary to docusnap  
  
Grant succeeded.  
  
SQL>  
SQL>
```

SQL Developer



4.1.16 XenCenter

To start the wizard for inventorying Xen servers, click the *XenCenter* button on the *Inventory* ribbon. After you have selected a company and a domain (see: [Basic Steps](#)) the *XenCenter* step is displayed.

Inventory

1 Company Selection 2 Domain Selection 3 **XenCenter** 4 Summary 5 Scheduling

☒ Inventory XenCenter

Xen Server: 192.168.100.128

Port: 80

User: root

Password: *****

New Save Delete

<input checked="" type="checkbox"/>	WINDOWS SERVER	USER	PASSWORD
<input checked="" type="checkbox"/>	192.168.100.128	root	*****

Back Next Cancel

Click the *New* button in the *Add Xen Server* area to specify the Xen server. The *Xen Server* text box accepts the name or the IP address of the Xen server.

4.1.17 Active Directory

To start the wizard for inventorying the Active Directory service, either click the *Network Scan* button or the *Active Directory* button. The *Active Directory* step will be displayed after you have selected a company and a domain and entered your credentials (see: [Basic Steps](#)).

Inventory

1 Company Selection 2 Authentication 3 Active Directory 4 Summary 5 Scheduling

☒ Inventory Active Directory

Start Search at:

☒ Scan Group Policies GMPC Host:

Active Directory Classes

<input checked="" type="checkbox"/>	CLASS	CLASS FILTER
<input checked="" type="checkbox"/>	User	user
<input checked="" type="checkbox"/>	Group	group
<input checked="" type="checkbox"/>	Contact	contact
<input checked="" type="checkbox"/>	Computer	computer
<input checked="" type="checkbox"/>	Volume	volume
<input checked="" type="checkbox"/>	InetOrgPerson	inetOrgPerson
<input checked="" type="checkbox"/>	Foreign Security Principal	foreignSecurityPrincipal
<input checked="" type="checkbox"/>	BuiltInDomain	builtindomain

☒ GPMC check successful

Using the *Start Search at* filter criterion, you can restrict the AD scan to a specific organizational unit. Click the *Select OU* button to open a dialog where you can select the desired organizational unit. If you do not enter a filter criterion, Docusnap will inventory the entire Active Directory system.

In the *Advanced* option you can, by enabling the checkbox *Scan Permissions*, determine whether the permissions for an Active Directory object should be inventoried. It can also be determined whether the sites and the domain structure should also be inventoried.



The *Permission Analysis* module requires a complete Active Directory inventory of users and groups to be completely correct. Thus you can determine for the Active Directory inventory, that users and groups of all organizational units will be scanned, even if a filter for a specific organizational unit has been defined. Once an organizational unit has been set, the *Inventory all Users and Groups* checkbox will be displayed in the *Advanced* option for this purpose.

In addition, you can retrieve group policies. They will then be displayed with the corresponding organizational units or domain. To scan the information for group policy objects, you need to specify the computer where the Group Policy Manager Console (GPMC) is installed. It does not matter whether the GPMC is available on the local system or on a remote system.

In the *Active Directory Classes* group, you can select the Active Directory classes to be included in the scan.

4.1.18 DHCP Server

To start the wizard for inventorying your DHCP servers, click the *DHCP* button on the Inventory ribbon. The *DHCP Server* step will be displayed after you have selected a company and entered your credentials.

The screenshot shows the 'Inventory' application window with a progress bar at the top indicating five steps: 1. Company Selection, 2. Authentication, 3. DHCP Server (current step), 4. Summary, and 5. Scheduling. Below the progress bar, the 'Inventory DHCP Server' checkbox is checked. The main area contains a 'Search for DHCP Server:' section with a 'Start Search' button and a 'Host Name:' field containing 'DSDC01.dsra.local'. Below the host name field are 'New', 'Save', and 'Delete' buttons. To the right is a list box with a header 'NAME' and one entry 'DSDC01.dsra.local' which is selected. At the bottom right are 'Back', 'Next', and 'Cancel' buttons.

There are two ways to identify DHCP servers:

Searching for DHCP Servers Automatically

When you click the *Start Search* button, Docusnap will attempt to identify the DHCP servers in your network. If DHCP servers could be determined, they will be listed in the list.

Entering a DHCP Server Manually

In addition to performing an automatic search for DHCP servers, you can specify a single DHCP server in Docusnap manually. Click the *New* button to specify the system to be scanned subsequently.

4.1.19 DNS Server

To start the wizard for inventorying your DNS servers, click the *DNS* button on the Inventory ribbon. The *DNS Server* step will be displayed after you have selected a company and entered your credentials.

Inventory

1 2 3 4 5
Company Selection Authentication **DNS Server** Summary Scheduling

☒ Inventory DNS Server

☐ Consider only DNS Server of the Current Domain

Edit Systems

Search for DNS Server:

Host Name:

<input checked="" type="checkbox"/>	NAME	
<input checked="" type="checkbox"/>	DSDC02	
<input checked="" type="checkbox"/>	DSDC01	

There are two ways to identify DNS servers:

Searching for DNS Servers Automatically

When you click the *Start Search* button, Docusnap will attempt to identify the DNS servers in your network. If DNS servers have been determined, they will be listed in the list.

The automatic search will find all DNS servers of the selected domain, including DNS servers that are located in a subdomain. The *Consider only DNS Servers of the Current Domain* checkbox lists and inventories only DNS servers that are located in the domain selected in the *Authentication* step and not DNS servers from any subdomains.

Entering DNS Servers Manually

In addition to performing an automatic search for DNS servers, you can specify a single DNS server in Docusnap manually. Click the *New* button to specify the system to be scanned subsequently.

4.1.20 Backup Exec

To start the wizard for inventorying your *Backup Exec Server*, click the *Backup Exec* button on the *Inventory* ribbon. The *Backup Infrastructure* step will be displayed after you have selected a company and a domain (see: [Basic Steps](#)).

Inventory

1 Company Selection 2 Domain Selection 3 Backup Infrastructure 4 Summary 5 Scheduling

☒ Inventory Backup Infrastructure

Backup History: 1 Days Back Advanced

Systems

SQL Server: DSBK01.DSRA.LOCAL
 Database: BEDB
 User: sa
 Password: *****

☒ SQL Server Authentication

New Save Delete

<input checked="" type="checkbox"/>	WINDOWS SERVER	BACKUP EXEC SER...	USER	PASSWORD
<input checked="" type="checkbox"/>	DSBK01.DSRA.LOCAL	DSBK01	sa	*****

Back Next Cancel

To inventory the *Backup Exec* infrastructure the name of the SQL server where the data of the *Backup Exec* server is located, has to be entered in the *SQL Server* field. By default the name of the database is *BEDB*. If the database is named differently, then the name has to be entered into the *Database* field.

If global credentials should not be used for the inventory, then alternative credentials can be entered. For this purpose, you need to enable the *SQL Server Authentication* checkbox. This allows you to enter the user and password information.

After adding the desired systems, you can use the checkbox next to each database to specify whether it is to be included in the inventory scan or not. The *Next* button will only be enabled once you have specified a *Backup Exec* database. Then, you can continue with the inventory process.

4.1.21 DFS

To start the wizard for inventorying Distributed File Systems, click the *DFS* button. After you have selected a company and a domain (see: [Basic Steps](#)) the *DFS* step is displayed.

Inventory

1 Company Selection 2 Authentication 3 **DFS** 4 Summary 5 Scheduling

☒ Inventory DFS Server

DFS Server:

User:

Password:

☐ Server Authentication

<input checked="" type="checkbox"/>	NAME	AUTHENTICAT...	INFO
<input checked="" type="checkbox"/>	SMDC0001.docusnap.intern	Global Credenti...	

To inventory the desired DFS servers, click the *New* button and specify the name of the respective system. You can also enter alternative credentials to those in the *Authentication* step. After you have saved your entry, Docusnap will check whether this system belongs to the domain you specified. If yes, the server will be added to the list, and the *Next* button becomes active. If the specified server name is not correct, the button remains disabled. After adding the desired systems to the table, you can use the checkbox next to each system to specify whether it is to be included in the inventory scan or not.

4.1.22 Veeam

To start the wizard for inventorying *Veeam* servers, click the *Veeam* button. After you have selected a company and a domain (see: [Basic Steps](#)) the *Veeam* step is displayed.

Inventory

1 Company Selection 2 Domain Selection 3 **Veeam** 4 Summary 5 Scheduling

☒ Inventory Veeam

Limit History: 14 Days Back

Systems

SQL Server: DSBK01.DSRA.LOCAL

Database: VeeamBackup

User: sa

Password: *****

☒ SQL Server Authentication

New Save Delete

<input checked="" type="checkbox"/>	WINDOWS SERVER	VEEAM DATABASE	USER	PASSWORD	
<input checked="" type="checkbox"/>		DSBK01.DSRA.LOCAL	VeeamBackup	sa	*****

Back Next Cancel

To inventory the *Veeam* infrastructure the name of the SQL server where the data of the *Veeam* server is located, has to be entered in the *SQL Server* field. By default the name of the database is *VeeamBackup*. If the database is named differently, then the name has to be entered into the *Database* field.

If global credentials should not be used for the inventory, then alternative credentials can be entered. For this purpose, you need to enable the *SQL Server Authentication* checkbox. This allows you to enter the user and password information.

Use the field *Days Back* to specify for how many days the job history should be inventoried.

After adding the desired systems to the *Systems* overview, you can use the checkbox next to each database to specify whether it is to be included in the inventory scan or not. The *Next* button will only be enabled once you have specified a *Veeam* database. Then, you can continue with the inventory process.

4.1.23 EMC² Isilon

To start the wizard for inventorying *EMC² Isilon* systems, click the *EMC² Isilon* button. After you have selected a company and a domain (see: [Basic Steps](#)) the *EMC² Isilon* step is displayed.

Inventory

Inventory

1

2

3

4

5

Company Selection

Domain Selection

EMC² Isilon

Summary

Scheduling

☒ Inventory EMC² Isilon

Host Name / IP Address:

172.31.1.94

Port:

8080

User:

root

Password:

☐ Accept Untrusted SSL Certificates

New

Save

Delete

<input checked="" type="checkbox"/>	CLUSTER NAME	IP ADDRESS
<input checked="" type="checkbox"/>	ISILON-CL1	172.31.1.94
<input checked="" type="checkbox"/>	ISILON-CL2	172.31.1.100

Back

Next

Cancel

To inventory the desired *EMC² Isilon* system, click the *New* button and specify the respective system. The *Host Name / IP Address* text box accepts the name or the IP address of the EMC² Isilon system. By default, port 8080 is used, this can be changed. Additionally, the user name and password of a user must be specify, who has access to the system. It can also be defined that untrusted SSL certificates are accepted.

4.1.24 Igel

To start the wizard for inventorying *Igel* systems, click the *Igel* button. After you have selected a company and a domain (see: [Basic Steps](#)) the *Igel* step is displayed.



Inventory

1 Company Selection 2 Domain Selection **3 Igel** 4 Summary 5 Scheduling

☒ **Inventory Igel**

Define Subnet Mask (to use in network and routing map): 255.255.255.0

Systems

SQL Server: ssql01
 Database: RMDB
 User: docusnap
 Password: *****
☒ SQL Server Authentication

New Save Delete

<input checked="" type="checkbox"/>	SERVER	DATABASE	USER	PASSWORD
<input checked="" type="checkbox"/>	ssql01	RMDB	docusnap	*****

i Igel inventory is based on MS SQL, not on Embedded DB which is used by default

Back Next Cancel

In order for the inventoried thin clients to be considered in the network and routing map, a subnet mask must be specified. The subnet mask can not be determined by inventory, so it must be entered manually in the *Define Subnet Mask* field.

To inventory the *Igel* systems the name of the SQL server where the data of the thin clients is located, has to be entered in the *SQL Server* field. Only thin clients can be inventoried, if the database is a MS SQL database. The name of the database has to be entered into the *Database* field.

If global credentials should not be used for the inventory, then alternative credentials can be entered. For this purpose, you need to enable the *SQL Server Authentication* checkbox. This allows you to enter the user and password information.

After adding the desired systems, you can use the checkbox next to each database to specify whether it is to be included in the inventory scan or not. The *Next* button will only be enabled once you have specified a *Igel* database. Then, you can continue with the inventory process.

4.1.25 HP-UX

To start the wizard for inventorying *HP-UX* servers, click the *HP-UX* button. After you have selected a company and a domain (see: [Basic Steps](#)) the *HP-UX* step is displayed.

Inventory

1 Company Selection 2 Domain Selection 3 HP-UX 4 Summary 5 Scheduling

☒ Inventory HP-UX

Server Name: 172.31.1.9

Port: 22

User: root

Password: *****

New Save Delete

<input checked="" type="checkbox"/>	HP-UX SERVER	USER	PASSWORD	
<input checked="" type="checkbox"/>	172.31.1.9	root	*****	

Back Next Cancel

Click the *New* button to enter the name or IP address of the HP-UX server. For inventory, a user with a password must be specified that has access to the HP-UX server. The *Save* button saves the server and checks the connection. Once an *HP-UX* server has been saved, the *Next* button is activated and the inventory process can be started.

4.1.26 Azure

Docusnap now also inventories cloud environments. The Azure Inventory feature was added to Docusnap. Some steps are required to collect and map information from the Microsoft Azure infrastructure in Docusnap.

Preparations in Azure

This chapter describes the preparation steps to be carried out in Microsoft Azure to perform an inventory with Docusnap.

Proxy for Azure

If your network uses a proxy, you must specify the proxy parameters in the connection settings.

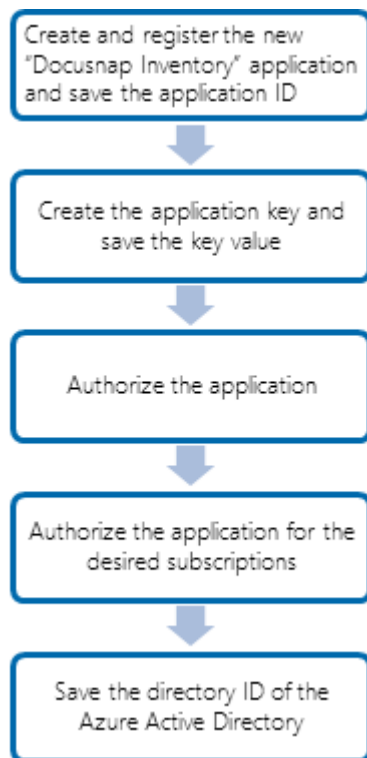
Docusnap Azure Inventory

This chapter describes the execution of the inventory.

4.1.26.1 Preparations in Azure

The Docusnap Azure Inventory dialog prompts you for multiple IDs. These IDs are assigned during the preparation in Azure. The values can be saved in a text editor to have them at hand when you are prompted to enter them in the *Azure Inventory Wizard*.

Overview



Required Permission

Before you start, make sure that you can log on as an Azure user who has global administrator rights.

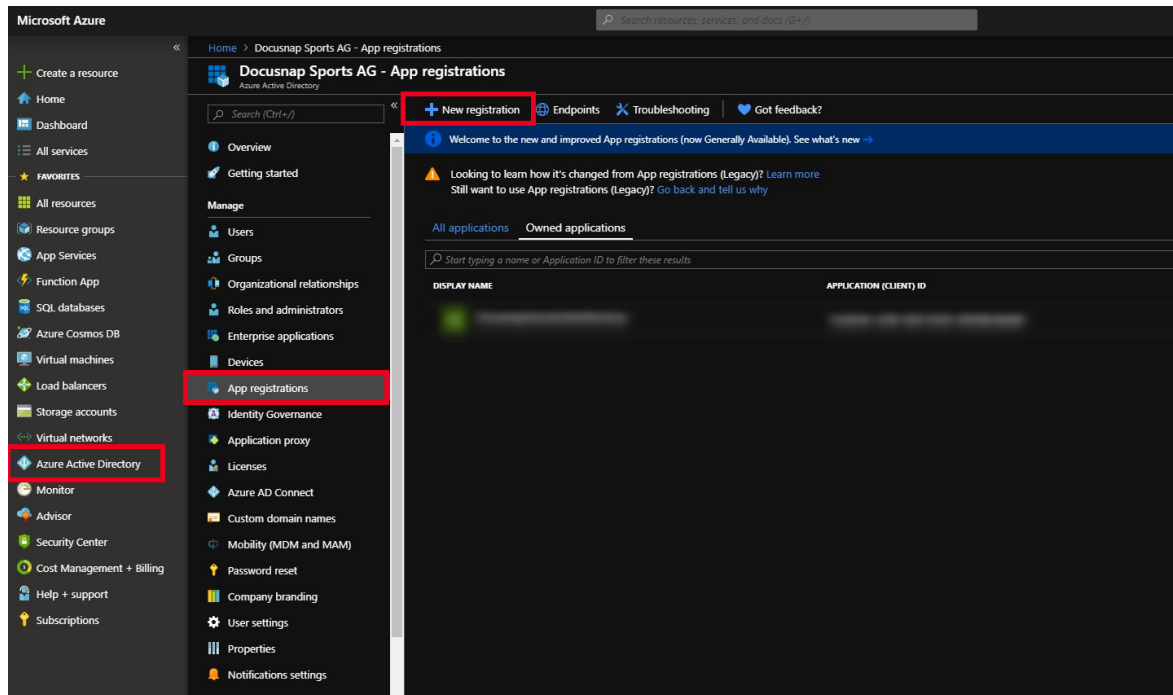
Creating the New Application

For the *Docusnap Azure Inventory* feature, a registered application is required. This application must have read access to the Microsoft Azure data. This section describes how to create such an application. In our example, the application is called "*Docusnap Inventory*". You can choose any name you like, but it is recommended to enter a meaningful name.

To grant the *Docusnap Azure Inventory* feature read access to the *Windows Azure Service Management API*, you need to create a new application of the *Web App / API* type.

Opening the *New application registration* dialog

- Select the *Azure Active Directory* item from the resource list or search
- In the *Azure Active Directory* view, select the *App Registrations* item under *Manage*
- Choose New Registration



Register the application

The following information is required to register the application:

- Name: Enter the application name *Docusnap-Inventory*.
- Supported account types: Here you can select who can use the application - select *Accounts in this organizational directory only*.

Microsoft Azure

Search resources, services, and docs (G+/i)

Home > Docusnap Sports AG - App registrations > Register an application

Register an application

*** Name**
The user-facing display name for this application (this can be changed later).
Docusnap-Inventory ✓

Supported account types
Who can use this application or access this API?

☒ Accounts in this organizational directory only (Docusnap Sports AG only - Single tenant)

☐ Accounts in any organizational directory (Any Azure AD directory - Multitenant)

☐ Accounts in any organizational directory (Any Azure AD directory - Multitenant) and personal Microsoft accounts (e.g. Skype, Xbox)

[Help me choose...](#)

Redirect URI (optional)
We'll return the authentication response to this URI after successfully authenticating the user. Providing this now is optional and it can be changed later, but a value is required for most authentication scenarios.

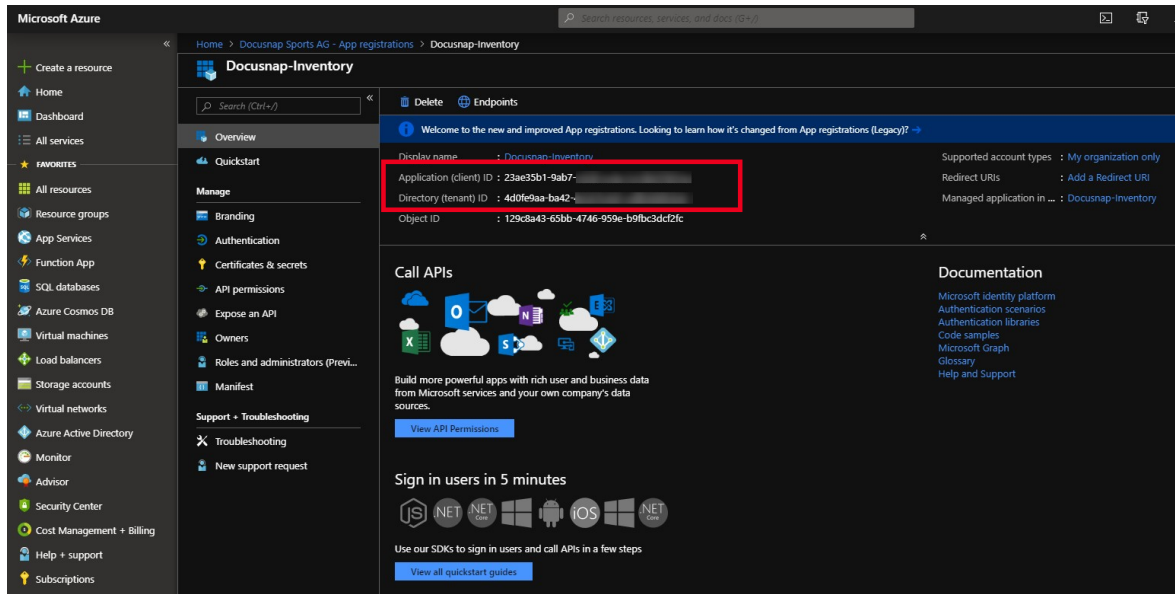
Web ✓

By proceeding, you agree to the [Microsoft Platform Policies](#)

Register

Determine Application and Directory ID

After the creation is completed, the overview dialog of the application is displayed. Now copy the application and directory ID and write it down for the Docusnap scan dialog.

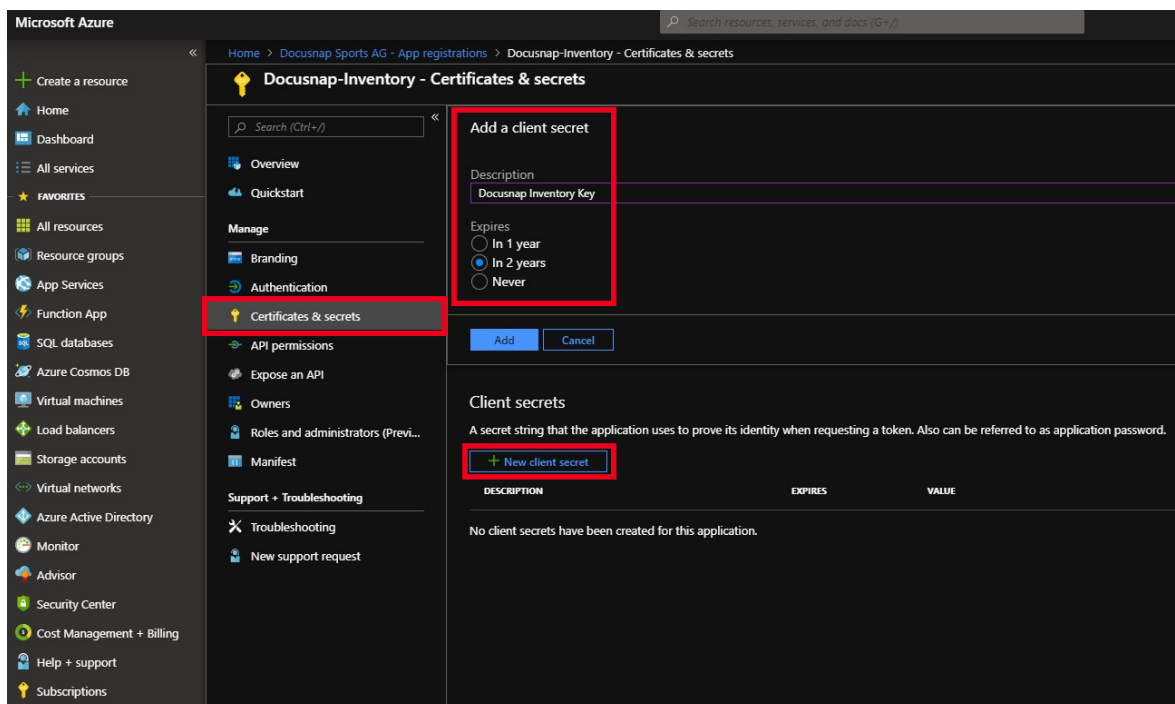


Create a client secret

Now create a client secret. In the *Manage* area, select the item *Certificates & secrets*

- *New client secret*
- Enter a *Description* and
- the *validity* of the secret

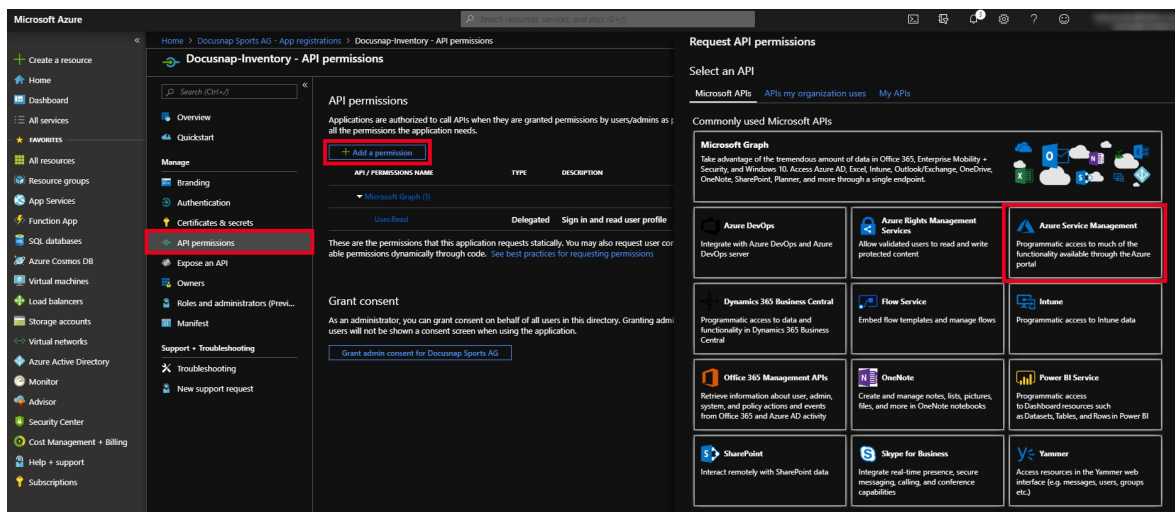
Note: The key can only be viewed directly after creation. If the key is lost or becomes invalid, a new key must be created.



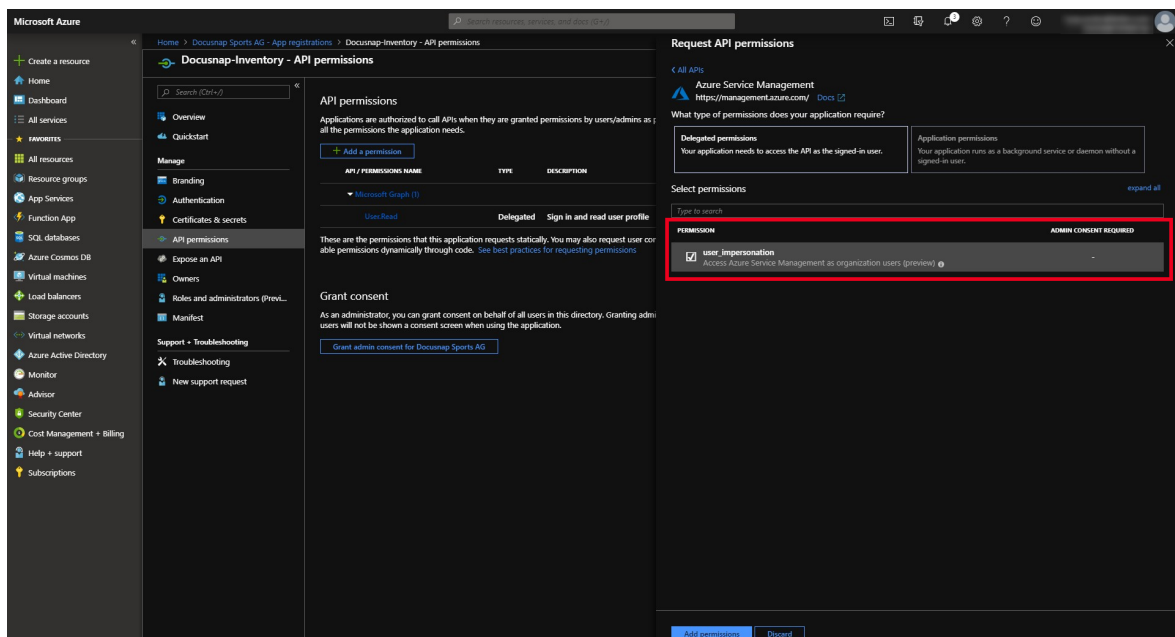
Authorizing the application – API permissions

Now the application must be authorized for the Windows Azure Service Management API.

- In the *Manage* pane, select *API Permissions*
- *Add a permission*
- *Azure Service Management*



- Now select the authorization *user_impersonation* (Access Azure Service Management as organization users) and add this authorization.

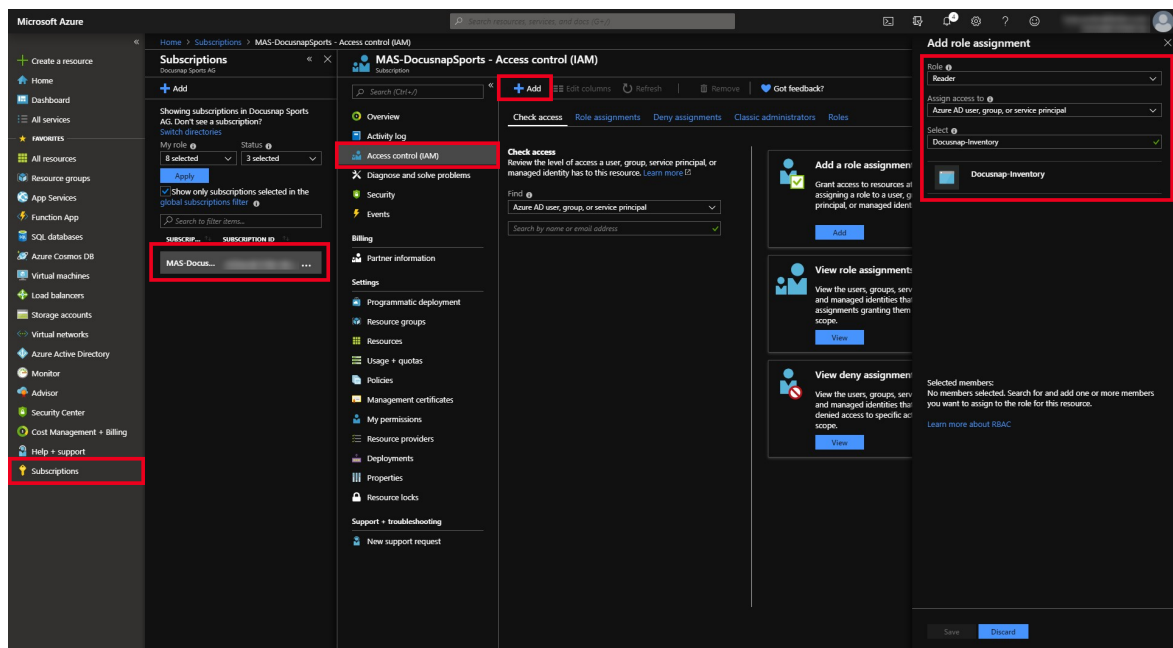


Authorizing the application for all desired subscriptions

Now the application is granted read access to the required subscriptions in Azure.

- From the resource overview or search, select *Subscriptions*
- Select the desired subscription
- In the subscription selection, choose *Access Control (IAM)*
- *Add – Add Role Assignment*
- In the role selection, select the *Reader* role.
- In the Select field, enter the name of your application
- Select your application. It will now be listed under Selected Members
- Confirm the assignment with a click on Save

Note: The steps listed must be repeated for each subscription you wish to inventory with Docusnap.



For a successful inventory, the following endpoints must be reachable:

- <https://login.microsoftonline.com>
- <https://management.azure.com/>

4.1.26.2 Proxy for Azure

If your network uses a proxy, you must specify the proxy parameters in the connection settings. It is possible that you normally do not need these settings when using the other scan modules. Basically, the proxy settings must be suitable for the respective DDS (Docusnap Discovery Service). The settings shown in the exemplary screenshot are suitable for interactive Azure inventory scans. If you



selected the Discovery Service of another location as the DDS, you would have to adjust the proxy settings for this DDS installation.

Adjusting the proxy settings:

- For this, the [General options](#) dialog has to be opened
- In the Options dialog, click [Connections](#).
- Under Proxy Settings:
 - select Set up manually
 - Under Address, enter your proxy URL including the Port number
 - Enter suitable values in the User and Password fields
- Click OK to confirm your changes

The screenshot shows the 'Options' dialog box with the 'Connections' tab selected. The 'Update Options' section has two unchecked checkboxes: 'Check for Updates on Startup' and 'Download both Docusnap Versions (x64 and x86)'. The 'Timeout' is set to 3 seconds. The 'Proxy Settings' section is highlighted with a yellow border and contains three radio buttons: 'Do not Use Proxy', 'Use System Settings', and 'Set up Manually' (which is selected). Below the radio buttons are fields for 'Address' (myProxy.example.proxy), 'Port' (8080), 'User' (example\user), and 'Password' (masked with asterisks). The 'Server API Connection' section has a checked checkbox 'Enable Server API Connection', a 'URL' field (http://localhost:9001/), a 'Transport' dropdown (Auto), and a 'Timeout' field (30 seconds). There is a 'Test Connection' button and 'OK'/'Cancel' buttons at the bottom right.

4.1.26.3 Inventory Azure

To start the wizard for inventorying *Azure*, click the *Azure* button. After you have selected a company and a domain (see: [Basic Steps](#)) the *Azure* step is displayed.

Inventory

1 Company Selection 2 Domain Selection 3 **Azure** 4 Name Snapshot ... Steps 5-6

☒ Inventory Azure Service

Display Name: ?

Directory ID: ?

Application ID: ?

Key: ?

<input checked="" type="checkbox"/>	DISPLAY NAME	PASSWORD
<input checked="" type="checkbox"/>	azure demo	c391e9fa-ab72-4884-9ce...

Subscriptions:

<input checked="" type="checkbox"/>	NAME	SUBSCRIPTION ID
<input checked="" type="checkbox"/>	Docusnap Prod	c2d7e0b5-a847-4554
<input checked="" type="checkbox"/>	Docusnap DEV	0758e912-4b00-4357
<input checked="" type="checkbox"/>	Docusnap QS	38df8230-1dea-484c-

Azure Inventory

Now, you need the previously collected IDs and key information that you saved in your text editor.

- The *Display Name* is only a placeholder and can therefore be chosen freely
- The *Directory ID* corresponds to the ID of your Azure Active Directory
- For the *Application ID*, enter the ID of the application you created previously
- In the *Key* field, enter the value of the key you created previously

Selecting subscriptions

All existing subscriptions are displayed in the *Subscriptions* panel and selected by default. You can deselect them as required. Please note that your Azure application must have been authorized for each selected subscription.

Completing the Azure scan settings

Finally, click *Save*. If a proxy error occurs, the [proxy configuration](#) must be checked.

Once a valid Azure service has been saved, the *Next* button will be enabled and inventory will start.

4.1.27 Office 365

The new added inventory collects data (users, groups and licenses) regarding Office 365.

Some steps are required to collect information from the Office 365 in Docusnap.

Preparations in Azure

This chapter describes the preparation steps to be carried out in Microsoft Azure to perform an inventory with Docusnap.

Proxy for Azure

If your network uses a proxy, you must specify the proxy parameters in the connection settings.

Docusnap Office 365 Inventory

This chapter describes the execution of the inventory.

4.1.27.1 Preparations in Azure

Required Permission

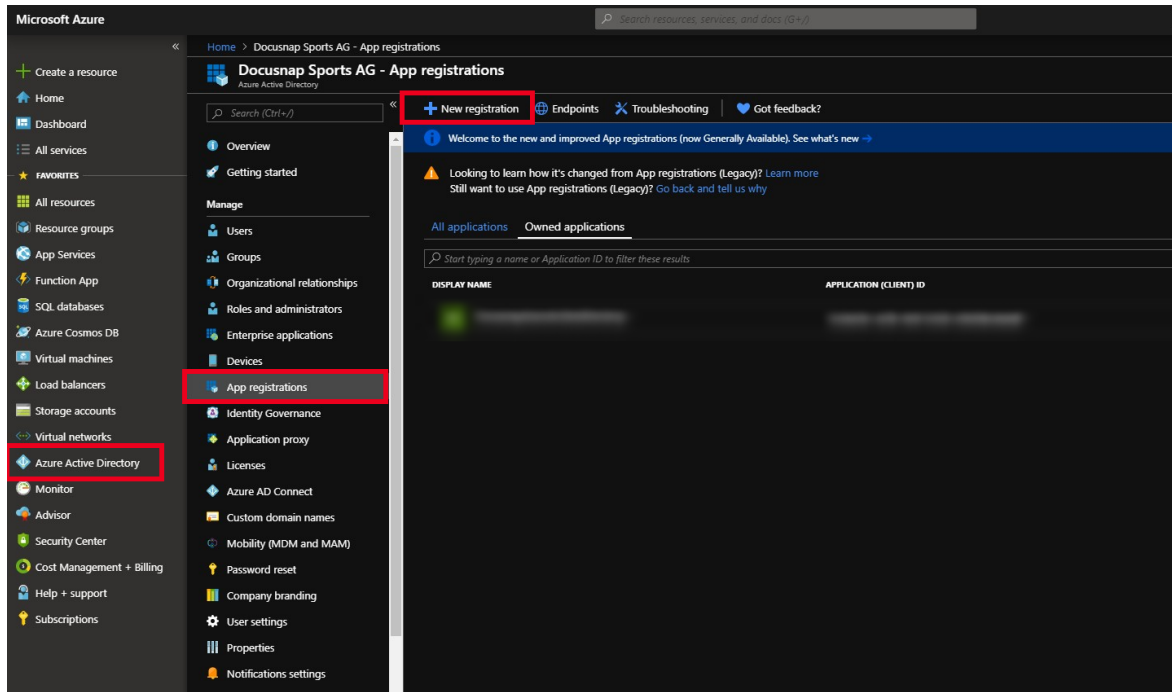
Before you start, make sure that you can log on as an Azure user who has global administrator rights.

Creating the *New Azure Application*

For the *Docusnap Office 365* feature, a registered application is required. This application must have read access to the Microsoft Azure data. This section describes how to create such an application. In our example, the application is called *Docusnap Office 365*. You can choose any name you like, but it is recommended to enter a meaningful name.

Create / register the app as follows:

- Select the *Azure Active Directory* in the resource overview or the search.
- In the *Manage* area, select *App registrations*.
- Click on the menu item *New registration*



Register the application

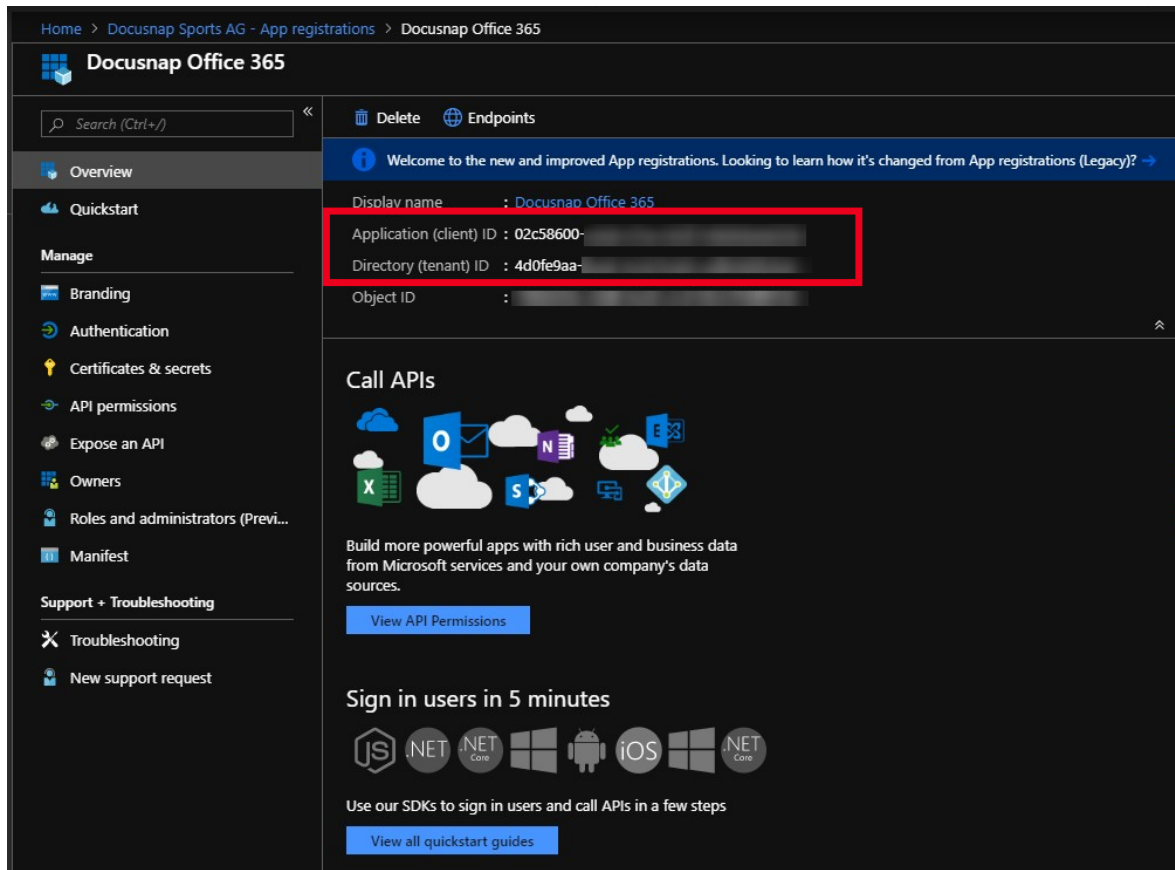
The following information is required to register the application:

- Name: Enter the application name *Docusnap Office 365*.
- Supported account types: Here you can select who can use the application - select *Accounts in this organizational directory only*

The screenshot shows the 'Register an application' form in the Microsoft Azure portal. The form is titled 'Register an application' and is located under 'Docusnap Sports AG - App registrations'. The 'Name' field is filled with 'Docusnap Office 365'. The 'Supported account types' section has 'Accounts in this organizational directory only (Docusnap Sports AG only - Single tenant)' selected. The 'Redirect URI (optional)' section has 'Web' selected and the URI 'https://www.docusnap.com' entered.

Determine Application and Directory ID

After the creation is completed, the overview dialog of the application is displayed. Now copy the application and directory ID and write it down for the Docusnap scan dialog.

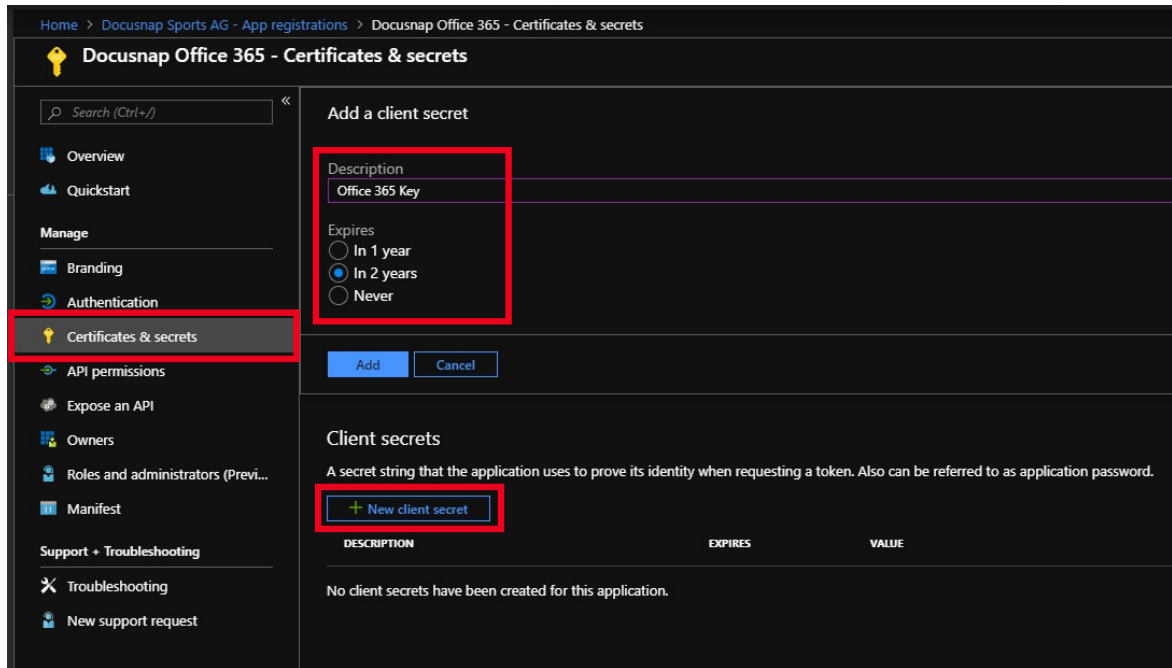


Create a client secret

Now create a client secret. In the *Manage* area, select the item *Certificates & secrets*

- *New client secret*
- Enter a *Description* and
- the *validity* of the secret

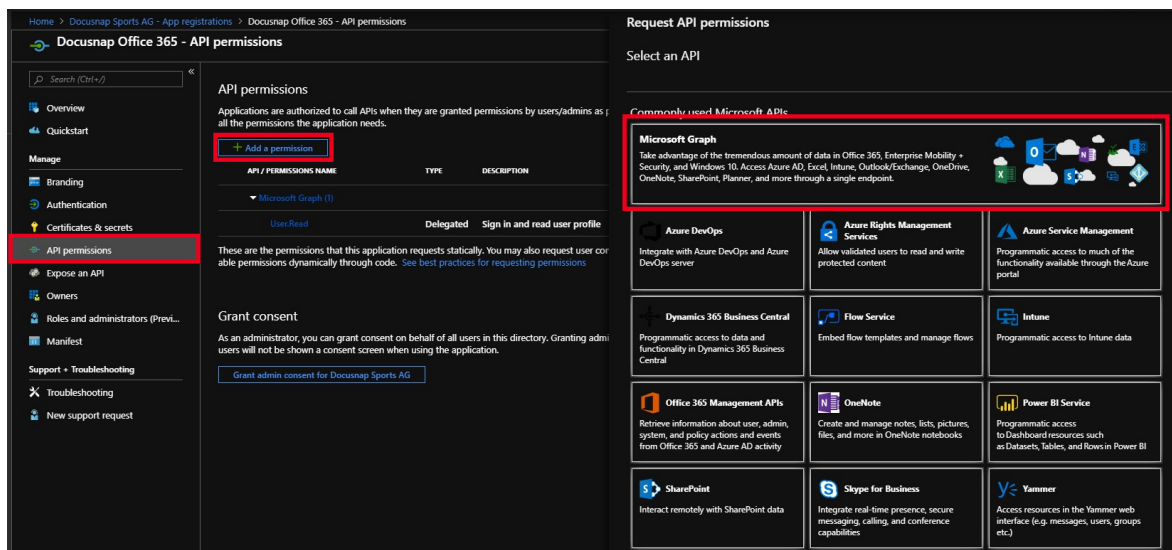
Note: The key can only be viewed directly after creation. If the key is lost or becomes invalid, a new key must be created.



Authorizing the application – API permissions

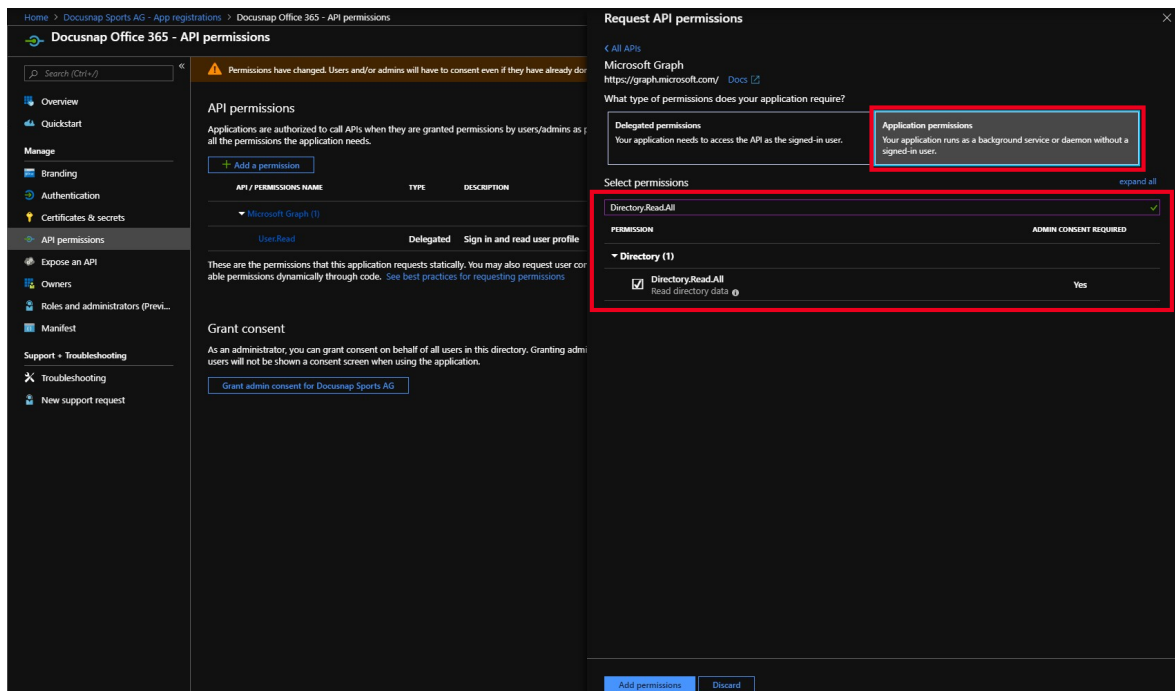
Now the application must be authorized for the *Windows Azure Service Management API*.

- In the *Manage* pane, select *API Permissions*
- *Add a permission*
- *Microsoft Graph*

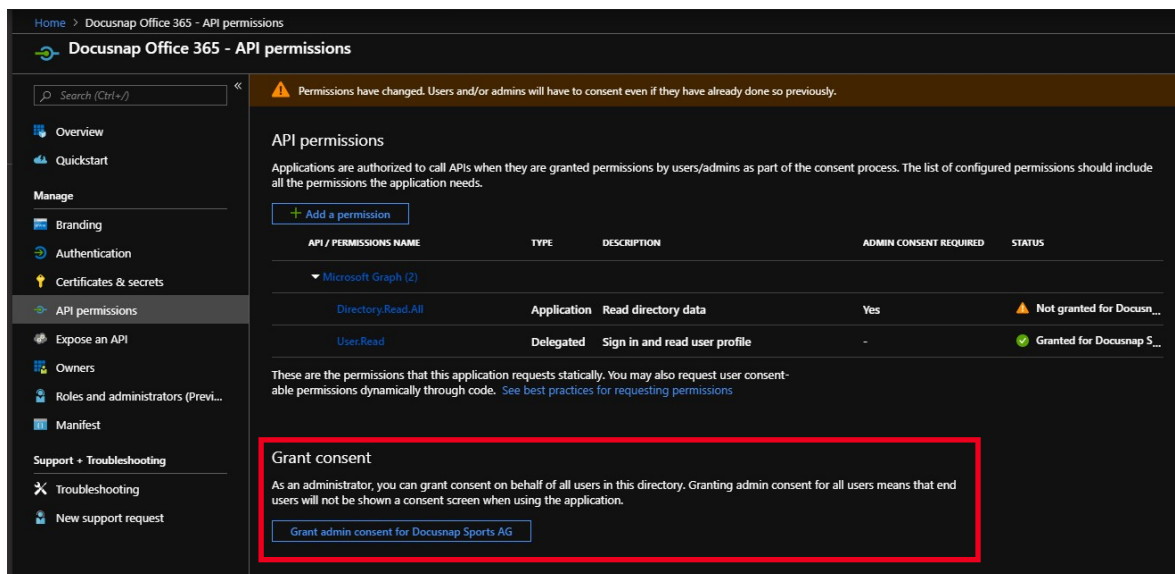


Choose *Application permissions* as the type of permission to be granted.

Use the keyword *Directory* to find the *Directory.Read.All* permission and add this permission.



Now you have to give your consent for the previously set permissions. To do this, select the control *Grant admin consent for "Your subscription"*.



Alternative: PowerShell Script

Alternatively, a PowerShell script can be used to perform the steps described above.

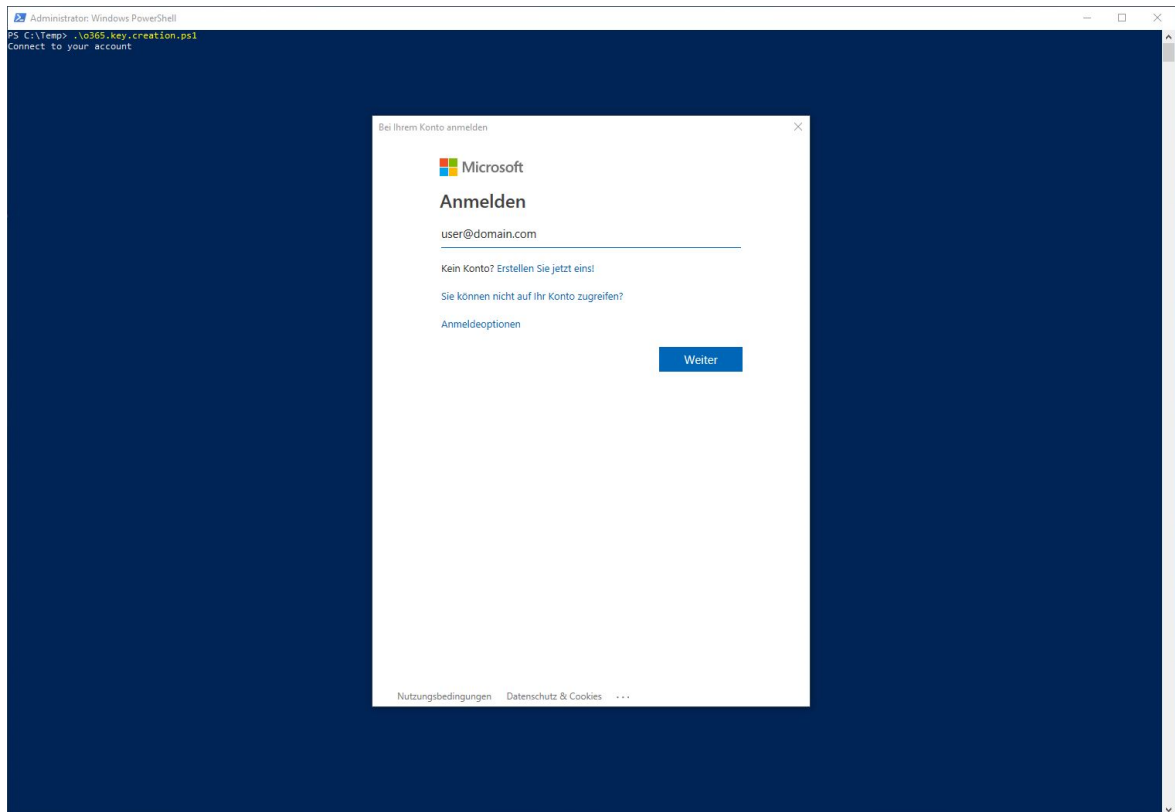
The script is located in the installation directory of Docusnap

C:\Program Files\Docusnap X\Tools\scripts\ o365.key.creation.ps1

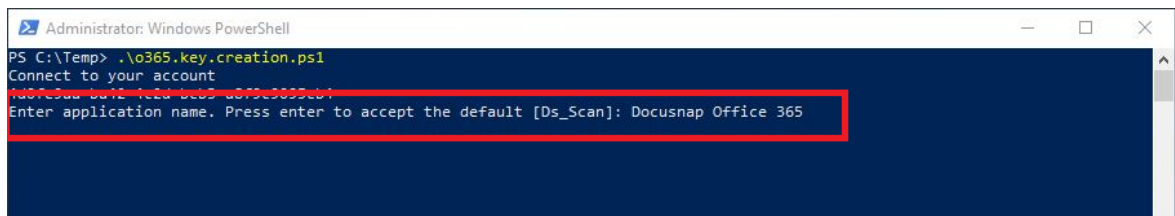
Important: The PowerShell script must be run as an administrator!

- Start PowerShell Script as an administrator

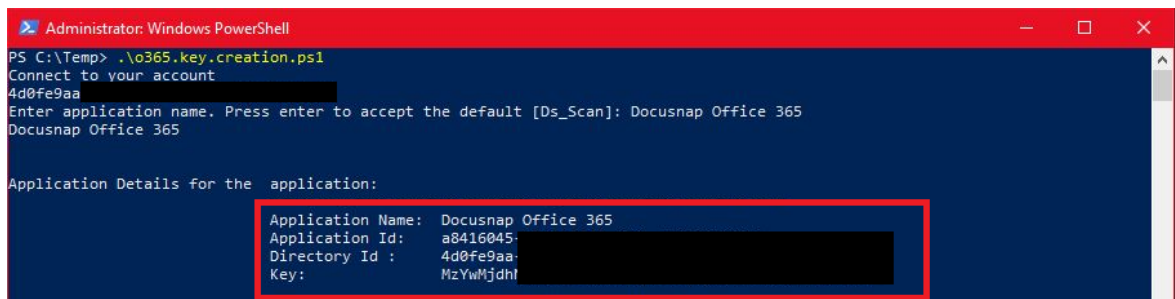
- Reload libraries if necessary and confirm execution dialogs
- Log in in the appearing window



- Assign a name for the application: *DocuSnap Office 365*



- All required information (*Application ID, Directory ID and Key*) is displayed afterwards
- Important - copy the displayed IDs - the key can no longer be found afterwards



- You have to open the displayed URL in the browser - log in and confirm the access

```
Application created successfully

Important: In order for this application to work an administrator has to give consent once initially. Consent can be given at
the following url.

https://login.microsoftonline.com/4d0fe9aa[REDACTED]/adminconsent?client_id=a8416045[REDACTED]
84eb&redirect_uri=https://www.docusnap.com/software/ds10-0/office365-authentication/

Open the above Url in a browser, login using an administrator account and click accept.

Copy the Details printed on screen. You won't be able to see them again. Press Enter to exit.:
```

4.1.27.2 Proxy

If your network uses a proxy, you must specify the proxy parameters in the connection settings. It is possible that you normally do not need these settings when using the other scan modules. Basically, the proxy settings must be suitable for the respective DDS (Docusnap Discovery Service). The settings shown in the exemplary screenshot are suitable for interactive *Office 365* inventory scans. If you selected the Discovery Service of another location as the DDS, you would have to adjust the proxy settings for this DDS installation.

Adjusting the proxy settings:

- For this, the [General options](#) dialog has to be opened
- In the Options dialog, click [Connections](#).
- Under Proxy Settings:
 - select Set up manually
 - Under Address, enter your proxy URL including the Port number
 - Enter suitable values in the User and Password fields
- Click OK to confirm your changes

Options

GENERAL SYSTEM PATHS LICENSING DATABASE CONNECTIONS

Update Options

☐ Check for Updates on Startup

☐ Download both Docusnap Versions (x64 and x86)

Timeout: Seconds

Proxy Settings

☐ Do not Use Proxy ☐ Use System Settings ☒ Set up Manually

Address: Port:

User: Password:

Server API Connection

☒ Enable Server API Connection

URL:

Transport: Timeout: Seconds

4.1.27.3 Office 365 Inventory

To start the wizard for inventorying *Office 365*, click the *Office 365* button. After you have selected a company and a domain (see: [Basic Steps](#)) the *Office 365* step is displayed.

Office 365 Inventory

Now, you need the previously collected IDs and key information that you saved in your text editor.

- The *Directory ID* corresponds to the ID of your Azure Active Directory
- For the *Application ID*, enter the ID of the application you created previously
- In the *Key* field, enter the value of the key you created previously

Inventory

1

2

3

4

5

Company Selection

Domain Selection

Office 365

Summary

Scheduling

☒ Inventory Office 365

Directory ID:

4d0fe9aa

Application ID:

02c58600

Key:

New

Save

Delete

<input checked="" type="checkbox"/>	NAME	DIRECTORY ID
<input checked="" type="checkbox"/>	docusnapsports.com	4d0fe9aa

Information: Completed successfully

Back

Next

Cancel

4.1.28 Amazon Web Services

Docusnap provides the ability to inventory core areas of the AWS infrastructure.

In order to inventory information of the AWS infrastructure with Docusnap, some steps are required.

AWS Environment

This chapter describes what needs to be prepared in the *AWS Identity and Access Management* to be able to perform an inventory with Docusnap.

AWS Inventory

This chapter describes the execution of the inventory.

The core areas that can be scanned are:

- Elastic Compute Cloud (EC2)
- Identity and Access Management (IAM)
- Simple Storage Service (S3)
- Relational Database Services (RDS)
- Batch orders (batch)

4.1.28.1 AWS Environment

This chapter describes what needs to be prepared in the *AWS Identity and Access Management* to be able to perform an inventory with Docusnap.

Within the Inventory Wizard, the following information is required:

- Display Name
- Access Key ID
- Secret Access Key
- Region

Please make sure to use a sufficiently authorized user. This user must be allowed to make the following changes:

- Create policies
- Creating a user and assigning the created guidelines

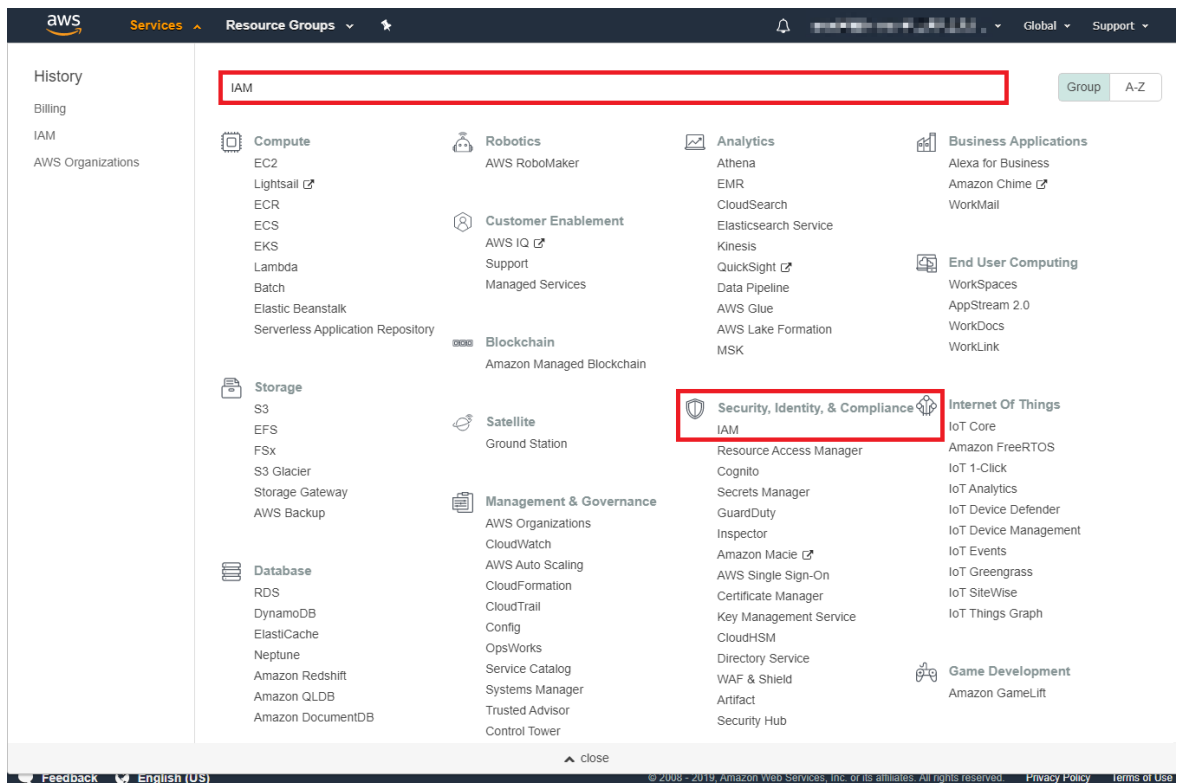


The Amazon Web Services are regionally bound. If you use these services in different regions, you must ensure that a separate user and policies are created for each region.

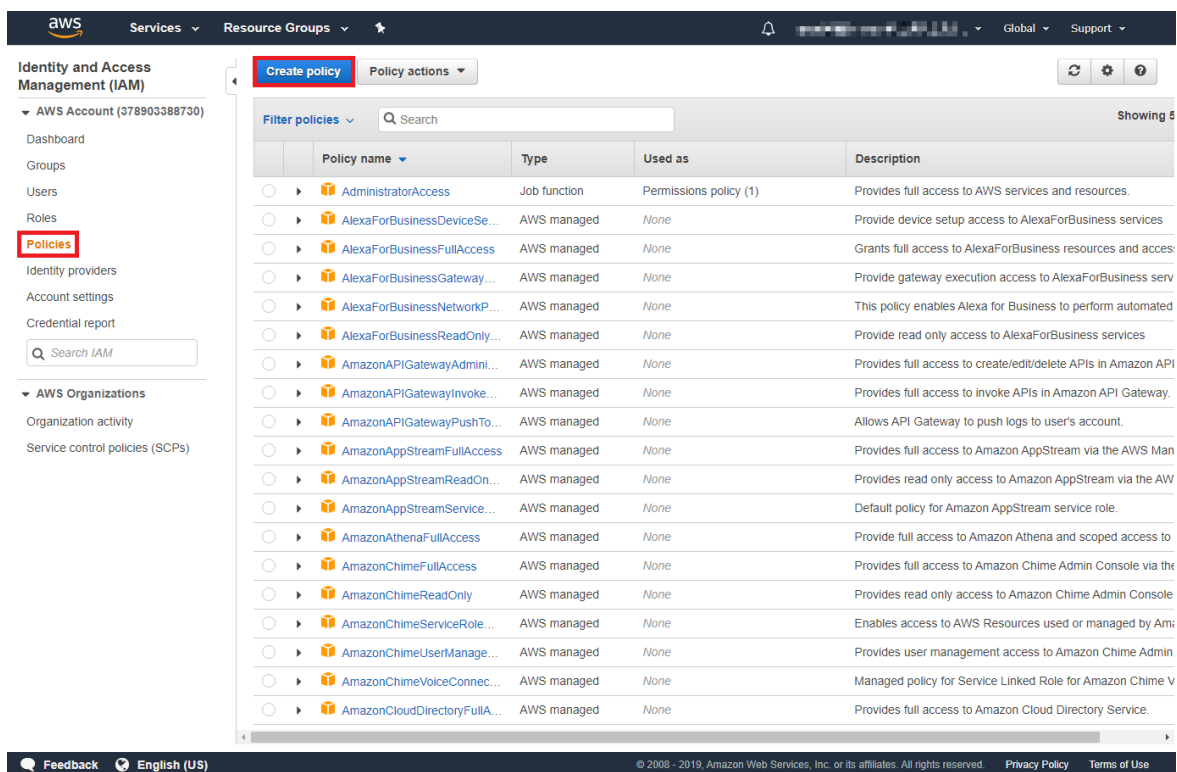
Create policy

This paragraph uses EC2 as an example to describe how to create a dedicated policy for inventorying AWS in Docusnap. This procedure must then be carried out for the other AWS core areas (RDS, S3, IAM and Batch).

Open the services and select *IAM*.



Afterwards, a new policy can be created under *Policies* by clicking the *Create Policy* button.



The *Service*, *Actions* and *Resources* areas are then defined one after the other using the visual editor.

- **Service**
With *Choose a Service*, you then search for the service for which you want to create the policy, in this case *EC2*.
- **Actions**
The actions permitted in EC2 are set at *Access Level List* and *Read*.
- **Resources**
Here it is recommended to authorize the actions via *All resources* of the services.
- **Request conditions**
This item is optional and is not required for a successful inventory.

The screenshot shows the AWS IAM 'Create policy' visual editor. The 'Visual editor' tab is active. The policy is configured for the 'EC2' service. Under 'Actions', the 'Access level' section is expanded, showing 'List (98 selected)' and 'Read (15 selected)' checked. Under 'Resources', 'All resources' is selected. A red rectangle highlights the 'Service', 'Actions', and 'Resources' sections. The 'Request conditions' section is optional and currently empty. The 'Review policy' button is highlighted with a red border.

Check policy

Assign a unique name for the created policy (e.g. *Docusnap_EC2_Inventory*) and an optional description. The configuration is completed via *Create policy*.

aws Services Resource Groups

Create policy

Review policy

Name* Docusnap_EC2_Inventory
Use alphanumeric and '*=@_.' characters. Maximum 128 characters.

Description
Maximum 1000 characters. Use alphanumeric and '*=@_.' characters.

Summary

Filter

Service	Access level	Resource	Request condition
Allow (1 of 200 services) Show remaining 199			
EC2	Full: List, Read	All resources	None

* Required

Cancel Previous **Create policy**

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The previously described steps for creating the policy using the EC2 service as an example must now be repeated for the other services that are to be inventoried with Docusnap.

Configure User

The previously created policies are now assigned to a user. The next step is to select the *User* item in *Services - IAM*.

aws Services Resource Groups

Identity and Access Management (IAM)

Dashboard

Groups

Users

Roles

Policies

Identity providers

Account settings

Credential report

Search IAM

AWS Organizations

Organization activity

Service control policies (SCPs)

Add user Delete user

Search

Showing 0 results

User name	Groups	Access key age	Password age	Last activity	MFA
There are no IAM users. Learn more					

Create User

Use *Add user* to create a new user. A user name and AWS access type are required.

As AWS access type select *Programmatic access*, open the next step via the button *Next: Permissions*.

The screenshot shows the AWS IAM 'Add user' console. The 'Set user details' section has a 'User name' field containing 'DocusnapAWSInventory'. The 'Select AWS access type' section shows 'Programmatic access' selected, which enables an access key ID and secret access key. The 'Next: Permissions' button is highlighted in red.

Define authorizations

Here you have two different possibilities to authorize your user for inventory.

- **Add user to group**
This option can be selected if you want to assign the created policies to a group. However, it is advisable to always carry out the inventory with the same user.
- **Attach existing policies directly**
This option is described in this chapter to bind the pre-created policies directly to a user.

Select *Add existing policies directly* and navigate to the *Filter Policies* option and set the filter to *Customer Managed*. Now select the created policies and add them to this user.



aws

Services

Resource Groups

+

Global

Support

Add user

1

2

3

4

5

Set permissions

Add user to group

Copy permissions from existing user

Attach existing policies directly

Create policy

Filter policies

Showing 5 results

	Policy name	Type	Used as	Description
<input type="checkbox"/>	Docusnap_Batch_I...	Customer managed	None	
<input type="checkbox"/>	Docusnap_EC2_Inv...	Customer managed	None	
<input type="checkbox"/>	Docusnap_IAM_Inv...	Customer managed	None	
<input type="checkbox"/>	Docusnap_RDS_In...	Customer managed	None	
<input type="checkbox"/>	Docusnap_S3_Inv...	Customer managed	None	

Set permissions boundary

Cancel

Previous

Next: Tags

Feedback

English (US)

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Privacy Policy

Terms of Use

The information entered can then be checked again. Click the *Create User* button to create the user.

AWS

Services ▾ Resource Groups ▾ ⚙

🔔 🏠 📄 🗂 📁 📅 📆 📇 📈 📉 📊 📋 📌 📍 📎 📏 📐 📑 📒 📓 📔 📕 📖 📗 📘 📙 📚 📛 📜 📝 📞 📟 📠 📡 📢 📣 📤 📥 📦 📧 📨 📩 📪 📫 📬 📭 📮 📯 📰 📱 📲 📳 📴 📵 📶 📷 📸 📹 📺 📻 📼 📽 📿 📀 📁 📂 📃 📄 📅 📆 📇 📈 📉 📊 📋 📌 📍 📎 📏 📐 📑 📒 📓 📔 📕 📖 📗 📘 📙 📚 📛 📜 📝 📞 📟 📠 📡 📢 📣 📤 📥 📦 📧 📨 📩 📪 📫 📬 📭 📮 📯 📰 📱 📲 📳 📴 📵 📶 📷 📸 📹 📺 📻 📼 📽 📿 📀

Add user

1 2 3 4 5

Review

Review your choices. After you create the user, you can view and download the autogenerated password and access key.

User details

User name DocusnapAWSInventory

AWS access type Programmatic access - with an access key

Permissions boundary Permissions boundary is not set

Permissions summary

The following policies will be attached to the user shown above.

Type	Name
Managed policy	Docusnap_Batch_Inventory
Managed policy	Docusnap_EC2_Inventory
Managed policy	Docusnap_IAM_Inventory
Managed policy	Docusnap_RDS_Inventory
Managed policy	Docusnap_S3_Inventory

Tags

No tags were added.

Cancel Previous Create user

Receive User Keys for Inventory

Important: The final data created (user, access key ID and secret access key) are required for the inventory in Docusnap and can be downloaded as CSV. These can only be viewed once after configuration!

The screenshot shows the AWS IAM 'Add user' wizard. At the top, there's a navigation bar with 'aws', 'Services', 'Resource Groups', and a search icon. Below the navigation bar, the title 'Add user' is followed by a progress indicator with five steps, where step 5 is selected. A green success message box states: 'Success. You successfully created the users shown below. You can view and download user security credentials. You can also email users instructions for signing in to the AWS Management Console. This is the last time these credentials will be available to download. However, you can create new credentials at any time. Users with AWS Management Console access can sign-in at: <https://378903388730.signin.aws.amazon.com/console>'. Below the message, there is a 'Download .csv' button. Underneath, a table lists the created users. The table has three columns: 'User', 'Access key ID', and 'Secret access key'. One user is listed: 'DocusnapAWSInventory'. The 'Access key ID' is masked with dots, and the 'Secret access key' is masked with asterisks and has a 'Show' link. At the bottom right of the table, there is a 'Close' button. The footer of the page includes 'Feedback', 'English (US)', copyright information '© 2008 - 2019, Amazon Web Services, Inc. or its affiliates. All rights reserved.', 'Privacy Policy', and 'Terms of Use'.

User	Access key ID	Secret access key
▶ DocusnapAWSInventory	***** Show

4.1.28.2 AWS Inventory

The created user is now used in combination with the created keys to perform the inventory in Docusnap.

To start the wizard for inventorying *AWS*, click the *Amazon Web Services* button. After you have selected a company and a domain (see: [Basic Steps](#)) the *Amazon Web Services* step is displayed.

Any name can be assigned as the *Display Name*. The values for *Access Key ID* and *Secret Access Key* are the keys previously defined for the user. The region is the region in which the desired data and the user are located.



Inventory

1

2

3

4

5

Company Selection

Domain Selection

Amazon Web Services

Summary

Scheduling

☒ Inventory Amazon Web Services

Display Name:

DocusnapAWSInventory

Access Key ID:

XXXXXXXXXXXXXXXXXXXXXXXXXXXX

Secret Access Key:

XXXXXXXXXXXXXXXXXXXXXXXXXXXX

Region:

EU (Frankfurt)

New

Save

Delete

☒

DISPLAY NAME

REGION

☒ AWS

DocusnapAWSInventory

eu-central-1

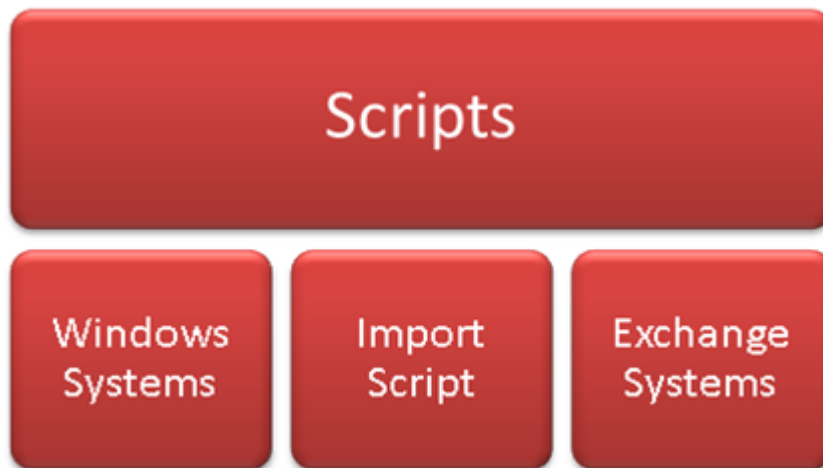
Information: Completed successfully

Back

Next

Cancel

4.2 Scripting



Windows Systems

Docusnap provides the *DocusnapScript.exe* executable as an alternative method to scan Windows systems. For example, in a company which employs field staff, the chances of a successful inventory with Docusnap are minimal. In this situation, the *DocusnapScript.exe* file may prove helpful: Next time the corresponding user logs on to the domain, *DocusnapScript.exe* will be executed using the login script.

Import Scripts

Using the wizard for importing script files, you can import files that have been created by executing the `DocusnapScript.exe`.

Exchange Systems

To inventory Exchange servers, you can use the separate *DocusnapExchange.exe* script as an alternative to scanning them with Docusnap. The retrieved data can subsequently be imported into Docusnap.

Linux

Linux devices can be inventoried with a script that is executed on that device. Subsequently, this file can be imported into Docusnap.

4.2.1 Windows

After a Windows system has been scanned, `DocusnapScript.exe` will generate an XML file that contains all collected data. You can later import this XML file manually to Docusnap or have it imported by the Docusnap Server automatically.

During the installation of Docusnap, `DocusnapScript.exe` will be stored in the *Tools* folder of the application directory. To execute *DocusnapScript.exe*, no additional files are required.

Parameters:

- **C:** Sets the name of the workstation.
- **D:** Sets the name of the domain where the system to be scanned is located.
- **H:** Opens the help screen.
- **L:** Sets the debug level to be used during the inventory scan.

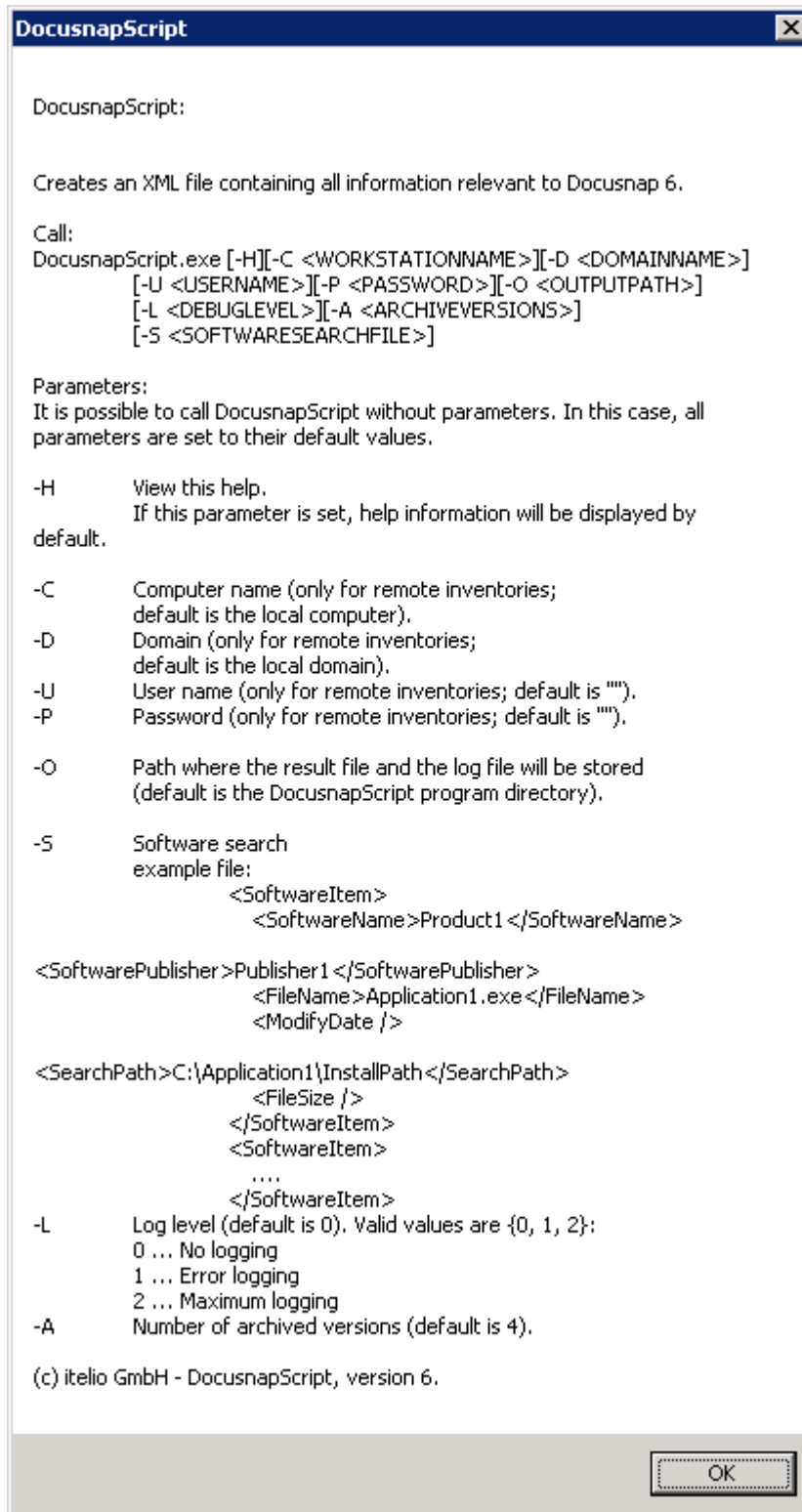
The following debug levels are available:

1: Errors and function calls will be logged.

2: The entire program flow will be logged.

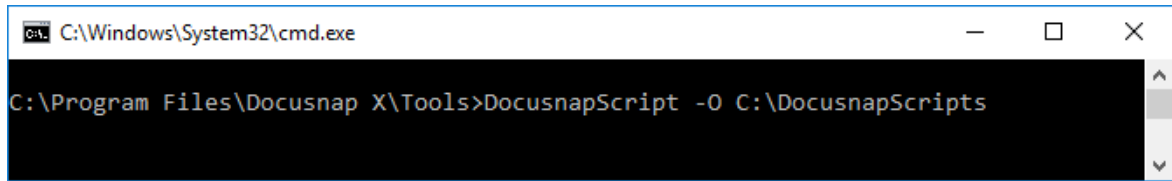
- **O:** Sets the path where to generate the XML file. If the process creates a log file, it will be stored in this path.





Examples:

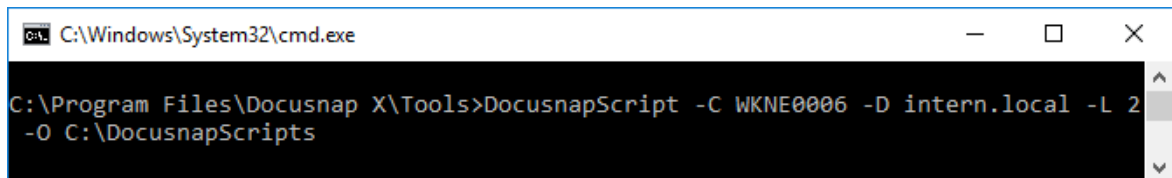
If you run the script on the system you want to inventory, no additional parameters are required. You can specify the location of the XML file using the -O parameter.



```
C:\Windows\System32\cmd.exe

C:\Program Files\Docusnap X\Tools>DocusnapScript -O C:\DocusnapScripts
```

If you intend to use the script for an inventory scan of a remote system, you can specify the system to be scanned using the **-C** and **-D** parameters.



```
C:\Windows\System32\cmd.exe

C:\Program Files\Docusnap X\Tools>DocusnapScript -C WKNE0006 -D intern.local -L 2
-O C:\DocusnapScripts
```

This command will scan the **WKNE0006** workstation in the **intern.local** domain using debug level **2**. The XML file will be stored in the **C:\DocusnapScripts** directory.

Software Search

The Docusnap Software Search feature enables you to inventory software products that cannot be scanned through the Windows inventory process. You can include a Software Search command in the Docusnap script. To use the Software Search feature, you need to create an XML software list manually.

The XML file must have the following structure:

```
<SoftwareItem>
<SoftwareName>My New Software 1</SoftwareName>
<SoftwarePublisher>Microsoft</SoftwarePublisher> <!-- optional-->
<SoftwareVersion>1.0 Beta</SoftwareVersion> <!-- optional-->
<FileName>notepad.exe</FileName>
<SearchPath>C:\Windows</SearchPath>
<FileSize>193536</FileSize> <!-- optional byte-->
<ModifyDate>01.01.2016</ModifyDate> <!-- optional-->
</SoftwareItem>
```

Make sure to specify the filename correctly or use a wildcard character (?,*).

```
<SoftwareItem>
<SoftwareName>My New Software 1</SoftwareName>
<SoftwarePublisher /> <!-- optional-->
<SoftwareVersion /> <!-- optional-->
<FileName>notepad.exe</FileName>
<SearchPath>C:\Windows</SearchPath>
<FileSize /> <!-- optional byte-->
<ModifyDate /> <!-- optional-->
</SoftwareItem>
```

If one of the optional parameters is not specified, use the notation shown in the example to the left (<SoftwarePublisher />).

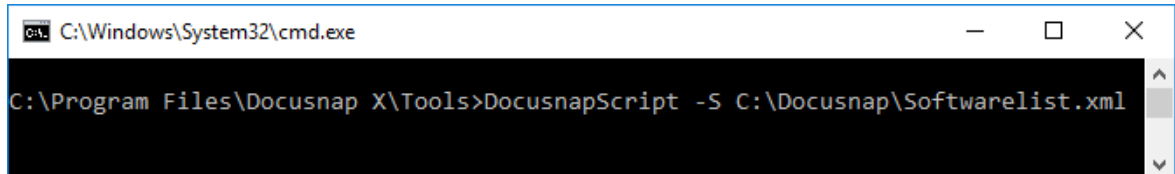
If you specify a wrong file size, the desired



software will not
be scanned!

To use the software list in the DocusnapScript, use the following command:

DocusnapScript.exe -S <path\><filename.xml>



```
C:\Windows\System32\cmd.exe
C:\Program Files\Docusnap X\Tools>DocusnapScript -S C:\Docusnap\SoftwareList.xml
```

If a defined software product is found during the execution of the script, its data will be stored in the results XML file. When you import the XML file into Docusnap, this data will be imported as well.

Additional Tools

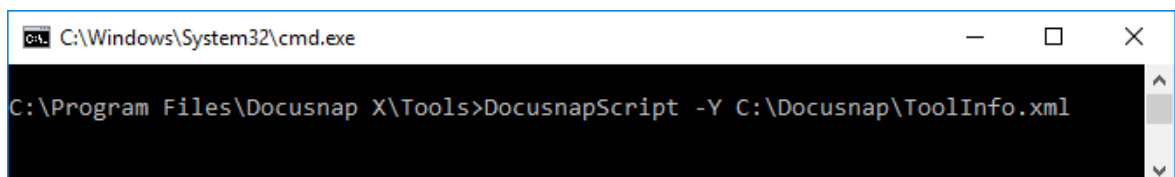
Through the use of additional tools, further information about a Windows system can be captured during the inventory. The execution of the additional tool can also be started as part of the Docusnap script. To execute the additional tool, an XML file with the required information must be created.

The XML file must have the following structure:

```
<ToolInfo>
  <Url>systeminfo.exe</Url>
  <Parameters> </Parameters>
  <ResultFile>systeminfo.txt</ResultFile>
  <OpenWith>notepad.exe</OpenWith>
  <Description>Systeminfo</Description>
  <ToolType>0</ToolType>
  <Timeout>10000</Timeout>
  <ExecuteRemote>>false</ExecuteRemote>
</ToolInfo>
```

To execute the additional tools in DocusnapScript, use the following command:

DocusnapScript.exe -Y <path\><filename.xml>



```
C:\Windows\System32\cmd.exe
C:\Program Files\Docusnap X\Tools>DocusnapScript -Y C:\Docusnap\ToolInfo.xml
```

Data collected during the execution of additional tools as part of the script, is stored in the result XML file. By importing the XML file into Docusnap, this data will be imported as well.

4.2.2 Linux

In addition to the Inventory wizard, Linux devices can also be inventoried by using a script. Depending on whether the target operating system is 32 bit or 64 bit the `DSLlinux_x32` or the `DSLlinux_x64` is used. You can find these files in the *Bin* folder of the application directory. When executing the script the parameter `-f` must be specified, so that the file is created. The file is saved with the name `DS_%HostName%_%Date%_%Time%.xml` as `DS_WMLX0007_20151120_141314.xml`.

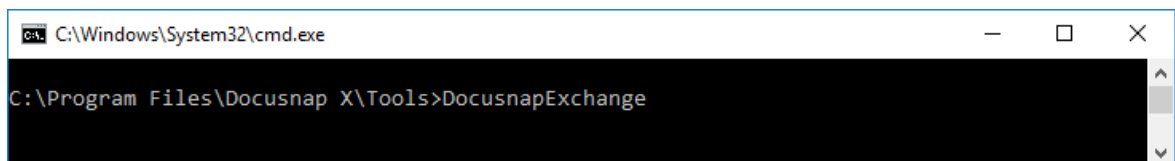
Subsequently, this file can be imported through the [Docusnap Import](#) wizard in Docusnap.

4.2.3 Exchange

DocusnapExchange.exe provides three ways to inventory an Exchange server. Always run the file on the very system that you want to scan. During the installation of Docusnap, the *DocusnapExchange.exe* script is stored in the *Tools* folder of the application directory.

- Local:

The *DocusnapExchange.exe* script can be executed either by double-clicking its name or entering its name in the command line. All information is inventoried, except the extended information of the AD authorizations. When the inventory is done, an XML file is created in the folder where the *DocusnapExchange.exe* file is located. This XML file contains all retrieved data.



- Default:

The second option allows you to select the information to be retrieved. To do so, specify 'true' or 'false' for the following arguments. If an argument is not specified, the relevant information is not inventoried.

-mb = Retrieve mailboxes

The *permissions for the mailboxes*, the *mailbox folders* and the *AD permissions for mailboxes* can only be retrieved if the mailboxes are inventoried (-mb true).

- mbp = Retrieve permissions for mailboxes

- mbf = Scan mailbox folders

- mbsp = AD permissions (Send As,...) for mailboxes

-pf = Retrieve public folders

The *permissions for the public folders* can only be retrieved if the public folders are inventoried (-pf true).

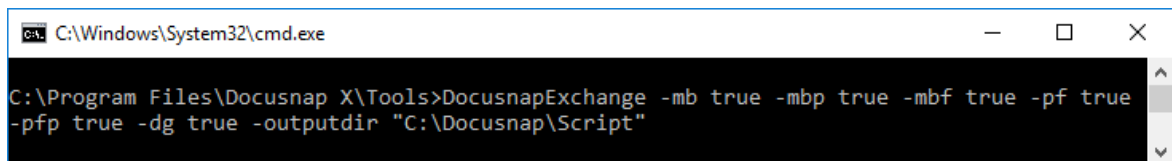
- pfp = Retrieve permissions for public folders

-mct = Scan contacts

- dg = Retrieve distribution groups
- mics = Retrieve other information (Certificates,...)
- ext = Retrieve extended information (AD permissions)

Additional specifications are also possible..

- threads = how many threads should be used. If no value is specified for the threads, 4 threads are used.
- outputdir = in which folder should the files be saved. If no folder is specified, the file will be saved in the same folder where the DocusnapExchange.exe is located.



```
C:\Windows\System32\cmd.exe
C:\Program Files\Docusnap X\Tools>DocusnapExchange -mb true -mbp true -mbf true -pf true
-pfp true -dg true -outputdir "C:\Docusnap\Script"
```

Legacy:

For the last option, you need to additionally specify the server name and the Exchange version as the first and second arguments. This option already existed in previous Docusnap versions and has been retained for users who integrated this option into their processes.

Argument 1 = Exchange server name

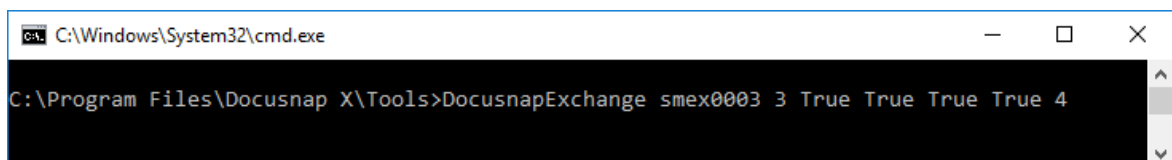
Argument 2 = Exchange version

Argument 3 = Retrieve permissions for mailboxes

Argument 4 = Scan mailbox folders

Argument 5 = Retrieve permissions for public folders

Argument 6 = Retrieve special permissions for mailboxes



```
C:\Windows\System32\cmd.exe
C:\Program Files\Docusnap X\Tools>DocusnapExchange smex0003 3 True True True True 4
```

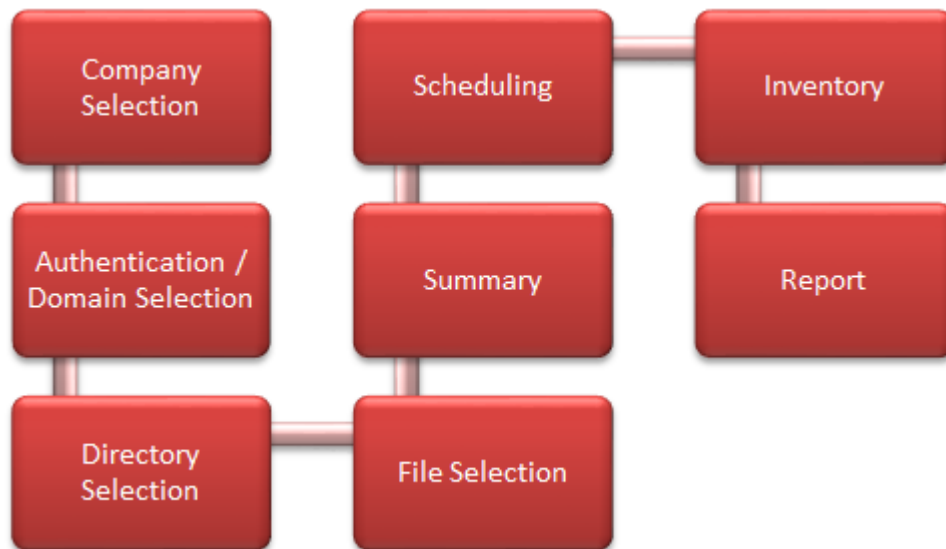


The Default option yields the same result as Legacy, but without requiring additional information on the server name or Exchange version. Therefore, it is recommended to use the Local or the Default option.

The files created here can then be imported with the [Script Import](#) process. Before importing the XML file, at least one Exchange inventory must exist, so that the data of the Exchange server can be assigned.

4.2.4 Import Scripts

Using the wizard for importing script files, you can import files that have been created by executing the DocusnapScript.exe or *DocusnapExchange.exe*.



Click the *From Docusnap Script.exe* button on the *Other Sources* Button of the *Inventory* ribbon to open the *Import Data* wizard. The *Directory Selection* step will be displayed after you have selected a company and a domain (see: [Basic Steps](#)).



When the *DocusnapExchange.exe* is executed, the data of the respective Exchange server is scanned. Before importing the XML file, at least one Exchange inventory must exist. During the import the data of the server is assigned to the current Exchange inventory.

To import xml files, two steps are necessary in the *Import Data* wizard:

- In the *Directory Selection* step, define the location for storing the XML files.

Import Data

1 2 3 4 ...

Company Selection Domain Selection **Directory Selection** File Selection Steps 5-6

Add Directory

Search Path: C:\Docusnap\Skrift ... [Add](#)

Directory Selection

<input checked="" type="checkbox"/>	PATH
<input checked="" type="checkbox"/>	C:\Docusnap\Skrift

Note: The selected Discovery Service must have access to the selected directories.

[Back](#) [Next](#) [Cancel](#)

- In the *File Selection* step, select the files to be imported.

Import Data

... 3 4 5 6

Steps 1-2 Directory Selection **File Selection** Summary Scheduling

Select Import File

[Start searching for files](#)

<input checked="" type="checkbox"/>	NAME	FILE NAME	VERSION	DATE
<input checked="" type="checkbox"/>	SMEX0003	C:\Docusnap\Script\SMEX0003.xml	Version 14.1 (B...	11/17/2016 4:15:55 ...
<input checked="" type="checkbox"/>	WKNE2007	C:\Docusnap\Script\WKNE2007_IN...	10.0.476.1	11/24/2016 3:47:34 ...

[Back](#) [Next](#) [Cancel](#)

4.3 Communication Paths

Each system in a network provides various applications and services or accesses them. If there are many applications, services and systems in an environment, there is no chance of evaluating relations and dependencies without software support.

For Windows and Linux systems, Docusnap captures the open TCP/UDP ports and existing connections to or from other systems during the inventory process. With each inventory scan, Docusnap expands and adds to this information, building an extensive connection diagram for the network over time.

The inventoried data is displayed under the heading *Connections* in the *Inventory* hierarchy.

PROTOCOL	SOURCE PORT	TARGET IP ADDR...	TARGET SYST...	TARGET P...	STATE	OWNER SID	IP VERSION	FIRST TIME STAMP	LAST TIME STAMP
UDP	137	*	*		None		IPv4	12.09.2016 15:25:37	11.01.2017 13:38:05
UDP	137	*	*		None		IPv4	12.09.2016 15:25:37	11.01.2017 13:38:05
TCP	58510	172.31.251.10	DSDC01	49158	Established	Local System	IPv4	12.09.2016 15:25:37	12.09.2016 15:25:37
TCP	58501	172.31.251.10	DSDC01	49155	Established	Local System	IPv4	12.09.2016 15:25:37	12.09.2016 15:25:37
TCP	58500	172.31.251.10	DSDC01	135	Established	Local System	IPv4	12.09.2016 15:25:37	12.09.2016 15:25:37
TCP	58514	172.31.251.10	DSDC01	445	Established		IPv4	12.09.2016 15:25:37	12.09.2016 15:25:37
TCP	58666	172.31.251.10	DSDC01	135	Time_Wait		IPv4	11.01.2017 13:38:05	11.01.2017 13:38:05
TCP	58675	172.31.251.10	DSDC01	135	Established	Local System	IPv4	11.01.2017 13:38:05	11.01.2017 13:38:05
TCP	58676	172.31.251.10	DSDC01	49156	Established	Local System	IPv4	11.01.2017 13:38:05	11.01.2017 13:38:05
TCP	52365	172.31.251.10	DSDC01	55382	Established	Local System	IPv4	11.01.2017 13:38:05	11.01.2017 13:38:05
TCP	52352	172.31.251.10	DSDC01	10000	Established	DSRA\dsraBCK	IPv4	11.01.2017 13:38:05	11.01.2017 13:38:05
TCP	58680	172.31.251.10	DSDC01	49158	Established	Local System	IPv4	11.01.2017 13:38:05	11.01.2017 13:38:05
TCP	58667	172.31.251.15		135	Time_Wait		IPv4	11.01.2017 13:38:05	11.01.2017 13:38:05
TCP	56847	172.31.251.17	DSSP01	445	Established		IPv4	12.09.2016 15:25:37	12.09.2016 15:25:37
TCP	58458	172.31.251.17	DSSP01	6167	Time_Wait		IPv4	12.09.2016 15:25:37	12.09.2016 15:25:37
TCP	58475	172.31.251.22	DSBK01	2501	Established	Local System	IPv4	12.09.2016 15:25:37	12.09.2016 15:25:37
TCP	58474	172.31.251.22	DSBK01	2501	Established	Local System	IPv4	12.09.2016 15:25:37	12.09.2016 15:25:37
TCP	58472	172.31.251.22	DSBK01	6162	Established	Local System	IPv4	12.09.2016 15:25:37	12.09.2016 15:25:37
TCP	58470	172.31.251.22	DSBK01	6160	Established	Local System	IPv4	12.09.2016 15:25:37	12.09.2016 15:25:37
TCP	58469	172.31.251.22	DSBK01	6160	Time_Wait		IPv4	12.09.2016 15:25:37	12.09.2016 15:25:37

A second view is below the heading *Communication* on the company level. In this view the corresponding systems are listed for all services, processes and applications.



Visualization

DocuSnap X

DocuSnap INVENTORY DOCUMENTS SCHEDULING EXTRAS REPORTING

Save

Open

Edit

Send

Refresh

Search

Print

One Page

Thumbnail View

Report Designer

Two Pages

Bookmark

Schedule as Job

General

Edit

View

Other

New

Save

Delete

Overview

DocuSnap AG

Infrastructure

dsra.local

Workstations

Servers

DSBK01

DSDC01

DSEX01

DSF501

DSF502

Connections

11.01.2017 13:37:49

08.09.2016 11:01:31

Documentation

Communication

Communication

DSSP01

DSSP02

Linux

Mac

SNMP Systems

Thin Clients

HP-LUX

CIFS

Virtualization

IP Systems

ADS

Network Services

Application Servers

Database Server

Storage

Subsystems

Reports

itello

Communication

DSF502

Connections

System	Port	Process	Protocol
+		System	UDP
172.31.251.11		DYNAMIC Microsoft® Windows® Operating System dfrs.exe	TCP
172.31.251.18		DYNAMIC Microsoft SQL Server sqlservr.exe	TCP
172.31.251.18		DYNAMIC BetreueSystem Microsoft® Windows® System dfrs.exe	TCP
172.31.251.18		DYNAMIC Microsoft SQL Server sqlservr.exe	TCP
WINHE2200 192.168.100.116	443	System	TCP
WINHE2200 192.168.100.116	DYNAMIC	BetreueSystem Microsoft® Windows® System dfrs.exe	TCP
WINHE2200 192.168.100.116	443	System	TCP
WINHE2200 192.168.100.116	DYNAMIC	BetreueSystem Microsoft® Windows® System dfrs.exe	TCP

Local Connections

System	Port	Process	Protocol
DSF502 172.31.251.12		DYNAMIC Microsoft SQL Server sqlservr.exe	TCP
DSF502 172.31.251.12		DYNAMIC Microsoft SQL Server sqlservr.exe	TCP
DSF502 172.31.251.12		DYNAMIC Microsoft SQL Server sqlservr.exe	TCP
DSF502 172.31.251.12		DYNAMIC Microsoft SQL Server sqlservr.exe	TCP

Bidirectional Connections

System	Port	Process	Protocol	System	Port	Process	Protocol
DSF502 172.31.251.12	DYNAMIC	System	TCP	DSDC01 172.31.251.10	DYNAMIC	System	TCP
DSF502 172.31.251.12	DYNAMIC	System	TCP	DSDC01 172.31.251.10	DYNAMIC	Microsoft® Windows® Operating System dfrs.exe	TCP
DSF502 172.31.251.12	DYNAMIC	System	TCP	DSDC01 172.31.251.10	DYNAMIC	Microsoft® Windows® Operating System dfrs.exe	TCP
DSF502 172.31.251.12	DYNAMIC	System	TCP	DSDC01 172.31.251.10	DYNAMIC	BetreueSystem Microsoft® Windows® System dfrs.exe	TCP
DSF502 172.31.251.12	DYNAMIC	Microsoft® Windows® Operating System dfrs.exe	TCP	DSDC01 172.31.251.10	DYNAMIC	Microsoft® Windows® Operating System dfrs.exe	TCP
DSF502 172.31.251.12	DYNAMIC	Microsoft® Windows® Operating System dfrs.exe	TCP	DSDC01 172.31.251.10	DYNAMIC	System	TCP
DSF502 172.31.251.12	DYNAMIC	Microsoft® Windows® Operating System dfrs.exe	TCP	DSDC01 172.31.251.10	DYNAMIC	BetreueSystem Microsoft® Windows® System dfrs.exe	TCP
DSF502 172.31.251.12	DYNAMIC	Microsoft® Windows® Operating System dfrs.exe	TCP	DSDC01 172.31.251.10	DYNAMIC	Microsoft® Windows® Operating System dfrs.exe	TCP

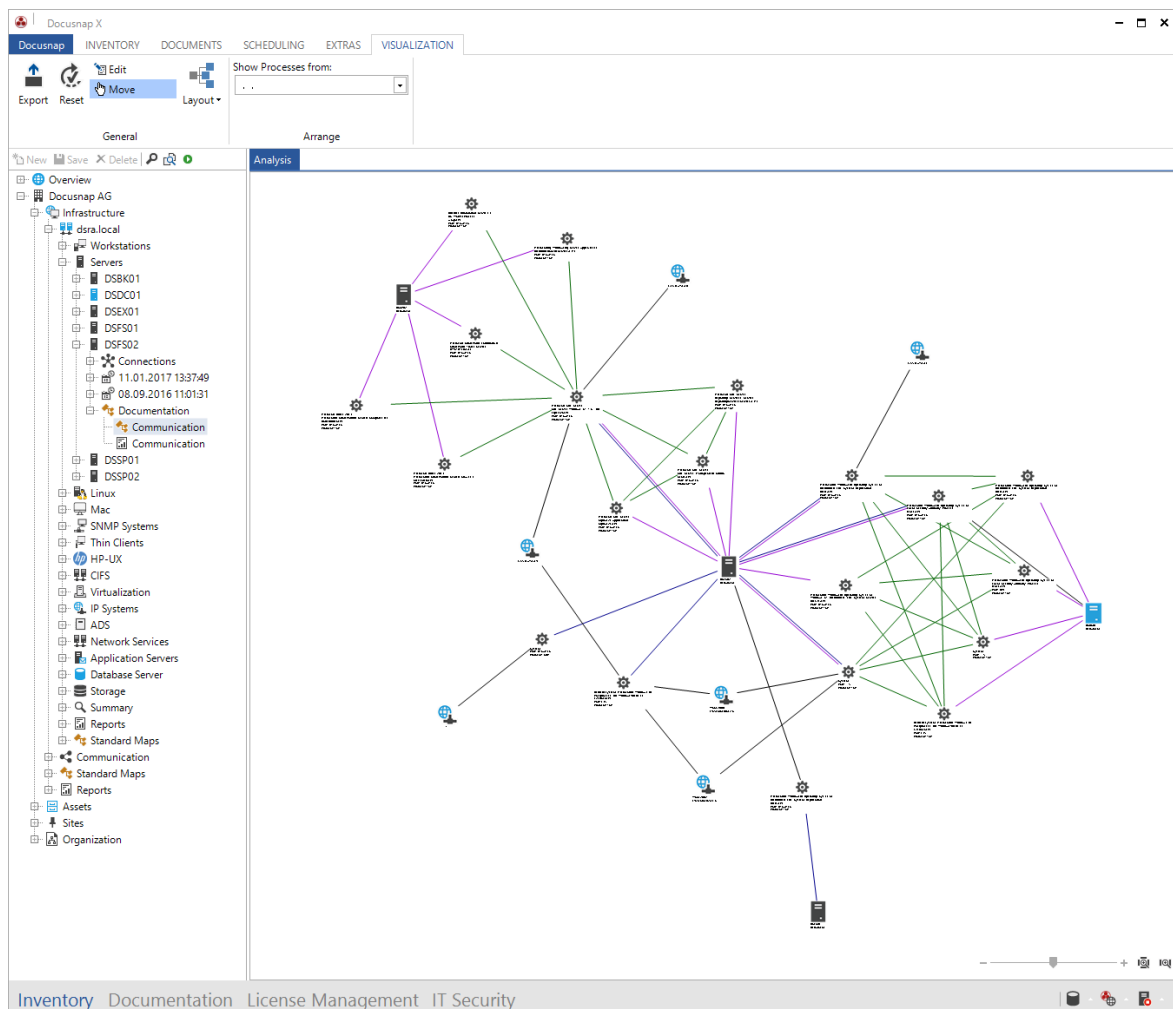
DocuSnap

DSF502

Page 2 of 2

- Completely known communication path: Source System to Service - Service to Target System
 - Source System to Service = Violet
 - Service to Service = Green
- "One-way" known communication path: Source System to Service to Target System
 - Source System to Service = Blue
 - Service to Target System = Black

Inventory also stores the date on which the connection was inventoried. In the *Show Processes from* field, you can select a date from which connections should be displayed in the map.



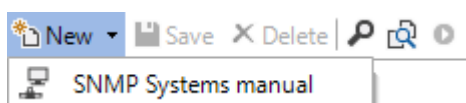
4.4 Manually Create Systems

If you wish to include systems that cannot be scanned by the automated inventory process or by the Docusnap Script, you can enter the required information

manually. When all necessary data has been entered, the manually created systems are also considered in maps. The manual systems can be integrated into [system groups](#). If software has been created for the system, for which a license was created in the [license management](#), these devices are also considered in the license balance. The data sheets of the [documentation](#) can also be created for the manual device.

Create Systems

Below the heading *Assets - Systems* in the *Inventory* tree all domains are displayed. Below each domain, the heading for *Windows Systems*, *Linux Systems*, *Mac Systems*, *SNMP Systems* and *CIFS* are displayed to create the respective systems. For example, to create a firewall, select the headline *SNMP Systems* and click the *New* button.



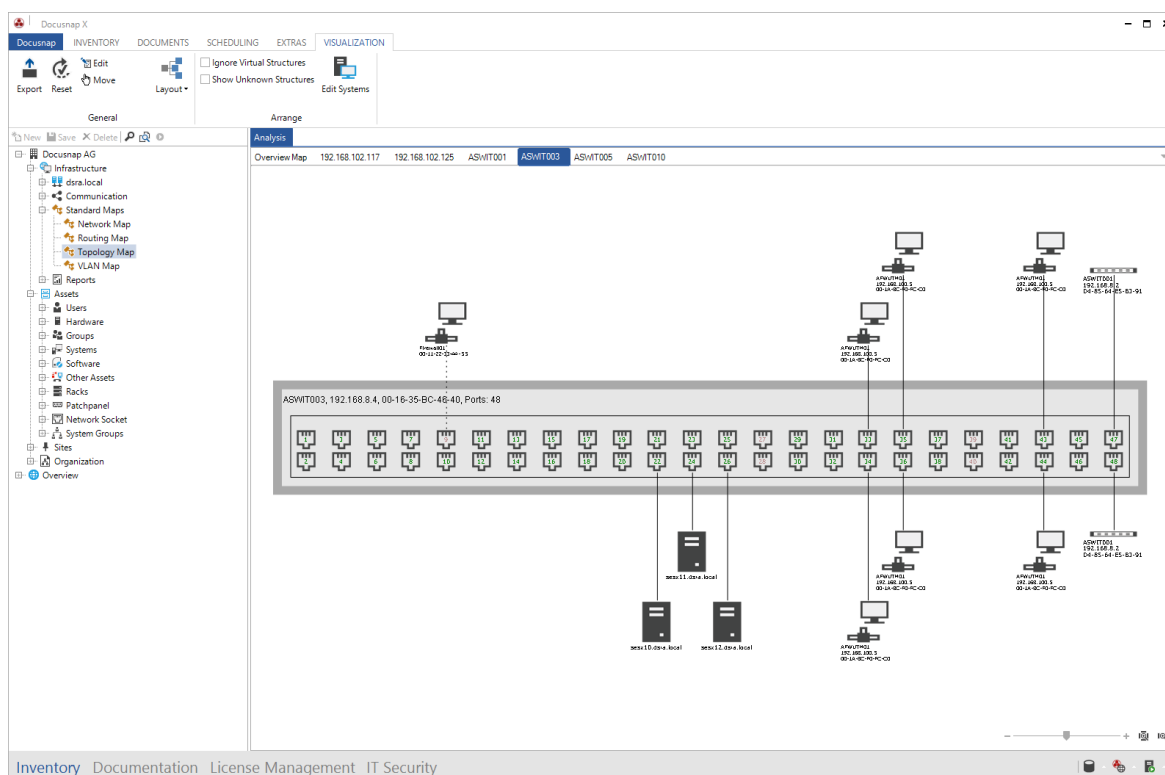
Once you have selected the object type to be created, the associated data entry screen will be displayed. After you have entered all required information, click the *Save* button to save your data. To delete entries that are no longer needed, click the *Delete* button.

 A screenshot of the 'New' dialog box in the 'Inventory' application. The dialog is titled 'New' and has tabs for 'General', 'Data', 'Analysis', and 'Additional Information'. The 'General' tab is active, showing fields for 'Host Name' (Firewall01), 'MAC Address' (00-11-22-33-44-55), 'SNMP Type' (Firewall), 'Inventory Number' (01122), and 'Description'. There are also checkboxes for 'Exclude from License Management' and 'Assigned User'. The 'Site' dropdown is set to 'Munich'. The 'Rack' dropdown is set to '<No Selection>'. The 'Number of Height Units' is set to 10. The 'Data' tab is also visible, showing fields for 'IP Address', 'Subnet Mask', and 'Gateway'. The 'Additional Information' tab is also visible, showing fields for 'Manufacturer', 'Model', and 'Serial Number'. The 'General' tab is currently selected, and the 'Host Name' field is highlighted.


In order for the manual systems (Windows, Linux, Mac and CIFS) to be included in the maps, the IP address, subnet mask and MAC addresses of the devices must be specified. For that add a creation date and then general data beneath the system. The network

information of the device can then be entered under the heading *Network*. These are needed so the systems are inserted at the correct position in the maps.

SNMP systems need no further information besides the entry directly below the heading. These are considered in the maps, if the MAC address was specified for the device. If the added MAC address was not recognized as a learned MAC address, the address can be added to the switch in the Docusnap Management. (See chapter Edit Switch in the configuration manual)



4.5 Options - Inventory

Settings for the execution of the inventory can be specified in the *Options - Inventory* dialog. Click the *Options* button in the *Inventory* ribbon or the *Inventory* button in the Docusnap Menu to open the dialog.

General

Multi-Processing

In order to accelerate tasks such as inventorying Windows systems, Docusnap performs multiple tasks in parallel. By default, 30 concurrent processes can be performed.

The *Timeout in Seconds* field indicates how long Docusnap will wait for the completion of a process during an inventory scan before a timeout occurs. If, for

example, a Windows server is scanned over a WAN, it may take longer than 180 seconds until all information has been gathered. If the defined time period is exceeded, Docusnap will terminate the inventory process with a "Timeout" error.



In case of problems during an inventory scan performed over a WAN, reduce the number of concurrent processes and, at the same time, increase the timeout value. Docusnap uses roughly 250 kbits/s for each process.

- *Ping Timeout in Seconds*: This option enables you to increase the ping timeout value for the systems during an inventory process up to 20 seconds.
- *Set Scan Mode*
Remote or slow networks may cause information retrieval problems as too many concurrent processes are transferring data across the network.
 - If you select the *WAN* mode, Docusnap automatically reduces the number of parallel processes to two and doubles the *Timeout* value.
 - If you select the *LAN* mode, the settings from the *Multi-processing* group will be applied.

Show Features in Wizard

In Docusnap, you can extend the wizards by including additional steps (Export Settings, Software Search, etc.).

- *Software Search*
Software Search allows you to find software that cannot be scanned automatically due to a missing registry entry. If you enable the Software Search feature on the Options dialog, the wizards will include the additional Software Search step that you can use to list and select defined software products (see: [Software Search](#)).
- *Name Snapshots*
For each inventory scan, Docusnap creates a snapshot. Snapshots will be automatically named *Inventory from*, with the current timestamp appended to it. After enabling the *Name Snapshot* checkbox in this dialog, you can name the snapshots as desired.
- *Exporting Settings / Importing Saved Settings*
You can use the *Import* step in the wizards to load a saved configuration. This option is particularly helpful if you need to perform inventory scans repeatedly and with the same settings. When you select the desired configuration file, the settings saved in this file will be reused. Only the authentication step must be repeated.
You can save the current configuration of the wizard using the *Export* step and

reload it by selecting the *Import* step, as needed. This option is particularly helpful if you need to perform inventory scans repeatedly and with the same settings.

■ *Additional Tools*

Additional tools are used to integrate external utilities into the inventory process for Windows systems. You can add these tools in the Docusnap Management.

Options - Inventory

GENERAL INVENTORY

Multi-processing

Number of Parallel Processes: 30

Timeout in Seconds: 180

☐ Ping Timeout in Seconds: 0

Set Scan Mode: LAN

Show Features in Wizard

☐ Software Search ☐ Name Snapshots

☐ Import Saved Settings ☐ Export Settings

☐ Additional Tools

Time Zones

☐ Enable Display of Time Zones

OK Cancel

Time Zones

When systems are inventoried with several Discovery Service, which are in different time zones, the scheduling and the display can be confusing. For this reason, it is possible to activate the time zone display. This allows you to define during the scheduling whether the specified time refers to the respective time zone of the discovery service or the time zone of the Docusnap server or if the time is assumed to be UTC time.

Options - Inventory

GENERAL INVENTORY

Multi-processing

Number of Parallel Processes: 30

Timeout in Seconds: 180

☐ Ping Timeout in Seconds: 0

Set Scan Mode: LAN

Show Features in Wizard

☐ Software Search ☐ Name Snapshots

☐ Import Saved Settings ☐ Export Settings

☐ Additional Tools

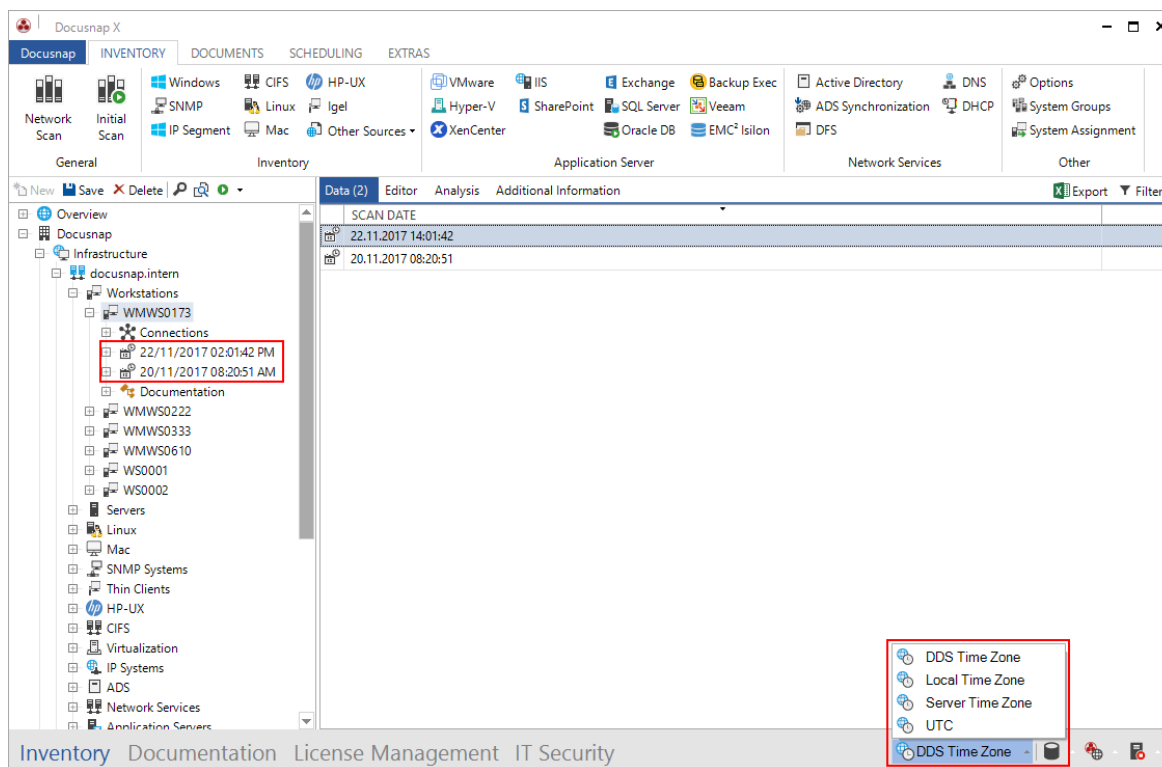
Time Zones

☒ Enable Display of Time Zones

OK Cancel

By activating the Display of Time Zones, the output of the scan date can be adjusted in the data explorer. In the status bar of Docusnap it can be selected which time zone is used for the display.

- **DDS Time Zone:** For each Discovery Service is stored in what time zone it is located. If the *DDS Time Zone* setting is selected, the data explorer displays the time that the Discovery Service had at the time of the inventory.
- **Local Time Zone:** If the *Local Time Zone* setting is selected, then the time of inventory is displayed at local time. If the installation of Docusnap and the Discovery Service are in the same time zone, nothing changes in the display.
- **Server Time Zone:** If the *Server Time Zone* setting is selected, the data explorer displays the time that the Docusnap Server had at the time of the inventory. Regardless if the the inventory was executed with the Docusnap Client, the Docusnap Server or a Discovery Service.
- **UTC:** With the *UTC* setting, all times are displayed as UTC time.



Inventory

Windows

■ Fallback Method for Windows Inventory

The fallback method can be activated when the standard way of inventorying systems doesn't work for all Windows systems, for example, if the WMI port is not available. If this method is enabled, the remote DocusnapScript.exe will be executed on the devices to obtain the data of the inventory in this way.

■ Ignore Windows Systems with DNS Problems

Selecting this option, systems are ignored for which problems with the DNS resolution occur.

Software

■ Inventory Hidden Software Components

If you enable the *Inventory Hidden Software Components* checkbox, Docusnap will also include invisible software categories in the inventory scan (some software providers define their software such that not all areas are visible).

SNMP

■ Using the DNS or Device Name for SNMP Inventory

For the SNMP inventory, you can use the device name or the DNS name, if it has been maintained. If the *Use System Name of the SNMP Device* option is selected, then the MAC address is added to the name, if the same device name was used.



more than once. If the *Use DNS for SNMP System* options is selected and the DNS resolution is not available, the IP address is used as the name.

- *Don't Inventory Topology*
Enable this checkbox if you do not want the topology of the SNMP devices to be scanned during an SNMP inventory process.
- *Inventory VLAN Info for CISCO Trunking*
Scanning the VLAN information during SNMP inventory of CISCO switches can significantly slow down the creation of the VLAN plan. For this reason, the option is currently disabled by default.

Other

- *Use Dedicated Domain Controller*
By enabling *Use Dedicated Domain Controller*, you can specify the domain controller to be used for listing the systems found during the inventory scan. For example, if the domain controllers are distributed to multiple sites, this can dramatically reduce the response times when querying the Active Directory. If this option is enabled, you need to specify the name of the dedicated domain controller in the Authentication step of the Inventory wizard.
- *No domain authentication for Hyper-V and IIS*
In order to scan Hyper-V and IIS devices that are not attached to any domain, you need to disable domain authentication.
- *Synchronized Port Checking*
A Windows, Linux, Mac, or IP inventory process searches the network for the systems available for scanning. This search runs asynchronously. If systems which exist in the network are not listed, you can alternatively enable the *Synchronized Port Checking* feature in the Options dialog. A synchronous search takes more time.
- *Disable CIFS Online Check*
To inventory CIFS which do not respond to a ping, you must disable the CIFS online check. This way, the CIFS inventory starts without waiting for a response from CIFS.
- *Inventory DNS Root Zone (.)*
If you enable the *Inventory DNS Root Zone (.)* checkbox, Docusnap will also determine the (.) root zone entries in the forward lookup zones when inventorying the DNS servers.

Options - Inventory

GENERAL

INVENTORY

Windows

☐ Fallback Method for Windows Inventory

☐ Ignore Windows Systems with DNS Problems

Software

☐ Inventory Hidden Software Components

SNMP

☒ Use System Name of the SNMP System

☐ Use DNS for SNMP System Name

☐ Don't Inventory Topology

☐ Inventory VLAN Info for CISCO Trunking


Other

☐ Use Dedicated Domain Controller☐ No domain authentication for Hyper-V and IIS

☐ Synchronized Port Checking

☐ Inventory DNS-Root Zone (.)

☐ Disable CIFS Online Check

 No RSA key has been defined yet.

OK

Cancel



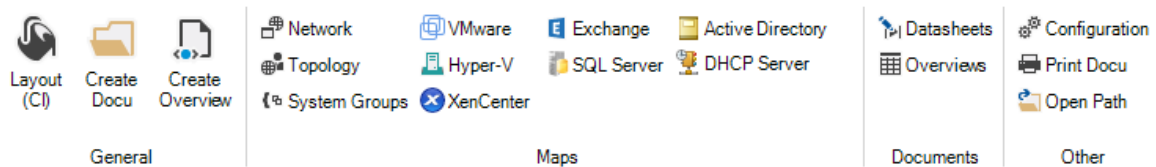
Part



5 Documentation

Data that has been determined by the network scan can be exported to files using the Documentation feature.

Using the *Documents* ribbon, you can create maps of your network as well as of the Active Directory, etc. These maps can be opened in Visio.



General

Use the options in this group to set the folder structure and to format the documentation to be created.

Creating Documentation

To create the documentation, various wizards are available.

Documentation View

Docusnap has a specific Documents tree view which allows you to manage the documents you create.

Printing Documentation

Datasheets and overviews can be printed using the *Print Documentation* wizard.

5.1 General

The files created in the Documentation module will be stored on the hard disk. For this, you need to select a custom directory as the location for storing the documents.

The Docusnap Server can be used to set a particular date and time for the automatic creation of the documentation.

The documentation can be created in English or in German. Even if English is selected as your interface language, it is possible to create documentation in German.

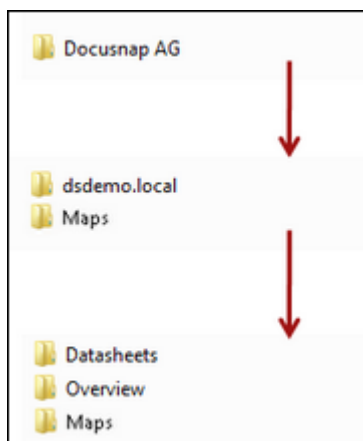
Ad hoc maps can be opened in the tree. These are regenerated when opened and always refer to the most current data. Ad hoc maps can be created for network, routing, topology and VLAN.

Folder Structure

The folder where the documents will be saved must be selected when getting started with Docusnap. This path is specified on the *General* page of the [Configuration - Documentation](#) dialog and can be changed later.

A folder hierarchy for storing the files will be created in the selected directory during the creation of the documents. At the top level, you will find a folder with the name of the company. Under this folder, a folder with the name of the domain will be created. The *Maps* folder contains maps with values from multiple domains.

Below the domain folder, Docusnap creates the *Datasheets*, *Overview* and *Maps* folders, respectively, when the associated documents are generated. Each Datasheet contains information about a single system and will be stored in a subfolder under the Datasheets folder that is named after the corresponding system.



To open the folder which reflects the folder hierarchy for the documents, click the *Open Path* button in the ribbon. The Documents tree view displays each generated map, overview or datasheet at its intended position.

Format Settings

The design of the documents and maps you create is influenced by two factors.

To format maps, go to the *General* page of the [Configuration - Documentation](#) dialog. Here, you can specify the font to be used in maps.

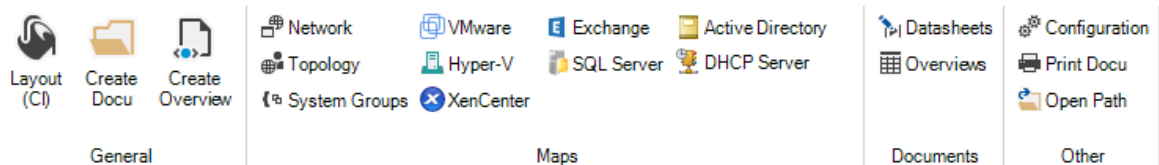
Datasheets and overviews are based on reports. For this reason, the format settings for the datasheets and overviews follow the format settings for the reports. To select the design for your reports, use the *Layout (CI)* dialog. If you want to open and edit report in the Report Designer, go to the *Manage Reports* dialog (Docusnap Management).

The report names for datasheets start with "Linux", "Mac", "Server", "SNMP", "Workstation" or "CIFS", followed by "Datasheet" and the reports for the overview have a "OV_" prefix, followed by "Computerlist", "Grouplist", "Softwarelist" and

"Userlist". In the *Manage Reports* dialog, you can select whether to display the entries in English or in German.

5.2 Creation of Documentation

By selecting the *Documents* ribbon, you can display the buttons required to document your IT environment.



General

Description of basic wizard steps for creating documentation.

Maps

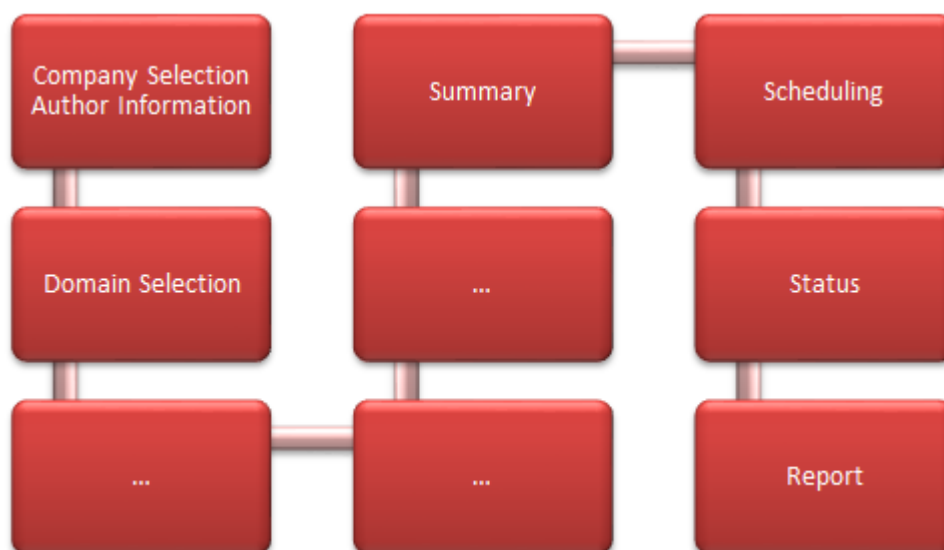
You can create Visio maps of your network, Active Directory, Exchange servers, etc.

Documents

The buttons in this group can be used to create datasheets and overviews.

5.2.1 Basic Steps

A wizard-based user interface helps you with creating the documentation. The wizard consists of a series of individual steps which vary depending on the type of document you selected. The following figure illustrates the basic steps used by each of the documentation wizards.



Company selection

[Domain Selection](#)[Summary](#)[Scheduling](#)[Status](#)[Report](#)

5.2.1.1 Company Selection

A documentation will always be created for the data of a specific company. Therefore, you need to select the company here. The drop-down list lets you select one of the existing companies.

The documentation path has been specified in the [Configuration](#) dialog. The documents will be stored in this path. The *Alternative Documentation Path* option allows you to select a different path for the current documentation. This path will be used exclusively for the documents created by running this wizard. This setting does not change the documentation path you have set in the Configuration dialog. If you want the documents to be created at a later time by using the Docusnap Server and the documentation path has been changed, make sure that the path exists on the executing system and that the Docusnap Server has the necessary permissions.

The documentation can be created in English or in German. You can even create a German documentation if the Docusnap user interface has been set to English.

If desired, you can set the names of the company and of the author to appear on the document. If the *Include Author Information in Documentation* checkbox is checked, the same or a different company can be selected as the authoring company. After you have selected a company, the table displays the names of all persons who were created as contacts in this company. Enabling the checkbox for a contact sets the name of this contact as author in the document.



Documentation

1

2

3

4

...

Company Selection

Domain Selection

Network Maps

Network Topology

Steps 5-15

Select Company

Docusnap AG

Documentation Path

☐ Alternative Documentation Path

C:\Docusnap\Documentation

Options

Language: English

☐ Just HTML Documentation

Author Information

☐ Include Author Information in Documentation

Docusnap AG

	LAST NAME	FIRST NAME	TITLE	POSITION	DEPARTMENT	SEX

☒ Company Selection: A company is selected.

Next

Cancel

5.2.1.2 Domain Selection

In the next step, you will select the domain to be documented. Multiple or all domains can be selected as required.

In addition it is defined, whether IT assets should be included in maps.

Documentation

1

2

3

4

...

Company Selection







Domain Selection

Network Maps

Network Topology

Steps 5-15

Domain Selection

<input checked="" type="checkbox"/>	DOMAIN	
<input checked="" type="checkbox"/>		
<input checked="" type="checkbox"/>	 bulk.docusnap.intern	
<input checked="" type="checkbox"/>	 docusnap.intern	
<input checked="" type="checkbox"/>	 docusnap.internal	
<input checked="" type="checkbox"/>	 rd.docusnap.intern	
<input checked="" type="checkbox"/>	 IT Assets	

Back

Next

Cancel



5.2.1.3 Summary Page

The Summary page shows an overview of the settings you specified in the individual steps of the wizard.

For each step, you can specify to create the respective document or not. For example, if you do not need to create network maps, you can disable their creation in the *Network Maps* step. With each step, you have the option to skip creation of the current document type. If you have cleared the document creation checkbox of each step in the *Create Docu* wizard, the *Next* button will be disabled on the Summary page when you are done with the wizard. In this case, you must either click *Back* to enable at least one document or exit the wizard by clicking *Cancel*. This is also true if you open a wizard for a single document type and you clear the corresponding checkbox.

Documentation

Steps 1-11 XenCenter Overview Map **Summary** Scheduling

Summary

☐ Selected Modules

- ☐ Network Map
- ☐ Routing Map
- ☐ Topology
- ☒ Datasheets
- ☐ Active Directory
- ☐ Active Directory Sites
- ☐ Active Directory Domains
- ☐ DHCP
- ☒ Exchange
- ☐ SQL
- ☒ VMware Infrastructure
- ☐ Overviews

☐ Details

- ☐ Network Map
- ☐ Routing Map
- ☐ Topology
- ☐ VLAN
- ☒ Datasheets
- ☒ Active Directory
- ☒ Active Directory Sites
- ☒ Active Directory Domains

Back Next Cancel

5.2.1.4 Scheduling

The *Scheduling* step is available in all wizards. To schedule the execution the tasks of the wizard at a later point of time, check the checkbox *Schedule Documentation*.

Assign a unique name to the batch job in the *Name* field so that it can be identified by its name in the scheduling dialogs. The field to the right is used to summarize the selected configuration.

Documentation

Steps 1-11 XenCenter Overview Map Summary **Scheduling**

☒ **Schedule Documentation**

Name:

Schedule Type:

Every week on Friday at 10:00:00. Schedule will be used from 15.09.2016.

Frequency

Interval:

Recurring every: week(s) on: ☐ Monday ☐ Tuesday ☐ Wednesday ☐ Thursday ☒ Friday ☐ Saturday ☐ Sunday

Frequency per day

☒ Once at:

☐ Every: Start: End:

Duration

Start Date: ☒ No End Date ☐ End Date:

5.2.1.5 Status

The Status dialog shows the documentation creation progress. While the system creates the documentation, the navigation pane is disabled. So, if you need to abort this process, you can only click the *Cancel* button.

The actual progress of each task will be displayed by means of progress bars which can take on various states:

- A green progress bar indicates that a task has been performed successfully.
- A red progress bar indicates that an error has occurred during the creation of the respective document.

After creating the documentation, the wizard automatically takes you to the Report page where a final report is displayed.

Documentation

...

14

15

16

17

Steps 1-13

Summary

Scheduling

Status

Report

Documentation Status

NAME	TYPE	PROGRESS IN %	INFORMATION
Datasheets	Datasheets	<div></div>	Completed
Overviews	Overviews	<div></div>	Executing Process
dsra.local: User list	Overviews	<div></div>	Creating C:\Docusnap\Documentation\Docusna...
dsra.local: Group list	Overviews	<div></div>	Waiting for other processes
dsra.local: Computer list	Overviews	<div></div>	Waiting for other processes
dsra.local: Software list	Overviews	<div></div>	Waiting for other processes
dsra.local: Management...	Overviews	<div></div>	Created successfully
IT Assets: Management...	Overviews	<div></div>	Created successfully

Cancel

5.2.1.6 Report Page

The final report shows which documents have been successfully created and which caused errors. The structure of the view reflects the individual documentation steps that were performed successfully or caused errors. Error messages will be shown for the steps that caused errors. If you wish to open the document right after its creation, click the *Open Map* button.

Documentation

...

14

15

16

17

Steps 1-13
Summary
Scheduling
Status
Report

Report

NAME	TYPE	INFORMATION
Summary		Required Time: 00:02:34
Datasheets		Completed
Overviews		Completed
Visio Maps		Completed
Successful (51)		
Incomplete (3)		

Close

5.2.2 Map Files

The documentation you can create in Docusnap includes maps of the network, the Active Directory, the Exchange servers, etc.

Maps can be created in native Visio format (.vsd) and in Visio XML format (.vdx). Both formats are created by default. In the [Options](#) dialog you can choose whether a format should be suppressed or not. Only the format .vdx can be created automatically with the Docusnap Server. No maps with the format .vsd can be created via the Docusnap Server.



If the creation of maps is schedule, the maps are newly generated each time to display the current data situation. For this reason, layout changes in the preview such as moving or deleting elements cannot be retained for scheduled maps. If Settings are defined via the checkboxes, they are applied to the scheduled execution as well.

Network Maps

Topology

Active Directory

Exchange Server



VMware Infrastructure

Hyper-V

SQL Server

DHCP Server

Overview

System Groups

Xen Server

5.2.2.1 Network Map

The network or routing map can be created using the *Create Docu* wizard, the *Network* wizard or by clicking on the *Network Map* or *Routing Map* node in the tree.

Documentation Wizard

In the *Create Map for* combobox, you can select whether the maps are to be created for the *Company & Domain*, for the *Domain* only, or for the *Company* only. Only domains selected in the *Domain Selection* step are considered.

In the maps for the company, all selected domains are combined in one map.

The maps for the company will be stored in the Maps folder directly under the folder with the company name.

(\Documentation Path\Company\Maps\network)

(\Documentation Path\Company\Maps\routing)

If you create the maps for the domain, the Visio file and the HTML file are saved to the Maps folder of that domain.

(\Documentation Path\Company\Domain\Maps\network)

(\Documentation Path\Company\Domain\Maps\routing)

When selecting the domain(s), you can also specify whether to include IT assets in the network map or not. If you enable the *IT Assets* entry, all IT assets where a value of the *Network Information* type has been defined will be displayed for selection.

On this page, you can specify whether to create the network map and/or the routing map.

All systems existing in the selected domains are displayed in the Systems table. To include a system in the network or routing map, tick the corresponding checkbox.

Using the filter to the right of the selection list, you can restrict the selection to specific equipment. For more information about filtering, see the [Filters](#) chapter. To include only servers, workstations, Linux systems, etc. into your network map or routing map, click the corresponding icon(s). Clicking each icon a second time will exclude the respective system type again.

You can create datasheets for the individual systems. These datasheets can be linked to the objects in the network map and the routing map. The options under Advanced, which are also available as preferences in the *Configuration* dialog, allow you to specify the formats used for datasheet linking, if desired. The links will be created even if that particular datasheet does not exist yet. This way, datasheets created subsequently will also be linked to the systems in the network map and the routing map.

DocuSnap also provides Management tools. For example, you can establish a remote desktop connection to a previously found system. The management tools can also be used with the two map types and the HTML file. For this purpose, a Scripts folder that contains the scripts required for the management tools will be created in the Datasheets folder.

If IT assets with a value of the *Network Information* type have been defined, they will be shown in the list. To include an IT asset in the network map, tick the corresponding checkbox.

Documentation

1 Company Selection 2 Domain Selection 3 **Network Maps** 4 Summary 5 Scheduling

☒ Create Network Map

Create Map for: Company & Domain

☒ Create Network Map Preview

☒ Create Routing Map Preview Advanced

Systems

<input checked="" type="checkbox"/>	NAME	TYPE	DOMAIN
<input checked="" type="checkbox"/>	DSWS01	Workstation	dsra.local
<input checked="" type="checkbox"/>	DSBK01	Server	dsra.local
<input checked="" type="checkbox"/>	DSEX01	Server	dsra.local
<input checked="" type="checkbox"/>	DSFS01	Server	dsra.local
<input checked="" type="checkbox"/>	DSFS02	Server	dsra.local
<input checked="" type="checkbox"/>	DSSP01	Server	dsra.local
<input checked="" type="checkbox"/>	DSSP02	Server	dsra.local
<input checked="" type="checkbox"/>	DSDC01	DC	dsra.local
<input checked="" type="checkbox"/>	AFWUTM01	SNMP	dsra.local
<input checked="" type="checkbox"/>	SESX10	Linux Server	dsra.local
<input checked="" type="checkbox"/>	SESX11	Linux Server	dsra.local

Back Next Cancel

The preview window reflects the layout of the network map or routing map.

Ad hoc map in the tree

The maps can be created by clicking on the *Network Map* or *Routing Map* node in the tree. These maps are always created using the current data and are generated each time they are opened. In contrast to the wizard, it is not possible to exclude individual systems. The other optional settings can also be made for the ad hoc plans.

Options

You can change the layout, if required. For most network and routing maps, it is recommended to use the default settings. You can adjust both map types individually:

Network map

If you enable the *Group Workstations* or *Group SNMP Systems* checkbox, the workstations or SNMP equipment will be drawn on the network map as one single object. Two other options allow you to include IP systems and ignore VMware adapters. Details about the individual computers that are present in the network will be displayed on an additional datasheet.

By enabling the *Group IT Assets* checkbox, you can group all IT assets and output them as a single object.

In the HTML view of the map, the various datasheets will be displayed as links in the left pane of the browser. The Visio file and the HTML file will be stored in the Maps folder.

- ☐ Group Workstations
- ☐ Group IT Assets
- ☐ Include IP Systems
- ☐ Ignore VMware Adapters
- ☐ Group SNMP Systems

Options

Routing map

The routing map preview provides a checkbox that enables you to ignore the VMware adapters.

- ☐ Ignore VMware Adapters

Options

5.2.2.2 Topology

You can create a network topology map either using the *Create Docu* wizard or the *Topology* wizard.

A network topology map shows the interrelations of switches, virtual switches and systems in a network environment. Switches are scanned using an [SNMP systems](#) inventory scan. For virtual switches, you need to perform a [VMware Infrastructure](#) inventory scan.

Documentation Wizard

In the *Create Map for* combobox, you can select whether the maps are to be created for the *Company & Domain*, for the *Domain* only, or for the *Company* only. Only domains selected in the *Domain Selection* step are considered.

In the maps for the company, all selected domains are combined in one map.

Use the *Ignore Virtual Structures* checkboxes to determine, if the *Topology Maps* and the *VLAN Maps* should include virtual structures.

DocuSnap will generate additional maps for switches and virtual switches that have been selected in the *Switch Maps* table. These maps will show the systems connected to the selected switch.

The maps for the company will be stored in the *Maps* folder below the company.

(\Documentation Path\Company\Maps\topology)

If you create the maps for the domain, the Visio and html files will be stored in the *Maps* folder of that domain.

(\Documentation Path\Company\Domain\Maps\topology)

Documentation

1 Company Selection 2 Domain Selection 3 **Network Topology** 4 Summary 5 Scheduling

☒ Create Network Topology Map

Create Map for: Company & Domain

☒ Create Topology Map Preview

☒ Create VLAN Map Preview

Switch Maps

	NAME	TYPE	DOMAIN
<input checked="" type="checkbox"/>	ASWIT011	SNMP	dsra.local
<input checked="" type="checkbox"/>	ASWIT013	SNMP	dsra.local
<input checked="" type="checkbox"/>	ASWIT016	SNMP	dsra.local
<input checked="" type="checkbox"/>	ASWIT001	SNMP	dsra.local
<input checked="" type="checkbox"/>	ASWIT002	SNMP	dsra.local
<input checked="" type="checkbox"/>	ASWIT003	SNMP	dsra.local
<input checked="" type="checkbox"/>	ASWIT004	SNMP	dsra.local
<input checked="" type="checkbox"/>	ASWIT005	SNMP	dsra.local
<input checked="" type="checkbox"/>	ASWIT014	SNMP	dsra.local
<input checked="" type="checkbox"/>	ASWIT015	SNMP	dsra.local
<input checked="" type="checkbox"/>	ASWIT017	SNMP	dsra.local

Back Next Cancel

Ad hoc map in the tree

The maps can be created by clicking on the *Topology Map* or *VLAN Map* node in the tree. These maps are always created using the current data and are generated each time they are opened. The optional settings can also be made for the ad hoc plans.

Options

The following options can be defined in the wizard and for the ad hoc maps.

Ignore Virtual Structures: This option determines for topology maps and VLAN maps whether virtual structures should be included.

Topology Map and VLAN Map

Some of these options are only available for the topology map.

Potential Access Points: Docusnap includes uninventoried end devices in the map on the basis of CDP and LLDP. These are usually access points.

Layer3 Elementes: In the map, end devices (firewalls, server systems) are displayed if they are redundantly connected to several switches. If desired, they can be hidden.

Tunnel Connection: If a tunnel connection is known via LLDP or CDP, this option displays the connection.

VLAN Tables: This option displays the respective VLANS as a table for switches. VLAN tables with the same content are colored the same way.

Port with VLAN Information: This option displays the tagged and untagged information for the ports in the detailed maps of the switches.

Filter for Relevant VLANs: With this option, only VLANs with end devices are displayed.

Switch Details: This option defines which information is displayed for the switches.

Cable Bandwidth: This option displays the cable bandwidth for the connections.

Port Names: The name of the port can be displayed for each connection.

Virtual Structures: With this option, the virtual structures are taken into account in the overview plan. You can also select whether the individual maps for the virtual structures are to be created.


Virtual Switches: This option can be used to select whether the individual maps for the virtual switches should be created.

Visualize Cable Bandwidth: With this option, lines of a connection are colored differently depending on the speed and at higher speeds a thicker line is used. If the

speed exceeds 10GB the line becomes blue. If the speed falls below 1GB, the line is shown in red. In the other cases the line is drawn in green.

Highlight Missing Data: This option marks switches if they do not have LLDP, CDP or STP, if there are no learned MAC addresses or the interface stack data is missing. By right-clicking on the highlighted object and clicking on Show data, the error message is displayed in an additional dialog.

Edit Systems: Click on the *Edit Systems* button to open a dialog for selecting the switches. The detailed plan is only created for the selected switches.

<input checked="" type="checkbox"/> Potential Access Points	<input checked="" type="checkbox"/> VLAN Tables	<input checked="" type="checkbox"/> Switch Details	<input checked="" type="checkbox"/> Virtual Structures	<input checked="" type="checkbox"/> Visualize Cable Bandwidth	 Edit Systems
<input checked="" type="checkbox"/> Layer3 Elements	<input checked="" type="checkbox"/> Port with VLAN Information	<input checked="" type="checkbox"/> Cable Bandwidth	<input checked="" type="checkbox"/> Virtual Switches	<input checked="" type="checkbox"/> Highlight Missing Data	
<input checked="" type="checkbox"/> Tunnel Connections	<input checked="" type="checkbox"/> Filter for Relevant VLANs	<input checked="" type="checkbox"/> Port Names			
Special	VLAN	Details	Virtual	Visualization	

5.2.2.3 Active Directory

The Active Directory wizard step presents a choice of three different maps. Use the checkboxes on the left to select the domains and the maps to be created. The generated maps will be added to the directory structure.

Documentation
□ ×

1
2
3
4
5

Company Selection
Domain Selection
Active Directory
Summary
Scheduling

☒ Create Active Directory Maps

Active Directory Maps

<input checked="" type="checkbox"/>	DOMAIN	FILTER	EDIT FILTER	PREVIEW	OU MAP	OVERALL ...	GPO MAP
<input checked="" type="checkbox"/>	dsra.local	<input type="checkbox"/>	Filter	Preview	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Active Directory Site Maps

<input checked="" type="checkbox"/>	DOMAIN	PREVIEW	SHOW REPLICATION	SHOW SITE TRANSPORT
<input checked="" type="checkbox"/>	dsra.local	Preview	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Active Directory Domain Maps

<input checked="" type="checkbox"/>	DOMAIN	PREVIEW
<input checked="" type="checkbox"/>	dsra.local	Preview

Back
Next
Cancel

The preview allows you to check the look and feel of the maps. You can change the map layout, if desired. For most cases, we recommend to use the default settings.

Active Directory Map

(\Documentation Path\Company\Domain\Maps\adstree)

Before creating an Active Directory map, you can click the *Filter* button to open the *Select Organizational Unit* dialog where you can limit the map scope by setting specific filter criteria.

The resulting preview allows you to adjust the Active Directory structure. This means that you can create either an OU map, an overall map or a group policy map. If desired, you can add Active Directory classes to the map or removed them by using the checkboxes next to each Active Directory class.

<input type="radio"/> OU Map	<input checked="" type="checkbox"/> User	<input checked="" type="checkbox"/> Computer	<input checked="" type="checkbox"/> Foreign Security Principal
<input checked="" type="radio"/> Overall Map	<input checked="" type="checkbox"/> Group	<input checked="" type="checkbox"/> Volume	<input checked="" type="checkbox"/> Group Policy Container
<input type="radio"/> Group Policy Map	<input checked="" type="checkbox"/> Contact	<input checked="" type="checkbox"/> InetOrgPerson	<input checked="" type="checkbox"/> BuiltInDomain

Options

Active Directory Site Map

(\Documentation Path\Company\Domain\Maps\adssites)

An Active Directory site map graphically represents the locations of an entire AD structure. It not only displays the site names, but also the domain controllers and subnets associated with each site. Optionally, you can choose to output the site links as routing information.

When creating the Active Directory site map, you can use the preview to specify directly whether you want replications or the site transport to be included in the map.

<input checked="" type="checkbox"/> Show Replication
<input checked="" type="checkbox"/> Show Site Transport

Options

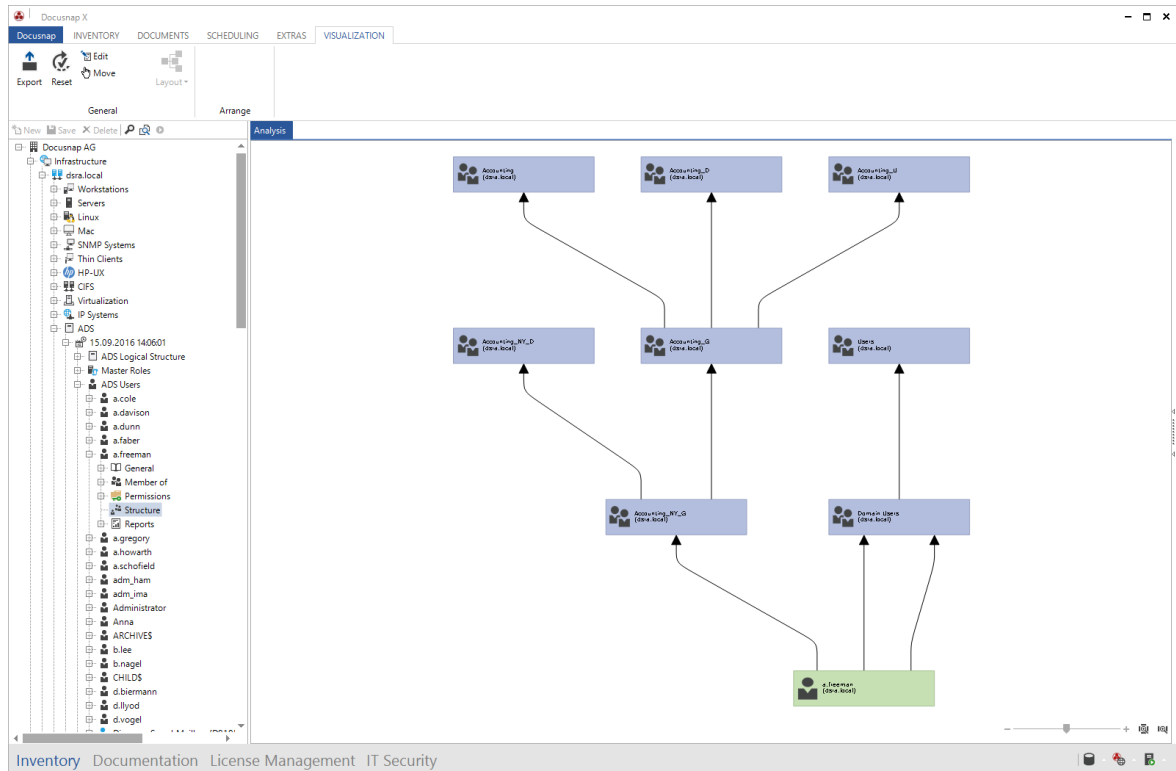
Active Directory Domain Map

(\Documentation Path\Company\Domain\Maps\adsdomains)

An Active Directory Domain map graphically represents the domains that exist in a structure. This includes the trust relationships within the overall structure and within other structures. This map also shows the distribution of the operations master roles for the overall structure and the domains.

Active Directory structure of individual groups and users

The Active Directory map displays all groups and users. It is also possible to show only the relationship between a certain ADS user and an ADS group, or all ADS users belonging to an ADS group. The [Structure](#) tab in the main window displays all associated groups for the selected user or all group members for the selected group. You can export this structure.



5.2.2.4 Exchange Server

Exchange Server maps can be created either from the *Create Docu* wizard or the *Exchange Server* wizard.

The Visio file and the HTML file will be stored in the Maps folder.

(\Documentation Path\Company\Domain\Maps\exchange)

Once you have selected the domains, all Exchange Servers in the domains will be displayed. Each server whose checkbox is enabled will be included in the Exchange Server map.

The preview reflects the layout of the Exchange Server map.

Documentation

1 2 3 4 5

Company Selection Domain Selection **Exchange Server** Summary Scheduling

☒ Create Exchange Server Maps

<input checked="" type="checkbox"/>	DOMAIN	PREVIEW
<input checked="" type="checkbox"/>	dsra.local	Preview

Back Next Cancel

5.2.2.5 VMware Infrastructure

The VMware Infrastructure map can be created either from the *Create Docu* wizard or the *VMware Infrastructure* wizard.

The preview allows you to check the look and feel of the maps. You can change the map layout, if desired. For most cases, we recommend to use the default settings.

The VMware map will be stored in the *VMware* subfolder of the documentation directory.

(\Documentation Path\Company\Domain\Maps\VMware\VMware name)

Documentation

1 Company Selection 2 Domain Selection 3 **VMware Infrastructure** 4 Summary 5 Scheduling

☒ Create VMware Infrastructure Map

<input checked="" type="checkbox"/>	NAME	DOMAIN	PREVIEW
<input checked="" type="checkbox"/>	SVIC02	dsra.local	Preview

Back Next Cancel

In the generated preview, you can see which maps will be created. The graphics display the interconnections between the various entities existing in a VMware environment. These entities are virtual machines, networks, hosts and data stores. Each map reflects the respective assignments.

- ☒ Overview
 ☐ Host to Network
☐ Host to VM
 ☐ VM to Network
☐ Host to Data Store
 ☐ VM to Data Store

Options

5.2.2.6 Hyper-V

The Hyper-V Server map can be created either from the *Create Docu* wizard or the *Hyper-V* wizard.

Once you have selected the domains, all Hyper-V servers from each domain will be displayed. Each server whose checkbox is enabled will be included in the Hyper-V map.

The preview window reflects the layout of the Hyper-V map. You can change the layout, for most Hyper-V maps, however, we recommend to use the default settings.

The Hyper-V map will be stored in the Maps folder of the corresponding domain.

(\Documentation Path\Company\Domain\Maps\hyperv\Hyper-V server name)

Documentation

1

2

3

4

5

Company SelectionDomain SelectionHyper-VSummaryScheduling

☒ Create Hyper-V Map

<input checked="" type="checkbox"/>	NAME	DOMAIN	PREVIEW
<input checked="" type="checkbox"/>	CHYPERV01	dsra.local	Preview

BackNextCancel

You can enable/disable the checkboxes in the preview to specify whether the Host to VM, Host to Network or VM to Network relationships will be shown in the map.

- ☒ Host to VM
☐ Host to Network
☐ VM to Network

Options

5.2.2.7 SQL Server

The SQL Server map contains all databases that are located on an SQL server. If you enable the *Display System Databases* checkbox, the system tables from the database will also be shown in the map. Databases to be excluded from the map can be disabled in the list.

The Visio file and the HTML file will be stored in the Maps folder.

(\Documentation Path\Company\Domain\Maps\sql)

Documentation

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Company Selection
Domain Selection
SQL Server
Summary
Scheduling

☒ Create SQL Server Map

☐ Display System Databases

<input checked="" type="checkbox"/>	DOMAIN	PREVIEW	
<input checked="" type="checkbox"/>	dsra.local	Preview	

SQL Server - ER Diagrams

☒ Display Only Key Columns

<input checked="" type="checkbox"/>	SERVER NAME	DATABASE NAME	PREVIEW	
<input checked="" type="checkbox"/>	DSFS02	SharePoint_Config	Preview	

Back
Next
Cancel

5.2.2.8 DHCP Server

The DHCP Server map can be created either from the *Create Docu* wizard or the *DHCP Server* wizard.

Once you have selected the domains, all DHCP servers from each overall structure will be displayed. Each server whose checkbox is enabled will be included in the DHCP map.

The preview window reflects the layout of the DHCP Server map. You can change the layout, if required. For most DHCP Server maps, however, we recommend to use the default settings.

The DHCP map will be stored in the Maps folder for the corresponding domain.

(\Documentation Path\Company\Domain\Maps\dhcp)

Documentation

1 2 3 4 5

Company Selection Domain Selection **DHCP Server** Summary Scheduling

☒ Create DHCP Server Maps

	DOMAIN	PREVIEW
<input checked="" type="checkbox"/>	dsra.local	Preview

Back Next Cancel

5.2.2.9 XenCenter

XenCenter maps can be created either from the *Create Docu* wizard or the dedicated *XenCenter* wizard.

The preview allows you to check the look and feel of the maps. You can change the map layout, if desired. For most cases, we recommend to use the default settings.

The XenCenter map will be stored in the *Xen* subfolder of the documentation directory.

(\Documentation Path\Company\Domain\Maps\Xen\Name of the XenCenter)

Documentation

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Company Selection

Domain Selection

XenCenter

Summary

Scheduling

☒ Create Xen Infrastructure Map

<input checked="" type="checkbox"/>	NAME	DOMAIN	PREVIEW
<input checked="" type="checkbox"/>	Pool	dsra.local	Preview

Back

Next

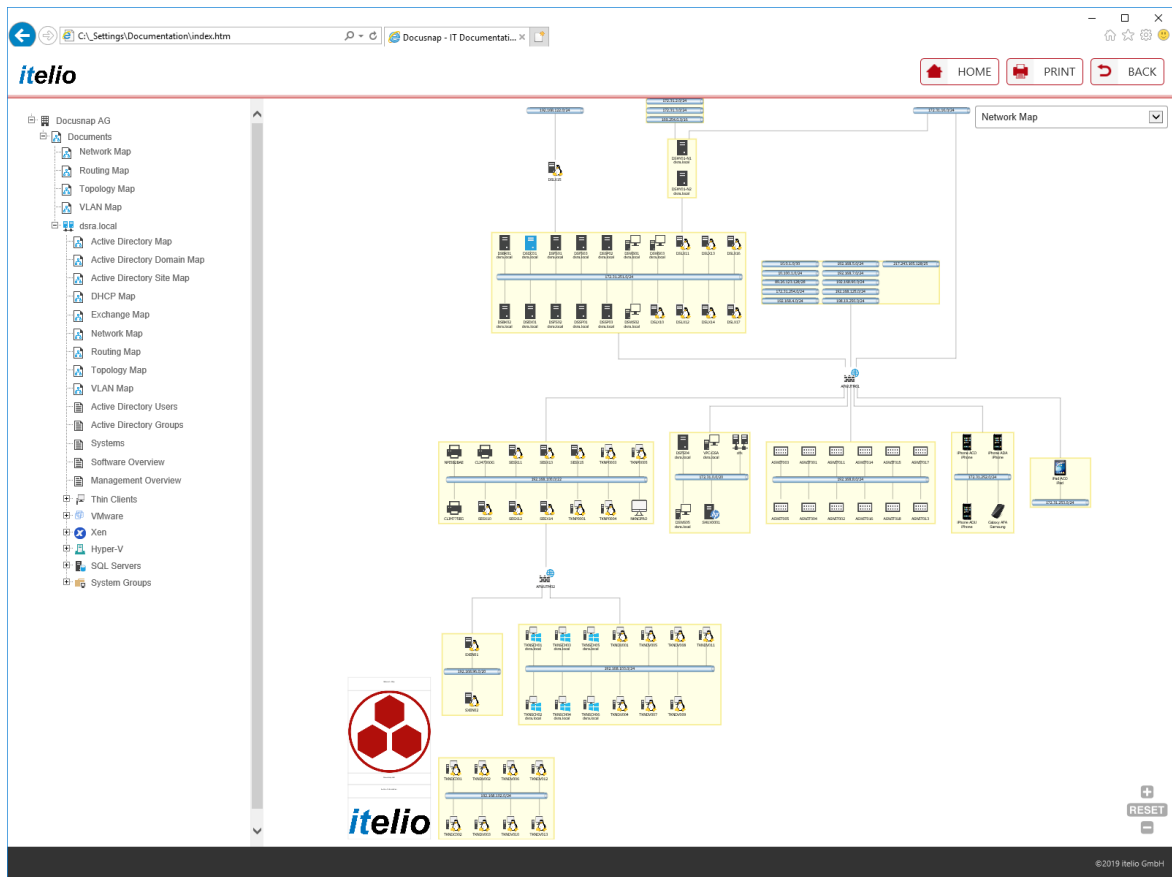
Cancel

From the generated preview, you can specify which maps to create. The graphics display the interconnections between the various entities existing in a Xen environment. These entities are virtual machines, networks, hosts, and data stores. Each map reflects the respective assignments.

5.2.2.10 Overview Map

To create overview maps, either use the *Create Overview* wizard.

An overview map displays all maps that can be generated. If this map already exists in the directory, a link will be established so that you can open either the HTML map or the Visio map.



When creating the map select the company and the domains the map should include. Check the *Only Include Generated Documents* to only include links to documents which were already created. Otherwise all documents are listed and will be linked in the *Overview Map* once they are generated.

By specifying an *Alternative Documentation Path* a different path for the overview can be used.

The preview window reflects the layout of the overview map. You can change the layout, if required. For most overview maps, however, we recommend to use the default settings.

Overview maps will be stored in the *Maps* directory below the documentation directory for the corresponding company.

(\Documentation Path\index.htm)

Documentation

1 2 3

Overviews Summary Scheduling

☒ Create Overview

Options

☐ Only Include Generated Documents

☐ Alternative Documentation Path C:\Docusnap\Documentation

Language

English

Selection

☒ Docusnap AG

☒ dsra.local

Next Cancel

5.2.2.11 System Groups

In Docusnap, it is possible to define [system groups](#). This means that systems belonging for example to the same department can be combined into one group.

For these system groups, you can create network maps, routing maps and datasheets. To create the documents for the system groups, use the *System Groups* button. The *Create Docu* wizard is not available for this kind of documentation.

In the first step, you select the domain. When creating network maps and datasheets for system groups, you must additionally select the desired system group. Only one group may be selected at a time.

The screenshot shows a window titled 'Documentation' with a progress bar at the top. The progress bar has five steps: 1 (Company Selection), 2 (System Groups), 3 (Network Maps), 4 (Datasheets), and 5 (Steps 5-6). Step 2 is currently selected. Below the progress bar, there is a 'Domain Selection' section with a text box containing 'dsra.local'. Below that is a section titled 'Auswahl der Systemgruppe' (Selection of System Group) which contains a table with three rows: 'GROUP NAME', 'Development', 'Management', and 'Support'. The 'Development' row is selected. To the right of the table is a large empty box. At the bottom right of the window are three buttons: 'Back', 'Next', and 'Cancel'.

	GROUP NAME
<input checked="" type="checkbox"/>	Development
<input type="checkbox"/>	Management
<input type="checkbox"/>	Support

Then, you can select the systems to be included in the network map and/or routing map. Docusnap will only display systems that have been assigned to the selected system group. When you create network maps for system groups, you can also group workstations and SNMP systems. To include a system in the network map, tick the corresponding checkbox. Using the filter to the right of the selection list, you can enhance transparency by displaying only the desired systems. For more information about filtering, see the [Filters](#) section. If you want to include only servers, workstations, Linux systems, etc. into your network map, click the corresponding icon(s). Clicking each icon a second time will exclude the respective system type again.

In the next step, you can create datasheets for each system. These datasheets can be linked to the objects in the network map. The options under *Advanced*, which are also available as preferences in the [Configuration](#) dialog, allow you to specify the formats for datasheet linking, if desired. The links will be created even if that particular datasheet does not exist yet. This way, also datasheets created at a later time, will be linked to the systems in the network map.

The preview window reflects the layout of the network map or routing map. You can change the layout, if required. For most network and routing maps, you get the best results when using the default settings. What is more, the preview enables you to make the same changes as described under [Network Map](#).

If you want to create only the datasheets for the system group, but not the network and routing maps, this step can be skipped. To do so, clear the *Create Network Map* and/or *Create Routing Map* checkbox.

Documentation

1 Company Selection 2 System Groups **3 Network Maps** 4 Datasheets ... Steps 5-6

☒ **Create Network Map**

Create Map for: Company & Domain

☒ Create Network Map Preview

☒ Create Routing Map Preview Advanced

Systems

<input checked="" type="checkbox"/>	NAME	TYPE	DOMAIN
<input checked="" type="checkbox"/>	DSBK01	Server	dsra.local
<input checked="" type="checkbox"/>	DSEX01	Server	dsra.local
<input checked="" type="checkbox"/>	DSFS01	Server	dsra.local
<input checked="" type="checkbox"/>	DSFS02	Server	dsra.local
<input checked="" type="checkbox"/>	DSSP01	Server	dsra.local
<input checked="" type="checkbox"/>	DSSP02	Server	dsra.local
<input checked="" type="checkbox"/>	DSDC01	DC	dsra.local
<input checked="" type="checkbox"/>	ASWIT010	SNMP	dsra.local
<input checked="" type="checkbox"/>	cifs	CIFS	dsra.local
<input checked="" type="checkbox"/>	CLJ4730EG	SNMP	dsra.local
<input checked="" type="checkbox"/>	CLJ4730OG	SNMP	dsra.local

Back **Next** Cancel

In the next step, you can select the systems for which to create datasheets. The datasheets will contain all information about the selected systems, such as software, hardware, networks, services, local users, etc.

To create the network maps without any datasheets, disable the *Create Datasheets for Servers, Workstations, SNMP, Linux and Mac Systems* checkbox.

The datasheets may also include comments that have been stored with the systems. Comments saved at the system level will be shown, but no comments created for lower levels. In addition, the attachments can be included. If you enable the *Export Attachments* checkbox, the attachments to the comments will be listed in the report and the attachments themselves will be stored in the Comments folder.

(\Documentation Path\Company\Domain\System Groups Name\DataSheets\Name of the System\Attachments\Comments)

It is possible to integrate additional tools into the scanning process. You can add these tools from the *Additional Tools* in the Docusnap Management. In case an additional tool is used for inventorying, the results can be output along with the datasheet. If the *Show Results of the Additional Tools* checkbox is enabled, the

results found by the additional tool for each system will be exported to a folder under the Datasheet folder.

(\Documentation Path\Company\Domain\System Groups Name\DataSheets\Name of the System\ToolResults)

Documentation

Steps 1-2 Network Maps **Datasheets** Summary Scheduling

☒ Create Datasheets for Servers, Workstations, SNMP, Linux and Mac Systems

☐ Show Comments ☐ Show Results from Additional Tools Advanced

☐ Export Attachments

Systems

	NAME	TYPE	DOMAIN
<input checked="" type="checkbox"/>	ASWIT003	SNMP	dsra.local
<input checked="" type="checkbox"/>	ASWIT005	SNMP	dsra.local
<input checked="" type="checkbox"/>	ASWIT010	SNMP	dsra.local
<input checked="" type="checkbox"/>	cifs	CIFS	dsra.local
<input checked="" type="checkbox"/>	CLJ4730EG	SNMP	dsra.local
<input checked="" type="checkbox"/>	CLJ4730OG	SNMP	dsra.local
<input checked="" type="checkbox"/>	CLJM775EG	SNMP	dsra.local
<input checked="" type="checkbox"/>	CLJM775EG	SNMP	dsra.local
<input checked="" type="checkbox"/>	DSBK01	Server	dsra.local
<input checked="" type="checkbox"/>	DSDC01	DC	dsra.local
<input checked="" type="checkbox"/>	DSEX01	Server	dsra.local
<input checked="" type="checkbox"/>	DSFS01	Server	dsra.local

Back Next Cancel

5.2.3 Data Sheets

Datasheets can be created using either the *Create Docu* wizard or the *Create Datasheets* wizard.

After you have selected the domains, all servers, workstations, SNMP, Linux and Mac systems that exist in the selected domains will be displayed. If the checkbox next to a system is enabled, a datasheet will be created for it.

Each datasheet contains all current information that is located at the levels below the node of the selected system.

The datasheets may also include comments that have been stored with the systems. Comments saved at the system level will be shown, but no comments created for lower levels. In addition, the attachments can be included. If you enable the *Export Attachments* checkbox, the attachments will be listed with the comments in the report and the attachments themselves will be stored in the *Comments* folder.

(\Documentation Path\Company\Domain\Datasheets\Name of the System\Attachments\Comments)

When performing an inventory scan, additional tools can also be included. You can add these tools from the Additional Tools page in the Docusnap Management. The results of an additional tool used for inventorying can be output along with the datasheet. If you enable the *Show Results from Additional Tools* checkbox, the results this tool found for the respective system will be exported to a folder under the Datasheet folder.

(\Documentation Path\Company\Domain\Datasheets\Name of the System\ToolResults)

To filter the display, you can select one of the filter buttons on the right.

When creating datasheets, you can additionally enable the *Print Preparation* option. It can be used to generate an additional file with the *.mdc* file extension. This file is required if you want to use the *Print Docu* wizard to print the documentation.

The documentation will be stored in the *Datasheets* subfolder of the documentation directory.

(\Documentation Path\Company\Domain\Datasheets)

Documentation

1 Company Selection 2 Domain Selection 3 **Datasheets** 4 Summary 5 Scheduling

☒ Create Datasheets for Servers, Workstations, SNMP, Linux and Mac Systems

☐ Show Comments ☐ Show Results from Additional Tools Advanced

☐ Export Attachments

Systems

<input checked="" type="checkbox"/>	NAME	TYPE	DOMAIN
<input checked="" type="checkbox"/>	192.168.102.117	SNMP	dsra.local
<input checked="" type="checkbox"/>	192.168.102.125	SNMP	dsra.local
<input checked="" type="checkbox"/>	AFWUTM01	SNMP	dsra.local
<input checked="" type="checkbox"/>	ASWIT001	SNMP	dsra.local
<input checked="" type="checkbox"/>	ASWIT003	SNMP	dsra.local
<input checked="" type="checkbox"/>	ASWIT005	SNMP	dsra.local
<input checked="" type="checkbox"/>	ASWIT010	SNMP	dsra.local
<input checked="" type="checkbox"/>	cifs	CIFS	dsra.local
<input checked="" type="checkbox"/>	CLJ4730EG	SNMP	dsra.local
<input checked="" type="checkbox"/>	CLJ4730OG	SNMP	dsra.local
<input checked="" type="checkbox"/>	CLJM775EG	SNMP	dsra.local
<input checked="" type="checkbox"/>	CLJM775EG	SNMP	dsra.local

Back Next Cancel

5.2.4 Overviews

Overviews can be created using either the *Create Docu* wizard or the *Overviews* wizard.

After you have selected the domains, you are presented with a choice of overview documents that can be created. Enable the checkbox of every overview type you wish to create.

The overviews will be stored in the *Overview* subfolder of the documentation directory under the corresponding company and domain. Creating an overview results in three files. The *computerlist_en.html* and *computerlist_en.xlsx* files are based on the report and include the company and the name of the author. The *computerlist_plain_en.xlsx* file is a flat table in Excel format.

When creating overviews, you can also tick the *Print Preparation (MDC)* checkbox. It can be used to generate an additional file with the *.mdc* file extension. This file is required if you want to use the *Print Docu* wizard to print the documentation.

The files will be stored in the *Overview* folder.

(\Documentation Path\Company\Domain\Overview)

Documentation

1 2 3 4 5

Company Selection Domain Selection Overview Map Summary Scheduling

☒ Create Overviews

Active Directory

☒ Active Directory User

☒ Active Directory Groups

Edit Systems

☒ Systems

Software

☒ Software Overview

Management

☒ Management Overview

General

☐ Print Preparation

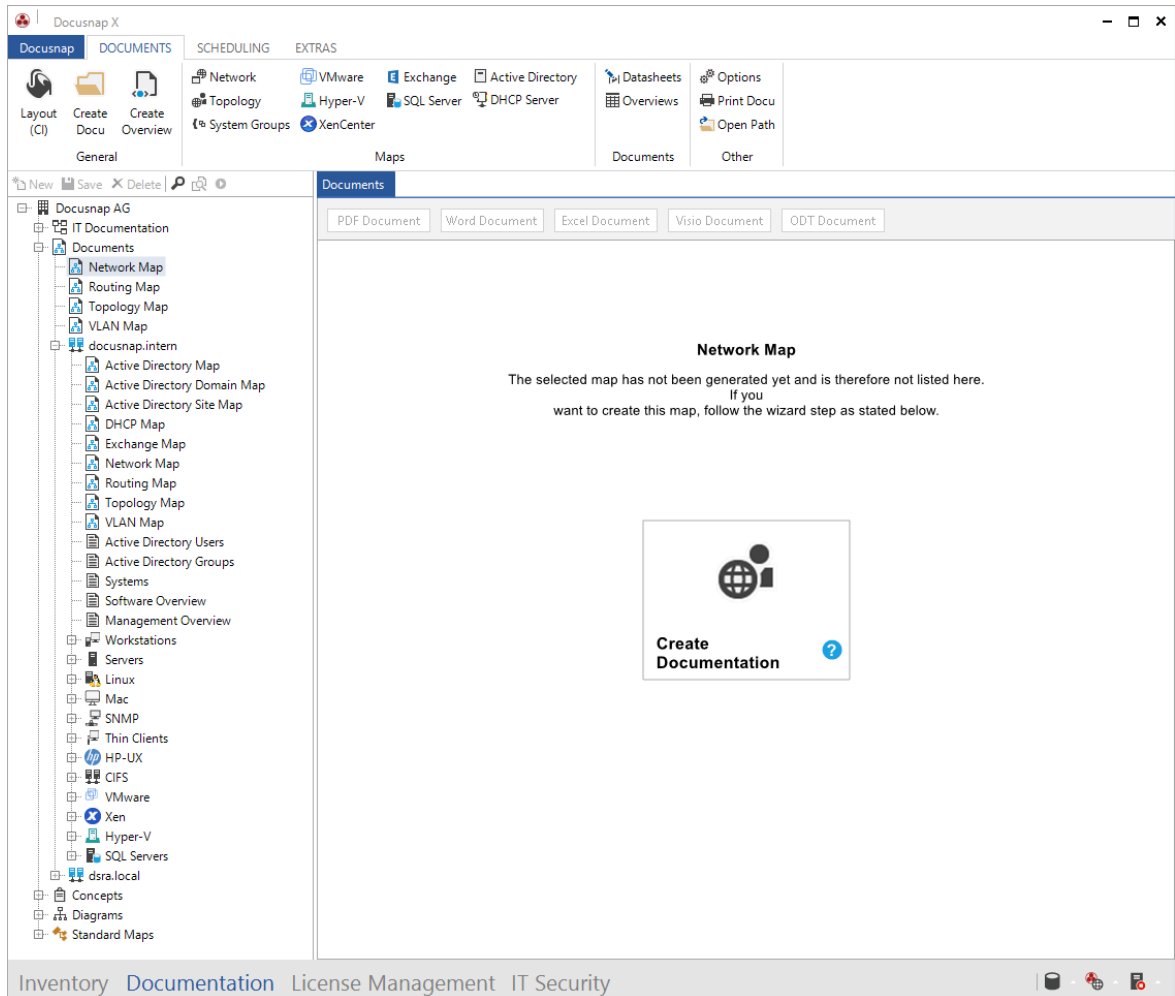
Back Next Cancel

5.3 Documentation Tree View

The Documents tree view was designed to help you manage and create your documentation and enhance the transparency of the entire process.

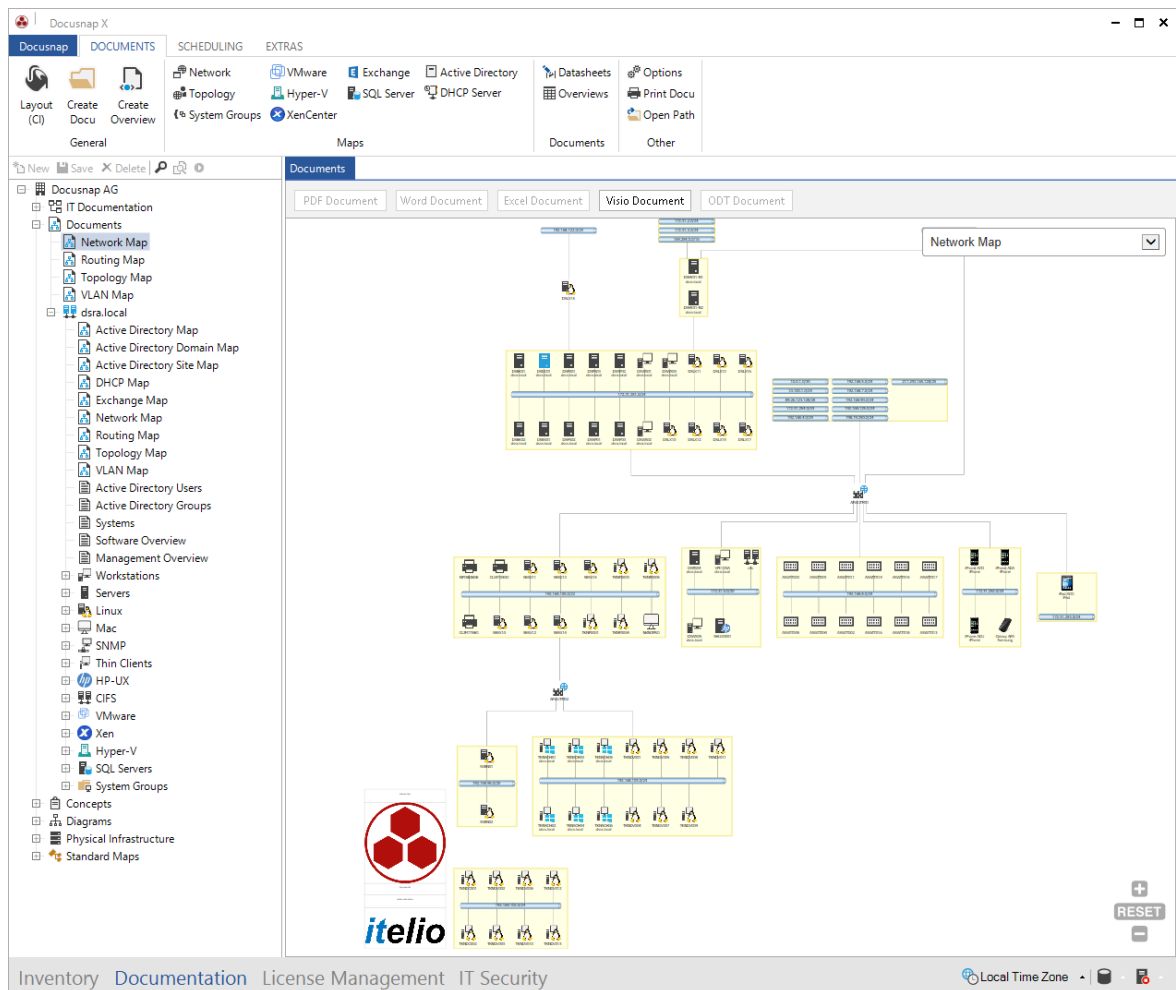
If no maps, datasheets or overviews have been created for the selected Explorer node yet, the *Documents* tab in the right pane displays a dashboard-type indicator that helps you to create the respective document. What is more, it allows you to access the specific online help for the desired map.

You can use the Dashboard as a shortcut to launch the required wizard without accessing the ribbon.



If the document exists already, the desired map is displayed instead of the Dashboard. The *PDF Document*, *Word Document*, *Excel Document*, *Visio Document* and *ODT Document* buttons allow you to display the map in the desired format. The desired format is only available if the document was created in that format.





5.4 Print Documentation

Docusnap allows you to print several datasheets and overviews simultaneously. When you create datasheets or overviews, the *Print Preparation* (.mdc) file format must be selected additionally.

To start the *Print Documentation* wizard, click the *Print Docu* button. In the *Print Settings* step, select the folder where the documents are stored. If files to be printed are located in subfolders of the selected folder, you can include them by ticking the *Recursively Search Subdirectories* checkbox. The *Depth* indicates how many subfolder levels will be included. Click the *Add* button to add the selected location to the list of directories to be searched. The documentation path that has been defined already.

If you clear the checkbox next to a folder, the documents from that folder will not be available for printing.

The selected printer will be displayed in the Print Settings area at the bottom of the dialog. A different printer, as well as additional print settings, may be selected by clicking the *Settings* button. Clicking the *Next* button takes you to the *File Selection*

step in the wizard. The *Next* button will remain disabled until a folder has been selected.

Print Documentation

1 Print Settings 2 File Selection

Add new Directory, which will be Searched for Printable Files

... Add

☐ Recursively Search Subdirectories Depth: 1

Directories to be Searched

CHECKBOX	DIRECTORY	LEVELS
<input checked="" type="checkbox"/>	C:\Docusnap\Documentation	6

Delete

Print Settings

PTESWPL01 on SPRT01 (redirected 3) Settings

Valid settings are defined.

Next Cancel

All files that have been stored in the selected folder and have the *.mdc* file format will be displayed in the file selection step. When you click the *Deselect All* button, your document selection will be undone. Only selected documents will be printed. To start the print job, click the *Next* button. The button will remain disabled until at least one document has been selected.

Print Documentation □ ×

1 Print Settings 2 File Selection

Select Directory

FILE PATH
<input checked="" type="checkbox"/> C:\Docusnap\Documentation\Docusnap AG\dsra.local\Datasheets\CIFS\cifs_en.mdc
<input checked="" type="checkbox"/> C:\Docusnap\Documentation\Docusnap AG\dsra.local\Datasheets\Linux\sex10\sex10_en.mdc
<input checked="" type="checkbox"/> C:\Docusnap\Documentation\Docusnap AG\dsra.local\Datasheets\Linux\sex11\sex11_en.mdc
<input checked="" type="checkbox"/> C:\Docusnap\Documentation\Docusnap AG\dsra.local\Datasheets\Linux\sex12\sex12_en.mdc
<input checked="" type="checkbox"/> C:\Docusnap\Documentation\Docusnap AG\dsra.local\Datasheets\Linux\sex01\sex01_en.mdc
<input checked="" type="checkbox"/> C:\Docusnap\Documentation\Docusnap AG\dsra.local\Datasheets\Linux\sex02\sex02_en.mdc
<input checked="" type="checkbox"/> C:\Docusnap\Documentation\Docusnap AG\dsra.local\Datasheets\Macintosh\nkngpro\nkngpro_en.mdc
<input checked="" type="checkbox"/> C:\Docusnap\Documentation\Docusnap AG\dsra.local\Datasheets\Servers\dsbk01\dsbk01_en.mdc
<input checked="" type="checkbox"/> C:\Docusnap\Documentation\Docusnap AG\dsra.local\Datasheets\Servers\dsdc01\dsdc01_en.mdc
<input checked="" type="checkbox"/> C:\Docusnap\Documentation\Docusnap AG\dsra.local\Datasheets\Servers\dses01\dses01_en.mdc
<input checked="" type="checkbox"/> C:\Docusnap\Documentation\Docusnap AG\dsra.local\Datasheets\Servers\dsfs01\dsfs01_en.mdc
<input checked="" type="checkbox"/> C:\Docusnap\Documentation\Docusnap AG\dsra.local\Datasheets\Servers\dsfs02\dsfs02_en.mdc
<input checked="" type="checkbox"/> C:\Docusnap\Documentation\Docusnap AG\dsra.local\Datasheets\Servers\dsfp01\dsfp01_en.mdc
<input checked="" type="checkbox"/> C:\Docusnap\Documentation\Docusnap AG\dsra.local\Datasheets\Servers\dsfp02\dsfp02_en.mdc
<input checked="" type="checkbox"/> C:\Docusnap\Documentation\Docusnap AG\dsra.local\Datasheets\SNMP\192.168.102.117\192.168.102.117_en....
<input checked="" type="checkbox"/> C:\Docusnap\Documentation\Docusnap AG\dsra.local\Datasheets\SNMP\192.168.102.125\192.168.102.125_en....
<input checked="" type="checkbox"/> C:\Docusnap\Documentation\Docusnap AG\dsra.local\Datasheets\SNMP\afwut01\afwut01_en.mdc
<input checked="" type="checkbox"/> C:\Docusnap\Documentation\Docusnap AG\dsra.local\Datasheets\SNMP\aswit001\aswit001_en.mdc

☒ Click "Next" to start the print sequence. Back Next Cancel

After the print job has been started, the dialog will display its progress. Printing can be cancelled. Once the print job has been successfully completed, it can no longer be cancelled.

Print Documentation □ ×

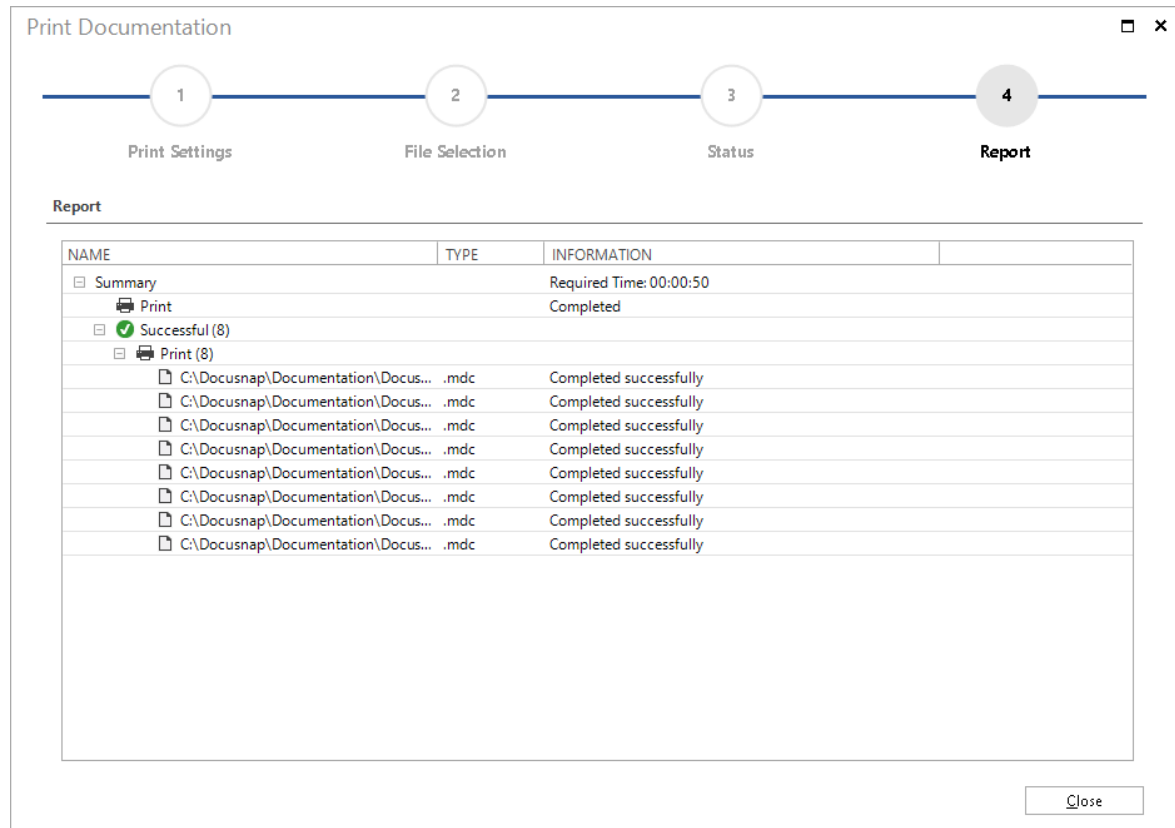
1 Print Settings 2 File Selection 3 Status 4 Report

Status des Druckvorganges

NAME	TYPE	PROGRESS IN %	INFORMATION
<input checked="" type="checkbox"/> Print	Print		Executing Process: 0 %
<input checked="" type="checkbox"/> C:\Docusnap\Documen... .mdc		<div></div>	Completed successfully
<input checked="" type="checkbox"/> C:\Docusnap\Documen... .mdc		<div></div>	Completed successfully
<input checked="" type="checkbox"/> C:\Docusnap\Documen... .mdc		<div></div>	Completed successfully
<input checked="" type="checkbox"/> C:\Docusnap\Documen... .mdc		<div></div>	Completed successfully
<input checked="" type="checkbox"/> C:\Docusnap\Documen... .mdc		<div></div>	Completed successfully
<input checked="" type="checkbox"/> C:\Docusnap\Documen... .mdc		<div></div>	Completed successfully
<input checked="" type="checkbox"/> C:\Docusnap\Documen... .mdc		<div></div>	send to printer.

Cancel

Finally, the Summary page appears to display additional information about the printing process.



5.5 Options

Settings to create the documentation can be specified in the *Configuration - Documentation* dialog. Click the *Configuration* button in the *Documents* ribbon or the *Documentation* button in the Docusnap Menu to open the dialog.

General Settings

In the *Documentation Path* field, you can specify the location where documents (overviews, data sheets, maps) will be stored when the program creates the documentation. Click the button to select the folder for storing the documents.

Changes to the font only affect the information area in the various Visio maps.

By specifying the *Document Archive Versions Limit* using the checkbox of the same name and the number field, you can set how many versions of the documents created using the [Documentation](#) module will be archived in the archive folder.

When you create maps, reports are created along with them. These are saved in the *Reports* folder which is a subfolder in the documentation path. If you do not want these reports to be created, disable the *Create Additional Reports* checkbox.

Maps can be generated in the native Visio format (.vsd) and in the Visio XML format (.vdx). You can choose which format should be created. When maps are generated with the Docusnap Server only the .vdx format can be created automatically.

Options - Documentation

GENERAL MAPS DATASHEETS IT-CONCEPT

Storage Location of Documentation results

Documentation Path: C:\Docusnap\Docu

General Settings

Font: Verdana

☐ Suppress Creation of Visio XML (.vdx) Format. (Requires MS Visio 2007 or higher)

Html Export Type: XAML

☐ Suppress Creation of Archive Versions for Documents

☒ Document Archive Versions Limit: 4

Link Documents: ☒ Create Additional Reports

OK Cancel

Maps

Network Map Settings

In network maps, it is possible to link documents to various devices and overviews. Using the *Word*, *HTML*, *PDF*, *Excel*, and *ODT* checkboxes, you can specify the document types to be linked.

Save Document Pages as Separate Documents: When creating some of the maps, the information is distributed on several tabs. By activating the *Save Document Pages as Separate Documents* option each tab is saved as a separate document. This is especially helpful for a large network, if the document cannot be saved, because of the number of tabs.

If additional tools were used when inventorying Windows systems, the results file can also be linked with the Visio maps.

When creating the network map, you can choose that network adapters created by the VMware Player/VMware Server software will be ignored. This checkbox is also available when you open the network map preview. You can change the setting there, too.

Don't Consider AutoConfig IP: Through this option the AutoConfig IP is ignored in network maps and routing maps.

Topology Maps and VLAN Visualization Settings

These settings are used as default for ad hoc maps and for creating maps via the wizard. The settings can also be adjusted during the generation of maps.

Potential Access Points: Docusnap includes uninventoried end devices in the map on the basis of CDP and LLDP. These are usually access points.

Layer3 Elementes: In the map, end devices (firewalls, server systems) are displayed if they are redundantly connected to several switches. If desired, they can be hidden.

Virtual Structures: With this option, the virtual structures are taken into account in the overview plan. You can also select whether the individual maps for the virtual structures are to be created.

Port with VLAN Information: This option displays the tagged and untagged information for the ports in the detailed maps of the switches.

Switch Details: This option defines which information is displayed for the switches.

Cable Bandwidth: This option displays the cable bandwidth for the connections.

Port Names: The name of the port can be displayed for each connection.

Virtual Switches: This option can be used to select whether the individual maps for the virtual switches should be created.

VLAN Tables: This option displays the respective VLANs as a table for switches. VLAN tables with the same content are colored the same way.

Visualize Cable Bandwidth: With this option, lines of a connection are colored differently depending on the speed and at higher speeds a thicker line is used. If the speed exceeds 10GB the line becomes blue. If the speed falls below 1GB, the line is shown in red. In the other cases the line is drawn in green.

Tunnel Connection: If a tunnel connection is known via LLDP or CDP, this option displays the connection.

Filter for Relevant VLANs: With this option, only VLANs with end devices are displayed.

Virtualization Map Settings

In the group *Virtualization Map Settings*, you can specify the VMware maps to be created by default in Docusnap. (For more information, see [VMware Maps](#).)



Communication Map Settings

For communication maps and reports, it can be defined whether ports above 1024 or above 49152 are interpreted as dynamic ports.

Options - Documentation

GENERAL MAPS DATASHEETS IT-CONCEPT

Network Map Settings

Link Documents: ☒ Visio ☒ Word ☐ Excel ☐ PDF ☒ HTML ☐ ODT

☐ Save Document Pages as Separate Documents ☐ Link Management Tools

☐ Don't Consider VMware adapter ☐ Don't Consider AutoConfig IP (169.254.x.x)

Topology Maps and VLAN Visualization Settings

☐ Potential Access Points ☒ Switch Details ☐ VLAN Tables

☒ Layer3 Elements ☒ Cable Bandwidth ☐ Visualize Cable Bandwidth

☒ Virtual Structures ☒ Port Names ☐ Tunnel Connections

☐ Port with VLAN Information ☒ Virtual Switches ☒ Filter for Relevant VLANs

Virtualization Map Settings

☐ Host to VM ☐ VM to Network ☐ Host to Network

☐ VM to Datastore ☐ Host to Datastore

Communication Map Settings

☐ Raise Dynamic Ports from 1024 to 49152

OK Cancel

Datasheets

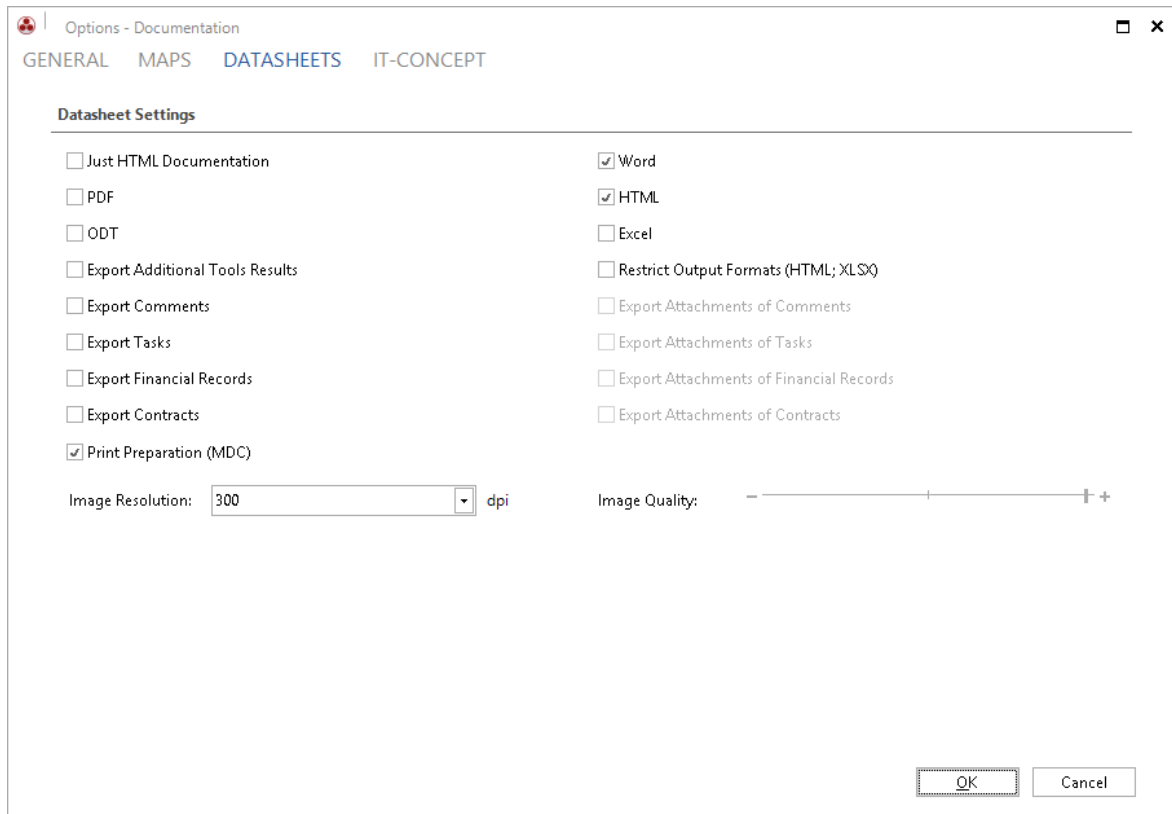
Datasheets contain a summary of the data for Windows, Server, Linux, Mac, SNMP systems and CIFS. For each device, a separate datasheet will be created. Datasheets can be created in Word, HTML, PDF, Excel or ODT format. In the *Datasheet Settings* group, you can determine which files will be created by default.

If you enable the *Export Additional Tools Results* option, the files will be saved in an additional folder below the folder containing the documents.

Additional Information can be created for all devices. In addition, you can add files as attachments to the additional information entries. The additional Information will be shown on the datasheets if the *Export Comments*, *Export Tasks* etc. checkbox is enabled. If you also check the *Export Attachments of Comments*, *Export Attachments of Tasks* etc. option, the attachments will be stored in a subdirectory and linked with the corresponding datasheet.

In Docusnap, you can send the entire set of documentation directly to a printer. To use this feature, datasheets, overviews, and other information must be saved in a special file format (.mdc). If you tick the *Print Preparation (MDC)* checkbox, all documents will be generated in this format as well.


The quality of the images contained in the documents, overviews, and maps can be defined in the *Image Resolution* field.





IT Concepts

The number of backups and versions for the IT concept are by default 10 entries per concept. The number can be adjusted in the *IT Concept* tab.





Options - Documentation



 

GENERAL MAPS DATASHEETS IT-CONCEPT

Versions & Backup



Number of Backups:

10

Number of Versions:

10

OK

Cancel

Part

VI

6 Permission Analysis

With the Docusnap Permission Analysis feature, you can determine and analyze the effective permissions for users and groups. For this purpose, comprehensive reports are available that illustrate the current permissions situation from the user or group perspective or for a certain resource (e.g. a directory).

Using filters, you can display a quick and interactive analysis of the desired situations.

Docusnap can, for example, answer the following questions:

- Which items can be accessed by employee X?
- Who has access to the HR directory?
- What combination of permissions (NTFS, shares) has been granted to a certain user?

You can perform a permission analysis for all Windows systems or for systems that support the SMB or CIFS protocol (e.g. Samba and NetApp Filer).

It is also possible to scan and analyze the permissions to SharePoint servers. SharePoint server permissions are determined while Docusnap performs a SharePoint inventory scan.

Docusnap also enables you to scan and analyze the permissions to Exchange mailboxes, mailbox folders, and public folders.

Permission Analysis is a separate Docusnap module that you can access by clicking the *IT Security* button in the Navigation pane.

In the Permission Analysis explorer, a hierarchically structured tree will be displayed that has been optimized for the needs of this module.

Structure

This section explains the structure of the Permission Analysis feature.

Inventory

Before permissions can be analyzed, it is mandatory to perform an inventory scan of the NTFS directory structures. This section explains the inventory wizard for NTFS directories. SharePoint permissions are inventoried during a SharePoint scan, Exchange permissions are read in together with the Exchange inventory scan.

Analysis

For the analysis of permissions, three functions are available.

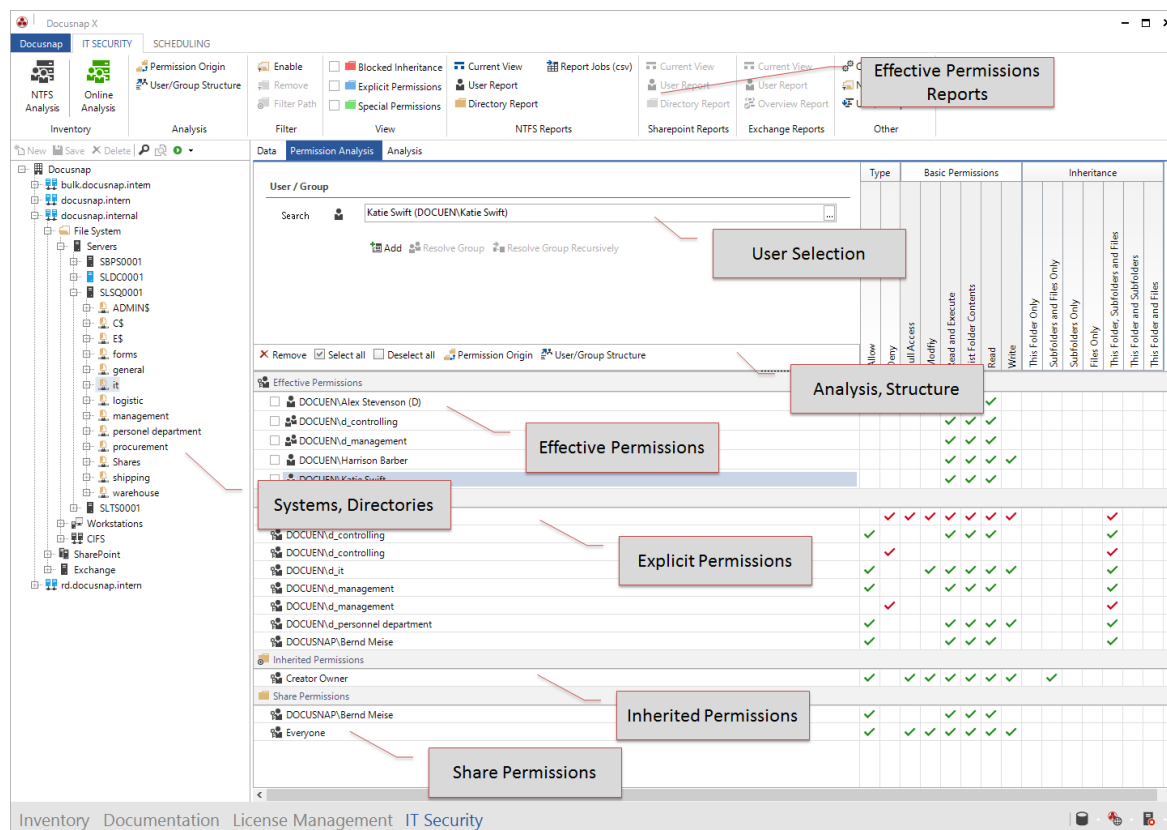
The Permission Analysis tab shows the current situation based on the permissions to a directory or SharePoint.

Analysis diagrams illustrate which criteria were used to assign an effective permission to the selected user or group.

Reports show the effective permissions a specific user has to a directory or user.

6.1 Structure

The Permission Analysis module has been subdivided into several panes so that a maximum of information can be displayed.



In the left pane, below the *File System* node, your systems, directories and shares are listed. Under the *SharePoint* node, you will find the web pages, web pages collections, and lists. Below the *Exchange* node, the *Exchange* mailboxes, mailbox folders, and public folders are displayed.

In the user selection in the right pane the users and groups for whom the effective permissions should be displayed can be added.

Below the user selection the effective permissions, the explicit permissions, the inherited permissions and the share permissions are located. Special permissions are only displayed if you have enabled the *Special Permissions* checkbox in the ribbon.

You can access the required functions and reports from a dedicated *IT Security* ribbon.



By clicking the *Permission Origin* button, you open the permission structure for the currently selected user or the currently selected group. The permission origin reveals how the user or group obtained their permissions.

Click the *User/Group Structure* button to display a diagram showing the nesting of users or groups for the selected user/group.

6.2 Menu Ribbon

The *IT Security* ribbon will be displayed when Permission Analysis has been selected from the Navigation pane. This ribbon is subdivided into four groups.

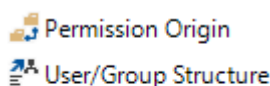
Inventory

- [NTFS Analysis](#): Click the NTFS analysis button to open the wizard to select the Windows systems, CIFS systems and DFS systems whose permissions are to be inventoried.
- [Online Analysis](#): The permissions will be determined at runtime by the Online Analysis process and thus not stored in the database. The Online Analysis process will be active once you click the *Online Analysis* button.



Analysis

- *Permission Origin*: Click the *Permission Origin* button to open the [permission structure](#) for the currently selected user.
- *User/Group Structure*: Click the *User/Group Structure* button to display the [group or user nestings](#) diagram.

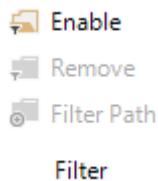


Filter

- *Enable/Remove*: The Data Explorer displays all directories of a scanned system. To display the filter below the permissions list, click the *Enable* button in the *Filter* group of the ribbon. Once you have defined the desired filter criteria (Write, Read,

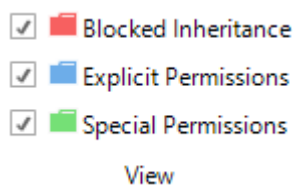
etc.), only those directories will be displayed in the Data Explorer that match the selected user or group filter.

- **Filter Path:** The *Filter Path* dialog only opens for the analysis of SharePoint permissions. Since the SharePoint permission structure is different from the structure of NTFS permissions, this dialog is used to select the desired starting point for the analysis. According to the filter you set, only the directories below the starting node that correspond to the selected users/groups will be displayed.



View

- **Blocked Inheritance:** Inheritance can be blocked for directories. This means that the permissions will not be inherited. If the *Blocked Inheritance* checkbox is enabled, the directories for which inheritance is blocked will be displayed with a red icon in the *Permission Analysis* explorer.
- **Explicit Permissions:** Permissions can be assigned directly to directories. If the *Explicit Permissions* checkbox is enabled, all directories to which permissions have been assigned explicitly will be displayed with a blue icon.
- **Special Permissions:** If this checkbox is enabled, special permissions will be displayed in addition to the basic permissions.



NTFS Reports / SharePoint Reports / Exchange Reports

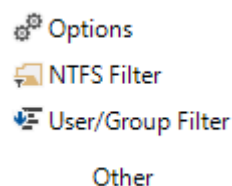
- When you click the *Current View* button, the permissions displayed on the Permission Analysis tab will be output in a report.
- By clicking the *User Report* button, you can create a report which shows the effective permissions to the selected directory and its subdirectories or for Exchange permissions to the mailboxes, mailbox folders, and public folders.
- Clicking the *Directory Report* button creates a report which displays all users who have a permission to the selected directory and its subdirectories.
- Clicking the *Overview Report* button creates a report which displays all users who have permissions to the mailboxes, mailbox folders, and public folders.

- Report Jobs (csv): By importing a CSV file multiple jobs to generate Directory Reports for NTFS can be created simultaneously.



Other

- The setting, if the number of inventoried levels for the NTFS analysis should be limited, is set in the *Configuration - Permission Analysis* dialog.
- Clicking the *NTFS Filter* option opens the *Manage NTFS Filter* dialog. In this dialog, you can specify directories to be excluded from the NTFS analysis. For an explanation of this dialog, refer to the [NTFS Filter](#) section.
- You can use the [User/Group Filter](#) to exclude selected users and groups from the directory reports.



6.3 Inventory

Docusnap uses different permission inventory processes for the file system, for SharePoint and for Exchange.

File System

Before you can start analyzing file system permissions, the systems must have been scanned using the [Network Inventory](#) function. Also, users and groups must have been inventoried with of a complete Active Directory scan. If this is the case, you can start the inventory process for NTFS permissions.

SharePoint Servers

To perform a permission analysis for a SharePoint environment, you need to scan the SharePoint servers first. Moreover, a complete Active Directory scan must have been performed in order to obtain the users and groups required for the analysis. Docusnap will determine the SharePoint permissions during the SharePoint inventory scan.

Exchange

DocuSnap will determine the Exchange permissions during the Exchange inventory scan. In order to perform a permission analysis, an Active Directory scan is required as well.

6.3.1 File System

In Microsoft environments, the effective permissions are a combination of the share permissions and the NTFS permissions. DocuSnap determines the respective shares for a system, including the permissions and the local users and groups, during the Windows inventory process. The domain users and group hierarchies are retrieved by means of the Active Directory inventory scan.

To determine the organization of NTFS systems, you need to execute an additional wizard.

For a permission analysis, the following steps are required:

1. Determining the target devices using a Windows, CIFS or DFS inventory scan
2. Scanning the Active Directory
3. Determining the NTFS directory data using the NTFS wizard
4. Analyzing and evaluating the results

Note: Steps 1 and 2 are described in the Inventory section.



In order to perform a permission analysis, you must always scan the complete Active Directory system to make sure that all groups and users will be available for analysis.

6.3.1.1 Inventory Permissions

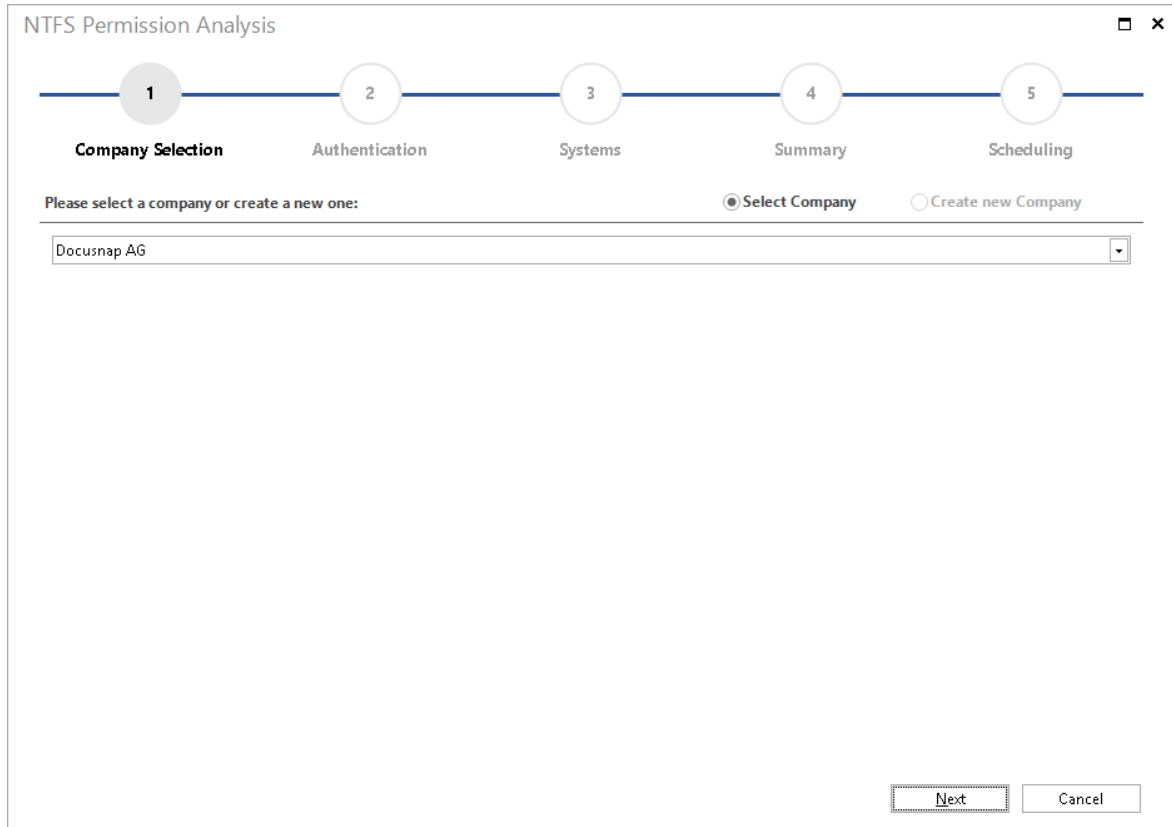
A permission analysis requires that the NTFS permissions to the directories have been stored in the database. For this purpose, you can use a wizard or the DocuSnap server.

The *NTFS Permissions* wizard can be started from the *IT Security* ribbon.



Company Selection

Unlike a network scan, a NTFS permissions scan does not allow you to create a new company. You need to select an existing company. A Windows, CIFS or DFS inventory scan must already have been performed for this company. Otherwise, it will not be possible to retrieve the permissions.



The screenshot shows the 'NTFS Permission Analysis' window with a progress bar at the top indicating five steps: 1. Company Selection, 2. Authentication, 3. Systems, 4. Summary, and 5. Scheduling. Step 1 is currently active. Below the progress bar, the text 'Please select a company or create a new one:' is followed by two radio buttons: 'Select Company' (which is selected) and 'Create new Company'. Below these options is a text box containing 'Docusnap AG' and a dropdown arrow. At the bottom right of the window, there are two buttons: 'Next' and 'Cancel'.

Authentication

Please note that only existing domains in a company may be selected for authentication. After you have selected the domain, Docusnap will display the user name and password that were used for creating the network inventory. If desired, you can also enter the credentials of another user. Aside from this, you can also use the name and password of the currently logged-on user to perform the inventory scan. In this case, only select the domain and leave the *User Name* and *Password* fields blank. Afterwards, click the *Check Credentials* button to check if the user is a member of the domain and if the proper password has been entered. After successful authentication, the *Next* button will be enabled.

NTFS Permission Analysis

1 Company Selection 2 **Authentication** 3 Systems 4 Summary 5 Scheduling

Authentication

Refresh Edit Discovery Service Server Connection

	DISCOVERY SERVICE	HOST NAME
<input checked="" type="checkbox"/>	Server-VPC-JEI	VPC-JEI
<input type="checkbox"/>	Client-VPC-JEI	VPC-JEI

Domain: dsra.local

User Name: dsra\administrator

Password: *****

☒ Save User Name and Password

Check Credentials

Authentication successful

Back Next Cancel

Systems

All Windows systems that have been scanned will be displayed on the *Systems* page. In addition, it lists all drives on the corresponding systems. Alternatively, the individual shares of a system can be listed by checking the checkbox *Use Shares for Windows Systems*. Use the checkbox next to each system to indicate whether the permissions for that system are to be scanned or not. If a system has multiple drives, a separate system entry will be listed for each drive. If the checkbox *Use Shares for Windows Systems* is checked, then all the shares of a system are available for selection. Thus, the scope of the permission scan can be selected individually for every system. The [Filter](#) group is displayed on the right. Using a filter, you can filter the systems list for individual values.

For systems based on the SMB or CIFS protocol, such as NetApp Filer or Samba Server, the available shares rather than the local drives will be displayed for selection on the those systems.

Likewise for DFS systems, all existing shares will be available for selection.

If the checkbox *Scan Folder Size* is selected, the folder size is inventoried for each folder. Otherwise, each folder will be displayed with the size 0. To determine the folder size for large folders can prolong the duration of the inventory.

If you wish to exclude a directory from the inventory scan, you can specify this exclusion in the [Manage NTFS Filter](#) dialog. When you add a directory to this list, all

its subdirectories will be excluded from the analysis as well. For example, this is helpful for user profiles or temporary Internet directories.

NTFS Permission Analysis

1

2

3

4

5

Company Selection
Authentication
Systems
Summary
Scheduling

☒ Analyze Permissions on Following Systems

☐ Scan Folder Size
☐ Use Shares for Windows Systems

<input checked="" type="checkbox"/>	HOST NAME	DRIVE	FREE SPACE	CAPACITY
<input checked="" type="checkbox"/>	DSFS01	C	12,05 GB	39,90 GB
<input checked="" type="checkbox"/>	DSSP03	C	20,29 GB	49,51 GB
<input checked="" type="checkbox"/>	SMBC0001	C	11,65 GB	39,90 GB
<input checked="" type="checkbox"/>	SMDC0001	C	13,46 GB	39,90 GB
<input checked="" type="checkbox"/>	SMDC0001	E	3,08 GB	4,00 GB
<input checked="" type="checkbox"/>	SMDC0001	F	4,56 MB	253,00 MB
<input checked="" type="checkbox"/>	SMDC0001	G	22,16 GB	40,00 GB
<input checked="" type="checkbox"/>	SMDC0002	C	11,19 GB	19,99 GB
<input checked="" type="checkbox"/>	SMDC0002	E	1,98 GB	1,99 GB
<input checked="" type="checkbox"/>	SMDC0003	C	25,28 GB	40,00 GB
<input checked="" type="checkbox"/>	SMDC0003	E	974,94 MB	1021,00 MB
<input checked="" type="checkbox"/>	SMDC0004	C	467,90 MB	39,90 GB
<input checked="" type="checkbox"/>	SMDC0004	E	0,00 B	1021,00 MB
<input checked="" type="checkbox"/>	SMDC0004	F	18,51 MB	80,00 GB
<input checked="" type="checkbox"/>	SMEX0003	C	55,13 GB	99,90 GB
<input checked="" type="checkbox"/>	SMFS0002	C	36,01 GB	39,90 GB

Select

☒ Select all

☐ Deselect all

Other

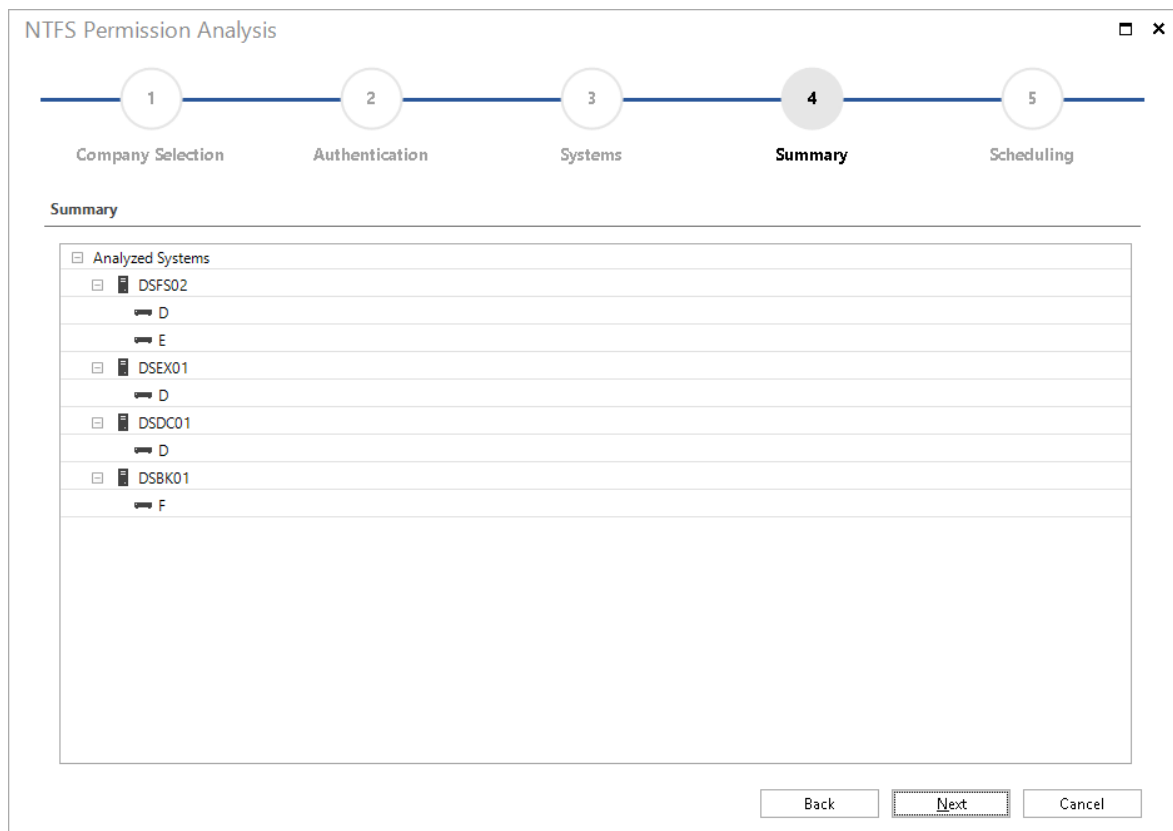
Excel Export

Disable Filter

Back
Next
Cancel

Summary Page

All systems and drives to be inventoried will be listed on the *Summary* page.



Scheduling

By using the [scheduling](#) feature, you can specify a later time for the automatic start of the permission scan. In the scheduling window, you can indicate whether the scan should be performed only once or repeatedly.

In order to use this feature, the Docusnap Server component must be configured on a system in the network.

Status

After the process has started, this page will display the progress of the inventory scan. If you wish to abort the inventory process, click the *Cancel* button. The NTFS permissions of all scanned systems with the *Completed* status will be written to the database. Permissions for systems where the scan process has not yet been completed will not be saved.



NTFS Permission Analysis

...

4

5

6

7

Steps 1-3
Summary
Scheduling
Status
Report

Status

NAME	TYPE	PROGRESS IN %	INFORMATION
Discovery	Discovery	<div></div>	Executing Process
Server-VPC-JEI	DDS	<div></div>	
NTFS			
DSDC01 D:\	NTFS	<div></div>	Inventory completed
DSFS02 D:\	NTFS	<div></div>	Permission Analysis. 300 Folders have been s...
DSBK01 F:\	NTFS	<div></div>	Inventory completed
DSEX01 D:\	NTFS	<div></div>	Inventory completed
DSFS02 E:\	NTFS	<div></div>	Permission Analysis. 200 Folders have been s...

Cancel

Summary Page

The *Report* page displays how many systems have been successfully inventoried. To exit the wizard, click the *Close* button.

NTFS Permission Analysis

Steps 1-3 Summary Scheduling Status **Report**

Report

NAME	TYPE	INFORMATION
Summary		Required Time: 00:00:59
Server-VPC-JEI		
NTFS		
NTFS (5)		
DSBK01 F:\	NTFS	Inventory completed
DSDC01 D:\	NTFS	Inventory completed
DSEX01 D:\	NTFS	Inventory completed
DSFS02 D:\	NTFS	Inventory completed
DSFS02 E:\	NTFS	Inventory completed

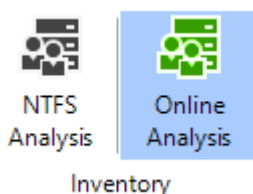
Close



During the inventory scan, there may be no connection to the target system if a different user than the one logged on to the desktop was specified. Microsoft only allows one single connection to a target system during a session and would otherwise generate an error.

6.3.1.2 Online Analysis

You can start the Online Analysis process from the *IT Security* ribbon. Just like the normal analysis, the Online Analysis process uses the share permission, user and group data from the database. Only the NTFS permissions and the directory structures will be loaded directly from the network for each item clicked in the hierarchy.



The Online Analysis process allows you to create the tree view without having to execute the *NTFS Permissions* wizard first. In principle, the Online Analysis process works exactly like a permission scan, with the difference that the data will not be stored in the database and only the permissions for the directory that is currently



open in the tree view will be scanned. The Online Analysis process will use the credentials of the currently logged-on user. For this reason, the user who has logged on must have the right to access the NTFS permissions for the system.

To enable this feature, click the *Online Analysis* button. When it is enabled, the permissions will be re-scanned from the network as soon as you open directories and subdirectories.



Since the Online Analysis process does not write data to the database, it is not possible to create reports in this mode.

6.3.1.3 NTFS Filter

When performing a [permission analysis](#), Docusnap scans the permissions users and groups on existing directories.



Use the *Manage NTFS Filter* dialog to define which directories should be included or excluded from the analysis.

It is possible to specify directories that should be inventoried, to exclude directories that are not needed in the permission analysis, or to define a combination of included and excluded directories.

The specification to include directories is only used when permissions for certain directories are of interest, for example who has access to directories which contain client data or project information.

Definitions to exclude directories are used to exclude big folder structures like *Windows* or *Program Files*.

The conditions can be grouped and linked with either *AND* or *OR*.

Click the button  to add another row. Click the button  to delete the current row.

▪ Operator





In the column *Operator* you can choose between *Contains* or *Not Contains*. Wildcards can be used to specify the selection in greater detail.

- Contains: The specified condition must match the directory.
- Not Contains: The specified condition must not match the directory.

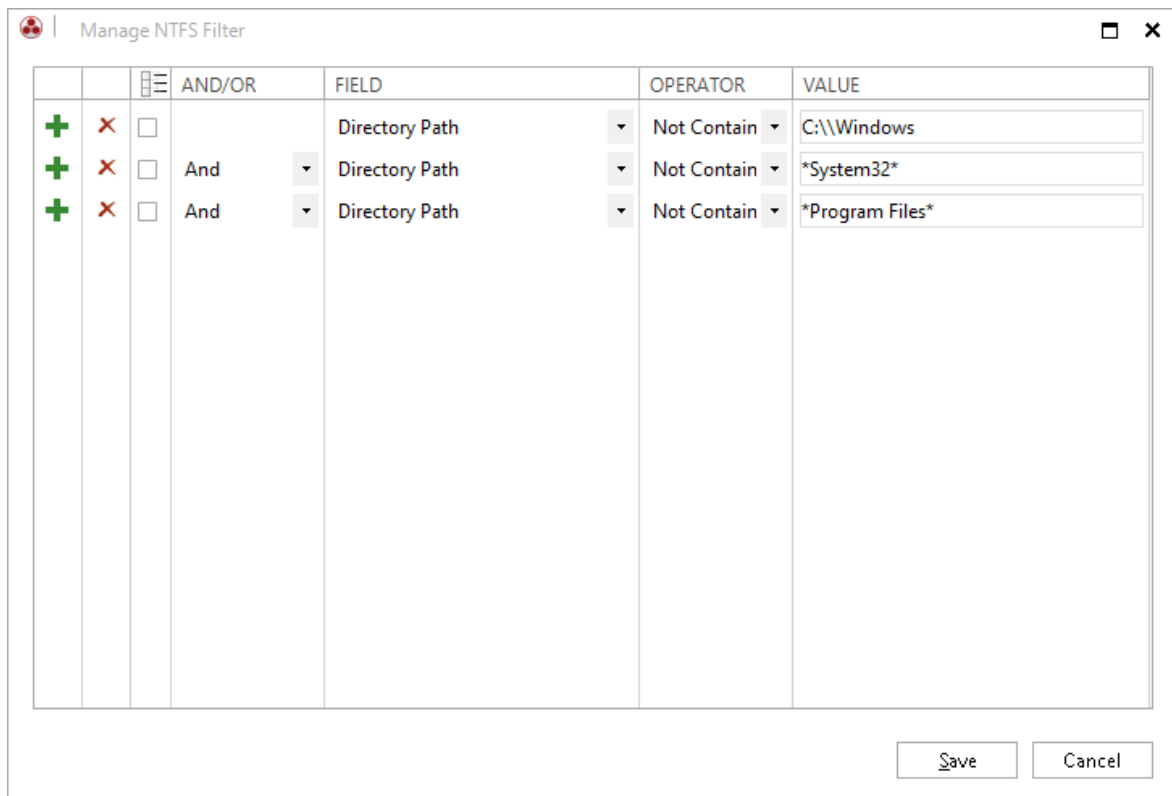
▪ And/Or

Once several directories are specified, select in the *And/Or* column whether the conditions should be linked with *And* or *Or*. If the terms are linked with *And*, then all conditions have to apply to the directory. If the conditions are linked with *Or*, only one of the terms has to match the directory.

■ Grouping

Use grouping to nest the conditions as needed. For example two terms can be linked with *Or* and then be extended with *And* to include another condition. Click the checkbox to select the conditions, then click the  button to group the selected entries to one condition. Only conditions listed one below the other can be grouped. The button  marks the start of the group. Click the  button to revoke the grouping. It is possible to organize the grouping in several levels. Select more than one group and click on the  button to group them into one condition.

Click *Save* to apply the settings.



			AND/OR	FIELD	OPERATOR	VALUE
+	-	<input type="checkbox"/>		Directory Path	Not Contain	C:\\Windows
+	-	<input type="checkbox"/>	And	Directory Path	Not Contain	*System32*
+	-	<input type="checkbox"/>	And	Directory Path	Not Contain	*Program Files*



If the full name of the directory is specified, then the time needed for the inventory of the NTFS permissions can be shortened, since these directories can be skipped during the inventory.

6.3.2 SharePoint

The SharePoint permissions to web page collections, web pages and lists have already been scanned during the SharePoint inventory process. For this reason, an additional wizard is not necessary.

To start the wizard for inventorying SharePoint servers, click the *SharePoint* button on the Inventory ribbon. The *SharePoint* step will be displayed after you have selected a company and a domain and entered your credentials (see: [Basic Steps](#)).



Inventory

1 Company Selection 2 Authentication 3 **SharePoint** 4 Summary 5 Scheduling

☒ Inventory SharePoint Server

☒ Inventory Job History 5 Entries

Edit Systems

SharePoint: DSSP01

User:

Password:

☐ Server Authentication

New Save Delete

<input checked="" type="checkbox"/>	NAME	SECURITY	INFO
<input checked="" type="checkbox"/>	DSSP01	Global Credenti...	Connection successful
<input checked="" type="checkbox"/>	DSSP02	Global Credenti...	Connection successful

i Inventory of the SharePoint server is only possible with farm administrator authentication.

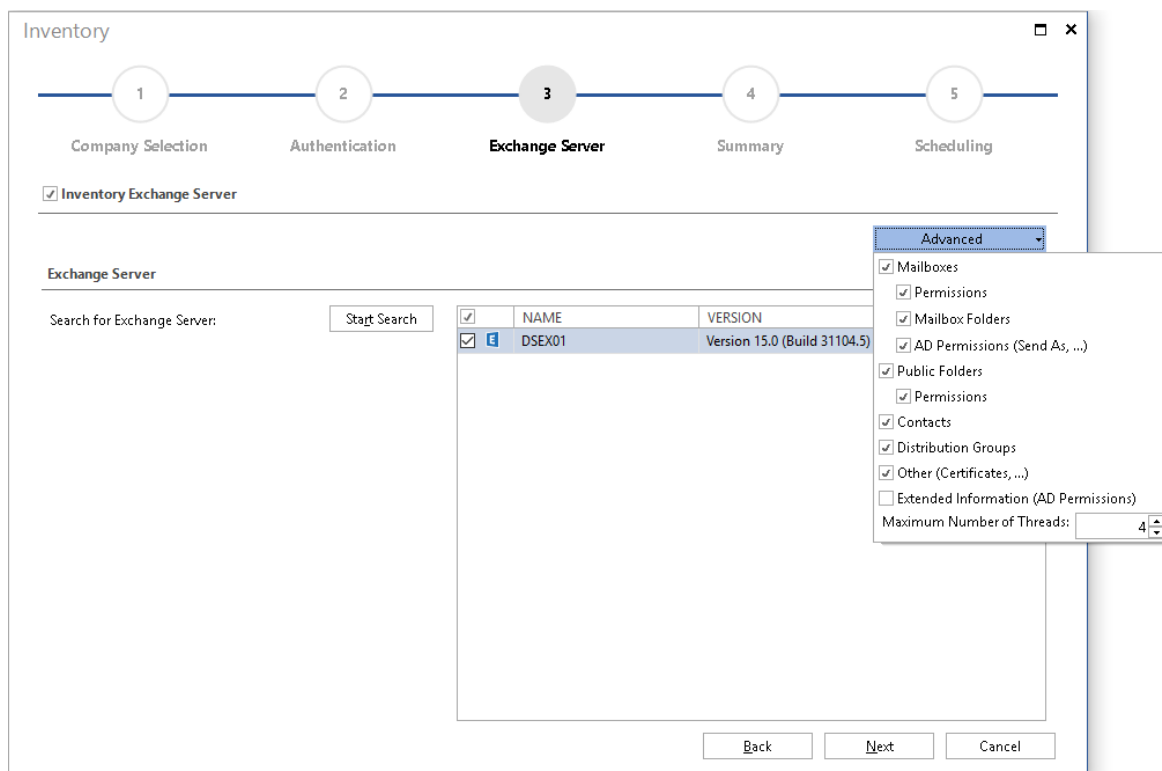
Back Next Cancel

There are two ways to scan SharePoint servers: You can either use *global credentials* for login. In this case, only the name of the SharePoint server is required for the scanning process. Or you log in using *specific credentials*. For this purpose, you need to enable the *Server Authentication* checkbox. Then, you can enter the required user name and password. After the desired systems have been added to the SharePoint Server table, you can specify whether the inventory process should be performed for the corresponding system or not by enabling / disabling the checkbox next to each system. The *Next* button will only be enabled once you have specified a SharePoint server. Then, you can continue with the inventory process.

6.3.3 Exchange

The permissions of users and groups to Exchange mailboxes, mailbox folders, and public folders are retrieved during an Exchange inventory scan.

Click the *Exchange* button in the *Inventory* ribbon to launch the corresponding wizard. First, you need to select a company and enter your credentials (see: [Basic Steps](#)). Then, the *Exchange* step will be displayed.



6.4 Analysis

For the analysis of permissions, three functions are available.

Permission Analysis

From the Permission Analysis tab, you can see the current state of permissions to a folder, SharePoint server, or to Exchange mailboxes, mailbox folders, and public folders.

Analysis Diagrams

These diagrams illustrate which criteria were used to assign an effective permission to the selected user or group.

Determining the Effective Permissions

The goal of each permission analysis is to show the effective permissions to a certain directory or for a certain user.

6.4.1 Permission Analysis



When, in the Permission Analysis tree view, you select a node below the *File System*, *SharePoint*, or *Exchange* nodes for which permissions have been scanned, the main window displays an additional tab named *Permission Analysis*.

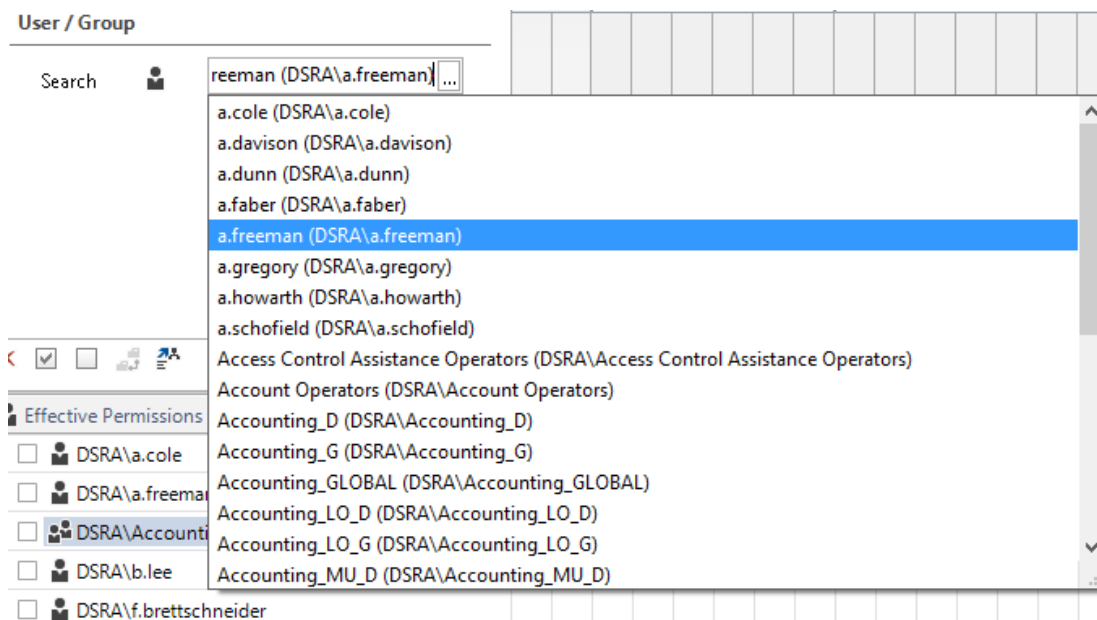
The *Permission Analysis* tab shows the *Explicit Permissions*, the *Inherited Permissions* and the *Share Permissions*.

Effective Permissions


In order to retrieve the *effective permissions* for a user or a group, select the desired entry from the *User Selection*.

There are different possibilities to add users and groups.

Enter the name of the wanted user or the wanted group. Users are identified by the  icon and groups by the  icon. Once the first letter is entered, the matching entries are suggested. Users and groups can be added via enter key, selection via the mouse from the suggestion list or via click on the *Add* button. Users are added to the list immediately. After selecting a group the options are to add all the direct users of this group, to add the direct users and the users of subordinate groups or to add the group.



Click the  button in the *Search* text box to open the *Advanced Search* dialog.

The names of the users and groups, who should be added, can be entered into the *Search* text box in the *User Selection*. All users and groups, who were selected in the *Advanced Search* dialog, are displayed in the *Selected User/Groups* field. Click the  button if you want to remove the according entry.

Click the *Advanced* button to refine the search for active directory users and groups further. Enter the name of the wanted entries in the *Identities* text box. It is possible to just enter a part of the name in this text box and all users and groups who contain this string are listed and can be selected. With the wildcard "%" intermediate parts can be omitted. Select the wanted entries with the according checkbox and click the *Apply* button to add the users and groups.

Search for Groups and Users

Identities:

<input checked="" type="checkbox"/>	NAME	USER NAME	USER PRINCIPAL NAME
<input type="checkbox"/>	Abgelehnte RODC-Kennwortreplik...	DOCUSNAP\Abgelehnte RODC-Ke...	
<input type="checkbox"/>	Angela Marbach	DOCUSNAP\Angela Marbach	A.Marbach@docusnap.intern
<input type="checkbox"/>	Backdoor	DOCUSNAP\Backdoor	^Backdoor@docusnap.intern
<input type="checkbox"/>	Backup_Service	DOCUSNAP\Backup_Service	Backup_Service@docusnap.intern
<input type="checkbox"/>	Beate Brezbaur	DOCUSNAP\Beate Brezbaur	B.Brezbaur@docusnap.intern
<input type="checkbox"/>	Benutzer	DOCUSNAP\Benutzer	
<input type="checkbox"/>	Bernd Garthuber	DOCUSNAP\Bernd Garthuber	B.Garthuber@docusnap.intern
<input type="checkbox"/>	Bernd Meise	DOCUSNAP\Bernd Meise	B.meise@docusnap.intern
<input type="checkbox"/>	BULKS	DOCUSNAP\BULKS	
<input type="checkbox"/>	D"Elia Carbonada	DOCUSNAP\D"Elia Carbonada	D"Elia.Carbonada@docusnap.intern
<input type="checkbox"/>	D_Anlagenbuchhaltung	DOCUSNAP\D_Anlagenbuchhaltu...	
<input type="checkbox"/>	D_Arbeitsvorbereitung	DOCUSNAP\D_Arbeitsvorbereitung	
<input type="checkbox"/>	D_Bohren	DOCUSNAP\D_Bohren	
<input type="checkbox"/>	D_Lohnbuchhaltung	DOCUSNAP\D_Lohnbuchhaltung	
<input type="checkbox"/>	D_Nacharbeit	DOCUSNAP\D_Nacharbeit	
<input type="checkbox"/>	D_Oberflächen	DOCUSNAP\D_Oberflächen	
<input type="checkbox"/>	D_Schlifflabor	DOCUSNAP\D_Schlifflabor	
<input type="checkbox"/>	Derick Belfor	DOCUSNAP\Derick Belfor	D.Belfor@docusnap.intern
<input type="checkbox"/>	DHCP-Benutzer	DOCUSNAP\DHCP-Benutzer	

Click the *Show Filter* button to open the filter. The filter provides the ability to select users and groups through the definition of one or more conditions.

Click the button to add another row. Click the button to delete the current row.

▪ Field

The column *Field* lists all ADS properties for users and groups. Depending on the selected property different operators and suggestions are offered. For *User Account Control* the different options like *Account activated* are provided. If the property is a string the first twenty entries are displayed. Subsequently the suggestion list can be filtered by tipping the first letters of the wanted entry. For properties which are a period of time a date has to be given in MM/DD/YYYY or MM.DD.YYYY format. To find users and groups who for example don't have an expiry date, enter as value the word "*never*" instead of a date.

▪ Operator





The column *Operator* provides several operators.

- Contains: The specified value must be contained in the properties of the user or the group.
- Not Contains: The specified value must not be contained in the properties of the user or the group.
- Starts with: The value of the user or group must begin with the specified value.

- Ends with: The value of the user or group must end with the specified value.
 - =: The value of the user or group has to match the specified value exactly.
 - <>: The value of the user or group must not match to the specified value.
 - <=,>=,<,>: The value of the user or group has to be less than or equal (<=), greater than or equal (>=), less than (<) or greater than (>) the specified value.
- And/Or

Once several conditions are specified, select in the *And/Or* column whether the conditions should be linked with *And* or *Or*. If the terms are linked with *And*, then all conditions have to apply to the user or the group. If the conditions are linked with *Or*, only one of the terms has to match the user or the group.

▪ Grouping

Use grouping to nest the conditions as needed. For example two terms can be linked with *Or* and then be extended with *And* to include another condition. Click the checkbox to select the conditions, afterward click the  button to group the selected entries to one condition. Only conditions listed one below the other can be grouped. The button  marks the start of the group. Click the  button to revoke the grouping. It is possible to organize the grouping in several levels. Select more than one group and click on the  button to group them into one condition.

Click the *Search* button to list the users and groups who match the specified filter.

If a term is entered in the *Identities* text box, then the users and groups are filtered by this search term and the specified conditions.

Click the *Save Filter* to save the specified conditions in an XML file. When the *Advanced Search* is opened the next time, click the *Load Filter* button to recover the conditions from the XML file so they don't have to be defined again.

Select the wanted entries with the according checkbox and click the *Apply* button to add the users and groups.

Permission Analysis

Search for Groups and Users

Identities:

		AND/OR	FIELD	OPERATOR	VALUE
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		User Account Control	=	Account Activated
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	And	Department	Contains	Docusnap
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Or	Department	Contains	KFI
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	And	Last Logon	>	01/01/2013
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	And	Account Expires	=	never

<input checked="" type="checkbox"/>	NAME	USER NAME	USER PRINCIPAL NAME
<input type="checkbox"/>	Abgelehnte RODC-Kennwortreplik...	DOCUSNAP\Abgelehnte RODC-Ke...	
<input type="checkbox"/>	Angela Marbach	DOCUSNAP\Angela Marbach	A.Marbach@docusnap.intern
<input type="checkbox"/>	Backdoor	DOCUSNAP\Backdoor	^Backdoor@docusnap.intern
<input type="checkbox"/>	Backup_Service	DOCUSNAP\Backup_Service	Backup_Service@docusnap.intern
<input type="checkbox"/>	Beate Brezbaur	DOCUSNAP\Beate Brezbaur	B.Brezbaur@docusnap.intern
<input type="checkbox"/>	Benutzer	DOCUSNAP\Benutzer	
<input type="checkbox"/>	Bernd Garthuber	DOCUSNAP\Bernd Garthuber	B.Garthuber@docusnap.intern
<input type="checkbox"/>	Bernd Meise	DOCUSNAP\Bernd Meise	B.meise@docusnap.intern
<input type="checkbox"/>	BULK\$	DOCUSNAP\BULK\$	
<input type="checkbox"/>	D"Elia Carbonada	DOCUSNAP\D"Elia Carbonada	D"Elia.Carbonada@docusnap.intern
<input type="checkbox"/>	D_Anlagenbuchhaltung	DOCUSNAP\D_Anlagenbuchhaltu...	

Afterwards all added users and groups are listed in the *Selected User/Groups* field. Click the *Apply* button to add the users and groups below the *Effective Permissions* heading and display their associated permissions to the selected directory.

When a different node is selected, the users and groups will not be deleted. The effective permissions will be recalculated for the selected node and the selected users or groups. The users and groups are only deleted if you select a node from a different company since the selected users and groups are not part of this company. Click the *Permission Origin* button to display the analysis of the permissions for the selected user or group. To display the group memberships of the selected user or group click the *User/Group Structure* button.

To delete an entry check the checkbox of a user or a group and click the *Remove* button.



Data		Analysis																
User / Group				Type	Basic Permissions						Inheritance							
Search																		
				Allow	Deny	Full Access	Modify	Read and Execute	List Folder Contents	Read	Write	This Folder Only	Subfolders and Files Only	Subfolders Only	Files Only	This Folder, Subfolders and Files	This Folder and Subfolders	This Folder and Files
<div>✖ Remove ☑ Select all ☐ Deselect all 🔗 Permission Origin 👤 User/Group Structure</div>																		
Effective Permissions																		
<input type="checkbox"/> 👤 DSRA\Accounting_D																		
<input checked="" type="checkbox"/> 👤 DSRA\Administrator (L) (E)						✓	✓	✓	✓	✓	✓							
<input type="checkbox"/> 👤 DSRA\j.brettschneider (L) (E)							✓	✓	✓	✓	✓							
<input type="checkbox"/> 👤 DSRA\h.lawrence (L) (E)							✓	✓	✓	✓	✓							
Explicit Permissions																		
<input checked="" type="checkbox"/> 👤 DSRA\Administrators				✓			✓		✓		✓	✓						
Inherited Permissions																		
<input checked="" type="checkbox"/> 👤 Creator Owner				✓		✓	✓	✓	✓	✓	✓						✓	
<input checked="" type="checkbox"/> 👤 DSRA\Accounting_LO_D				✓			✓	✓	✓	✓	✓						✓	
<input checked="" type="checkbox"/> 👤 DSRA\Accounting_MU_D				✓			✓	✓	✓	✓	✓						✓	
<input checked="" type="checkbox"/> 👤 DSRA\Accounting_NY_D					✓	✓	✓	✓	✓	✓	✓						✓	
<input checked="" type="checkbox"/> 👤 DSRA\Administrators				✓		✓	✓	✓	✓	✓	✓						✓	
<input checked="" type="checkbox"/> 👤 DSRA\Domain Admins				✓			✓	✓	✓	✓	✓						✓	
<input checked="" type="checkbox"/> 👤 Local System				✓		✓	✓	✓	✓	✓	✓						✓	
Share Permissions																		
<input checked="" type="checkbox"/> 👤 Everyone				✓		✓	✓	✓	✓	✓	✓							

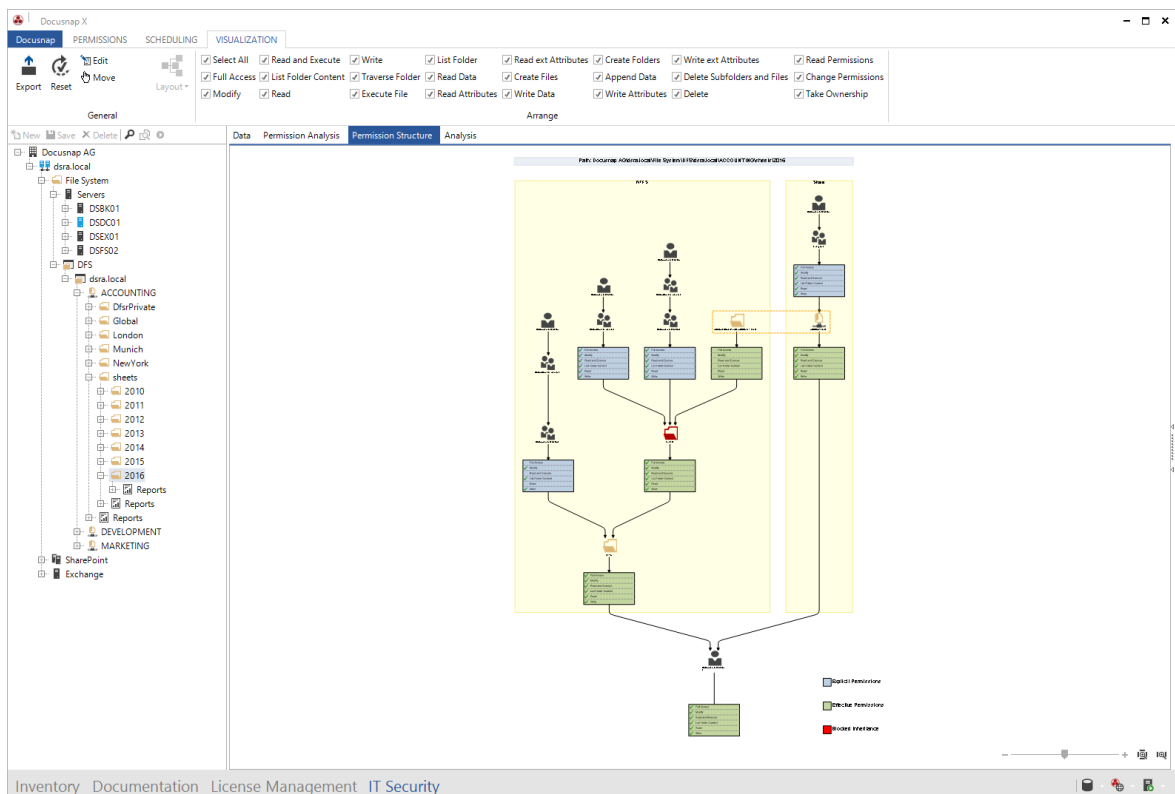
Filters

The Data Explorer displays all directories of a scanned system. To display the filter below the permissions list, click the *Enable* button in the *Filter* group of the ribbon. Once you have defined the desired filter criteria (Write, Read, etc.), only those directories will be displayed in the Data Explorer that match the filter set for the selected user or group.

6.4.2 Analysis Diagram

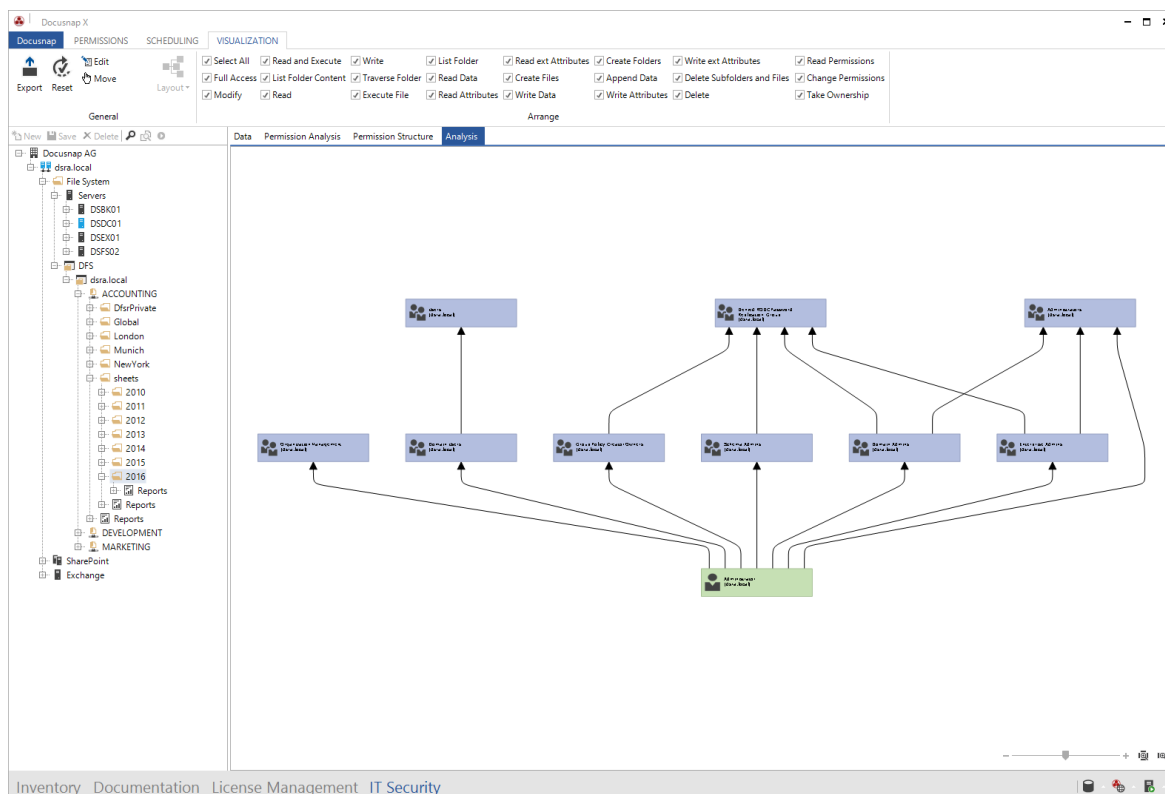
The [Permission Analysis](#) tab displays the effective permissions for the selected user or group. Effective permissions consist of various permissions, such as NTFS and share permissions, explicit permissions and inherited permissions. In the diagram, you can see how a user or group obtained a certain permission.

Click the *Permission Origin* button to open an additional tab where the origin of the permission of the selected user or group is displayed. This button is available on the ribbon and on the *Permission Analysis* tab.



The *Analysis* tab shows which groups the selected user belongs to or which users are members of the selected group. Click the *User/Group Structure* button to open the *Analysis* tab for the selected group or user.





6.4.3 Determining the Effective Permissions

In the Permission Analysis module several different reports can be generated. One report shows the effective permissions for specific users to one or more directories. All users who have a permission to a specific directory will be shown in the second report. The third report, *Current View*, includes the permissions that are currently displayed on the *Permission Analysis* tab.

In addition, it is possible to create a report for Exchange which lists the permissions of selected users or groups to the mailboxes, mailbox folders, or public folders. The Exchange Overview report lists all users who have permissions to the mailboxes, mailbox folders, and public folders.

Click the button *User Report*, *Directory Report* or *Overview Report* to open the wizard to generate the reports.

To create the user reports at least one user or group has to be selected in the *User Selection* before opening the wizard.



The selected node will be used as the starting point.

Levels

A hierarchical tree structure displays the entries for the file system, the SharePoint environment, and the Exchange servers. You can specify the number of sub-levels to be included in the report by setting the *Levels* field to the desired value. To include all levels, tick the *Show All Levels* checkbox.

Settings

If you enable the *Show Only Changes* checkbox, only those entries will be displayed where the effective permissions of the selected users or groups have changed. If this checkbox is not enabled, all directories, SharePoint entries, Exchange mailboxes, etc. and the corresponding user and group permissions to these items will be shown.

When calculating the effective permissions the share and NTFS permissions are used, taking into account the inheritance of permissions. By selecting the checkbox *Ignore Share Permissions*, only the NTFS permissions are analyzed.



By enabling the *Show Only Changes* option, you can significantly reduce the resulting number of report pages and thereby improve the readability of the report

For directory reports additional settings can be determined.

If you check the *Include Default Groups (e.g. Everyone)* option, the users of default groups will also be included. Since domain administrators have full access to all directories in most cases, you can exclude them from the reports by enabling the *Exclude Domain Administrators* checkbox. If the *Show Only Groups* checkbox has been enabled, only the permissions for groups, and not those for individual users, will be included.

Display Options

Usually, the report will show three blocks of permissions (effective, share and NTFS). Using the respective checkboxes you can hide or unhide information.

If the *Special Permissions* checkbox is enabled, the *Special Permissions* will be shown. Otherwise, the report will only show the *Basic Permissions*.

The *Show Creator Owner* checkbox can be used to specify whether users who have been granted permissions to the folder based on the *Creator Owner* group should be included in the report.

If the *Show Only Activated Users* checkbox is selected, only active users are displayed in the report. Even if disabled users have directory privileges, they are not listed in the report.

Other

For the user, directory and overview reports three different output formats are provided.

- Horizontal report:

The horizontal report lists directories, users/groups and permissions one underneath the other.

- Vertical report:

The vertical report displays the directories, users/groups and permissions in a matrix.

- Excel:

When in the wizard the output format *Excel* is selected, the data is exported directly into an excel file. The file is saved in the documentation path below the respective domain.

(\Documentation
Point\Reports\PermissionsDirectory) or

Path\Company\Domain\Starting


(\Documentation
Point\Reports\EffectivePermission)

Path\Company\Domain\Starting

The report displays the Netbios name of the users and groups by default. In the *AD User as* combobox, you can define whether the *Display Name*, *Netbios Name*, the *Name*, or *User Principal Name* is used in the report.

You can use the *Add AD Property* option to specify AD properties, that are then displayed for the users and groups in the report.

User/Group Filter

With the *User/Group Filter* users or groups can be excluded from the directory report. This can be useful, for example, so users and groups, that are not of interest, or who have access to all directories, are not listed in the reports. In the *List* combo box defined lists of users and groups can be added. These are compiled in [User/Group Filter](#) dialog. Click the *Add* button to add the users and groups of the selected list. Via the *Search* text box, users and groups can be added individually. Once the first letter is entered, the matching entries are suggested. Users and groups can be added via click on the *Add* button. Click the  button in the *Search* text box to open the *Advanced Search* dialog. The selection of users and groups in the [advanced search](#) works the same way as when you add the user for the analysis of the effective permissions. For groups you can select via the *Resolve Recursively* checkbox, if only direct users of this group should not be considered or if the users of the subordinate groups will also not be listed in the reports. Click the *Remove* button to delete a currently selected entry.

Generate Report

1

Directory Permissions

C\$

Levels: ☐ Show all Levels

Settings

☒ Show Only Changes
☐ Ignore Share Permissions
☒ Include Default Groups (e.g. Everyone)
☐ Exclude Domain Administrators
☐ Show Only Groups

Display Options

☒ Show Effective Permissions
☒ Show NTFS Permissions
☒ Show Share Permissions
☐ Special Permissions
☒ Show Creator Owner
☐ Show Only Activated Users

Other

Report Format:
AD User as:
AD Property:

User/Group Filter

List:

Search:

NAME	RESOLVE RECURSIVELY
DSRA\f.brettschneider	<input checked="" type="checkbox"/>
DSRA\A.davison	<input checked="" type="checkbox"/>
DSRA\Account Operators	<input type="checkbox"/>

The report may be exported to various file formats. Click the *Export* button on the *Reporting* ribbon and select the desired format. Clicking the desired format opens a dialog where you can select the pages to be exported. Click the + sign to expand the Settings group. Then, you can select format-specific settings. If the file should automatically be opened after the save, enable the *Open After Export* checkbox.

Scheduling

With Docusnap, you can schedule the creation of reports and have them generated automatically at a later point in time.

Click the *Schedule* button to open the next step. In case you do not want to create the report using the predefined directory (documentation path), specify an alternative path. By default, the documentation path defined for the Docusnap Server will be used. If you specify an *alternative documentation path*, that path will be used. In addition the language can be chosen.

Generate Report

1

2

3

4

Directory Permissions

Company Selection

Report

Scheduling

Select Company

Docusnap AG

Documentation Path

☐ Alternative Documentation Path

C:\Docusnap\Documentation

Options

Language:

English

☐ Just HTML Documentation

Company Selection: A company is selected.

Back

Next

Cancel

In the next step, you can select the desired report format. The following formats are available: docx, xlsx, html, odt and pdf.

Additionally, you can specify here whether to include a cover page, a header and a footer in your report. If you do not make any changes, the settings from the *Layout (CI)* dialog will be used.

If you tick the *E-Mail Distribution* checkbox, the report will be sent to the e-mail address(es) specified below. Even if *E-Mail Distribution* is enabled, the reports will always be saved to the specified *documentation path*.

Generate Report

1 2 3 4

Directory Permissions Company Selection **Report** Scheduling

Distribution Options:

☒ Header ☒ Footer ☒ Cover

Paper Size: Letter

Distribution

☒ E-Mail Distribution

Recipient: info@docusnap.com

Subject: Directory Report

Message:

Advanced

- ☒ Create DOCX
- ☒ Create HTML
- ☐ Create PDF
- ☐ Create XLSX
- ☐ Create ODT
- ☐ Print Preparation (MDC)

Back Next Cancel

In the last step, you can define scheduling details. This step determines when and how often the report will be created. Click the *Finish* button to save the task.



Scheduling will only work if the Docusnap Server service has been set up.

Generate Report

1

2

3

4

Directory Permissions
Company Selection
Report
Scheduling

☒ Schedule Report

Name:

Every 2 week(s) on: Monday at 09:00:00. Schedule will be used from 01.07.2019.

Schedule Type:

Frequency

Interval:

Recurring every: week(s) on:
☒ Monday
☐ Tuesday
☐ Wednesday
☐ Thursday
☐ Friday
☐ Saturday
☐ Sunday

Frequency per day

☒ Once at:

☐ Every:

Start:
End:

Duration

Start Date:
☒ No End Date
☐ End Date:

Back

Finish

Cancel

Report Jobs

Additionally it is possible to schedule the Directory Report for several shares simultaneously and send it to a defined e-mail address. Thereby a CSV file is imported where the desired shares are listed. Click the *Report Jobs (csv)* button to open the wizard. Select the company in which the shares are located. In addition, an alternative documentation path and the language can be selected.

Report Scheduling

1 Company Selection 2 CSV Import 3 Directory Permissions 4 Report 5 Scheduling

Select Company

DocuSnap AG

Documentation Path

☐ Alternative Documentation Path C:\DocuSnap\Documentation

Options

Language: English ☐ Just HTML Documentation

✓ Company Selection: A company is selected. Next Cancel

In the next step, the CSV file is imported. In the CSV file the values for *Domain*, *Host*, *Share* and *E-Mail* must be listed in that order separated by ";". If the desired shares are in a DFS structure, you must additionally write (*DFS*) behind the host so that the respective shares can be found.

For example:

```
dsra.local;DSBK01;E$;DocuSnap@docuSnap.intern
dsra.local;DSFS02;G$;DocuSnap@docuSnap.intern
dsra.local;DSFS03;D$;DocuSnap@docuSnap.intern
dsra.local;dsra.local (DFS);HR;DocuSnap@docuSnap.intern
dsra.local;dsra.local (DFS);External;DocuSnap@docuSnap.intern
```

For each entry is checked whether the share was inventoried for the specified host in the specified domain. The report can only be scheduled, if the directories and permissions for the specified share are available. When executing the job the report will be sent to the specified email address. If no email address is specified, the report will only be saved in the specified documentation path. Check the respective

checkbox to select the shares for which a task should be created. The CSV file can be created and edited using Excel or a text editor.

Report Scheduling

1 Company Selection 2 **CSV Import** 3 Directory Permissions 4 Report 5 Scheduling

CSV Import

File: C:\Docusnap\JobShares.csv

☐ First Row as Header

<input checked="" type="checkbox"/>	DOMAIN	HOST	SHARE\PATH	MAIL	
<input checked="" type="checkbox"/>	dsra.local	DSBK01	E\$	Docusnap@docusnap.co...	
<input checked="" type="checkbox"/>	dsra.local	DSFS02	G\$	Docusnap@docusnap.co...	
<input checked="" type="checkbox"/>	dsra.local	DSFS03	D\$	Docusnap@docusnap.co...	
<input checked="" type="checkbox"/>	dsra.local	dsra.local(DFS)	HR	Docusnap@docusnap.co...	
<input checked="" type="checkbox"/>	dsra.local	dsra.local(DFS)	External	Docusnap@docusnap.co...	


Back Next Cancel

Click the *Next* button to switch to the *Directory Permissions* step. In this step, the options for generating the report are selected which have already been described in this chapter. After the format of the report and the subject for the email are defined in the *Reporting* step, you can define in the step *Scheduling* when the jobs should be executed. Click the *Finish* button to create a job for every selected share, which will be executed at the scheduled time.

6.4.4 User/Group Filter

The directory report lists all users or groups, which have a permission to a specific directory. In the *User/Group Filter* users and groups can be defined that are to be excluded from the report. After that, the defined lists are displayed in the wizard and can be selected.

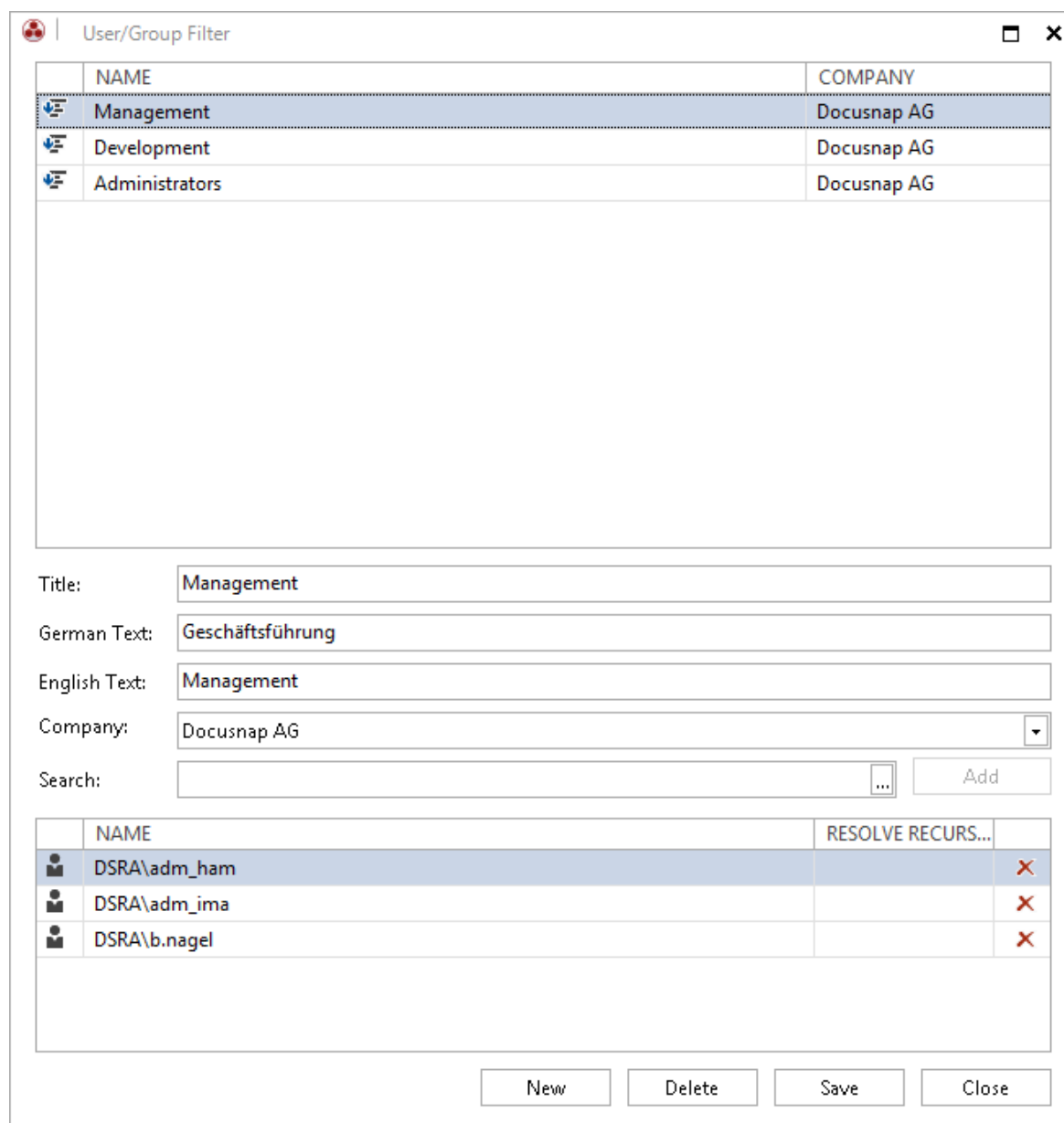
Click the *User/Group Filter* button in the *IT Security* ribbon to open the *User/Group Filter* dialog. Via the *New* button a new list is created. For every list a title and a designation in English and in German is required. Select in the Company list field, the company for which the list of users and groups should be defined. Enter the name of the wanted user or the wanted group in the *Search* text box. Once the first letter is entered, the matching entries are suggested. Users and groups can be added via click on the *Add* button.

Click the  button in the *Search* text box to open the *Advanced Search* dialog. The selection of users and groups in the [advanced search](#) works the same way as when you add the user for the analysis of the effective permissions.




For groups you can select via the *Resolve Recursively* checkbox, if only direct users of this group should not be considered or if the users of the subordinate groups will also not be listed in the reports.

Click the  button to delete the respective entry.

Click the save button to save the new list or the changes.



The dialog box 'User/Group Filter' contains two tables and several input fields. The top table lists groups with columns 'NAME' and 'COMPANY'. The bottom table lists users with columns 'NAME', 'RESOLVE RECURS...', and a delete button. Below the tables are input fields for Title, German Text, English Text, Company, and Search, along with 'New', 'Delete', 'Save', and 'Close' buttons.


	NAME	COMPANY
	Management	Docusnap AG
	Development	Docusnap AG
	Administrators	Docusnap AG







Title:

German Text:

English Text:

Company:

Search: 

	NAME	RESOLVE RECURS...	
	DSRA\adm_ham	<input type="checkbox"/>	
	DSRA\adm_ima	<input type="checkbox"/>	
	DSRA\b.nagel	<input type="checkbox"/>	

The users and groups that should be excluded, can also be defined in the *Directory Permissions* wizard. If the same users and groups are excluded regularly from the report, the user/group filter offers the advantage that the list must be only defined once.

6.5 Options

Settings for the execution of the inventory of permissions can be specified in the *Options - Permission Analysis* dialog. Click the *Options* button in the *IT Security* ribbon or the *Permission Analysis* button in the Docusnap Menu to open the dialog.

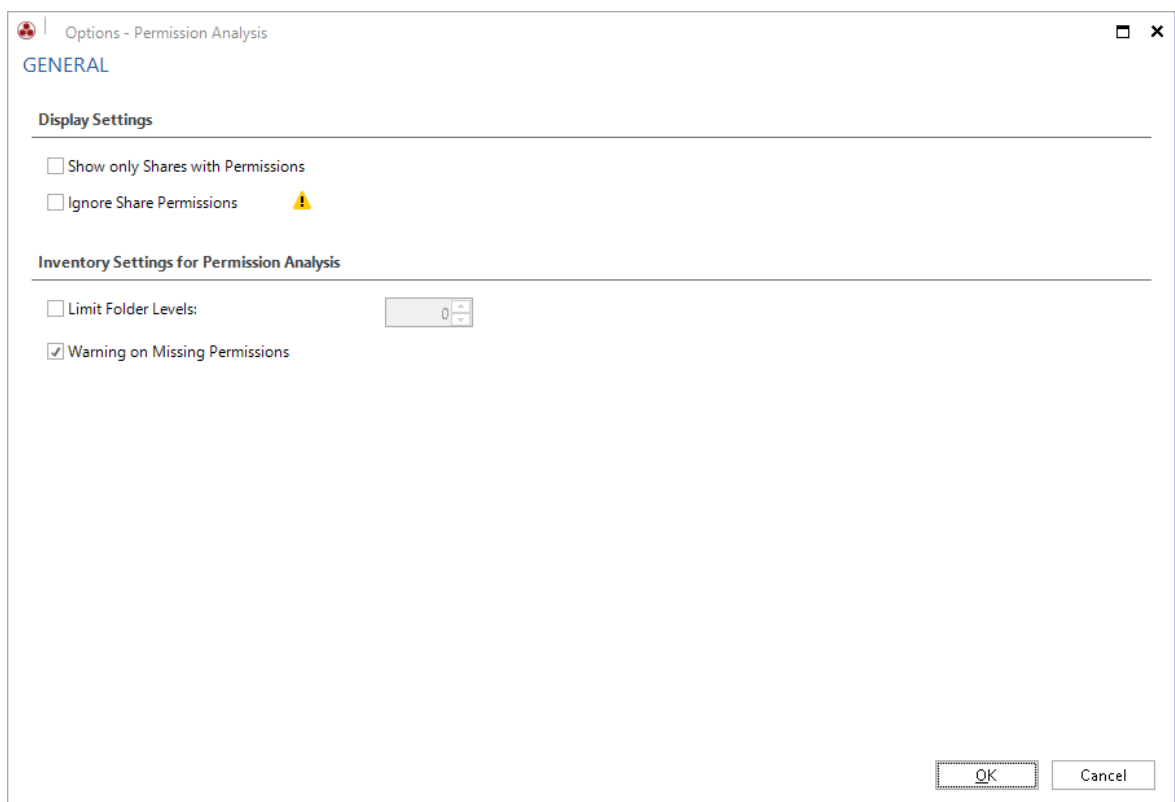
General

When performing the inventory scan of NTFS permissions, the system will read the permissions of all folders on the selected systems. The *Limit Folder Levels* option allows you to specify the number of folder levels to be scanned. This can be helpful if, starting with a certain level, the permissions are always inherited.

Through the check box *Warning on Missing Permissions* you can determine whether warnings should be displayed for the NTFS inventory.

When the checkbox *Show only Shares with Permissions* is checked, only shares, for which permissions exist, are displayed in the Permission tree view.

The option *Ignore Share Permissions* means that no analysis of the effective access permissions takes place. Only the explicit NTFS permissions are analyzed.



The screenshot shows the 'Options - Permission Analysis' dialog box with the 'GENERAL' tab selected. The dialog has a title bar with a red icon, the text 'Options - Permission Analysis', and standard window controls (minimize, maximize, close). The main content area is divided into two sections: 'Display Settings' and 'Inventory Settings for Permission Analysis'. In the 'Display Settings' section, there are two checkboxes: 'Show only Shares with Permissions' (unchecked) and 'Ignore Share Permissions' (unchecked) with a yellow warning triangle icon to its right. In the 'Inventory Settings for Permission Analysis' section, there is a 'Limit Folder Levels' checkbox (unchecked) next to a numeric spinner box set to '0', and a 'Warning on Missing Permissions' checkbox (checked). At the bottom right of the dialog are 'OK' and 'Cancel' buttons.

Part



7 License Management

The Docusnap License Management allows you to enter the license agreements for purchased software based on the respective licensing model. Docusnap then associates the installed software base with the license agreements and detects any over-licensing or under-licensing situation. Docusnap is able to map all common variants of licensing models, such as per-device, per-user, per-processor, and per-core licensing. Of course, this also allows for upgrading and downgrading as well as for terminal server licensing. Comprehensive features which are suitable to map nearly all use cases relevant to licensing are available, all evaluations being performed at the company level. Some selected examples for such evaluation options will be given in a [separate section](#).

The dataset on which License Management is based consists of the software found during the most recent [Network Scan](#) of the systems inventoried in the network. All software installations found will be considered, regardless of the device type or the installed operating system, provided that they have been enabled in the License Management options. In addition, all installations found through the Software Search process, as well as manually entered software products will be included in the License Management evaluations.

Basically there are two ways how the software products are assigned to licensing. Docusnap provides a list of installed software products for which a license can be created. In license management wizard, these products can then be assigned to licensing. As a result all installations of this software product are counted for this licensing. Alternatively you can also use search words. These keywords help you to determine the [Software Products](#) found on the inventoried systems. This means that, e.g., different versions of the same software product can be easily covered just by specifying appropriate keywords. An [in-depth explanation](#) of the use of keywords and the possibilities they offer will be given in the description of the *License Management* wizard.

The so-called *Software Product* form the core component of the License Management module. Each *Software Product* in the Docusnap License Management sense is a software product, installed in one of the inventoried systems, that needs to be organized. In the tree structure, the software products are displayed in two different ways. All software products and systems of this company are taken into account in the licenses below the respective group. With Docusnap you can create sites. These sites can be allocated to systems and software products. The licenses for this sites are then displayed under the *Sites* heading and only systems that have been assigned to this site are taken into account.

To each software product, you can assign multiple licenses. These licenses in Docusnap correspond to the real-life software licenses actually purchased and the software contracts signed. From the registered licenses, the License Management

module knows how many installations of the software may be found during the inventory process before under-licensing occurs. Depending on the licensing type, the assigned [devices](#) or [users](#) a license has been issued for are located below each license.

Below the *Installations* heading the License Management tree view contains several nodes for performing various analyses which will be discussed in a [separate section](#). The [Undesired Products](#) node represents a special issue regarding software that should not be found on the target systems. The License Management module provides many comprehensive evaluations in the form of reports.

7.1 General

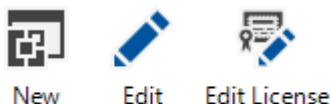
The *License Management* ribbon displays after the License Management option has been selected in the Navigation pane.

Licenses

Clicking the *New* button will start the [License Management wizard](#). The desired license can be created using this wizard.

The data can be edited using the wizard. Clicking the *Edit* button will open the *License Management* wizard with the data for the selected software product, which may then be edited.

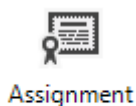
Clicking on the *Edit License* button opens the wizard at the step Licenses to skip all previous steps if only the license should be modified.



Software Product

Software Product

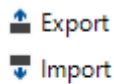
Click the *Assignment* button to open the *Software Product Licensing* dialog. In this dialog all inventoried software products are listed and can be assigned to product licensing.



Software List

Definition

The settings for software groups, software products, search keywords and licenses can be exported and imported into other databases. This means that a software product must only be defined once and can then be re-used with other Docusnap databases.

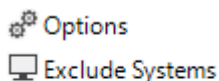


Definition

Other

The setting of which software products are suggested in the license management, can be determined in the *Options - License Management* dialog.

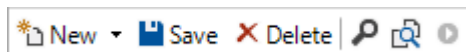
If you want to exclude software pertaining to certain systems, e.g. software used in a test environment, the corresponding systems may be excluded from license management. To exclude such systems, either click the *Exclude Systems* button or use the editor in the [Data Explorer](#) hierarchy of the specific system.



Other

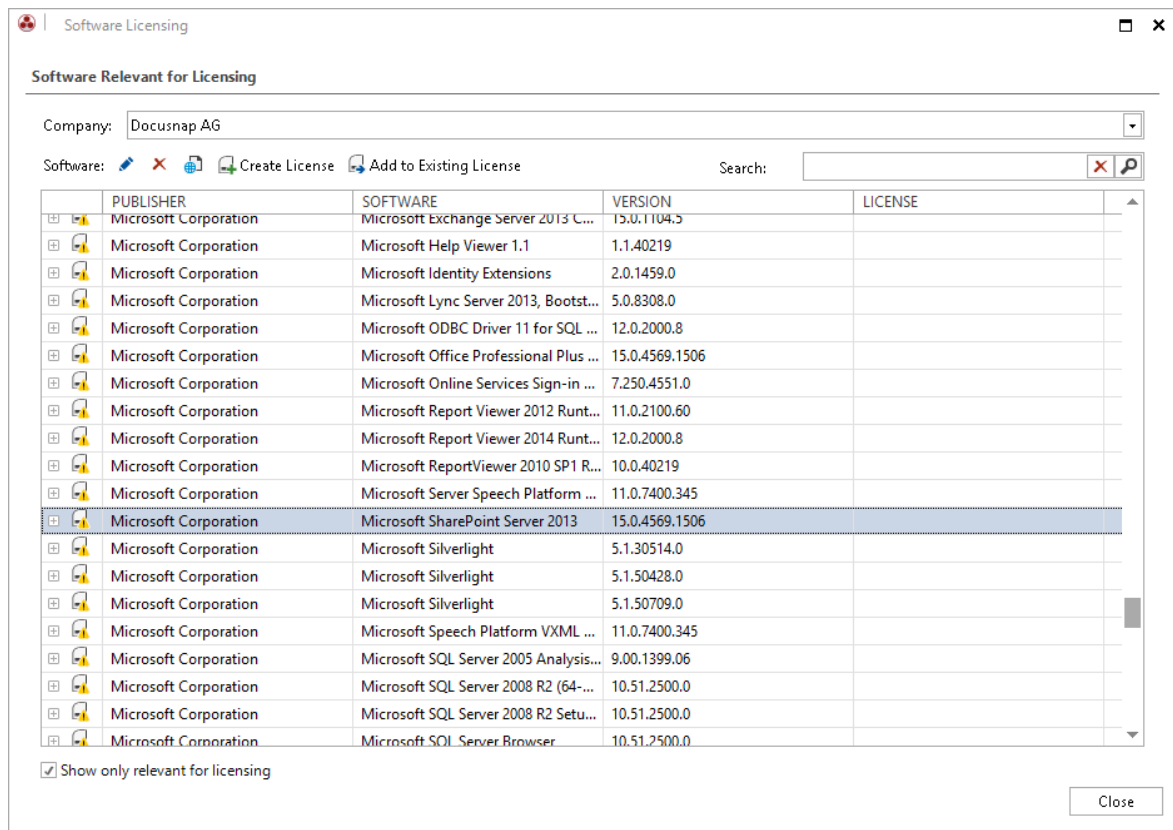
Edit

In general, you can create and edit software products by using the [License Management](#) wizard. It is possible to edit existing software products with the [Editor](#) tab. Make sure to restrict manual edits to minor changes.



7.2 Software Product Licensing


Click the *Assignment* button in the *Software Product* group to open the *Software Licensing* dialog. This dialog lists all software products with the respective versions, which were found at least once on an inventoried system and are not yet assigned to a license.



- **Company:** Use the *Company* combobox to select the company from which the software products should be listed.
- **Edit Software Product:** Click the button to open the currently selected software product for editing. To edit multiple software products simultaneously select the respective software products, by using the Ctrl or Shift key and clicking on the software products. Then click on the button to open the dialog for editing all of the selected software products.
- **Delete Software Product:** Software products can be deleted, but only products which were not found with the latest inventory. If the product is, however, still installed, it will be found again at the next inventory and re-entered in the list. Click the button to delete the selected software product.
- **Look up Software Product:** By clicking on the button the selected software product is looked up on the Web.
- **Create License:** By clicking on the *Create License* button the license management wizard opens. The name of the currently selected software product is used as a descriptive name.
- **Add to Existing License:** By clicking the *Add to Existing License* button, a dialogue with all already created licenses opens. All selected software products will be assigned to the licensing selected in the dialog.



- Search: In the textbox for the search, a search term is entered, which is then compared with the manufacturer, the software and the version. Then all software products which contain this term are displayed.

If you click the  button all systems on which this software product is installed are displayed.

To also list software products for which a license has been created, the checkbox *Show only relevant for licensing* must be deactivated.

7.3 License Management Wizard

The easiest way to create new software products or to edit existing entries in the License Management module is by using the *License Management* wizard. The wizard for creating a new license can be opened in the *Software Product Licensing* dialog for software products or on the *Licenses* ribbon by clicking on the *New* button. If a software product or a node at a level below it is selected in the tree view, you can click the *Edit* button to open that software product for editing in the *License Management* wizard.

Depending on the selected options, the License Management Wizard features a varying number of steps.

7.3.1 Company

If the *License Management* wizard is started by clicking on the *New* button a company must be selected for which the licensing should be created. When the wizard was opened with the *Software Licensing* dialog, no company needs to be chosen because the company was already defined in the dialog.

Since all evaluations in the License Management module are performed at the company level, the selection determines which data will be available in the wizard.

In addition to the company also sites can be selected for which the evaluation of the software product can be generated. On site level, only systems that have been assigned to this site are considered for the evaluation. In the next wizard steps, systems are only displayed in the selection lists, if they have been assigned to one of the selected sites.

If no site is selected, all systems of the selected company are listed and no site-related evaluation is made available for this software product.

License Management

1

2

3

4


...


Account
Group
Software Product
Exclude Systems
Steps 5-11

Please select a company:

Company:
DocuSnap

☐ DefaultSite
☒ Munich
☐ 1st floor
☐ 2nd floor
☐ Basement
☒ London
☐ Boston


In the next wizard steps, systems are only displayed in the selection lists, if they have been assigned to one of the selected sites. If no site is selected, all systems of the selected company are listed.


Company Selection: A company is selected.

Next
Cancel

7.3.2 Group

Each [software product](#) must be assigned to a specific group. The software groups ultimately help with the ability to present and evaluate the whole catalog of inventory clearly and enable detached consideration of products in separate groups. Either an existing group may be selected, or a new group created, during this step. The fact that a new group will only be saved after the successful completion of the License Wizard should be kept in mind. In the event that the License Wizard is terminated, a newly created group will be lost. Aside from this, several groups can be created at the same time during this wizard step, however a software product may only be assigned to one specific software group. Each group name must be unique for each company, in order to avoid confusion.

License Management

1 Account 2 **Group** 3 Software Product 4 Exclude Systems ... Steps 5-11

Select Group

Group: Microsoft OEM

Create a New Group

Group Name: Microsoft OEM

Description: **B / U** abc | Arial 10
Mit hardware erworbene OEM-Lizenzen

A valid group is selected.

New Save Abbrechen Back Next Cancel

7.3.3 Licensing

In this step, you can define the software products, which are at the core of the Docusnap License Management, by specifying their most important attributes. For identification, the product name, the publisher and the version are used, similarly to the information Docusnap collects when automatically inventorying the software on the scanned computers. You must enter the product name here. Details about the publisher and the version are optional, but specifying them is highly recommended as they help to generate meaningful evaluations. However, the values entered here are only used for display in the program and in the evaluations. They do not affect the analysis procedures in any way.

Every software product is assigned to a specific metric. This assignment defines the basic settings, such as the type of licensing, for the product. The metric you select here determines whether it will be possible to use [keywords](#) and define [system assignments](#) or [user assignments](#) in later wizard steps. Use the Docusnap Management to add metrics or edit existing ones. The property *Detection of Use* of the metric indicates if the product recognition is used to find software, or if you have to enter the number of used licenses manually. With the license metric *Devices and Users* it is possible to create licenses for devices and users. The device licenses are used for calculating the license balance, the user licenses are listed additionally.

Whether the licensing is an [undesired software product](#) is determined by selecting the metric *Blocked software products*. Undesired software products are displayed under a separate node in the License tree structure, allowing a quick overview. They may later be evaluated separately. This topic will be discussed further in a [separate section](#).

You can also determine whether the software is hosted on a terminal server.

Optionally, you can also select upgrade and downgrade versions of the current software product.

You can also specify additional information on the current [software product](#), i.e. details for which not dedicated entry or selection fields are available. As with other descriptive fields, you can enter any desired text here. This can be, for example, special licensing conditions, instructions for use or notes about the licensing method used in the company. This is also the place where you can enter cross-references to other products or information from the software vendor.

The screenshot shows the 'License Management' dialog box with a progress bar at the top. The progress bar has five steps: 1 (Account), 2 (Group), 3 (Software Product), 4 (Exclude Systems), and 5 (Steps 5-12). Step 3 is currently selected and highlighted.

Below the progress bar, the 'Properties' section contains the following fields and options:

- Software Product:** Microsoft SQL Server 2012
- Publisher:** Microsoft Corporation
- Version:** (empty field)
- ☒ With Detection of Use
- Metric:** Device license (dropdown menu)
- ☒ Add Upgrade/Downgrade
- ☐ Licensed software products available on Terminal Server

Below the 'Properties' section is the 'Additional Information' section, which features a rich text editor with a toolbar containing bold, italic, underline, text color, background color, font face (Arial), font size (10), bulleted list, numbered list, link, unlink, and other icons. The text area is currently empty.

At the bottom of the dialog, there is a yellow information bar with the text: 'If you intend to assign multiple software products to the licensing, fill in, if necessary, only the...'. To the right of this bar are three buttons: 'Back', 'Next', and 'Cancel'.

Metrics

Docusnap provides different metrics by default. Each metric defines whether the *Detection of Use* is applied or not.

For each metric it is selected which calculation basis should be used. The following calculation bases are available:

- **No Assignment:** If no assignment is selected, the number of systems on which the software was found is used for the calculation. No mapping means that no devices or users are assigned to the licenses.
- **Hosts:** The calculation uses the number of systems on which the software was found. In addition, you can define in the wizard step [System Assignment](#) on which devices the software should be installed. This assignment is then taken into account in the tree when wanted and unwanted installations are evaluated.
- **Users:** In the [User Assignment](#) wizard step you can assign the users and groups that use this software. When calculating the license balance, the number of assigned users and the number of users of the assigned groups are used.
- **Processors:** The calculation uses the number of processors of the systems on which the software was found. In addition, you can define in the wizard step [System Assignment](#) on which devices the software should be installed.
- **Processor Cores:** The calculation uses the number of processor cores of the systems on which the software was found. In addition, you can define in the wizard step [System Assignment](#) on which devices the software should be installed.
- **Devices and Users:** Assign Devices and Users License to create licenses for devices and users. Device licenses are used to calculate the license balance, the user licenses are listed additionally.

The following metrics are standard in Docusnap:

- **Standard License:** The standard license is used to count the systems on which the software was found for the license balance. No devices or users can be assigned.
- **Device License:** In the case of the Device License, the systems on which the software was found are counted for the license balance. Devices can be assigned in the wizard. If the device license is selected without detection of use, the number of assigned devices is used in the license balance.
- **User License:** The number of assigned users is used to calculate the license balance. The result of the license balance is the same, no matter if it is calculated with and without detection of use. When the detection of use is applied, the tree displays on which devices the software was installed.
- **Processor License:** The calculation uses the number of processors of the systems on which the software was found. If the processor license is selected without detection of use, the number of processors on the assigned devices is used in the license balance.

- **Processor Core License:** The calculation uses the number of processor cores of the systems on which the software was found. If the processor core license is selected without detection of use, the number of processor cores on the assigned devices is used in the license balance.
- **Blocked Software Products:** The blocked software products are products that should not to be installed. This metric is only available with detection of use to find the devices on which the unwanted software was installed.
- **Qualified Devices:** If the license is a Qualified Devices license, this metric can be assigned. When calculating the license balance, the systems on which the software was found are counted. If the Qualified Devices license is selected without detection of use, the number of assigned devices is used in the license balance.
- **Qualified Users:** If the license is a Qualified Users license, this metric can be assigned. The number of assigned users is used in the calculation of the license balance. If groups are assigned for this license you can only decide weather they should be resolved recursively during the calculation or only direct users of the group are to be considered. The license balance is calculated equal with and without use of detection. When the detection of use is applied, the tree displays on which devices the software was installed.
- **Named Users:** If the license is a Named Users license, this metric can be assigned. The number of assigned users is used in the calculation of the license balance. Only users can be assigned to this license. If groups are assigned, you can choose whether the users are to be resolved recursively or only direct users of the group should be added. The license balance is calculated equal with and without detection of use. When the detection of use is applied, the tree displays on which devices the software was installed.
- **Concurrent Users:** If the license is a Concurrent Users license, this metric can be assigned. When calculating the license balance, the number of licenses specified is also used as the number of licenses used, regardless of how many users are assigned, because it is a concurrent user license. The license balance is calculated equal with and without use of detection. When the detection of use is applied, the tree displays on which devices the software was installed.
- **Server:** If the metric Server was assigned, the calculation of the license balance only considers device with the type server. If the Server license is selected detection of use, the number of assigned servers is taken into account in the license balance.

7.3.4 Exclude Systems

In the Exclude Systems step, systems for the current software product can be excluded. As a result, the evaluation can be corrected if a system is not relevant for

this software product. On the contrary, to [Exclude Systems](#) via the ribbon *Licenses*, the system is only ignored for this software product, but is still available for other software products.

License Management

Steps 1-2 3 4 5 Steps 6-11

Software Product **Exclude Systems** Organization

Exclude Systems

<input type="checkbox"/>	NAME	DOMAIN
<input checked="" type="checkbox"/>	asdfg	docusnap.intern
<input type="checkbox"/>	SMBC0001	docusnap.intern
<input type="checkbox"/>	SMDC0003	docusnap.intern
<input type="checkbox"/>	SMEX0003	docusnap.intern
<input type="checkbox"/>	LENA	docusnap.intern
<input type="checkbox"/>	SMDC0001	docusnap.intern
<input type="checkbox"/>	SMDC0002	docusnap.intern
<input type="checkbox"/>	SMDC0004	docusnap.intern
<input type="checkbox"/>	SMFS0002	docusnap.intern
<input type="checkbox"/>	SMII0001	docusnap.intern
<input type="checkbox"/>	SMFS0003	docusnap.intern
<input type="checkbox"/>	SMII0002	docusnap.intern
<input type="checkbox"/>	SMPS0001	docusnap.intern
<input type="checkbox"/>	SMSP0001	docusnap.intern
<input type="checkbox"/>	SMSP0004	docusnap.intern
<input type="checkbox"/>	SMSQ0001	docusnap.intern
<input type="checkbox"/>	SMSQ0003	docusnap.intern
<input type="checkbox"/>	SMSQ0005	docusnap.intern

Back Next Cancel

7.3.5 Upgrade/Downgrade

If the *Upgrade/Downgrade* option is selected in the *Software Product* step, the *Upgrade/Downgrade* step is displayed. Thereby it is possible to map the corresponding update hierarchies in the company. For example, you could specify for the current software product MS Office 2010 that it is an upgrade from MS Office 2007 and a downgrade from MS Office 2013. If multiple downgrade versions of a particular software product exist, you can easily select the ones relevant to your company. A product will only be used if you enable its checkbox in the respective line. A product that has already been selected as upgrade version cannot be selected as a downgrade version, and vice versa. Of course, only products already existing in the database are available for selection. If necessary, you will have to change these details again, for example, if an upgrade version has not been registered in Docusnap yet and will be added later.

If a software product selected as an upgrade or downgrade, the current product is not automatically added as a downgrade or upgrade, but must be added manually for the respective product.

License Management

Steps 1-3 4 **5** 6 Steps 7-13

Exclude Systems **Upgrade/Downgrade** Organization

Select Upgrade

Product Name	Publisher	Version
<input type="checkbox"/> Adobe Reader XI (11.0.10) - Deut...	Adobe Systems Incorpo...	11.0.10
<input type="checkbox"/> Microsoft Office 2007		
<input checked="" type="checkbox"/> Microsoft Office 2013		
<input type="checkbox"/> Microsoft Office Professional Plu...	Microsoft Corporation	14.0.4763.10...
<input type="checkbox"/> Microsoft Office Professional Plu...	Microsoft Corporation	14.x
<input type="checkbox"/> Microsoft Office Project Professi...	Microsoft Corporation	12.x
<input type="checkbox"/> Microsoft Office Visio Profession...	Microsoft Corporation	12.x
<input type="checkbox"/> Microsoft SQL Server 2005	Microsoft Corporation	
<input type="checkbox"/> Microsoft SQL Server 2008	Microsoft Corporation	

Select Downgrade

Product Name	Publisher	Version
<input type="checkbox"/> Adobe Reader XI (11.0.10) - Deut...	Adobe Systems Incorpo...	11.0.10
<input checked="" type="checkbox"/> Microsoft Office 2007		
<input type="checkbox"/> Microsoft Office 2013		
<input type="checkbox"/> Microsoft Office Professional Plu...	Microsoft Corporation	14.0.4763.10...
<input type="checkbox"/> Microsoft Office Professional Plu...	Microsoft Corporation	14.x
<input type="checkbox"/> Microsoft Office Project Professi...	Microsoft Corporation	12.x
<input type="checkbox"/> Microsoft Office Visio Profession...	Microsoft Corporation	12.x
<input type="checkbox"/> Microsoft SQL Server 2005	Microsoft Corporation	
<input type="checkbox"/> Microsoft SQL Server 2008	Microsoft Corporation	

Back **Next** Cancel

7.3.6 Organization

The next step of the *License Management* wizard allows you to enter additional information about the current licensing. These entries will be displayed in reports. Thus, for example, the persons or groups responsible for the software as well as the operation area and the language setting for the software can be entered here.

All entries on this wizard page are optional. If this information is not required, you can leave the fields empty. The data on this page is used for display only and does not affect the way Docusnap determines the license balance.

License Management

...

5

6

7

...

Steps 1-4

Upgrade/Downgrade

Organization

Product Recognition

Steps 8-12

Responsible for Operation

Technical: Thomas Shaw

Legal: Justus McDowell

Owner of the Software

Technical: Technical Support

Legal: Company

User of the Software

Technical: Sandra Smith

Legal: Sandra Smith

Additional Operating Site Information

City: London

Country: United Kingdom

Operation Area:

Language: English U.K.

Back

Next

Cancel

7.3.7 Product Recognition

The Docusnap license management offers several options to determine the number of needed licenses. The number of licenses can be calculated on one hand by defining search words to determine the software products, on the other hand by assigning software products via the software list directly to a license or by using the advanced filter mode.

License Management

Steps 1-5 Organization **Product Recognition** Licenses Steps 9-12

Limit to

☐ Windows Server
☐ Windows Workstation
☐ Linux Systems
☐ Mac Systems

Select Filter Mode

Keywords
Definition of keywords to identify relevant installations on the inventoried devices.

Software List
Software products, based on the software list, are assigned directly to a licensing.

Expert Filter Mode
Definition of keywords in greater detail. Conditions can be grouped and linked with **And** or **Or**.

For the license evaluation the properties of the associated software products are used.

Back Next Cancel

Keywords

For the license evaluation keywords can be defined in order to determine respective installations on the inventoried systems. The almost unlimited combination of keywords lets you adjust the keywords individually to each and every situation.

Click the *Keywords* button to open the *Define Filter* dialog.

Generally, you need to distinguish inclusive and exclusive keywords. Inclusive keywords identify all installations that contain the specified keyword, whereas exclusive keywords identify all installations without the specified keyword. Each keyword, regardless of whether inclusive or exclusive, represents a trifold combination consisting of product name, publisher and version. These three components are additively combined for each keyword type, which means that only if all three individual components match for an installation, the entire keyword will return a positive result. You can combine any desired keywords to identify the corresponding installations as precisely as possible, using both inclusive and exclusive keywords to further narrow down a first interim result. Please note that, when using multiple inclusive keywords, every installation that matches any one of these keywords will be returned and, when using multiple exclusive keywords, all installations will be excluded that match any one of those keywords. If you combine inclusive keywords with exclusive keywords, the specified inclusive keywords will only be applied to that set of installations which still remain after applying the exclusive keywords to the entire set of data available.

Click the *New* button to specify a new keyword. If you uncheck the checkbox next to one of the three keyword components, that component accepts any character string. This is indicated by a "%" in the respective field.

As with other Docusnap items, you can edit existing keywords. To do so, select the desired keyword, edit it and then click the *Save* button once editing is finished. To remove a keyword, select it and click *Delete*. A list of all inventoried software installations is displayed at the bottom of the wizard page to help you with selection. By selecting an entry the name, the manufacturer, and version are entered into the text boxes, and must not be entered manually.

By clicking the *Preview* button, all systems, on which a software has been installed, that corresponds to these search words, are listed.


After the keywords have been defined, the dialog is closed by clicking on the *Finish* button and the filter is stored.

Software List

When the *License Management* wizard is opened via the *Software Product Licensing* dialog, the respective software product is already assigned.

Clicking the *Software List* button opens the *Define Filter* dialog.

In the left list, the software products are listed which can be assigned to the licensing. In the *Search* field the name of the software product is specified by

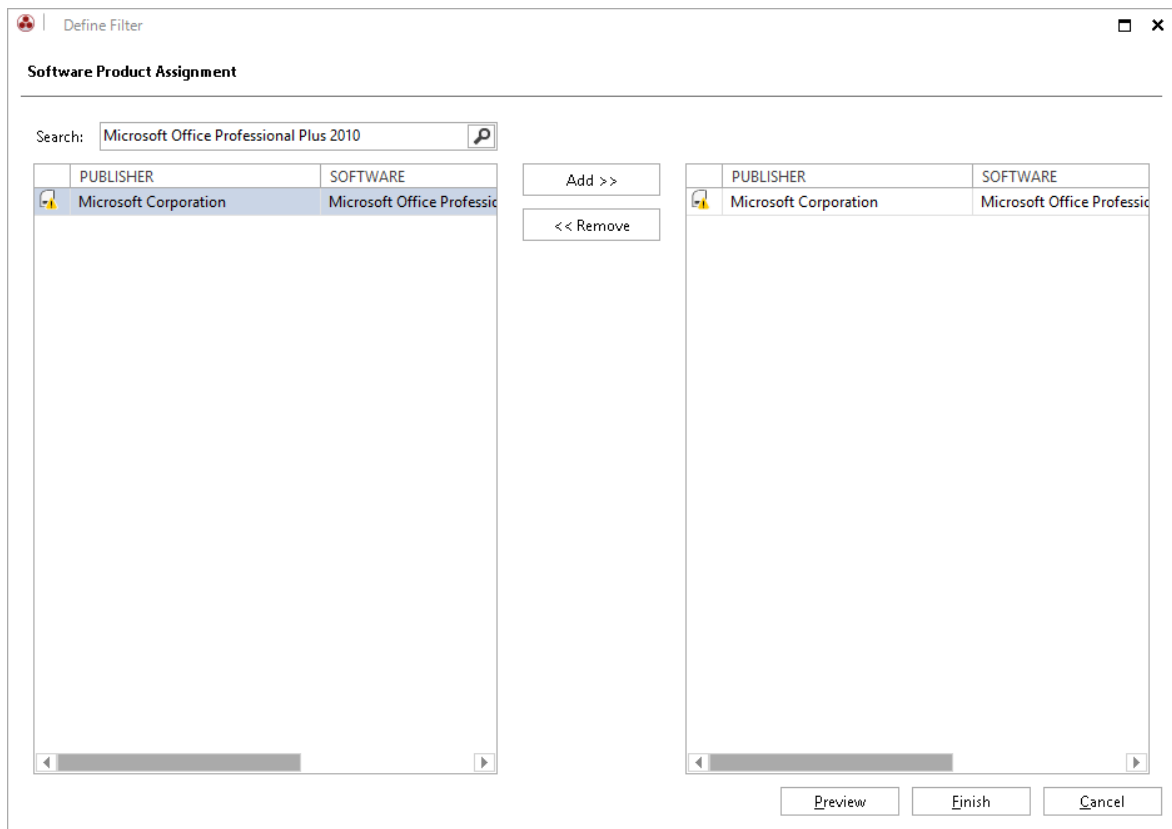
default, and all versions of this software product can be assigned. The search can be adapted and software name, software manufacturers and software version can be searched. To list all software products clear the *Search* field and click the  button.

By clicking on the *Add* button all selected software products are assigned to the current licensing. To delete assignments select the software products in the right list and click the *Remove* button.

In the license evaluation the number of needed licenses will be determined by counting on how many systems the associated software product has been installed.

By clicking the *Preview* button, all systems, on which the assigned software has been installed, are listed.



After the assignment has been defined, the dialog is closed by clicking on the *Finish* button and the filter is stored.



Expert Filter Mode

When switching to the expert mode it is possible to define the keywords in even greater detail. Especially because in the expert mode conditions can be grouped and linked with *And* or *Or*.

Clicking the *Expert Filter Mode* button opens the *Define Filter* dialog.

Select in the column *Field* if the specified value has to match the product name, the name of the publisher or the version of the software product. Click the button  to add another row. Click the button  to delete the current row.

▪ Operator





In the column *Operator* you can choose between *Contains*, *Contains not*, *=* and *<>*. It is possible to use wildcards to specify the keywords more precisely.

- *Contains*: The specified value must be contained in the *Software Name*, *Publisher* or *Version*.
- *Not Contains*: The specified value must not be contained in the *Software Name*, *Publisher* or *Version*.
- *=*: The value has to match the *Software Name*, *Publisher* or *Version* exactly.
- *<>*: The value must not match to the *Software Name*, *Publisher* or *Version*.

▪ And/Or

Once several keywords are specified, select in the *And/Or* column whether the conditions should be linked with *And* or *Or*. If the terms are linked with *And*, then all conditions have to apply to the *Software Name*, *Publisher* or *Version*. If the conditions are linked with *Or*, only one of the terms has to match the *Software Name*, *Publisher* or *Version*.

▪ Grouping

Use grouping to nest the conditions as needed. For example two terms can be linked with *Or* and then be extended with *And* to include another condition. Click the checkbox to select the conditions, afterward click the  button to group the selected entries to one condition. Only conditions listed one below the other can be grouped. The button  marks the start of the group. Click the  button to revoke the grouping. It is possible to organize the grouping in several levels. Select more than one group and click on the  button to group them into one condition.

Product name and publisher and/or versions, which are listed directly under each other and are linked with *And* will be regarded as one combination. These components are additively combined, which means that only if all the individual components match for an installation, the entire keyword will return a positive result. The next specified product name is considered as a new combination.

▪ Example

In the expert mode you can define that additionally to the Office Product either Windows 7 or Windows 8 has to be installed, to be taken into account in this software product. Also no VMware tools are allowed to be installed, since they

indicate that a system is part of a virtual environment. This scenario can be defined as follows.

AND/OR	FIELD	OPERATOR	VALUE
	Product Name	Contains	office
And	Product Name	Contains	windows 7
Or	Product Name	Contains	windows 8
And	Product Name	Not Contain	vmware tools

NAME	OPERATING SYSTEM	PLATFORM	PROCESSOR N...	COUNT	CORES
DSWS01	Microsoft Windows 8.1 Enterprise	GenuineIntel	Intel(R) Xeon(R)...	2	2

■ Preview

Click *Preview* button to apply the search words and display the installed software the conditions match.

After the filter has been defined, the dialog is closed by clicking on the *Finish* button and the filter is stored.

Use of Wildcards

In addition to entering exact keyword strings, you can use wildcards as placeholders for other characters to make your keyword entries even more flexible. The table below briefly shows the available wildcards, which characters they can replace and how the wildcards are applied.

Wildcard	Meaning and application	Example
% or *	Any sequence of zero or more characters. Application: %	%Docusnap% --> returns all entries that contain the word "Docusnap" in any position.

Wildcard	Meaning and application	Example
<code>_</code> (underscore)	Replaces any single character. Application: <code>_</code>	<code>_ocusnap</code> --> returns all entries that end with "ocusnap" and are preceded by any single character.
<code>[]</code>	Any one character contained in a given range of characters. Application: <code>[a]</code> or <code>[abcdef]</code> or <code>[a-f]</code>	<code>Do[ck]usnap</code> --> returns all entries containing the word "Docusnap" or "Dokusnap".
<code>[^]</code>	Any one character not contained in a given range Application: <code>[^a]</code> or <code>[^abcdef]</code> or <code>[^a-f]</code>	<code>Dousna[^b]</code> --> returns all entries that begin with "Docusna" and end with any character except "b".

The wildcards presented in the table above may be embedded into keywords as desired. Thus, for example, four sequential underscores, `"_"`, followed by the string `"snap"`, (`"____snap"`) would return any character string that contains any four characters preceding `"snap"`. The combination `"[d][^ab]%"` means that the first character of the name of the installation must be a `"d"`, followed by any character that is not an `"a"` or `"b"`, followed by any combination of characters. Consequently, `"Docusnap"`, would be found by this keyword. Keywords are not case-sensitive. Keywords are especially helpful when looking for all releases of a particular software: the keyword `"5.%"`, for example, would find all minor versions of a major version 5. To achieve an optimum result, the keywords should be as exact as possible and as generic as necessary. Thus, excessive usage of `"%"` may identify many 'wrong' installations that subsequently have to be excluded by exclusive keywords. In contrast, using keywords without any wildcards probably requires you to define a very long list of keywords in order to cover all potential installations. Please note that both the number of keywords and their complexity may affect the duration of the evaluation, the number of keywords usually having a greater influence, especially if you are scanning a very large network environment.

7.3.8 Licenses

You can assign multiple licenses to each [software product](#) registered in Docusnap. These licenses represent the real-life software licenses actually purchased or the corresponding license agreements. When performing an [evaluation](#), Docusnap uses the total number of registered licenses to determine the inventory of licenses purchased for a particular product and to compare it with the number of installations actually found. This results in the balance of the licenses which shows an over- or under-licensing status which might exist. In this step, you can completely disable the use of licenses for the current software product by unchecking the checkbox at the top of the window. This means, of course, that Docusnap will stop counting the expected licenses for this product.

Specify a unique name for each license registered for this software product in order to be able to identify the entry later. Additionally, select the license type for the current software product, enter the number of licenses purchased and their expiration date. By selecting the corresponding options, you can specify that the current software product is unlimited with respect to the number of licenses and/or their validity period. At the bottom of the wizard window, you can specify whether the license includes a maintenance contract and, if any, and enter its expiration date. Licenses that have expired will no longer be taken into account in the License Management evaluations, however, this is not true for systems assigned to these licenses.

Using the Docusnap Management to edit or delete existing license types and software maintenance types or add new ones. The license types and software maintenance types are for information only and do not affect the behavior of Docusnap when determining the corresponding license balance.

Licenses that have already been entered for the current software product will be displayed in the table at the top of the wizard. The area at the bottom can be used to edit or delete existing licenses or to add new licenses for the current software product.

License Management

Steps 1-6 Product Recognition **8 Licenses** License Usage Steps 10-12

☒ Register Licenses for Current Software Product

Name:

License Type:

☒ Limit Purchased Licenses to

☐ License is Valid until

Maintenance:

☒ Maintenance is Valid until:

NAME	LICENSE TYPE	PURCHASED	VA
SQL Server 2012 3 Pack	Volume license	3	Ur
SQL Server 2012 2 Pack	Package license upgra...	2	Ur

☒ Valid licenses are defined.

7.3.9 System Assignment

If, in the [second step](#) of the License Management wizard, you selected a metric which allows you to assign licenses to systems, this wizard page will display all identified systems, grouped by domains and subdomains. If in addition, also sites were selected, only systems from these sites are listed. Please note that the list will only show systems where an operating system is installed that has been selected in the *Options - License Management* dialog. If in the second step, a metric without detection of use was chosen, which allows the allocation of equipment, the existing IT assets are also made available and can be assigned.

All previously entered licenses for the current software product as well as any systems or IT assets that might have been assigned already will be displayed in the list on the right side of the wizard page. Within the context of a software product, systems are always assigned on the license level. Thus, a specific system can only be assigned to a specific license.

To assign a system to a particular license, select the corresponding system in the list on the left and the corresponding license in the list on the right. Click the *Add >>* button to assign the system to the license. To undo an existing assignment, simply select the desired system in the list on the right and then click the *<< Remove* button. You do not have to select the domain the system belongs, since it will automatically be placed in its correct position. In both cases (adding and removing), you can select multiple systems at a time. To do so, simply hold down the Ctrl key

while clicking individual systems with the mouse, or hold down the Shift key to select a contiguous group of systems. Please note that it is not possible to select systems across domain or license boundaries.

The assignment of the IT assets is performed in the same manner. Given that IT assets are not inventoried, but are entered manually, no automatic assignment via the inventoried software can be carried out. Therefore, IT assets can only be assigned to manual licenses. In this case the number of assigned devices and IT assets is used to calculate the number of needed licenses.

Theoretically, you can also assign licenses to systems which could not be scanned by the inventory process. However, these systems cannot be considered in an evaluation before you have not performed a new, successful inventory scan. If the systems could not be found during the inventory process due to given circumstances, but might be successfully scanned in the future, it might make sense to assign them anyway. All evaluations in the License Management module update automatically to reflect the new data.

Depending on the use case and the metric you selected, assigning systems to licenses might mean a different thing. In the classic application case, systems where the respective license agreements was accepted are assigned to the individual licenses. This implies that the relevant software product has been installed on these systems and can be found there. The evaluation will consider the number of systems if a category with system assignment, the number of processors if a category with processor assignment, and the number of processor cores if a category with processor assignment was chosen. For metrics which do not involve automatic determination of the inventory, system assignment may have a different consequence from that described above: In this case, the assigned systems are considered as the identified actual inventory. This procedure replaces the automated determination of installations in cases where it is not possible, such as in a Terminal Server environment.

Theoretically, you can disable systems assignments by clearing the checkbox at the top of the wizard page. However, this approach is not recommended if you add a software product to a category which involves automated inventory determination, since this would considerably limit the available evaluation options.

License Management

Steps 1-7 8 **9** 10 Steps 11-13

Steps: Licenses **System Assignment** License Usage Steps 11-13

☒ Assign systems to licenses

Filter expression for unassigned systems.

Unassigned Systems

cnypenvrout	
cifs	
CLJ4730OG	
CLJM775EG	
CLJM775EG	
DSDC01	
DSEX01	
dsra	
DSSP01	
DSSP02	
Firewall01	
h1947848	
ipkvm	
nknc2004	
NKNGPRO	
NPI5B2BAE	
NPIF3D6CF	
Print Server dlink-0820C8	

<< Remove

Filter expression for assigned systems.

Assigned Systems

SQL Server 2012 2 Pack	
CLJ4730EG	
DSFS02 (found)	
DSWS01 (found)	
SQL Server 2012 3 Pack	
DSBK01 (found)	
DSFS01 (found)	

☒ There are valid assignments.

Import Computer List

In Docusnap, you can use the [DocusnapTSInfo](#) application to create a log of all systems which log on to a Terminal Server. Based on the information retrieved, these systems can be assigned to the licenses. This requires, however, that the systems have previously been inventoried by Docusnap.

To import the computer list, first select the path where the XML files are located. Then, select the license. This finally enables the *Import Computer List* button. Click the *Import Computer List* button to search the specified folder for the XML files. All systems listed will be assigned to the selected license.

If necessary, you can assign more systems later or undo the assignment of previously assigned systems.

License Management

Steps 1-7 Licenses **System Assignment** License Usage Steps 11-13

☒ Assign systems to licenses

C:\Docusnap\TSinfo Import Computer List

Filter expression for unassigned systems. Add >> Filter expression for assigned systems.

Unassigned Systems

chypervrb01
cifs
CLJ4730EG
CLJ4730OG
CLJM775EG
CLJM775EG
DSDC01
DSEX01
dsra
DSSP01
DSSP02
Firewall01
h1947848
ipkvm
nknc2004
NKNGPRO
NPI5B2BAE
NPIF3D6CF

<< Remove

Assigned Systems

SQL Server OEM
DSBK01 (found)
DSFS01 (found)
DSFS02 (found)
DSWS01 (found)

There are valid assignments. Back Next Cancel

7.3.10 User Assignment

If, in the [second step](#) of the License Management wizard, you selected a metric which allows you to manually assign licenses to users, this wizard page will display all Active Directory users and Active Directory groups. You can assign either users or groups. When assigning groups, you have the option to either assign the group itself or all users who have been assigned as members of this group during the most recent inventory scan. Once you have assigned the group, the number of licenses required for this group will be calculated based on the current inventory. For groups, you can choose whether only the users who are direct members of the group are considered, or whether users of recursive subgroups of the selected group are to be included. For this reason, the number of required licenses may change with each new inventory scan if other users have been assigned to the group in the meantime.

Assigning users to licenses is similar to [assigning systems to licenses](#).

System and user assignments are mutually exclusive, i.e. a license may only be assigned either to a system or to a user, but never to both at the same time. However, if a specific use case requires this combination, you can work around this issue by creating two separate software products in Docusnap.



License Management

Steps 1-7 Licensess **User Assignment** License Usage Steps 11-13

☒ Assign users to existing licenses

Filter expression for unassigned users.

dsra.local

- a.cole
- a.dunn
- a.freeman
- a.gregory
- a.howarth
- Access Control Assistance Operators
- Account Operators
- Accounting
- Accounting_D
- Accounting_G
- Accounting_LO_D
- Accounting_LO_G
- Accounting_MU_D
- Accounting_MU_G
- Accounting_NY_D
- Accounting_NY_G
- Accounting U

SQL Server 2012 OEM

- a.davison
- a.faber
- a.schofield
- Anna
- h.lawrence

There are valid assignments.

Import User List

In Docusnap, you can use the [DocusnapTSInfo](#) application to create a log of all users who log on to a Terminal Server. Based on the information retrieved, these users can be assigned to the licenses. This requires, however, that the users have been inventoried by Docusnap previously.

To import the user list, first select the path where the XML files are located. Then, select the license. This finally enables the *Import User List* button. Click the *Import User List* button to search the specified folder for the XML files. All users listed will be assigned to the selected license.

If necessary, you can assign more users later or undo the assignment of previously assigned users.

License Management

Steps 1-7 8 Licenses **9 User Assignment** 10 License Usage Steps 11-13

☒ Assign users to existing licenses

C:\Docusnap\TsInfo Import User List

Filter expression for unassigned users. Add >> Filter expression for assigned users.

dsra.local

- a.cole
- a.dunn
- a.freeman
- a.gregory
- a.howarth
- Access Control Assistance Operators
- Account Operators
- Accounting
- Accounting_D
- Accounting_G
- Accounting_LO_D
- Accounting_LO_G
- Accounting_MU_D
- Accounting_MU_G
- Accounting_NY_D
- Accounting_NY_G
- Accounting U

<< Remove

SQL Server 2012 OEM

- a.davison
- a.faber
- a.schofield
- Anna
- h.lawrence

There are valid assignments. Back Next Cancel

7.3.11 License Usage

In this step, you can take corrective action with respect to the automatic determination of the existing installations and the associated evaluations in the context of License Management. At the top of the wizard page, a list will be displayed which contains the current inventory. It shows all systems where a software installation was found which matches the previously entered definitions. If the *Use exclusive assignment* checkbox is enabled, the list only includes those systems which were actually assigned to the current software product in the [System Assignment](#) step. This is an alternative way to assign licenses to systems. This procedure is not available for [user assignment](#). This exclusive assignment will not be reflected in the way how the [software products](#) are displayed in the license tree view. It will, however, be taken into account in the [evaluations](#) and reports.

The number of licenses in use in the company, as determined by the automatic software inventory mentioned above, will be displayed in the *In use (assigned automatically)* field. The difference between this number and the number of available, registered, purchased licenses will be shown in the *License Balance*. By entering a corresponding correction value in the *Correction Value* field, you can adjust the license balance manually. This procedure is always necessary if the automatic assignment was not possible for whatever reasons. The correction value may be either a positive or negative number. A positive correction value means that additional installations will have to be added to the installations found, i.e. additional licenses are required. In contrast, a negative correction value means that

more licenses were found to be in use than are in reality. In this case, you can adjust the automatic inventory to the lower value. A correction value of zero means that the evaluation will only be based on the result from the automatic inventory. Manual correction values are kept beyond the expiration date of the registered licenses.

License Management

...

9

10

11

...

Steps 1-8

System Assignment

License Usage

Summary

Steps 12-13

Current Inventory

☐ Use Exclusive Assignment - calculation of the actual license assets only considers assigned systems

	NAME	OPERATING SYSTEM	PLATFORM	PROCESSOR N...	COUNT	CORES	
	DSBK01	Microsoft Windows Server 2012 R...					
	DSFS01	Microsoft Windows Server 2008 R...					
	DSFS02	Microsoft Windows Server 2012 R...					
	DSWS01	Microsoft Windows 8.1 Enterprise					

Correction Value and Notes

Devices

Available Licenses:

In use (assigned automatically):

IT Assets (assigned manually):

Correction Value (manual):

Total:

Notes:

Back

Next

Cancel

7.3.12 Summary

The last step of the License Management wizard presents a summary of all settings specified previously. The changes are only applied to the database when you click the *Save* button. If you click the *Cancel* button here, all changes made, including any [software groups](#) you might have created, will be discarded.

License Management

Steps 1-9 License Usage **Summary** Contracts Comments

Summary

Summary	
Company	
Attribute	Value
Company Name	Docusnap AG
Metrik	
Attribute	Value
Name	Device license
Calculation Basis	Hosts
without Detection of Use	No
Group	
Attribute	Value
Group Name	Microsoft SQL
Software Product	
Attribute	Value
Product Name	Microsoft SQL Server 2012
Publisher	Microsoft Corporation
Version	
Undesired	No
Correction Value	0
Technical Responsible	Thomas Shaw
Legal Responsible	Justus McDowell
Technical Owner	Technical Support

Click "Save" to save the software product.

Back Save Cancel

7.3.13 Contracts and Comments

For a created licensing the additional information contracts and comments can be added through the wizard.

Contracts are assigned to the created licenses. If comments are created, they are assigned to the software product.

Click the *New* button to open the dialog for creating the additional Information. After the contract or the comment has been saved, you can switch to the *Attachments* tab to attach documents. Subsequently, the dialog is closed by clicking the *Close* button.

To edit an existing SQL Server contract or comment, select the contract or comment and click on the *Edit Contract* or *Edit Comment* button to open the dialog for editing.

The created contracts and comments are displayed in the *Additional Information* tab of the respective licensing in the tree view and can be edited. In addition, the contracts and comments are displayed in the tree under the respective heading.

By clicking on the *Finish* button the *License Management* wizard closes.

License Management

Steps 1-9 License Usage Summary Contracts **Comments**

Add Comments

+ New Edit Comment Delete Comment

	TITLE	COMMENT TYPE	DESCRIPTION	DA
	Microsoft Office 2010	Invoice		16.

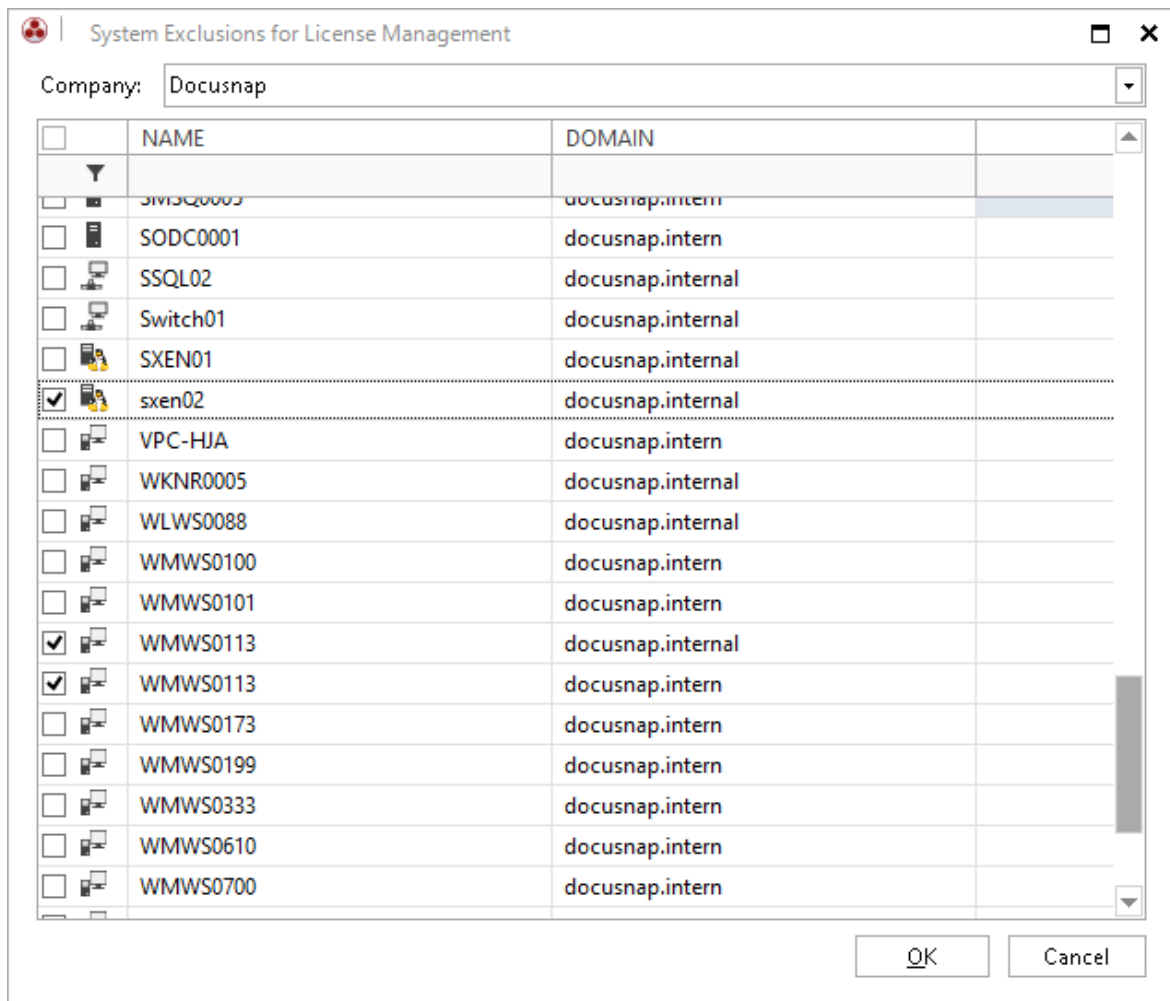
Back Finish Cancel

7.4 System Exclusions

Systems, and the software installed on them, may be excluded from license management either by means of the *Exclude Systems* button or the *Exclude from License Management* checkbox in the [editor](#) window. Clicking the *Exclude Systems* button opens a dialog where you can edit the exclusion list.


After you have selected the corresponding company, all systems associated with this company and running an operating system which is taken into account in License Management will appear in the list below it. By enabling the checkbox next to a particular system, you can exclude it from License Management. Accordingly, systems without a checkmark will be included in the License Management process. You can quickly and easily undo a previous system exclusion by clearing the corresponding checkbox again.

Excluding certain systems from license management may be useful, for example, if a system is operated as a test environment for which no actual license is required. If a company has a great number of inventoried systems, it might be a good idea to use the filter options next to the list to filter the systems, for example, by domain and thus facilitate their selection.



7.5 Export Definitions

You can export all static data related to the registered [software products](#) to an external file, so that these settings need not be re-entered from scratch, for example, when switching between databases. Click the *Export* button in the *Licenses* ribbon to open a dialog where you can save the data on registered software products to an external file.

You can specify the file to which you want to export the corresponding data in a field at the top of the dialog. Clicking the  button will open a file/path selection dialog. The table in the *Export Definitions* dialog shows a list of all products registered for all companies in this database. Please note that only software products whose checkbox is enabled will be exported.

If software products are exported to which software entries have been assigned via the software list, these software entries are also exported. If the entries already exist in the database into which the license definition is imported, the entries are updated.

In the software licensing dialog, software entries can also be marked as not relevant or undesired. If the *Not Relevant Software Products* and *Undesired Software Products* check boxes are activated, these software entries are also exported to the license definition. Thereby, the corresponding entries in the database, into which the license definition is imported, will be updated and also defined as not relevant or undesired. If an entry does not exist yet, a new entry is created so that if this software is included in a future inventory, it is already defined as undesired or not relevant. When importing, you can select whether the not relevant or undesired software entries are to be imported.

The *Additional Information* check box allows you to define whether additional information that has been created for the selected software products should also be exported to the license definition.

Click the *Export* button to export all selected software products to the specified file.

License Management - Export Definitions

File Name: C:\Docusnap\LicenseDefinition.dlu


Export Range: ☐ Not Relevant Software Products ☐ Undesired Software Products ☐ Additional Information

	COMPANY	GROUP	NAME	PUBLISHER	VERSION	UND
<input checked="" type="checkbox"/>	Docusnap AG	Microsoft OS	Microsoft Windows Server 2012 R2 Standard	Microsoft Corporation	6.3.%	No
<input checked="" type="checkbox"/>	Docusnap AG	Microsoft OS	Microsoft Windows 8.1 Enterprise	Microsoft Corporation	6.3.9%	No
<input checked="" type="checkbox"/>	Docusnap AG	Microsoft SQL	Microsoft SQL Server 2012	Microsoft Corporation	11	No
<input checked="" type="checkbox"/>	Docusnap AG	Microsoft SQL	Microsoft SQL Server 2014	Microsoft Corporation	12.0.2000.8	No
<input checked="" type="checkbox"/>	Docusnap AG	Microsoft SQL	Microsoft SQL Server 2008	Microsoft Corporation	10	No
<input checked="" type="checkbox"/>	Docusnap AG	Microsoft SQL	Microsoft SQL Server 2012	Microsoft Corporation		No

Export Close

7.6 Import Definitions

You can import previously [exported license definitions](#) to another database. To do so, click *Import* button in the *Licenses* ribbon. A dialog for configuring this import process opens.

After clicking the  button next to the field at the top of the dialog, you can select a previously exported definition file. It is also possible to import data from earlier

Docusnap versions into a current Docusnap database. For this purpose, you need to set the correct file type in the file selection dialog: *Docusnap 5.x/6.x License Definition (*.dlu)* or *Docusnap 4.x License Definition (*.xml)*.

Select a target company where the corresponding data will be inserted during the import process. To determine if a given software product to be imported already exists for the target company, the name, the vendor and the version of the respective software product will be compared. If the name, vendor and version of the software product match and the checkbox next to the product to be imported is checked, all values related to the current software product will be overwritten in the target company.

When you import Docusnap 4 software products that have not been assigned to any group, Docusnap will create a new group with the name *Import 4.x* and the current date. Corresponding names (e.g. *Import 4.x - No.1*) will be generated in other cases too, such as naming the individual licenses. This is necessary in order to make a fully automated import process possible without requiring user interaction. You can adjust these automatically created names as desired once the import process is complete.

The checkboxes in the *Import Range* group allow you to select which data will be imported from the import file into the database. Since some of the options are linked, disabling some checkboxes may cause another checkbox to be disabled as well. In addition, there are differences between data imported from the Docusnap version 4 and 5/6 file types. Therefore, not all options are available when you import a Docusnap 4 file.

License Management

License Management - Import Definitions

File Name: C:\Docusnap\LicenseDefinition.dlu

Target Company: Docusnap AG

Import Range:

- ☒ Product Info
- ☒ Notes on the Software Products
- ☒ Update Path
- ☒ Licenses
- ☒ Additional Information
- ☐ Not Relevant Software Products
- ☐ Product Recognition
- ☐ Undesired Software Products

<input checked="" type="checkbox"/>	GROUP	NAME	PUBLISHER	VERSION	UNDESIR
<input checked="" type="checkbox"/>	Microsoft OS	Microsoft Windows Server 2012 R2 Standard	Microsoft Corporation	6.3.9%	No
<input checked="" type="checkbox"/>	Microsoft OS	Microsoft Windows 8.1 Enterprise	Microsoft Corporation	6.3.9%	No
<input checked="" type="checkbox"/>	Microsoft SQL	Microsoft SQL Server 2012	Microsoft Corporation	11	No
<input checked="" type="checkbox"/>	Microsoft SQL	Microsoft SQL Server 2014	Microsoft Corporation	12.0.2000.8	No
<input checked="" type="checkbox"/>	Microsoft SQL	Microsoft SQL Server 2008	Microsoft Corporation	10	No
<input checked="" type="checkbox"/>	Microsoft SQL	Microsoft SQL Server 2012	Microsoft Corporation		No

Import Close

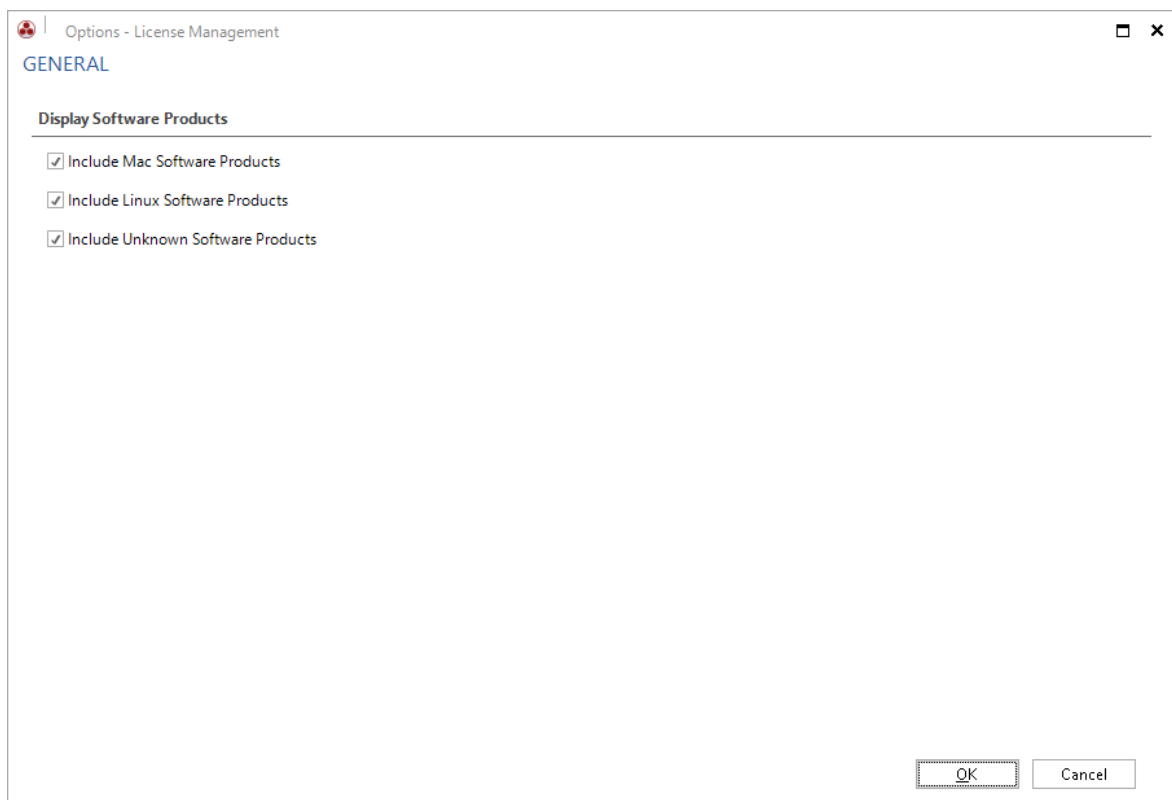


7.7 Options

Settings for the license management can be specified in the *Options - License Management* dialog. Click the *Options* button in the *Licenses* ribbon or the *License Management* button in the Docusnap Menu to open the dialog.

General



Use the *Include Mac Software Products*, *Include Linux Software Products* and *Include Unknown Software Products* checkboxes to specify which software products should be provided for selection in the *Software Product Licensing* dialog.



7.8 Evaluations

To evaluate the results in terms of licensing, many different options, that can be adjusted and extended using the Customizing module, are available in Docusnap. Basically, you have the choice between evaluations available directly from the [tree view](#) in the License Management module and evaluations presented as [reports](#). Please note that the report-type evaluations usually provide more functionality, especially when it comes to determining the licenses currently in use in the company. Most automated evaluations will result from applying the assigned software products or the defined [keywords](#) to the inventoried software dataset and thus are based on the identified systems where the corresponding installations have been found. [Undesired Products](#) refer to a special form of evaluation that will be explained in a separate section.

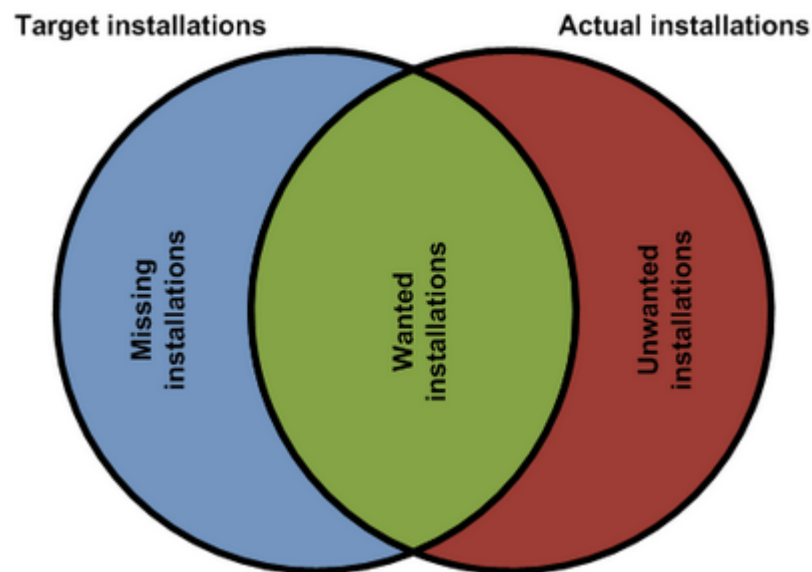
Tree view evaluations

All tree view evaluations described in this section feature a consistent use of icons which enable you to easily differentiate between the various operating systems and system types where the corresponding installation was found. Under the *Found Software* node, you will find the most basic evaluation in the License Management tree view. All software products found on the inventoried systems that were assigned to the licensing or match the corresponding combination of keywords are displayed here. Accordingly, installations of products for which no keywords have been defined or products of categories with no automatic assignment will not be shown under this caption. Found installations are grouped by name, publisher, version and operating system. Each node lists all systems where the corresponding installation was found. The icons displayed in the tree help you to identify whether the corresponding installation is wanted or unwanted, the  icon representing a wanted installation and the  icon an unwanted installation. Whether a certain installation is wanted or unwanted, depends on the assignment of systems to individual product licenses. All installations on systems that have been assigned to a valid license for the corresponding product are considered as wanted installations, all others are considered as unwanted installations.

For a quick overview of the current licensing situation, five additional nodes are available below the *Installations* node in the *License Management* tree. Under the *Expected Installations* node, you can find the systems assigned to all licenses available for the respective software product in a flat list. The *Actual Installations* node features a list of all systems where at least one installation was found which was assigned to the licensing or matches the specified combination of keywords. All systems that have been assigned to a valid license of the current software product and on which at least one installation was actually found by applying the filters are listed under the *Wanted Installations* node. This exactly represents the intersection between the *Actual Installations* and *Expected Installations* categories. Contrary to this, the *Unwanted Installations* node lists all systems to which no valid license for the respective software product has been assigned. The *Missing Installations* node lists those systems where an installation should have been found, but where this was not the case when Docusnap applied the definitions from the product recognition. Ideally, the two categories *Expected Installations* and *Actual Installations* should be identical and exactly the same systems should be found under the *Wanted Installations* node. In a perfect environment, the two categories *Unwanted Installations* and *Missing Installations* would be empty. If any systems are listed under these two nodes, corrective actions are necessary on the network level or with the respective installations.

The figure below graphically illustrates this fact, the circle on the left representing the expected installations and that on the right the actual installations found by the inventory process. The green intersection of the two circles in the figure represents the wanted installations; this results in the missing installations being the

remaining set of the expected installations, depicted in blue, and the unwanted installations being the remaining set of the actual installations, depicted in red. In an ideal environment in terms of licensing, the two circles would be congruent.



The view of the software products is either at the company level, below the *Groups* heading, sorted by the respective groups, or on the site level below the *Sites* heading if the software products were assigned to a site.

The structure below the *Groups* heading lists all the systems on which the found software was installed. Regardless of whether the system belongs to one of the assigned sites.

If a software product has been assigned to a site, this software product is displayed below the respective site. In the sites structure, the systems are filtered so that only systems of this site are displayed when the found software has been installed.

Evaluations in Reports

Reports present evaluations at the product, group, company and site levels.

For these reports, Docusnap calculates the license balance.

Product Details and Product Overview

You can create a *Product Details* report and a *Product Overview* report at every level. These reports contain different types of information about the respective product. At the group or company level, all products associated with the group or the company are shown. Additionally, the licenses that have been created for these products are listed.

This evaluation includes a comparison between the actual and the expected values.

The license balance will be displayed in tabular and graphical forms, based on the licenses, keywords, correction values and upgrades.

Variance Analysis		
Available Licenses	10	← Sum of all valid licenses. If the number of licenses is unlimited the needed amount of licenses is displayed.
In use (assigned automatically)	2	← Number of systems the software is installed on.
Correction Value (manual)	0	
Subtotal	8	
Correction Upgrade / Downgrade Licenses	-5	← Number of licenses used by update or downgrade paths.
Total	3	← Number of missing or surplus licenses.

License Evaluation

All software products associated with the group or company will be displayed in a license evaluation table. A chart with an overview of missing or unnecessary licenses is displayed below the table.

Company: Docusnap AG						
Group: Microsoft						
Product Name	Available	In use (automatical)	Correction Value (manual)	Subtotal	Upgrade/ Downgrade	Total
Microsoft Office Enterprise 2007	3	3	0	0	0	0
Microsoft Office Professional Plus 2010	10	1	0	9	0	9

Sites Evaluation

In the *License Report*, which is located below the respective sites, the data on the software products as well as all the found systems and software of this sit are listed.

The *Sites License Report* at the company level shows the license evaluation for all software products that have been assigned to at least one site.

In order to get a comprehensive account of the software product on the basis of the sites, the report shows for which site licenses are required. Sites assigned to the software product are listed individually and the number of licenses required is displayed. The number of systems on which the software was found that does not belong to one of the assigned sites is also taken into account in the license calculation.

Variance Analysis		
Available Licenses	9	Sum of all valid licenses. If the number of licenses is unlimited the needed amount of licenses is displayed.
Sites: London - In Use (assigned automatically)	5	
Sites: Munich - In Use (assigned automatically)	2	Number of systems on which the software was installed. Calculated for each site.
In Use all Sites	7	
Correction Value (manual)	0	
Correction Upgrade / Downgrade Licenses	0	
Total	2	
In Use in not assigned sites	1	Number of systems on which the software was installed, but which do not belong to any of the assigned sites. Displayed only if this case occurs with this software product.
Total	1	

7.9 Undesired Products

Products that should not be installed on any system in the company are referred to as undesired products in Docusnap. You can define this classification at the respective product level in the License Management wizard by selecting the *Blocked software products* metric. In the tree view, undesired products are identified by a "forbidden" icon (🚫).

The separate *Undesired Products* node at the company level allows you to perform a quick and comprehensive evaluation. Below it, you can find a simple tree structure which displays each affected product and each system where such a product has been found. Aside from this, you can display an aggregate view of all systems found in this category at each level below this node.

7.10 Docusnap TS Info

Docusnap provides the *DocusnapTsInfo.exe* utility to help you identify all systems and users that log on to a terminal server. This makes it easier, in the context of License Management, to assign licenses to systems and users that use the terminal server.

To start the logging process, add the *DocusnapTsInfo.exe* executable file e.g. to the login script for the domain. You can set a particular parameter to define the directory where the XML files will be stored. As a parameter, you need to specify the path to that location:

```
DocusnapTsInfo.exe "\\STBL01\Builds\TsInfo"
```

This folder contains the XML files that hold information on the logged-in users and devices.

The script is located in the *Bin* folder of the installation path.

Part



8 Additional Information



Using additional information, you can add extra information to the objects listed in the Explorer. The additional information can be comments, financial records, passwords, contracts or tasks. The tab for entering and editing additional information will be displayed when you click an object in the Data Explorer or License Management explorer.

8.1 Create Additional Information

Additional information allow you to add some extra information to individual objects in Docusnap. For example, the *Passwords* provide a comfortable way to manage credentials, and the *Contracts* lets you store and manage contractual agreements.

Since Docusnap X it is possible to link an additional information with more than one object.

The following additional information are available in in Docusnap:

[Comments](#)

[Financial Records](#)

[Passwords](#)

[Contracts](#)

Tasks

The additional information can be created, displayed and managed on an additional tab in the main window. For each of these additional information, you can store attachments, such as purchase contracts, SLAs and more.

Attachments

Create Additional Information

As soon as an object has been selected in the Data Explorer, for which additional information can be created, an overview is displayed on the right side and the *Additional Information* tab is displayed.

The screenshot shows the Docusnap X application window. On the left is the 'Data Explorer' tree with 'docusnap.internal' selected. The main area displays the 'Additional Information' tab for the selected object. This tab contains a table of additional information entries and a list of tasks.

TITLE	NAME	TYPE
Workstations		
Servers		
Linux		
Mac		
SNMP Systems		
Thin Clients		
HP-UX		
CIFS		
Virtualization		
IP Systems		
ADS		
Network Services		
Application Servers		
Database Server		
Storage		
Summary		
Reports		
Standard Maps		

NAME	TYPE
Comments	
User Manual	User Manual
Firewall Configuration File	User Manual
Contracts	
Employment Contract FL...	Employment Contract
RO-IT-5675 Leasing Cont...	Leasing Contract
Sales Contract WLWS0088	Sales Contract
Service Level Agreement	Employment Contract
Financial Records	
Mobile Phone	Direct Costs
Workstation	Direct Costs
Portable Navigation Syst...	Direct Costs
Portable Air-Conditioner	Direct Costs
Passwords	
WMXL0001 - Linux	WMXL0001
WMA0001 - Mac	WMA0001
WLAN - Internal Encrypti...	SSID: Wlan_intern
Docusnap Website	www.docusnap.com
Tasks	
Staff Meeting - 1pm	Meeting
Call Mr. Miller	Phone Call
E-Mail Facility Managem...	E-Mail
Proposal to Mr. Jones	E-Mail

If you switch to the *Additional Information* tab then the Organization Ribbon is displayed. In the tab, all additional information of this object is displayed and can be edited. New entries can be created by clicking on the *New Element* button in the short overview or via the respective button on the *Organization* ribbon. This opens the dialog for creating the respective additional information. In this dialog, all relevant data for the additional information is specified and in the tree on the right side you select the object to which the additional information should be linked.



Additional Information

Title:

User Manual

Comment Type:

User Manual

Show in Reports:

Show at the Beginning

Category:

Organization

Description:

B

/

U

abc

Arial

10

User Manual is located in the attachments

New

Edit

Delete

Read File

Check Out

Check In

	TITLE	FILE NAME	PATH	FILE SIZE	USER
	DocuSnap Manual	DocuSnap_User_Manual....		30,66 MB	

Assigned Objects

Inventory

Overview

DocuSnap AG

Infrastructure

docuSnap.intern

dsra.local

Communication

Standard Maps

Reports

Assets

Sites

Organization

License Management

IT Security

Documentation

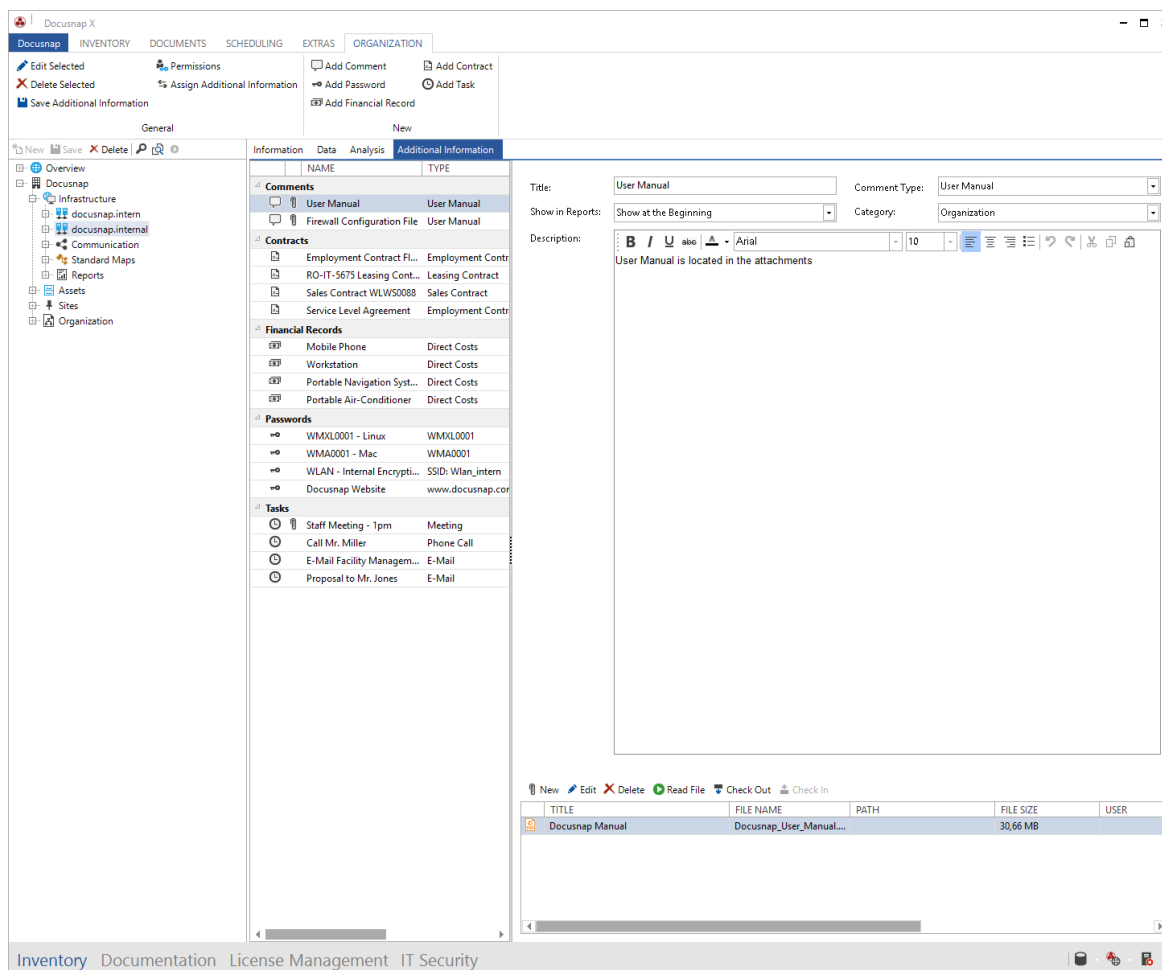
Save

Close

There are several possibilities for editing additional information. If an additional information is selected in the overview, it can be opened in a dialog by clicking on the *Edit* button and changes can be made. Alternatively, an data entry screen is displayed in the *Additional Information* tab for the selected additional information. Changes can be saved using the *Save Additional Information* button in the *Organization* ribbon. The selected additional information can also be opened in a dialog by clicking the *Edit Selected* button. In addition to the content of the additional information, the dialog can also be used to change the object to which the additional information is linked.

Changing Date: 1/21/2020

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8.1.1 Comments

Comments can be used to store additional information about individual objects. You can, for example, store the current configuration file for a firewall (SNMP device). Comments can also be shown on datasheets and in reports.

Click the *New Element* or the *Add Comment* button to add a comment for the selected object. The *Title* and *Comment Type* fields are mandatory and must be filled in. The *Show in Reports* list box allows you to specify for each comment whether it will be shown in reports, and if so, whether it will be displayed at the beginning or at the end of the report. Click the *Save* button to add the comment to the list.

To edit a saved comment, select it. Its comment will be displayed in the data entry screen. There, you can edit the comment. Click the *Save Additional Information* button to apply the changes. To delete a comment, click the *Delete Selected* button.

You can also add attachments to an *Additional Information*. The *Title* field is mandatory. The file name and the size of the selected file will appear in the *File* and *Size* fields. These fields are read-only. The *Description* field is optional.



NAME	TYPE
User Manual	User Manual
Firewall Configuration File	User Manual

Title: Firewall Configuration File
Comment Type: User Manual

Show in Reports: Don't Show
Category: <No Selection>

Description:

B / U Arial
10

User Manual is located in the attachments

New Edit Delete Read File Check Out Check In

TITLE	FILE NAME	PATH	FILE SIZE	USER
User Manual	User Manual.pdf		138 Byte	

8.1.2 Financial Records

The *Financial Records* are used for storing financial data. You can, for example, record and evaluate the costs for the entire life cycle of a server.

Click the *New Element* or the *Add Financial Record* button to create a new finance entry. The *Title* and *Amount* fields are mandatory and thus must be filled in. All list fields, such as *Cost Type*, *Payment*, *Depreciation Method* and *Date of Purchase* show a default value that you can change, if necessary. The *Useful Life (Months)* value defaults to 36 months. If no depreciation is applied or a different useful life is targeted, you can delete or change this value. The *Low-Value Asset* checkbox indicates whether the purchased product represents a *low value asset*. The other fields are optional.

To add the financial data entry to the list, click the *Save Additional Information* button. To edit a saved financial record entry, select it. Its content will be displayed in the data entry screen.

	NAME	TYPE
Financial Records		
Mobile Phone	Direct Costs	
Workstation	Direct Costs	

Title: Workstation
Cost Type: Direct Costs
Useful Life (Months): 36
Amount: 1299,00
Special Depreciation:
Cost Center:
Category: <No Selection>
Description:

Document Number: 556844
Date of Purchase: 16.09.2016
Depreciation Method: Linear
Payment: Daily
☐ Low-Value Asset

New Edit Delete Read File Check Out Check In

TITLE	FILE NAME	PATH	FILE SIZE	USER
-------	-----------	------	-----------	------



8.1.3 Passwords

Passwords can be simply and quickly organized, saved and retrieved using the *Passwords* extension type. Passwords associated with an object in Docusnap will be encrypted and are thus safely stored in the database.



The *Passwords* tab will only be displayed if you created an encryption file for the selected database. The passwords will be stored in encrypted format in the database and can only be read by users who use the same encryption file. If you did not create an encryption file or fail to select it when switching to another database, the Password feature is not accessible. The encryption file can be created during the [Startup Wizard](#) procedure or from the [Options](#) dialog.

You can add a new password for the selected object by clicking the *New Element* or the *Add Password* button. The *Title*, *Password* and *Password Type* fields are mandatory. The remaining fields are optional. To add the new password to the list, click the *Save* button. To edit a saved password, you select it from the list. Its content will be displayed in the data entry screen.

Click the  icon in the *Password* field to displays the password as plain text. Clicking the icon again will replace the passwords by asterisks again. Using the  icon, you can copy the password to the clipboard. If [Password Logging](#) is enabled, Docusnap will keep a log of all users who copied or displayed the password.



8.1.4 Contracts

Docusnap provides the *Contracts* extension type which allows you to store contracts and contractual data for individual objects. This can be, for example, the maintenance agreement for a server. If you entered an expiration date for this maintenance agreement, you can choose to be notified about its expiration.

Click the *New Element* or the *Add Contract* button o add a new contract. The *Title*, *Start Date* and *Contract Type* fields are mandatory and thus must be filled in. The *End Date* field is only needed if the contract has a limited duration.



You can set the Docusnap server to send [notifications](#) when the contract has expired.

To edit a saved contract, select it from the list. Its content will be displayed and can be edited. Click the *Save Additional Information* button to save the changes.

The contracts can be created recursively. In the contract hierarchy, the parent contract can be selected.

$$\Delta \quad \text{*****} \quad \Delta$$

8.1.5 Tasks

The *Tasks* allow you to enter meetings, reviews and other events.

Thanks to the [Notifications](#) feature in Docusnap, you can have the program automatically send an e-mail if the reminder date is the same as the current date or lies ahead. Thus, the overdue reminders are listed in the email attachment.

Click the *New Element* or the *Add Task* button to add a new reminder to the selected object. The *Title*, *Priority* and *Reminder Type* fields are mandatory and thus must be filled in. By clicking the *Save* button, you add the task to the list. To edit a saved task, you must select it from the list. Its content will be displayed on the tab. Edit it and click the *Save Additional Information* button.

Data (5) **Additional Information**

	NAME	TYPE
Tasks		
Staff Meeting - 1pm	Meeting	
Proposal to Mr. Jones	E-Mail	
Call Mr. Miller	Phone Call	

Title: Staff Meeting - 1pm

Reminder Type: Meeting Reminder Date: 19.09.2016

Priority: High Category: <No Selection>

Description:

B / **U** **abc** **Arial** 10

New Edit Delete Read File Check Out Check In


TITLE	FILE NAME	PATH	FILE SIZE	USER
-------	-----------	------	-----------	------

8.1.6 Attachments

To each additional information, you can add attachments. Below the data entry screen all currently assigned attachments are listed.

Adding Attachments

There are two ways to add attachments.

- Click the *New* button to open the dialog *Add Attachment*. When you click the  button, a dialog opens where you can select the desired file. After you have selected the desired file, the *Title* text box will automatically be populated with the file name. Optionally, you can enter a description of this attachment. To save the attachment data (*file*, *title*, *description*) in the database, click the *Save* button.
- You can also use *drag & drop* to add files to the attachments. Simply drag the desired file into the list of attachments and drop it there. If you use *drag & drop* to add a directory or multiple files to the table, all files, or the files in the directory, will be added simultaneously. The attachments added by *drag & drop* will immediately be stored in the database. For each added file, its file name will be used as title. You can change it and then apply your change by clicking the *Save* button.

Opening Attachments

To open an attachment in an application, first select the file. Then click the *Read File* button to open the file with the program that is set as the default program for that file type on your system.

Editing Attachments

Attachments can be edited at any time. To edit the file, you must select it. Then, click the *Check Out* button. The file will be stored in the *check out path*. *Checking out* a file prevents the file from being edited by multiple users at the same time, which would introduce inconsistencies. To make the checked-out file available to other users again, release it by clicking the *Check In* button. *Checking in* the modified file saves it back to the database.

The screenshot shows the 'Additional Information' form in Docusnap. On the left, a 'Comments' sidebar lists 'User Manual' and 'Firewall Configuration File'. The main form has fields for 'Title' (Firewall Configuration File), 'Comment Type' (User Manual), 'Show in Reports' (Don't Show), and 'Category' (<No Selection>). A 'Description' text area contains the text 'User Manual is located in the attachments'. At the bottom, a table lists attachments:

	TITLE	FILE NAME	PATH	FILE SIZE	USER
	User Manual	User Manual.pdf		138 Byte	

Buttons for 'New', 'Edit', 'Delete', 'Read File', 'Check Out', and 'Check In' are located above the table.

8.2 Password Logging

With its *Password Logging* feature, Docusnap allows you to track which user copied which password and /or displayed it in plain text.

Password logging can be enabled and disabled from the *General* page of the *Options* dialog.

The *Password* field on the data entry form on the *Passwords* tab includes two buttons. Each time you click one of these two buttons to copy or display a saved password in plain text, Docusnap logs the respective user including a timestamp of the action.

This allows you to find out who knows a particular password.

The list of users who displayed passwords is shown in the Inventory tree view. The password log for an individual password will be shown below the respective password, the password log for all passwords will be shown at the company level.

You can filter the general password log overview by user to see all passwords viewed by a certain user.

The screenshot shows the Docusnap X application interface. The 'Organization' tab is selected, displaying a tree view on the left and a table of password log entries on the right.

Tree View Structure:

- DocuSnap AG
 - Infrastructure
 - Assets
 - Sites
 - Organization
 - Processes
 - Services
 - Contacts
 - Comments
 - Contracts
 - Financial Records
 - Passwords
 - DocuSnap Password
 - WML0001 - Linux
 - Password Log
 - VPC-JEIAAdministrator
 - VPC-JEIAAdministrator
 - VPC-JEIAAdministrator
 - WMA0001 - Mac
 - WLAN internal
 - Password Log
 - Tasks
 - Reports
 - Overview

Table Data:

USER	USED BUTTON	DATE
VPC-JEIAAdministrator	Show Password	16.09.2016 09:43:10
VPC-JEIAAdministrator	Copy Password	16.09.2016 09:42:11
VPC-JEIAAdministrator	Show Password	16.09.2016 09:42:11

You can set [permissions](#) to limit the right to view the password log to particular users.

8.3 Categories and Permissions

To restrict access to the additional information, you can use categories and permissions. The user roles are assigned to categories in the Docusnap Management.

When you select a category, the additional information will only be displayed if the current user has been assigned a role to which this category is visible.

Access restrictions for additional information also apply to entries below the *Overview* headline in the *Inventory* tree. For this reason, additional information are only displayed to authorized users. If a user has been assigned the *Administrator* role, all additional information is shown. Additional information that should not be displayed due to categorization are flagged as (*hidden*).

Permissions

In addition to assigning a category, you can define the access to additional information by clicking the [Permission](#) button. In the *Object Permissions* dialog, you can specify whether a person to whom this role was assigned may *Read*, *Write*, *Delete* and / or *Insert* the additional information.



Part

IX

9 Physical Infrastructure

The feature Physical Infrastructure covers the physical documentation of your IT infrastructure.

This begins with the visualization of sites, buildings and rooms. Subsequently, devices, racks, switches and all other IT-relevant systems can be assigned. The cabling of the systems can also be included.

Various maps and reports are available for evaluation.

9.1 Definitions

Physical Infrastructure

In Docusnap the following elements are summarized under the physical infrastructure:

- Sites (cities, buildings, floors, rooms)
- Racks, Patch Panels and Network Sockets
- Cabling

Infrastructure – Editor

The Infrastructure Editor provides the interface to create and manage the elements belonging to the physical infrastructure.

Sites

Sites are used in Docusnap to represent the structure of a company. At least one site is required to map the physical infrastructure.

Racks

Racks can be used to document the physical structure of a rack in Docusnap.

Site Elements

Site elements in Docusnap are all elements that can be assigned to a site, e.g. network sockets, air conditioners, etc.

Rack Elements

A rack element is built into a rack. Examples of a rack element are servers, switches or patch panels.

Shapes

A shape is the image of a physical element (e.g. server, switch, network socket) and serves to graphically represent the element in the rack. The detected plugs are also used to document the cabling.

Shape Editor

Integrated editor in Docusnap, with whose help the existing shape collection can be extended by own shapes.

9.2 Infrastructure Editor

The Infrastructure - Editor is the user interface for mapping the physical infrastructure in Docusnap. All tasks dealing with this topic can be done in the editor.

The editor can be used to map site structures, create racks and fill them with elements.

Furthermore, the cabling of the physical components can be carried out and new shapes can be added.

Physical Infrastructure

Docusnap AG

Sites

Icons: +, ✓, ✕, 🗑️, 📄

Sites

Racks

Site Elements

Rack Elements

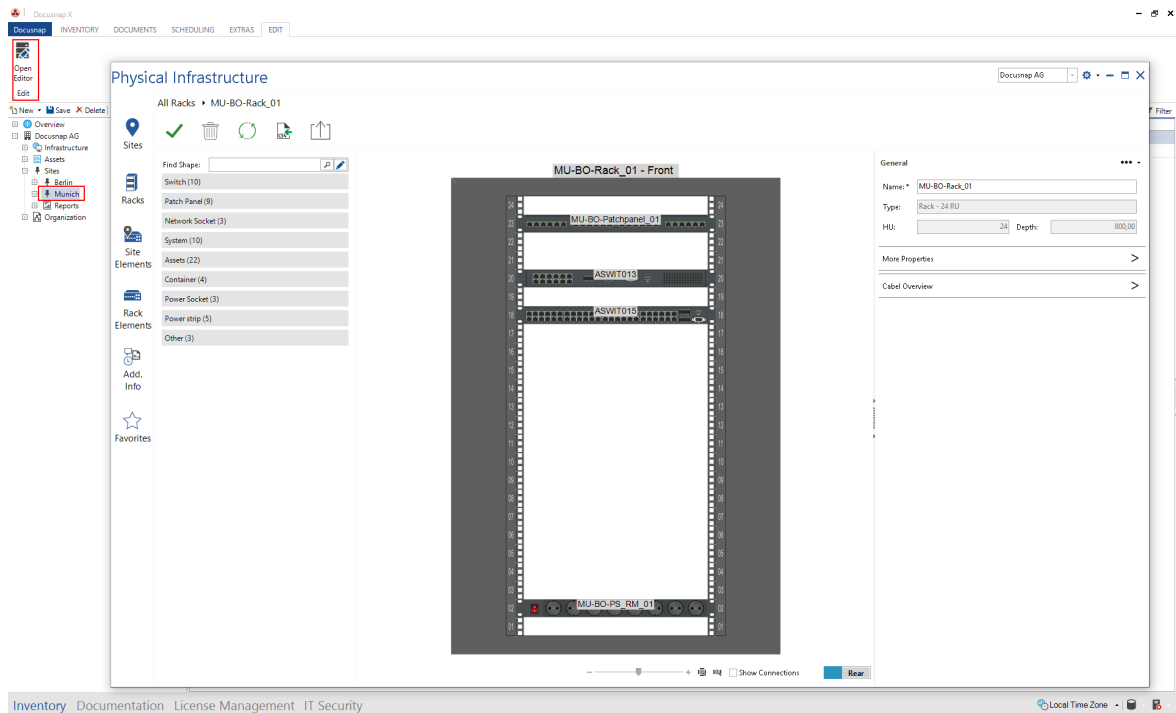
Add. Info

Favorites

NAME	SITE TYPE	ADDITIONAL INFORMATION	CHANGE IMAGE	
Munich	City	<input type="checkbox"/>		...
MU-BranchOffice	Building	<input type="checkbox"/>		...
MU-BO-FL_I	Floor	<input type="checkbox"/>		...
MU-BO-FL-I-01_Sales	Room	<input type="checkbox"/>		...
MU-BO-FL-I-02_Sales	Room	<input type="checkbox"/>		...
MU-BO-GF	Floor	<input type="checkbox"/>		...
MU-BO-GF-01_Sales	Room	<input type="checkbox"/>		...
MU-BO-GF-02_Serverflo	Room	<input type="checkbox"/>		...
MU-Headquarters	Building	<input type="checkbox"/>		...
MU-HQ-FL_I	Floor	<input type="checkbox"/>		...
MU-HQ-FL-I-01_Lab	Room	<input type="checkbox"/>		...
MU-HQ-FL-I-02_Account...	Room	<input type="checkbox"/>		...
MU-HQ-GF	Floor	<input type="checkbox"/>		...
MU-HQ-GF-01_Accounti	Room	<input type="checkbox"/>		...
MU-HQ-GF-01_Controlli	Room	<input type="checkbox"/>		...
MU-HQ-BM_I	Floor	<input type="checkbox"/>		...
MU-HQ-BM-I-01_IT	Room	<input type="checkbox"/>		...
MU-HQ-BM-I-02_Server...	Room	<input checked="" type="checkbox"/>		...
Berlin	City	<input type="checkbox"/>		...
BE-Headquarters	Building	<input type="checkbox"/>		...
BE-HQ-FL_II	Floor	<input type="checkbox"/>		...
BE-HQ-FL-II-01_Consulti	Room	<input type="checkbox"/>		...
BE-HQ-FL-II-02_Consulti	Room	<input type="checkbox"/>		...
BE-HQ-FL_I	Floor	<input type="checkbox"/>		...
BE-HQ-FL-I-01_HR	Room	<input type="checkbox"/>		...
BE-HQ-FL-I-02_HR	Room	<input type="checkbox"/>		...
BE-HQ-GF	Floor	<input type="checkbox"/>		...
BE-HQ-GF-01_Recruitment Room	Room	<input type="checkbox"/>		...
BE-HQ-GF-02_ServerRoom	Room	<input type="checkbox"/>		...
BE-BranchOffice	Building	<input type="checkbox"/>		...
BE-BO-GF	Floor	<input type="checkbox"/>		...

Editor Basic Functions

As soon as a site or an element of the physical infrastructure has been selected in the data tree, the editor can be opened. According to the selected element in the Docusnap tree structure, the respective company is selected in the editor.



In the first step, editing takes place within the editor via a tabular structure (grid).

Physical Infrastructure

NAME	SITE TYPE	ADDITIONAL INFORMATION	CHANGE IMAGE	
Munich	City			...
MU-BranchOffice	Building			...
MU-Headquarters	Building			...
Berlin	City			...
BE-Headquarters	Building			...
BE-BranchOffice	Building			...
Continent				...

The functions Create, Save and Delete are available for managing the locations.

All actions, such as adding, changing or deleting objects, are only applied after saving (shortcuts can also be used here - e.g. Ctrl + S).

It is possible to map the complete hierarchy and then save it as a whole.

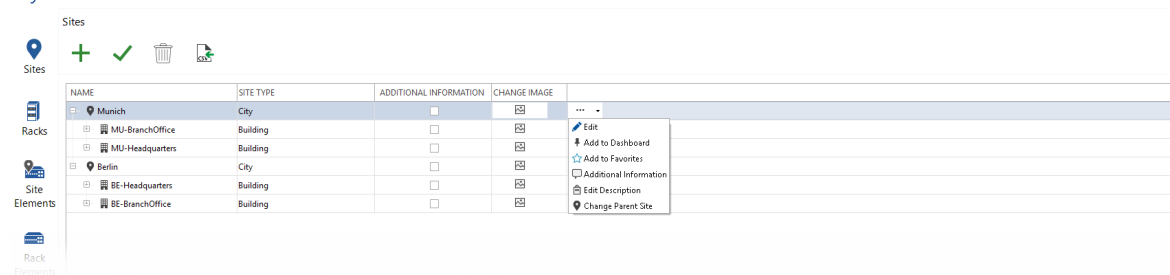
The color-coding of the elements indicates that the actions still have to be saved.

- Green: new element is added
- Pink: Element is deleted
- Blue: Change made to element

A previously made change, if it has not yet been saved, can be undone via the context menu.

The context menu offers at least the following options for each element. Depending on the element, further options are available, which will be dealt with in the later chapters.

Physical Infrastructure



NAME	SITE TYPE	ADDITIONAL INFORMATION	CHANGE IMAGE	
Munich	City	<input type="checkbox"/>		...
MU-BranchOffice	Building	<input type="checkbox"/>		<ul style="list-style-type: none"> Edit Add to Dashboard Add to Favorites Additional Information Edit Description Change Parent Site
MU-Headquarters	Building	<input type="checkbox"/>		
Berlin	City	<input type="checkbox"/>		
BE-Headquarters	Building	<input type="checkbox"/>		
BE-BranchOffice	Building	<input type="checkbox"/>		

Edit

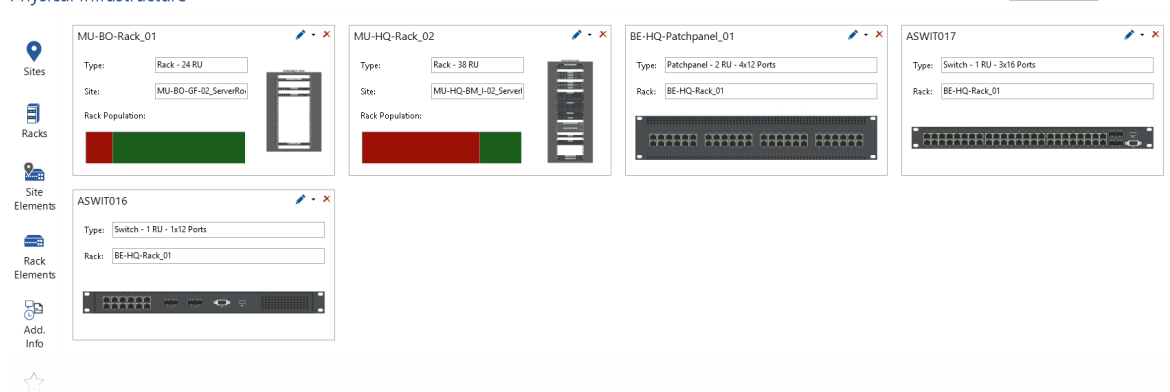
The selected object is edited. Alternatively, the object can be edited by double-clicking on the icon.

Add to Dashboard

The Dashboard is the entry point to the Infrastructure Editor. When opened, all added elements are available. The dashboard opens with a click on *Physical Infrastructure*.

The dashboard is user-specific and is therefore not transferred to other users.

Physical Infrastructure



Element	Type	Site	Rack	Population
MU-BO-Rack_01	Rack - 24 RU	MU-BO-GF-02_ServerRoi		
MU-HQ-Rack_02	Rack - 38 RU	MU-HQ-BM-I-02_Server		
BE-HQ-Patchpanel_01	Patchpanel - 2 RU - 4x12 Ports		BE-HQ-Rack_01	
ASWIT017	Switch - 1 RU - 3x16 Ports		BE-HQ-Rack_01	
ASWIT016	Switch - 1 RU - 1x12 Ports		BE-HQ-Rack_01	

Add to Favorites

Similar to the dashboard, elements can be added to favorites. Favorites are user-specific and are therefore not transferred to other users.

Add [Additional Information](#)

Additional information can be assigned to elements.

9.3 Manage Sites

DocuSnap offers the possibility to create sites to assign the systems, IT assets and racks to their physical location.

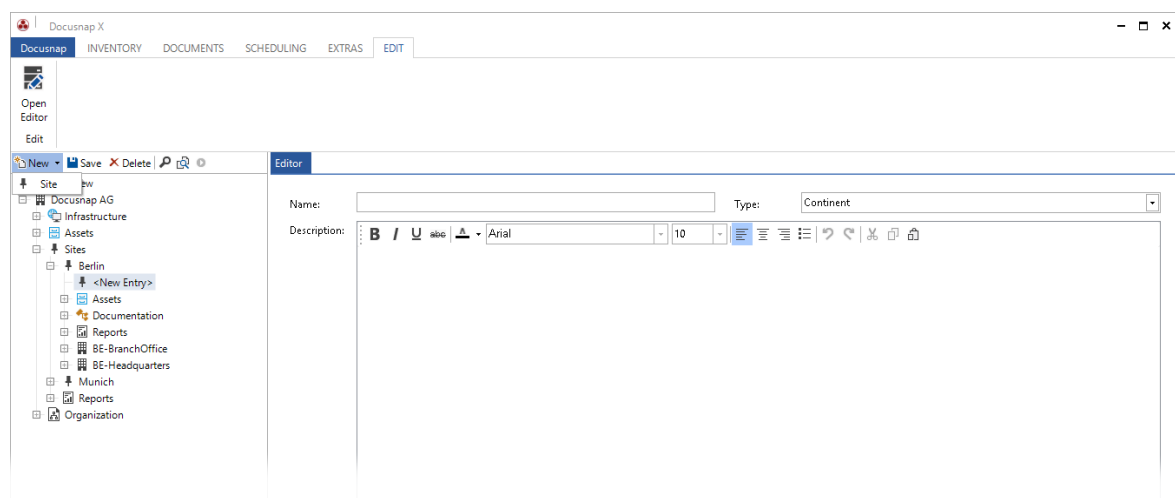
The sites can be created in DocuSnap in the tree structure or in the infrastructure editor.

In the tree structure the sites are created under the heading Sites for the respective company.

The name of the site can be chosen freely. In addition, a description can be given. For each site, a type is selected that determines the type of site, such as city, building, room, etc. If another type is needed, it can be added to the Docusnap Management.

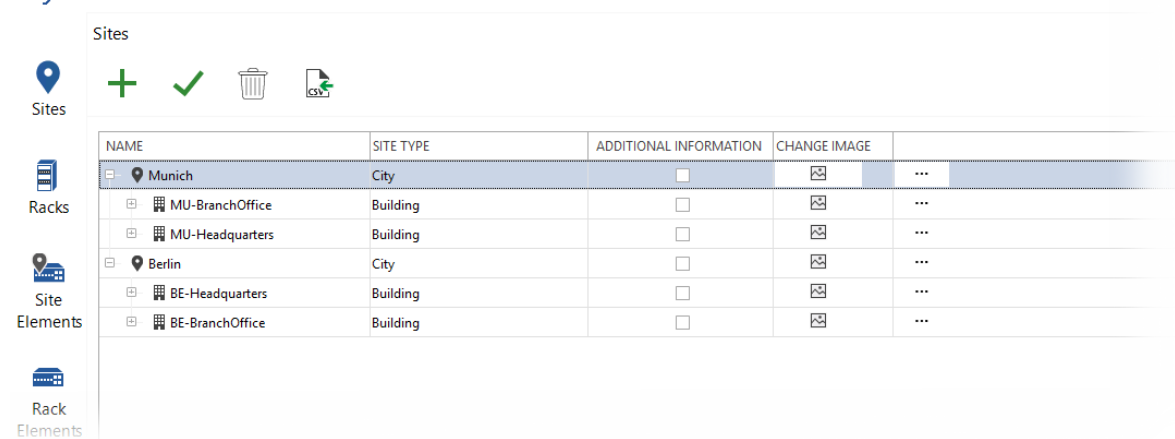
When creating a database or when creating a new company, a site of the type Standard Site is created for each company. This site can be renamed or deleted.

The sites can be created hierarchically in order to create rooms in buildings, for example. It is also possible to move the sites by drag & drop.



Within the editor, sites are created, edited or deleted in the *Sites* register. Existing sites can also be moved.

Physical Infrastructure

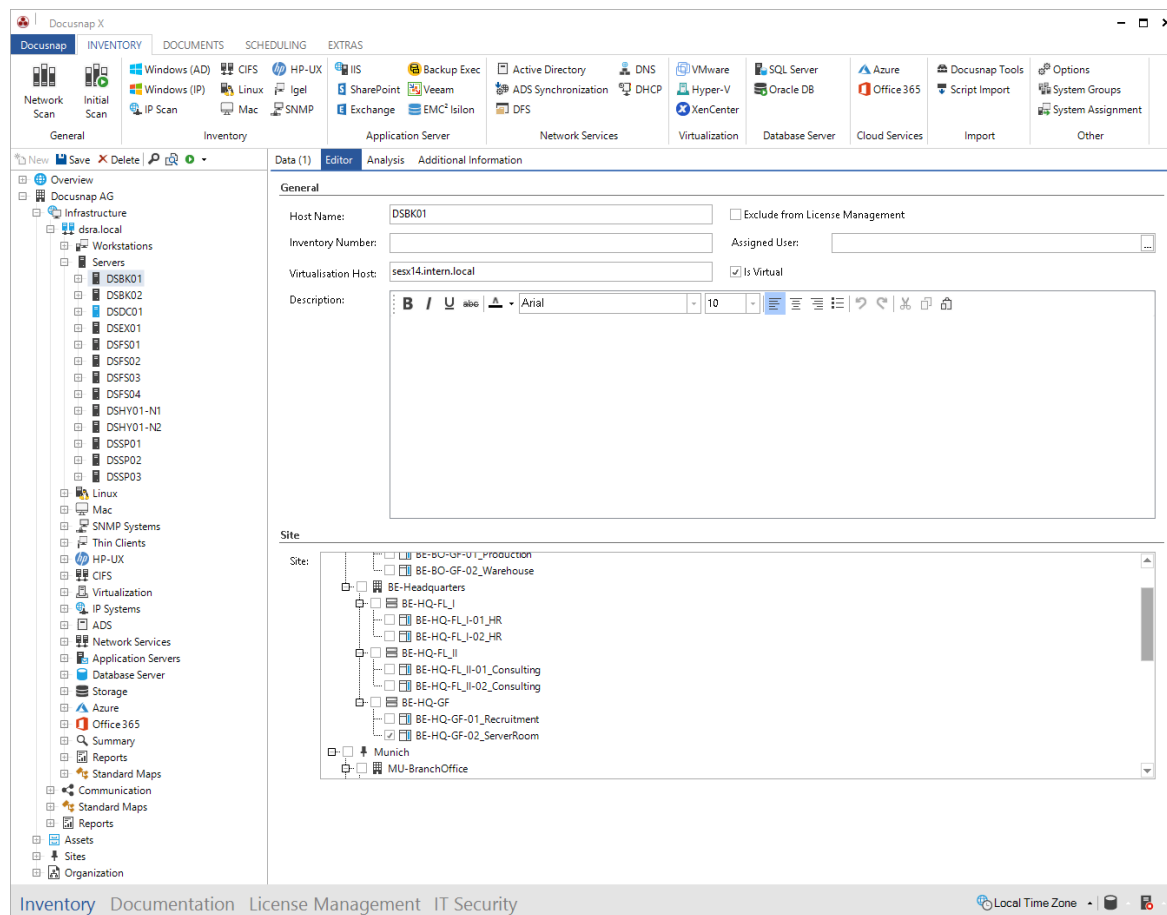


9.3.1 Assignment

There are several different possibilities for assigning the systems. Each system can be assigned to only one site.

Assignment at Systems

In the data entry screen of each system there is the group *Sites*. In this group the hierarchy of all existing sites of the respective company is displayed and the desired site can be selected.



Dialog System Assignment

Clicking on the *System Assignment* button in the ribbon *Inventory* opens the dialog for assigning the systems to sites. By selecting a site, all systems that have been assigned to this site or have not yet been assigned are displayed. Additional assignments can be made here or existing assignments can be deleted.

System Assignment

Company:
 Assignment Type:

	NAME	TYPE	ASSIGNMENT CRITERIA
	Munich	City	
	Meeting-Room	Room	
	Server-Room	Room	
	London	City	London
	New York	City	New York
	DefaultSite	Standard Site	

Automatic Assignment Criteria:

	SYSTEM NAME	DOMAIN
<input type="checkbox"/>	SMII0001	docusnap.intern
<input type="checkbox"/>	SMII0002	docusnap.intern
<input type="checkbox"/>	SMPS0001	docusnap.intern
<input checked="" type="checkbox"/>	SMSP0001	docusnap.intern
<input checked="" type="checkbox"/>	SMSP0002	docusnap.intern
<input type="checkbox"/>	SMSP0004	docusnap.intern
<input checked="" type="checkbox"/>	SMSQ0001	docusnap.intern
<input checked="" type="checkbox"/>	SMSQ0002	docusnap.intern
<input checked="" type="checkbox"/>	SMSQ0003	docusnap.intern
<input type="checkbox"/>	SMSQ0005	docusnap.intern

Assignment Criteria

With *Assignment Criteria*, conditions can be defined that assign systems to their respective sites during inventory. The criteria are created in Docusnap Management. See the configuration manual for more information. The *Assignment Criteria* are assigned to the sites in the *System Assignment* dialog. This allows the desired sites to be entered during the inventory process.

System Assignment

Company: Assignment Type:

	NAME	TYPE	ASSIGNMENT CRITERIA
[-]	Munich	City	
[-]	Meeting-Room	Room	
[-]	Server-Room	Room	
[-]	London	City	London
[-]	New York	City	New York
[-]	DefaultSite	Standard Site	

Automatic Assignment Criteria:

	SYSTEM NAME	
[-]		
<input type="checkbox"/>	SMII0001	
<input type="checkbox"/>	SMII0002	docusnap.intern
<input type="checkbox"/>	SMPS0001	docusnap.intern
<input checked="" type="checkbox"/>	SMSP0001	docusnap.intern
<input checked="" type="checkbox"/>	SMSP0002	docusnap.intern
<input type="checkbox"/>	SMSP0004	docusnap.intern
<input checked="" type="checkbox"/>	SMSQ0001	docusnap.intern
<input checked="" type="checkbox"/>	SMSQ0002	docusnap.intern
<input checked="" type="checkbox"/>	SMSQ0003	docusnap.intern
<input type="checkbox"/>	SMSQ0005	

Assignment to Discovery Service

When a new Discovery Service is created, for this discovery service can be defined to assign all systems to the selected site. This does not work for the Discovery service for the client or the server, as these DDS systems can inventory for all companies. However, assignment criteria can be used for the client and server DDS.

Configure Discovery Service

Name: Company:

Site:

☒ Activate Discovery Service

IP Segments:

Discovery Service:

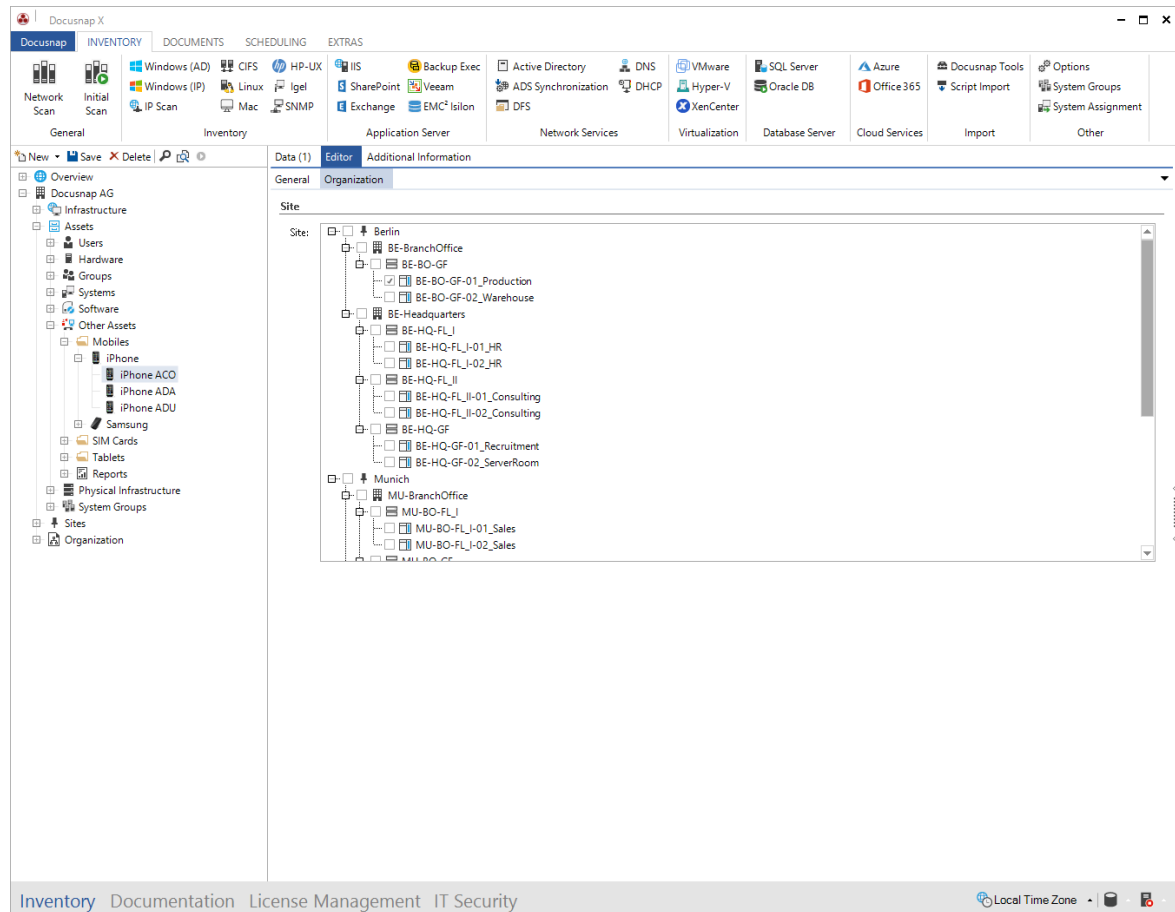
☐ Show Deactivated Discovery Services ☐ Show all Client Discovery Services

	DISCOVERY SERVICE NAME	STATUS	SYSTEM NAME	ENABLED	PLUGIN VERSION	LAST CONNECTION ESTABLISH
	Server-VPC		VPC-SGR	Yes	10.0.596.2	2/16/2017 2:22:28 PM
	Client-VPC		VPC-SGR	Yes	10.0.596.2	2/17/2017 8:17:10 AM
	<New entry>					



Assignment of IT Assets

There is also the ability to assign IT assets to sites. For each IT asset, the additional Organization tab is displayed. If user-defined IT asset classes are created, the additional tab is created automatically. In this tab the created IT assets can be assigned to a site.



9.3.2 Visualization

Systems, IT assets, racks, and elements assigned to a site are displayed below the site in the tree.

Network, routing, topology and site maps can be created under the heading *Documentation*. These maps contain only the systems and racks that have been assigned to this site. In addition, the *Overview Site* report can be created that lists all the associated system and IT assets.

In the license management, the evaluation of the licenses can also be calculated at the site level.

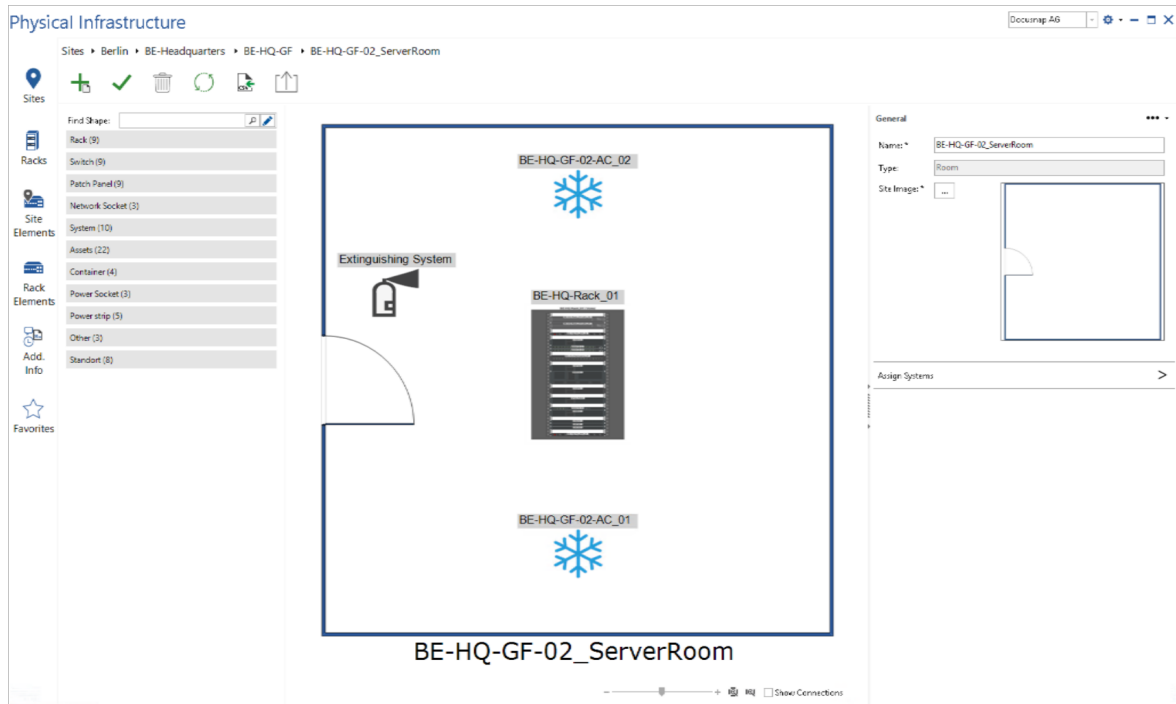
NAME	ONLINE	DOMAIN/WORKGROUP MEMBERSHIP	DOMAIN	DESCRIPTION
ASWIT013	Succeeded		dsra.local	
ASWIT015	Succeeded		dsra.local	
HPCZJ4500GZ4	Succeeded		dsra.local	

9.3.3 Site Map

The site map is part of the *Site Edit* function. The *Edit Site* function is opened in the data grid of the sites via the context menu or by double-clicking on the icon of the site.

The site map serves for the visual representation of the site. The site map can also be used to create elements via drag & drop (e.g. racks, air conditioning systems, etc.) and to assign inventoried systems. The created elements can be edited by double-clicking.





In the map the context menu can be opened with a right click on the displayed elements. This provides further options, e.g. display wiring map or edit and much more.

9.4 Site Elements

Site items are all items that can be added to a site. These are e.g. servers, network sockets, assets such as air conditioners or fire extinguishers.



Please note that the elements are only assigned to the site. They have to be positioned in the site map afterwards and assigned to an object.

Create and Manage Site Elements

Site elements can be created, edited and deleted within the *Site Elements* tab.

Physical Infrastructure Documap AG

Site Elements

Sites + ✓ ✕ 📄

Racks 📦

Site Elements 📍

Rack Elements 📦

Add. Info 📄

Favorites ★

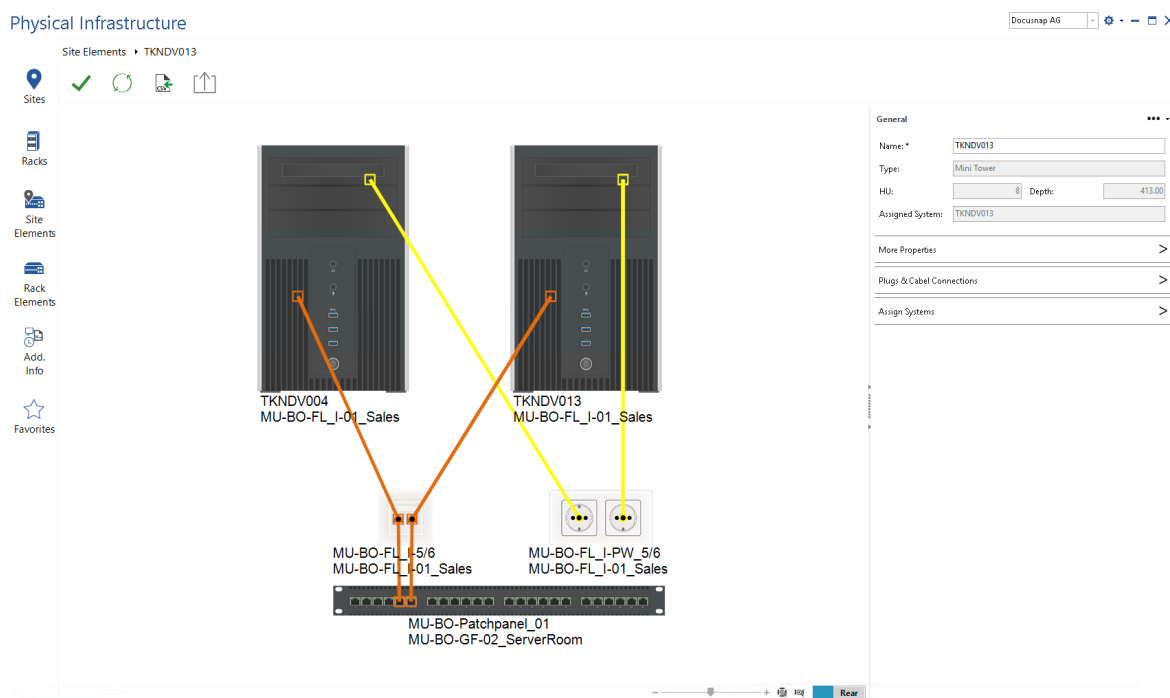
SITE	NAME	SITE	ELEMENT TYPE	ADDITIONAL INFORMATION
Munich	Munich		Extinguishing System	
MU-BO-FL-I-01_Sales			Extinguishing System	
MU-BO-FL-I-7/8	MU-BO-FL-I-01_Sales		HTC	
MU-BO-FL-I-5/6	MU-BO-FL-I-01_Sales		iPhone	
MU-BO-FL-I-PW_7/8	MU-BO-FL-I-01_Sales		Mini Tower	
MU-BO-FL-I-PW_5/6	MU-BO-FL-I-01_Sales		Monitor	
TKNDV003	MU-BO-FL-I-01_Sales		Network Socket - 1 Port	
TKNDV004	MU-BO-FL-I-01_Sales		Network Socket - 2 Ports	
TKNDV013	MU-BO-FL-I-01_Sales		Network Socket - 3 Ports	
TKNP0001	MU-BO-FL-I-01_Sales		Nokia	
			Oscilloscope	
MU-BO-GF-01_Sales			Patchpanel - 1 RU - 1x24 Ports	
MU-BO-GF-3/4	MU-BO-GF-01_Sales		Patchpanel - 1 RU - 3x16 Ports	
MU-BO-GF-1/2	MU-BO-GF-01_Sales		Patchpanel - 1 RU - 3x8 Ports	
MU-BO-GF-PW_3/4	MU-BO-GF-01_Sales		Patchpanel - 1 RU - 4x12 Ports	
MU-BO-GF-PW_1/2	MU-BO-GF-01_Sales		Patchpanel - 1 RU - 4x6 Ports	
			Patchpanel - 2 RU - 3x16 Ports	
			Patchpanel - 2 RU - 4x12 Ports	
			Patchpanel - 2 RU - 5x10 Ports	
TKNDV005	MU-BO-GF-01_Sales		POS Systems	
TKNDV006	MU-BO-GF-01_Sales		Power Strip - 3 Plugs	
TKNP0005	MU-BO-GF-01_Sales		Power Strip - 4 Plugs	
			Power Strip - 6 Plugs	
MU-BO-GF-02_ServerRoom			Power Strip - Rack Mounting	
MU-BO-GF-PW_5/6	MU-BO-GF-02_ServerRoom		Rack Drawer - 0.5 RU	
			Rack Drawer - 1 RU	
			Rack Drawer - 2 RU	
BE-HQ-FL-II-01_Consulting			Rack Drawer - 4 RU	
BE-HQ-FL-II-3/4	BE-HQ-FL-II-01_Consulting		Rack USB	
BE-HQ-FL-II-1/2	BE-HQ-FL-II-01_Consulting		Samsung	
NKNGPRO	BE-HQ-FL-II-01_Consulting		Samsung Galaxy Tab	
BE-HQ-FL-II-PW_3/4	BE-HQ-FL-II-01_Consulting		Server - 1 RU - 4 Ports - 1 Power	
BE-HQ-FL-II-PW_1/2	BE-HQ-FL-II-01_Consulting		Server - 1 RU - 4 Ports - 2 Power	
TKNSCH06	BE-HQ-FL-II-01_Consulting		Server - 2 RU - 6 Ports - 1 Power	
TKNSCH04	BE-HQ-FL-II-01_Consulting		Server - 2 RU - 6 Ports - 2 Power	
			Server - 4 RU - 6 Ports - 2 Power	
			Server - 4 RU - 6 Ports - 4 Power	

Within the Site Elements grid, elements can be assigned to sites. The assigned elements can then be positioned in the site map.

Site Element Map

The Site Element Map provides a graphical overview of the selected element. Furthermore, cable connections are defined here, properties are adapted and system assignments are implemented.

The Site Element Map can be opened via the context menu in the tab *Site Elements*.



If other elements are connected to the selected element, the direct connections are displayed in the Site Element Map.

The mouse over function for individual cabling displays more detailed information about this.

9.5 Racks

A rack is created in the infrastructure editor. Elements are then added to the rack. Inventoried or manually added systems (assets) can then be assigned to these elements.



Create and Manage Racks

In the Infrastructure Editor, new racks can be created or existing ones managed in the *Racks* area.

Predefined shapes are supplied as standard. New shapes can be created with the *Shape Editor*.

If a new rack shape is created, the slot counting direction can be defined in addition to the height.

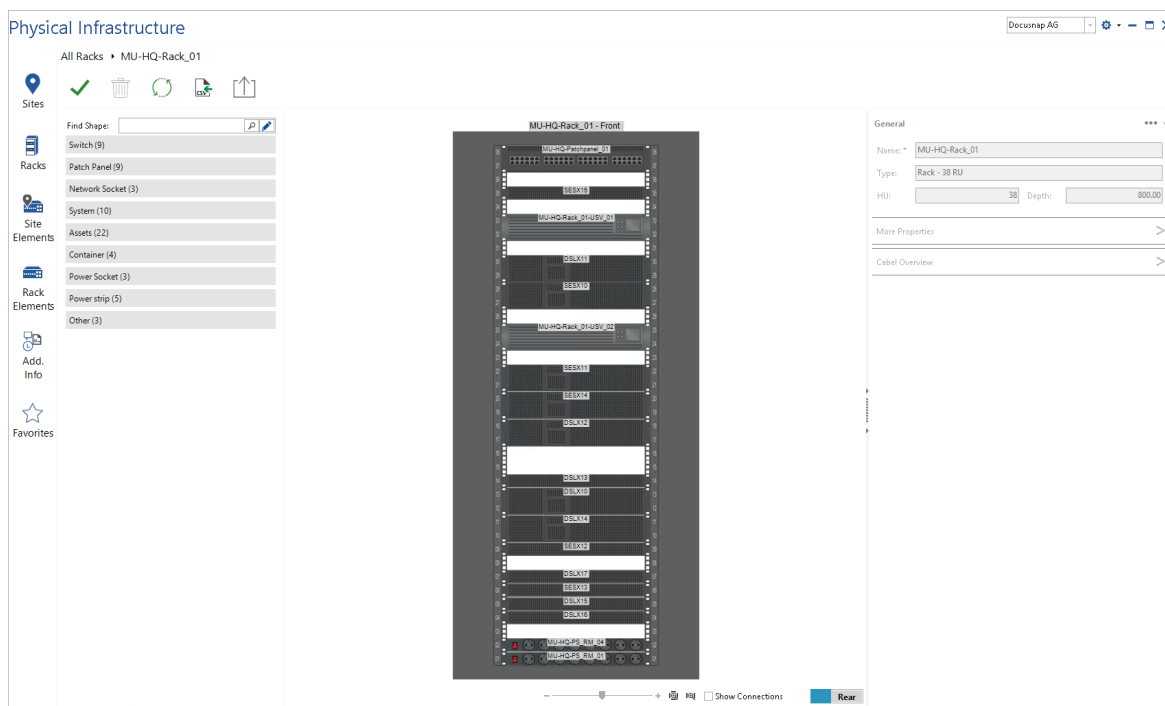
The rack can then be selected for editing via the context menu.

Elements can be inserted into the rack via drag & drop.

The inserted elements can be marked and edited in the toolbox. The element can be inserted forwards or backwards.

Once a rack element has been selected, an inventoried or manual object can be assigned to it. An assignment is made within the toolbox using *Assign Systems*.

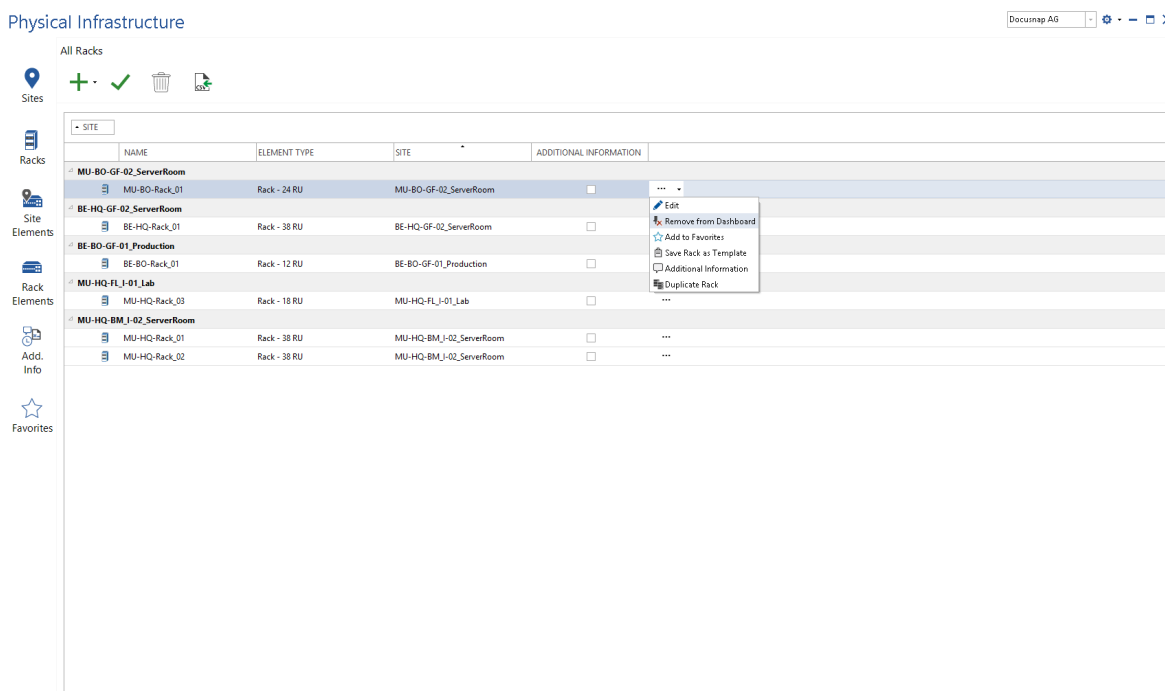
The name of the rack element is automatically set during a system assignment.



Clone and Export / Import Racks

Existing racks can be duplicated or saved as templates.

To duplicate a rack or save it as a template, open the context menu of the desired rack. This option can also be found in the site map or in the rack map.



If the rack is saved as a template, the information is saved in an XML file. When a new rack is created, the *Create Rack from Template* option is available.

If the rack is duplicated, it will be created with all components included.

If a rack is duplicated or created from a template, the properties of the rack and the elements have to be adjusted.

9.6 Rack Elements

Rack elements are those components that are inserted into a rack.

In the Rack Elements area, elements can be added to a rack via the grid. Elements that are assigned to the rack via the grid are not automatically positioned in the rack. The elements have to be positioned in the rack map afterwards.



It should be noted that no validation takes place as to whether there is still sufficient space in the rack.

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Rack Elements

Sites
 Racks
 Site Elements
 Rack Elements
 Add. Info
 Favorites

	NAME	SITE	RACK	ELEMENT TYPE	INSTALL FORWARD	HEIGHT UNIT	ADDITIONAL INFORMATION
BE-BO-Rack_01							
xxx	BE-BO-PS_RM_01	BE-BO-GF-01_Production	BE-BO-Rack_01	Power Strip - Rack Mounting	<input checked="" type="checkbox"/>	2	<input type="checkbox"/> ...
xxx	BE-BO-Patchpanel_01	BE-BO-GF-01_Production	BE-BO-Rack_01	Patchpanel - 1 RU - 4x6 Ports	<input checked="" type="checkbox"/>	9	<input type="checkbox"/> ...
xxx	ASWIT011	BE-BO-GF-01_Production	BE-BO-Rack_01	Switch - 1 RU - 1x12 Ports	<input checked="" type="checkbox"/>	11	<input type="checkbox"/> ...
BE-HQ-Rack_01							
xxx	BE-HQ-Rack_01-USV_02	BE-HQ-GF-02_ServerRoom	BE-HQ-Rack_01	Rack USV	<input checked="" type="checkbox"/>	36 - 37	<input type="checkbox"/> ...
xxx	DSEX01	BE-HQ-GF-02_ServerRoom	BE-HQ-Rack_01	Server - 1 RU - 4 Ports - 2 Power Pla...	<input checked="" type="checkbox"/>	5	<input type="checkbox"/> ...
xxx	DSFS01	BE-HQ-GF-02_ServerRoom	BE-HQ-Rack_01	Server - 1 RU - 4 Ports - 2 Power Pla...	<input checked="" type="checkbox"/>	4	<input type="checkbox"/> ...
xxx	DSBK01	BE-HQ-GF-02_ServerRoom	BE-HQ-Rack_01	Server - 2 RU - 6 Ports - 2 Power Pla...	<input checked="" type="checkbox"/>	7 - 8	<input type="checkbox"/> ...
xxx	DSSP01	BE-HQ-GF-02_ServerRoom	BE-HQ-Rack_01	Server - 2 RU - 6 Ports - 2 Power Pla...	<input checked="" type="checkbox"/>	14 - 15	<input type="checkbox"/> ...
xxx	DSFS03	BE-HQ-GF-02_ServerRoom	BE-HQ-Rack_01	Server - 1 RU - 4 Ports - 2 Power Pla...	<input checked="" type="checkbox"/>	3	<input type="checkbox"/> ...
xxx	DSBK02	BE-HQ-GF-02_ServerRoom	BE-HQ-Rack_01	Server - 2 RU - 6 Ports - 2 Power Pla...	<input checked="" type="checkbox"/>	29 - 30	<input type="checkbox"/> ...
xxx	DSFS02	BE-HQ-GF-02_ServerRoom	BE-HQ-Rack_01	Server - 2 RU - 6 Ports - 2 Power Pla...	<input checked="" type="checkbox"/>	21 - 22	<input type="checkbox"/> ...
xxx	ASWIT016	BE-HQ-GF-02_ServerRoom	BE-HQ-Rack_01	Switch - 1 RU - 1x12 Ports	<input checked="" type="checkbox"/>	9	<input type="checkbox"/> ...
xxx	ASWIT017	BE-HQ-GF-02_ServerRoom	BE-HQ-Rack_01	Switch - 1 RU - 3x16 Ports	<input checked="" type="checkbox"/>	28	<input type="checkbox"/> ...
xxx	AFWUTM01	BE-HQ-GF-02_ServerRoom	BE-HQ-Rack_01	Server - 2 RU - 6 Ports - 2 Power Pla...	<input checked="" type="checkbox"/>	11 - 12	<input type="checkbox"/> ...
xxx	BE-HQ-Patchpanel_01	BE-HQ-GF-02_ServerRoom	BE-HQ-Rack_01	Patchpanel - 2 RU - 4x12 Ports	<input checked="" type="checkbox"/>	24 - 25	<input type="checkbox"/> ...
xxx	BE-HQ-PS_RM_01	BE-HQ-GF-02_ServerRoom	BE-HQ-Rack_01	Power Strip - Rack Mounting	<input checked="" type="checkbox"/>	1	<input type="checkbox"/> ...
xxx	BE-HQ-PS_RM_02	BE-HQ-GF-02_ServerRoom	BE-HQ-Rack_01	Power Strip - Rack Mounting	<input checked="" type="checkbox"/>	32	<input type="checkbox"/> ...
xxx	BE-HQ-Rack_01-USV_01	BE-HQ-GF-02_ServerRoom	BE-HQ-Rack_01	Rack USV	<input checked="" type="checkbox"/>	34 - 35	<input type="checkbox"/> ...
xxx	ASWIT018	BE-HQ-GF-02_ServerRoom	BE-HQ-Rack_01	Switch - 1 RU - 3x16 Ports	<input checked="" type="checkbox"/>	27	<input type="checkbox"/> ...
xxx	DSDC01	BE-HQ-GF-02_ServerRoom	BE-HQ-Rack_01	Server - 4 RU - 6 Ports - 4 Power Pla...	<input checked="" type="checkbox"/>	17 - 20	<input type="checkbox"/> ...
MU-BO-Rack_01							
xxx	MU-BO-PS_RM_01	MU-BO-GF-02_ServerRoom	MU-BO-Rack_01	Power Strip - Rack Mounting	<input checked="" type="checkbox"/>	2	<input type="checkbox"/> ...
xxx	MU-BO-Patchpanel_01	MU-BO-GF-02_ServerRoom	MU-BO-Rack_01	Patchpanel - 1 RU - 4x6 Ports	<input checked="" type="checkbox"/>	23	<input type="checkbox"/> ...
xxx	ASWIT013	MU-BO-GF-02_ServerRoom	MU-BO-Rack_01	Switch - 1 RU - 1x12 Ports	<input checked="" type="checkbox"/>	20	<input type="checkbox"/> ...
xxx	ASWIT015	MU-BO-GF-02_ServerRoom	MU-BO-Rack_01	Switch - 1 RU - 4x12 Ports	<input checked="" type="checkbox"/>	18	<input type="checkbox"/> ...
MU-HQ-Rack_01							
xxx	MU-HQ-Rack_01-USV_02	MU-HQ-BM_02_ServerRoom	MU-HQ-Rack_01	Rack USV	<input checked="" type="checkbox"/>	24 - 25	<input type="checkbox"/> ...

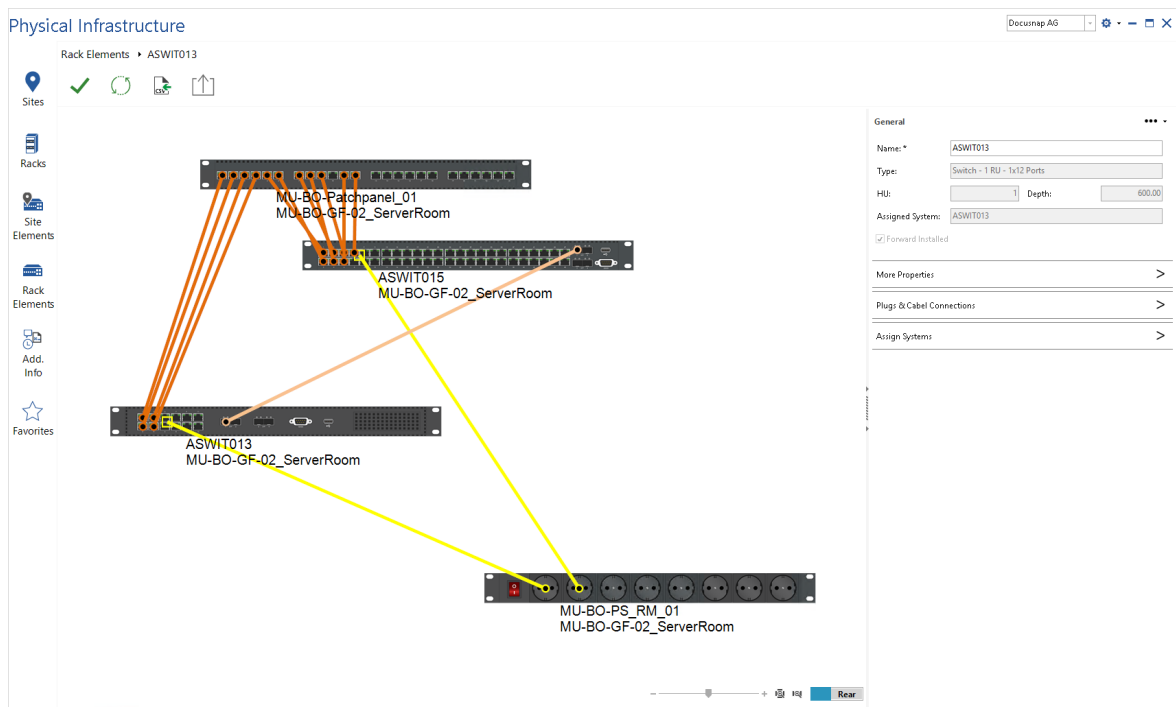
Rack Element Map

If the editing of a rack element is started via the context menu, the Rack Elements Map is opened.

With the help of the toolbox, the rack element can be edited, cable connections can be stored or a systems can be assigned.

In the case the wiring is defined, the direct connections are displayed.

The mouse over function for individual cabling displays more detailed information about this.



9.7 Shapes

Shapes in Docusnap are graphical images of elements. These are needed, for example, to visually represent the structure of a rack. Examples for shapes are servers, workstations, power strips, UPS, patch panels, etc.

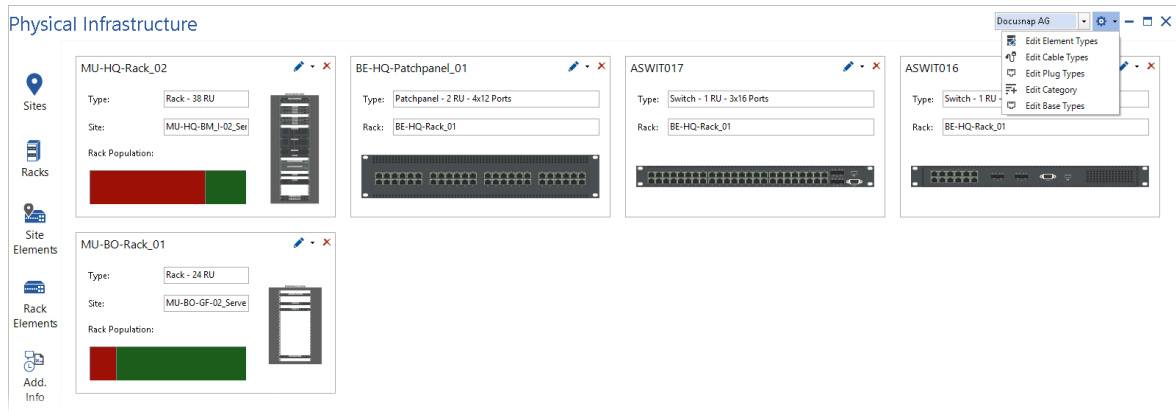
Shape Editor

Docusnap supplies ready-made shapes. The existing shape collection can be extended using the *Shape Editor*.

For newly created other assets, a corresponding shape is automatically created.

Use Shape Editor

The Shape Editor is started within the Infrastructure Editor via the button and the selection *Edit Element Types*.



New - Element (Shape Editor) can now be selected in the newly opened *Manage Shapes* window.

Working with the Shape Editor

Adding new shapes

In order to be able to create new shapes, corresponding image files are required first. Please note that front and back side are required.

In the first step information regarding name, type, height, width and depth are entered. The values refer to the actual size of the object.

The image files are then made available. Image files can be made available to the Shape Editor already cut. However, the Shape Editor also has an integrated *Crop* mode.

[illegible]

Define Plugs

Docusnap automatically recognizes the possible plug connections of the shape. The following figure shows the detected plugs (marked red).



By adjusting the plug width and height, the algorithm is able to detect plug connections that were not detected during the first run.



Shape Editor

Element Details

Name:

HPE DL380 Gen 10

Type:

Switch

Height:

2.00

HU

Width:

19.00

inch

Depth:

400

in mm

Description:

HPE DL380 Gen 10 Shape

Front Image

Back Image

Select Image:

C:\Pictures\HPE DL380 Gen 10 - Back.png

Plug Width:

118

Plug Height:

118

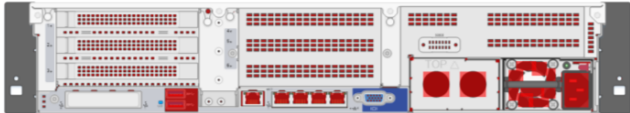
Plug Type:

Audio Input

Plug Group Name:

Advanced Options

↑ ↔ ↶ ↷ ↻ Mode: Select



↑ Up ↓ Down ✖ Delete Plug

NR.	NAME	TYPE	GROUP NAME
-----	------	------	------------

Save

Cancel

A connector is defined by selecting the plug type on the shape. By clicking on the red area representing the connector, it is added to the list as a plug. Before a selection is made, the appropriate plug type should be selected so that it does not have to be adjusted manually afterwards.

Shape Editor

Element Details

Name:

Type: Height: HU Width: inch Depth: in mm

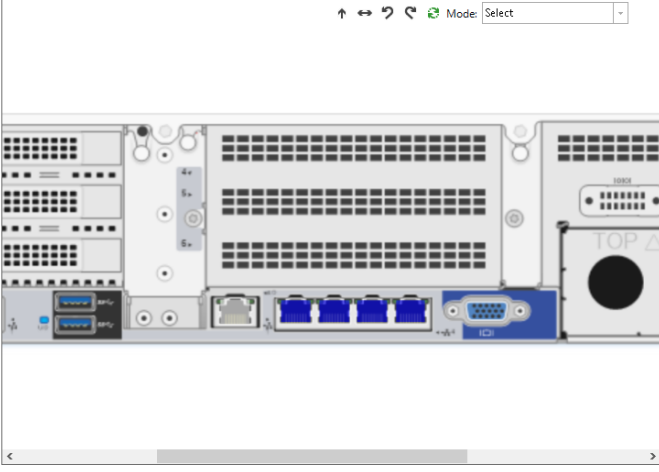
Description:

Front Image **Back Image**

Select Image: Plug Width: Plug Height:

Plug Type: Plug Group Name:

Mode:



NR.	NAME	TYPE	GROUP NAME
1	1	RJ-45	Network
2	2	RJ-45	Network
3	3	RJ-45	Network
4	4	RJ-45	Network

Add Undetected Plugs

If individual plugs are not detected automatically, they can be added manually. The *Define Plug Manually* mode is used for this purpose.

The position of the plug can be defined with the aid of four marking points.



Shape Editor

Element Details

Name:

Type: Height: HU Width: inch Depth: in mm

Description:

Front Image **Back Image**

Select Image: Plug Width: Plug Height:

Plug Type: Plug Group Name: **Advanced Options**


Mode: **Define Plug Manually**

↑ Up ↓ Down × Delete Plug

NR.	NAME	TYPE	GROUP NAME
1	1	RJ-45	Network
2	2	RJ-45	Network
3	3	RJ-45	Network
4	4	RJ-45	Network

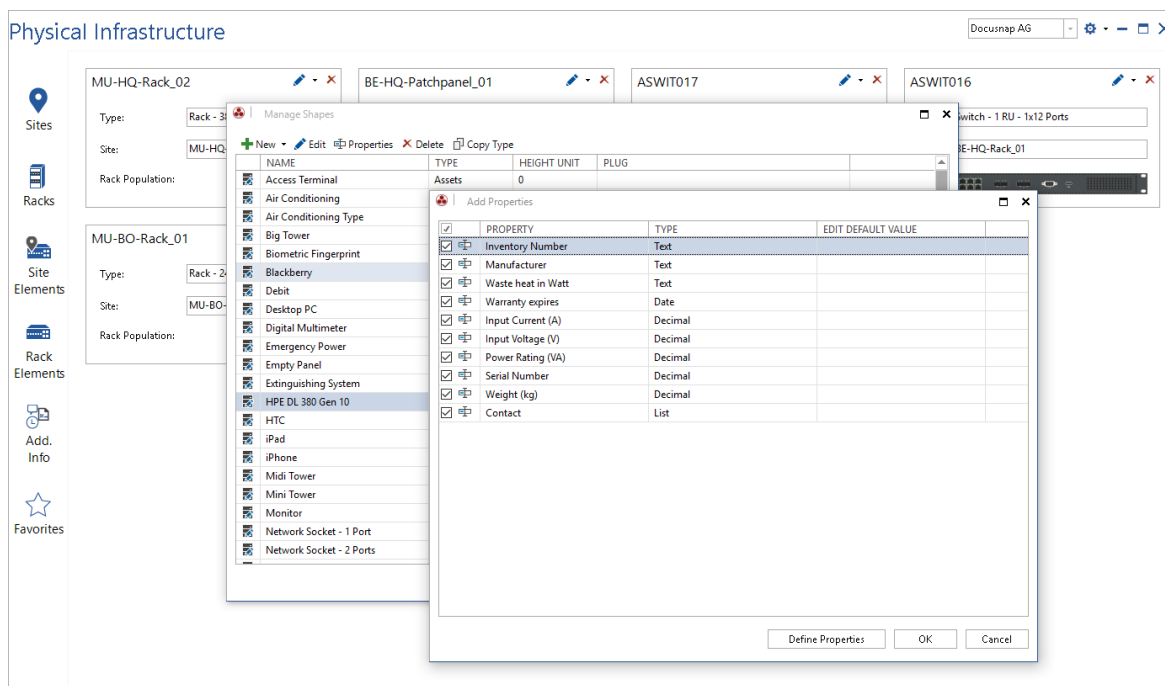
Save Cancel

Add Properties

Further properties (e.g. weight, current consumption etc.) can be added to an element via  and the *Edit Element Types* option.

To assign properties to an element, it must be selected. The *Properties* button opens an overview of the available properties.

The *Define Properties* button can be used to create additional properties and assign them to the element.



Edit Plug Types

The dialog to edit the plugs types is opened within the Infrastructure Editor - via and the selection *Edit Plug Types*.

All plugs created in Docusnap have a basic type. Only plugs that share the same basic types can be wired to each other. The different plugs can be assigned to several basic types. E.g. SFP + corresponds to the type "Network" as well as "Fibre-optic".

The PlugCount specifies the number of possible connections per plug. This is required if several connections are possible with one port, e.g. with a TERA cabling.

Edit Cable Types

The dialog to edit the cable types is opened within the Infrastructure Editor - via and the selection *Edit Cable Types*.

All connections created in Docusnap have a basic type. Cable types can only be wired with a plug that shares the same basic types.

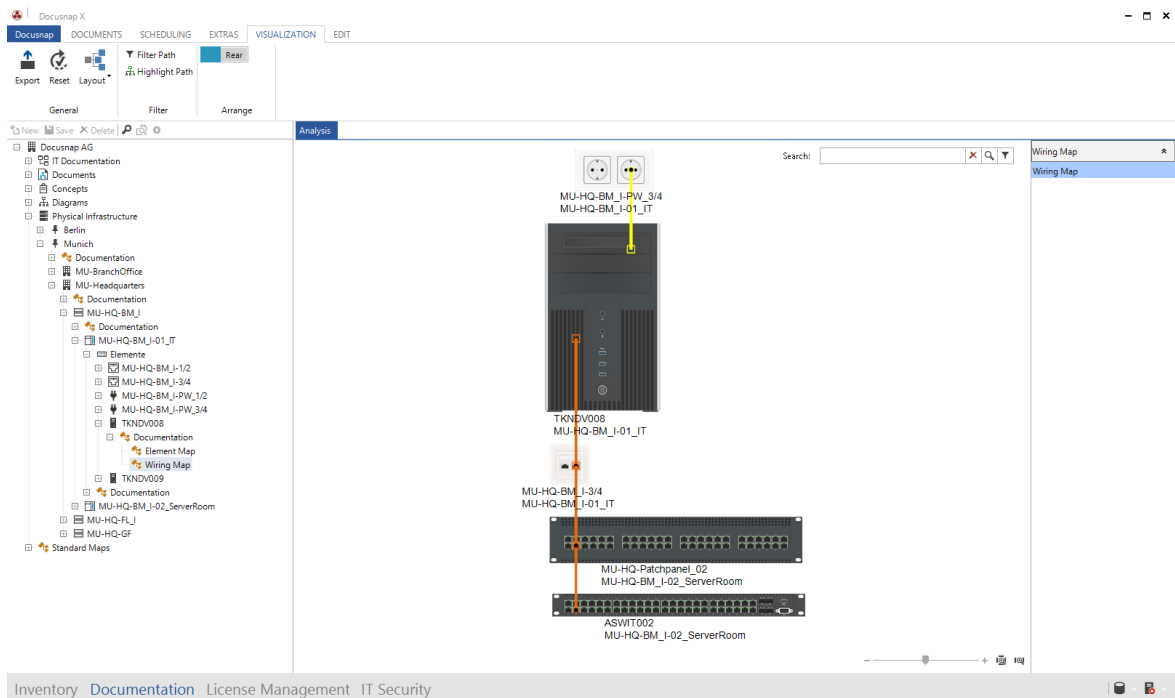
The number of possible ports per side can be defined by means of the number of A/B plugs.

9.8 Document Wiring

By modelling the physical infrastructure it is possible to document the wiring.

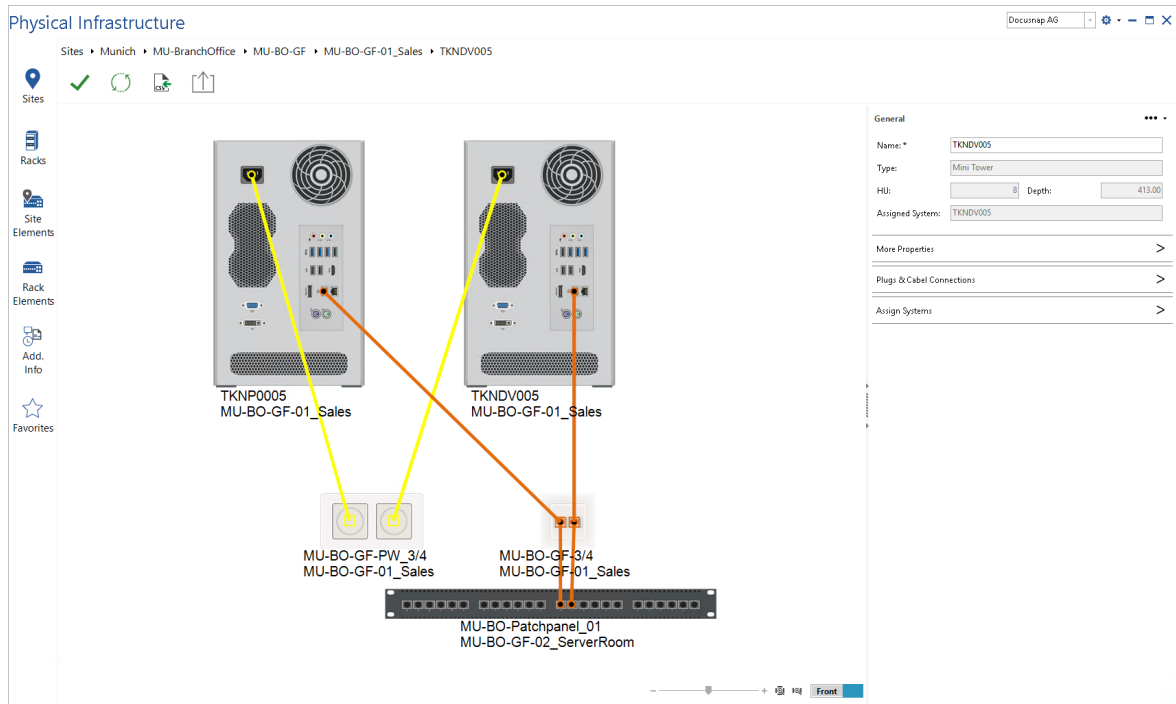
Before cabling routes can be mapped, the corresponding elements must be stored in Docusnap. These elements could be, for example

- Several sites of the type room
- One or more racks in which switches and patch panels are added
- One or more network sockets available in the rooms
- Elements of the type workstations in rooms
- Defined plugs
- Defined cable types



Cable Types

Different cable types are required to model the complete wiring. Docusnap contains standard cable types. Further cable types can be added in the menu under *Edit Cable Types*.



The required cable types can then be defined in the next dialog.

Adding Wiring

In order to define a wiring, it is necessary to switch to the editing of the element. The connections to other elements can be specified in the toolbox under *Plug & Cable Connections*.





It should be noted that some elements require a connection for the front and rear sides. E.g. patch panels or network sockets.

If an element is linked to a switch, the topology plan of the linked switch can be displayed. This is opened with the help of the button *Switch Assignment* within the toolbox *Plugs & Cable Connections*.

By means of the three points a description can be deposited for a single port. The name of the plug can be edited directly in the *Plug* column.

< Back to Overview

Plug

Adjust Cable Connection Switch Assignment

	PLUG	NR.	GROUP	WIRED WITH	
	1	1			...
	2	2			Change Description

A new cable connection can be defined for this object using the cable connections dialog. This can be opened via the button *Adjust Cable Connection* or via a double click in the *WIRED WITH* column.

The cable name, the cable type, the cable color, the element name of start and destination as well as the port can be defined.

All existing cable connections are displayed in the editing dialog. The default setting, however, is a filter that filters the data grid to the previously selected port.

If a new entry is created, the desired cable type must be selected. Then one or more ports can be connected depending on the cable type. The checkbox at the cable side indicates the starting point and the end point of the connection. An empty checkbox corresponds to Start and a set checkbox corresponds to Endpoint.

Cable Connections

Name:

Cable Type: Cable Color:

ELEMENT	PORT	CABLE DIRECTION
BE-BO-GF-1/2	1 - Rear	<input type="checkbox"/>
BE-BO-Patchpanel_01	1 - Rear	<input checked="" type="checkbox"/>

New Save Delete

NAME	CONNECTION	COLOR
MU-HQ-Patchpanel_02 - 22 <-> MU-HQ...		Orange
MU-HQ-Patchpanel_02 - 23 <-> MU-H...		Orange
MU-HQ-Patchpanel_02 - 24 <-> MU-H...		Orange
MU-HQ-Rack_01-USV_02 - Network <-> ...		Orange
MU-HQ-Rack_01-USV_01 - Network <-> ...		Orange
DSLX16 - 1 <-> MU-HQ-Patchpanel_01 ...		Orange
DSLX14 - 1 <-> MU-HQ-Patchpanel_01 ...		Orange
DSLX13 - 1 <-> MU-HQ-Patchpanel_01 ...		Orange
DSLX11 - 1 <-> MU-HQ-Patchpanel_01 ...		Orange
DSLX15 - 1 <-> MU-HQ-Patchpanel_01 ...		Orange
DSLX10 - 1 <-> MU-HQ-Patchpanel_01 ...		Orange
DSLX17 - 1 <-> MU-HQ-Patchpanel_01 ...		Orange
DSLX12 - 1 <-> MU-HQ-Patchpanel_01 ...		Orange
SESX13 - 1 <-> MU-HQ-Patchpanel_01 ...		Orange
SESX14 - 1 <-> MU-HQ-Patchpanel_01 ...		Orange
SESX15 - 1 <-> MU-HQ-Patchpanel_01 ...		Orange
SESX10 - 1 <-> MU-HQ-Patchpanel_01 ...		Orange
SESX12 - 1 <-> MU-HQ-Patchpanel_01 ...		Orange
SESX11 - 1 <-> MU-HQ-Patchpanel_01 ...		Orange
MU-HQ-Patchpanel_02 - 17 <-> ASWIT...		Orange
MU-HQ-Patchpanel_02 - 13 <-> ASWIT...		Orange
NPI582BAE - 1 <-> MU-HQ-FLJ-5/6 - 1		Yellow
NPI582BAE - Power <-> MU-HQ-FLJ-P...		Yellow
RJ45-Netzwerk...	RJ45 Netzwerkdose - 1 <-> PC - 3 - Net...	Orange
RJ45-Patchpan...	RJ45 Netzwerkdose - 1 <-> RJ45 Patchpa...	Orange
Tera-Netzwerkd...	TERA Netzwerkdose - 1,TERA Netzwerkd...	Red
Tera-Netzwerkd...	TERA Netzwerkdose - 1,TERA Netzwerkd...	Red
Tera-Patchpane...	TERA Netzwerkdose - 1 <-> TERA Patch...	Orange

OK

9.9 Documentation and Analysis

Reports

DocuSnap provides various reports on the physical infrastructure. These can be found in the tree structure below the sites.

The following reports are available.

- **Rack Summary**
Outputs information about the rack. It also includes existing properties. Information on installed elements is also displayed.
- **Rack Summary - Site**
All racks of the site and the subordinate sites are considered.
- **Patch Panel Summary**
Outputs information about the patch panel. Existing properties are taken into account. Information about wired elements is also displayed.
- **Patch Panel Summary - Site**
All patch panels of the site and the subordinate sites are considered.
- **Dashboard Summary**
Overview of the elements added to the dashboard.
- **Favorites Summary**
Overview of the elements added to the favorites.



■ Patch Panel Cabling Overview

Overview of the patch panel assignment and the further cabling.

Maps

A visual evaluation of the physical infrastructure can be carried out with the help of maps. These can be found in the tree structure within the navigation area Inventory and Documentation.

These maps are ad hoc maps. They are thus regenerated when opened and always refer to the most current data.

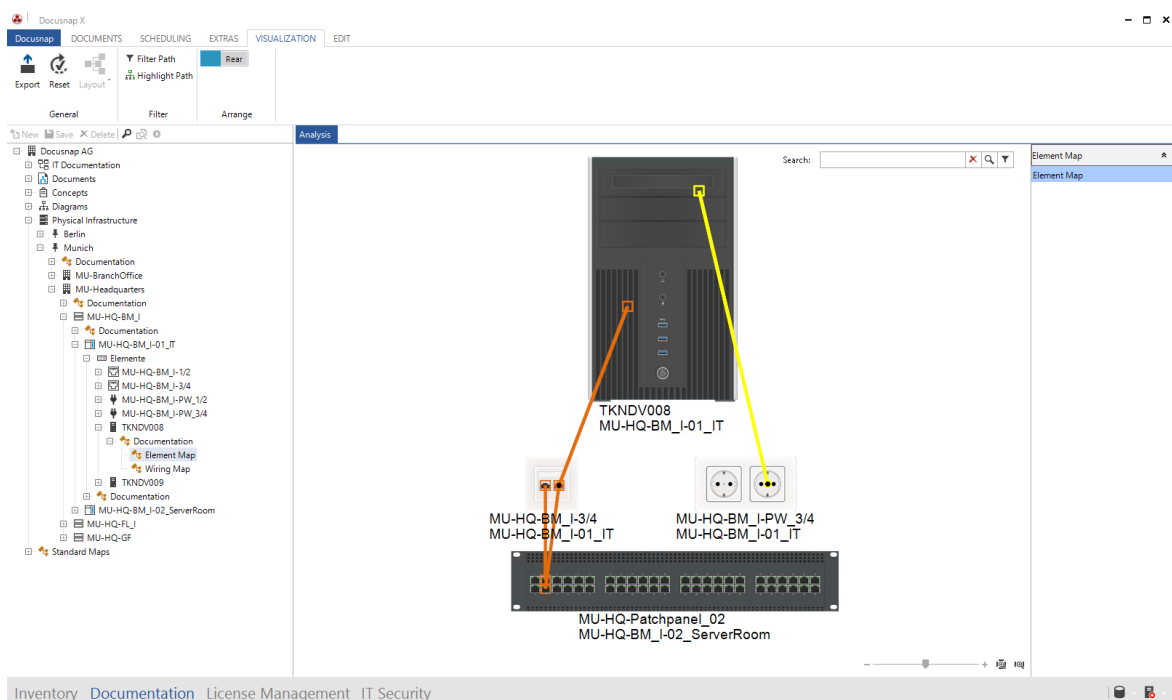
Maps are not only displayed in Docusnap, but can be exported in different formats (PNG, Visio, HTML, SVG).

Element Map

The element map can be opened below an element in the tree structure. This map shows the connection between the element and other elements. Only the direct connections of the element are displayed.

Using the ribbon you can control whether the front or rear side of the elements should be shown.

The mouse over function for individual cabling displays more detailed information about this.



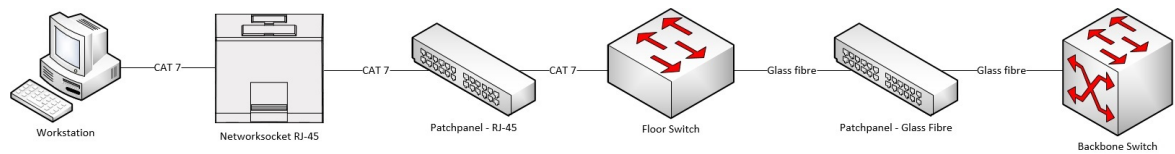
Wiring Map

The wiring map can be opened below a single element in the tree structure. This plan shows the continuous wiring path of the corresponding element to the end point. For example, the network cabling of a workstation to the backbone switch.

Using the ribbon you can control whether the front or rear side of the elements

should be shown.

The mouse over function for individual cabling displays more detailed information about this.



Site Map

The site map can be found below a site. The site map shows the structure of the site. This concerns the site image as well as the positioning of the site elements.

Rack Map

The rack map reflects the physical structure of a rack. The positioning of the rack elements in the rack is shown. The map can be found below a rack.

Using the ribbon you can control whether the front or rear side of the elements should be shown.

If the check box *Show Connections* is checked, the connections of the elements within the rack are displayed.

The mouse over function for individual cabling displays more detailed information about this.

Data Output and Further Processing

In addition to reports and maps the documented physical infrastructure can be output and further processed with the following functions.

Docusnap Connect

Using Docusnap Connect, user-defined packages can be exported. These contain the desired information from the physical infrastructure.

Docusnap Concepts

Maps, reports and overviews from the physical infrastructure can be integrated into concepts.

Grid Export

Possibility of direct Excel export. Overviews in data grids can be exported directly into an Excel table.

9.10 Physical Infrastructure - CSV Import

Physical infrastructure information can be imported via CSV import. The general requirements for the CSV file are listed below.

- The character ; (semicolon) is used as a separator.
- A heading is always expected in the first line. This row will not be considered during the import.

- The names of the columns are not relevant.
- Docusnap assigns the names of the entries to the dependent objects to import the CSV data. ID's cannot be used.
- If data records to be imported are not complete or cannot be assigned, they are imported in the Import dialog and can be manually adjusted there.
- If data records already exist, duplicates are created.
- The order of the columns must be observed. This is specified in the individual points.

Sites

Site name

- Site Type
- Parent Site (empty if at the top of the hierarchy)

	A	B	C	D
1	Site	Type	Superior Site	
2	Frankfurt	City		
3	Berlin	City		
4	Hamburg	City		
5	Nuremberg	City		
6	Dusseldorf	City		
7	Freiburg	City		
8	Bremen	City		
9	Ingolstadt	City		
10	Regensburg	City		
11				
12				
13				
14				

Physical Infrastructure Docu:map AG

Sites

Sites

Racks

Site Elements

Rack Elements

Add. Info

Favorites

NAME	SITE TYPE	ADDITIONAL INFORMATION	CHANGE IMAGE	
Munich	City	<input type="checkbox"/>		...
MU-BranchOffice	Building	<input type="checkbox"/>		...
MU-Headquarters	Building	<input type="checkbox"/>		...
London	City	<input type="checkbox"/>		...
New York	City	<input type="checkbox"/>		...
Frankfurt	City	<input type="checkbox"/>		...
Berlin	City	<input type="checkbox"/>		...
Hamburg	City	<input type="checkbox"/>		...
Nuremberg	City	<input type="checkbox"/>		...
Dusseldorf	City	<input type="checkbox"/>		...
Freiburg	City	<input type="checkbox"/>		...
Bremen	City	<input type="checkbox"/>		...
Ingolstadt	City	<input type="checkbox"/>		...
Regensburg	City	<input type="checkbox"/>		...

Site Elements

- Site Element Name
- Site
- Site Element Type

Racks

- Rack Name
- Rack Type
- Site

Rack Elements

- Rack Element Name
- Rack Name
- Rack Element Type
- Orientation (front or back) (front = 1 or True, back = 0 or False)

Cable Connections

To be able to import several ports per cable connection, one line must be used per plug. Thus two lines are required for the cabling of a network socket port with a patch panel port.

Based on the name of the connection, an assignment of start port and destination port is implemented. The number is required if a port has several connection options, e.g. TERA wiring.

Entries that could not be inserted correctly are marked with a red X and have to be adjusted manually. With click on the *OK* button all connections are inserted.

- Connection Name (related ports are specified by the connection name)
- Cable Type
- Cable Color (specified by RGB value 255-255-255) (If the field is blank, the default color of the cable is used)
- Element (element to be wired)
- Port (port to be wired)
- Front (Front or Back) (Front = 1 or True, Rear = 0 or False)
- Number (Relevant for cabling with multiple connections. Specifies the position of the connection at the plug. If the plug has only one port, a "1" is always entered)
- Destination (specify at which end of the wiring this port is) (Start = 0 and End = 1)
Relevant if there are several plugs on one side of the connection, e.g. TERA cabling

	A	B	C	D	E	F	G	H
1	Connection Name	Cable Type	Cable Color	Element	Port	Front	Number	Destination
2	Tera-Switch-Patchpanel	Tera - 4 Pair	138-43-226	TERA Patchpanel	2	1	1	0
3	Tera-Switch-Patchpanel	Tera - 4 Pair	138-43-226	TERA Patchpanel	2	1	2	0
4	Tera-Switch-Patchpanel	Tera - 4 Pair	138-43-226	TERA Patchpanel	2	1	3	0
5	Tera-Switch-Patchpanel	Tera - 4 Pair	138-43-226	TERA Patchpanel	2	1	4	0
6	Tera-Switch-Patchpanel	Tera - 4 Pair	138-43-226	Switch	1	1	1	1
7	RJ45-Switch-Patchpanel	Cat 7		Switch	15	1	1	1
8	RJ45-Switch-Patchpanel	Cat 7		RJ45 Patchpanel	5	1	1	0
9	Tera-Patchpanel-Socket	Cat 7		TERA Patchpanel	2	0	1	1
10	Tera-Patchpanel-Socket	Cat 7		TERA Networksocket	1	0	1	0
11	RJ45-Patchpanel-Socket	Cat 7		RJ45 Patchpanel	5	0	1	1
12	RJ45-Patchpanel-Socket	Cat 7		RJ45 Networksocket	1	0	1	0
13	Tera-Networksocket-PC1	Tera - 2 Pair	255-64-64	TERA Networksocket	1	1	1	0
14	Tera-Networksocket-PC1	Tera - 2 Pair	255-64-64	TERA Networksocket	1	1	2	0
15	Tera-Networksocket-PC1	Tera - 2 Pair	255-64-64	PC - 1	Network	0	1	1
16	Tera-Networksocket-PC2	Tera - 2 Pair	255-64-64	TERA Networksocket	1	1	3	0
17	Tera-Networksocket-PC2	Tera - 2 Pair	255-64-64	TERA Networksocket	1	1	4	0
18	Tera-Networksocket-PC2	Tera - 2 Pair	255-64-64	PC - 2	Network	0	1	1
19	RJ45-Networksocket-PC3	Cat 6		RJ45 Networksocket	1	1	1	0
20	RJ45-Networksocket-PC3	Cat 6		PC - 3	Network	0	1	1
21								

Import Cable Connections

Import Data Delete

Name: Tera-Switch-Patchpanel

Cable Type: Tera - 4 Pair Cable Color: [Purple]

Plug:

ELEMENT	PORT	CABLE DIRECTION
TERA Patchpanel	2 - 1 - Front	<input type="checkbox"/>
TERA Patchpanel	2 - 2 - Front	<input type="checkbox"/>
TERA Patchpanel	2 - 3 - Front	<input type="checkbox"/>
TERA Patchpanel	2 - 4 - Front	<input type="checkbox"/>
Switch	1	<input checked="" type="checkbox"/>

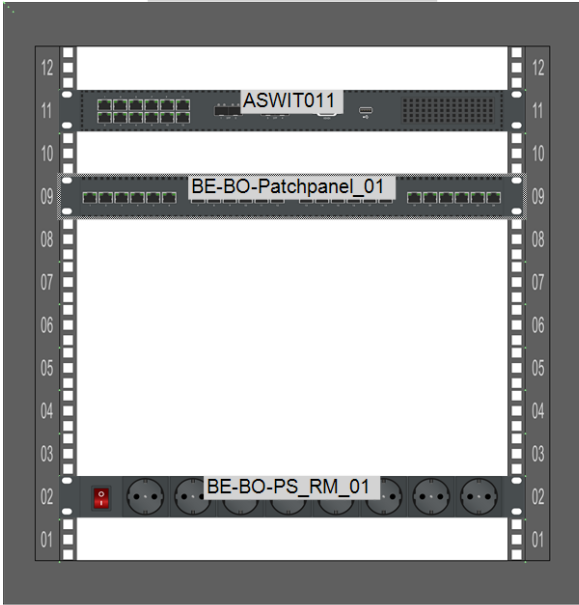
NAME	COLOR
RJ45-Netzwerkdose-PC3	[Orange]
RJ45-Patchpanel-Dose	[Orange]
RJ45-Switch-Patchpanel	[Orange]
Tera-Netzwerkdose-PC1	[Red]
Tera-Netzwerkdose-PC2	[Red]
Tera-Patchpanel-Dose	[Orange]
Tera-Switch-Patchpanel	[Purple]

OK Cancel

Cable Connections Export

With the help of the *Export Plugs* function it is possible to export a finished CSV file with the cabling of the system. The Export function is available for all elements where connections can be documented.

BE-BO-Rack_01 - Front



ASWIT011

BE-BO-Patchpanel_01

BE-BO-PS_RM_01

< Back to Overview

Plug

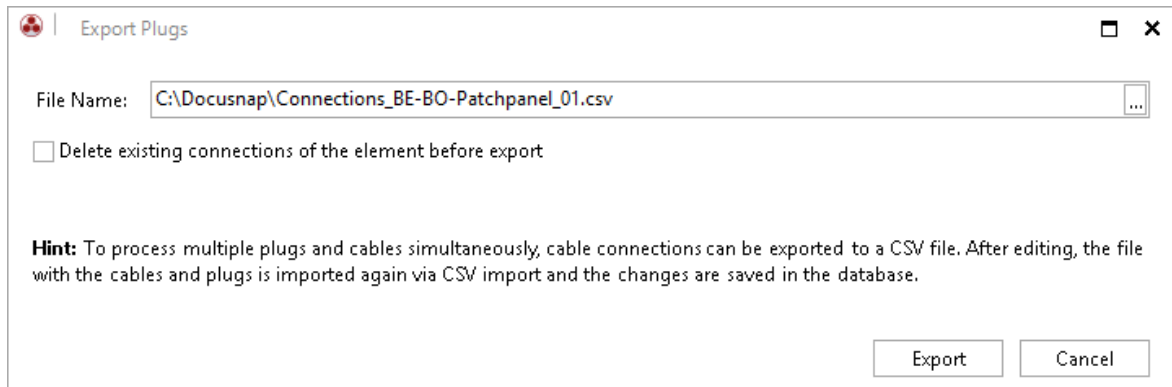
☐ Show Description

Adjust Cable Connection Export Plugs Switch Assignment

PLUG	NR.	GROUP	WIRED WITH
1	1		ASWIT011 - 1
2	2		BE-BO-GF-1/2 - 2
3	3		BE-BO-GF-3/4 - 1
4	4		BE-BO-GF-3/4 - 2
5	5		BE-BO-GF-5/6 - 1; ASWIT011 - 2
6	6		BE-BO-GF-5/6 - 2
7	7		BE-BO-GF-7/8 - 1
8	8		BE-BO-GF-7/8 - 2
9	9		
10	10		
11	11		
12	12		
13	13		
14	14		
15	15		
16	16		
17	17		
18	18		
19	19		
20	20		
21	21		
22	22		
23	23		
24	24		



The existing connections can be deleted during export. This way the connections can be edited in the exported CSV file and then imported again.



The 'Export Plugs' dialog box features a title bar with a red icon and standard window controls. It contains a 'File Name' field with the text 'C:\Docusnap\Connections_BE-BO-Patchpanel_01.csv' and a browse button. Below this is an unchecked checkbox labeled 'Delete existing connections of the element before export'. A 'Hint' section provides instructions on using CSV files for multiple plugs and cables. At the bottom right are 'Export' and 'Cancel' buttons.

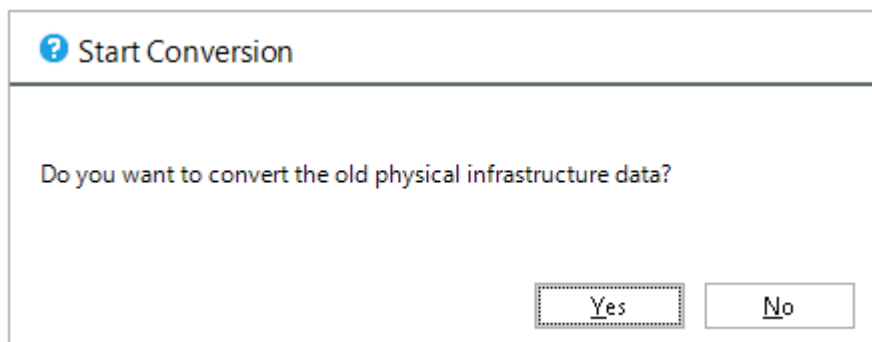


If the checkbox is activated, these connections are deleted from the database. If the CSV file is subsequently lost, the connections must be created again.

The exported CSV file can then be imported as usual using the *Import Cable Connections* button.

9.11 Migration Wizard

In order to migrate inventory data of the physical infrastructure from older Docusnap versions a migration assistant is available. The wizard is started as soon as the editor is opened.



The 'Start Conversion' dialog box has a title bar with a question mark icon. The main text asks 'Do you want to convert the old physical infrastructure data?'. At the bottom are 'Yes' and 'No' buttons.

The request for migration is made only once and for all companies in the database. If the conversion is rejected, the dialog does not appear again.

The migration of the existing physical infrastructure is only partially automated, since information was not defined in this level of detail in the previous physical infrastructure. For example, patch panels were connected to a switch without detailed port information. The assignments within a rack cannot be transferred either. The corresponding elements are placed in the rack, but must be moved to the desired position by the user.

The previous tables and columns and their contents are retained after the migration.

- tRacks
- tNetworkSocket
- tNetworkSocketPort
- tHosts.RackID
- tHosts.RackStartHeightUnits
- tHosts.RackNumberOfHeightUnits

Transfer Data

The following steps are performed in the migration wizard:

Racks are converted.

- Name and site will be filled in automatically.
- A rack type must be manually assigned to the existing rack.

Convert

1 Information 2 **Racks** 3 Systems 4 Network Socket 5-6 Steps 5-6

Convert Racks

Add Rack Type

NAME	SITE	RACK TYPE	OLD RACK HEIGHT
Rack One Munich	Server-Room		10

Rack - 12 RU
Rack - 15 RU
Rack - 18 RU
Rack - 24 RU
Rack - 26 RU
Rack - 38 RU
Rack - 42 RU
Rack - 47 RU
Rack - 9 RU

Next Cancel

Systems and assets are converted

- System name, rack and site are assigned automatically
- You may have to make manual adjustments to the system type.

- Systems assigned to a rack must be manually positioned in the rack.
An automatic placement on the corresponding height units does not take place!
- Multiple selection of the system type is possible via the *Assign System Type* button

Convert

1 Information 2 Racks 3 **Systems** 4 Network Socket ... Steps 5-6

Convert Systems & Assets

Add System Types Assign System Type

	NAME	SYSTEM TYPE	ASSIGNED RACK	SITE	OLD ELEMENT HEIGHT
	TKNVT002	Server -1 RU - 4 Ports - 1 Power Plug (HE 1; 1 HDMI; 1 Power;...	Rack One Munich	Server-Room	
	TKNP0004	Server -1 RU - 4 Ports - 1 Power Plug (HE 1; 1 HDMI; 1 Power;...	Rack One Munich	Server-Room	
	SESX12	Server -1 RU - 4 Ports - 1 Power Plug (HE 1; 1 HDMI; 1 Power;...	Rack One Munich	Server-Room	
	SESX11	Server -1 RU - 4 Ports - 1 Power Plug (HE 1; 1 HDMI; 1 Power;...	Rack One Munich	Server-Room	
	SESX10	Server -1 RU - 4 Ports - 1 Power Plug (HE 1; 1 HDMI; 1 Power;...	Rack One Munich	Server-Room	1,00
	ASWIT005	Server -1 RU - 4 Ports - 1 Power Plug (HE 1; 1 HDMI; 1 Power;...	Rack One Munich	Server-Room	
	ASWIT003	Server -1 RU - 4 Ports - 1 Power Plug (HE 1; 1 HDMI; 1 Power;...	Rack One Munich	Server-Room	
	ASWIT001	Server -1 RU - 4 Ports - 1 Power Plug (HE 1; 1 HDMI; 1 Power;...	Rack One Munich	Server-Room	

Next Cancel

Network sockets are converted

- The name is transferred.
- The network socket type is determined automatically if possible. A manual correction may be necessary here.
- The site must be assigned if necessary.

Patch panels are converted

- Name and site are automatically transferred if possible.
- A patch panel type must be entered manually.
- Patch panels assigned to racks are only assigned to the corresponding rack. An automatic placement on the corresponding height units does not take place.

Convert

...

3

4

5

6

Steps 1-2

Systems

Network Socket

Patch Panel

Summary

Convert Patch Panel

Add Patch Panel Type

	NAME	PATCH PANEL TYPE	SITE	ASSIGNED RACK	OLD NUMBER
🔗	PP1	Patchpanel - 1 RU - 3x8 Ports (HE 1;...	Server-Room	Rack One Munich	12

◀

▶

Next

Cancel



Part



10 Diagrams

The Diagrams module in Docusnap allows you to map the relations between the components of your IT environment. This enhances the transparency of your network organization.

Diagrams may be modeled both at an organizational and at a technical level.

At the organizational level, you can display the interrelations of servers, workstations, etc. This allows you, for example, to identify the systems that would be affected by the failure of a particular component or to set up suitable maintenance schedules for individual components.

On the communications level, diagrams help you to determine the various connection types and the protocol used for each connection.

10.1 Create Diagrams

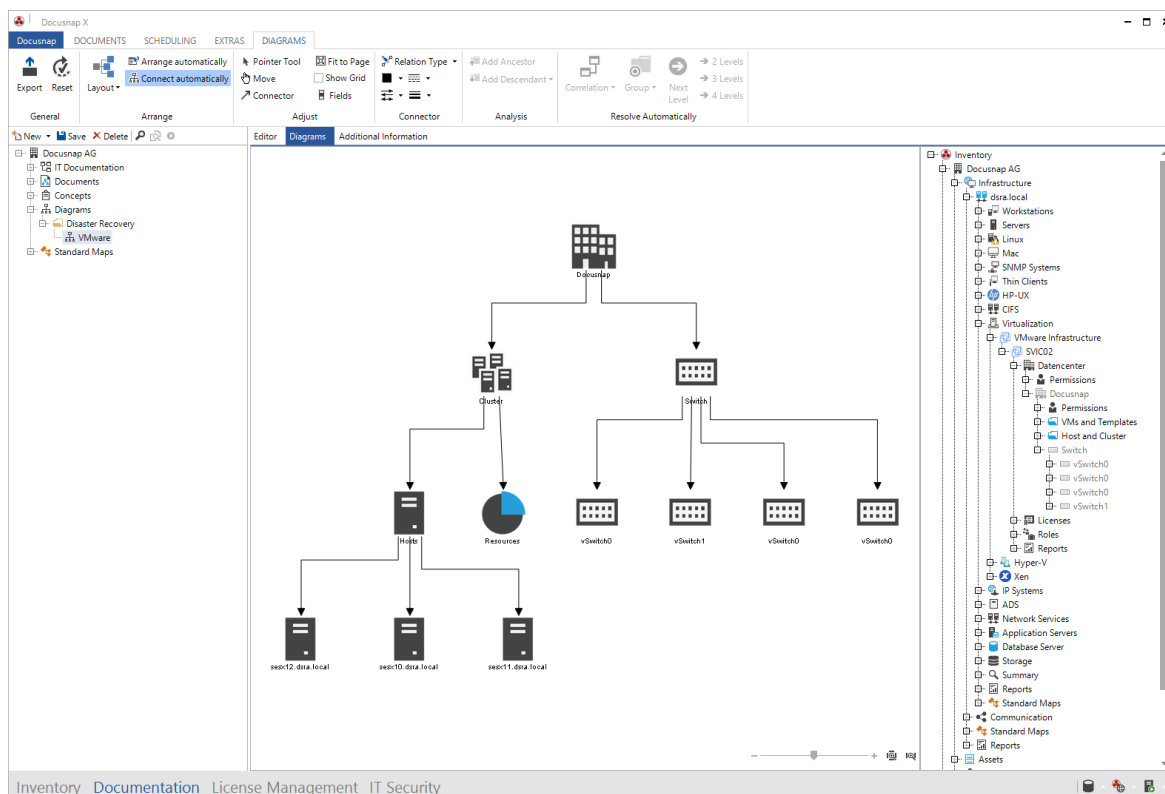
To create a new diagram, navigate to the *Documentation* tree. First, select the *Diagram* heading in the tree view, then create a new folder by clicking the *New* button above the tree and then you can create a new diagram. Specify a name for the folder and the diagram. Now you can create a diagram on the *Diagrams* tab.

The right pane shows the *Inventory* tree. It contains the data from the most recent network inventories.

Select a component and drag it to the *Diagrams* tab while holding down the left mouse button.



The preview icon (100x100 px) of the respective object is used as the icon. If objects are created via customizing, it is recommended to also use icons with the size 100x100 px, so that all icons have a uniform size.



Ribbon

The *Diagrams* ribbon allows you to define additional settings for creating the diagrams.

Use the *New*, *Save* and *Delete* buttons above the tree view to create or delete new diagram or save changes made to existing diagrams.

General: You can export the current diagram to a Visio file by clicking the *Export* button. Clicking the *Reset* button will load the last saved version of the diagram again.

Arrange: Use the *Arrange* group on the ribbon to select an algorithm for automatic arrangement of the objects.

With the *Connect automatically* button enabled, each new component will be connected to the most recently selected component.

Adjust: The *Pointer Tool* allows you to select individual components by a mouse click.

To move the entire diagram, click the *Move* button.

If the *Connector* button has been selected, you can create a *Connector* using the mouse. Click a component and drag the mouse (while holding down the mouse button) to the second component. This will connect the two components.

Clicking the *Fit to Page* button resizes the diagram so that it fits the page.

Connector: The desired type and design for a connector can be selected from the *Connector* group.

Analyse: Use the *Add Ancestor* and *Add Descendant* to add the hierarchical ancestor and descendants of the selected object.

Resolve Automatically: By clicking the *Diagram* button you can add the *IT Correlations* of the selected object.

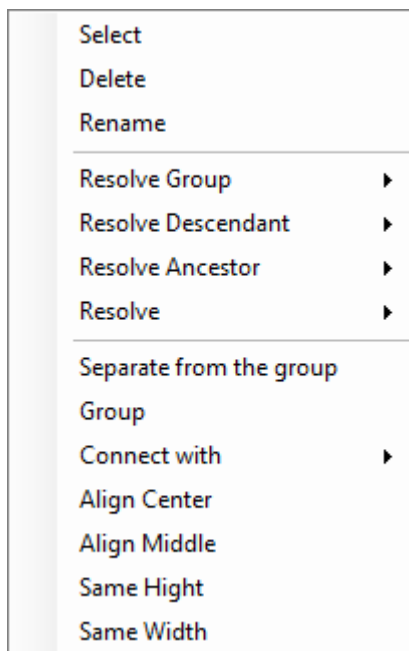
By clicking the *Group* button you can add groups of *IT Correlations* of the selected object.

By clicking the *Next Level* button or the *2 - 4 Levels* button you can choose how many levels of the *IT Correlations* should be added.

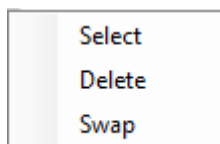
Context Menu

A context menu is available when you right-click the components and connectors.

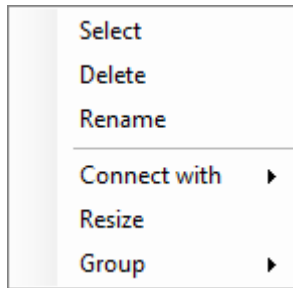
This menu contains options to delete the current object or to connect it with other objects. When selecting multiple objects, you can align them horizontally or vertically or set them to the same height or width. Additionally IT Correlations, ancestors and descendants can be added.



The connectors can be deleted from the context menu. What is more, you can swap the starting and ending points or select a different starting or ending point.



Using the context menu options, it is also possible to rearrange groups or resize them.



Properties

Once a connector has been selected, the *Properties* entry screen appears. Here, you can specify additional information about the selected connector. The properties will be displayed along with the connectors. You can select the properties to be displayed from the *Fields* dialog. Optionally, you can add to the properties by editing the *tRelLink* table. Adding columns to the databases and entry screens is described in the Configuration Manual.

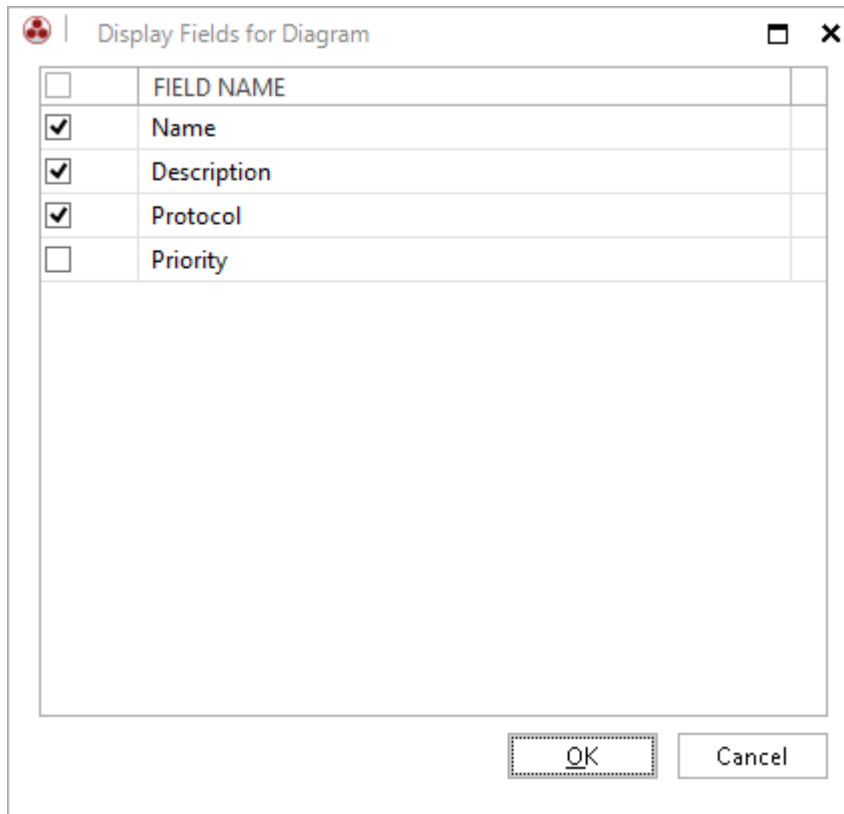
IT Correlations

When creating the relations objects of IT Correlations can also be added. Unlike *Diagrams* which represent the relationship between two given objects, the *IT Correlations* are defined between two types of objects. The context menu of the added objects lists under *Resolve Relation* entry all IT Correlations and by clicking on it the desired one can be resolved. IT Correlations can also be added by clicking the *Relation* button in the ribbon. Groups can also be added via the context menu and the ribbon.

Additionally the hierarchical ancestors and descendants can be added via the context menu. Click on the entry *Resolve* to select how many levels of IT Correlations should be resolved.

Fields

Each connection has properties, such as a name, a description, a priority, etc. that you can select for display in the diagram. Click the *Fields* button in the *Diagrams* ribbon to open the dialog. For each diagram, you can select the fields to be displayed from the *Display Fields for Diagram* dialog.



Deleted entries

If objects are deleted that have already been inserted into a diagram, they are not deleted from the diagram, but marked with (deleted).

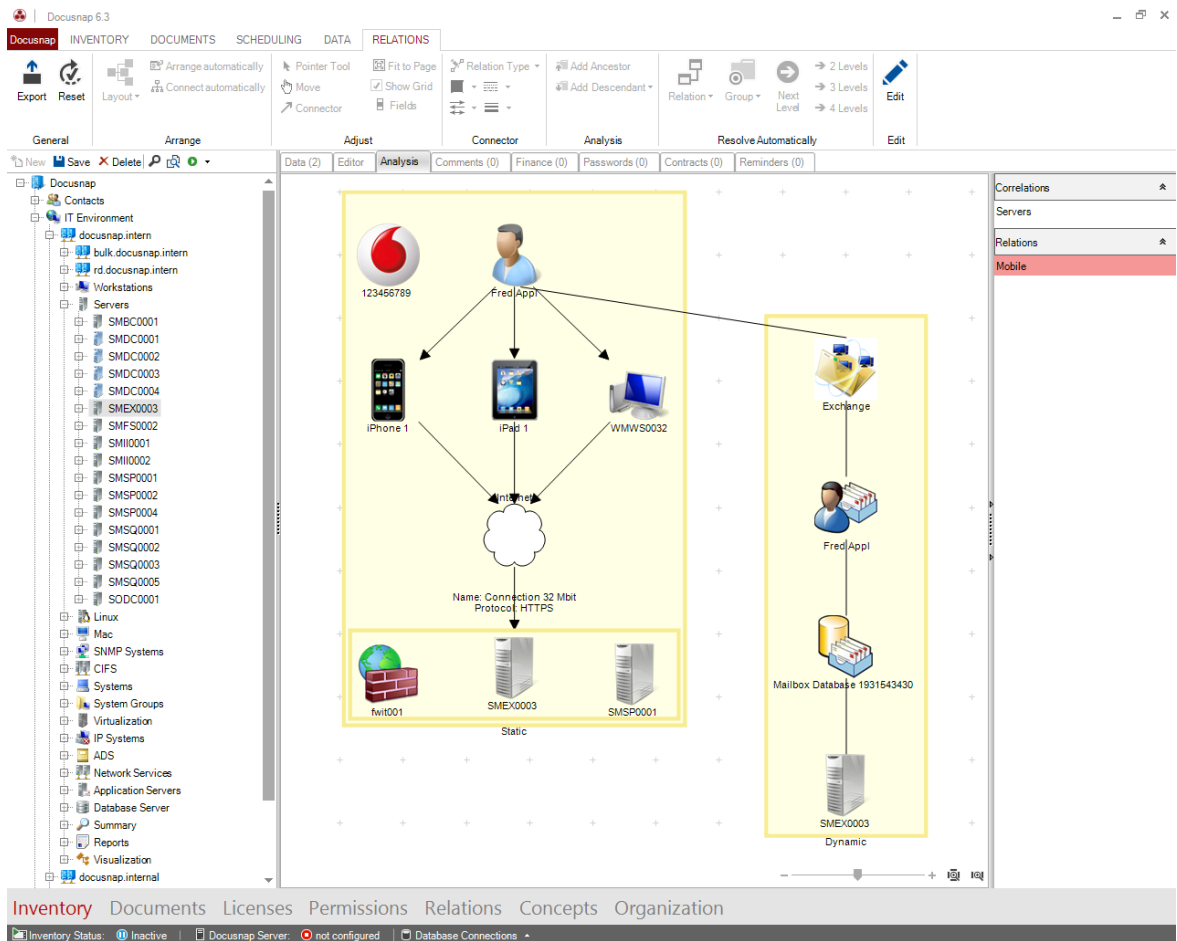


Some objects can be moved in the data explorer. For example, systems that are moved to another domain, systems that are changed from offline host to Windows systems, or IT assets that are placed in a different folder.

By moving the object, it can no longer be linked with the diagram. Therefore, it will be marked as (deleted). In this case, the object would have to be deleted from the diagram and then added to the diagram again from the new position in the tree.

Opening relations from other tree views

The *Analysis* tab is displayed for each object you select in the Data Explorer. If the selected object is used in a diagram, that diagram will be displayed on this tab. In the *Analysis* tab the diagram can be exported. To edit the diagram click the *Edit* button to open it in the *Diagrams* tab.



Part

XI

11 Concept

The Concepts module in Docusnap allows you to create concepts by using the whole set of retrieved data, associated documentation, and relations so that there is no need for an additional word processor.

What is more, the inventoried data and documentation are always updated to keep the concept current at any time. It is also possible to insert variables, such as the name of a workstation or the last inventory data, into the various text areas.

Once the concept is complete, it can be exported to the desired format (.docx, .pdf, .html, or .rtf) and thus becomes available for further use.

The creation and export of the document can be automated using the *Scheduling* feature, allowing timed updates of the document.

Ribbon

Creating a Concept

Composition

Versioning

Backups

Templates

Designs

Styles

Export and Scheduling

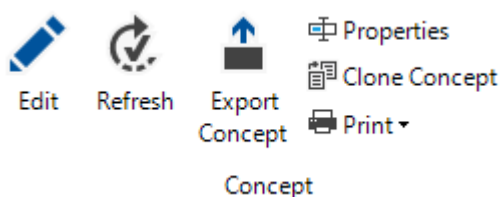
Assignment

Store / Load Concept

11.1 Menu Ribbon

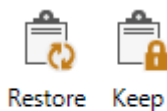
The *Concepts* ribbon displays when you have selected Concepts in the *Documentation* tree. Using this ribbon, you can edit and change concepts.

Concept



- **Edit:** A click on the *Edit* button launches the Concept Editor where you can edit the selected concept.
- **Refresh:** Use the *Refresh* button to update the concept. This reloads the data for data elements, reports, etc. and recreates the table of contents.
- **Export Concept:** Using the *Export Concept* button, you can export your concept to Word, PDF, or other formats.
- **Properties:** Click on the *Properties* button to open the *Concept Properties* Dialog. In this dialog the name of the concept and the author can be changed. In addition, the date of change and creation as well as the size are displayed. A description of the concept can also be added.
- **Clone Concept:** Click on the button *Clone Concept* to copy the selected concept. The name can then be changed in the *Concept Properties* dialog.
- **Print:** By clicking the *Print* button, you can print the selected concept.

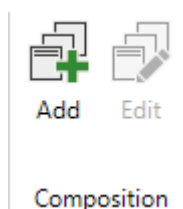
Versions/Backup



Versions/Backup

- **Restore:** Clicking the *Restore* button restores the selected version or the selected backup as a concept and can be edited. The previous concept remains as the last backup.
- **Keep:** Since only a certain number of versions and backups of a document can be stored, you can click this button to select and keep a certain version or backup. This prevents the current document version from deletion.

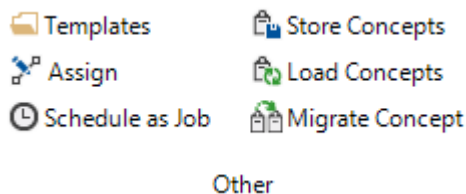
Composition



A composition is a document created from multiple concepts. If the concepts of the composition are changed, the composition document also changes. The export of compositions can be planned in a time-controlled manner like the export of the concepts.

- Add: If the node *Concepts* or a concept folder in the tree has been selected, the button *Add* can be used to open the *Manage IT Concept Composition* dialog.
- Edit: If a composition has been selected, the dialog to edit a composition can be opened via the *Edit* button.

Other



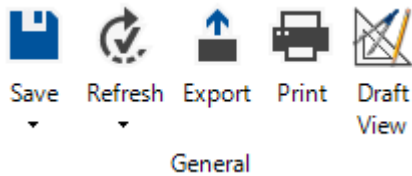
- Templates: Clicking the *Templates* button opens the *Concept Templates* dialog.
- [Assign](#): Clicking this button opens the *Assign Concept* dialog which allows you to insert the desired concept into other tree views. It is also possible to add a *concept folder* to a node in one of the other trees.
- [Schedule as Job](#): Clicking this button opens a wizard which allows you to schedule creation of a concept for a certain date and time.
- Store Concepts / Load Concepts: Concepts, versions, backups and templates can be saved as a file. These can then be imported into other companies or other databases.
- Migrate Concept: The concepts that are in the defined concept path are automatically moved to the database. If other IT concepts are saved in a different folder, they can be stored in the database via the *Migrate IT Concepts* dialog.

Text Editor



General

- Save: After clicking the *Save* button, you can decide whether to simply save the concept, to save it as a new version, or to save it as a template.
- Refresh: Use the *Refresh* button to update the concept. You can specify whether you would like to refresh the entire concept or just the document outline. A refresh of the entire document reloads the data for data elements, reports, etc. and recreates the table of contents. When you just refresh the document outline, the system recreates the table of contents and reloads the entries in the navigation pane.
- Export: Using the *Export* button, you can export your concept to Word, PDF, or other formats.
- Print: By clicking the *Print* button, you can print the open concept.

- **Draft View:** By enabling the draft view elements such as reports, plans, relationships, etc. are not completely displayed, only a placeholder is shown at the location at which they were inserted. Thereby the concept has not as many pages and is easier to process.



Edit

- **Paste:** Using the *Paste* button, you can insert elements from the clipboard into the text area.
- **Cut:** This button allows you to cut selected text elements.
- **Copy:** This button allows you to copy selected text elements to the clipboard.
- **Hierarchical structure:** By clicking the arrows, you can change the hierarchical level and order of the headings in your concept.
- **Find:** The  button allows you to find particular parts in the entire text quickly and easily.
- **Replace:** The  button allows you to find and replace certain text parts.



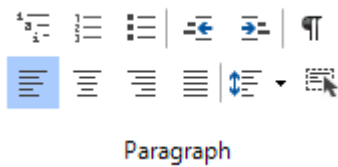
Formatting

This group contains buttons that can be used to change the font, color, and typeface of your text.



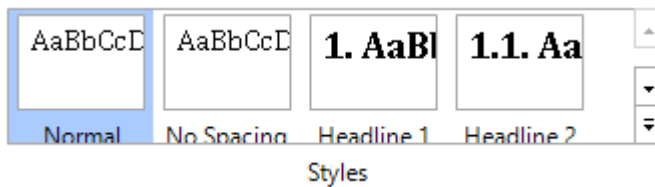
Paragraph

The buttons in the *Paragraph* group allow you to adjust the alignment and formatting of the paragraphs in your text area.



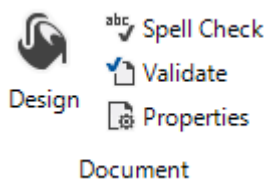
Styles

For text formatting, [Styles](#) are available which allow you to edit the text in your entire document in a centralized way. These styles are also needed when creating the table of contents.



Document

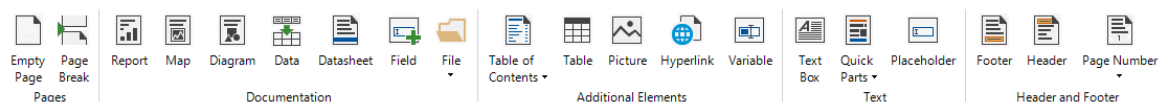
- **Design:** Clicking the *Design* button opens the *Designs and Styles* dialog. This dialog allows you to individually define the design of your concept.
- **Spell Check:** Click the *Spell Check* button to start the integrated spell checker.
- **Validate:** By clicking the *Validate* button, you can check the concept for validity. Any errors found will be displayed in the error list. An error is present if, e.g., an inserted diagram was deleted or if a report does not exist any longer.
- **Properties:** Click the *Properties* button to open a window which lists the properties of your concept. Here, the title and author of the concepts may be changed. You can also enter an additional description. The properties also include additional information such as the date when the concept was last modified.



Insert

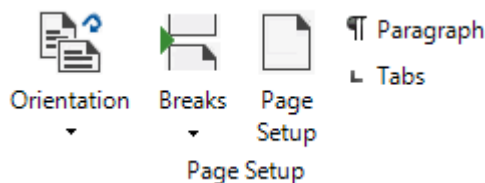
Use the Insert ribbon to insert different [elements](#) into your concept.

- **Header and Footer:** Use the Header or Footer button to open an additional tab where you can specify your header and footer settings.



Page Layout

- Orientation: The options below this button can be used to specify portrait or landscape format.
- Breaks: Click the *Breaks* button to insert a page break. Two different types of page breaks, i.e. *Continuous* and *Next Page* can be selected.
- Page Setup: Click the *Page Setup* button to adjust the margins, paper size, header and footer, columns, and borders of your document.
- Paragraph: This button opens a dialog that allows you to change the formatting, indents, frame, and page breaks of your document.
- Tabs: This button opens the *Tabs* dialog where you can set and change various indents.



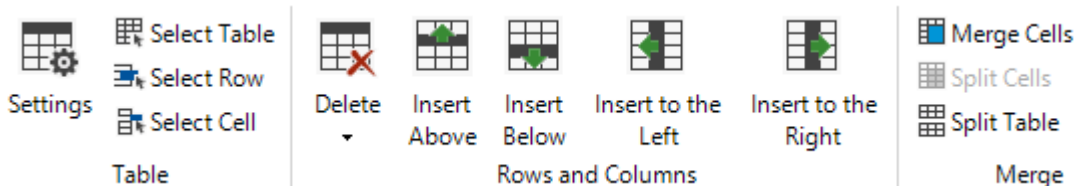
Data Elements

If you highlight a certain element such as a map, a diagram, or a data element, an additional ribbon displays.

- Settings: When you click the Settings button, you can specify further settings for the selected element.
- Refresh: For elements such as *data elements*, *maps*, or *diagrams*, you can click the *Refresh* button to load their current version.
- Delete: Click the *Delete* button to delete the selected element.
- Draft View: By enabling the draft view the selected element is not completely displayed, only a placeholder is shown at the location at which it was inserted.



Table Tools



The Table Tools ribbon display when you insert a new table or select an existing table.

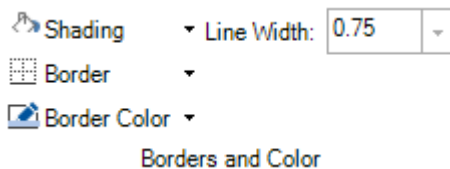
Table Styles

Various styles are available for tables. Click the little arrows next to the buttons and select the desired basic shading for your table.



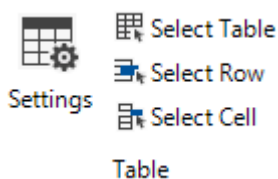
Borders and Color

In the *Borders and Color* group, you can select the shading, border color, border, and line width for the selected part of the table.



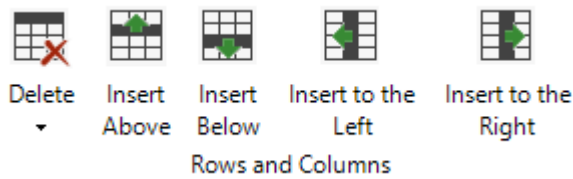
Table

- Settings: Here, you can change table properties such as the distance from text or the cell height.
- Select Table: Click the *Select Table* button to select the entire table.
- Select Row; Select Cell: These two buttons can be used to select the row or cell where the cursor is currently placed.



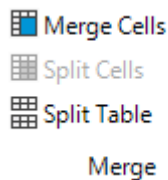
Rows and Columns

- Delete Table; Delete Columns; Delete Rows: These options can be used to delete the entire table, selected columns, or selected rows. These options display when you click the *Delete* button.
- Insert Above; Insert Below; Insert to the Left; Insert to the Right: These four buttons can be used to insert more columns and lines into an existing table.

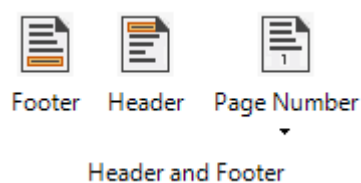


Merge

- Merge Cells: Click this button to merge the selected cells into one.
- Split Cells: Clicking this button allows you to split the highlighted merged cell again.
- Split Table: Click this button to split the existing table into two.



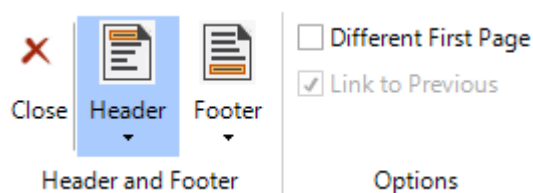
Header and Footer



This ribbon allows you to create headers and footers.

Header and Footer

- Close: Click this button to end the editing of your headers and footers. You are taken back to the *General* ribbon.
- Header; Footer: Use these buttons to enable, disable and modify your headers and footers.
- Different First Page: Tick this checkbox to create a special header and footer for the first page of your document.
- Link to Previous: If you enable the *Link to Previous* feature, a document with multiple sections will always use the header and / or footer of the previous section.



Position

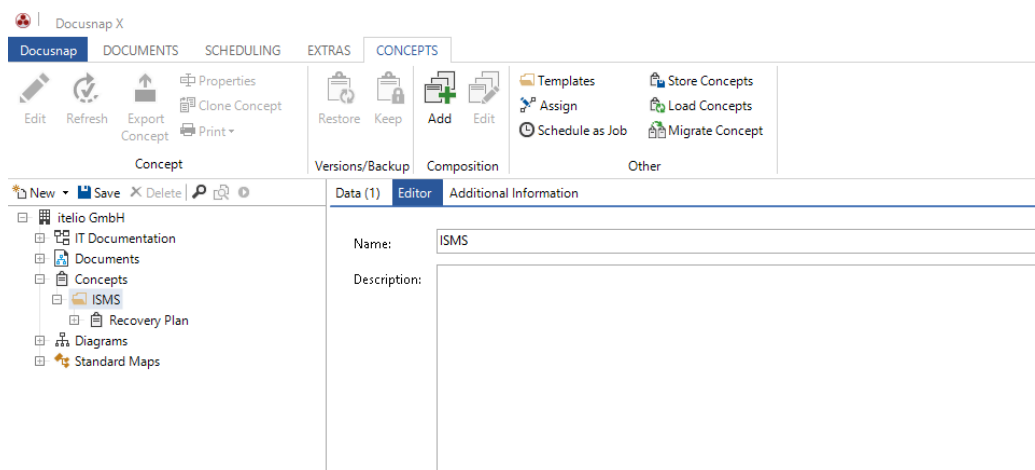
In the *Position* group, you can change the position of your headers and / or footers.



11.2 Create Concept

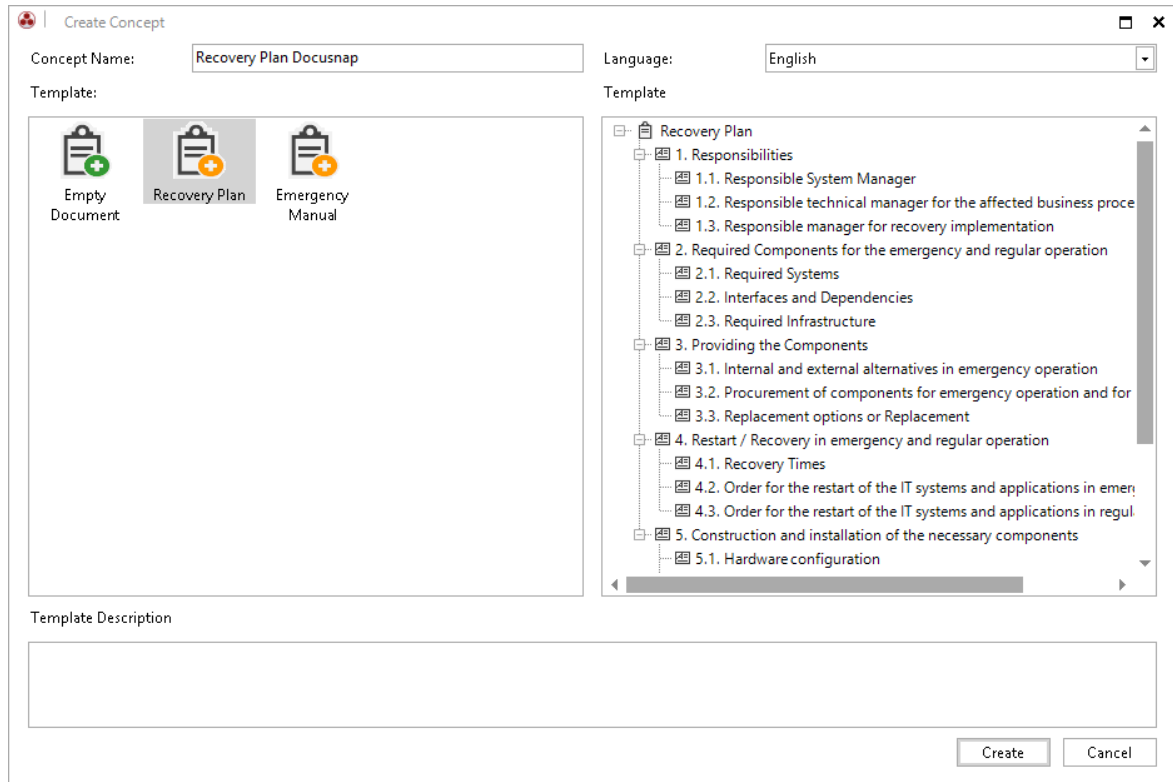
To create a new concept, change to the *Documents* tree and select the *Concept* heading. You can either create a directory where the concepts will be stored or integrate your concepts directly below the *Concept* heading.

To create a new directory, select the *Concept* heading in the tree view, click the *New* button and select *Concept Directory*. After naming the directory, you can save it so that it will be displayed in the *Concept* explorer. You can also enter an additional description.



To create a new concept, you must either select the *Concept* heading or a directory where the document will reside after its creation. Then, click the *New* button and select *Create Concept*.

This opens the *Create Concept* dialog where you can either create an empty document or use a template to create your new document. Enter a name for the concept and click the *Create* button. The concept then opens automatically in the *Concept Editor*.



Concepts are created and managed in Docusnap. For editing concepts, the [Concept Editor](#) is available.

11.2.1 General

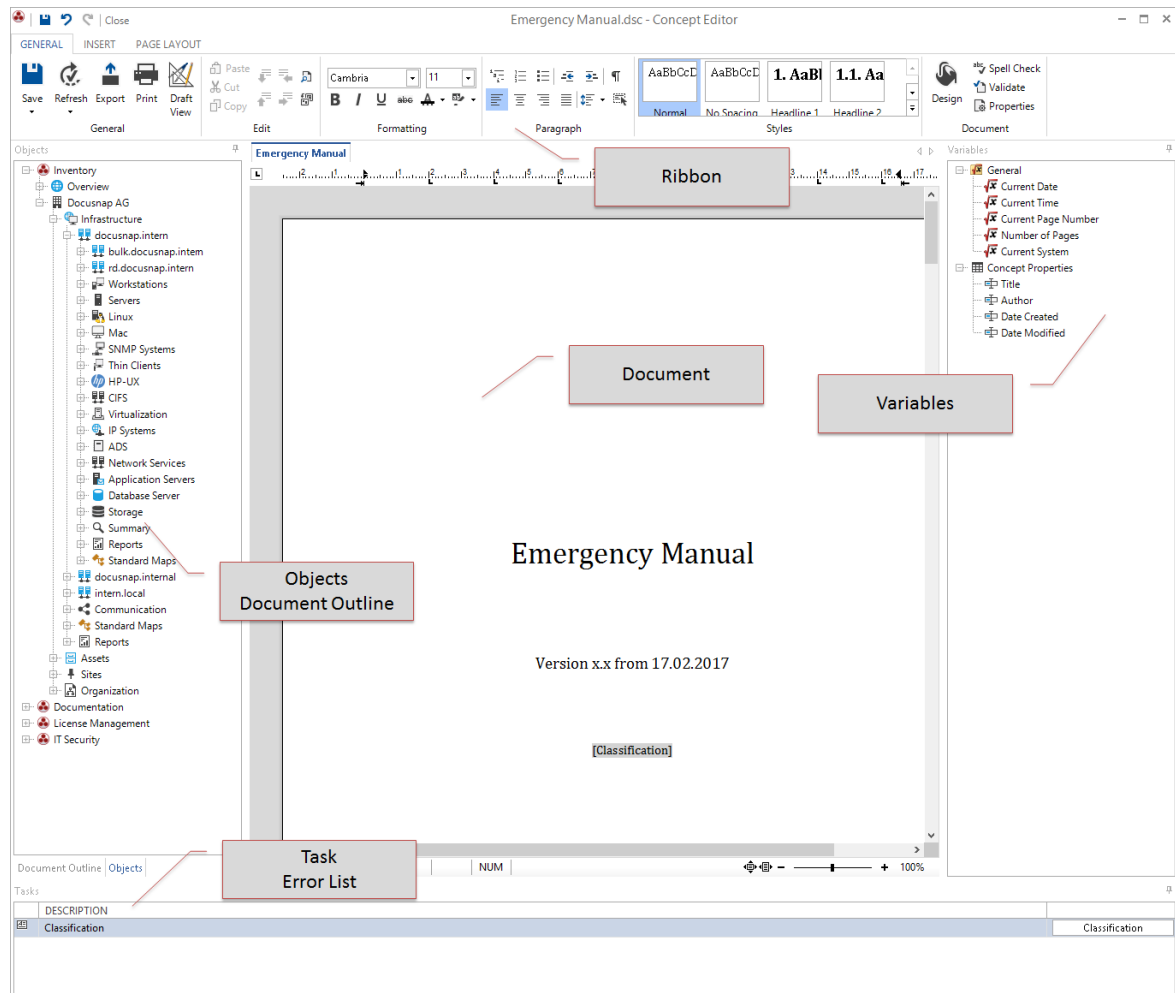
When creating the concept, the files are stored in the database. This allows all users connected to this database to work with the same concepts. All concepts of the database are displayed in the Explorer documentation.

When you select a concept in the Explorer, the *Concepts* ribbon is displayed. Clicking the *Edit* button opens the concept in the *Concept Editor* where it can be edited.

The various elements can be inserted either through the buttons located on the *Insert* ribbon or per drag & drop them from the object tree. For some elements such as maps, overviews, or data, further settings can be selected. To access the settings, either click the *Settings* button, select *Edit* from the context menu of the respective element, or double-click the element. The *Settings* button is located in an additional ribbon which is displayed as soon as you select the element in the document.

11.2.2 Concept Editor

For creating and editing concepts, the *Concept Editor* is available. The Concept Editor opens automatically when you create a new concept or when you open an existing concept for editing.



Ribbons

The [Ribbons](#) allow you to define the settings for formatting, content, and view, etc. of your concept.

Document

Use the document area to create your concept. In this area, you can enter the text and drag all elements such as reports, data elements, etc. there.

Objects

The *Objects* window displays all Explorers from the various modules. From this area, you can drag documents, reports, data elements, etc. and drop them into your concept.

Document Outline

The *Document Outline* window lists the headings to which one of the *Headline* styles is assigned. By clicking on a heading here, you can jump to the corresponding section in your document. This way, it is easier to navigate in your document, especially if it is large.

Variables

The *Variables* window provides variables you can insert into your concept. The variables can also be inserted by clicking the *Variable* button from the *Insert* ribbon.

Tasks

If [Placeholders](#) were defined for a document, a description of each placeholder will be displayed in the *Tasks* window. Click the respective button in the *Tasks* window to open the selection window for data which is available for this placeholder. Once you have selected the data, it replaces the placeholder.

Error List

By clicking the *Validate* button, you can check the concept for validity. Any errors found will be displayed in the error list. An error is present if, e.g., an inserted diagram was deleted or if a report does not exist any longer.

Layout

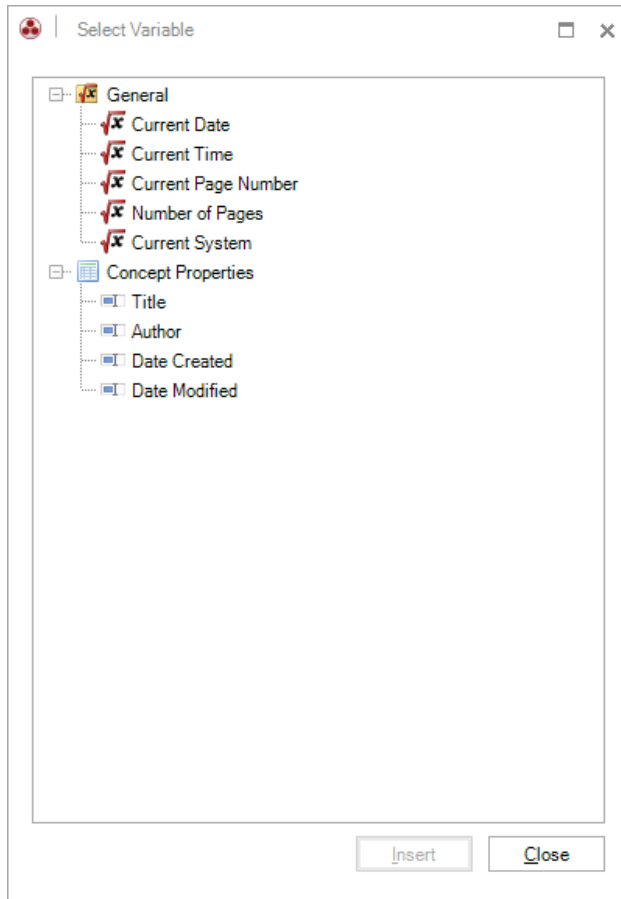
The windows can be arranged as desired by dragging and dropping. The position of each window is saved locally and will be remembered each time you open the Concept Editor.

11.2.3 Text

The text you enter can be edited the same way as in other word processors. The buttons on the *Insert* ribbon allow you to embed additional tables, variables, headers and footers, or hyperlinks.

Variables

It is possible to use variables in your text and place information such as the date and time, page numbers, but also information about the concept such as the author or the creation date in your concept. Clicking the *Variable* button on the *Insert* ribbon opens a dialog where you can select the desired variable.



Alternatively, variables may also be dragged from the *Variables* window on the right-hand side of the Concept Editor and dropped onto the document.

Header and Footer

You can also add headers and footers to your concept. Use the *Header* and *Footer* buttons to open the additional *Header and Footer* ribbon.

Clicking the *Header* button opens a header area in the document where you can enter the desired data. Proceed the same way for creating footers. To format your entries, use the existing ribbons.

By enabling the *Different First Page* option, a different header and/or footer can be created for the first page of the concept. If section breaks are inserted, the headers and footers on the first page of each section can be designed differently.

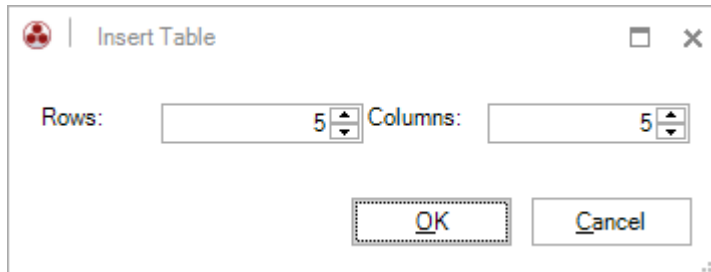
If a concept has multiple sections, you can enable the *Link to Previous* checkbox to use the header and/or footer from the previous section for the current header and/or footer.

The fields in the *Position* group can be used to change the header or footer position.

When you have completed the header and/or footer, you can close the ribbon by clicking the *Close* button and continue working in the text area.

Inserting tables

It is possible to insert tables into your concept. To do so, click the *Table* button. The *Insert Table* dialog opens.



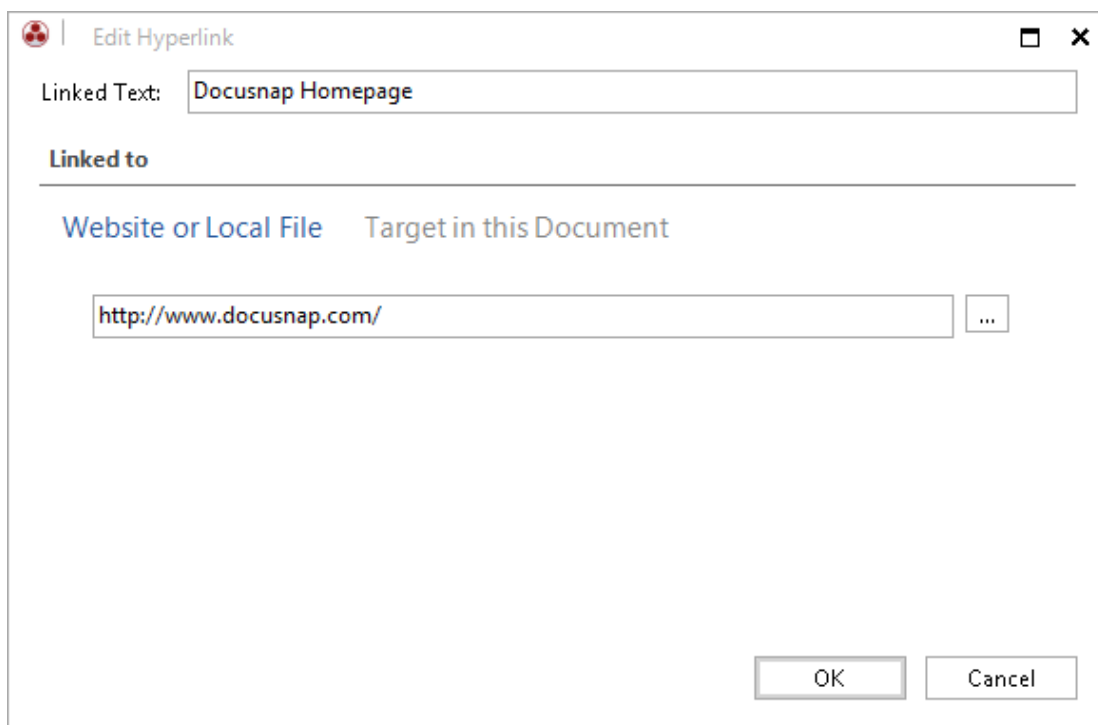
Here, you can specify the number of rows and columns for the table. Once you have created the table, the *Table Tools* ribbon becomes available to edit it.

Other buttons to modify the table such as options to insert columns or rows or to delete columns, rows or the entire table can also be found in the [Table Tools](#) ribbon.

Inserting Hyperlinks

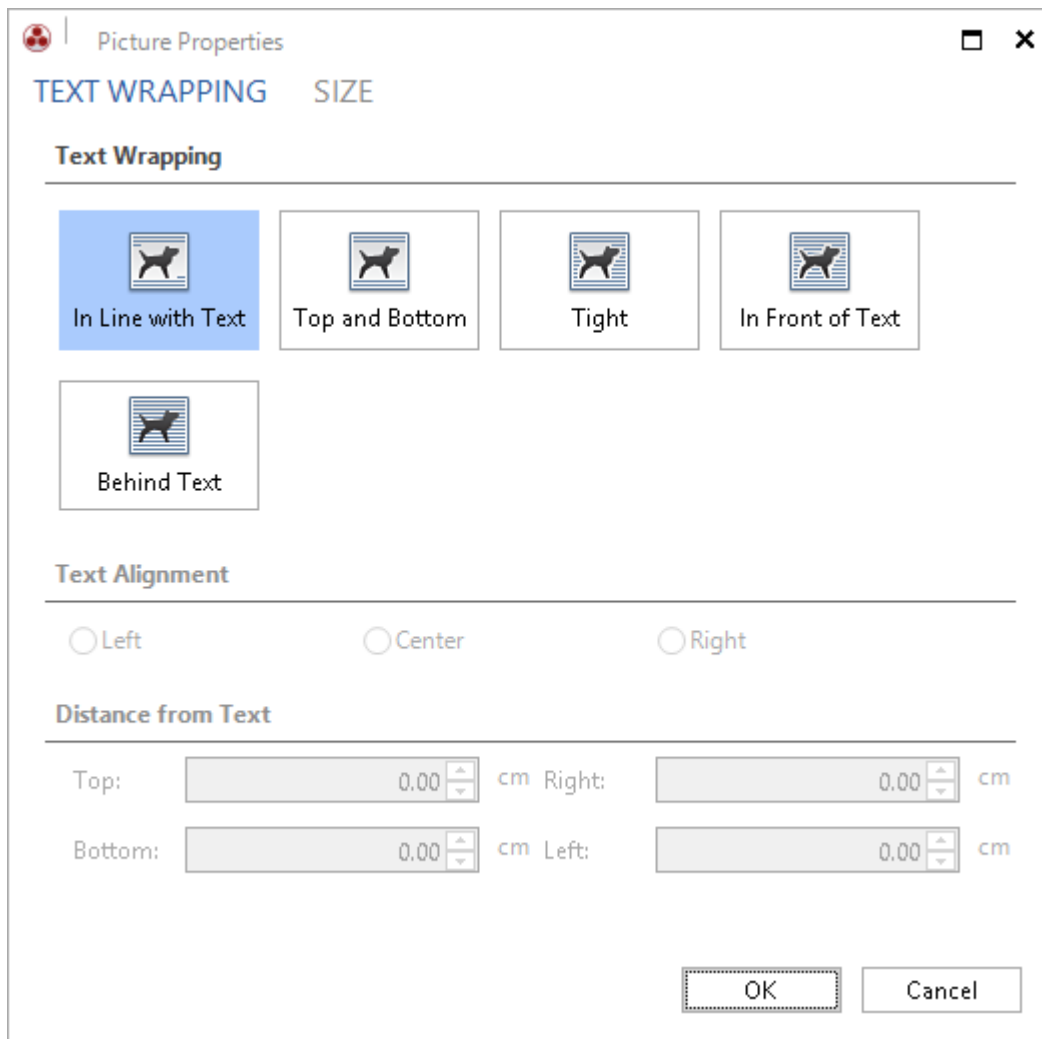
Click the *Hyperlink* button to open the *Edit Hyperlink* dialog. In the uppermost field, enter the text to be linked. On the *Website or Local File* tab, you can either enter a URL or select a locally saved file. On the *Target in this Document* tab, you can select a heading from the current concept to be linked.

After creating the hyperlink, you can use the *Settings* option from the context menu of the hyperlink to open the *Edit Hyperlink* dialog.



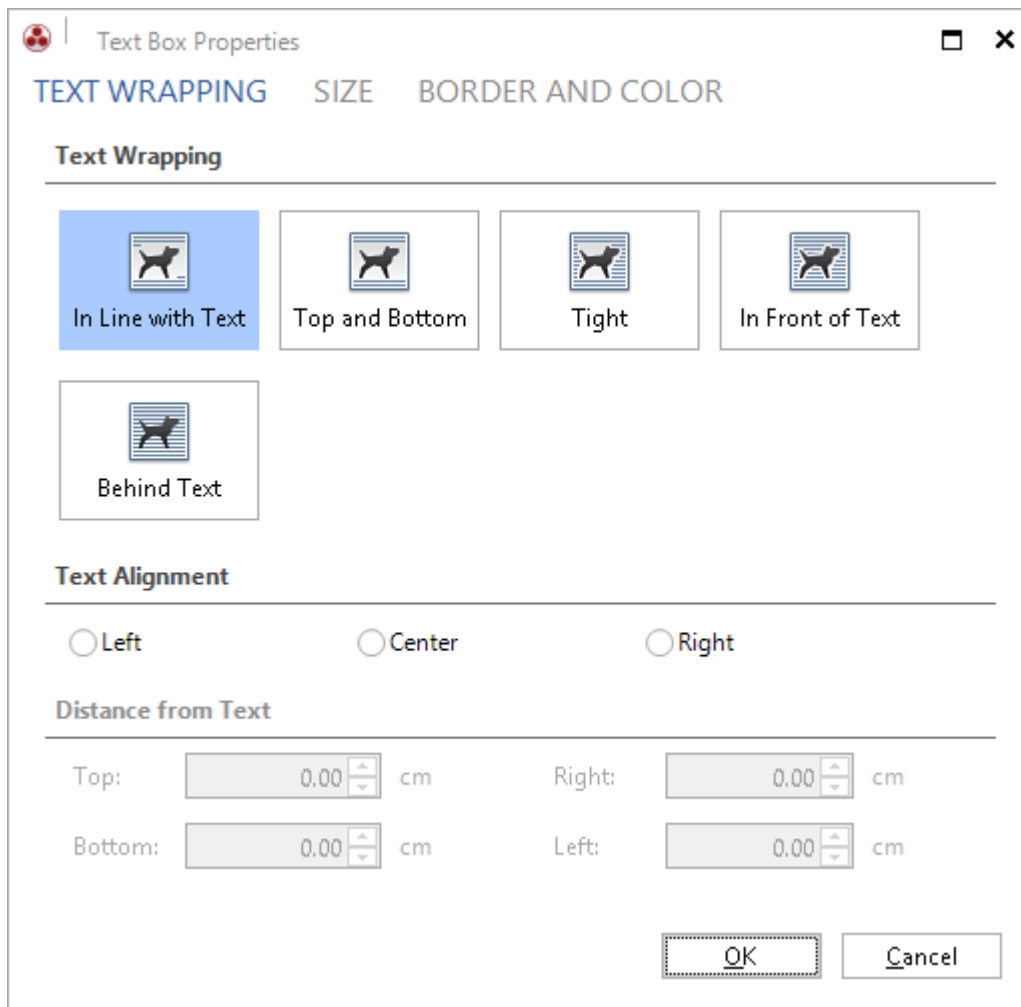
Picture

It is possible to add pictures to your concept. Click the *Picture* button to open a dialog where you can select a picture file to be inserted into the document. When you select the picture, the additional *Picture Tools* ribbon displays. To change the properties of a picture, either click the *Settings* button in the *Picture Tools* ribbon or select *Settings* from the context menu of the picture.



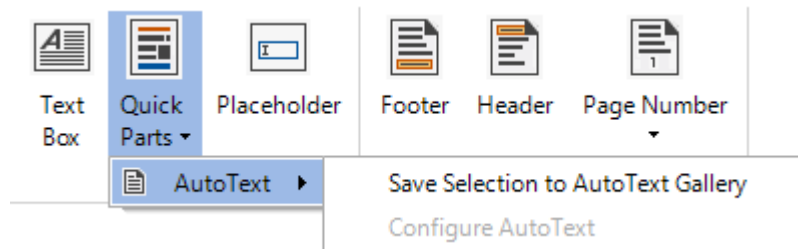
Text Box

To add a text box, click the *Text Box* button. A text box is an object which allows you to place and enter text at any desired location in the document. When you select a text box, the additional *Text Box* ribbon displays. To change the properties of a text box, either click the *Settings* button in the *Text Box* ribbon or select *Settings* from the context menu of the text box.



Quick Parts

Quick parts are stored, reusable contents which can be accessed repeatedly. You can store AutoText in the AutoText gallery by selecting the text to be reused, clicking *AutoText*, and then clicking *Save Selection to AutoText Gallery*. This opens the *Enter AutoText Title* dialog. The name you enter here will be listed in in the AutoText submenu where it is available for selection. The text saved under this name can be re-inserted as desired.

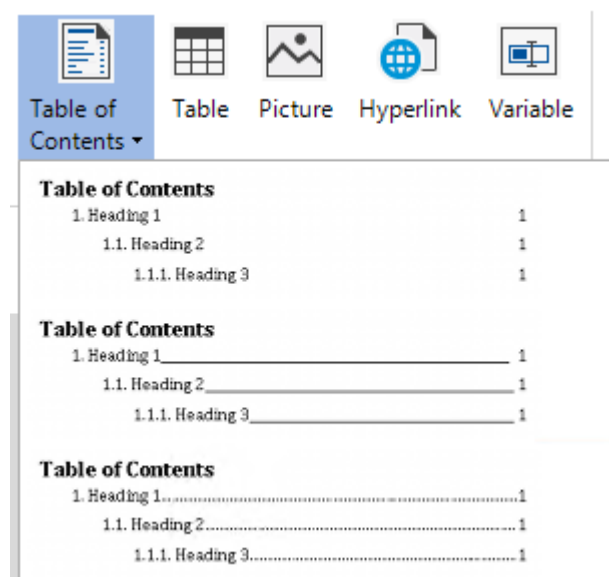


By clicking *AutoText* and then selecting *Configure AutoText*, you can open the dialog for managing the existing AutoText items.

11.2.4 Table of Contents

Click the *Table of Contents* button to add a table of contents to your concept. The captions of the individual elements are listed in the table of contents together with their page number. To create a table of contents, you must apply heading styles to the text you want to include, e.g. Headline 1, Headline 2, etc. The Concept Editor scans the concept for these headings and then generates the table of contents.

When you click the *Table of Contents* button, various designs are displayed that can be selected for the table of contents.

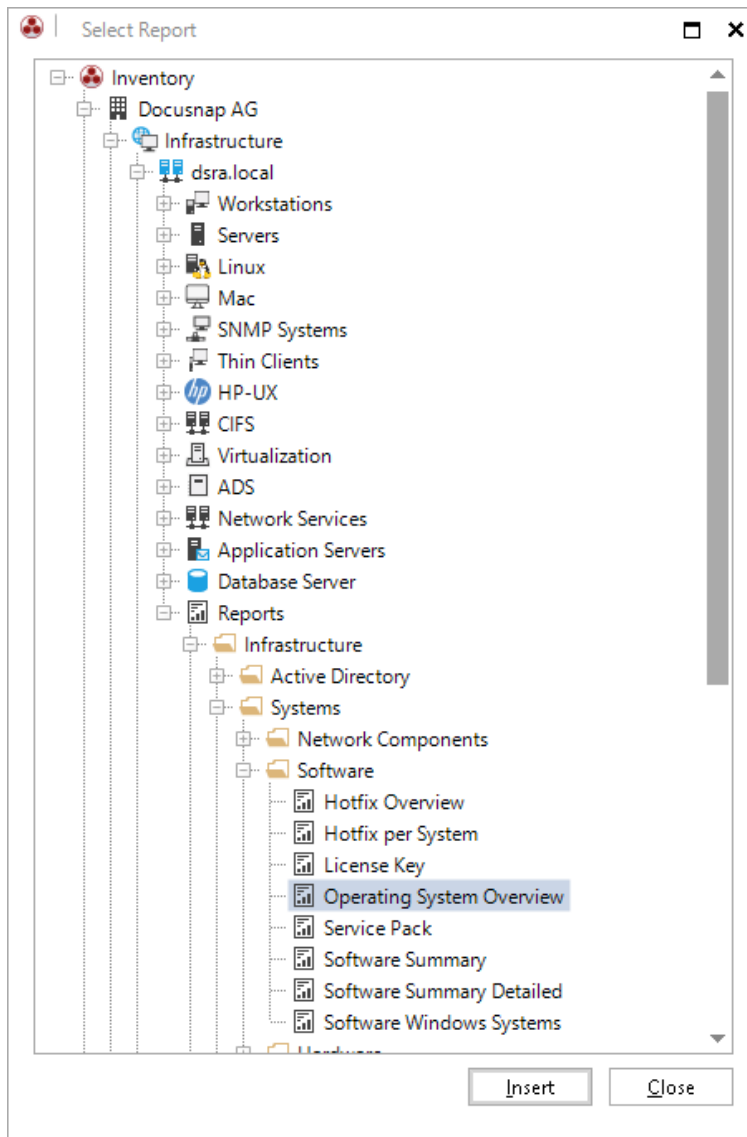


To update the table of contents, click the *Refresh* button in the *General* ribbon.

11.2.5 Report

The *Report* element allows you to insert any report existing in Docusnap into your concept. When you insert a report covering multiple inventory archive versions, Docusnap will always add the most recent inventory data to the concept.

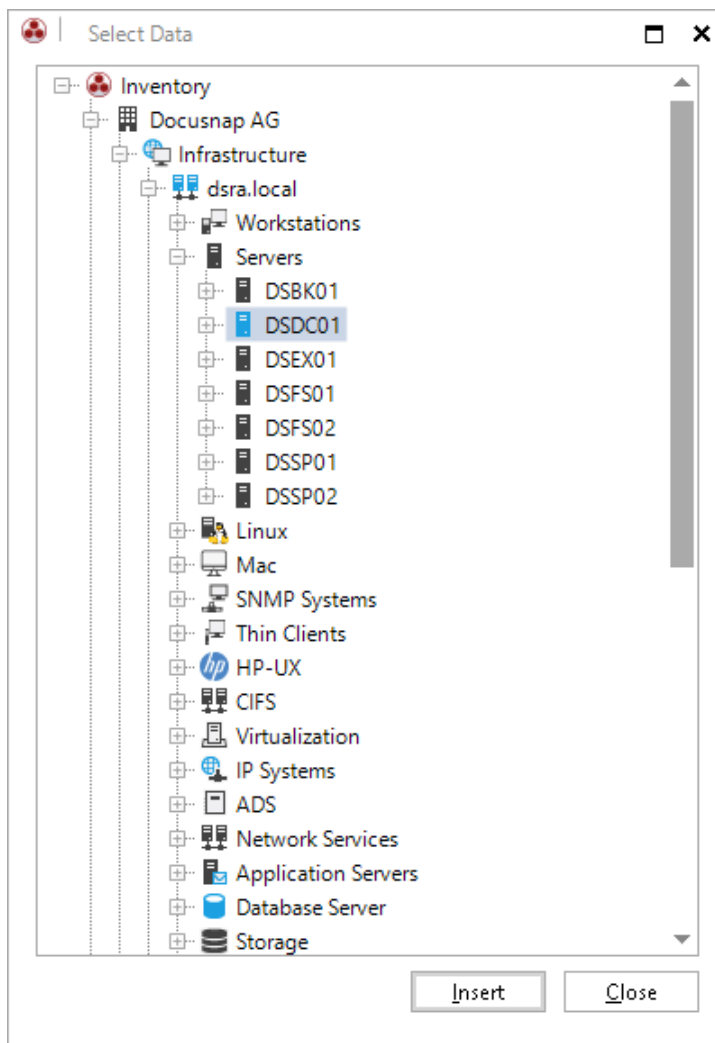
To insert a report into the document, either click the *Report* button from the *Insert* ribbon or can drag it from the object tree and drop it directly onto the desired location in the document.



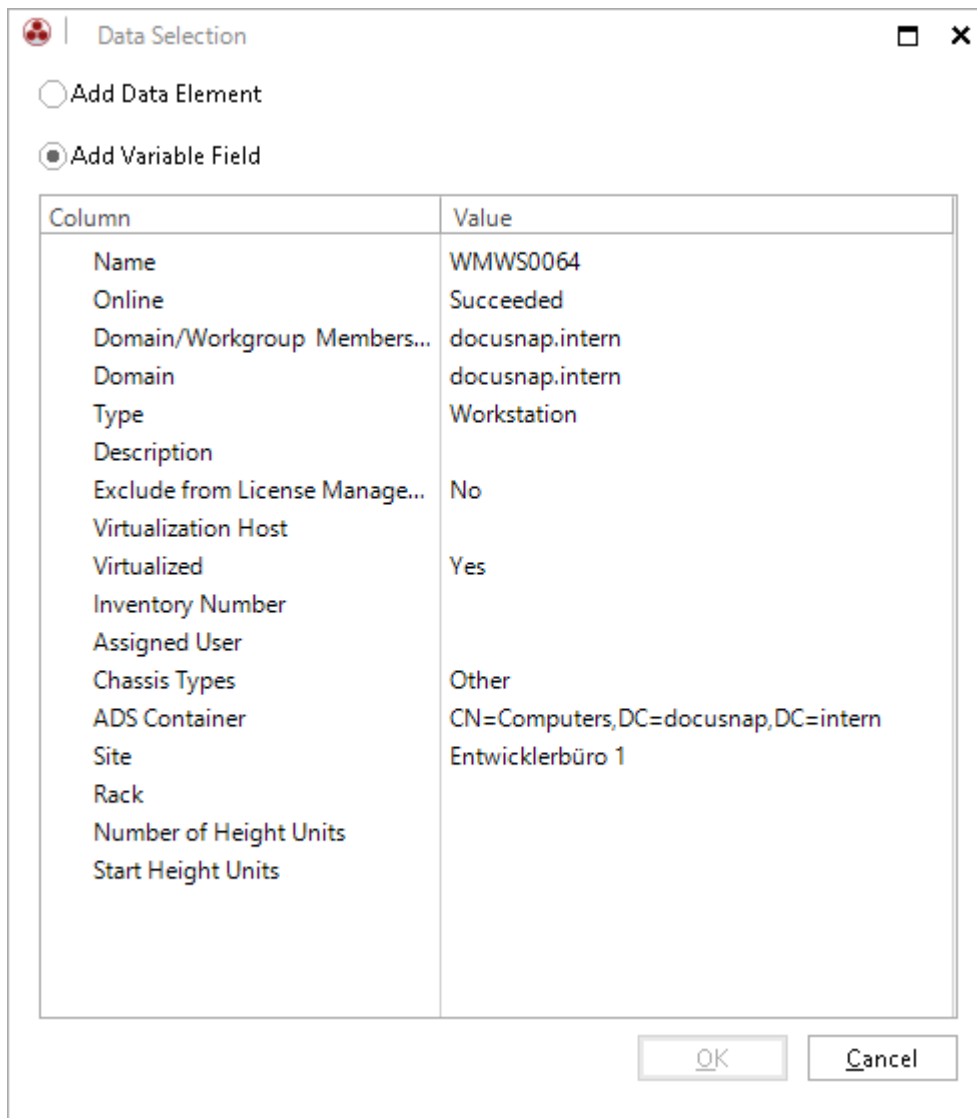
11.2.6 Data Element

You can insert current data from Docusnap into the concept. This loads table content into the concept. Any changes to the dataset automatically update the content.

Click the *Data* button to open the *Select Data* dialog. This dialog displays the existing trees and allows you to select the desired data. If you want to add the workstations table, for example, select the *Workstations* heading and click the *Insert* button to insert the data into the concept.



Alternatively, you also can select the desired table content from the *Objects* window and insert it by drag & drop. When you drag data from the object tree and drop it onto the concept, the *Data Selection* dialog opens. In this dialog, you can select to add a data element or a variable value.

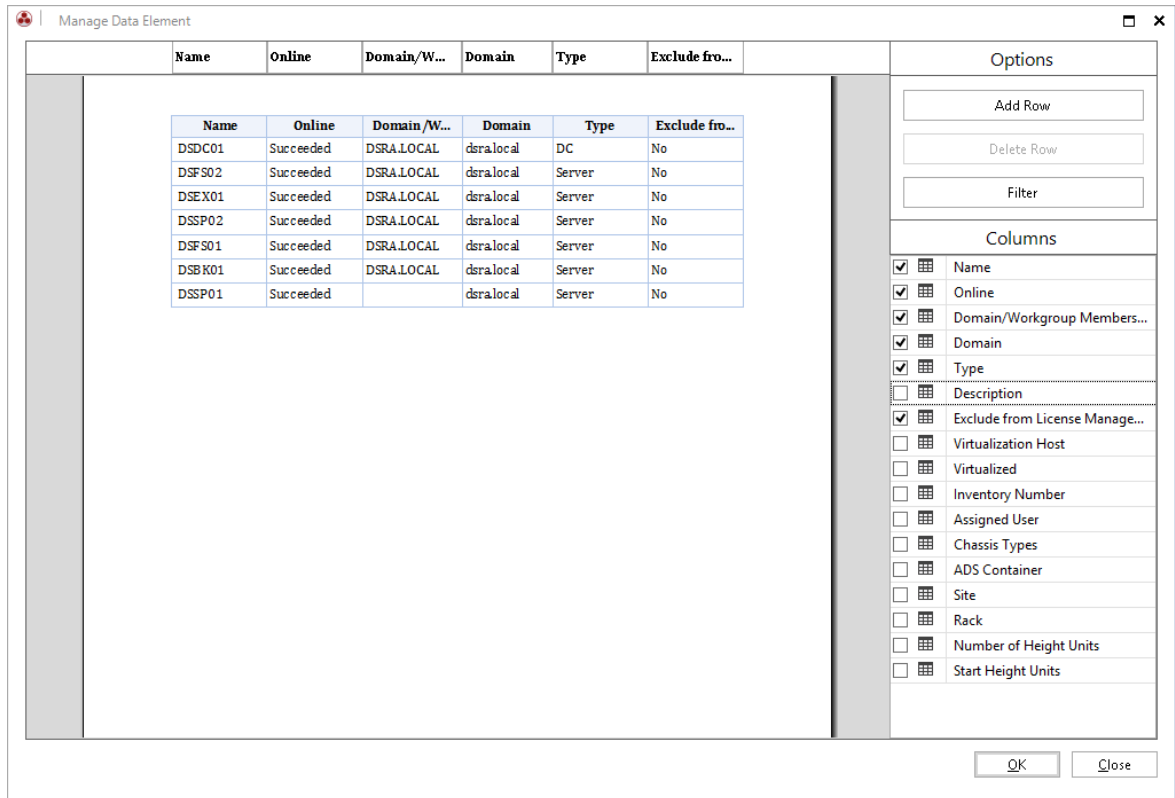


The dialog box is titled "Data Selection" and has two radio buttons: "Add Data Element" (unselected) and "Add Variable Field" (selected). Below the radio buttons is a table with two columns: "Column" and "Value". The table contains 17 rows of data. At the bottom right of the dialog are "OK" and "Cancel" buttons.

Column	Value
Name	WMWS0064
Online	Succeeded
Domain/Workgroup Members...	docusnap.intern
Domain	docusnap.intern
Type	Workstation
Description	
Exclude from License Manage...	No
Virtualization Host	
Virtualized	Yes
Inventory Number	
Assigned User	
Chassis Types	Other
ADS Container	CN=Computers,DC=docusnap,DC=intern
Site	Entwicklerbüro 1
Rack	
Number of Height Units	
Start Height Units	

After the table with its data has been inserted into the concept, you can adjust the way its content will be output. When you select the data element, an additional *Data Element* ribbon displays. By clicking the *Settings* button or by selecting the *Settings* option in the context menu of the data element, you can open the *Manage Data Elements* window. You can drag and drop columns to a different position. The *Add Row* button allows you to add another row. You can move the columns to this row. By clicking the *Delete Row* button, you can remove the bottom row and distribute the columns which are still part of that row to the remaining rows.

With the *Column Options* button, you can select the columns to be displayed.



The 'Manage Data Element' dialog box displays a table of data elements and a list of columns to be filtered. The table has columns: Name, Online, Domain/W..., Domain, Type, and Exclude fro... The columns list includes Name, Online, Domain/Workgroup Members..., Domain, Type, Description, Exclude from License Manage..., Virtualization Host, Virtualized, Inventory Number, Assigned User, Chassis Types, ADS Container, Site, Rack, Number of Height Units, and Start Height Units.

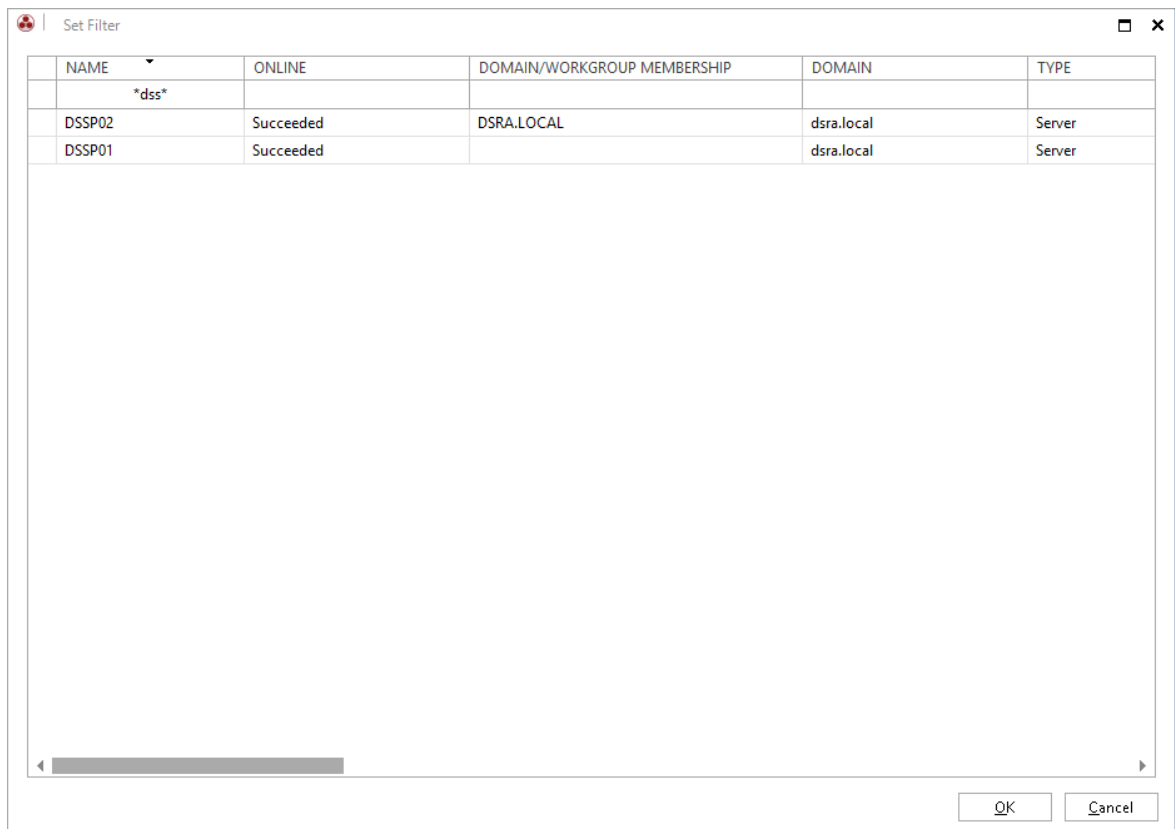
Name	Online	Domain/W...	Domain	Type	Exclude fro...
DSDC01	Succeeded	DSRA.LOCAL	dsra.local	DC	No
DSFS02	Succeeded	DSRA.LOCAL	dsra.local	Server	No
DSEX01	Succeeded	DSRA.LOCAL	dsra.local	Server	No
DSSP02	Succeeded	DSRA.LOCAL	dsra.local	Server	No
DSFS01	Succeeded	DSRA.LOCAL	dsra.local	Server	No
DSBK01	Succeeded	DSRA.LOCAL	dsra.local	Server	No
DSSP01	Succeeded		dsra.local	Server	No

Options: Add Row, Delete Row, Filter

Columns: Name, Online, Domain/Workgroup Members..., Domain, Type, Description, Exclude from License Manage..., Virtualization Host, Virtualized, Inventory Number, Assigned User, Chassis Types, ADS Container, Site, Rack, Number of Height Units, Start Height Units

OK Close

The filter allows you to filter the data that will be displayed in the IT concept. The filter options shown here are similar to the [filter in the main window](#).



The 'Set Filter' dialog box displays a table of data elements with columns: NAME, ONLINE, DOMAIN/WORKGROUP MEMBERSHIP, DOMAIN, and TYPE. The filter is set to '*dss*'. The table shows data for DSSP02 and DSSP01.

NAME	ONLINE	DOMAIN/WORKGROUP MEMBERSHIP	DOMAIN	TYPE
dss				
DSSP02	Succeeded	DSRA.LOCAL	dsra.local	Server
DSSP01	Succeeded		dsra.local	Server

OK Cancel



Some objects can be moved in the data explorer. For example, systems that are moved to another domain, systems that are changed from offline host to Windows systems, or IT assets that are placed in a different folder.

If the data of an object has been added to a concept and this object is subsequently moved in the data explorer, then this data is no longer in the concept after the update. In this case, the data of the object would have to be added again to the concept from the new position in the tree.

11.2.7 File

Use the *File* button to load external data into the concept.

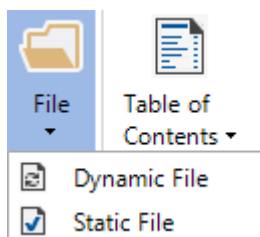
You can insert files of types such as doc, xls, txt, jpg, png, etc. XML files are imported as readable plain text.

Inserting PDF files, however, only works to a limited extent. After a PDF file has been inserted, it will be displayed, but not necessarily with its correct formatting. PDF files do not usually contain any information about the order of text, text flow, etc. Docusnap extracts and converts all of the text it can find, adds missing spaces and paragraph breaks, and re-sorts the various text blocks and images, so that they appear in their logical order.

Visio files (.vsd, .vdx, .vsdx) can only be imported if Visio has been installed on the system. The Visio file can only be imported as a static file. Once the file has been imported, Visio does not need to be installed to update and export the concept.

Html files cannot always be imported completely if they for example contain vector graphics in SVG format or interactive elements (Javascript/ActiveX controls). For that reason, Docusnap maps exported as html files cannot be imported. However, the file can be imported in png format, which is also generated during the map export. In addition, the maps can also be imported via the [Map](#) button, in which case the maps can be updated to the new state if the data situation changes.

There are two different ways to insert files: To select the desired way, first click the *File* button and then select the desired option.



Dynamic File



When you insert a file as a dynamic file, its content is invariable. This method is advantageous in that the inserted file will be updated within the concept if the underlying original file is modified.

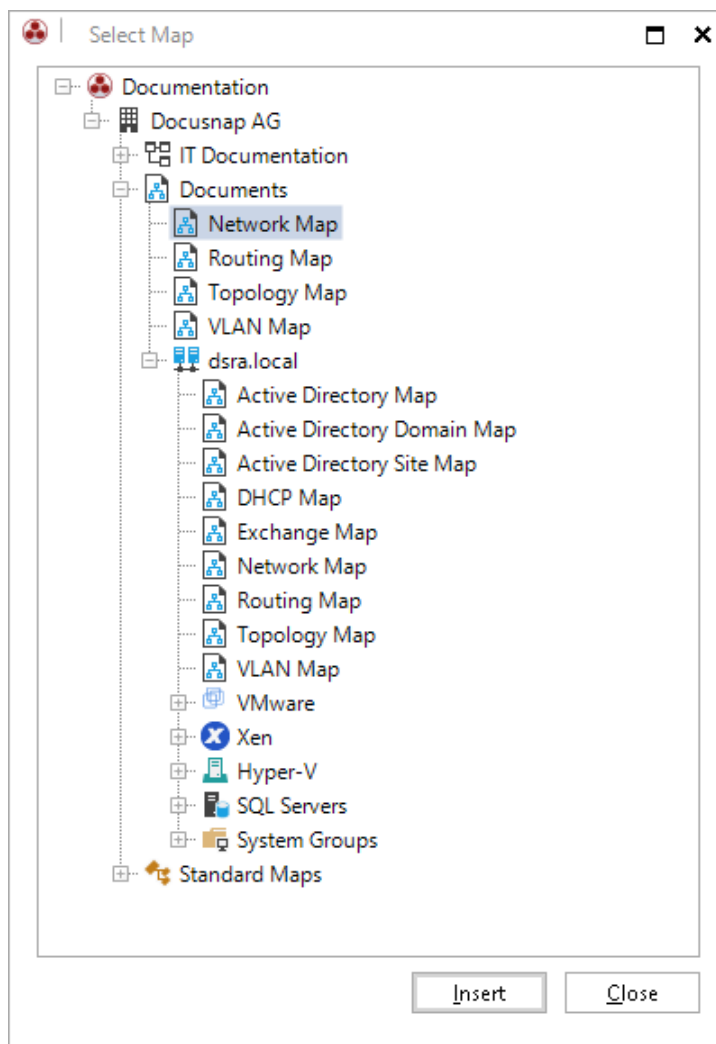
Static File

When you insert a file as a static file, its content is added and can subsequently be modified. In this case, changes to the original file will not be reflected in the concept.

11.2.8 Map

Maps can also be integrated into a concept.

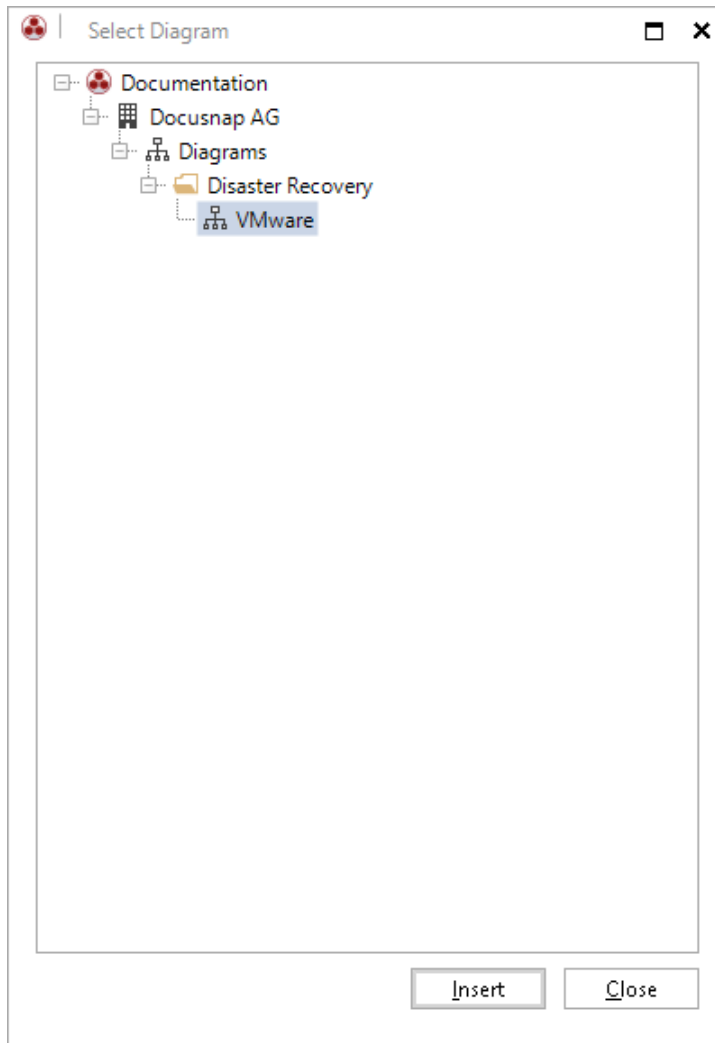
Click the *Map* button in the *Insert* ribbon to open the *Select Map* dialog. Here, you can select a map by expanding the *Documents* node and selecting the desired map. Then, click the *Insert* button to open the associated *Documentation* wizard. Now, you can create the map as described in the [Documentation](#) section. The settings you specify in the wizard are only used to create this map within the concept. They do not affect the maps generated previously in the *Documents* module. If you want to modify a map you generated previously, select it and click the *Settings* button to reopen the map generation wizard. This allows you to modify existing map properties. It is also possible to drag and drop the map onto the output element. This action also opens the map generation wizard.



11.2.9 Diagram

Diagrams created in the *Diagram* module can also be integrated into a concept.

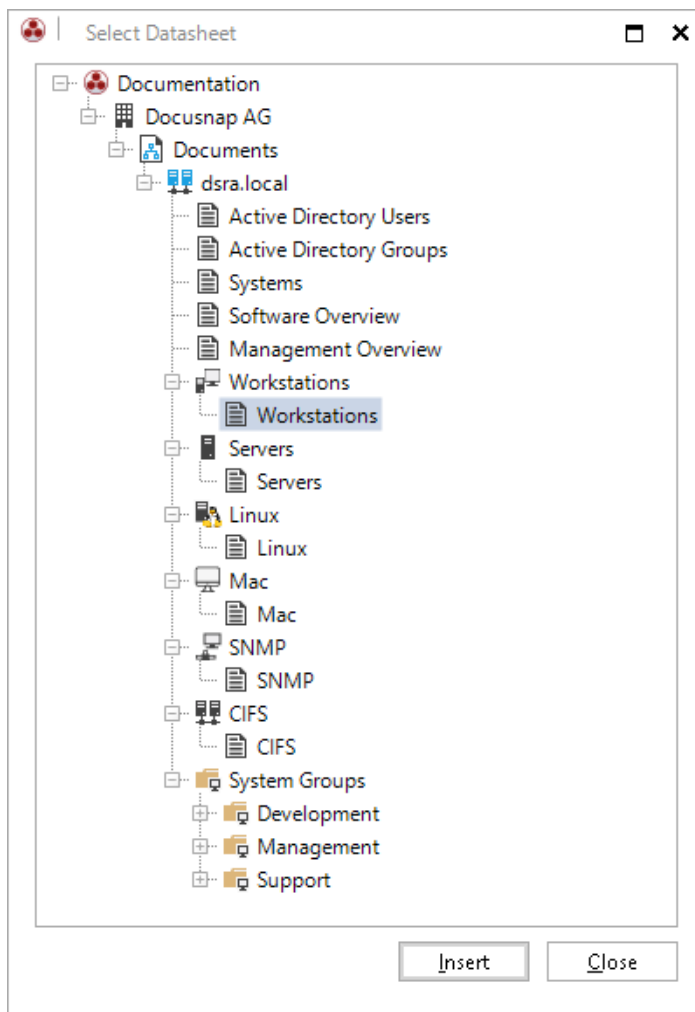
Click the *Diagram* button on the *Insert* ribbon to open the *Select Diagram* dialog. There, you can select a diagram from the *Documentation* explorer. To add the diagram to your concept, select it and click the *Insert* button.



11.2.10 Datasheet

Overviews and datasheets can also be embedded into a concept.

Click the *Datasheet* button to open the *Select Datasheet* dialog. Here, you can select the desired overview or datasheet. This opens the associated documentation wizard. The datasheets or overviews can be created as described in the [Documentation](#) chapter. The settings in the wizard are used for creating the respective overview or datasheet in the output element and do not affect the existing overviews and datasheets in the *Documents* module.



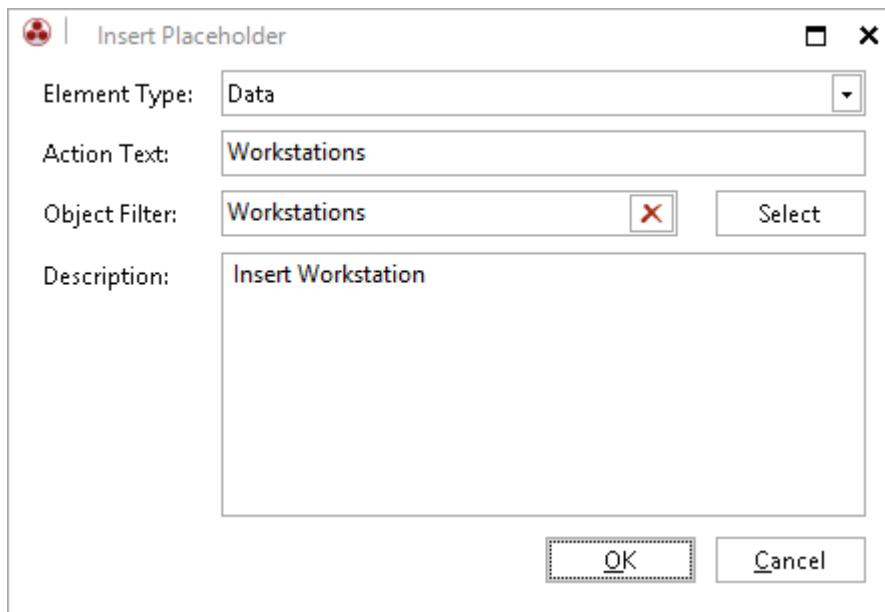
If you want to modify this new datasheet or overview, click the *Settings* button to reopen the Documentation wizard where you can generate datasheets or overviews. This allows you to modify existing properties. You can also drag a map or a datasheet and drop it onto the document. This will also open the *Documentation* wizard.

11.2.11 Placeholder

Using placeholders, you can identify the locations where particular information should be inserted. This allows you to define a structure a user should follow when creating a concept.

Creating Placeholders

Click the *Placeholder* button in the *Insert* ribbon to open the *Insert Placeholder* dialog. A placeholder can be defined for data, reports, maps, text, etc. Select the desired type from the *Element Type* dropdown list. The action text you specify is displayed in the document before the placeholder will be replaced with the corresponding data. The *Object Filter* field allows you to define that, e.g., only network maps or the data of workstations may be inserted. Click the *Select* button to open a window which displays the data available for the selected type. For example, if you want to insert only workstation data at a certain location, select the *Workstations* sub-node and click the *OK* button. The specified description will be displayed in the *Tasks* window at the bottom of the editor. Finally, click *OK* to add the placeholder to your document.

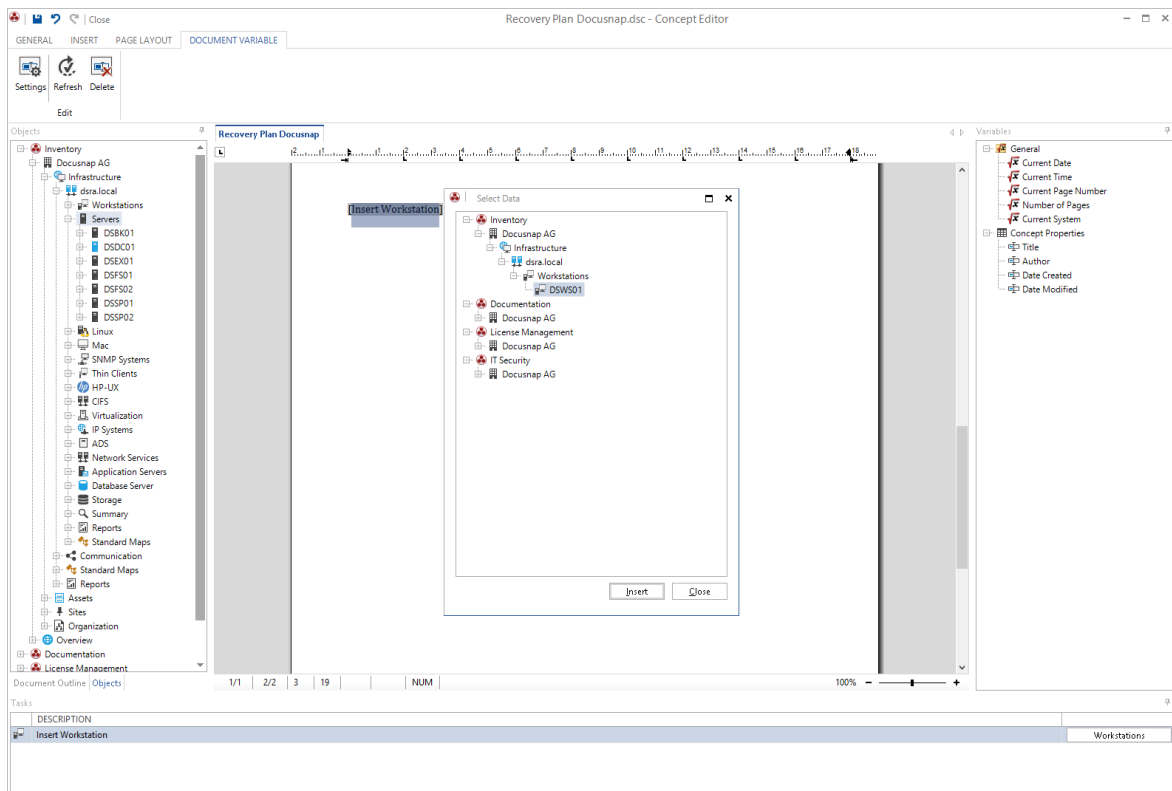


The screenshot shows the 'Insert Placeholder' dialog box. It has a title bar with a red icon and the text 'Insert Placeholder'. The dialog contains the following fields and controls:

- Element Type:** A dropdown menu with 'Data' selected.
- Action Text:** A text box containing 'Workstations'.
- Object Filter:** A text box containing 'Workstations', a red 'X' icon, and a 'Select' button.
- Description:** A large text box containing 'Insert Workstation'.
- Buttons:** 'OK' and 'Cancel' buttons at the bottom right.

Applying Placeholders

If a document contains placeholders, they will be highlighted in gray. In the *Tasks* window, the description of each placeholder will be displayed. Click the button with the action text in the *Tasks* window to open the selection window for the data which is available for this placeholder. Once you have selected the data, it replaces the placeholder.



11.3 Composition

A Composition is a document created from multiple concepts. Through compositions, concepts can be used multiple times, or larger concepts can be split up for easier editing. If the concepts of the composition are changed, the composition document also changes.

If the node *Concepts* or a concept folder in the tree has been selected, the button *Add* can be used to open dialog to create the composition.

The composition requires a name. As the author, the current user is entered. If desired, author can be changed afterwards.

The left panel lists all the concepts of the current company. These can be added to a composition. In the right box all added concepts are listed. Use the arrows above to change the order of the concepts.

The *Section Break* combobox determines whether the selected concept should start on a new page or be added on the next line after the end of the previous concept.



For the *Header & Footer* you can define whether no header / footer, the header / footer of the previous concept or the header / footer of the selected concept should be used.

Using the *Export Concept* button, you can export your concept to Word, PDF, or other formats.

The export of compositions can also be [scheduled](#) like the export of the concepts.

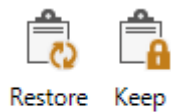
11.4 Versions

To save a concept, click the *Save* button. This opens a submenu where you can decide whether to simply save the concept, to save it as a new version, or to save it as a template. When you select *As New Version*, the current state of the concept will be saved as a separate version. Versions are displayed together with their save date below the concept node in the Docusnap tree view. You can also enter an additional description. This description is displayed behind the version.

For each concept, you may create up to ten different versions. When this number is reached and you save a new version, the oldest version will be deleted. The number of versions can be changed in the [Options - Documents](#) dialog. To exclude a version from deletion, you can click the *Keep* button and set this version as not to be deleted. A version flagged as to be kept will be excluded from the count of ten versions that can be stored.

Restore

By clicking the *Restore* button the selected version can be restored. Thus, the current concept is replaced and the selected version can be edited. The restored version will remain.



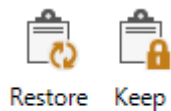
Versions/Backup

11.5 Backups

Whenever a concept is saved, a backup is created. As a result, older versions can always be restored and changes can be tracked. By default, up to 10 backups per concept are stored. This number can be adjusted in the [Options - Documents](#) dialog. Older backups will be deleted. The *Keep* button allows the selected backup not to be deleted.

Restore

Click on the *Restore* button to restore the currently selected backup. This will replace the current concept and allow the selected backup to be edited. The restored backup will remain.



Versions/Backup


11.6 Templates

You can save any previously created concept as a template and use it later to create a new concept based on this template.

Save as Template


After creating your concept, you can it save as a template for further concepts. After a click on the *Save* button, you can select *As Template* to open the *Save Concept Template* dialog. Enter a name for the template in this dialog. The template will then be saved to database.

The template is created in the language of the concept from which the template is created. After entering the name, you can save the template which will then be available when creating new concepts.

 Save Concept Template
 □ ×

Name:

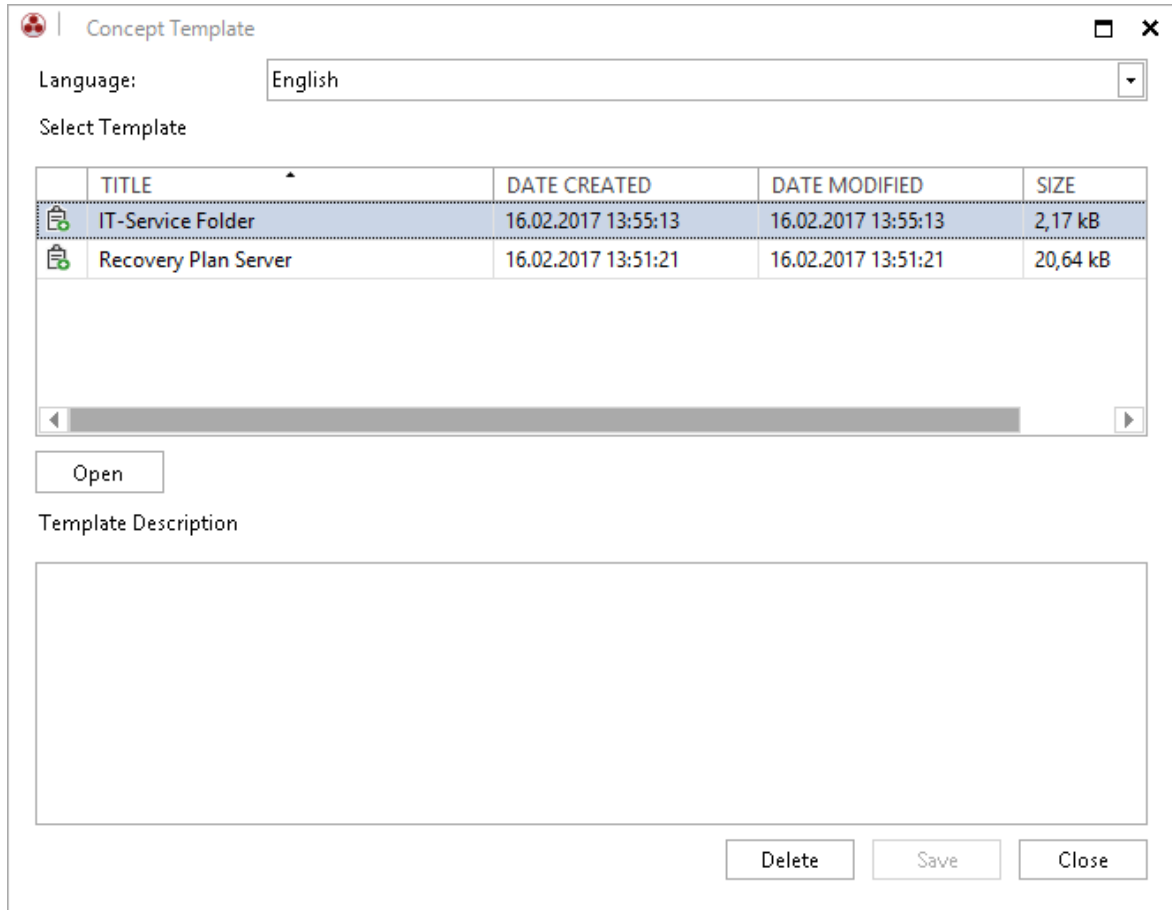
☐ Overwrite Existing Template

	TITLE	DATE CREATED	DATE MODIFIED	SIZE	LANGUAGE
	Recovery Plan Server	07/03/2019 10:50:58	07/03/2019 10:50:58	22,44 kB	English



Save
Close

Manage Concept Templates

Existing templates can be deleted from the *Concept Template* dialog that can be opened by clicking *Templates* from the *Concepts* ribbon. In addition, you can add a description to each template. Use the *Language* drop-down list to select the German or the English templates to be listed.



The image shows a 'Concept Template' dialog box. At the top, there is a title bar with a red icon and the text 'Concept Template'. Below the title bar, there is a 'Language:' label followed by a dropdown menu showing 'English'. Underneath, there is a 'Select Template' label. Below this is a table with four columns: 'TITLE', 'DATE CREATED', 'DATE MODIFIED', and 'SIZE'. The table contains two rows: 'IT-Service Folder' and 'Recovery Plan Server'. Below the table is a horizontal scrollbar. Under the scrollbar is an 'Open' button. Below the 'Open' button is a 'Template Description' label. Below this is a large text area for the description. At the bottom right, there are three buttons: 'Delete', 'Save', and 'Close'.

	TITLE	DATE CREATED	DATE MODIFIED	SIZE
	IT-Service Folder	16.02.2017 13:55:13	16.02.2017 13:55:13	2,17 kB
	Recovery Plan Server	16.02.2017 13:51:21	16.02.2017 13:51:21	20,64 kB

Open

Template Description

Delete Save Close

Creating a Document from a Template

When creating a new document, you can either start with an empty document or select an existing template from the *Template* list. Depending on the language selected for the concept, the available templates are offered for selection.

When creating a document, you must specify a name for it. A click on the *Create* button creates a new document based on the selected template.

Create Concept

Concept Name: Language:

Template:

Empty Document

Recovery Plan Server

IT-Service Folder

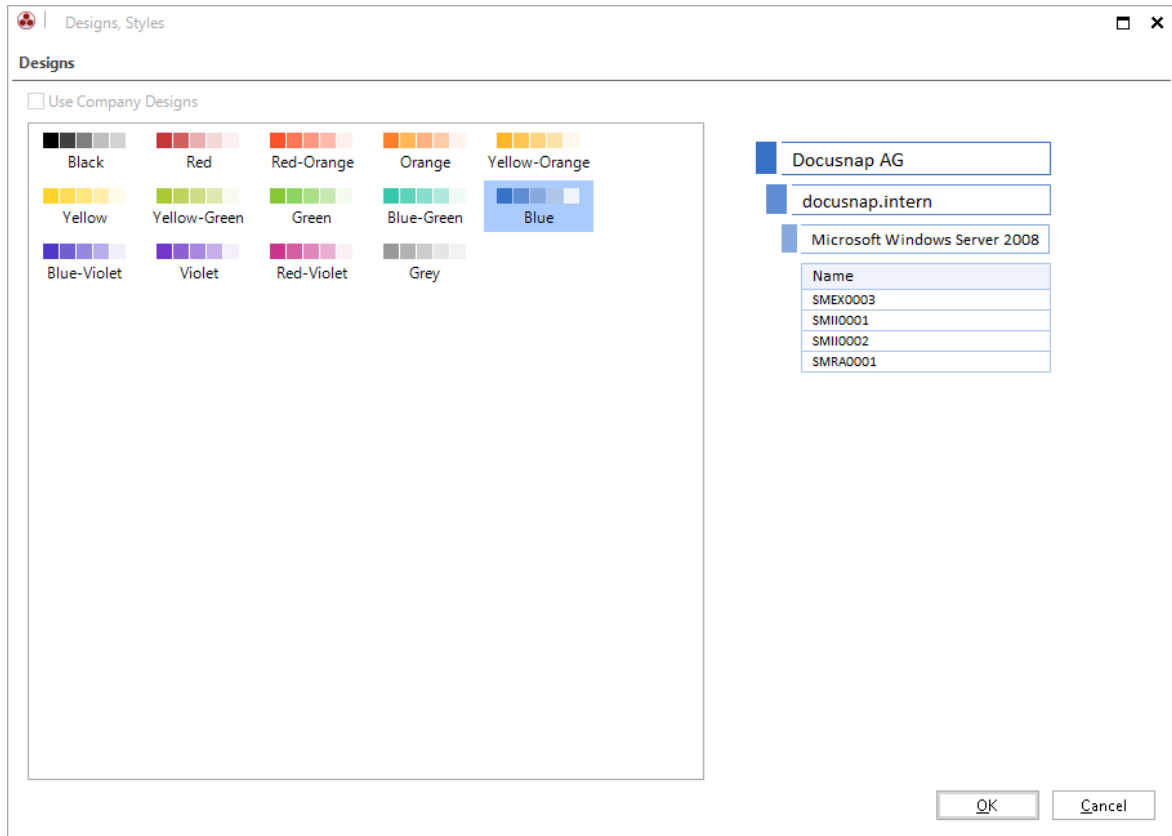
Recovery Plan

Emergency Manual

- Recovery Plan
 - 1. Responsibilities
 - 1.1. Responsible System Manager
 - 1.2. Responsible technical manager for the affected business process
 - 1.3. Responsible manager for recovery implementation
 - 2. Required Components for the emergency and regular operation
 - 2.1. Required Systems
 - 2.2. Interfaces and Dependencies
 - 2.3. Required Infrastructure
 - 3. Providing the Components
 - 3.1. Internal and external alternatives in emergency operation
 - 3.2. Procurement of components for emergency operation and for regular operation
 - 3.3. Replacement options or Replacement
 - 4. Restart / Recovery in emergency and regular operation
 - 4.1. Recovery Times
 - 4.2. Order for the restart of the IT systems and applications in emergency
 - 4.3. Order for the restart of the IT systems and applications in regular operation
 - 5. Construction and installation of the necessary components
 - 5.1. Hardware configuration
 - 5.2. Loading the system software
 - 5.3. Loading the application software
 - 5.4. Individual configuration
 - 5.5. Importing the data from backup media
 - 5.6. Recovery of the IT system and integration into the system landscape

11.7 Designs

The design selected in the *Layout (CI)* dialog will be used for the concept. It is possible to choose an individual design for each concept. Clicking the *Design* button opens the *Designs and Styles* dialog. There, you can select a design for the currently open concept.

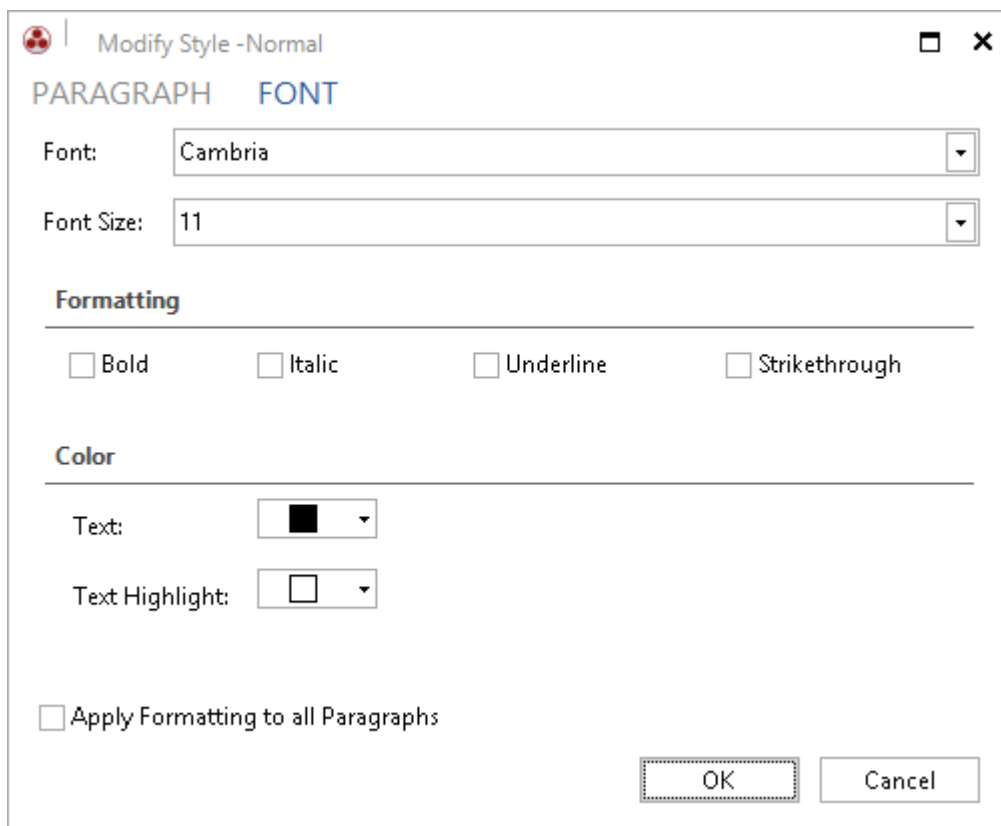


11.8 Styles

Styles are used to achieve centralized formatting of text.

The *Headline 1* through *Headline 4* styles are used for headings. In addition, they are taken into account when creating the [Table of contents](#) and for the entries in the [Document Outline](#) window.

The context menu for each style in the *Styles* group allows you to modify the formatting. Click the *Modify* option to open the *Change Style* dialog. In this dialog, you can adjust the formatting for the selected style.

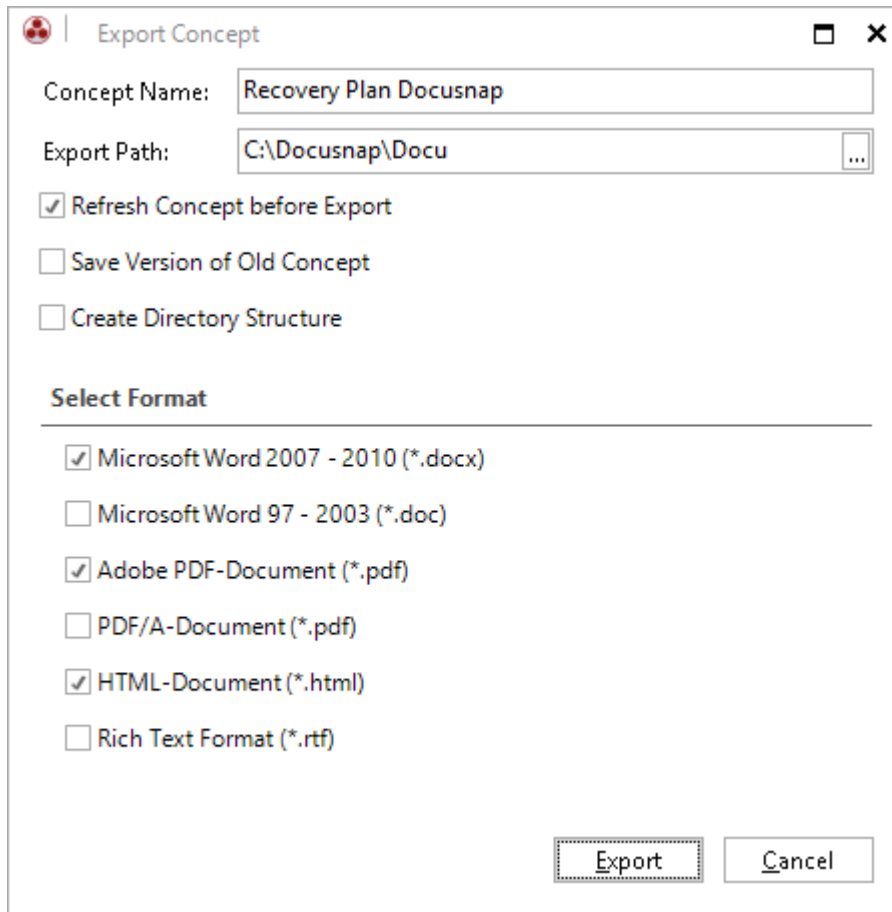


Changes to a style are applied to all texts to which this style has been assigned.

However, if, for example, the font of a paragraph is changed and then the font is changed in the respective style, the font is only adjusted if the *Apply Formatting to all Paragraphs* check box is selected. If the check box is unchecked, only those formatting changes that have not already been adjusted manually are applied.

11.9 Export and Scheduling

Using the *Export* button, you can export the selected IT concept to various formats. In the *Export Concept* dialog, you can enter the name of the file and select the path and file type to export the concept to. If the *Refresh Concept before Export* checkbox is checked, all inserted elements such as reports, plans, etc. are refreshed with the current data. If the *Save Version of Old Concept* checkbox is activated, the concept will be saved as a version before the refresh.



Export Concept

Concept Name:

Export Path:

☒ Refresh Concept before Export

☐ Save Version of Old Concept

☐ Create Directory Structure

Select Format

☒ Microsoft Word 2007 - 2010 (*.docx)

☐ Microsoft Word 97 - 2003 (*.doc)

☒ Adobe PDF-Document (*.pdf)

☐ PDF/A-Document (*.pdf)

☒ HTML-Document (*.html)

☐ Rich Text Format (*.rtf)

When creating a concept, you can also use the Scheduling feature. Click the *Schedule as Job* button on the *Concepts* ribbon to launch the *Documentation* wizard.

For a description of the basic steps in this wizard, refer to the [Basic Steps](#) section of the Documentation chapter. In the *Concepts* step, proceed as follows:

Under *Export Formats*, select the file type to which you want to export the concept. From the *Available Concepts* table, you select the concepts to be exported. The table lists all existing concepts. If the *Refresh Concept before Export* checkbox is checked, all inserted elements such as reports, plans, etc. are refreshed with the current data. If the *Save Version of Old Concept* checkbox is activated, the concept will be saved as a version before the refresh.

Concepts can be organized in folders. If the *Create Directory Structure* checkbox is activated, the folders which contain the concepts will be created during the export.

Documentation

1

2

3

4

5

Company Selection
Concepts
Distribution
Summary
Distribution

☒ Refresh Concept before Export
☐ Save Version of Old Concept
☒ Create Directory Structure

☒ PDF
☒ DOC
☒ DOCX
☒ RTF
☒ HTML

Available Concepts

<input checked="" type="checkbox"/>	NAME	CREATED
<input checked="" type="checkbox"/>	Recovery Plan Docusnap	16.09.2016

Back
Next
Cancel

For proper scheduling, specify a name, the schedule type, the interval, the number of recurring executions, the starting date and time. Furthermore, the [Docusnap Server](#) must have been configured successfully. For more information on *Automatic Scheduling*, refer to the [Scheduling](#) chapter.

Documentation

1

2

3

4

5

Company Selection

Concepts

Distribution

Summary

Distribution

☒ Schedule Task

Name:

Schedule Type:

Every week on Wednesday at 10:00:00. Schedule will be used from 16.09.2016.

Frequency

Interval:

Recurring every: week(s) on:

☐ Monday ☐ Tuesday ☒ Wednesday ☐ Thursday ☐ Friday ☐ Saturday ☐ Sunday

Frequency per day

☒ Once at:

☐ Every:

Start:

Ende:

Duration

Start Date:

☒ No End Date ☐ End Date:

Back

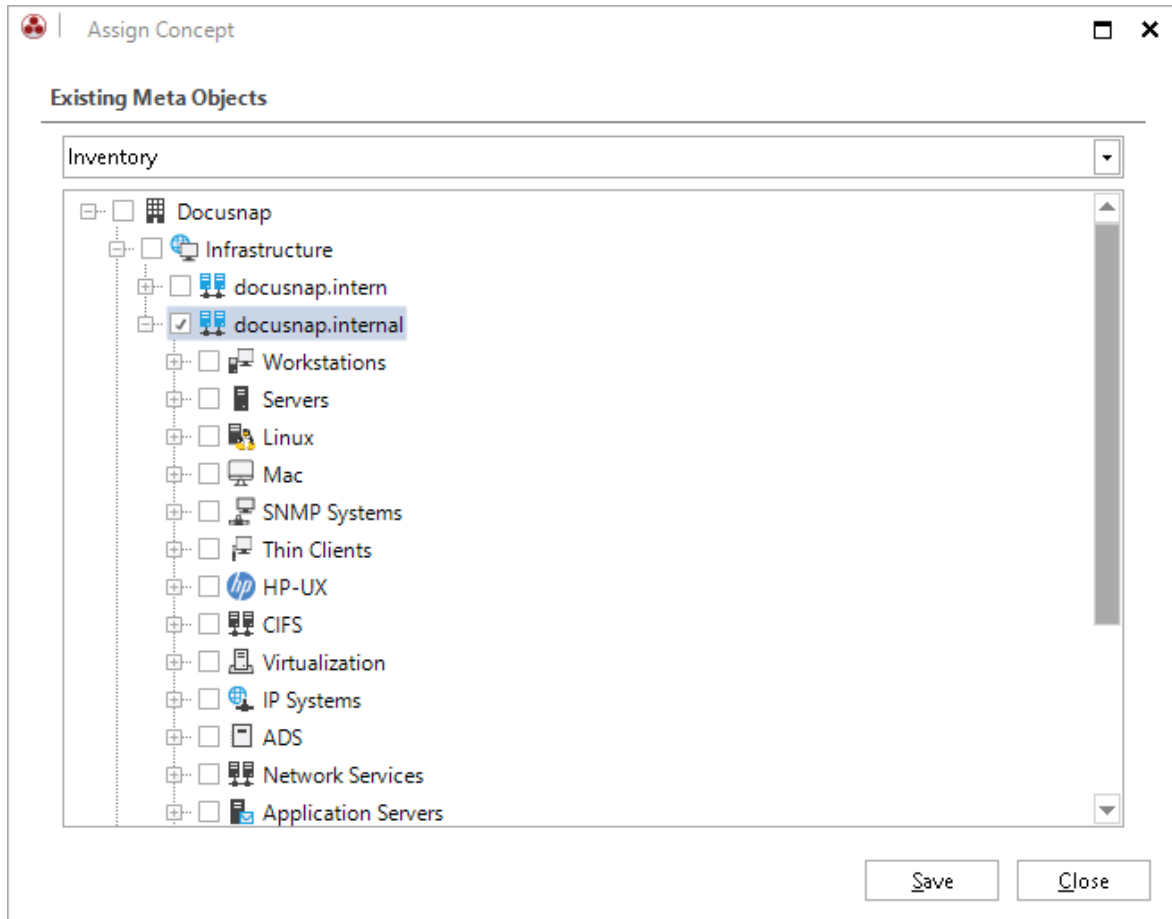
Finish

Cancel



11.10 Assignment

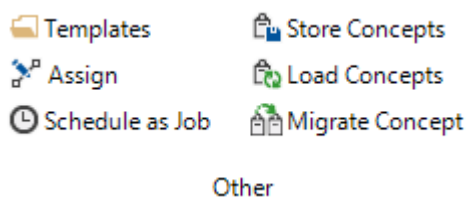
The *Assign* button in the *Concepts* ribbon allows you to insert existing concepts and directories at any desired position in the Explorer. To assign a concept, select it and click the *Assign* button to open the following dialog.



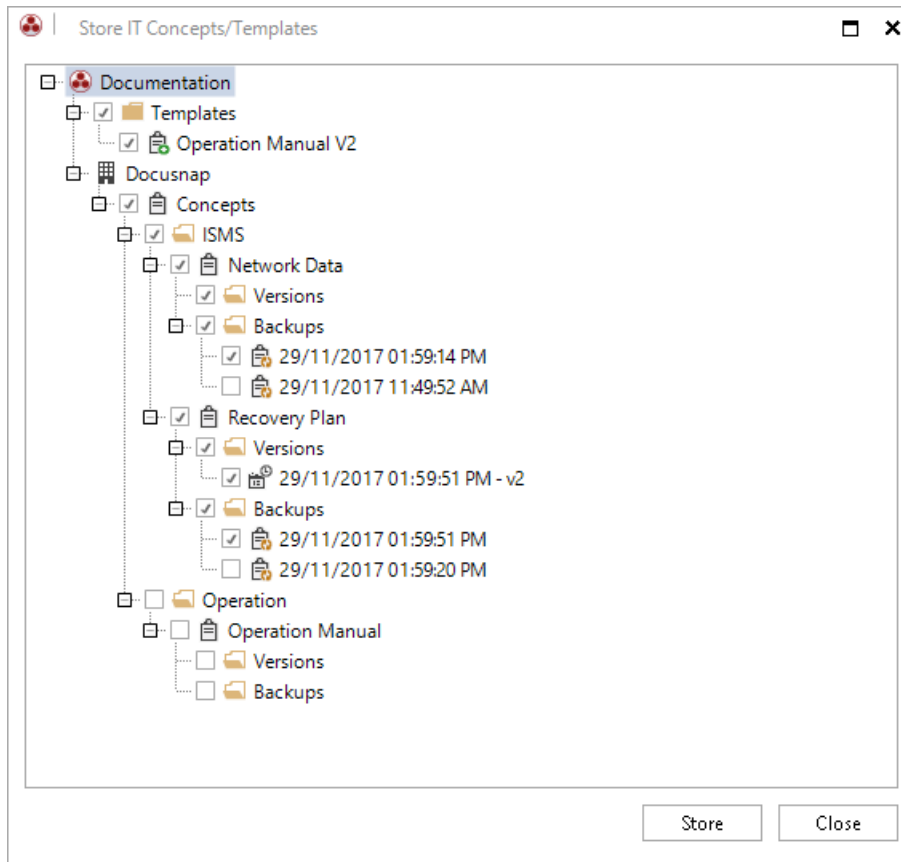
Use the drop-down list to select the desired Explorer and tick the checkbox for the hierarchical level where you want to insert the concept or the directory. The inserted concept or directory is always located directly below the desired node in the selected Explorer.

11.11 Store/Load Concept


The files of the concept are stored in the database. If the concepts and templates are to be reused in another database, they can be saved to a file and subsequently loaded again using the *Store Concepts* and *Load Concepts* buttons.



The desired files can be selected in the *Store IT Concepts/Templates* dialog. Click on the *Store* button to select the location and save the file.



In the dialog *Load IT Concepts/Templates*, a file is selected which content should be loaded. After the file has been selected, you can choose which concepts and templates to load. In the *Import Mode* combo box you can choose whether the concepts should be overwritten. The comparison of the concepts is done via the unique number of the IT concept not by name. If an IT concept is imported, which is not the same concept but one with the same name, there will be two concepts with the same name.


Load IT Concepts/Templates

Company:

Docusnap

Select Data:

C:\Docusnap\Concept\ConceptBackup.dcc

Import Mode:

Overwrite existing concepts / templates

Select Concepts/Templates:

☒
☒
Templates

☒
☒
Operation Manual V2

☒
☒
Concepts

☒
☒
ISMS

☒
☒
Network Data

☒
☒
Backups

☒
☒
11/29/2017 13:59:14

☒
☒
Recovery Plan

☒
☒
Versions


☒
☒
11/29/2017 13:59:51 v2

☒
☒
Backups

☒
☒
11/29/2017 13:59:51

Load

Close



Changing Date: 1/21/2020

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Part

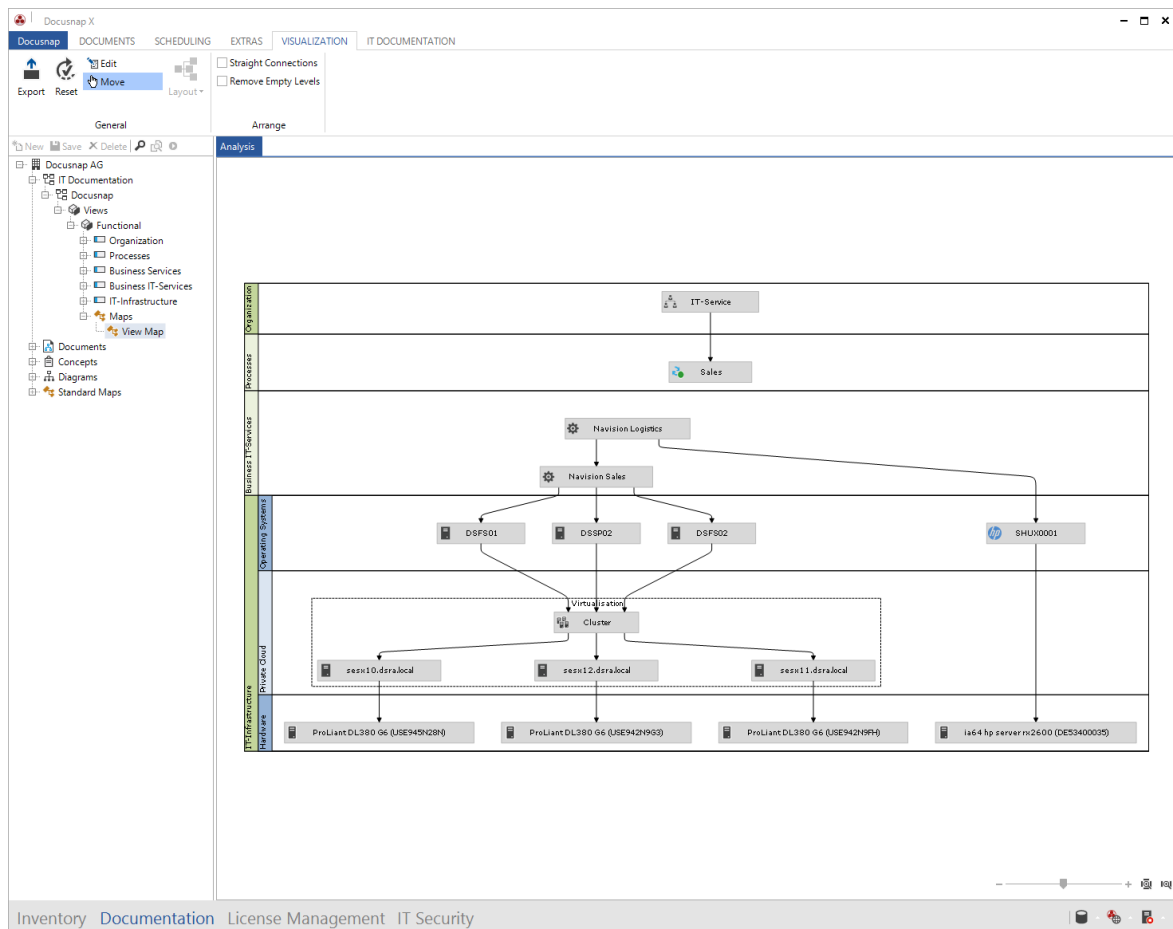
XII

12 Business Structures

Information technology is used throughout every company to support business processes. There are virtually no business activities which are not supported by IT. To detect business threats and risks as quickly and early as possible, every company needs IT documentation which is capable of presenting the connections between business processes and IT in a clear and transparent way. This makes it possible to answer questions such as which business processes depend on which software, hardware or network connection, or which processes are trivial or vital for the company. Docusnap enables users to completely map out the interrelations between organizational units and the associated processes, right up to the physical location. This helps them to understand at any stage which concrete effects IT changes or failures have on business processes. Docusnap's business integration allows for the connections and dependencies between business processes, IT services and the required IT systems to be presented in a clear and transparent way. Users can therefore quickly and easily analyze business-critical risks and weaknesses which go unnoticed in efforts to support business processes, and specifically counteract them.

Docusnap offers complete freedom when it comes to graphical representations. For example, on a technical level, processes, organizational units and business services can be captured, whereas from an IT point of view there is the option of representing IT services, the infrastructure as well as facility components. It is possible to expand and add to any definitions.

Docusnap provides the framework for capturing and visualizing various elements, which gives the option of introducing new levels and defining groups (e.g. for clusters). Additional attributes such as SLAs, recovery times, priority etc. can be added to any element.



12.1 Basics

The framework for the business structures is located in the hierarchy *Documentation*. An additional editor is provided to create the documentation framework.

Business structures consist of the following components:

Framework

A framework is a self-contained unit for a documentation. The name of the framework is on the top level. Within the framework, all necessary views, levels, elements, structural elements, groups and properties are linked to one another.

A framework can have multiple views. In addition, the entire framework can be exported and reused in another database.

Views

Using views it is possible to create different views on the same data within a framework. By creating multiple views it is possible to look at the same data from different angles and bring them into context with each other. Depending on

whether data is to be displayed according to functional or technical aspects, for example.

Levels

Levels provide a visually coherent representation of elements. Within a framework a once created level with all associated elements can be used in different views. Structural elements, elements and groups can be assigned to a level.

Structural Elements

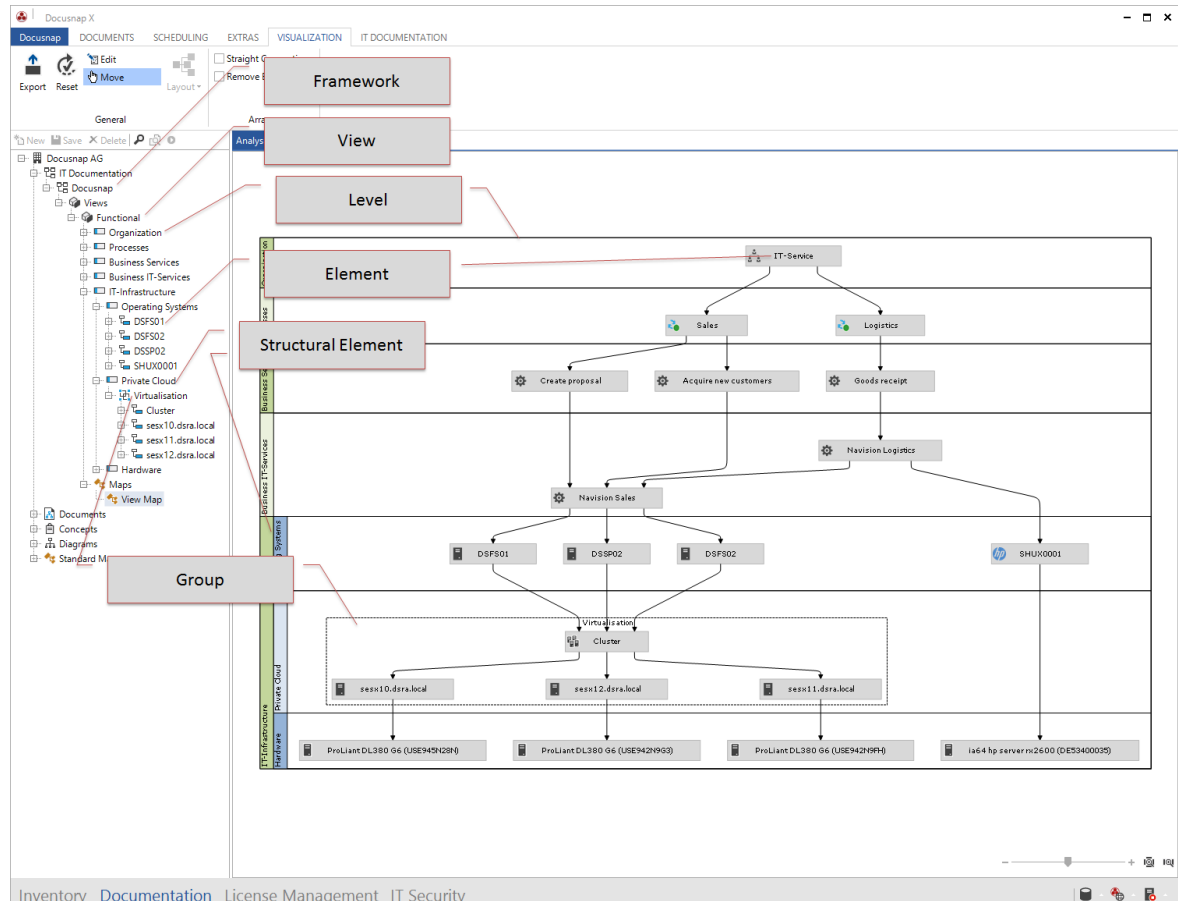
Structural elements can be used to create additional sub-levels in each level. These serve above all the better structuring of elements.

Elements

Elements are always assigned to a certain level or structural element. In principle, the used elements are always objects from the inventory tree of Docusnap.

Gruppen

By using groups several elements can be combined into optical or logical units. This also serves for better visualization and in certain scenarios also the technical correctness of the representation.



Properties

Different properties can be stored for elements to describe them further or to document features. Properties can be defined at will, eg "downtime" for a server. They are always assigned to the layers or structural elements and are thus assigned to all the elements assigned to them.

12.2 Create IT Documentation

Editor

For creating and editing of the IT documentation frameworks a separate editor is provided. Once the *IT Documentation* heading or an underlying node is selected, the *IT Documentation* ribbon is displayed. Click on the *Editor* button to open the editor in a separate window.

The left pane displays a data structure that displays all existing IT documentation frameworks. The appropriate buttons are made available in the ribbon, depending on which node was selected in the data structure. For example, when a view is selected, the *Add New Level* button is displayed. In the main area the data entry screen is displayed for the selected node. In addition, there is the *Visualization* window. In this windows a preview of the business structures is created immediately after saving of every change of the structure.

Ribbon

Main Area

Data Struktur

Visualization

Predecessor & Successor

Predecessor	ELEMENT NAME	STRUCTURAL ELEMENT	OBJECT NAME
<input checked="" type="checkbox"/>	IT-Service	Organization	Organization
<input type="checkbox"/>	Logistics	Processes	Process
<input type="checkbox"/>	Sales	Business Services	Service
<input type="checkbox"/>	Create proposal	Business Services	Service
<input type="checkbox"/>	Acquire new customers	Business Services	Service
<input type="checkbox"/>	Goods receipt	Business Services	Service
<input type="checkbox"/>	Navigation Sales	Business IT-Services	Service
<input type="checkbox"/>	Navigation Logistics	Business IT-Services	Service
<input type="checkbox"/>	DSSP02	Operating Systems	Servers
<input type="checkbox"/>	DSFS02	Operating Systems	Servers
<input type="checkbox"/>	SHUX0001	Operating Systems	HP-UX
<input type="checkbox"/>	Virtualisation	Private Cloud	Computer Reso...
<input type="checkbox"/>	Cluster	Private Cloud	Hosts
<input type="checkbox"/>	sex10.dsra.local	Private Cloud	Hosts
<input type="checkbox"/>	sex13.dsra.local	Private Cloud	Hosts

Successor	ELEMENT NAME	STRUCTURAL ELEMENT	OBJECT NAME
<input checked="" type="checkbox"/>	IT-Service	Organization	Organization
<input type="checkbox"/>	Logistics	Processes	Process
<input type="checkbox"/>	Sales	Business Services	Service
<input type="checkbox"/>	Create proposal	Business Services	Service
<input type="checkbox"/>	Acquire new customers	Business Services	Service
<input type="checkbox"/>	Goods receipt	Business Services	Service
<input type="checkbox"/>	Navigation Sales	Business IT-Services	Service
<input type="checkbox"/>	Navigation Logistics	Business IT-Services	Service
<input type="checkbox"/>	DSSP02	Operating Systems	Servers
<input type="checkbox"/>	DSFS02	Operating Systems	Servers
<input type="checkbox"/>	SHUX0001	Operating Systems	HP-UX
<input type="checkbox"/>	Virtualisation	Private Cloud	Computer Reso...
<input type="checkbox"/>	Cluster	Private Cloud	Hosts
<input type="checkbox"/>	sex10.dsra.local	Private Cloud	Hosts
<input type="checkbox"/>	sex13.dsra.local	Private Cloud	Hosts



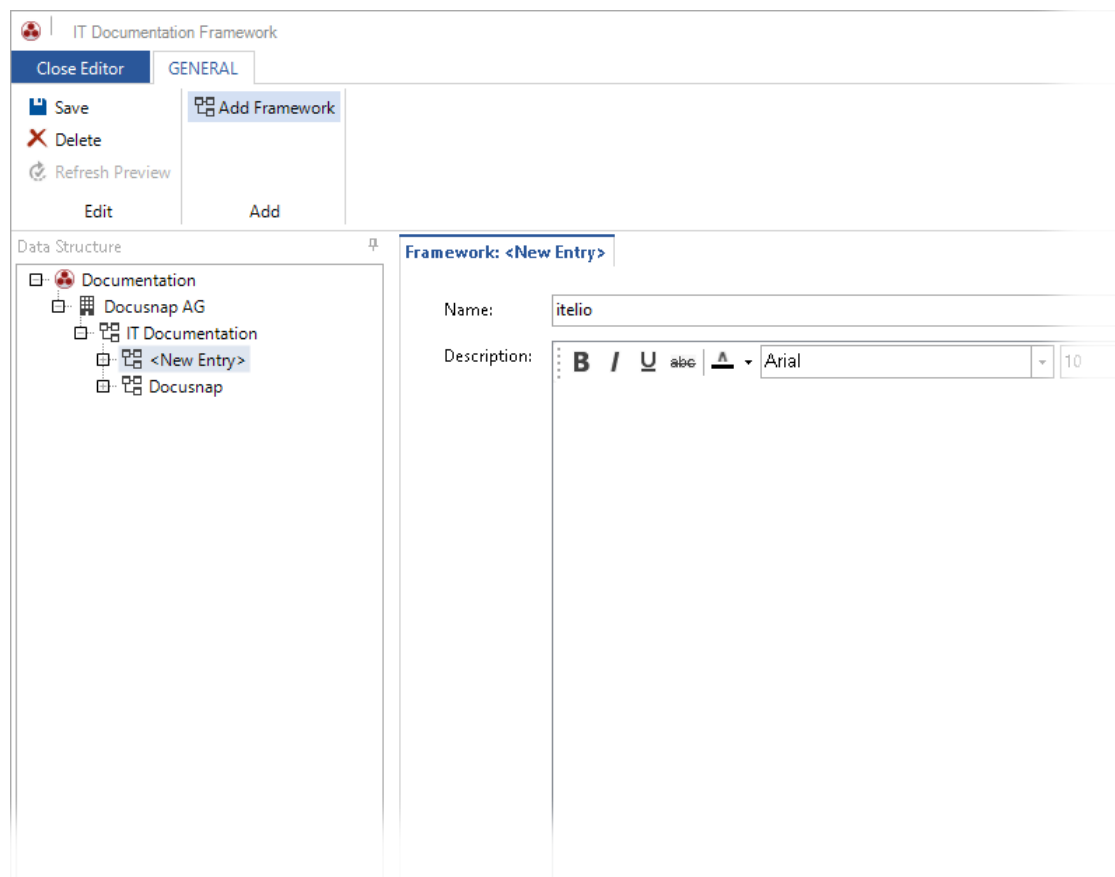
Creating a new framework

The first step in creating the documentation is to create a new framework. This is the top level of this documentation. This can be applied in two ways. Either directly in the tree or via the editor.

If the *IT documentation* heading is selected in the *Documentation* tree, a framework can be created for the respective company. Click the *New* button to open the data entry screen. Once a name has been assigned to the framework, it can be created by clicking the *Save* button.

Alternatively, all objects can be created via the editor from the beginning.

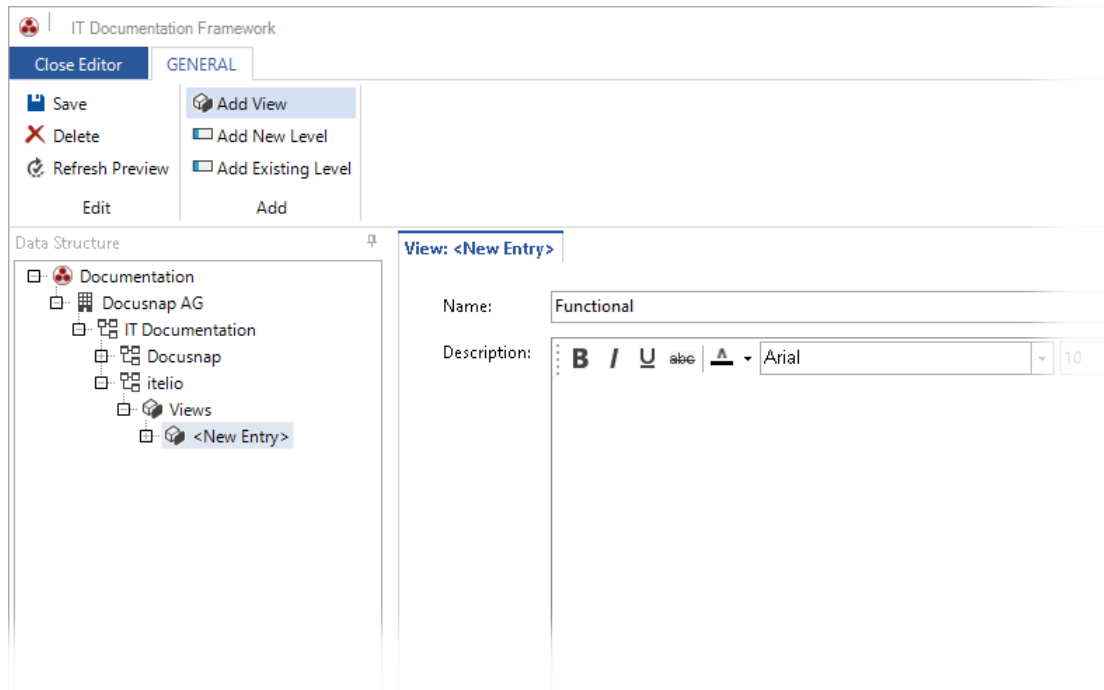
After the *IT Documentation* heading is selected, the *IT Documentation* ribbon is displayed. By clicking on the button *Editor*, a separate window is opened and a new framework can be created using the *Add Framework* button.



Create views

Again, a new view can be created directly from the *Documentation* tree or from the editor.

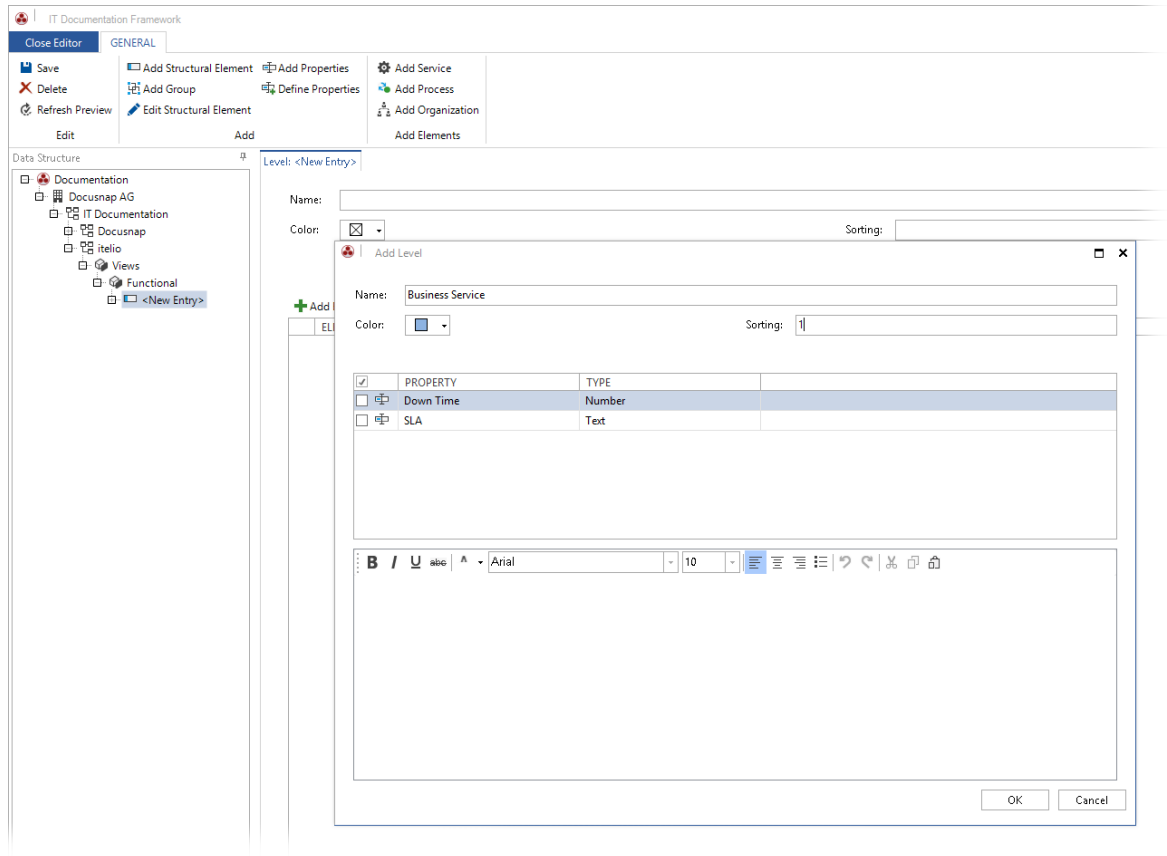
In the editor, the *Views* node must be selected for the respective framework, and then click the *Add View* button in the ribbon. A name for the new view must be entered in the data entry screen and then click on the *Save* button.



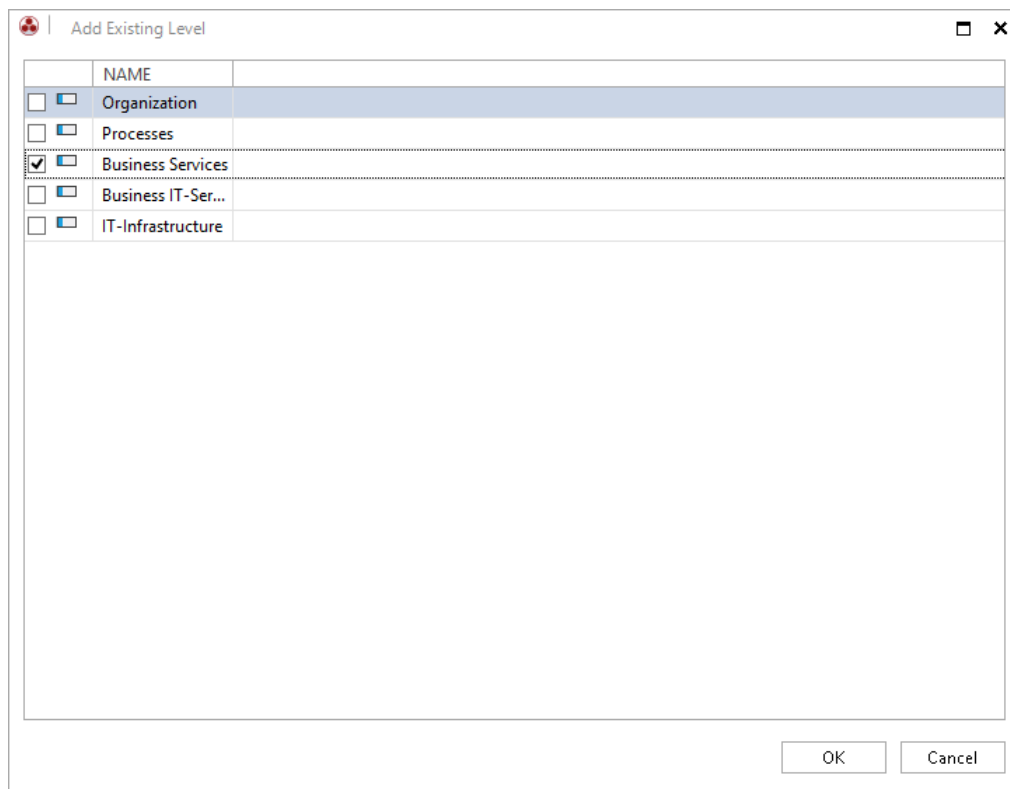
Create levels or add existing levels

Levels can only be created in the editor. However, once created, they can be edited in the documentation tree.

In the editor, a created view is selected in the data explorer and a new level is created by clicking the *Add New Level* button. In addition to the name, a color can also be selected for the level, which will be used in the visualization. Use the *Sorting* field to specify the order in which they are to be listed, starting with the value 1. It is recommended to use 10-step steps instead of 1-step steps for sorting. In case of re-sorting this makes it easier, if there are multiple levels. When a property is selected, this value can be set for all elements associated with this level.

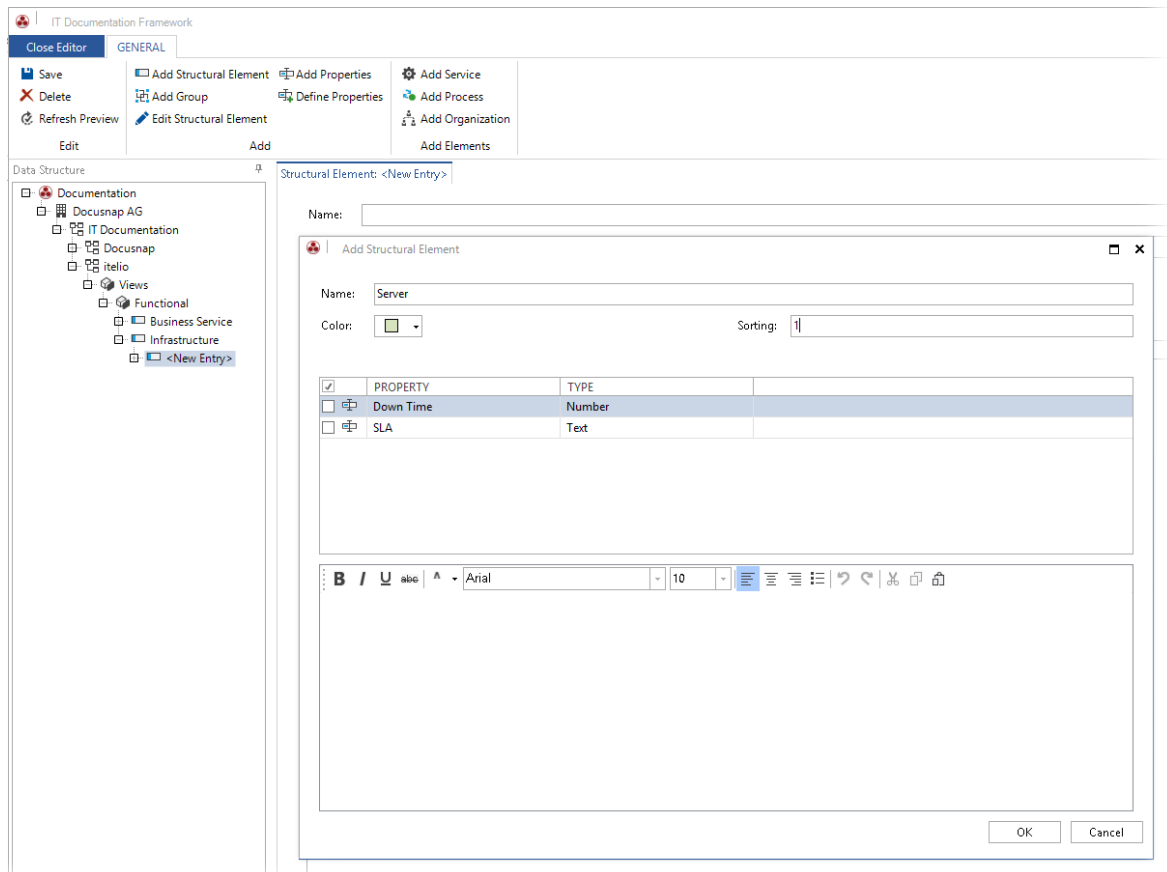


If levels have already been created in another view, these levels can also be assigned to the currently selected view using the *Add Existing Level* button.



Create structural elements

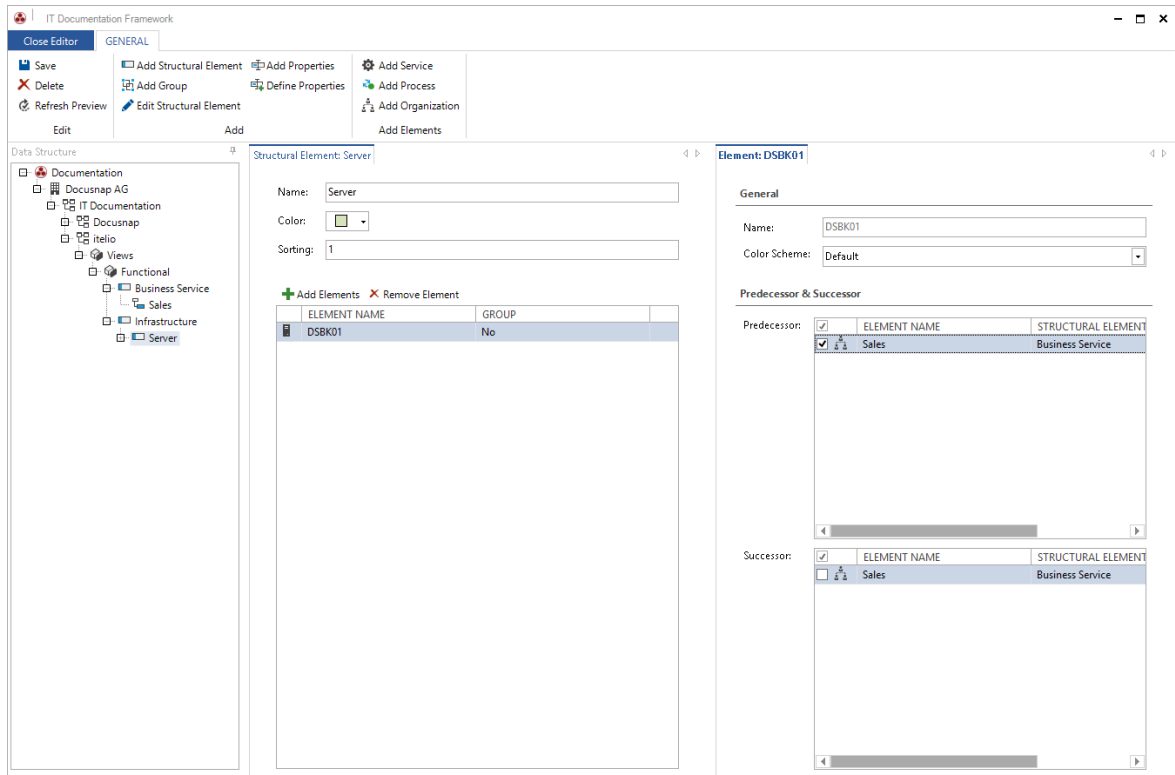
Levels can be divided into structural elements. The structural elements can also contain additional structural elements. Once a level or a structural element has been selected, a new structural element can be created by clicking the *Add Structural Element* button. As with levels the output in the map is defined by the color and the sorting. If a property is selected, it can be specified for all elements of this structural element.



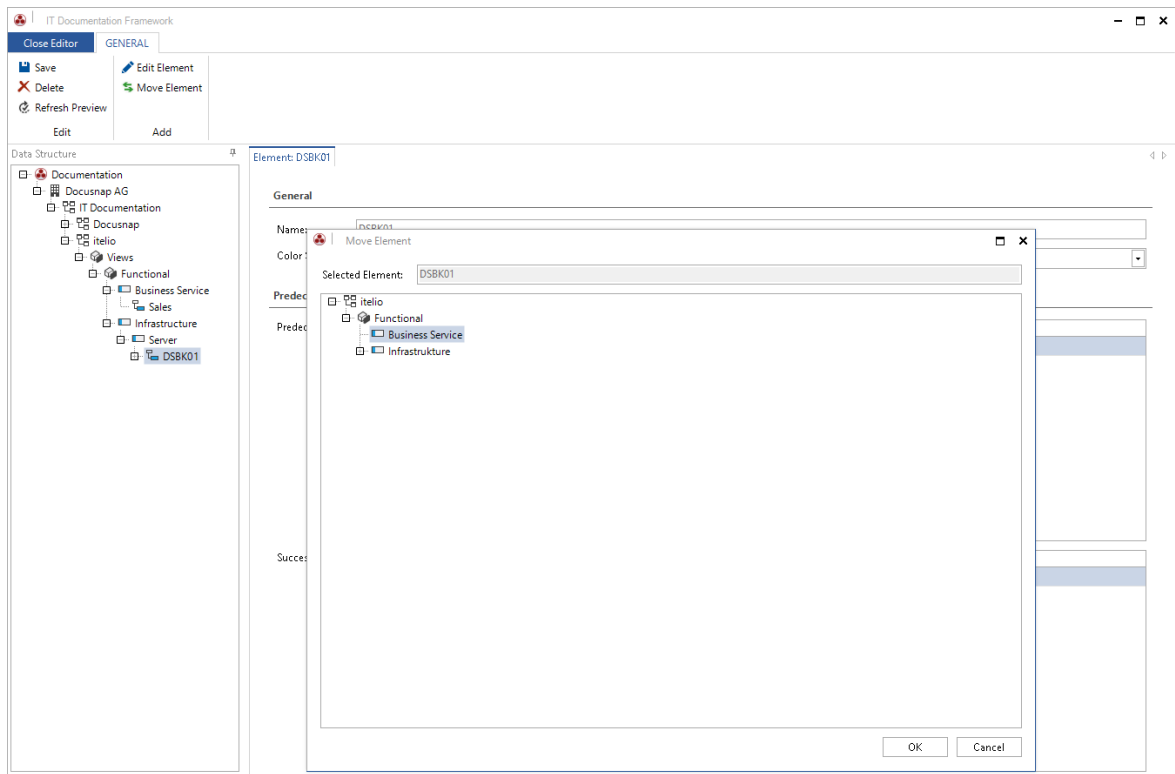
Add, link, and move elements

The *Add Elements* button opens a window where you can select inventoried or already manually created items from the *Inventory* tree. These are added to the level or the structural element that has just been selected. If you want to assign elements to a different level later, they can be moved.

In order to display dependencies, the elements must still be linked to one another. To do this, the corresponding element must be selected and the predecessors or successors selected in the right pane. Depending on whether an element indicates that it has a predecessor or successor, the arrow direction of the link arrow changes.



If it is determined that an element should be listed at a different level, it can be reassigned by the *Move Element* function. To do this, first select the appropriate element in the tree and click the *Move Element* button in the ribbon. In the window *Move Element* you can select the level, the structural element or the group into which the element should be moved.



When elements are added and then the original object is deleted, the elements in the level still exists. If these elements are also to be deleted, they must be deleted from the IT documentation.



Some objects can be moved in the data explorer. For example, systems that are moved to another domain, systems that are changed from offline host to Windows systems, or IT assets that are placed in a different folder.

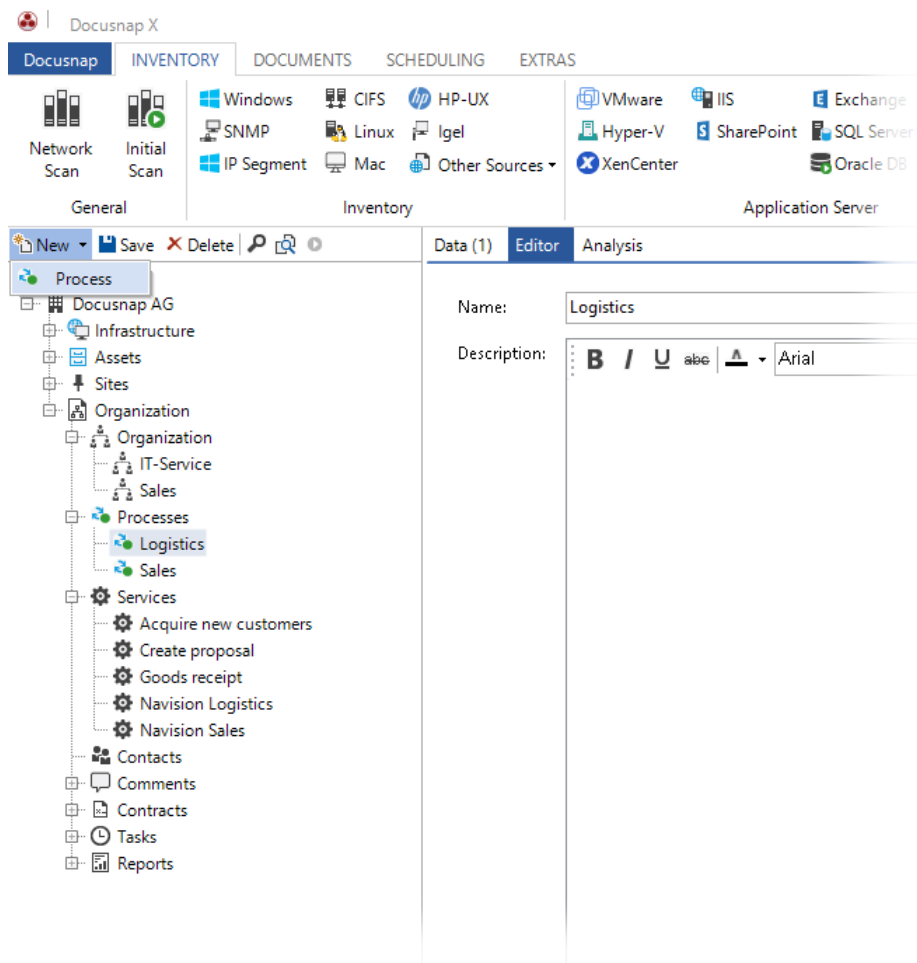
After an object has been added as an element, it is deactivated in the *Add Elements* dialog so that it can't be added again. By moving the object, it is no longer linked with the IT documentation and the object remains active in the *Add Elements* dialog therefore the same object can be added a second time.

Service, process and organization

Not all elements that are required for the modeling of the business structures can also be obtained with the inventory. Therefore, service, process, and organizational elements can be created manually. These elements can be created in the editor if a level or a structural element has been selected in the tree. The created element is immediately assigned to the selected level or to the selected structural element.

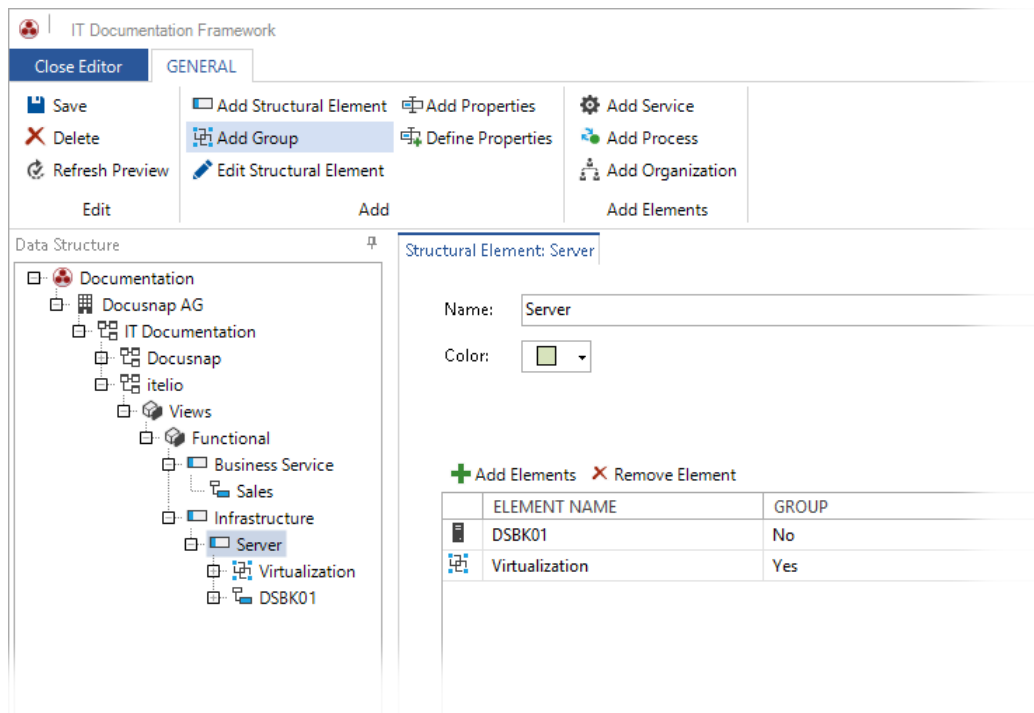
The screenshot shows the 'IT Documentation Framework' editor. On the left is a 'Data Structure' tree with nodes like 'Documentation', 'Docusnap AG', 'IT Documentation', 'Docusnap', 'itelio', 'Views', 'Functional', 'Business Service', 'Sales', 'Infrastructure', 'Server', and 'DSBK01'. The 'Business Service' node is selected. On the right, the 'Level: Business Service' panel shows fields for 'Name' (Business Service), 'Color' (blue), and 'Sorting' (1). Below these fields is a table with columns 'ELEMENT NAME' and 'GROUP'. The table contains one row: 'Sales' with 'No' in the 'GROUP' column. Above the table are buttons for '+ Add Elements' and '- Remove Element'. A red box highlights the 'Add Service', 'Add Process', and 'Add Organization' buttons in the top right corner of the editor.

The service, process and organizational elements are also listed in the inventory tree below the heading *Organization* for the respective heading. The elements can also be created and edited at these nodes. They can then be used in the IT Documentation Framework.

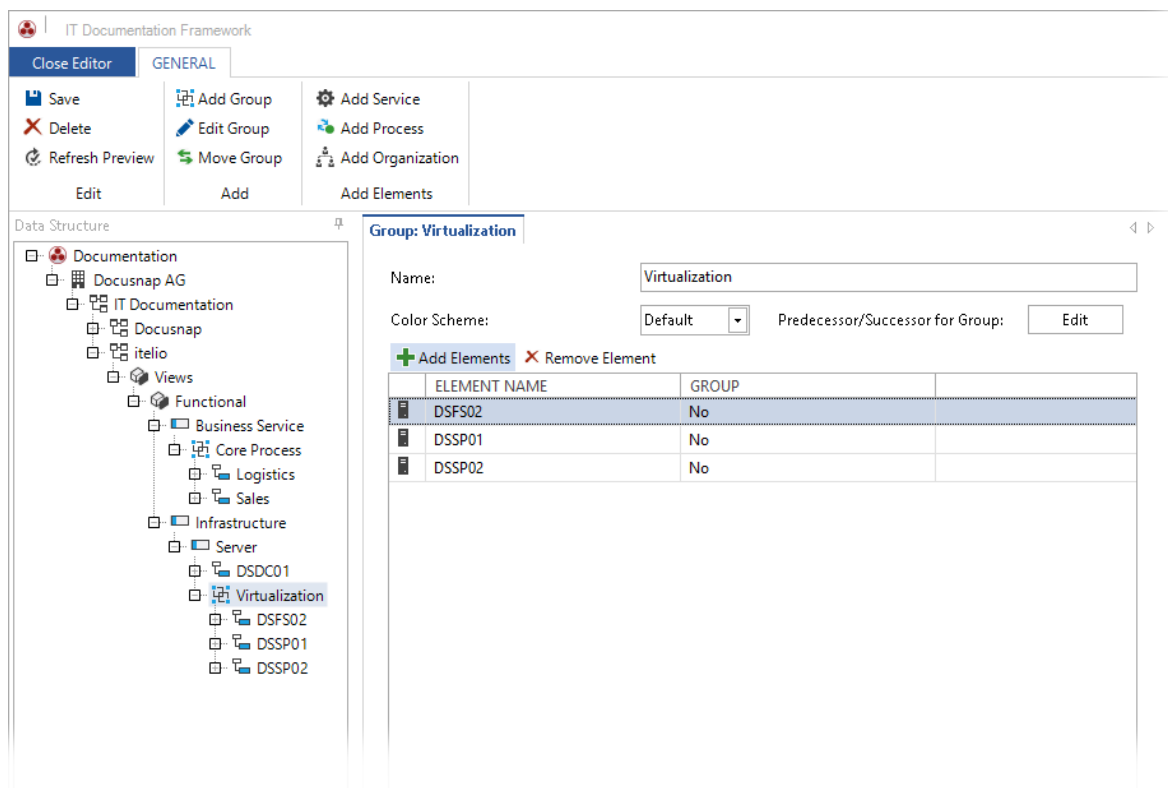


Create and link groups

Groups can be created within levels and structural elements to better organize elements. Clicking the *Add Group* button opens the window for creating a group.



After the group has been created, elements can be added. If already created elements are to be added to a group, they can be moved to the desired group using the *Move Elements* button after the element has been selected.



It is possible to define the links between the individual elements, between an element and a group or a group and a group. Clicking on the *Predecessors/Successors for Groups Edit* button opens a window to select the

objects to which this group should be linked. You can select elements or groups. By clicking the *Edit Group* button, the group can be opened for editing. In this window the links of the group can also be adjusted.

The screenshot shows the IT Documentation Framework editor interface. On the left is the 'Data Structure' tree with a hierarchy: Documentation > Docusnap AG > IT Documentation > Docusnap > Views > Functional > Business Service > Core Process > Virtualization > DSFS02. The main area is divided into two panes. The top pane, 'Group Virtualization', shows a table with columns 'ELEMENT NAME' and 'GROUP'. The bottom pane, 'Visualization', shows a diagram where 'Sales' and 'Logistics' (under 'Core Process') point to a 'Virtualization' box containing 'DSFS02', 'DSSP01', and 'DSSP02'. To the right, the 'Element: DSFS02' properties window is open, showing 'General' (Name: DSFS02, Color Scheme: Default), 'Properties' (Down Time), and 'Predecessor & Successor' tables.

	ELEMENT NAME	GROUP
	DSFS02	No
	DSSP01	No
	DSSP02	No

	ELEMENT NAME	STRUCTURAL ELEMENT	OBJE
Predecessor:	Core Process	Business Service	
	Logistics	Business Service	Proce
	Sales	Business Service	Proce
	Virtualization	Server	
	DSSP01	Server	Serve
	DSSP02	Server	Serve
	DSDC01	Server	Serve

	ELEMENT NAME	STRUCTURAL ELEMENT	OBJE
Successor:	Core Process	Business Service	
	Logistics	Business Service	Proce
	Sales	Business Service	Proce
	Virtualization	Server	
	DSSP01	Server	Serve
	DSSP02	Server	Serve
	DSDC01	Server	Serve

12.3 Properties

Properties can be defined for levels and structural elements. This makes it possible to define different kinds of information for these objects. The value can then be specified for each element of the respective level or structural element.

Define Properties

The properties are not created for a specific company. Therefore, the property can be used in any IT documentation framework, regardless of which company it is in.

The properties can be defined in the Docusnap Management or in the Editor.

In the editor, a level or a structure element is selected in the data structure and the *Define Properties* button is clicked on the ribbon. A new window opens. There you enter a name for the property, the desired field type and a name in German and English. It is also possible to choose whether it is a mandatory field. For more information on the types of properties, see the Configuration Manual.

Define Properties

Name: ☒ Active

Type: ☐ Mandatory

Factor: Number Format:

Text German:

Text English:

NAME
xSLA
<New Property>

Assign property a level or a structural element

When you create or customize levels and structural elements, the properties can be assigned. You can also use the *Add Properties* button to assign properties to the selected node (level or structural element). This automatically adds this property to all elements that are assigned to the level or the structural element and can be assigned a value. If this is a mandatory field, a value must be given before the item can be stored.

Edit Level



Name:









Infrastructure

Color:

Sorting:

10

<input checked="" type="checkbox"/>	PROPERTY	TYPE	
<input checked="" type="checkbox"/> 	Down Time	Number	
<input type="checkbox"/> 	SLA	Text	

B / U abc ^ Arial 10        

OK

Cancel

After the property is assigned to the level or to the structural element, this value is displayed for all the assigned elements.

IT Documentation Framework

Close Editor

GENERAL

Save

Delete

Refresh Preview

Edit

Edit Element

Move Element

Add

Data Structure

Documentation

DocuSnap AG

IT Documentation

DocuSnap

Itelio

Views

Functional

Business Service

Infrastructure

Server

DSBK01

Virtualization

Element: DSBK01

General

Name:

DSBK01

Color Scheme:

Default

Properties

Down Time:

Predecessor & Successor

Predecessor:

<input checked="" type="checkbox"/>	ELEMENT NAME	STRUCTURAL ELEMENT	OBJECT NAME	
<input checked="" type="checkbox"/>	Sales	Business Service	Organization	
<input type="checkbox"/>	Virtualization	Server		
<input type="checkbox"/>	DSFS02	Server	Servers	
<input type="checkbox"/>	DSSP01	Server	Servers	
<input type="checkbox"/>	DSSP02	Server	Servers	

Successor:

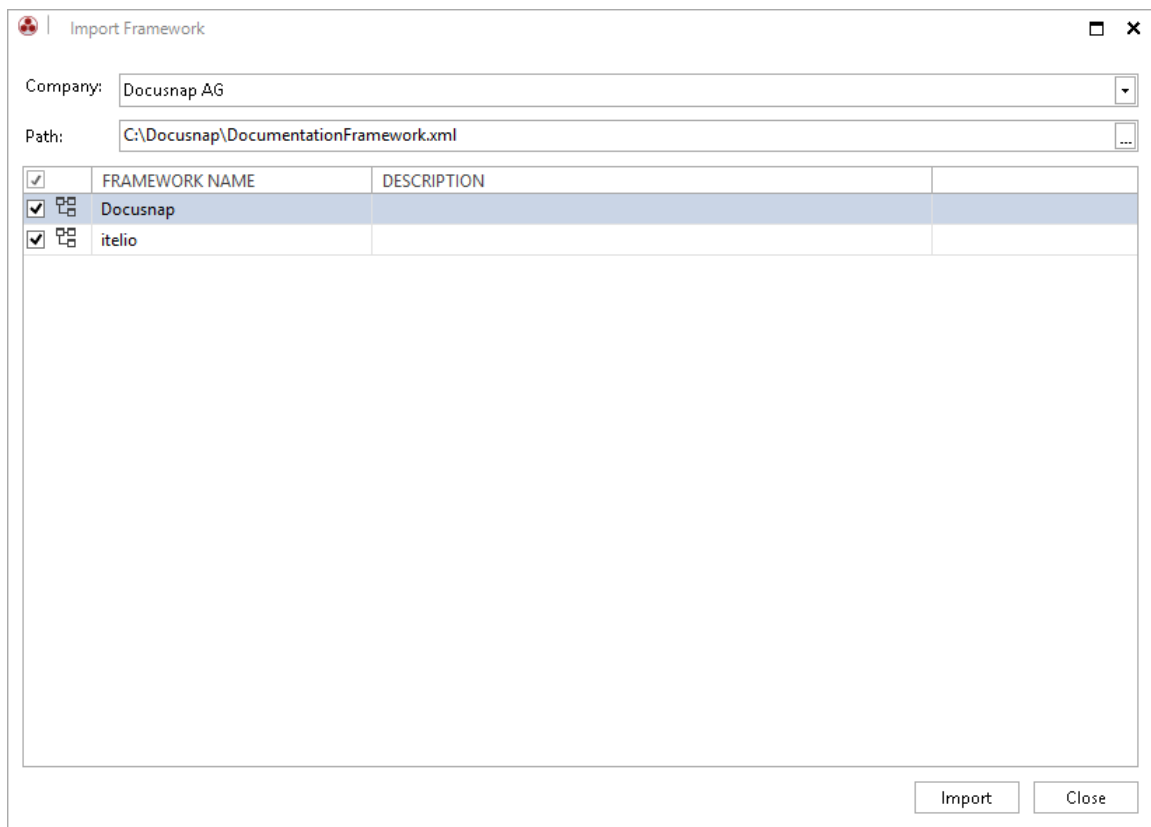
<input checked="" type="checkbox"/>	ELEMENT NAME	STRUCTURAL ELEMENT	OBJECT NAME	
<input checked="" type="checkbox"/>	Sales	Business Service	Organization	
<input type="checkbox"/>	Virtualization	Server		
<input type="checkbox"/>	DSFS02	Server	Servers	
<input type="checkbox"/>	DSSP01	Server	Servers	
<input type="checkbox"/>	DSSP02	Server	Servers	

12.4 Import and Export

Once created frameworks can be exported and imported into other Docusnap installations. Only the structure is exported, which contains the views, the levels and the structural elements. The added elements and groups are not exported. To display the *IT Documentation* ribbon, select the *IT Documentation* heading or one of the underlying nodes.

Import Framework


Clicking the *Import Structure* button opens the import dialog. For the import, the company must be selected into which the framework should be imported. In the *Path* field, select the file into which the framework was exported. Then select which frameworks you want to import. Click on the *Import* button to import the desired frameworks.



	FRAMEWORK NAME	DESCRIPTION
<input checked="" type="checkbox"/>	Docusnap	
<input checked="" type="checkbox"/>	itelio	

Export Framework

Clicking the *Export Structure* button opens the export dialog. When exporting, you must select from which company the frameworks are to be exported. Use the *Path* field to choose where the file should be stored. Once the desired frameworks have been selected, they can be exported by clicking the *Export* button.

 Export Framework



Company:

Docusnap AG

Path:

C:\Docusnap\DocumentationFramework.xml

...

<input checked="" type="checkbox"/>	FRAMEWORK NAME	DESCRIPTION
<input checked="" type="checkbox"/> 	Docusnap	
<input checked="" type="checkbox"/> 	itelio	

Export

Close



Part



13 IT Assets

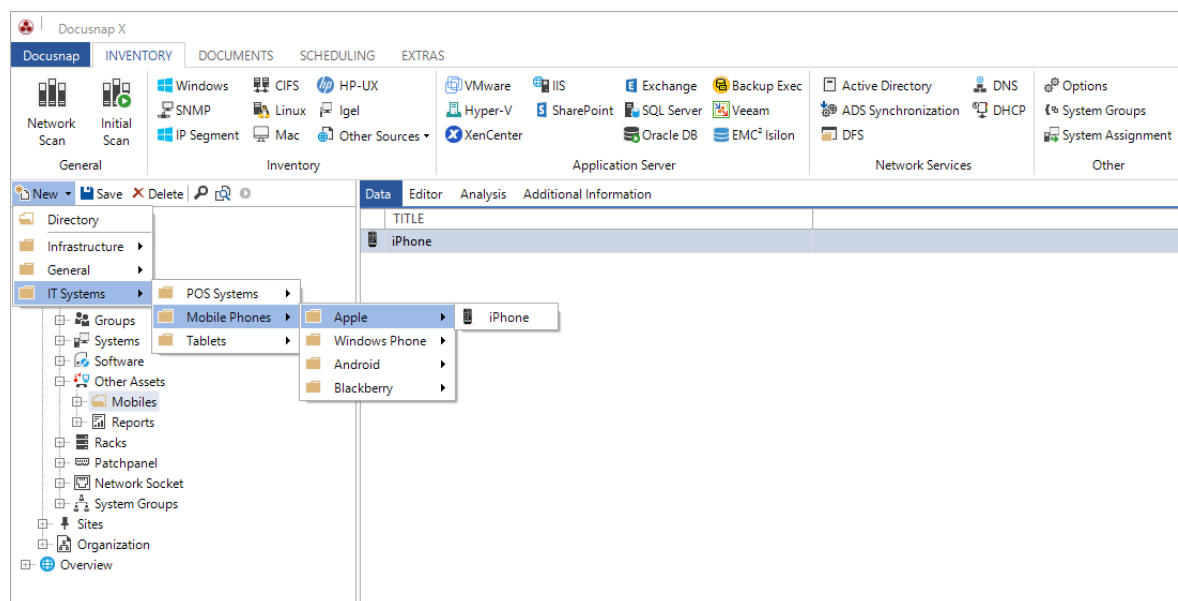
Using the IT Assets functionality, it is possible to inventory systems which cannot be scanned automatically by Docusnap. This can be done manually or by [data import](#).

Docusnap comes with different predefined IT asset types. They can be extended and added to, as required, by creating additional types or classes with minimum effort. Docusnap generates the required data entry screens automatically.

The different IT assets can be embedded into concepts, diagrams, reports, and maps.

13.1 Create IT Assets

IT assets are created from the *Inventory* tree view. In the first step, create a directory under the *IT Assets* heading. Then, you can create the IT assets under this directory by clicking the *New* button and selecting the desired category. It is possible to clone existing IT assets. When you clone an IT asset, all values except the value defined for the display field will be copied.



In addition to creating IT assets manually, you can import the content of CSV files as IT assets using the [Data Import](#) feature.

Under the *IT Assets* heading in the tree structure, you can open the Reports node where two reports are displayed which list the values of the IT assets.

Part

XIV

14 IT Correlation

IT Correlations are used to visualize and evaluate IT relationships between IT objects and can be accessed by using the drill-down function.

The correlations between the IT objects are defined in Docusnap Management. To identify the connection between two objects, the *IT Correlation* is defined between selected values of these objects. Then the possible *IT Correlations* are displayed, if matching objects are found for the definition.

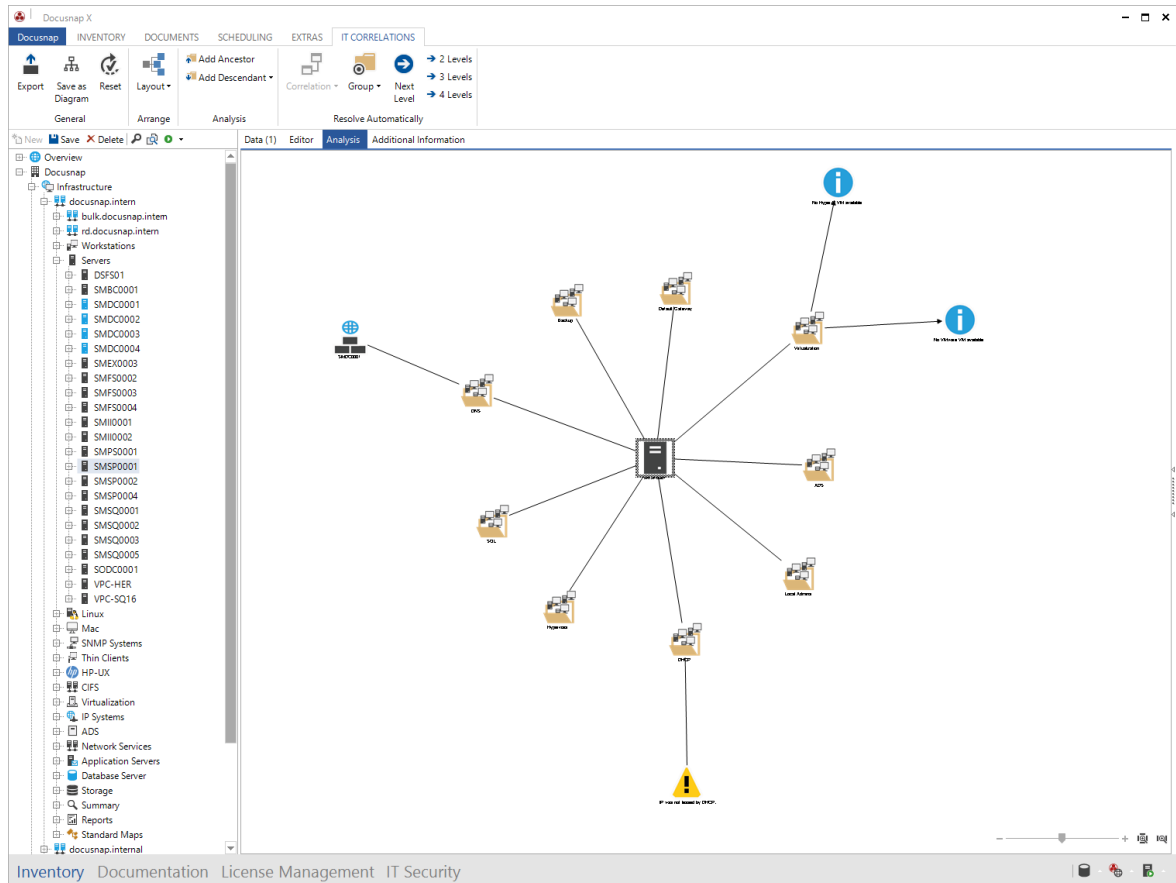
The *IT Correlations* are displayed in Docusnap in the *Analysis* tab if, for the selected object, a correlation is found. From this object, the user can start the evaluation of any or all *IT Correlations*.

For example, a correlation between the inventory workstations and virtual machines in the VMware, or between the Active Directory users and mailboxes on the Exchange server, are defined. Several definitions of IT Correlations are already included in Docusnap.

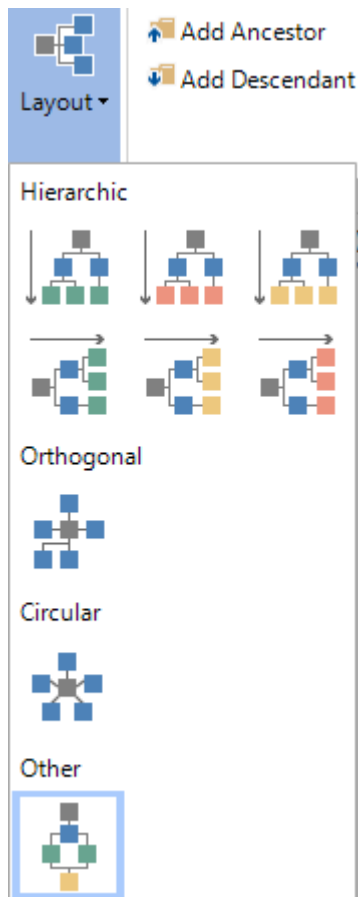
14.1 Using IT Correlation

Every *IT Correlation* has a start object. For this object all the correlating objects are displayed. If for the selected object an *IT Correlation* is defined, the corresponding objects are displayed in the *Analysis* tab. Additional to the directly dependent objects further *IT Correlations* can be shown.

Use the context menu of the object or the *IT Correlations* ribbon to resolve IT Correlations or groups of the object. Additionally, hierarchical ancestors and descendants of the objects can be added. Via the *Level* buttons in the ribbon and the entry *Resolve* context menu you can determine how many levels of IT Correlations should be displayed. This drill-down functionality simplifies the analysis, since you can work through layer by layer.



Depending on the selected algorithm the arrangement of the objects changes accordingly.



Click the *Export* button to export the IT Correlations and the added relations into a file.

14.2 Create IT Correlation

The IT Correlations are configured in [Docusnap Management](#) in the *IT Correlations* ribbon. Click the *Relations* button to open the tabs to define IT Correlations.

IT Correlations

You can create new IT Correlations or alter existing ones.

Click the *New* button to create a new IT Correlation. Every IT Correlation has a name and a description in German and English. Every IT Correlation can be defined by what kind of relationship it is. For different types of relationships, different line formats and colors are used.

Every IT Correlation has a start object (Start Type) and a result object (Result Type). These two objects are compared according to the defined filter.

Filter

In the filter, the IT Correlation is defined. In the *Field* column, all the tables and columns of the selected starting object and the hierarchical parent and child objects are displayed. In the *Value* column, all the tables and columns of the selected result object, as well as the hierarchical parent and child objects, are available for selection.

The selected columns in the *Field* column are used for the comparison, e.g. column *ObjectPath* of the table *tADSOject*. In the *Value* column, the column is chosen which identifies the result object to be compared with, for example, the column *ObjectIdentity* of the table *vExchangeMailboxRec*. In this example for each Active Directory user account the corresponding Exchange mailboxes are displayed.

Use the *Operator* column to define the desired relation between startup type and result type.

The comparison of the data does not take domains and companies into consideration. If the filter compares only the name and not the corresponding ID, then objects from other companies or domains could be accidentally displayed as IT Correlations. In this case you should include a filter, which compares the DomainID or the AccountID of the relevant tables.

The filter conditions can be grouped and linked with either *And* or *Or*.



If you want to display workstations and servers as IT correlations for an object two IT Correlations have to be defined. One relation for workstations and one for servers.

The IT dependencies are defined in one direction, from the start to the result object. To display the start object at the result object, an additional IT Correlation must be defined that shows this relation.

Conditional Message

Use conditional messages to define how many result objects should be found. When the condition is true, then the icon and the defined message will be displayed in the diagram of the IT Correlation.

Check the checkbox *Activate Message* to create a message for the IT Correlation. You can define if the number of result objects should be greater than, less than or equal to the specified value to display the message. Select in the field *Message Type* which icon (Info, Warning, Error) should be displayed with the message. For every message you can enter an English or German text.



The screenshot shows the 'IT CORRELATIONS' tab in the Docusnap Management interface. The 'Correlations' section on the left lists various IT assets, with 'Srv_SQL_Server' selected. The 'General' tab for this correlation shows the following details:

- Name:** Srv_SQL_Server
- Relation:** Default
- German Text:** Srv_SQL_Server
- English Text:** Srv_SQL_Server
- Start Type:** Servers
- Result Type:** SQL Servers

Buttons for 'New', 'Delete', and 'Save' are present. A list of IT assets is shown on the left, including SQL_Server_DB, Srv_Backup, Srv_DHCP, Srv_DNS, Srv_GW, Srv_Hypervisor_Hyper-V, Srv_LocalAdmin_Usr, Srv_OU_ADS, Srv_SQL_Server (selected), Srv_VM, Srv_VM_HyperV, Srv_VM_VMware, Svc_2_Server, Svc_2_Wks, and Usr_2_Exchange.

The 'Filter' section on the right shows a table with columns: AND/OR, FIELD, OPERATOR, and VALUE. The current filter is: **AND/OR** (checkbox), **FIELD** (tHosts.HostName), **OPERATOR** (Contains), **VALUE** (tSQLServer.Name).

The 'Conditional Message' section shows:

- ☒ **Activate Message**
- Message Type:** Information
- Show Message if Results are:** = 0
- German Text:** Keine SQL Server Instanz vorhanden oder inventarisiert
- English Text:** No SQL Instance available or inventoried

Group

Groups are used to group multiple IT Correlations. Thereby the diagram in the *Analysis* tab will be less crowded. IT Correlations which have the same start object can be grouped together.

The screenshot shows the 'Groups' tab in the Docusnap Management interface. The 'Gruppen' section on the left shows the following details:

- Name:** ADS_Srv
- Text Deutsch:** ADS
- Text Englisch:** ADS

Buttons for 'Neu', 'Löschen', and 'Speichern' are present. A list of IT assets is shown on the right, including SQL_Server_DB, Srv_Backup, Srv_DHCP, Srv_DNS, Srv_GW, Srv_Hypervisor_Hyper-V, Srv_LocalAdmin_Usr, Srv_OU_ADS (checked), Srv_SQL_Server, Srv_VM, Srv_VM_HyperV, Srv_VM_VMware, Svc_2_Server, Svc_2_Wks, Usr_2_Exchange, Usr_2_SQLLogin, Usr_2_SrvSvc, Usr_2_SrvSvc, Usr_2_WksSvc, Usr_2_WksSvc, Usr_OU_ADS, and VMware_Cluster_Host.

Export / Import Definitions

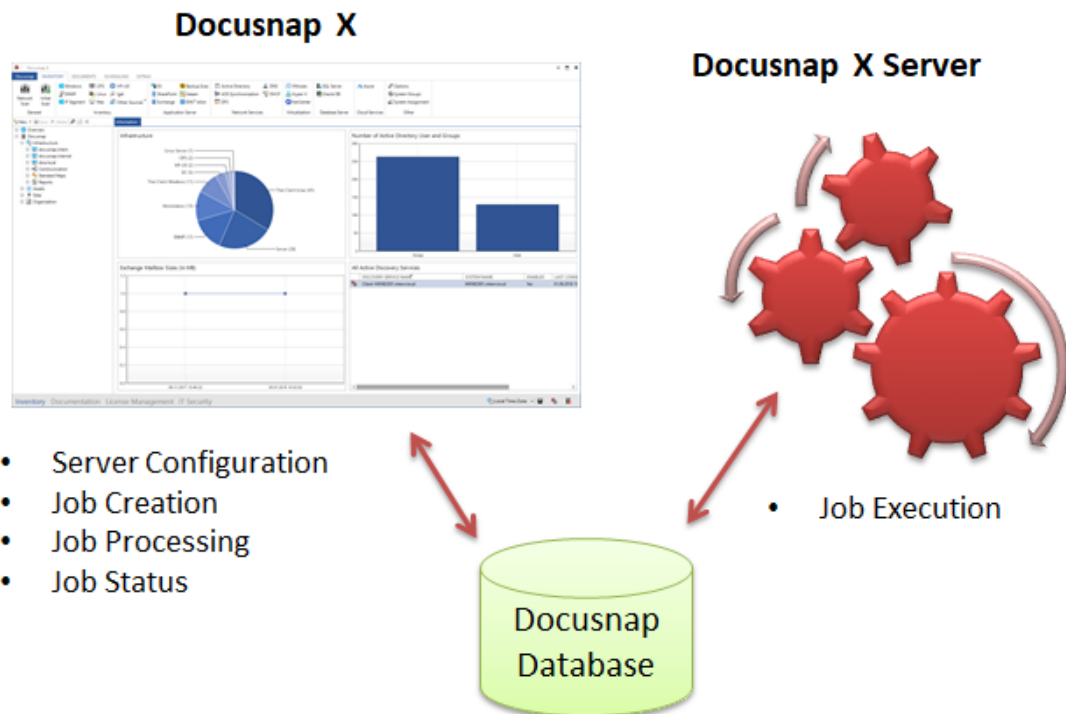
Click the *Export Definition* button to export the IT Correlations to a file. Firstly, this is to secure the user-defined IT Correlations. Secondly, they can be imported into another Docusnap installation later. This is especially interesting when different IT networks and thus different Docusnap installations are in use. Click the *Import Definition* button to import the IT Correlations from a file. In this way, once defined IT Correlations can easily be reused elsewhere.

Part



15 Docusnap Server

The server component of Docusnap allows you to fully automate processes, such as creating an inventory or the associated documentation. This section explains the underlying concept and the configuration of Docusnap Server.



Docusnap

To create, process or monitor jobs, you will use the Docusnap application. The Scheduling step is available in the wizards (see [Scheduling](#)). In the *Scheduling* step, you can schedule the automated execution of the current inventory or documentation job for later or repeated execution. The jobs will be saved in the Docusnap database and are immediately available for execution by the Docusnap Server.

The *Job Management* dialog allows you to edit, monitor, delete and, if necessary, start the scheduled jobs (see [Job Management](#)).

Docusnap Server

The Docusnap Server is installed as a Windows service and is therefore the central element for the timed execution of scheduled jobs. The Docusnap Server can be configured using the [Configuration wizard](#) in Docusnap. The Docusnap server can also be configured during the first start Docusnap. The configuration wizard can also be launched from the *Configuration* button in the *Scheduling* ribbon during operation.

As already described previously, the jobs are configured, scheduled and saved in the Docusnap database. The jobs will be loaded by the Docusnap Server upon startup or during normal operation and executed as scheduled.



By default, the Docusnap Server service will be installed using the local system account. At this point, make sure that the specified account has sufficient access rights to the SQL Server, since otherwise, the Docusnap Server service cannot be started.



The Docusnap Server can only be used, if a SQL Server database is selected. The use of the local database (Microsoft Server Express LocalDB) is not supported.

15.1 Configuration

Click the *Configuration* button in the *Docusnap Server* group of the *Scheduling* ribbon to open the configuration dialog for the Docusnap Server.

Server Start Settings

Select the startup type *Manual* or *Automatic* for the service in the *Server Start Settings* step.

In addition, you can turn on the debug mode for the Docusnap Server here.

By default the service runs under the system local account. To ensure the connection to the database, it is recommended to provide a SQL Server Authentication in the wizard step *Server Database*.



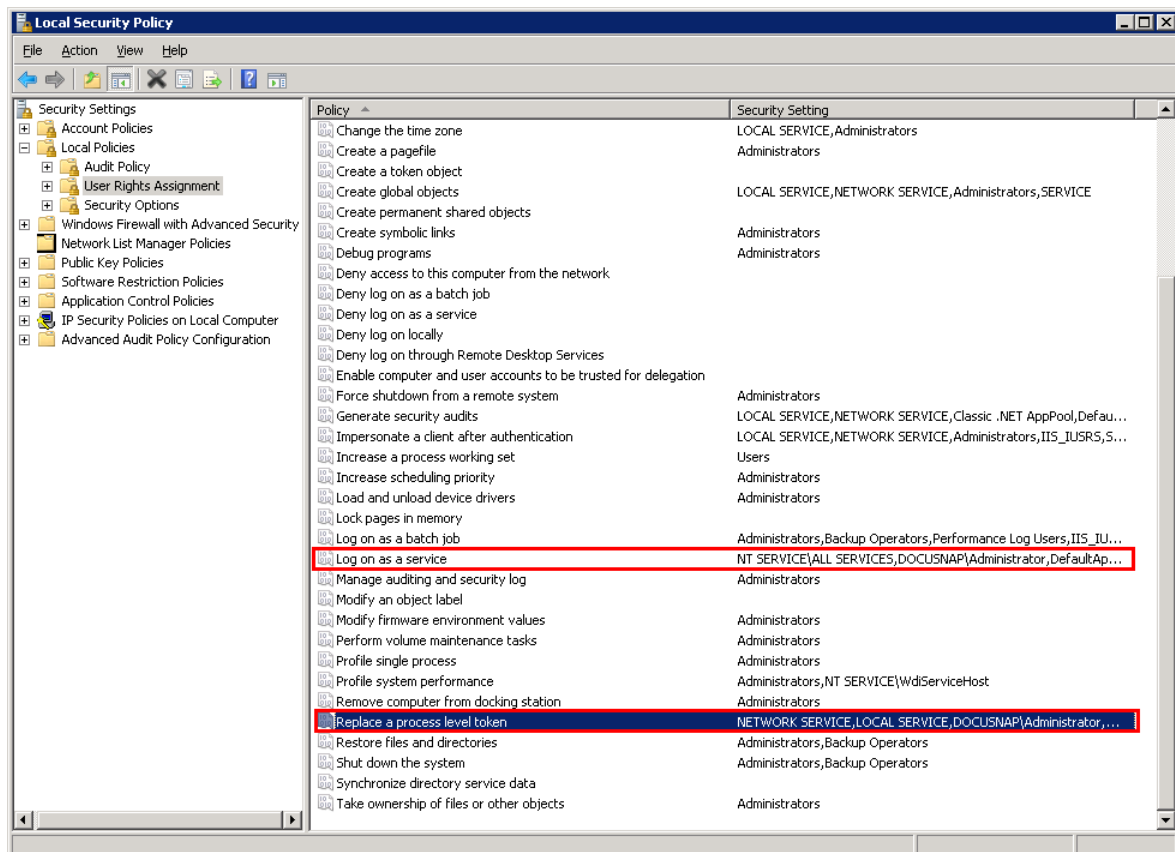
It is also possible to specify a user, who is used for the execution of the service.



In order to execute a correct inventory, the local security policies *Replace a process level token* and *Log on as service* must be set for the specified user, if a specified user is defined.

Check the checkbox *Execute Inventory in Own Process* to confirm that the security policy has been set.

If a user is entered, but the local security policy has not been set or the checkbox has not been checked, than several inventory processes might not be executed correctly.



Server Database

The Docusnap database is the key element for performing the jobs. It holds the jobs to be processed by the Docusnap Server.

Only one Docusnap server is defined for each database. If an active Docusnap server of another system is already registered in the database, the Docusnap server will not be started at the end of the wizard. In this case only the defined settings are saved.





By default, the Docusnap Server service will be installed using the local system account. At this point, make sure that the specified account has sufficient access rights to the SQL Server, since otherwise, the Docusnap Server service cannot be started.

By default, the timeout for database queries is 30 seconds. For large databases, however, it may happen that database queries take longer. To execute these queries nonetheless, the query timeout can be increased.



The change of the Timeout will be stored in a configuration file located on the computer where Docusnap is running and will be used for every connection to a database.

Server Mail Settings

Docusnap provides notifications for particular occasions, e.g. when a contract has expired. These notifications are sent out by e-mail.

In the SMTP Settings group, you can enter the SMTP server data and select additional options for authentication and SSL encryption. If the SMTP server requires authentication, the *User* and *Password* text fields will be enabled so that you can enter the required information.

If the *Simple Authentication* check box is activated, no separate domain information is used in the credentials. This setting is necessary for external email providers

because the domain information is not required for user authentication with external providers. For specific Exchange configurations, domain information may also not be required. If checking the settings for Exchange fails, it may be that sending emails work by activating the *Simple Authentication*.

After you have entered a value in the *SMTP Server* or *User* field, click the *Check Settings* button to send an e-mail to a test recipient to verify the e-mail settings specified here. Only if this test was successful, the *Next* button will be enabled so that you can go to the next step.

If you do not want to use the e-mail settings, leave the corresponding text fields blank or disable this step by removing the checkmark from the *Configure Email Settings* checkbox.

The screenshot shows the 'Server Configuration' window with five steps: 1. Server Start Settings, 2. Server Database, 3. Server Mail Settings (current), 4. Server API, and 5. Server Settings. The 'Configure Email Settings' checkbox is checked. Under 'SMTP Settings', the 'SMTP Server' is 'eMailServer01.docusnap.intern'. 'Server Requires Authentication' is checked, 'SSL Encryption' is unchecked, and the port is 25. Under 'Authentication', the 'User' is 'admin' and the 'Password' is masked with '****'. The 'Sender' is 'DocusnapServer@docusnap.com'. Under 'Check Settings', the 'Test Address' is 'info@docusnap.com'. At the bottom are 'Back', 'Next', and 'Cancel' buttons.

Server API

Use Discovery Service and Docusnap Web

Scheme: The authentication scheme only applies to the authentication using an web browser. If *https (self-signed certificate)* is selected, its own certificate will be created. If *https (select from certificate store)* is activated, a certificate that exists on the system can be selected using the *Select Certificate* button. For the secure connection with https, the Docusnap Server uses the cipher suite of the operating system on which the Docusnap Server is running.

External Hostname (optional) and port: These are required for accessing the Docusnap Server API within the organization. The host name is used for connecting

both to the Docusnap Discovery Services and to the Web Client.

Proxy: Inventory of Azure requires an Internet connection. If the inventory is carried out with the Docusnap Server and a proxy server should be used, the desired settings can be entered via the *Proxy* button.

Activate HTTP Security Headers: If desired, the HTTP Security Headers can be activated. As a result, however, the embedded reports, plans and documents are no longer displayed in the web client due to the higher security requirement.

Authentication Scheme (only relevant if user management is enabled)

Basic Authentication: With this method, you can to 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.

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.

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. *Anonymous Authentication* can only be used if user management is not active.

Docusnap User Permissions

Specifying a dedicated domain controller is useful when the domain controllers are spread across multiple sites. By specifying the local domain controller the response time to query the Active Directory can be reduced significantly.

Debugging Docusnap Web

In addition, the logging can be activated for Docusnap Web, which logs web requests. A path must be specified in which the logging file will be saved.

Server Configuration

1 Server Start Settings 2 Server Database 3 Server Mail Settings 4 **Server API** 5 Server Settings

☒ Use Discovery Service and Docusnap Web

Scheme: ☒ http ☐ https (self-signed certificate) ☐ https (from certificate store) Select Certificate

External Hostname (optional): Port: Proxy

http://V008:9001/

☐ Activate HTTP Security Headers

Authentication Scheme (only relevant if user management is enabled)

☒ Basic Authentication (https is recommended)

☒ Integrated Windows Authentication

☐ only NTLM

☐ Anonymous Authentication (Attention: this option grants everyone full access)

Docusnap User Permissions

Dedicated Domain Controller:


Debugging Docusnap Web

☐ Enable Logging

Logging Path: Max. Age:

Back Next Cancel

Server Settings

Use the *Documentation Path* field to specify the location where the documents (overviews and datasheets) will be stored by the Docusnap Server. Click the  button to select the folder for storing the documents.

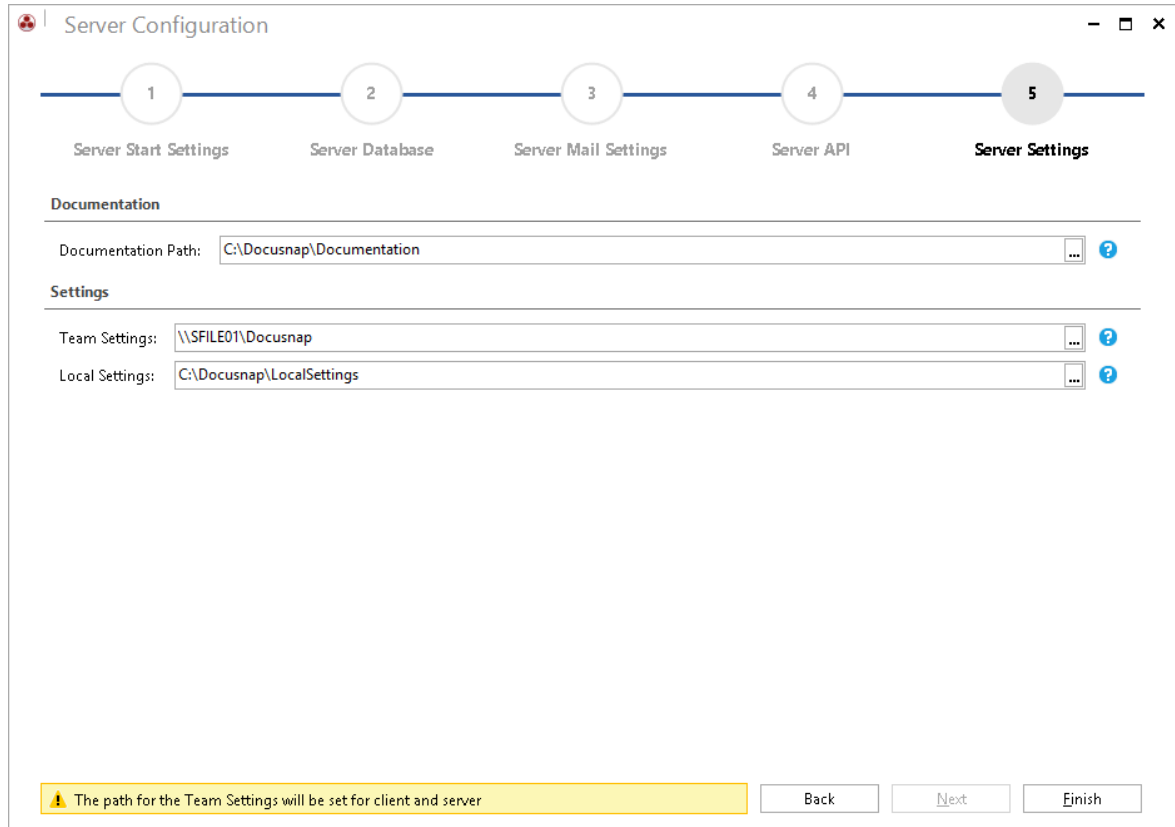
When creating the documentation, Docusnap uses the system account permissions for executing the service. For this reason, make sure that the system account has a write permission to the selected documentation path. Alternatively, you can specify a user or service account with sufficient permissions for the *Docusnap Server* Windows service.

The files and templates used by Docusnap may either be stored on the local hard disk, on a server or on another computer in the network. To obtain consistent results, the same team settings path is used for the Docusnap client and Docusnap Server. If the path is changed in the options dialog, it will be changed for the Docusnap Server and vice versa, when both are connected to the same database. If no path was selected for the *Team Settings* or if that path no longer exists, the path specified for the *Local Settings* will be used.



The *Docusnap Server* only supports UNC addresses for the path specifications to be used.

When creating the documentation, Docusnap relies on templates. During the configuration, Docusnap loads these templates into the local or team settings directory. If neither path is available at the time when the job is processed, Docusnap will use the templates from the program directory.






The screenshot shows the 'Server Configuration' window with a progress bar at the top indicating five steps: 1. Server Start Settings, 2. Server Database, 3. Server Mail Settings, 4. Server API, and 5. Server Settings (which is the active step). Below the progress bar, there are two sections: 'Documentation' and 'Settings'. The 'Documentation' section has a 'Documentation Path' field with the value 'C:\Docusnap\Documentation'. The 'Settings' section has two fields: 'Team Settings' with the value '\\SFILE01\Docusnap' and 'Local Settings' with the value 'C:\Docusnap\LocalSettings'. At the bottom, there is a yellow warning box that says 'The path for the Team Settings will be set for client and server'. To the right of the warning box are three buttons: 'Back', 'Next', and 'Finish'.

Click the *Finish* button to apply the settings and start the Docusnap Server.

15.2 Job Management




The Job Management feature in Docusnap provides advanced management options for your jobs. Click the *Scheduled Jobs* button in the *Scheduling* ribbon, to open the dialog for organizing and editing jobs.

In the *Job Management* all jobs with the most important information are listed. If a user does not have permissions to a company, the orders of that company are not displayed.

The *Delete* and *Add to the Queue* buttons allow you to manage the configured tasks. You can abort an active job by clicking the  *Cancel Job* button. To delete a job from the database, select it and click the  *Delete* button. By clicking the  *Add to the Queue* button, the selected job is added to the queue and will be executed as soon as the Docusnap Server or the DDS can process the job.

Click on the *Summary* button to open a dialog showing the results of the job. For the failed and incomplete subtasks, the error messages or justifications are

displayed in the *Information* column. The button is only active if the job has been executed at least once.

The status of the job can be determined by the used icon. Jobs with the icon  have been scheduled and will start at the next scheduled execution date. The jobs with the icon  are currently executed. The jobs with this icon  will no longer be executed. This is the case either if a job is excluded from the planning or because the job is not to be executed recurringly and the date of the one-time execution is already in the past.

The following options can be set by clicking on the button for the respective job.

- *Edit Job*: When you click the *Edit Job* button, the scheduled job will be opened in its associated wizard where you can edit it.
- *Exclude from Schedule* and *Schedule Job Again*: A click on the *Exclude from Schedule* button specifies that the job will no longer be executed. If the job should be included in schedule again, it can be reactivated by clicking the *Schedule Job Again* button.
- *Job Details*: By clicking on the *Job Details* button, the basic job and configuration data are displayed in a dialog.
- During the execution of the job, the current progress can be checked by clicking on the *Job Status* button.



Jobs can only be scheduled for the server discovery or a discovery service. Therefore the client discovery is not listed in the wizard, when the job is opened with the *Edit* button. The server discovery or another discovery service can be selected

Job Management

✕ Delete ✖ Cancel Job 📄 Summary

COMPANY

	NAME	TYPE	PREVIOUS EXECU...	NEXT EXECUTION	DISCOVERY SERVICE	COMPANY	LATEST STATUS	SCHEDULE TYPE	
✖	Docusnap								
	DNS Inventory	Inventory	08/10/2018 11:52:54		Server-V008	Docusnap	Successful	One-Time	...
☑	Windows Inventory Do...	Inventory	08/10/2018 13:52:12	15/10/2018 13:51:12	Server-V008	Docusnap	Successful	Recurring	...
✖	itelio								
🔄	Windows Inventory itelio	Inventory	08/10/2018 14:18:24	01/11/2018 08:36:49	DDS, Server-V008	itelio	Successful	Recurring	...
☑	AD Inventory	Inventory		01/11/2018 08:38:06	Server-V008	itelio	Successful	Recurring	
☑	Documentation	Documentation		01/11/2018 13:53:18		itelio	Successful	Recurring	

✎ Edit Job
🔄 Job Status
✖ Exclude from Schedule
📄 Job Details

🟢 The job has been added to the queue.

OK

Report Scheduled Jobs

In addition to the overview in the *Job Management* dialog, a list of all jobs are generated in the *Scheduled Jobs* report below the *Overview - Reports* in the *Inventory* tree. This report lists the most important data for the Jobs.

Scheduled Jobs

Type	Name	Description	Creation Date	Next Execution	Execution	Status
Documentation	Documentation	At every 1. of the month at 9:38:56 AM. Schedule will be used from 1/10/2017.	1/9/2017 9:39:10 AM	2/1/2017 9:38:56 AM	1/9/2017 10:18:13 AM	Successful
Inventory	AD Inventory	Every week on Tuesday at 8:00:00 AM. Schedule will be used from 1/9/2017.	1/9/2017 9:49:37 AM	1/10/2017 8:00:00 AM	1/9/2017 10:25:54 AM 1/9/2017 9:55:28 AM 1/9/2017 9:49:38 AM	Successful Successful Successful
Inventory	Windows	Every 2 Day(s) at 8:00:00 AM. Schedule will be used from 1/5/2017.	1/5/2017 4:32:47 PM	1/11/2017 8:00:00 AM	1/9/2017 10:30:57 AM 1/9/2017 10:10:38 AM 1/5/2017 4:32:48 PM	Successful Successful Successful
Notification	Invalid Licenses	At every 2. of the month at 10:00:00 AM. Schedule will be used from 1/9/2017.	1/9/2017 9:42:53 AM	2/2/2017 10:00:00 AM	1/9/2017 9:43:16 AM	Successful
Permission Analysis	NTFS	Every week on Monday at 8:00:00 AM. Schedule will be used from 1/9/2017.	1/9/2017 9:41:50 AM	1/16/2017 8:00:00 AM	1/9/2017 10:22:45 AM 1/9/2017 9:48:34 AM 1/9/2017 9:41:51 AM	Successful Successful Successful

15.3 Server Status

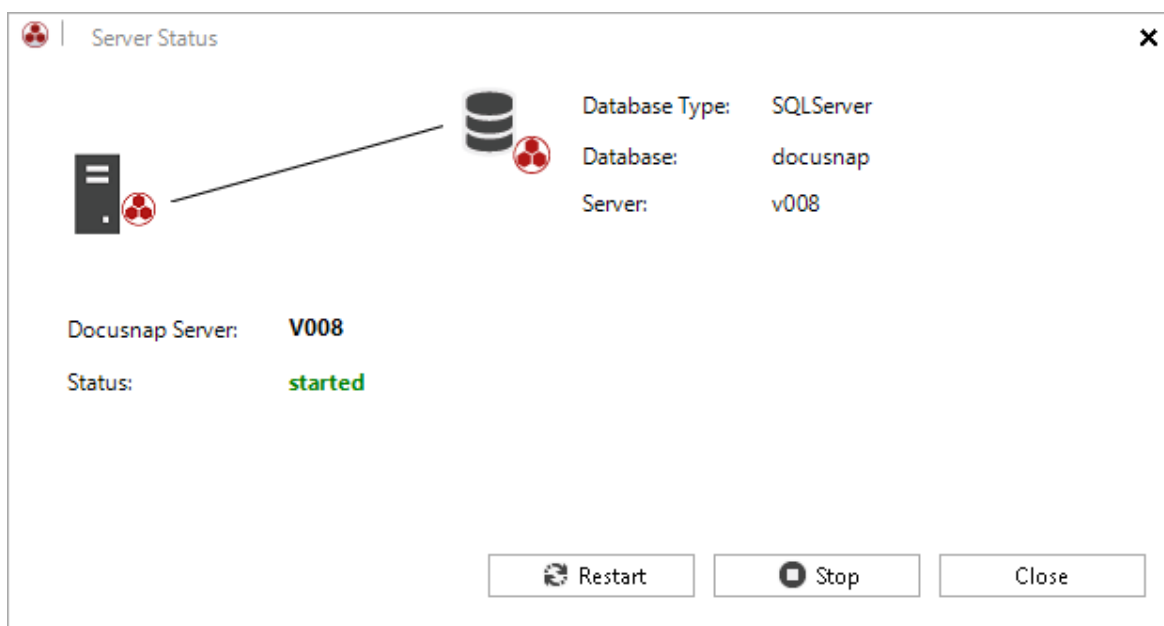
The current status of the Server service and the database to which it is currently connected will be displayed when you click the *Server Status* button in the *Scheduling* ribbon.



The *Status* reflects the current status of the Docusnap Server. You can control the Docusnap Server service by means of the *Stop* and *Restart* buttons. If the advanced user management feature is enabled, you will not be able to start and stop services manually (no permission). For this reason, when you attempt to start or stop the Docusnap Server, the Windows User Account Control opens so that you can run the service as an administrator.



Every ten seconds, *Docusnap* checks the status of the Docusnap Server service. This may cause delays in outputting the current status.



15.4 Automation

In Docusnap, you can schedule various jobs and tasks (inventory, documentation, etc.) and have the Docusnap Server execute them automatically at a later time.

The following tasks can be performed automatically by the Docusnap Server:

Inventory

Inventory of Windows systems, SNMP systems, Linux systems, Mac systems, IP segments, offline systems, CIFS, VMware infrastructures, Hyper-V, XenCenter, IIS, Exchange Server, SQL Server, Active Directory, DHCP servers, DNS servers, SharePoint, Oracle, Backup Exec, DFS and Veeam.

XML Import

By executing *DocusnapScript.exe* you can save the information from a particular system in an XML file. The location for these files can be defined by means of various parameters in the *DocusnapScript.exe* file. For example, you can use the logon script to define the share to be used for saving these files when



DocusnapScript.exe is executed. These files can be automatically retrieved and imported through the automation of this process. For details on this topic, refer to the [Importing Scripts](#) section.

Permission Analysis

You can schedule the inventory of NTFS permissions and the creation of the associated documentation for a particular date and time.

Documentation

Datasheets, overviews and maps can be created automatically in the documentation process.

IT Concepts

The server also allows the time-controlled creation of IT concepts.

Notifications

The [Notification](#) feature sends an e-mail, for example, when a license or contract expires.

Reports

It is possible to schedule the creation of reports and have them created at any desired time. The reports will be exported in the selected format.

Docusnap Connect

It is also possible to schedule the export of data to SQL databases, XML files, or CSV files.

15.5 Logging

The debug mode helps you to obtain supporting information in case of problems. This information will be used by the Docusnap Support Team for efficient troubleshooting. Once this mode is enabled, any errors as well as additional information will be saved in the database. For more information on this topic, refer to the [Troubleshooting](#) chapter.

The debug mode for the Docusnap Server can be enabled in the first step of the [Configuration](#) wizard.



Enabling debug mode results in a multitude of debug information being recorded in the database. Make sure to enable this mode only in case of need, as it dramatically reduces the performance of Docusnap due to the analysis executed at runtime.

Part



16 Docusnap Connect

With Docusnap Connect, Docusnap users can prepare specific data in the Docusnap interface (hierarchical structure), reuse it (concepts) or export it for further use. You can either export the data to an SQL or MySQL database or save it as an XML, CSV or Excel file. Thus, Docusnap Connect partially replaces the creation of a user-defined view in the hierarchical structure. The views displayed in the hierarchical structure can also be used later within the Docusnap concepts.

Package Editor

Use the Package Editor to create and edit Connect Packages.

Hierarchical Structure

The content of the Connect Packages are also displayed in the hierarchical structure below the *Connect* caption. The data is filtered according to the company.

Schedule Package

Once you configured your packages, you can schedule their export. The data can either be exported immediately or at a later time using the Docusnap Server.

Import and Export

The packages you configured can be exported and then be imported to another Docusnap database.


16.1 Package Editor

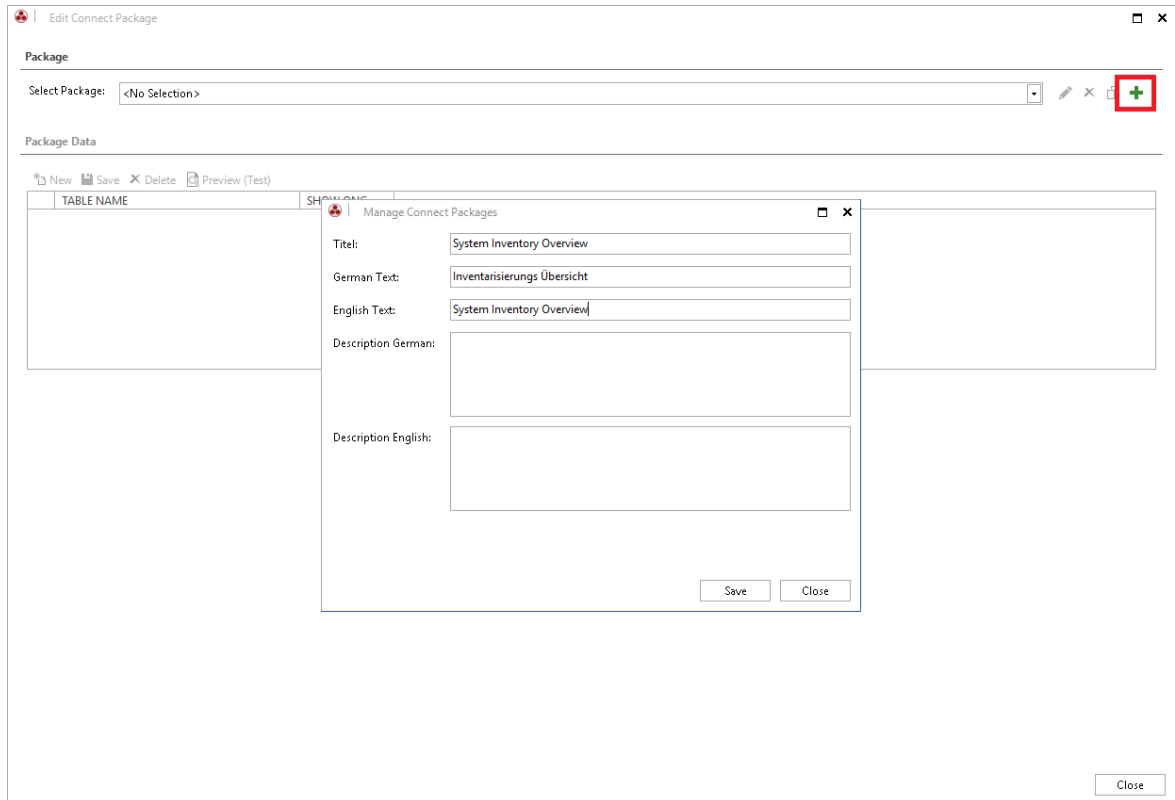
Create Package

The creation of a Docusnap Connect package is done in the ribbon *Extras - Package Editor* dialog. The package is created there and the content to be exported is defined.

In the Edit Connect Package dialog new packages can be created, existing packages can be edited / duplicated or deleted.

Create New Package

Click on the button  to create a new Docusnap Connect package. The title, text German and text English are then filled in and the data saved.



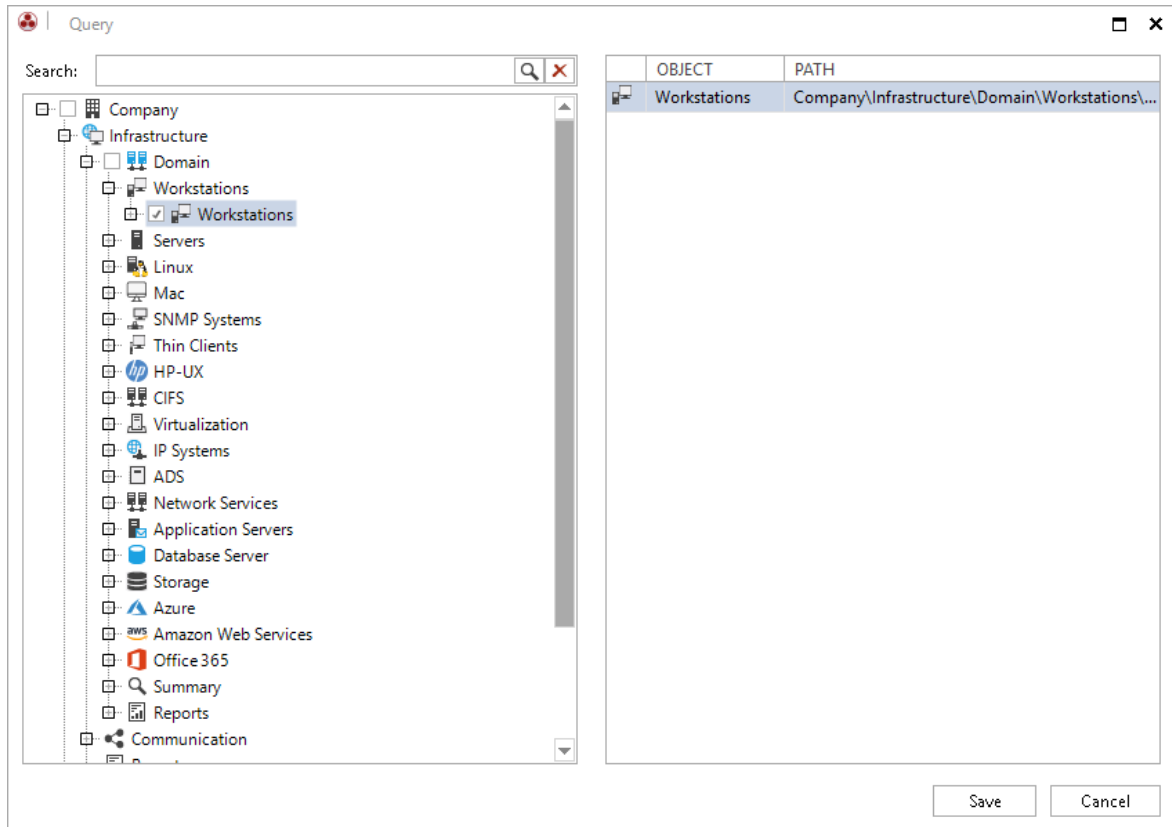
In the *Table Name* list all already defined tables are displayed. When you first open a package an empty table is already created. Enter the name to be assigned to the table after the export in the *Table Name* field.

Docusnap Object

By clicking on the button *Add Docusnap Objects*, all entries from the Explorer *Inventory* are displayed. Tick the checkbox to the left of each object that you want to select for export. By clicking the *Save* button, the dialog is closed and the columns of the selected objects can be used.



If data of an inventory is selected, only the current data of the last inventory is exported.



- **Element:** In the *Element* combobox, select the object whose data you want to export.
- **Column:** By double-clicking a field in the *Column* list, you can display the columns of the selected object. Select the desired column there. If you no longer need a column, you can remove it by selecting the line and either click the *Delete* button or press the *Del* key on your keyboard.
- **Alias:** In the *Alias* column, you can specify the name of the column in the exported table. Each name in the *Alias* column must be unique.
- **Display:** If you enable the *Display* checkbox, the column will be displayed in the exported table. By disabling it, you can hide fields that are only used for data filtering.
- **Reference:** For columns with a reference specified, the reference can be added to the export. If you enable the *Reference* checkbox, the number in the column will be replaced with the corresponding reference text. When exporting, you can select the language in which you want the reference to appear.
- **Sort Order:** Using the *Sort Order* column, you can define the column order.
- **Grouping:** Here, you can select whether the respective column will be used for grouping or whether to calculate the count, maximum, minimum, sum, or average of the column.

- **Filter:** Here, you can enter any valid SQL condition (e.g. = 1). To hide the column used for filtering, you can disable the *Display* checkbox for this column. The clause can further be extended by additional fields or conditions. The filter can only address another column by using the alias. This must be specified with *{Alias:Aliasname of column}*.

Package Editor

Package

Select Package: Windows Systems

Package Data

New Save Delete Preview (Test)

TABLE NAME	SHOW ONC
Workstation	<input checked="" type="checkbox"/>

Query


Delete Entry Add Docusnap Objects Add Static Fields (0 fields defined)

ELEMENT	COLUMN	ALIAS	OUTPUT	USE REFERENCE	AGGREGATE	ORDER	FILTER
Workstations	Name	Workstations Name	<input checked="" type="checkbox"/>			1	
Workstations	Online	Workstations Online	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		2	= 1
Workstations	Host ID	Workstations Host ID	<input checked="" type="checkbox"/>			3	
General	OS	General OS	<input checked="" type="checkbox"/>			4	
			<input checked="" type="checkbox"/>			0	

Close

Static Fields

Static values can be exported, in addition to the values from the table. Click on the button *Add Static Fields* to open the dialog for the static fields. The specified name is used as the column header and the value is specified in the table. As soon as a static value is created, it is included in the export. Values that are no longer required can be removed by clicking on the *Delete* button.



Add Static Fields

Name:
ExportedFrom

Value:
Docusnap

New
Save
Delete

	NAME	VALUE
<input checked="" type="checkbox"/>	ExportedFrom	Docusnap


Successfully stored

Close

Multiple Tables

To export multiple tables, click the *New* button to add more tables for which the data can be configured. If you want to be able to link the data from the different tables after exporting to a database, the primary and foreign keys should also be selected.

Package Editor

Package

Select Package: Windows Systems

Package Data

New Save Delete Preview (Test)

TABLE NAME	SHOW ONC
Workstation	<input checked="" type="checkbox"/>
Domain	<input checked="" type="checkbox"/>

Query

Delete Entry Add Docusnap Objects Add Static Fields (0 fields defined)

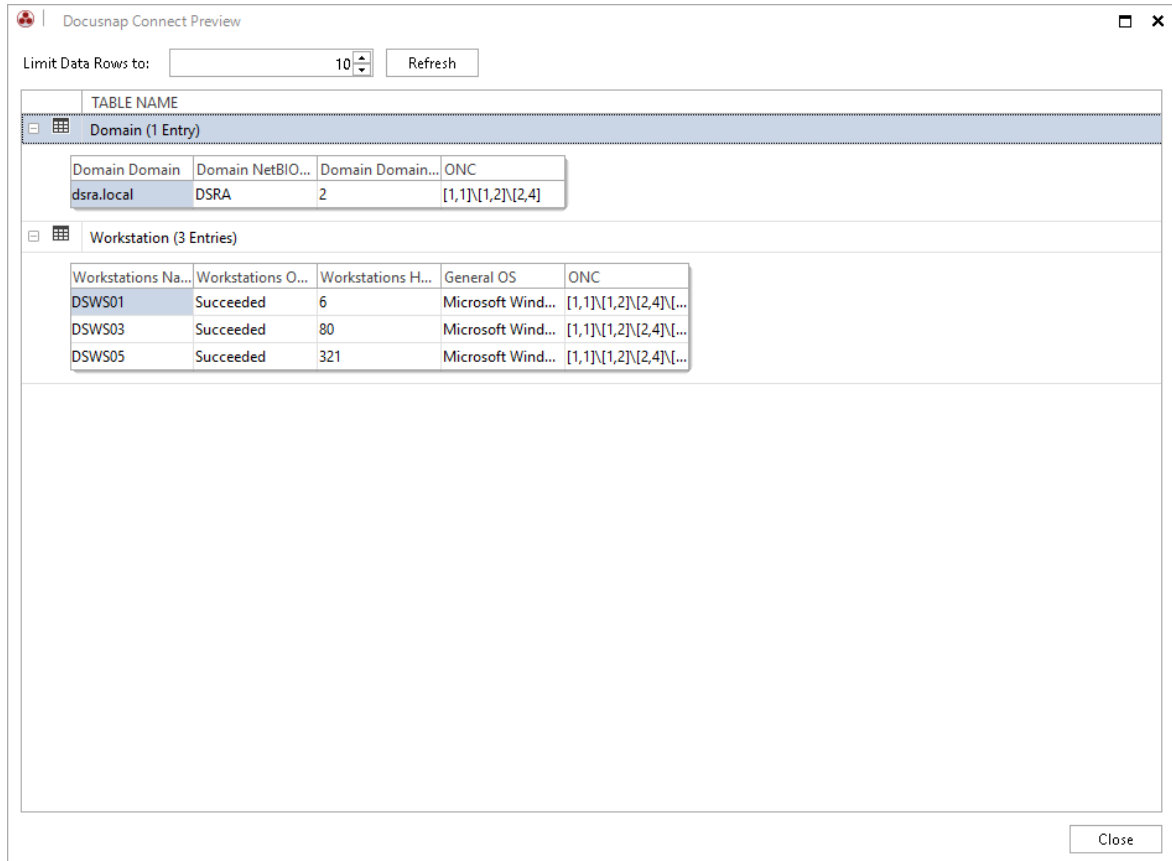
ELEMENT	COLUMN	ALIAS	OUTPUT	USE REFERENCE	AGGREGATE	ORDER	FILTER
Domain	Domain	Domain Domain	<input checked="" type="checkbox"/>			1	
Domain	NetBIOS Name	Domain NetBIOS Name	<input checked="" type="checkbox"/>			2	
Domain	Domain ID	Domain Domain ID	<input checked="" type="checkbox"/>			3	
			<input checked="" type="checkbox"/>			0	

Close

Preview (Test)

Once you have selected the tables and columns, you can click the *Preview (Test)* button to check the table output. By default, the first ten data rows of the table are shown in the preview. You can change this value in the *Limit Data Rows to:* field.

For the export, an additional column named *ONC* will be added to the data. This column identifies each object unambiguously so that, during an update of the SQL database, the objects can be mapped without problems. This column is also used for *DocuSnapLink* when switching from another application to this DocuSnap node.

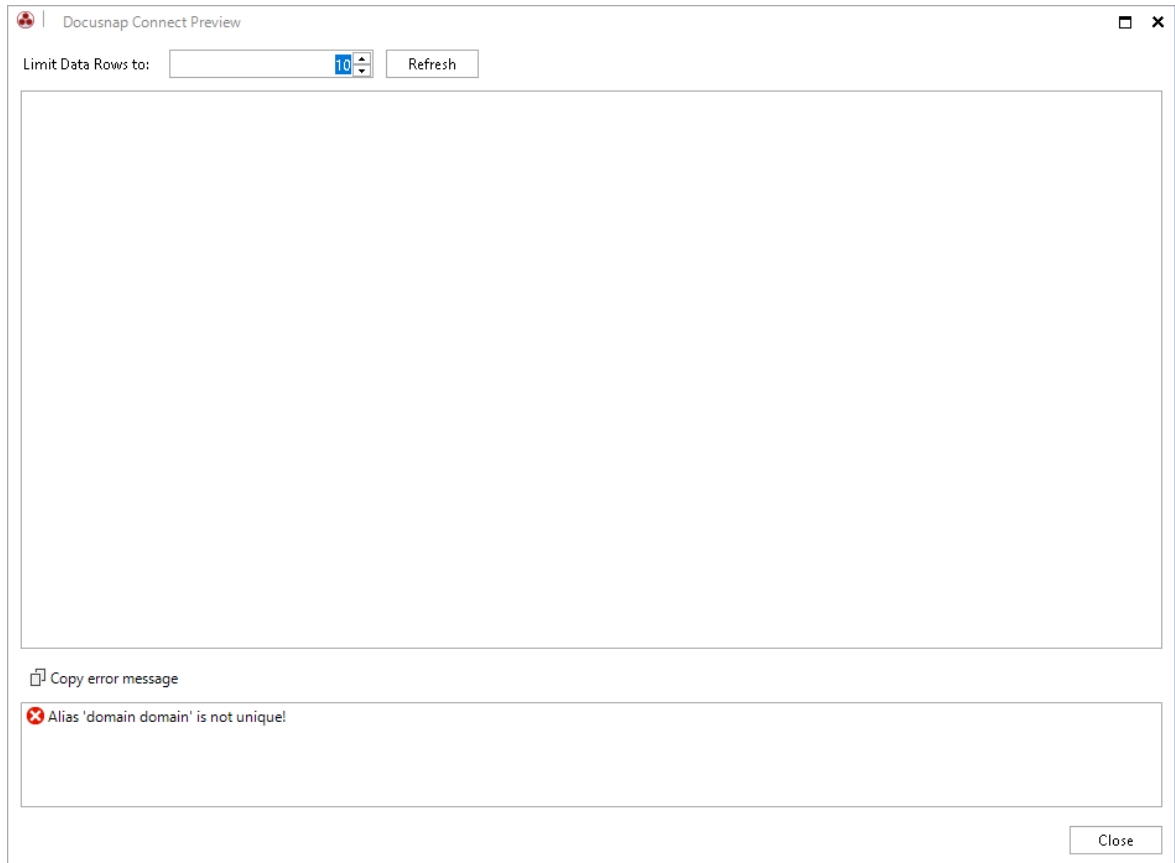


The screenshot shows a window titled "DocuSnap Connect Preview". At the top, there is a "Limit Data Rows to:" field set to "10" and a "Refresh" button. Below this, there are two sections. The first section is titled "Domain (1 Entry)" and contains a table with 4 columns: "Domain Domain", "Domain NetBIO...", "Domain Domain...", and "ONC". The data row shows "dsra.local", "DSRA", "2", and "[1,1]\[1,2]\[2,4]". The second section is titled "Workstation (3 Entries)" and contains a table with 5 columns: "Workstations Na...", "Workstations O...", "Workstations H...", "General OS", and "ONC". The data rows are: "DSWS01", "Succeeded", "6", "Microsoft Wind...", "[1,1]\[1,2]\[2,4]\[...]", "DSWS03", "Succeeded", "80", "Microsoft Wind...", "[1,1]\[1,2]\[2,4]\[...]", and "DSWS05", "Succeeded", "321", "Microsoft Wind...", "[1,1]\[1,2]\[2,4]\[...]". A "Close" button is located at the bottom right of the window.


Domain Domain	Domain NetBIO...	Domain Domain...	ONC
dsra.local	DSRA	2	[1,1]\[1,2]\[2,4]

Workstations Na...	Workstations O...	Workstations H...	General OS	ONC
DSWS01	Succeeded	6	Microsoft Wind...	[1,1]\[1,2]\[2,4]\[...]
DSWS03	Succeeded	80	Microsoft Wind...	[1,1]\[1,2]\[2,4]\[...]
DSWS05	Succeeded	321	Microsoft Wind...	[1,1]\[1,2]\[2,4]\[...]

If an error occurs during the export test, it will be displayed as an error message in the lower area.



Union

At the bottom, clicking on the  button creates a union. The Union works like a union in SQL. The data from various objects is combined in one table. If the same *Alias* name is given for columns in the different definitions, the data is output in one column. If there is no matching *Alias* name in the other definition for one column, that column will be left empty for the entries in the other table.

For example, the union can be used to show the systems from the Workstations node and the Servers node in one table.

Definition for workstations

Package Editor

Package

Select Package: Windows Systems

Package Data

New Save Delete Preview (Test)

TABLE NAME	SHOW ONC	
Windows	<input checked="" type="checkbox"/>	
Domain	<input checked="" type="checkbox"/>	

Query UNION

Delete Entry Add DocuSnap Objects Add Static Fields (0 fields defined)

ELEMENT	COLUMN	ALIAS	OUTPUT	USE REFERENCE	AGGREGATE	ORDER	FILTER
Workstations	Name	Name	<input checked="" type="checkbox"/>			1	
Workstations	Online	Online	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		2	= 1
Workstations	Host ID	Host ID	<input checked="" type="checkbox"/>			3	
General	OS	OS	<input checked="" type="checkbox"/>			4	
Workstations	Type	Type	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		5	
			<input checked="" type="checkbox"/>			0	

Close

Definition for servers

Package Editor

Package

Select Package: Windows Systems

Package Data

New Save Delete Preview (Test)

TABLE NAME	SHOW ONC	
Windows	<input checked="" type="checkbox"/>	
Domain	<input checked="" type="checkbox"/>	

Query UNION

Delete Entry Add DocuSnap Objects Add Static Fields (0 fields defined)

ELEMENT	COLUMN	ALIAS	OUTPUT	USE REFERENCE	AGGREGATE	ORDER	FILTER
Servers	Name	Name	<input checked="" type="checkbox"/>			1	
Servers	Online	Online	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		2	
Servers	Host ID	Host ID	<input checked="" type="checkbox"/>			3	
General	OS	OS	<input checked="" type="checkbox"/>			4	
Servers	Type	Type	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		5	
			<input checked="" type="checkbox"/>			0	

Close

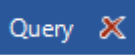
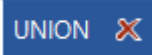
In this example, a union was added for the node server. The same names have been assigned for the columns. This will then output the data of the two definitions like in the preview.

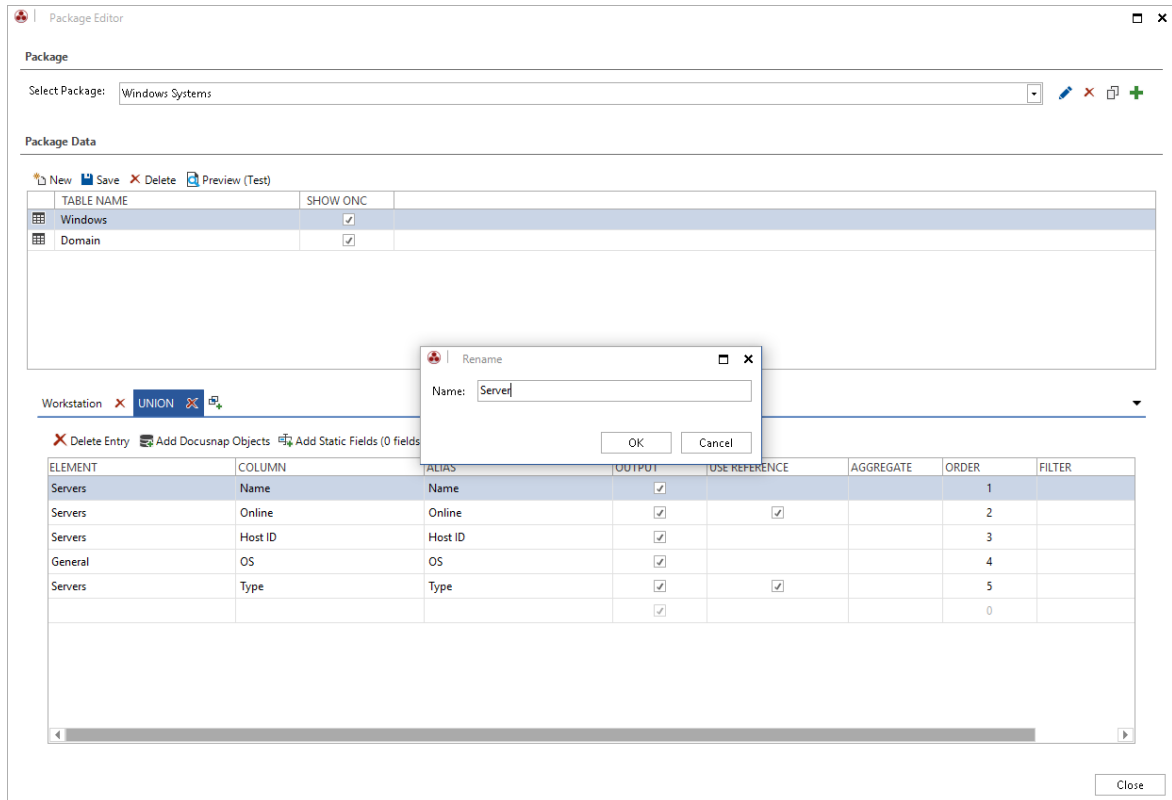
Docusnap Connect Preview

Limit Data Rows to: 20 Refresh

TABLE NAME					
Domain (1 Entry)					
Windows (16 Entries)					
Name	Online	Host ID	OS	Type	ONC
DSBK01	Succeeded	77	Microsoft Wind...	Server	[1,1]\[1,2]\[2,4]\[...
DSBK02	Succeeded	161	Microsoft Wind...	Server	[1,1]\[1,2]\[2,4]\[...
DSDC01	Succeeded	1	Microsoft Wind...	DC	[1,1]\[1,2]\[2,4]\[...
DSEX01	Succeeded	3	Microsoft Wind...	Server	[1,1]\[1,2]\[2,4]\[...
DSFS01	Succeeded	7	Microsoft Wind...	Server	[1,1]\[1,2]\[2,4]\[...
DSFS02	Succeeded	2	Microsoft Wind...	Server	[1,1]\[1,2]\[2,4]\[...
DSFS03	Succeeded	159	Microsoft Wind...	Server	[1,1]\[1,2]\[2,4]\[...
DSFS04	Succeeded	156	Microsoft Wind...	Server	[1,1]\[1,2]\[2,4]\[...
DSHY01-N1	Succeeded	318	Microsoft Wind...	Server	[1,1]\[1,2]\[2,4]\[...
DSHY01-N2	Succeeded	320	Microsoft Wind...	Server	[1,1]\[1,2]\[2,4]\[...
DSSP01	Succeeded	158	Microsoft Wind...	Server	[1,1]\[1,2]\[2,4]\[...
DSSP02	Succeeded	5	Microsoft Wind...	Server	[1,1]\[1,2]\[2,4]\[...
DSSP03	Succeeded	164	Microsoft Wind...	Server	[1,1]\[1,2]\[2,4]\[...
DSWS01	Succeeded	6	Microsoft Wind...	Workstation	[1,1]\[1,2]\[2,4]\[...
DSWS03	Succeeded	80	Microsoft Wind...	Workstation	[1,1]\[1,2]\[2,4]\[...
DSWS05	Succeeded	321	Microsoft Wind...	Workstation	[1,1]\[1,2]\[2,4]\[...

Close

By double-clicking on  or , a different name can be specified. Especially when multiple unions are used, naming the definitions makes it easier to select the right one.



Customized Objects

Customized objects and tables can be exported with DocuSnap Connect. If a user table has been created for which a primary key and a foreign key have been defined, this object can be exported. If this is a user-defined view from which the data is to be exported, a number of points must be observed.

The SQL statement of the view is changed during the export in order to be used for the Connect. For this reason, the column used for filtering with *{FilterID}* must be included in the *Select* part of the view. This value is then matched against the primary key of the parent object. The column must have the same name as the primary key of the parent table or view for the match to take place. For example, if a view was created with customized tables in which the column is called *xAccountID* and not *AccountID*, but this view is located below the DocuSnap table *tAccounts* in which the primary key is called *AccountID*, the view in the *Select* part the *xAccountID* would have to be renamed with *as AccountID*.

In order to reload changes to the metaschema, you must exit the administration area and then reopen the administration area. The changes are then available for the Connect package.

16.2 Hierarchical Structure

The previously created Connect Package can now be displayed in the hierarchical structure (data tree) and thus quickly and easily provide searched information.



Both the filter and the Excel export can be used for this view. Columns can also be hidden using the context menu.

The screenshot shows the Docusnap X application interface. The top ribbon includes tabs for Docusnap, INVENTORY, DOCUMENTS, SCHEDULING, and EXTRAS. The INVENTORY tab is active, showing a list of servers under the 'Data (16)' section. The left sidebar shows a tree view with categories like Overview, Infrastructure, Assets, Sites, Organization, Connect, and Windows. The main table displays the following data:

NAME	ONLINE	OS	TYPE
DSBK01	Succeeded	Microsoft Windows Server 2012 R2 Stan...	Server
DSBK02	Succeeded	Microsoft Windows Server 2016 Datacen...	Server
DSDC01	Succeeded	Microsoft Windows Server 2012 R2 Stan...	DC
DSEX01	Succeeded	Microsoft Windows Server 2012 R2 Stan...	Server
DSFS01	Succeeded	Microsoft Windows Server 2008 R2 Enter...	Server
DSFS02	Succeeded	Microsoft Windows Server 2012 R2 Stan...	Server
DSFS03	Succeeded	Microsoft Windows Server 2016 Datacen...	Server
DSFS04	Succeeded	Microsoft Windows Server 2008 R2 Enter...	Server
DSHV01-N1	Succeeded	Microsoft Windows Server 2016 Datacen...	Server
DSHV01-N2	Succeeded	Microsoft Windows Server 2016 Datacen...	Server
DSSP01	Succeeded	Microsoft Windows Server 2008 R2 Enter...	Server
DSSP02	Succeeded	Microsoft Windows Server 2008 R2 Enter...	Server
DSSP03	Succeeded	Microsoft Windows Server 2016 Datacen...	Server
DSWS01	Succeeded	Microsoft Windows 8.1 Enterprise	Workstation
DSWS03	Succeeded	Microsoft Windows 10 Enterprise	Workstation
DSWS05	Succeeded	Microsoft Windows 10 Enterprise	Workstation

16.3 Schedule Package

Once you configured the packages in Docusnap Management, you can export the corresponding data.

Click the *Schedule Connect Package* button in the *Extras* ribbon to launch the *Docusnap Connect* wizard. In the first step, select the package to be exported. To do so, click the *New* button. Then, save your selection and configure the target.

You can select as many packages for export as desired. In addition, it is possible to export them to different targets.

To open the target configuration dialog, click the *Edit* button.



1

Export

2

Summary

3

Scheduling

Predefined Configuration

Configuration:

Windows Systems

New


Save

Delete

Display Name:

Windows Systems

Configuration Selection

	DISPLAY NAME	CONFIGURATION NAME	DESCRIPTION	EDIT TARGET	
<input type="checkbox"/>	 Windows Systems	Windows Systems		Edit	

Next

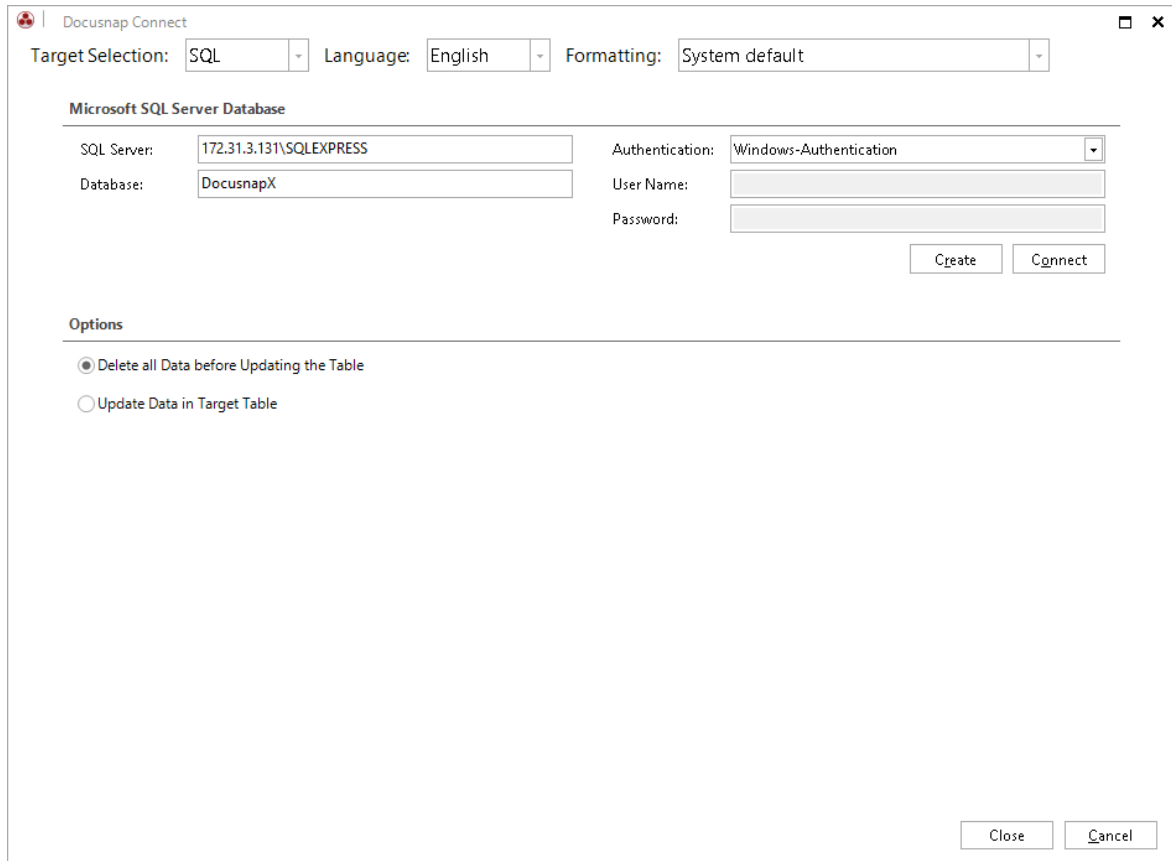
Cancel

Configuring Docusnap Connect Targets

You can export the data to an SQL or MySQL database or save it as an XML, CSV or Excel file from within Docusnap. First, select the target in the *Target Selection* field. In the *Language* field, select the language in which you want the references to be written.

SQL

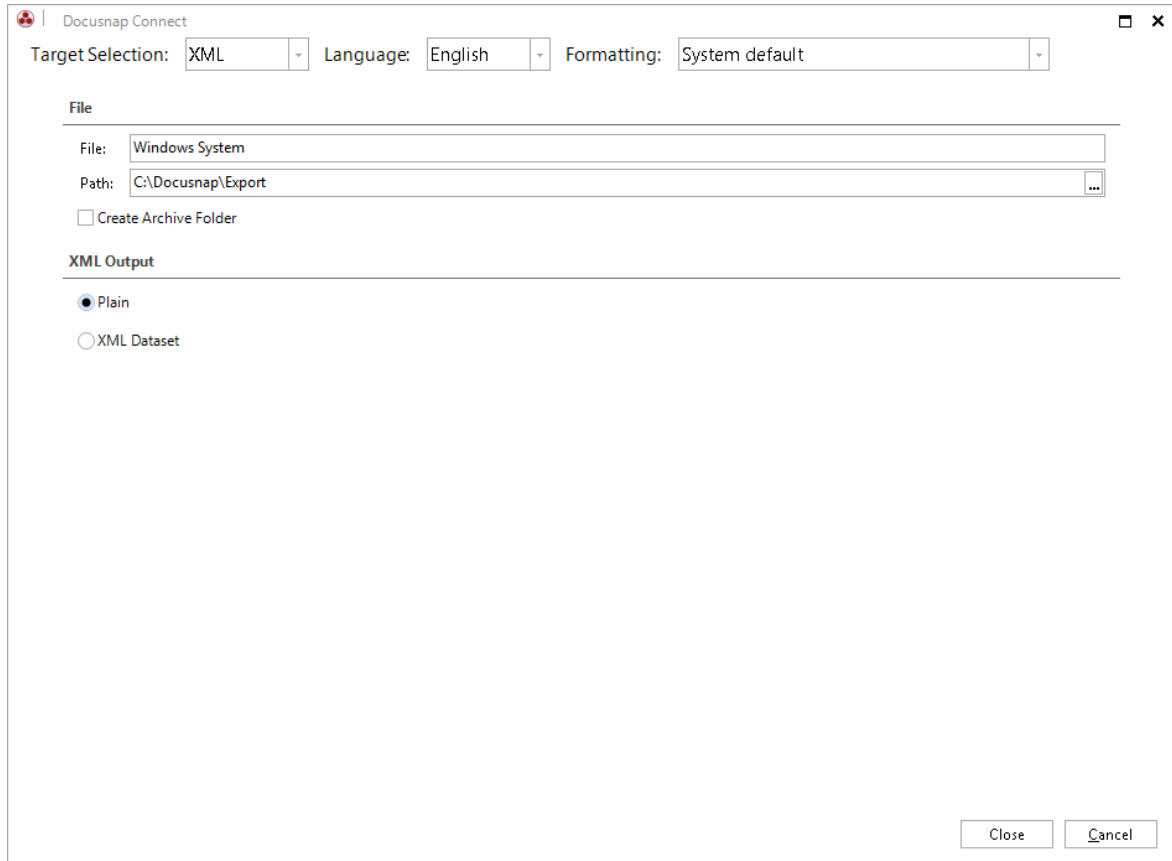
Before you can export the data to an SQL database, the connection to the SQL server and the desired database must be checked. If the specified database does not exist on the SQL server, it may be created. When exporting data to an SQL database, you can specify whether previously exported data should be updated or if you want to delete all data and populate the tables with the new export data.



The screenshot shows the 'Docusnap Connect' dialog box. At the top, there are three dropdown menus: 'Target Selection' set to 'SQL', 'Language' set to 'English', and 'Formatting' set to 'System default'. Below these is a section titled 'Microsoft SQL Server Database'. It contains two rows of input fields: 'SQL Server' with the value '172.31.3.131\SQLEXPRESS' and 'Authentication' with a dropdown set to 'Windows-Authentication'. The second row has 'Database' set to 'DocusnapX', 'User Name' (empty), and 'Password' (empty). To the right of these fields are 'Create' and 'Connect' buttons. Below this section is an 'Options' section with two radio buttons: 'Delete all Data before Updating the Table' (selected) and 'Update Data in Target Table'. At the bottom right of the dialog are 'Close' and 'Cancel' buttons.

XML

When exporting data to an XML file, you must specify its name and path. By enabling the *Create Archive Folder* checkbox, you can move older files to an archive folder. For the output, you can select a plain format or XML Dataset.

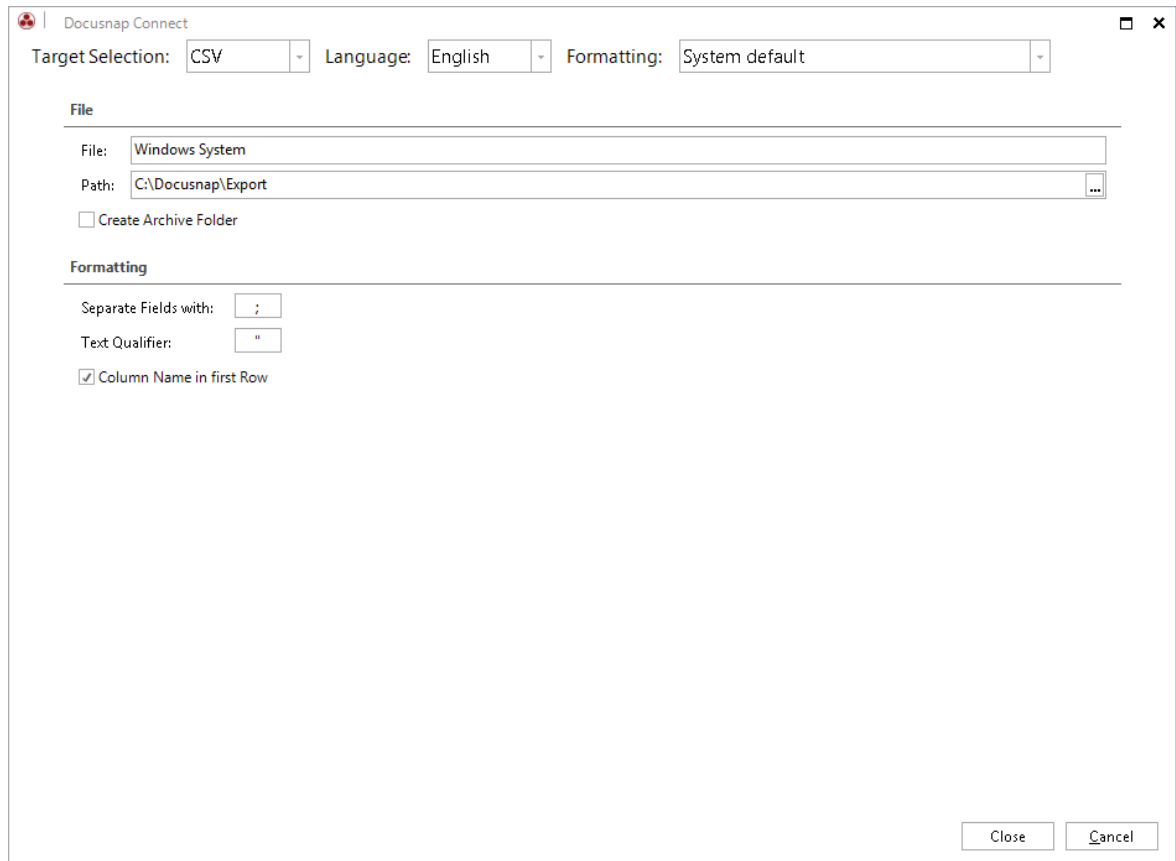


The screenshot shows the 'Docusnap Connect' dialog box. At the top, there are three dropdown menus: 'Target Selection' set to 'XML', 'Language' set to 'English', and 'Formatting' set to 'System default'. Below these, the 'File' section contains a 'File' text field with 'Windows System' and a 'Path' text field with 'C:\Docusnap\Export'. A checkbox labeled 'Create Archive Folder' is unchecked. The 'XML Output' section has two radio buttons: 'Plain' (selected) and 'XML Dataset' (unselected). At the bottom right, there are 'Close' and 'Cancel' buttons.

CSV

When exporting data to a CSV file, you must specify its name and path. In the *Separate Fields with* field, you can specify the field separator. The character you specify in the *Text Qualifier* field defines all text between two occurrences of this character as a unit. By ticking the *Column Name in First Row* checkbox, you can specify that the column names will be included in the output.

When you configure your package so that data will be exported to multiple tables, a separate CSV file will be created for each table.



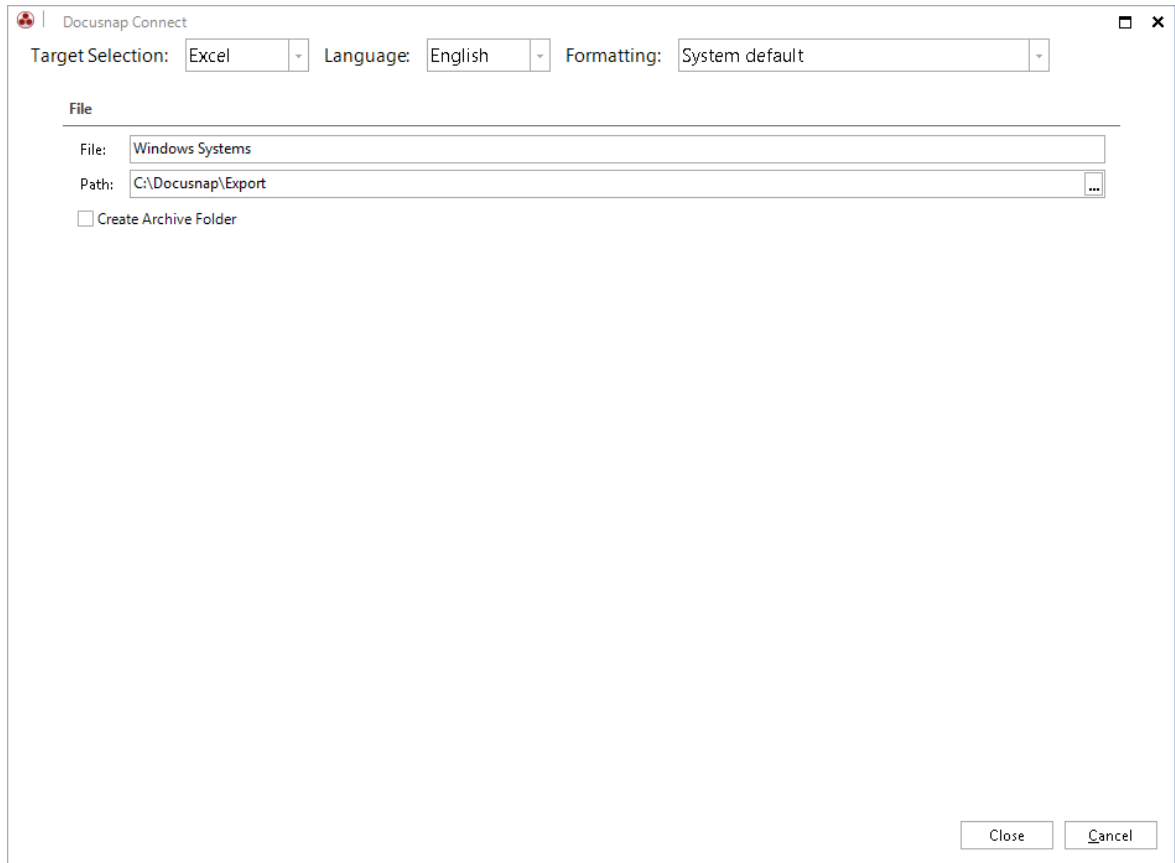
The screenshot shows the 'Docusnap Connect' window with the following settings:

- Target Selection:** CSV
- Language:** English
- Formatting:** System default
- File:**
 - File:** Windows System
 - Path:** C:\Docusnap\Export
 - ☐ Create Archive Folder
- Formatting:**
 - Separate Fields with:** ;
 - Text Qualifier:** "
 - ☒ Column Name in first Row

Buttons at the bottom right: Close, Cancel.

Excel

When exporting data to an Excel file, you must specify its name and path. By enabling the *Create Archive Folder* checkbox, you can move older files to an archive folder. If during configuration you decide to distribute the data output to multiple tables, a separate worksheet is created in the Excel file for each table.



MySQL

Before you can export the data to a MySQL database, the connection to the MySQL server and the desired database must be checked. If the specified database does not exist on the MySQL server, you create it in this dialog. When exporting data to a MySQL database, you can specify if previously exported data should be updated or if you want to delete all data and populate the tables with the new export data.

The Driver drop-down list lists all installed MySQL ODBC drivers.



The MySQL ODBC driver is not supplied with Docusnap and must be installed manually. You can download the driver from the MySQL website. Follow the instructions and make sure you download and install the correct version.

Docusnap requires the 64-bit version of the MySQL ODBC driver for a 64-bit operating system and the 32-bit version of the MySQL ODBC driver for a 32-bit operating system. There are some known problems with the 3.51 version of the 64-Bit ODBC Driver. Please install version 5.3 or higher.

Docusnap Connect

Target Selection: MySQL Language: English Formatting: System default

MY SQL Server Database

Driver: MySQL ODBC 5.3 ANSI Driver User Name: admin
SQL Server: sdevsql01 Password: *****
Database: Docusnap Port: 3306

Create Connect

Options

☒ Delete all Data before Updating the Table
☐ Update Data in Target Table

Close Cancel

Summary

The Summary page shows all packages to be exported.

Scheduling

By using the [Scheduling](#) feature, you can specify that the automatic start of the data export starts at a later time.

In order to use this feature, the Docusnap Server component must be configured for this database on a system in the network.

Status

After the export has started, the dialog will display its progress. To abort the export process, click the *Cancel* button. All packages flagged as *Completed* have already been exported. They will not be deleted.

Final Report

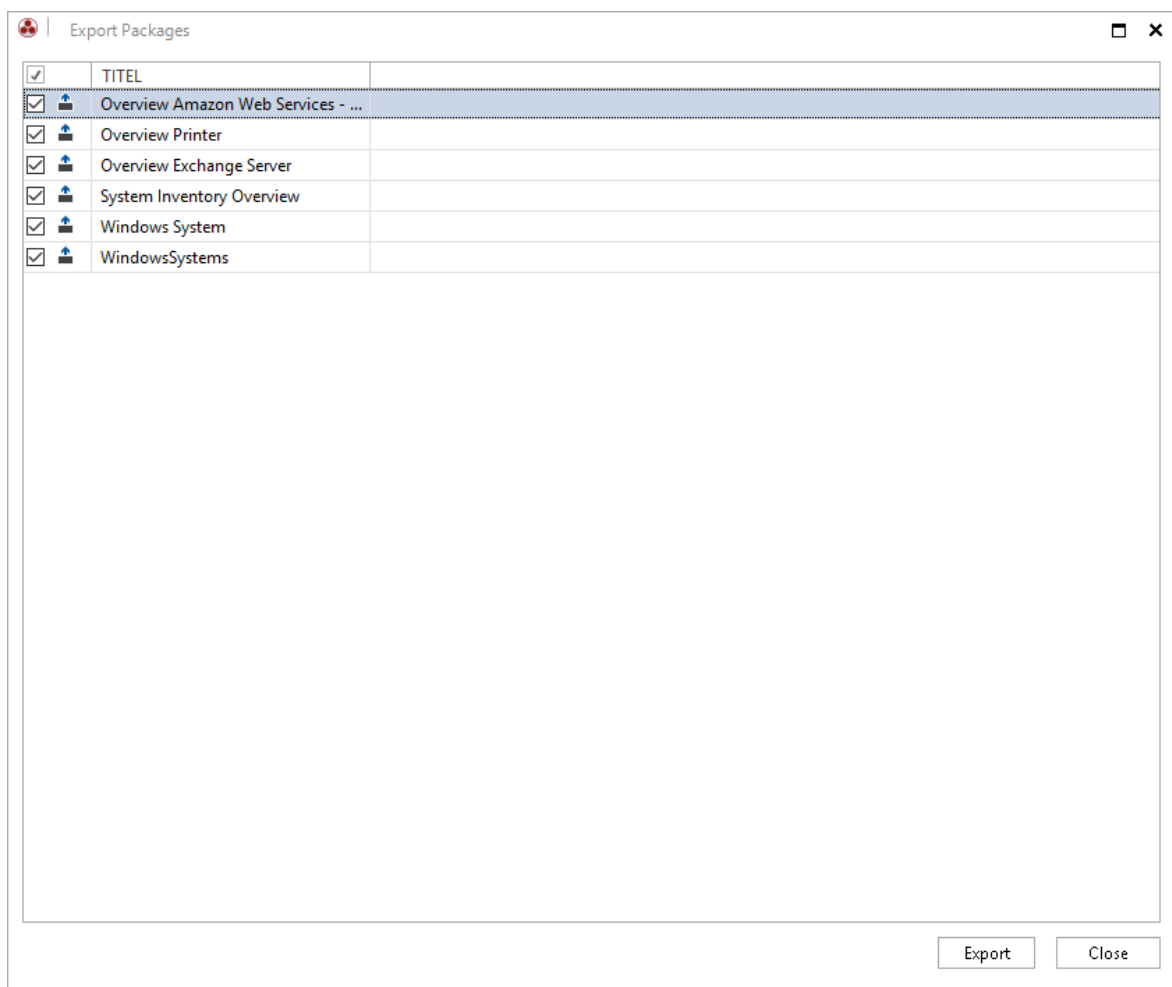
The final report shows which packages could be exported successfully. To exit the wizard, click the *Close* button.

16.4 Import and Export

The packages you configured can be exported and then be imported to another Docusnap database. By importing the configuration, you can export data from the current database without having to create the configuration again.

Export

Click the *Export Package* button on the *Extras* ribbon to open the *Export Package* dialog. It lists all configured packages. Tick the checkboxes for all packages to be exported. Then, click the *Export* button and specify the name and path for the exported file. The Docusnap Connect packages included in this file can subsequently be imported to a different database.



Import

Click the *Import Package* button on the *Scheduling* ribbon to import a file in which Docusnap Connect packages have been previously exported.

Part

xvi

17 Data Import

To process large data volumes which cannot be inventoried in Docusnap, you can use the data import feature. It allows you to import data which have been stored in a CSV file to Docusnap.

This data can be imported to IT assets, extensions, and any desired tables.

17.1 Wizard

Click the *Data Import (csv)* button in the *Data* ribbon to open the data import wizard.

Import

In the first step, you can specify where to import the data. The following options are available: IT Assets, Extensions, and Table. Under IT Assets, all existing classes can be selected as the target. For the import to tables, you can select any available real tables. Under Extensions, you can select the Comments, Finances, Reminders, Contracts, or Passwords category. The import of passwords is only possible if an encryption file has been selected.

The screenshot shows the 'Data Import' wizard window. At the top, there is a progress bar with four steps: 1 (Import), 2 (Source), 3 (Target), and 4 (Data Assignment). Step 1 is currently active. Below the progress bar, the 'Import Definition' section contains three radio button options: 'Table', 'IT Assets' (which is selected), and 'Extensions'. Each option has a corresponding dropdown menu. The 'IT Assets' dropdown menu is open, showing 'iPhone' as the selected item. At the bottom right of the window, there are 'Next' and 'Cancel' buttons.

Source

Once you have selected the import type, specify the import file in the next step. The preview shows the first ten entries of the selected file. In the *Delimiter* group, you can specify the character used as separator for the data. The character specified in the *Text Qualifier* field defines all text between two occurrences of this character as a unit. Tick the *First Row as Header* checkbox to specify that the first row contains headers that should not be treated as data.

1

2

3

4

Import

Source

Target

Data Assignment

Select File

File

C:\Docusnap\iPhoneList.csv

Delimiter

☐ TabStop
 ☐ Space
 ☐ Comma
 ☒ Semicolon
 ☐ Other:

Options

Text Qualifier: "

☒ First Row as Header

Preview

Name	ModelName	SerialNumber	Memory	OSVersion	IMEI
iPhone_01	iPhone 6	12332423	3 GB	iOS 6	49-015420-323741
iPhone_02	iPhone 5	12332421	1 GB	iOS 6	49-025420-323742
iPhone_03	iPhone 6	12332415	2 GB	iOS 6	49-035420-323743
iPhone_04	iPhone 5	12332418	4 GB	iOS 6	49-045420-323744
iPhone_05	iPhone 6	12332414	3 GB	iOS 6	49-055420-323745
iPhone_06	iPhone 5	12332412	1 GB	iOS 6	49-065420-323746
iPhone_07	iPhone 6	12332410	2 GB	iOS 6	49-075420-323747

Back

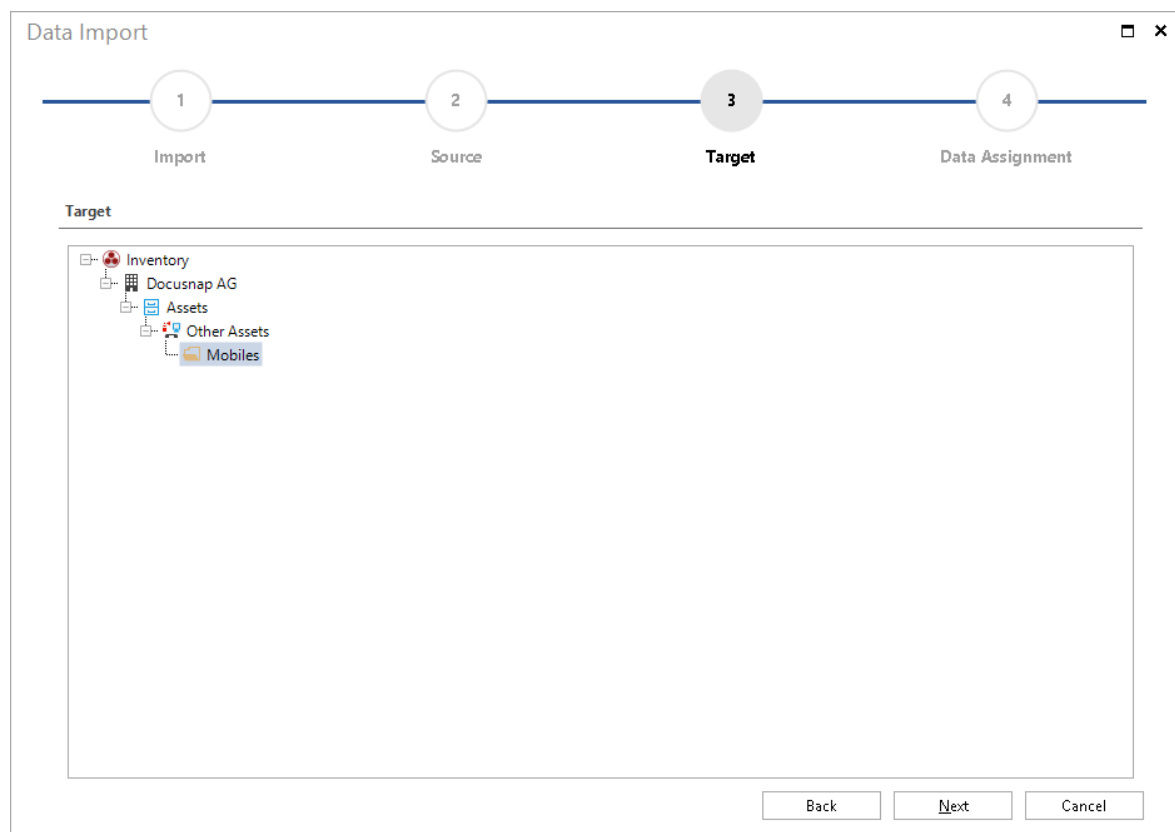
Next

Cancel

Target

The window for the *Target* step is only shown when you import IT assets or extensions.

- **IT Assets:** In the case of IT assets, select the folder for the IT assets to be imported.
- **Extensions:** Extensions are assigned to existing static objects. When importing extensions, specify the object to which the data should be associated. All static objects are available for selection.



Data Assignment

In the Data Assignment step, you can specify the columns to be used for storing the data to be imported. Mandatory fields, i.e. fields that must be filled in the database, are flagged by a yellow exclamation mark.

The *CSV Values* field lists the column headers from the CSV file. The *Assign* field shows all columns available in the selected table or all properties of the selected IT asset. To assign a field from the *CSV Values* field to a field listed in the *Target Settings* field, select the respective fields and click the *Assign* button to link them. To delete all assignments, click the *Reset Assignment* button.

When you click the *Save Assignment* button, an XML file which contains all specified assignments will be saved to the folder where the selected CSV file resides.

If you later select the same CSV file, whose contents may have changed, again for import, load the assignments from this XML file by clicking the *Load Assignment* button. This way, you need not define the assignment again.

Columns filled with an auto-increment value will be hidden by default. To display them, enable the *Ignore Auto-Increment* checkbox.

If you want to update previously imported data or compare new data with the previously imported data, enable the *Import as Update* checkbox. Then, you can specify settings related to the update in the *Update* step which displays next.



When importing data into tables, in most cases, the foreign key to the parent tables must be considered, otherwise the import will fail. For example, if the contact information is inserted into the `tContacts` table, the Account ID (`tContacts.AccountID`) must be specified so that the contacts in the tree can be displayed at the correct company. The columns named *AccountID* and *DomainID* are always the company or the domain to which the entry should belong after the import. In the *DocuSnap Management* in the *Manage Tables* tab, the name of the foreign key column can be found. If the name of the columns is not sufficient to determine the parent table, you can use the *Manage Objects* tab to locate the object to which you want to import and then find the parent table. Subsequently, in the SQL Management Studio, a select statement can be executed on the parent table to

obtain the foreign keys. For example, the AccountID can be found by using the statement `select tAccounts.AccountID, tAccounts.AccountName from tAccounts`. The AccountID of the desired company must be specified in the CSV file so it can be assigned during the import. After importing the data, they are then displayed at the correct company. As an alternative to the SQL Management Studio, you could also create a Connect Package containing the data of the table to obtain the correct foreign keys.

1

2

3

4

5

Import

Source

Data Assignment

Status

Report

Data Assignment

CSV Values

Name

AccountID

Target Settings

Account ID

Last Name

DsGUID

Title

Position

Department

Sex

Phone Number

Cell Phone Number

Fax Number

Private Phone Number

Email

Description

Assignment

FirstName --> First Name

Assign

Delete Assignment

Reset Assignment

Save Assignment

Load Assignment

☒ Ignore Auto-Increment
 ☐ Import as Update

Back

Start

Cancel

⚠ Values must be assigned to mandatory fields.

Update

Under Update Settings, you can choose to update existing records or only add new records. If you select *Update existing records*, new records will be added and records which have changed will be updated.

To enable the data comparison, you must select one or more values which are unique and therefore comparable, e.g. customer number, first name and/or last name. If a value occurs multiple times, none of the entries will be updated. These entries will be listed as *skipped* in the final report.

The screenshot shows a 'Data Import' window with a progress bar at the top. The progress bar has five steps: 'Steps 1-3', 'Data Assignment', 'Update' (which is highlighted with a grey circle), 'Status', and 'Report'. Below the progress bar, there are two sections: 'Update Settings' and 'Specify Compare Fields'. In the 'Update Settings' section, there are two radio buttons: 'Update Existing Records' (which is selected) and 'Add only new Records'. In the 'Specify Compare Fields' section, there is a list of fields with checkboxes: 'SerialNumber', 'Model Name', 'IMEI', 'Memory', 'Name' (which is checked), and 'OS Version'. At the bottom right of the window, there are three buttons: 'Back', 'Start' (which is highlighted with a dashed border), and 'Cancel'.

Data Import

Steps 1-3 Data Assignment **Update** Status Report

Update Settings

☒ Update Existing Records ☐ Add only new Records

Specify Compare Fields

☐ SerialNumber
☐ Model Name
☐ IMEI
☐ Memory
☒ Name
☐ OS Version

Back Start Cancel

Status

The Status page displays information about the status and progress of the current import process.

Final Report

The final report lists the number of records imported successfully and specifies whether the import of any records failed.

Part



18 Docusnap and external Programs

Docusnap offers the possibility to switch from external programs to Docusnap and expand the Data Explorer to show a specific node.

To enable this, there is the DocusnapLink.exe. This program can either be called directly or started via the Docusnap protocol.

When opening Docusnap, several parameters can be specified. The first parameter is the *ONC* with the specific *ONC* path. The *ONC* path determines the object to be expanded. If you enter an invalid or no *ONC* path at all, Docusnap will only be launched, but no node will be selected in the Explorer.

If Docusnap is not running while you start the DocusnapLink feature, the system looks for a valid installation and starts it, if one is found. If Docusnap is active, the Docusnap window will get the focus.



ONC (Object Numbering Convention) refers to a coded path which takes you to an actual node in the Docusnap tree views. It uniquely identifies each node in Docusnap. When data is exported using *Docusnap Connect*, the *ONC* for every single entry is exported as well. This ensures that the *ONC* value is available when a database exported through [Docusnap Connect](#) is used.

Settings you define in the *Options* dialog will be stored in a configuration file located on the computer where Docusnap is running. If multiple employees want to use the same settings when working in Docusnap, it is possible to start the program using a shared configuration file.

This central configuration file should also be used if Docusnap is started by an external program in order to start Docusnap with the desired settings. In this case the parameter *-UseConfig* is specified with the path of the location of the central configuration file as an additional parameter. When the *-SelectConfig* parameter is used, a dialog appears before the Docusnap startup which allows you to select the path to the configuration file. Then, Docusnap will be started using the settings from the selected configuration file.

If the link to Docusnap does not work, the parameter *-log* can be specified to output error messages in the command line.

Docusnap Protocol

The Docusnap protocol can be called in Explorer or in Internet Explorer with *docusnap:* or *docusnap: //*. In the background, DocusnapLink is called, which then opens Docusnap. To open the Data Explorer from Docusnap to a specific node, the

ONC is specified. This value is specified in the following format. `Docusnap: [1,1] \ [1,2]`

For the protocol the additional parameters can be specified. The parameters are separated by a `&`, the `?` is separating the ONC and the optional parameters. If no ONC is specified, the `?` must not be specified before the parameter.

```
docusnap:[ONC]?Parameter1
docusnap:[ONC]?Parameter1&Parameter2
docusnap:?Parameter1&Parameter2
docusnap:Parameter1&Parameter2

docusnap:[1,1]\[1,2]?-SelectConfig
docusnap:[1,1]\[1,2]?-UseConfig&C:\Docusnap\Config.xml
```

DocusnapLink

The *DocusnapLink.exe* is used to start Docusnap with an external program. The Docusnap installer places this executable in the *Tools* folder. Parameters can be passed when starting this program: The first parameter is *-ONC* with the actual ONC path enclosed in quotation marks.

The *-UseConfig* and *-SelectConfig* parameters are used to start Docusnap with the desired settings if a central configuration file is used. In this case *-UseConfig* is specified with the path of the location of the central configuration file in quotation marks as an additional parameter. For example *-UseConfig "\sfile01\ita\Docusnap\Configuration.xml"*. The *-SelectConfig* parameter is specified to select a configuration at startup.

If the link to Docusnap does not work, the parameter *-log* can be specified to output error messages in the command line.

The parameters for the path, the configuration and the logging can be specified in any order.



Part



19 Settings

In the next sections, you will learn about the settings available in Docusnap.

Options

In the Docusnap Options dialog, you can specify settings that relate to the entire Docusnap application.

Layout (CI)

For some modules such as Reporting, Documentation or IT Concepts, you need to select the design to be used. In the Layout (CI) dialog, you can select a common design to be applied to all modules.

Company settings are helpful if you have to manage multiple companies in Docusnap. It may be necessary, for example, to define specific headers and footers for the reports generated for a certain company.

Permissions

Docusnap features an integrated user management. The User Management feature enables you to grant users access to the Docusnap controls and features and allows them to use extensions.

19.1 Options

Click the *General Options* button in the [Docusnap Menu](#) to open the *Options* dialog.

The Options dialog consists of the following pages:

General

Licensing

Database

Update

19.1.1 General

General Settings

If the *Show Network Maps* option is enabled, created network maps will be displayed on the [Documents](#) tab. Loading large network maps may take a long time. For this reason, it is possible to disable the output and automated loading of network maps.

The *Password Logging* feature allows you to track which user copied which password and / or displayed it in plain text. By checking the *Password Logging* checkbox, you can enable or disable the password logging functionality.

The language for the program will be determined in the *Options* dialog. Docusnap provides the choice of either English or German. The language for Docusnap will be set by selecting it from the combo box. For a language change to take effect, the program must be re-started.

Debugging

The debug mode helps you to obtain supporting information in case of problems. This information will be used by the Docusnap Support Team for efficient troubleshooting. Once this mode is enabled, any errors as well as additional information will be saved in the database. For more information on this topic, refer to the [Troubleshooting](#) section.



Enabling debug mode leads to a multitude of debug information being recorded in the database. This mode should only be enabled if errors occur, since the performance of Docusnap will be significantly reduced by the analysis carried out at runtime.

Docusnap User Permissions

If the Docusnap user permissions are enabled, the current user is checked in the Active Directory when Docusnap is started. If multiple domain controllers exist in the domain, a dedicated domain controller can be defined in the *Options* dialog. Only the name of the domain controller must be entered into the text field. For example, if the domain controllers are distributed to multiple sites, the response time for the Active Directory query can be significantly shortened by specifying the local domain controller. This can accelerate the start of Docusnap. If the specified domain controller can not be found, any domain domain controller is used.

Other Settings

For additional information, the creation date and the date of the last change are saved. If you want this data to be included in the overview of the additional information, the display can be activated in the *Options* dialog.

The size of the font in Docusnap can be increased, but this can lead to an incorrect display in some cases.

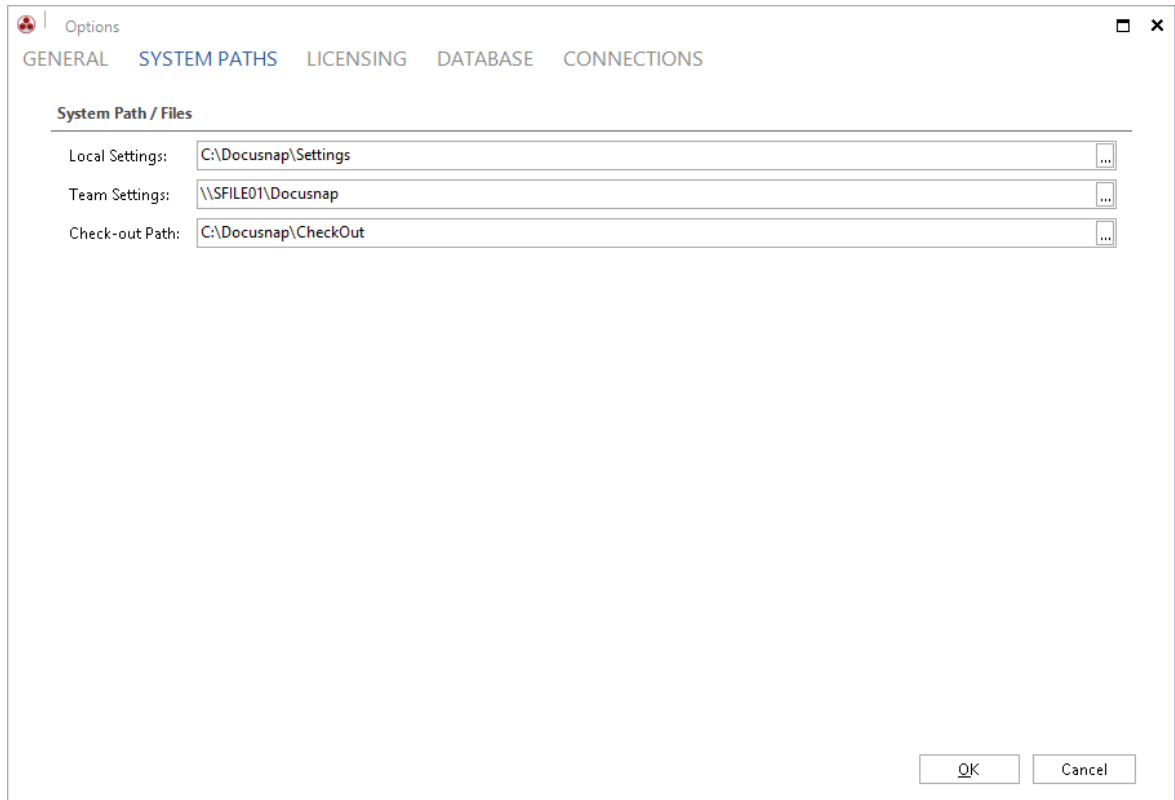
The screenshot shows the 'Options' dialog box with the 'GENERAL' tab selected. The dialog has a title bar with a red icon and 'Options' text. Below the title bar are tabs: 'GENERAL', 'SYSTEM PATHS', 'LICENSING', 'DATABASE', and 'CONNECTIONS'. The 'GENERAL' tab contains four sections: 'General Settings', 'Debugging', 'Docusnap User Permissions', and 'Other Settings'. 'General Settings' includes checkboxes for 'Show Network Maps' and 'Password Logging', and a 'Language' dropdown set to 'English'. 'Debugging' includes a checked 'Enable Debug Mode', a 'Debug Level' dropdown set to 'Log everything', a 'Target Storage Location' dropdown set to 'Database' with a 'Reset Log' button, and an unchecked 'Create Additional Debug Files' checkbox. 'Docusnap User Permissions' has a 'Dedicated Domain Controller' text field. 'Other Settings' has a checked 'Show date of creation and last modification for additional information' checkbox, a 'Font Size' dropdown set to 'Standard', and a warning icon with text: 'Changing the font size can lead to an incorrect display'. At the bottom right are 'OK' and 'Cancel' buttons.

19.1.2 System Paths

System Path / Files

In order to use Docusnap in a multi-user environment, settings can be stored centrally so that they are accessible to each user. These so-called *team settings* will then be loaded from the path defined in the *Team Settings* field. To obtain consistent results, the same team settings path is used for the Docusnap client and Docusnap Server. If the path is changed in the options dialog, it will be changed for the Docusnap Server and vice versa, when both are connected to the same database. If no path was selected for the *Team Settings* or if that path no longer exists, the path specified for the *Local Settings* will be used.

When you create Docusnap extensions (e.g. contracts, passwords, etc.), you can add attachments. Attachments are stored in the Docusnap database. If you need to edit an attachment, it first needs to be loaded from the database and then stored temporarily in a local directory. In the *Check-out Path* field, you can specify the path to be used for this purpose.



19.1.3 Licensing

The *Licensing* page of the Options dialog shows information about the license currently in use. Insert in the Activation Key field the activation key received by e-mail. Click the Activate button, to check the license for validity.



Options

GENERAL SYSTEM PATHS LICENSING DATABASE CONNECTIONS

Product Activation

Activation Key: ✓

An activation key is required to use all features of Docusnap. You receive the activation key by e-mail, once you have completed the registration process on <https://www.docusnap.com/en/buy/shop>.

If you did not receive an email, please contact our [Sales Department](#).

License Information

Product:	Docusnap X Enterprise
Licensed to:	itelio GmbH
Licensed Network Size:	499
Valid until:	01.12.2016

Optional Settings

☒ Participation in the program to improve the ease of use

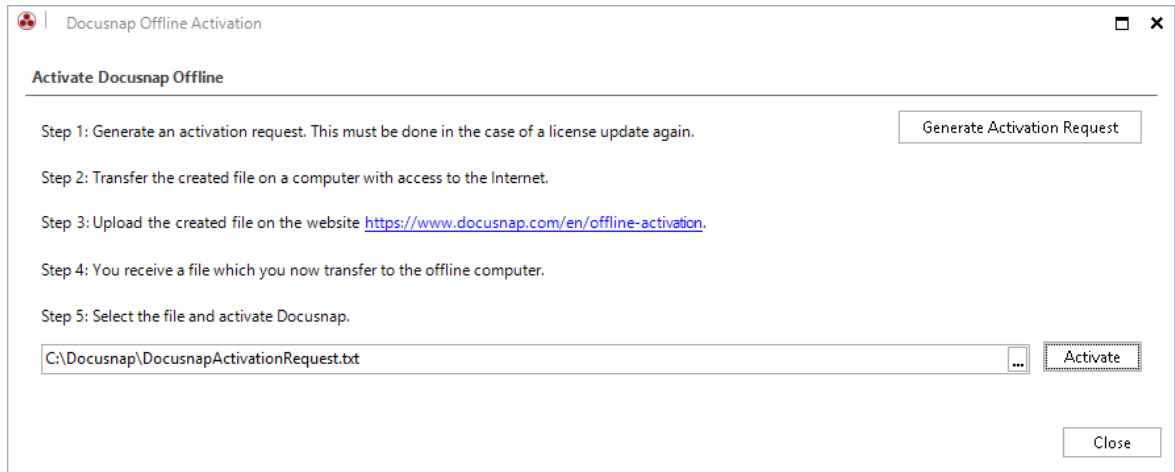
✓ License check successful

By using the offline activation it is possible to operate Docusnap in an isolated environment. In the first step it is necessary to enter the activation code. Then another dialog must be opened by clicking on the *Offline activation* button, by means of which the file (*DocusnapActivationRequest.txt*) can be created. This file which contains the fingerprint of the isolated system.

In a second step, the file *DocusnapActivationRequest.txt* is to be uploaded to the Website <https://www.docusnap.com/en/offline-activation> in order to receive the final license file (*DocusnapOfflineLicense.txt*) for a successful activation of Docusnap.

After selecting the *DocusnapOfflineLicense.txt* within the configuration wizard, Docusnap can be activated by clicking the *Activate* button.

Should modifications to the license setup be required, such as the extension of the number of licensed systems, the complete process of generating an activation request file, uploading it and importing the license file has to be repeated. Accordingly, the same steps are required if, for example, the virtual machine was reset.



19.1.4 Database

On the *Database* page of the Options dialog, you can specify the database where the data will be stored. Docusnap supports Microsoft SQL Server and LocalDB.

SQL Server Database

In addition to the Microsoft SQL Server retail products (Standard 2005/2008 & Enterprise 2005/2008), the Express versions (2005/2008) of SQL Server are also supported.

When using an SQL Server in your network, make sure that the server has been configured for remote access via TCP/IP and that the permissions for Windows or SQL authentication have been set properly.



The screenshot shows the 'Options' dialog box with the 'DATABASE' tab selected. The 'Microsoft SQL Server Database' section has the 'Use Local Database' checkbox unchecked. The 'Authentication' dropdown is set to 'Windows-Authentication'. The 'SQL Server' dropdown shows 'sdevsql01', 'User Name' is empty, and 'Database' is 'Docusnap'. The 'Password' field is empty. A green progress bar indicates 'Metaschema updated successfully'. Below this, the 'Settings' section shows 'Query Timeout in Seconds' set to 60, 'Database Archive Versions' set to 4, and 'Optimize Database Manually' set to 'Start'. The 'Encryption Module' section has 'Encryption' set to 'Select Existing File' and the 'Encryption File' path is 'C:\Docusnap\DocusnapEncryption.dcr'. At the bottom, a yellow status bar shows a green checkmark and the text 'Database opened successfully'. Buttons for 'Connect', 'Create', 'OK', and 'Cancel' are visible.

LocalDB

The LocalDB is a lightweight version of SQL Server, which can be used without complex or time consuming configuration. When installing Docusnap it can be decided whether the LocalDB should be installed too.

By clicking the checkbox *Use LocalDB* the existing LocalDB instance for Docusnap is selected.



The files for the LocalDB databases are stored in the user profile. It is recommended that LocalDB only be used for smaller databases.

Options

GENERAL SYSTEM PATHS LICENSING DATABASE CONNECTIONS

Microsoft SQL Server Database

☒ Use Local Database Authentication: Windows-Authentication

SQL Server: (localdb)\docusnap User Name:

Database: Docusnap Password:

Metaschema updated successfully

Settings

Query Timeout in Seconds: 60 Database Archive Versions: 4

☐ Suppress Automatic Database Optimization Optimize Database Manually: Start

Last Database Optimization: 22.11.2016 09:46:15

Encryption Module

Encryption: ☐ Disabled ☒ Select Existing File ☐ Create New File

Encryption File: C:\Docusnap\DocusnapEncryption.dcr

Database opened successfully



When creating a database, the following settings are used:

Recovery Model: Simple

Data Files: Initial Size: 50 MB; Autogrowth: 50 MB

Log: Initial Size: 40 MB; Autogrowth: 10 MB

Settings

By default, the timeout for database queries is 30 seconds. For large databases, however, it may happen that database queries take longer. To execute these queries nonetheless, the query timeout can be increased.



The change of the Timeout will be stored in a configuration file located on the computer where Docusnap is running and will be used for every connection to a database.

The value specified in the *Database Archive Versions* field determines how many inventory scans of an object will be stored. If you set the *Database Archive Versions* field to 4, this means that the data of four inventory scans, e.g. for a Windows server, will be kept. When you perform the next inventory scan of that server, the scan with the oldest timestamp will be deleted so that the total number of inventory scans remains four. If particular inventory scans should not be deleted, you can exclude them from the automatic deletion using the [Manage Snapshots](#) dialog.



With the database optimization the indexes of the database are re-created, if necessary, in order to improve the database performance. The automatic optimization can be turned off via the checkbox *Suppress Automatic Database Optimization*. In addition the optimization can be started manually by clicking on the *Start* button.

Encryption Module

In order to enable the *Passwords* module in the main window, you need to create an encryption file. Encryption ensures that the passwords will be stored in the database in encrypted form. These passwords can only be read by users who use the same encryption file. If you do not create an encryption file, the *Passwords* module will remain hidden.

Make sure to treat the encryption file with great care, since it is not possible to replace or re-create this file should it become lost.

19.1.5 Connections

Update Options

If the *Check for Updates on Startup* checkbox is enabled, Docusnap checks for new updates each time you start the program. To avoid the update check upon startup, clear the *Check for Updates on Startup* checkbox. The Update feature can also be started during program operation by clicking the *Update* button in the Docusnap Menu.

To update Docusnap even on systems that do not have an Internet connection, check the checkbox *Download both Docusnap Versions (x64 and x86)* to save the current Version during the next update in the Team Settings path. The next time Docusnap is started on a system without internet connection, the appropriate Docusnap version (x62 or x86) from the team settings will be installed.

In the *Timeout* field, you can specify (in seconds) how long the update routine will try to connect to the update server before a timeout occurs.

Proxy Server

By default, the proxy server set in the Internet Options of your machine will be used. If a different proxy server should be used for the update process, specify the details for this server in the Proxy Server group.

Server API Connection

The Server API connection is necessary for scheduling and processing jobs for Docusnap Server and Discovery Service. The URL must match the [Docusnap Server](#) setting in the *Server API* step.

The screenshot shows the 'Options' dialog box with the 'CONNECTIONS' tab selected. The 'Update Options' section includes a checked checkbox for 'Check for Updates on Startup' and an unchecked checkbox for 'Download both Docusnap Versions (x64 and x86)'. The 'Timeout' is set to 3 seconds. The 'Proxy Settings' section has three radio buttons: 'Do not Use Proxy' (selected), 'Use System Settings', and 'Set up Manually'. Below these are fields for 'Address', 'Port' (8080), 'User', and 'Password'. The 'Server API Connection' section has a checked checkbox for 'Enable Server API Connection', a 'URL' field containing 'http://V008:9001/', a 'Transport' dropdown set to 'Auto', and a 'Timeout' field set to 30 seconds. There are 'Test Connection', 'OK', and 'Cancel' buttons at the bottom right.

19.2 Layout (CI)

For some modules such as Reporting, Documentation or IT Concepts, you need to select the design to be used. In the Layout (CI) dialog, you can select a common design to be applied to all modules. In addition, you can change the settings for reports and IT concepts. All changes made to settings are only valid on the current computer.

Additionally it is possible to define the design specifically for one company. These settings will be saved in the database and will always be available when Docusnap is connected to this database.

Click the *Layout (CI)* button in the *Documents* ribbon to open the dialog.

19.2.1 Designs

On the Designs page, you can select one of several predefined designs. The design you select here will be applied to reports and datasheets.

Additionally, you can select a customized image (company logo) in this dialog. This image will be shown in the header of the various documents and reports.

On the one hand you can select the design in general and on the other hand you can choose a design specifically for one company. In the combobox you can choose *General* or the name of the company for which the design should be saved.

Additional user-defined designs can be added in Docusnap Management.

The screenshot shows the 'Define Company Settings' dialog box with the 'DESIGN' tab selected. The 'Designs' section includes a color palette with various color swatches like Black, Red, Orange, Yellow, Green, Blue, etc. The 'Company Logo' section shows a preview of the 'itelio' logo and buttons for 'Select', 'Remove Logo', and 'Reset'. The 'Microsoft Office Excel Settings' section has a 'Table style' dropdown. The 'Save' and 'Close' buttons are at the bottom right.

Confirm the settings by clicking the *Save* button. If you switch to another company after modifying a setting without saving, the settings for the previously selected company will be reset. By clicking the *Close* button you close the dialog.

19.2.2 Report Settings

The report title is shown in the header. In addition, the header may include a logo. Page numbers will be inserted in the footer. The cover page will include the report title, a description (if specified), the report creation date, the author and the page count. By clicking the **Design** button, you can open the report in the Designer to customize it.

Using the *Show Cover*, *Show Header* and *Show Footer* checkboxes, you can specify whether those report elements will be included in the report.

Company Design

If a company is selected in the combobox, you can select one of the following Status settings: *Master Settings*, *Do not Use* or *Individual Settings*.

■ Master Settings

If you select the Master Settings option, the system uses the default specified for the general use. If you only want to change the color of the header, footer or cover page for the selected company, it is sufficient to customize the design from the *Design* page.

■ Do not Use

If you select the *Do not Use* setting, the header, footer and cover page will not be used in the reports.

■ Individual Settings

If you select the *Individual Settings* option, you can create a company-specific report with a customized header, footer and cover page. Click the **Design** button to open the current report template and adjust it for the selected company. The adjustments on the company level are stored in the database.

Define Company Settings

General DESIGN DOCUMENTS

Cover, Header and Footer for Reports

Status: Master Settings

German: Master ... Design

English: Master ... Design

Report Display Options

☒ Show Cover

☒ Show Header

☒ Show Footer

Page Setup

Paper Size: A4

Top Margin: 10 mm

Bottom Margin: 10 mm

Left Margin: 20 mm

Right Margin: 10 mm

OK Cancel

19.3 Permissions

DocuSnap features an integrated user management. The User Management feature enables you to grant users access to the DocuSnap controls and features and allows them to use extensions. User management will be enabled once you have created

and saved the first user in the Docusnap Management. If no users have been defined, any user who connects to this database may use all of the controls and the entire Docusnap functionality.

Additionally you can control who has access to which data individually. The permissions are assigned on the object in the tree views. Permissions can be set at the record or object level. This means that a user may only process data of a certain workstation or of all workstations.


If permissions to an object have not been set, all users can process all entries. As soon as an object has been assigned a permission, this permission becomes active and only users to whom the corresponding role has been assigned will be able to see these entries.

To open the *Object Permissions* dialog, select the desired object in the tree view, right-click and select *Permissions* from the context menu.

The dialog displays all roles that are currently defined in the Docusnap database. Both the object selected in the tree view as well as the type of the object are displayed below the role node. Permissions set for the selected object will only apply to this single object. However, if you set permissions for the object type, they will apply to all objects assigned to that type, e.g. to all workstations. In case you have defined permissions for a *related type* object type, these permissions on the type level will apply to the *related type* as well.

The permissions are granted additively. This means that, if a user is granted a permission for a certain role, and the same permission has not been set for another role he is assigned to, the permission will be granted all the same. The highest permission level is the one that matters.

The following permissions can be granted in this dialog: *Read*, *Write*, *Delete* and *Insert*. If the *Read* permission is granted, the entries in the tree view will be displayed. If the *Write*, *Delete* and *Insert* permissions are granted, the *Save*, *Delete* and *New* buttons on the ribbon will be enabled. To enable the *Save*, *Delete* and *New* buttons, the user must also be assigned a role which has the right to use these buttons.

 Object Permissions □ ×

Roles and Target Objects	Write	Delete	Read	Insert
<input checked="" type="checkbox"/> Administration				
Type: Infrastructure	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Object: Infrastructure	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Customizing				
Type: Infrastructure	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Object: Infrastructure	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Inventory				
Type: Infrastructure	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Object: Infrastructure	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> IT Documentation				
Type: Infrastructure	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Object: Infrastructure	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> IT Relations				
Type: Infrastructure	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Object: Infrastructure	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> License Management				
Type: Infrastructure	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Object: Infrastructure	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/> Organization				
Type: Infrastructure	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Object: Infrastructure	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Permission Analysis				
Type: Infrastructure	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Object: Infrastructure	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> User Management				
Type: Infrastructure	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Object: Infrastructure	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Close Cancel

Part

XX

20 Data Organization and Analysis

The Data Organization and Analysis section covers Docusnap features that enable you to analyze and organize the collected data.

Comparing Data

Using the Compare Data function, you can compare the data resulting from two scans (snapshots) to find the differences.

Managing Snapshots

Using the Manage Snapshots feature, you can delete individual snapshots or flag them as undeletable.

System Groups

Using the Docusnap System Groups feature, you can group systems logically and create network maps for partial networks based on particular system groups.

ADS Synchronization

Using the Active Directory Synchronization feature, you can make sure that the Docusnap database does not contain any Windows systems that no longer exist in the Active Directory.

Database Import

Using the Database Import feature, you can import Docusnap databases into other Docusnap databases.

Database Export

Using the Database Export feature, you can export the content of the current Docusnap database into another Docusnap database.

Moving Systems

Using the Docusnap Move feature, you can move systems from one domain to another.


Merging Systems

In Docusnap, you can merge the data resulting from the inventory of different systems into one single system.

20.1 Comparison

Using the *Compare Data* feature, you can compare system configurations at various points in time.

Multiple snapshots can be compared with each other. The differences found by the comparison will be shown in a report. You can only open the *Compare Data* dialog after selecting a node in the tree view.

To open the *Compare Data* dialog, click the  button at the top of the tree view.

The Start Point indicates the node where the comparison will begin.

A tree can have many levels. In order to compare only a certain number of levels, you can specifying a limit value in the *Levels* field. To compare all levels, tick the *Compare all Levels* checkbox. If you want to restrict the comparison to the differences, enable the *Show only Differences* checkbox. The captions will, however, always be shown in order to clarify the structure.

The changes will be highlighted in color according to the following pattern:

Changed	red
New	green
Deleted	blue
Unchanged	black

If the *Show only Differences* option has not been checked, the final report will include all data (even the unchanged ones).

By checking the checkbox *Remove structural elements without content* captions of areas, where no differences were identified, are removed from the report. As a result, the number of pages of the report can be reduced.

The available snapshots for the selected nodes are displayed in two lists. Docusnap always displays the snapshots that are located at the same level as the selected node or below it. If you select a node for which no corresponding snapshots exist, Docusnap will provide the snapshots that are located above that node for comparison.

In order to obtain relevant results, you should only compare snapshots resulting from scans of the same systems. When you click the *Compare* button, the snapshots will be compared and the results will be shown in a report. To cancel a running comparison, click the *Cancel* button. To close the dialog, click the *Close* button.

Compare Data

Start Point: WMWS0064

Levels: ☐ Compare all Levels ☒ Show only Differences

☐ Remove structural elements without content

	SCAN DATE	SNAPSHOT NAME	DESCRIPTION	DOMAIN NAME	DELETABLE	SNAPSHOT CON...
	02.12.2016 10:41:23	Inventory from 0...		docusnap.intern	Yes	WMI AD EXCH
	02.12.2016 13:05:54	Inventory from 0...		docusnap.intern	Yes	WMI
	09.12.2016 09:12:53	Inventory from 0...		docusnap.intern	Yes	WMI
	23.12.2016 12:30:33	Inventory from 2...		docusnap.intern	Yes	WMI
	18.01.2017 15:16:37	Inventory from 1...		docusnap.intern	Yes	WMI
	18.01.2017 15:19:24	Inventory from 1...		docusnap.intern	Yes	WMI

	SCAN DATE	SNAPSHOT NAME	DESCRIPTION	DOMAIN NAME	DELETABLE	SNAPSHOT CON...
	02.12.2016 10:41:23	Inventory from 0...		docusnap.intern	Yes	WMI AD EXCH
	02.12.2016 13:05:54	Inventory from 0...		docusnap.intern	Yes	WMI
	09.12.2016 09:12:53	Inventory from 0...		docusnap.intern	Yes	WMI
	23.12.2016 12:30:33	Inventory from 2...		docusnap.intern	Yes	WMI
	18.01.2017 15:16:37	Inventory from 1...		docusnap.intern	Yes	WMI
	18.01.2017 15:19:24	Inventory from 1...		docusnap.intern	Yes	WMI

The report can be exported from the [Reporting](#) ribbon. For the export, several file formats are available. You can select the desired format by clicking the *Export* button. When you click a format, a dialog appears where you can specify the range of report pages to be exported. Click the plus sign to expand the settings dialog. Then, you can select format-specific settings. If you want the file to open automatically after it has been saved, enable the *Open After Export* checkbox.

20.2 Snapshot Management

To open the Manage Snapshots dialog, click the *Snapshots* button on the *Extras* ribbon.

Each time you perform an inventory scan, Docusnap creates a snapshot. Its name is *Inventory from*, with the current timestamp appended to it. This dialog lists all snapshots that have been saved to the database. If required, you can rename a snapshot. Enter the new name in the *Name* field.

You can add a description to each snapshot. If you want to compare two snapshots, the descriptions can be very helpful in selecting the correct ones.

In Docusnap, only a certain number of snapshots is saved for each system. You can set this number in the [Options](#) dialog. If this number is exceeded, the oldest snapshots will be deleted. If you want to retain a snapshot, exclude it from the automatic deletion process by clearing the *Scan is Deletable* checkbox. Undeletable snapshots will not be counted among the number of archived snapshots.

To delete a snapshot, select it and then remove it from the database by clicking the *Delete* button.



When you delete a snapshot, all associated data will be deleted along with it!

Manage Snapshots

	SCAN DATE	SNAPSHOT NAME	DESCRIPTION	DOMAIN NAME	DELETABLE	SNAPS
	9/8/2016 9:11:20 AM	Inventory from 09/08/2016		dsra.local	Yes	Sharepc
	9/8/2016 9:18:32 AM	Inventory from 09/08/2016		dsra.local	Yes	VMWar
	9/8/2016 9:49:27 AM	Inventory from 09/08/2016		dsra.local	Yes	SNMP
	9/8/2016 12:24:08 PM	Inventory from 09/08/2016		dsra.local	Yes	ThinCli
	9/8/2016 12:36:41 PM	Inventory from 09/08/2016		dsra.local	Yes	HpUx
	9/8/2016 12:54:08 PM	Inventory from 09/08/2016		dsra.local	Yes	IIS
	9/8/2016 1:13:56 PM	Inventory from 09/08/2016		dsra.local	Yes	DNS
	9/8/2016 1:22:14 PM	Inventory from 09/08/2016		dsra.local	Yes	DHCP
	9/8/2016 1:55:07 PM	Inventory from 09/08/2016		dsra.local	Yes	SQL
	9/8/2016 1:57:21 PM	Inventory from 09/08/2016		dsra.local	Yes	Isilon
	9/12/2016 1:10:54 PM	Inventory from 09/12/2016		dsra.local	Yes	AD
	9/12/2016 1:12:17 PM	Inventory from 09/12/2016		dsra.local	Yes	DFS
	9/12/2016 1:23:54 PM	Inventory from 09/12/2016		dsra.local	Yes	WMI
	9/12/2016 1:31:45 PM	Inventory from 09/12/2016		dsra.local	Yes	BE
	9/12/2016 1:32:50 PM	Inventory from 09/12/2016		dsra.local	Yes	VEEAM
	9/12/2016 1:36:15 PM	Inventory from 09/12/2016		dsra.local	Yes	EXCH
	9/12/2016 1:56:51 PM	Inventory from 09/12/2016		dsra.local	Yes	MAC
	9/12/2016 2:45:10 PM	Inventory from 09/12/2016		dsra.local	Yes	NTFS
	9/12/2016 6:36:01 PM	Inventory from 09/12/2016		dsra.local	Yes	SNMP
	10/26/2016 2:32:54 PM	Inventory from 10/26/2016		dsra.local	Yes	WMI
	10/26/2016 2:47:01 PM	Inventory from 10/26/2016		dsra.local	Yes	WMI

Name:
☒ Inventory is Deletable
Report

Description:

Delete
Save
Close

20.3 System Groups

The purpose of system groups is to document individual portions of a network. When creating the [documentation](#), you can define the groups to be included.

To open the Manage System Groups dialog where you can manage system groups, click the *System Groups* button on the *Inventory* ribbon. To create the System Groups open the Docusnap Management or click the *New System Group* button.

All existing groups are listed in the top pane and may be selected for editing.



Manage System Groups

+ New System Group - Delete System Group



GROUP NAME	COMPANY	DOMAIN
Development	Docusnap	docusnap.internal
Management	Docusnap	docusnap.internal
Support	Docusnap	docusnap.intern

NAME	TYPE
192.168.100.233	SNMP
192.168.100.249	SNMP
afwutm01.intern.local	SNMP
ASWIT001	SNMP
ASWIT002	SNMP
ASWIT003	SNMP
ASWIT004	SNMP
ASWIT009	SNMP
ASWIT010	SNMP
ASWIT012	SNMP
ASWIT013	SNMP
ASWIT014	SNMP
ASWIT015	SNMP
cifs	CIFS
CLI4730DG	SNMP
CLI4730EG	SNMP

NAME	TYPE
ASANSW01	SNMP
ASANSW02	SNMP
ASANSW03	SNMP
ASANSW04	SNMP
SBEX0001	Server
SBPS0001	Server
WKNR0005	Workstation
WLWS0088	Workstation
WMWS0113	Workstation
WMWS0703	Workstation

Save Close

After the group has been saved, or an already saved group has been selected, all systems existing in the selected domain will be displayed in the table on the left of the dialog. In order to find a certain system to be included in the system group, you can filter the list of systems.

To add systems to the current system group, select them in the left table and click  to move them to the right table. All systems listed in the right table belong to this system group. To remove one or more systems from the group, select them and click the  button to move them to the left table.

Save the changes made to the systems in this group by clicking the *Save* button at the top of the dialog. To close this dialog, click the *Close* button.

20.4 ADS Comparison

The ADS Synchronization feature compares the inventoried systems with the systems existing in the Active Directory. When this process has completed, Docusnap will display the computers that are no longer present in the Active Directory system, but still listed in the Docusnap database. From that dialog, you can determine whether these computers are to be deleted from the Docusnap database as well or not. Docusnap will not modify the Active Directory system.

To start the wizard, click the *ADS Synchronization* button on the *Inventory* ribbon.

Company Selection

In the first step, select the company where the domain to be synchronized is located. As this process consists in comparing data from an existing company, you cannot create a new company from the ADS Synchronization wizard.

Inventarisierung

1 2 3 4 5

Firmenauswahl Authentifizierung Windows Systeme Zusammenfassung Zeitplanung

Wählen Sie bitte die gewünschte Firma aus, oder legen Sie eine neue an: ☒ Firma auswählen ☐ Neue Firma erstellen

Docusnap

Authentication

In the second step, you need to select the domain to be synchronized. Select the desired domain in the *Domain* combo box. Then, enter valid credentials for this domain in the *User Name* and *Password* fields. Next, you need to check whether the user is a member of the domain and the password is correct by clicking the *Check Credentials* button. Only if this check is OK, the *Next* button will be available. If you do not specify a user name, the authentication will be performed based on the current user's login data. If you enable the *Save Username and Password* checkbox, this information will be stored for the next synchronization process.

Inventory

1 2 3 4 5

Company Selection **Authentication** Windows Systems Summary Scheduling

Authentication

Refresh Edit Discovery Service Server Connection

	DISCOVERY SERVICE	HOST NAME	PLUGIN VERSION
<input type="checkbox"/>	Server-vpc-kfi	vpc-kfi	10.0.583.3
<input checked="" type="checkbox"/>	Client-vpc-kfi	vpc-kfi	10.0.583.3

Domain: docusnap.intern

User Name: docusnap\Administrator

Password: *****

☒ Save User Name and Password

Check Credentials

Windows Systems

When you click the *Start Search* button, Docusnap will compare the inventoried Windows computers with the Active Directory system. To abort this process, click the *Cancel* button.

When the search is complete, all Windows computers that have been scanned by Docusnap before, but no longer exist in the Active Directory system, will be

displayed in the table. If the checkbox next to a system is enabled, this system will be deleted from the Docusnap database in the next step. By default, all systems are selected.

The table can be filtered using the Filter functions. For more information on filtering, see the [Filters](#) section.

Under *Select*, you can either select or deselect all devices.

Inventory

1 2 3 4 5

Company Selection Authentication **Windows Systems** Summary Scheduling

☒ Synchronize Windows Systems

Start Search at:

<input checked="" type="checkbox"/>	NAME	TYPE	PASSWORD AGE (DAYS)
<input checked="" type="checkbox"/>	172.31.6.1	Offline	0
<input checked="" type="checkbox"/>	172.31.3.130	Offline	0
<input checked="" type="checkbox"/>	172.31.17.16	Offline	0
<input checked="" type="checkbox"/>	172.31.3.106	Offline	0
<input checked="" type="checkbox"/>	172.31.3.125	Offline	0
<input checked="" type="checkbox"/>	172.31.254.129	Offline	0
<input checked="" type="checkbox"/>	172.31.2.7	Offline	0
<input checked="" type="checkbox"/>	172.31.2.6	Offline	0
<input checked="" type="checkbox"/>	172.31.2.4	Offline	0
<input checked="" type="checkbox"/>	172.31.2.31	Offline	0
<input checked="" type="checkbox"/>	172.31.3.102	Offline	0
<input checked="" type="checkbox"/>	VPC-SQ16	Server	0
<input checked="" type="checkbox"/>	DSFS01	Server	0
<input checked="" type="checkbox"/>	VPC-GSA	Workstation	0
<input checked="" type="checkbox"/>	VPC-KFI	Workstation	0
<input checked="" type="checkbox"/>	VPC-KRE	Workstation	30

Select

- ☒ Select all
- ☐ Deselect all

Other

- Excel Export
- Enable Filter

All systems of this domain, which are not in the Active Directory, will be deleted from the dat... 2

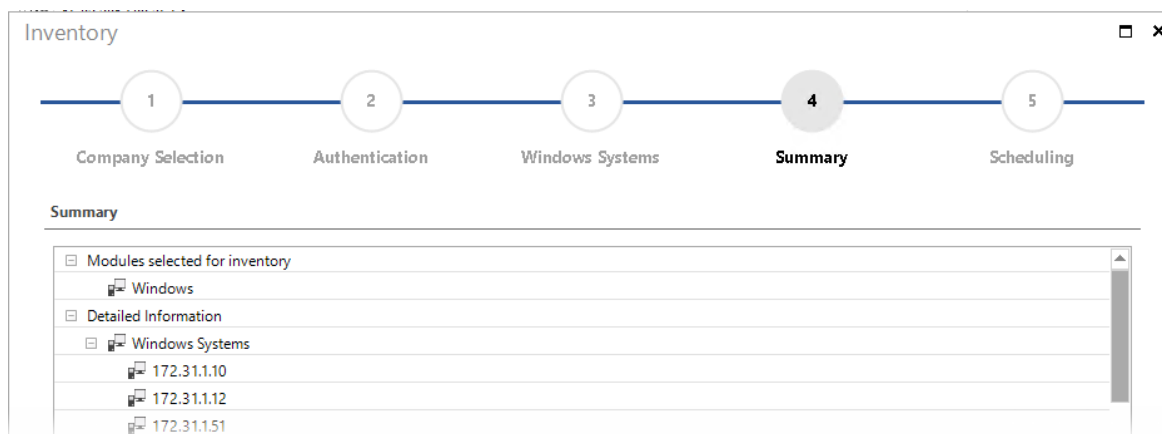


All systems of a domain that have been scanned during an IP Segment inventory process or that belong to a system group will also be deleted.

For this reason, it is recommended to create a separate domain for system groups if you do not want to delete them.

Summary

When you click the *Next* button, the next step displays where you can see all systems marked for deletion.



Scheduling

Through Scheduling, you can specify that the ADS Synchronization routine will start automatically at a later point in time. In the *Scheduling* step, you can define whether the ADS Synchronization routine will be a one-time or a recurring event. Please note, however, that this feature can only be used if the Docusnap Server is installed on a system in the network.

Status

Once you started deleting the devices, the dialog will display the progress of the deletion process. To abort this process, click the *Cancel* button. All systems with the *Completed* status have been deleted from the database. Systems for which the deletion process has not been completed yet remain in the database.

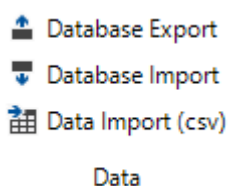
Final Report

On the Report page, you can see which computers have been deleted successfully. To close the wizard, click the *Close* button.

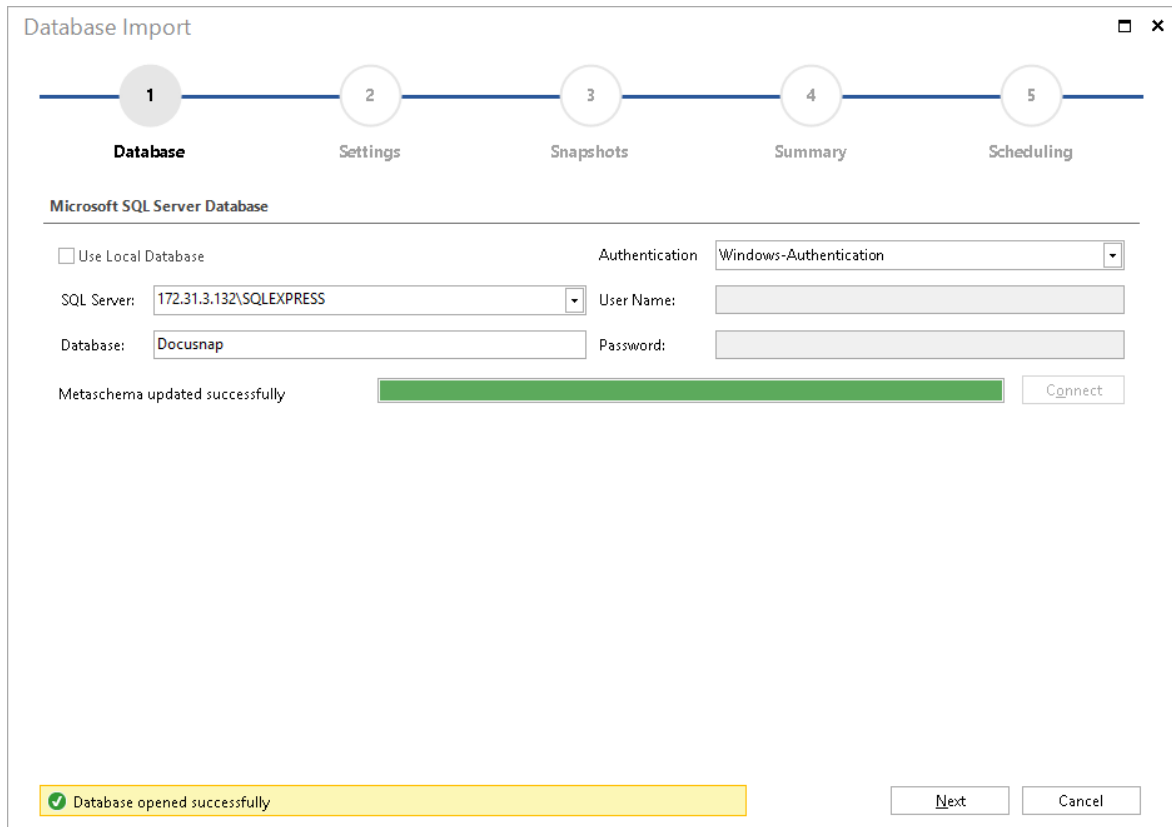
20.5 Database Import

Docusnap allows you to export data for import into another database. This way, it is possible to get the data from a temporary database on a notebook into a central database.

To open the Database Import dialog, click the *Database Import* button on the *Data* ribbon.



In the first step, you need to select a source database from which the data will be imported. For this purpose, you can select an SQL or a local database. These two database systems are fully compatible with each other. This means that data exported from an SQL database can be imported into a local database, and vice versa.



In the next step, select the import settings. The companies and domains that exist in the database to be imported are displayed on the left. The companies existing in the target database are displayed on the right. You can import an entire company, or an individual domain into the target database. As you go, you can either import the domain data to an existing company, or you can re-create the original company from the source database.

For the target database, you can decide to re-create the company from the source database in the target database or to integrate the data into an existing company. If you select the *Integrate Company from Source Database* option, a new company will be created. If a company with the same name already exists, a second company with this name will be created.

If you select the *Integrate in an existing Company* option, the exported data will be integrated into the selected company.



When assigning companies automatically, Docusnap does not compare by company name, but rather uses an internal GUID (Globally Unique Identifier). This may result in two companies


existing with the same name after the export. The best method is to select a company in the target database explicitly.

During the import process, Docusnap will check whether a specific snapshot has already been imported. If this is the case, this snapshot will be excluded from the import process. Furthermore, Docusnap will check for each system whether the number of allowed archives will be exceeded. The oldest snapshots will be deleted, if necessary.

To import [additional information](#) associated with source database objects, enable the *Import Additional Information* checkbox in the *Advanced* group.

If you enable the *Overwrite existing Data* checkbox, the properties of static objects from the source database will overwrite those existing in the target database. Thus, for example, the street address of a company that has been selected in the source database would overwrite the street address in the target database. Please note that this feature will only affect static objects and not the snapshots.

If you wish to import the diagrams that exist in your database, enable the *Import Diagrams* checkbox.

In addition, you can import any passwords that have been created. For this purpose, an encryption file is required. To select it, click the  icon and select the file. Its name will then be displayed in the *Import Encryption File* field.

If you want to exclude certain source database modules from the import, clear the checkmark for those you do not want. If, for example, only the Windows checkbox is enabled, nothing but the workstation and server data will be imported. In addition, only snapshots containing data for the selected modules will be displayed in the next step.

The screenshot shows the 'Database Import' dialog box with five steps: 1. Database, 2. Settings (current), 3. Snapshots, 4. Summary, and 5. Scheduling. The 'Source Database: Company / Domain Selection' section shows a tree view with 'itelio GmbH' expanded, listing several domains including '2k12.local', '2k16.ds.local', 'bulk.docusnap.intern', 'docusnap.intern', 'docusnap.internal', 'rd.docusnap.intern', and 'Test'. The 'Target Database' section has two radio buttons: 'Integrate Company from Source Database' (unselected) and 'Integrate in Existing Company' (selected), with 'Docusnap AG' listed below. The 'Import Options' section includes an 'Import Encryption File' field and a list of modules: Active Directory, Windows, SNMP, CIFS, Linux, Mac, and DNS Server, all of which are checked. At the bottom are 'Back', 'Next', and 'Cancel' buttons.

Here, a list of snapshots from the selected source database is displayed. To find snapshots more quickly, you can either [name](#) them when doing the inventory scan, or you can assign a name to them in the [Manage Snapshots](#) dialog. To the right of the snapshot list, a [filter](#) is available for easier selection of individual snapshots.



If the number of archives has been set to 4 in the Options dialog and the source database contains, for example, seven snapshots with WMI data, the 3 oldest snapshots will not be imported!

Database Import

1 2 3 4 5

Database Settings **Snapshots** Summary Scheduling

Snapshot Selection

<input checked="" type="checkbox"/>	SCAN DATE	SNAPSHOT NAME	DESCRIPTION	DOMAIN NAME	DELETABLE	SNAPSHOT CON...	SCHEDULED
<input checked="" type="checkbox"/>	27.07.2016 10:11:33	Manual Systems			Yes		
<input checked="" type="checkbox"/>	27.07.2016 10:11:24	Inventory from 2...		docusnap.intern	Yes	SQL	
<input checked="" type="checkbox"/>	27.07.2016 13:37:26	Inventory from 2...		docusnap.intern	Yes	SQL	
<input checked="" type="checkbox"/>	28.07.2016 09:51:51	Inventory from 2...		docusnap.intern	Yes	NTFS	
<input checked="" type="checkbox"/>	28.07.2016 14:37:43	Inventory from 2...		docusnap.intern	Yes	WMI	
<input checked="" type="checkbox"/>	28.07.2016 15:01:02	Inventory from 2...		docusnap.intern	Yes	NTFS	
<input checked="" type="checkbox"/>	29.07.2016 13:52:02	Inventory from 2...		docusnap.intern	Yes	NTFS	
<input checked="" type="checkbox"/>	04.08.2016 08:02:51	Inventory from 0...		docusnap.intern	Yes	VEEAM	
<input checked="" type="checkbox"/>	04.08.2016 08:03:49	Inventory from 0...		docusnap.intern	Yes	VEEAM	
<input checked="" type="checkbox"/>	04.08.2016 08:49:05	Inventory from 0...		docusnap.intern	Yes	VEEAM	
<input checked="" type="checkbox"/>	05.08.2016 06:00:00	Inventory from 0...		docusnap.intern	Yes	SQL	
<input checked="" type="checkbox"/>	12.08.2016 06:00:01	Inventory from 1...		docusnap.intern	Yes	SQL	
<input checked="" type="checkbox"/>	12.08.2016 08:41:50	Inventory from 1...		docusnap.intern	Yes	DHCP	
<input checked="" type="checkbox"/>	13.08.2016 07:00:01	Inventory from 1...		docusnap.intern	Yes	DNS	
<input checked="" type="checkbox"/>	13.08.2016 08:00:00	Inventory from 1...		docusnap.intern	Yes	DHCP	
<input checked="" type="checkbox"/>	16.08.2016 12:39:49	Inventory from 1...		docusnap.intern	Yes	SNMP	
<input checked="" type="checkbox"/>	16.08.2016 12:44:58	Inventory from 1...		docusnap.intern	Yes	SNMP	
<input checked="" type="checkbox"/>	17.08.2016 06:31:09	Inventory from 1...		docusnap.intern	Yes	SNMP	

Back Next Cancel

Finally, a summary page provides an overview of the modules and snapshots to be imported. If you want to change any of the data import settings, click the *Back* button. Click the *Next* button to switch to the *Scheduling* step.

Database Import

1 2 3 4 5

Database Settings Snapshots **Summary** Scheduling

Summary

- Modules selected for import
 - Windows
 - CIFS
 - Mac
 - Linux
 - SNMP
 - Active Directory
 - DNS Server
 - DHCP Server
 - VMware Infrastructure
 - SQL Server
 - Exchange Server
 - NTFS Permissions
- Import Options
 - Import Extensions (Finance Data, Comments, Passwords, Contracts, Reminders)
- Snapshots selected for import
 - Manual Systems
 - Inventory from 27.07.2016 12:12:12
 - Inventory from 27.07.2016 16:06:52

Back Next Cancel

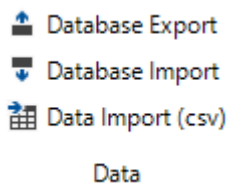
Through Scheduling, you can specify that the Data Import routine will start automatically at a later point in time. In the *Scheduling* step, you can define whether the import will be a one-time or a recurring event. Please note, however, that this feature can only be used if the Docusnap Server is installed on a system in the network. If the data import is scheduled, the schedule is saved by clicking on the *Finish* button and the wizard closes. If the checkbox *Schedule Database Import* was not activated, click the *Start* button to start the import process.

During the database import, its status will be displayed. To abort the import process, click the *Cancel* button. The data that has been imported up to that moment will be retained in the target database. Finally, the Report page will be displayed.

20.6 Database Export

With Docusnap, you can import data from another database.

To perform a data import, click the *Database Export* button on the *Data* ribbon.



In the first step, select the target database to which the data is to be exported. For this purpose, you can select an SQL or local database. These two database systems are fully compatible with each other. This means that data exported from an SQL database can be imported into a local database, and vice versa.

Database Export

1 Database 2 Settings 3 Snapshots 4 Summary 5 Scheduling

Microsoft SQL Server Database

☐ Use Local Database Authentication: Windows-Authentication

SQL Server: 172.31.3.131\SQLEXPRESS User Name:

Database: DocusnapX Password:

Metaschema updated successfully

Connect Create

Database opened successfully

Next Cancel

In the next step, specify the export settings. The left column lists the companies and domains that are found in the database to be exported. The companies existing in the target database are displayed on the right. You can export an entire company or an individual domain to the target database. As you go, you can either export the domain data to an existing company, or you can re-create the original company from the source database.

For the target database, you can decide to re-create the company from the source database in the target database or to integrate the data into an existing company. If you select the *Integrate Company from Source Database* option, a new company will be created. If a company with the same name already exists, a second company with this name will be created.

If you select the *Integrate in existing Company* option, the data will be integrated into the selected company.



When assigning companies automatically, Docusnap does not compare by company name, but rather uses an internal GUID (Globally Unique Identifier). In some cases, two companies with the same name might exist after the import.

The best way to avoid this situation is to explicitly select a company in the target database.


During the export, Docusnap will check whether a specific snapshot was exported before. If this is the case, the corresponding snapshot will be excluded from the

export. Furthermore, Docusnap will check for each system whether the number of allowed archives will be exceeded. The oldest snapshots will be deleted, if necessary.

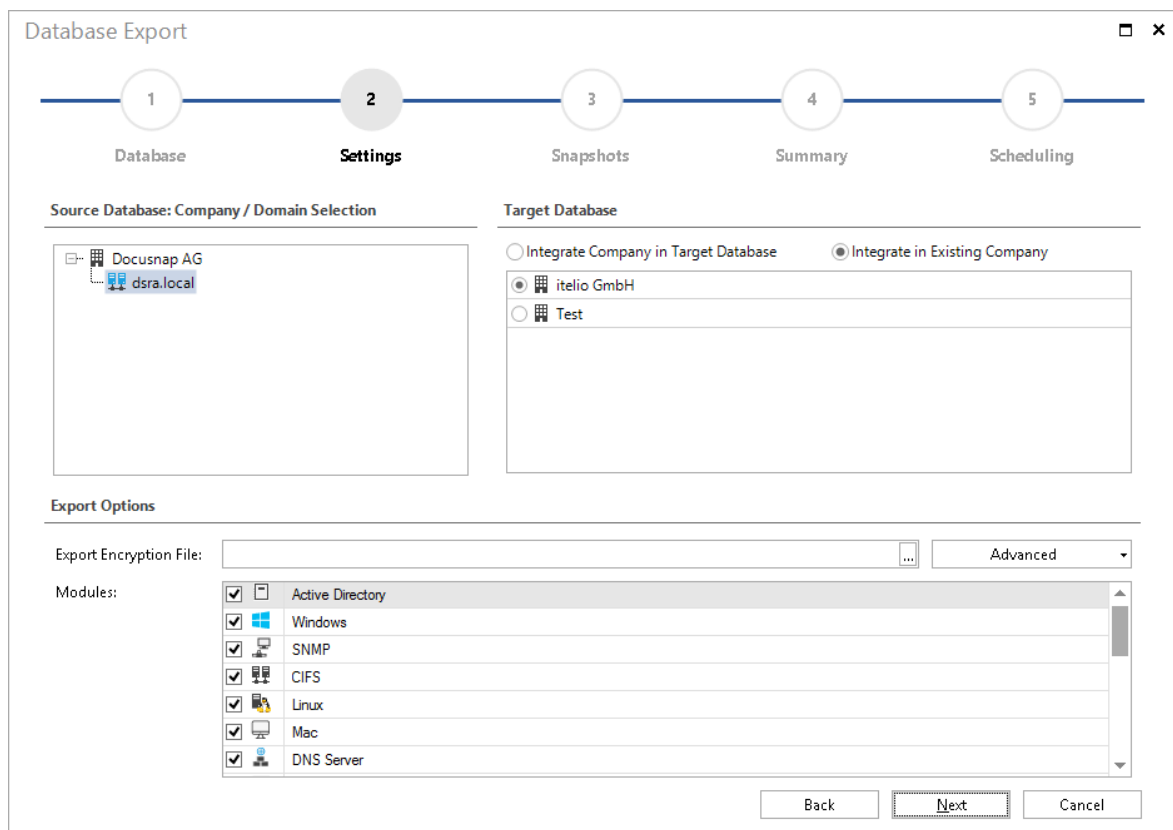
To export existing [additional information](#) associated with source database objects, enable the *Export Additional Information* checkbox in the *Advanced* group.

If you enable the *Overwrite existing Data* checkbox, the properties of static objects from the source database will overwrite those existing in the target database. Thus, for example, the street address of a company that has been selected in the source database would overwrite the street address in the target database. Please note that this feature will only affect static objects and not the snapshots.

If you wish to export the diagrams created in your database as well, enable the *Export Diagrams* checkbox.

What is more, you can export any passwords that have been created. For this purpose, an encryption file is required. Click the  icon and select the appropriate file. Its name will then be displayed in the *Export Encryption File* field.

If you want to exclude certain source database modules from the export, clear the checkmark for those which are not to be exported. If, for example, only the Windows checkbox is enabled, nothing but the workstation and server data will be exported. In addition, only snapshots containing data for the selected modules will be displayed in the next step.



The screenshot shows the 'Database Export' wizard window, specifically the 'Settings' step (Step 2 of 5). The progress bar at the top indicates the steps: 1. Database, 2. Settings (current), 3. Snapshots, 4. Summary, and 5. Scheduling.


Source Database: Company / Domain Selection

- Tree view showing 'Docusnap AG' and 'dsra.local'.

Target Database

- Radio buttons: 'Integrate Company in Target Database' (unselected) and 'Integrate in Existing Company' (selected).
- List of target companies: 'itelio GmbH' (selected) and 'Test' (unselected).

Export Options

Export Encryption File:  Advanced

Modules:

<input checked="" type="checkbox"/>	<input type="checkbox"/>	Active Directory
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Windows
<input checked="" type="checkbox"/>	<input type="checkbox"/>	SNMP
<input checked="" type="checkbox"/>	<input type="checkbox"/>	CIFS
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Linux
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Mac
<input checked="" type="checkbox"/>	<input type="checkbox"/>	DNS Server

Buttons: Back, Next, Cancel

Here, a list of snapshots from the selected source database is displayed. To find snapshots more quickly, you can either [name](#) them when doing the inventory scan, or you can assign a name to them in the [Manage Snapshots](#) dialog. To the right of the snapshot list, a [filter](#) is available for easier selection of individual snapshots.



If the number of archives has been set to 4 in the Options dialog and the source database contains, for example, seven snapshots with WMI data, the oldest three will not be imported.

Database Export

1 Database 2 Settings 3 Snapshots 4 Summary 5 Scheduling

Snapshot Selection

<input checked="" type="checkbox"/>	SCAN DATE	SNAPSHOT NAME	DESCRIPTION	DOMAIN NAME	DELETABLE	SNAPSHOT CON...	SCHEDULED
<input checked="" type="checkbox"/>	08.09.2016 09:02:57	Manual Systems			Yes		
<input checked="" type="checkbox"/>	08.09.2016 09:11:20	Inventory from 0...		dsra.local	Yes	Sharepoint	08.09.2016 11:14:18
<input checked="" type="checkbox"/>	08.09.2016 09:18:32	Inventory from 0...		dsra.local	Yes	VMWare	08.09.2016 11:19:46
<input checked="" type="checkbox"/>	08.09.2016 12:54:08	Inventory from 0...		dsra.local	Yes	IIS	08.09.2016 14:54:57
<input checked="" type="checkbox"/>	08.09.2016 13:13:56	Inventory from 0...		dsra.local	Yes	DNS	08.09.2016 15:16:33
<input checked="" type="checkbox"/>	08.09.2016 13:22:14	Inventory from 0...		dsra.local	Yes	DHCP	08.09.2016 15:23:12
<input checked="" type="checkbox"/>	08.09.2016 13:55:07	Inventory from 0...		dsra.local	Yes	SQL	08.09.2016 15:55:11
<input checked="" type="checkbox"/>	12.09.2016 13:31:45	Inventory from 1...		dsra.local	Yes	BE	12.09.2016 15:31:48
<input checked="" type="checkbox"/>	12.09.2016 13:32:50	Inventory from 1...		dsra.local	Yes	VEEAM	12.09.2016 15:32:51
<input checked="" type="checkbox"/>	12.09.2016 13:36:15	Inventory from 1...		dsra.local	Yes	EXCH	12.09.2016 15:36:24
<input checked="" type="checkbox"/>	12.09.2016 14:45:10	Inventory from 1...		dsra.local	Yes	NTFS	12.09.2016 16:45:11
<input checked="" type="checkbox"/>	15.09.2016 13:04:01	Inventory from 1...		dsra.local	Yes	WMI AD	15.09.2016 15:04:19
<input checked="" type="checkbox"/>	15.09.2016 13:08:16	Inventory from 1...		dsra.local	Yes	AD WMI DHCP D...	15.09.2016 15:08:26
<input checked="" type="checkbox"/>	15.09.2016 13:09:38	Inventory from 1...		dsra.local	Yes	AD WMI DHCP D...	15.09.2016 15:09:45
<input checked="" type="checkbox"/>	15.09.2016 14:32:14	Inventory from 1...		dsra.local	Yes	HYPERV	15.09.2016 16:32:40
<input checked="" type="checkbox"/>	15.09.2016 14:43:54	Inventory from 1...		dsra.local	Yes	Xen	15.09.2016 16:44:14
<input checked="" type="checkbox"/>	16.09.2016 06:29:07	Inventory from 1...		dsra.local	Yes	NTFS	16.09.2016 08:29:11
<input checked="" type="checkbox"/>	16.09.2016 06:30:09	Inventory from 1...		dsra.local	Yes	NTFS	16.09.2016 08:30:10

Back Next Cancel

Finally, a summary page provides an overview of the modules and snapshots to be imported. If you want to change any of the data import settings, click the *Back* button. To start the import, click the *Start* button.



Database Export

1

2

3

4

5

Database
Settings
Snapshots
Summary
Scheduling

Summary

☐ Modules selected for export

Windows

CIFS

Mac

Linux

SNMP

Active Directory

DNS Server

DHCP Server

VMware Infrastructure

SQL Server

Exchange Server

NTFS Permissions

☐ Export Options

Export Extensions (Finance Data, Comments, Passwords, Contracts, Reminders)

☐ Snapshots selected for export

Manual Systems

Inventory from 02.12.2016 11:41:52

Inventory from 02.12.2016 13:39:20

Inventory from 02.12.2016 14:06:01

Inventory from 05.12.2016 08:57:38

Inventory from 05.12.2016 09:19:45

Inventory from 05.12.2016 10:22:55

Inventory from 05.12.2016 11:09:42

Back
Next
Cancel

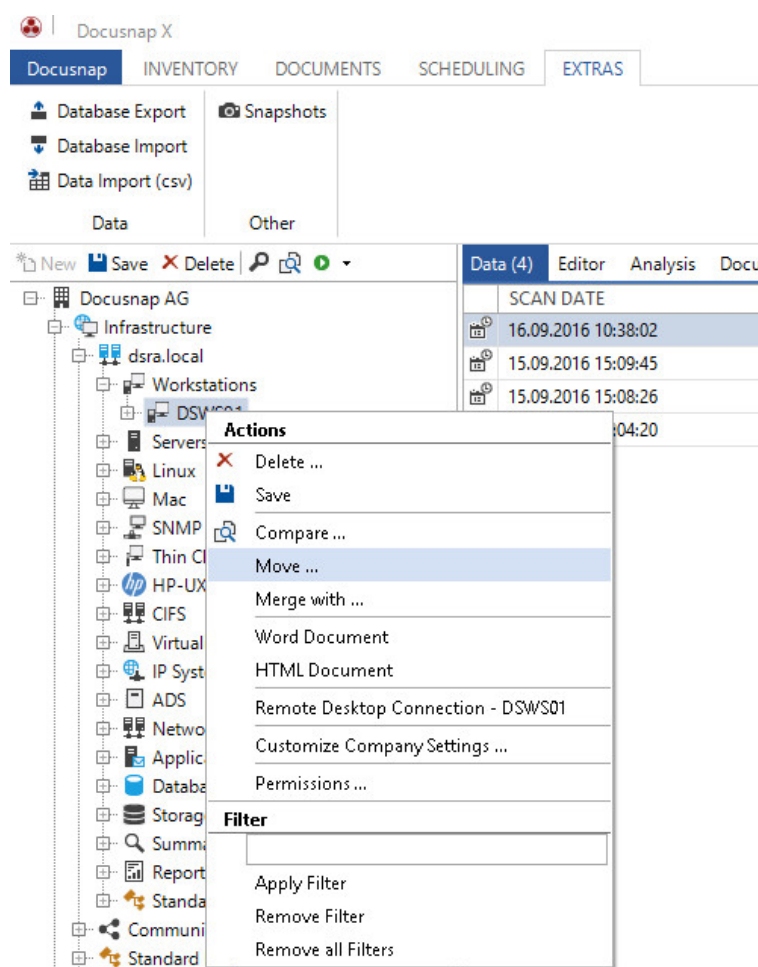
Through Scheduling, you can specify that the Data Export routine will start automatically at a later point in time. In the *Scheduling* step, you can define whether the export will be a one-time or a recurring event. Please note, however, that this feature can only be used if the Docusnap Server is installed on a system in the network. If the data export is scheduled, the schedule is saved by clicking on the *Finish* button and the wizard closes. If the checkbox *Schedule Database Export* was not activated, click the *Start* button to start the export process.

During the database export, its status will be displayed. To abort the export process, click the *Cancel* button. The data that has been exported up to that moment will be retained in the target database. Finally, the Report page will be displayed.


20.7 Move Systems


In Docusnap, you can move an inventoried system from one domain to another domain in the same or in a different company. Thereby the inventory data associated with a system that was moved to another domain, can also be moved in Docusnap. When you move a system, all related data is moved with it. The data of the system you moved will also be displayed in the License Management and Permission Analysis for the domain the system has been moved to. You can move inventoried Windows, Linux, Mac and SNMP systems.


To move a system, right-click it in the *Inventory* tree view and select *Move* from the context menu.



In the *Move* dialog, select the company and domain where you want to move the selected system. The system will be moved by when you click the *Move* button.

 Move □ ×

System to be moved:  DSW501

	DOMAIN NAME	COMPANY NAME	
	docusnap.intern	Docusnap AG	

Move Cancel



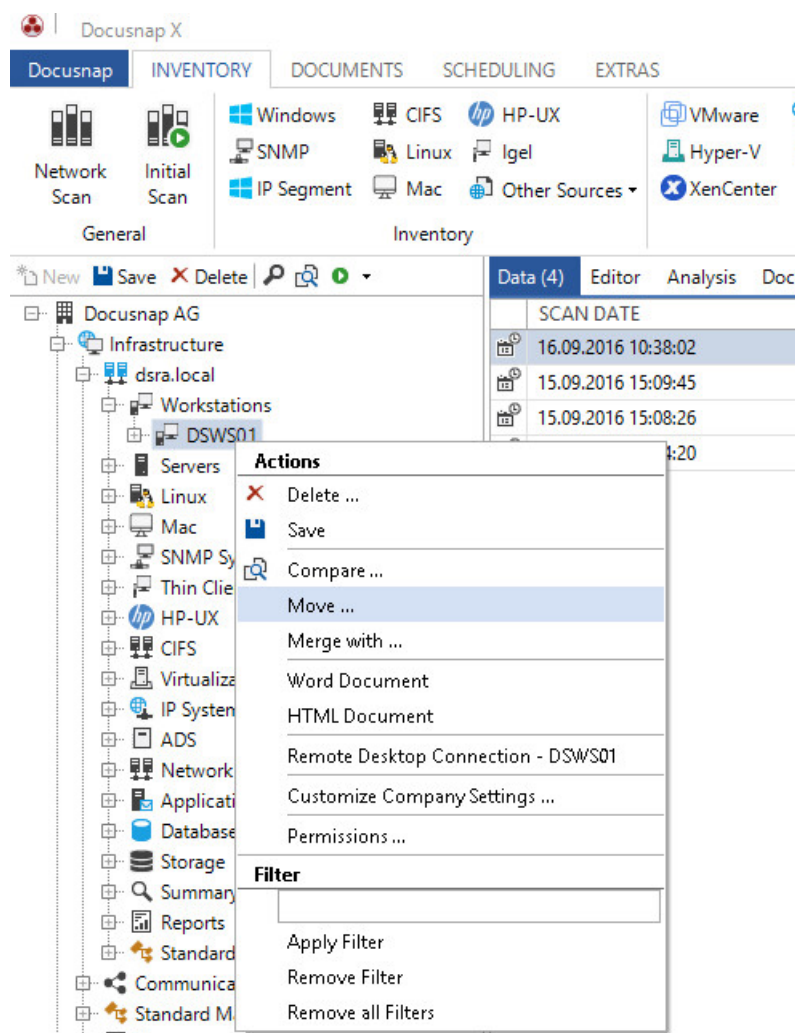
By moving a system, it can no longer be linked with the [diagram](#). Therefore, it will be marked as (deleted). In this case, the system would have to be deleted from the diagram and then added to the diagram again from the new position in the tree.

If the data of a moved system has been added to a [concept](#), then this data is no longer in the concept after the update. In this case, the data of the system would have to be added back to the concept from the new position in the tree.


20.8 Merge Systems


In Docusnap, you can merge the inventory scans of different systems into one system. If the number of scans for the two systems to be merged exceeds the number of allowed archive versions, the oldest inventory scans will be deleted. A system can only be merged with another system in the same domain.

Right-click one of the systems to be merged and select *Merge with* from the context menu.










In the *Merge with* dialog, select the target system, i.e. the system into which the selected system should be merged. Click the *Merge* button to merge the two systems.

 Merge with □ ×

System to be merged:  DSW501

The data of the system "DSW501" will be merged with the system "DSBK01". Afterwards the system "DSW501" does no longer exist as an individual entry in the database.

	MERGE WITH OBJECT	
	DSBK01	
	DSDC01	
	DSEX01	
	DSFS01	
	DSFS02	
	DSSP01	
	DSSP02	

Merge Cancel



By merging systems, it can no longer be linked in the [diagram](#). Therefore, it will be marked as (deleted).

If the data of a merged system has been added to a [concept](#), this data is no longer in the concept after the updating the concept.

Part



21 Advanced Topics

[Management Tools](#)

Using the Management Tools feature, you can embed external programs into Docusnap or start them from there.

[Report Differences](#)

List of custom user reports in the report repository.

[Notifications](#)

Using the Notifications feature, Docusnap enables you to automatically send e-mail messages to users. These notifications are based on database queries. This way, it is possible to send warnings, for example, in case a contract is expiring.

[Report Automation](#)

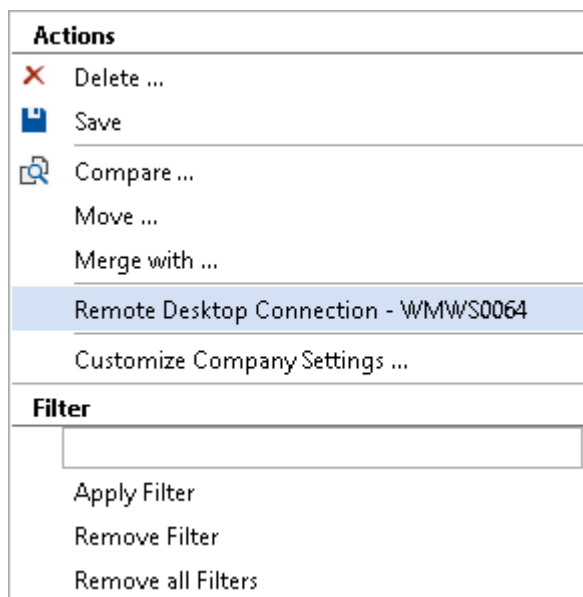
Using the automated reporting feature in Docusnap, you can schedule the automatic creation of reports.


21.1 Management Tools

Using the Management Tools feature, you can embed external programs into Docusnap or start them from there. It is possible to specify additional parameters to be used when starting the program.

During the Docusnap installation process, the Remote Desktop Connection has already been created. When you create the management tools you can define for which host types they should be available.

The management tools are available from the context menu of items located in the tree at levels below the Workstations or Servers nodes.



The management tools can be started either from the context menu or using the  button.



To define the *Management Tools* open the Docusnap Management.

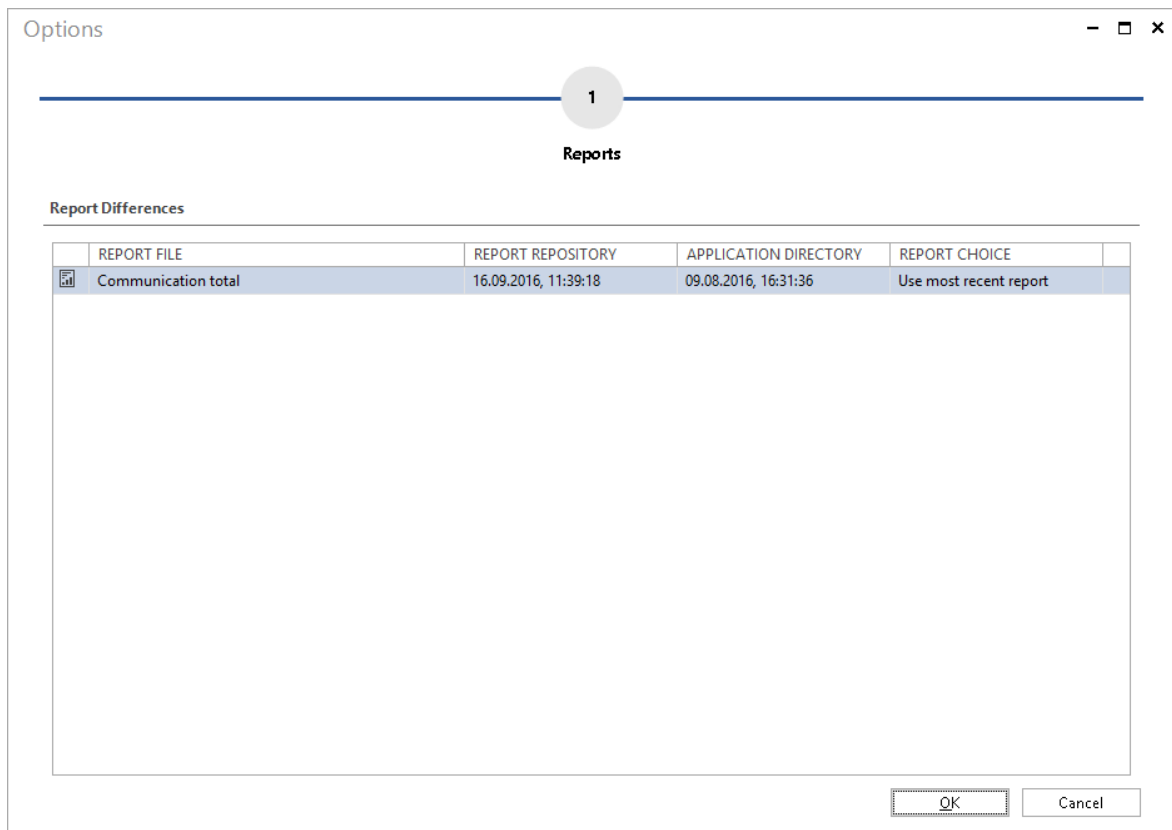
21.2 Report Differences

The reports supplied by Docusnap are stored in the program directory. When you start Docusnap for the first time, you will be prompted to specify the system paths for *Local Settings* and *Team Settings*. These paths can be changed later in the [Options](#) dialog. If a Team Settings path has been specified, it takes precedence, otherwise, the local path will be used.

User-adapted or newly created reports are subsequently stored in the report repository.

The *Report Differences* dialog will compare the report versions from the program directory and the report repository. Here all reports are listed for which there is a system version and a customer version. In addition it is specified which version is used. For each report can be defined, if always the latest report, the customer report or the system report should be used. Changes can be made in the *Manage Reports* tab of the *Docusnap Management*.

If new or updated reports have been downloaded during an update, they will be saved to the program directory.



21.3 Notifications

With this feature, you can have Docusnap automatically send an E-Mail when a license becomes invalid or an agreement expires on that day. To use the Notifications feature, the Docusnap Server component must be configured.

To define and transmit notifications, the *Define Notifications* dialog and the *Notification* wizard are required.

Define Notifications

Use the *Define Notifications* dialog to define the query statements for your notification. These statements determine which information will be sent in each e-mail and which criteria will trigger the transmission of a notification e-mail.

Notifications

Use the Notifications wizard to configure the intervals for checking the criteria.

21.3.1 Define Notifications

Click the *Define Notification* button in the *Scheduling* ribbon to open the *Define Notification* dialog.

In the Define Notification dialog, you can set the name and the statement for the notification. An e-mail will only be sent if the SQL statement returns a result set. If the query returns the same result as the previous query, nothing will be sent.

Some predefined notification types provided with the Docusnap installation.

You can choose the notification title as desired. If you work with the English user interface, the text you enter in the *English Text* field will be displayed when you select the notification from the wizard. If Docusnap has been set to German, the content from the *German Text* field will be used. You can optionally specify a description for each notification you define.

If the selected SQL statement returns at least one result row, an e-mail will be sent. The results will be submitted in an Excel file attached to the e-mail. All columns used in the SQL statement will be reflected in the Excel file. The SQL statement may use all tables available from the selected database.

You can use the company {ACCOUNT}, the domain {DOMAIN} and the current date {NOW} as variables in the SQL statement.

If you disable the *Active* checkbox, this definition will not be available for selection from the notification wizard.

TITLE	STATEMENT
InvalidLicenses	Select LicName,ValidTo,ServiceValidTo,AccountName from...
OutdatedContracts	Select AccountName,CnTitle,CnDateEnd,CnDetail from tEx...
Reminder	Select AccountName,ReTitle,ReDetail,ReDate from tExRemi...

Title: ☒ Active

Statement:

Now: {NOW} Domain: {DOMAIN} Company: {ACCOUNT}

German Text: English Text:

Description:

21.3.2 Notifications

Click the *Notification* button in the *Scheduling* ribbon to open the *Notification* wizard.

This wizard allows you to set the interval for criteria checks and to specify the intended e-mail recipients.

The first step is to select the company. By selecting the company, you determine which company will be used for the SQL Statement.

The screenshot shows a window titled "Notification" with a progress bar at the top containing three steps: 1 (Company Selection), 2 (Notification), and 3 (Scheduling). Step 1 is currently active. Below the progress bar, the text "Please select a company:" is followed by a dropdown menu labeled "Company:" with "DocuSnap AG" selected. At the bottom, a yellow status bar displays a green checkmark and the message "Company Selection: A company is selected." To the right of the status bar are "Next" and "Cancel" buttons.

Here, you define the notification to be sent. The *Template* drop-down list offers some predefined notification types for selection. In the *SQL Query* field, you can see which SQL statement will be used for the selected notification type. If the {Domain} variable is part of the statement, you must select a filter. A domain must be selected for the {Domain} variable. Only domains for the in the first step selected company will be displayed as filters.

Specify the e-mail address of the intended recipient in the *Recipient* field and the subject of the notification in the *Subject* field.

Then, enter the body text of the notification in the *Message* field.

The results from the SQL statement will be attached to the e-mail as an Excel file. If the execution of the statement does not return a result set, no e-mail will be sent. This could be the case, for example, if the program checks for invalid licenses and none of the license expiration dates is earlier than or matches the current date.

Notification

1

2

3

Company Selection

Notification

Scheduling

Select Template

Template: Outdated contracts

SQL Query
Select AccountName,CnTitle,CnDateEnd,CnDetail from tExContract,tExtensions,tAccounts WHERE
tExContract.ContractID=tExtensions.ExtensionID AND tExtensions.AccountID = tAccounts.AccountID AND CnDateEnd <= {now}

Filter: dsra.local

Notification

Recipient: docusnap@docusnap.com

Subject: Outdated contracts

Message:

Back

Next

Cancel

In the next step, you can define scheduling details. Scheduling allows you to define the date(s) and time(s) for execution of the SQL statement.

Scheduling is only available if the Docusnap Server service has been set up properly and the connection between the server service and an SMTP server has been tested successfully.

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Changing Date: 1/21/2020

Notification

1 Company Selection 2 Notification 3 Scheduling

☒ Schedule Notifications

Name: Outdated contracts

Schedule Type: Recurring

Every week on Sunday at 22:00:00. Schedule will be used from 16.09.2016.

Frequency

Interval: Weekly

Recurring every: 1 week(s) on: ☐ Monday ☐ Tuesday ☐ Wednesday ☐ Thursday ☐ Friday ☐ Saturday ☒ Sunday

Frequency per day

☒ Once at: 22:00:00

☐ Every: 1 Hour(s) Start: 00:00:00 Ende: 23:59:59

Duration

Start Date: 16/09/2016 ☒ No End Date ☐ End Date: 16/09/2016

Back Finish Cancel

21.4 Report Scheduling

With Docusnap, you can schedule the creation of reports and have them generated automatically at a later point in time.

The scheduled report will be created in the selected format and saved in the Docusnap Server documentation path. The following folder structure will be created in the target directory:

- Company\Reports
- Company\Domain\Reports

Standard reports that are created via the server Docusnap are loaded from the program directory and do not have to be treated specially. To generate user-customized or newly created reports with the Docusnap Server, they must be provided in either the Team Settings path of the Local Settings path of the Docusnap Servers.

To start the report scheduling wizard, generate the corresponding report. Then, click the *Schedule as Job* button on the *Reporting* ribbon to start the wizard.

For Permission Analysis reports (*Users (Resources)*, *Directory (Resources)*) the wizard will be started by clicking the *Schedule* button in the corresponding dialog.

The settings you specify for your report will be saved and applied when the report is executed later.

In the first step, you can select the language of your report. All reports are available in English and German. These reports have the same file names and are distinguished only by their prefix, "EN_" or "DE_". If you change the language while creating the job, the report will be created in the newly selected language. So when creating user-defined reports, make sure to provide them in both languages.

In case you do not create the report using the predefined directory (documentation path), specify an alternative documentation path. By default, the documentation path defined for the Docusnap Server will be used. If you specify an *alternative documentation path*, that path will be used.

The screenshot shows the 'Report Scheduling' dialog box with three steps: 1. Company Selection, 2. Report, and 3. Scheduling. Step 1 is active. It contains a 'Select Company' dropdown menu with 'Docusnap AG' selected. Below it is a 'Documentation Path' section with an unchecked checkbox for 'Alternative Documentation Path' and a text field containing 'C:\Docusnap\Documentation'. The 'Options' section has a 'Language' dropdown set to 'English' and an unchecked checkbox for 'Just HTML Documentation'. At the bottom, a yellow status bar shows a green checkmark and the message 'Company Selection: A company is selected.' There are 'Next' and 'Cancel' buttons at the bottom right.

In the next step, you can select the desired report format.

The following formats are available: docx, xlsx, html, odt and pdf.

Additionally, you can specify here whether to include a cover page, a header and a footer in your report. If you do not make any changes, the settings from the *Layout (CI)* dialog will be used.

If you tick the *E-Mail Distribution* checkbox, the report will be sent to the e-mail address(es) specified below. Even if *E-Mail Distribution* is enabled, the reports will always be saved to the *documentation path* specified.

Report Scheduling

1

2

3

Company Selection

Report

Scheduling

Distribution Options:

☒ Header
 ☒ Footer
 ☒ Show Cover

Paper Size:

Letter

Distribution

☒ E-Mail Distribution

Recipient:

docusnap@docusnap.com

Subject:

scheduled report

Message:

Advanced

☐ Create DOCX
 ☐ Create HTML
 ☒ Create PDF
 ☒ Create XLSX
 ☐ Create ODT
 ☐ Print Preparation (MDC)

Back

Next

Cancel

In the next step, you can define scheduling details. This step determines when and how often the report will be created.



Scheduling will only work if the Docusnap Server service has been set up.

Report Scheduling

1 Company Selection 2 Report 3 Scheduling

☒ Schedule Report

Name: Every week on Tuesday at 10:00:00. Schedule will be used from 16.09.2016.

Schedule Type:

Frequency

Interval:

Recurring every: week(s) on: ☐ Monday ☒ Tuesday ☐ Wednesday ☐ Thursday ☐ Friday ☐ Saturday ☐ Sunday

Frequency per day

☒ Once at:

☐ Every: Start: End:

Duration

Start Date: ☒ No End Date ☐ End Date:

21.5 Options Configuration File

Settings you define in the *Options* dialog will be stored in a configuration file located on the computer where Docusnap is running. If multiple employees want to use the same settings when working in Docusnap, it is possible to start the program using a shared configuration file.

You can either directly append the corresponding parameter to the Docusnap.exe file or define it when starting Docusnap from the command line. The parameters are case-sensitive, i.e. they must be entered exactly as shown here: *-SelectConfig* and *-UseConfig*.



When Docusnap is update the Docusnap icon on the desktop is deleted and created again. Thereby the parameters *-SelectConfig* and *-UseConfig* are deleted.

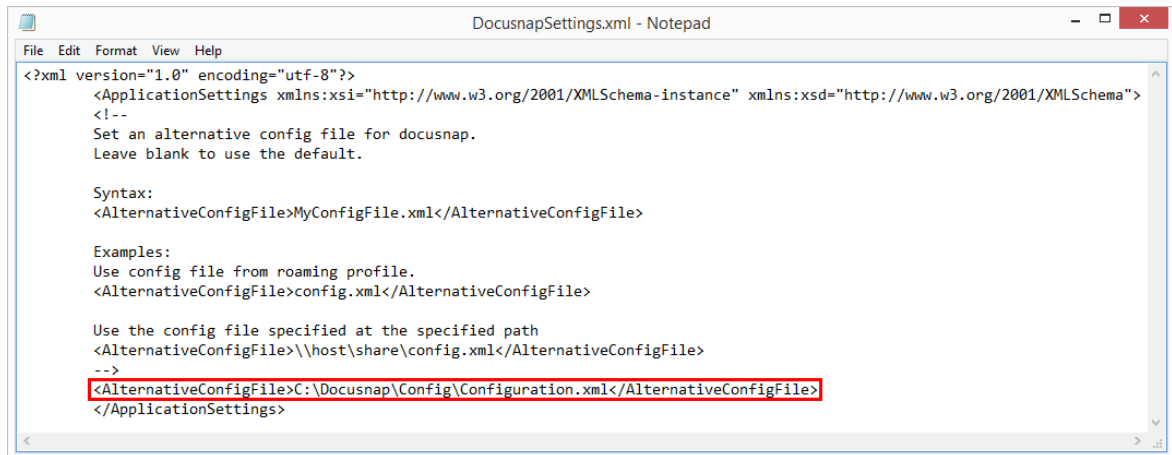
The path can be set permanently in the file DocusnapSettings.xml, so the path does not have to be specified again after every Docusnap Update.

Configuration File

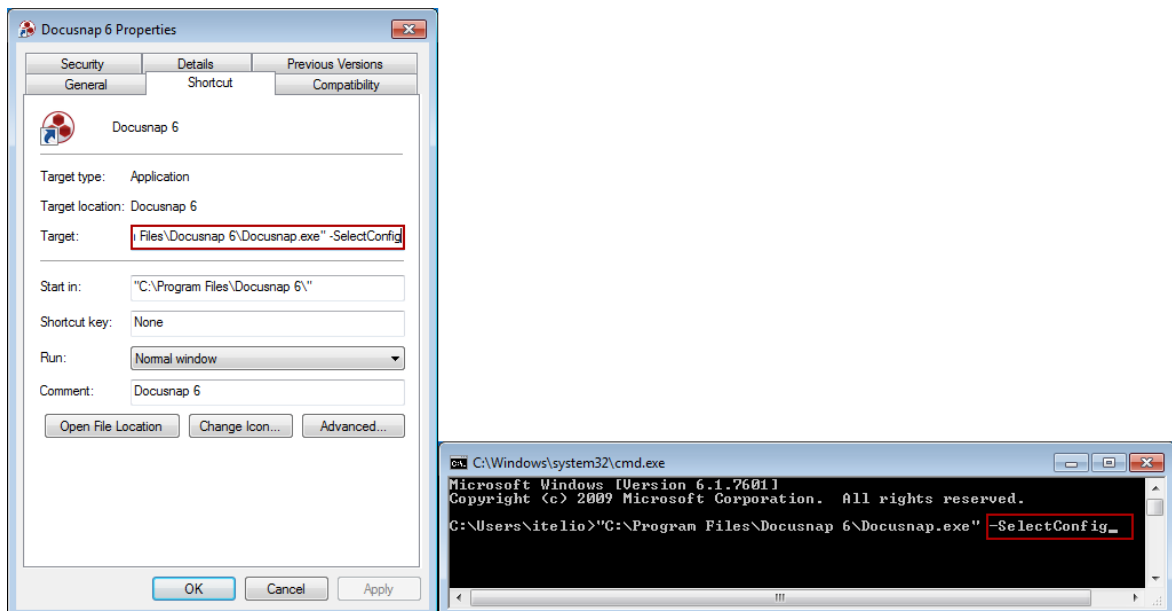
When installing Docusnap the file DocusnapSettings.xml is created in the directory "C:\ProgramData\Docusnap". In this file the tag `<AlternativeConfigFile>` specifies the path where the desired configuration file is saved. When updating Docusnap



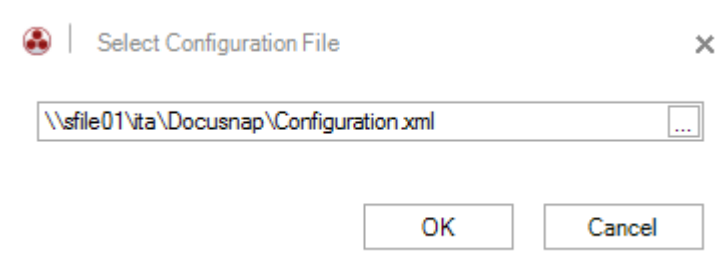
this file is not changed, as a result Docusnap always uses the defined configuration file. If no path is specified in this file the default configuration file is used.



-SelectConfig



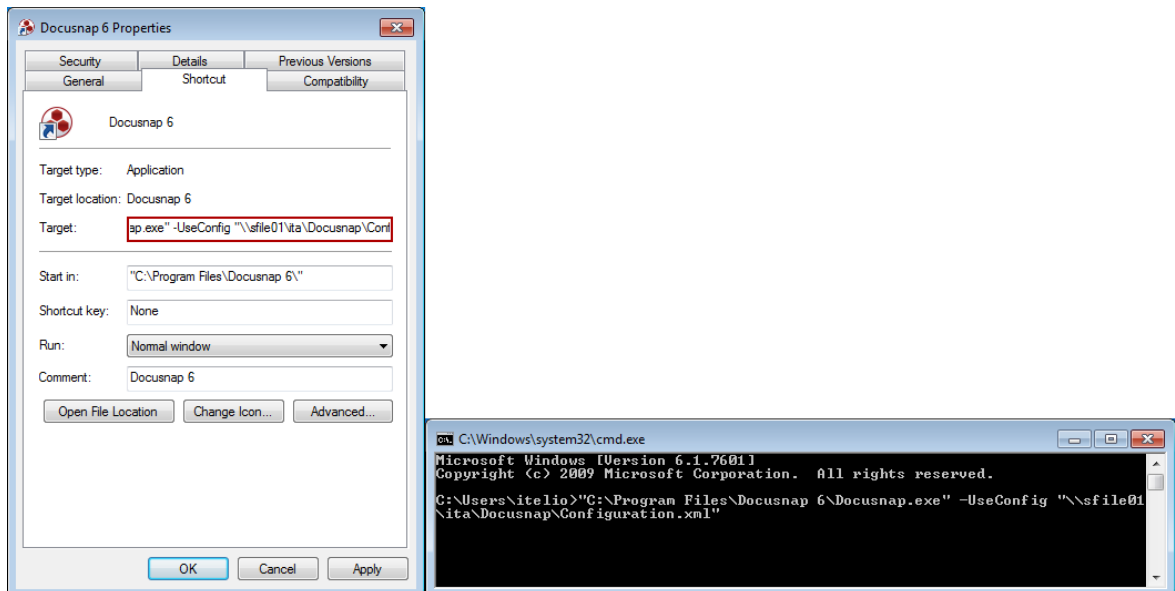
When you use the `-SelectConfig` parameter, a dialog appears before the Docusnap startup which allows you to select the path to the configuration file. Then, Docusnap will be started using the settings from the selected configuration file.



If in addition a path to a folder is specified, this folder is opened by default when selecting the configuration file. `-SelectConfig "C:\ProgramData\Docusnap"`

-UseConfig

The *-UseConfig* parameter allows you to specify a particular configuration file to be used each time Docusnap is started. When using this parameter, you specify the path to the configuration file.

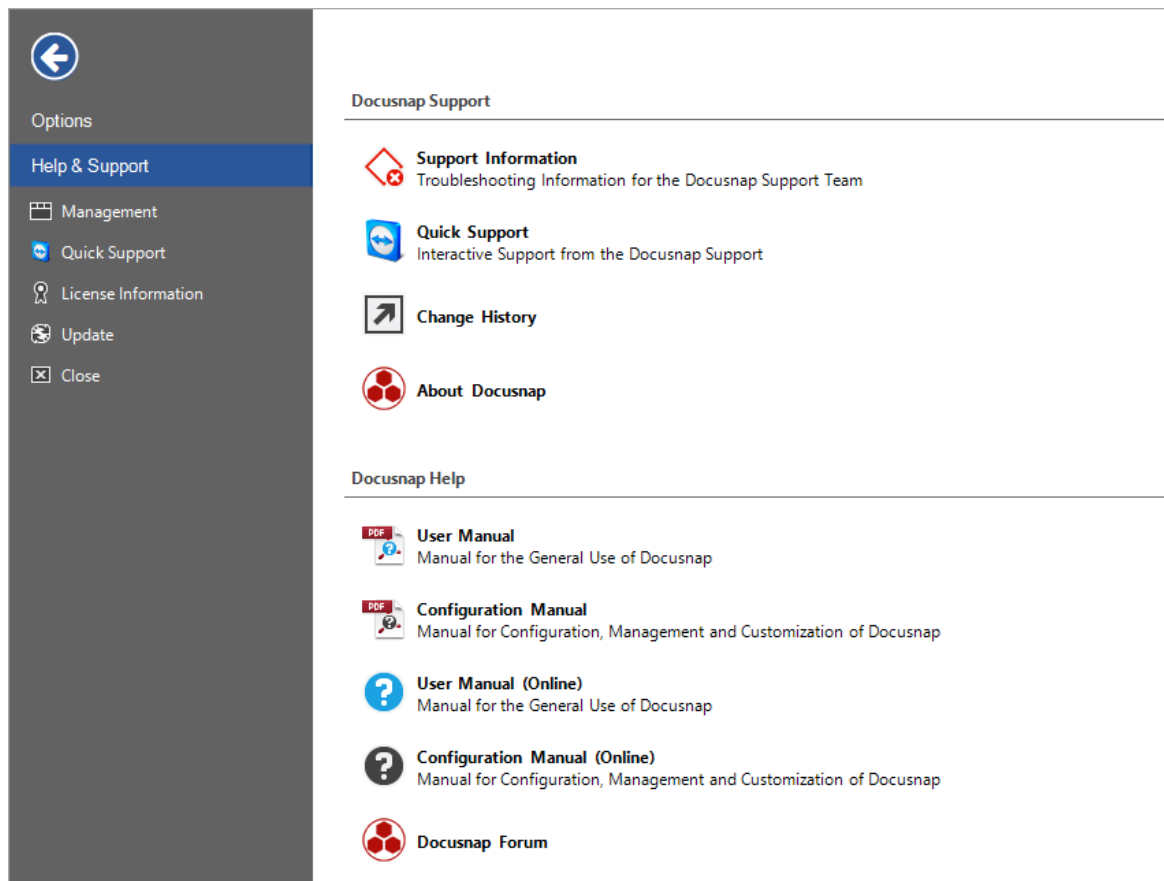


Part



22 Support & Help

The [Docusnap Menu](#) in Help & Support includes all features provided by the Docusnap Support Team to assist you with problems or questions.



[Update](#)

To download an updated Docusnap version via an Internet connection, simply click the *Update* button.

[Support](#)

This group provides features for generating log files and displaying general information about Docusnap. A Live Support feature is also available.

[Manual / Online Help](#)

This group provides access the manuals and help systems both for the use of Docusnap and the administration.

In addition, more how-to documents on the Docusnap website can be used for help. <http://www.docusnap.com/en/support/how-to>









Docusnap How To

Hands-On Tips and Instructions for the Use of Docusnap



The How To documents available for download on this page provide answers to frequently asked questions. The PDFs contain hands-on tips and instructions that enable you to solve common basic problems on your own.

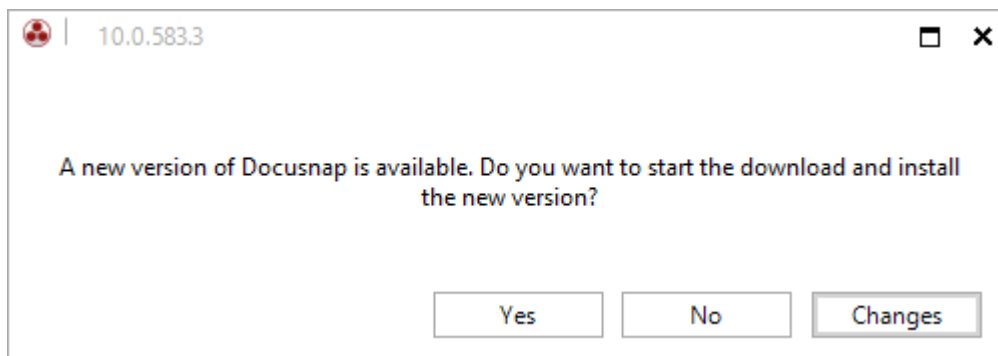
You can of course contact our Support Team via e-mail under support@docusnap.com at any time if you have other, specific questions on the Docusnap features.

How To	Contents	File
Document	Docusnap 6.3 Activation	
Document	WMI Access Problems	
Document	Windows Firewall Exceptions	
Document	DocusnapScript.exe (Script-Based Inventory Process)	
Document	Docusnap 6.3 - Getting Started	
Document	Data Export and Import	
Document	Defining Notifications (E-mail Reminders)	
Document	Creation and Add-on of IT-Assets	

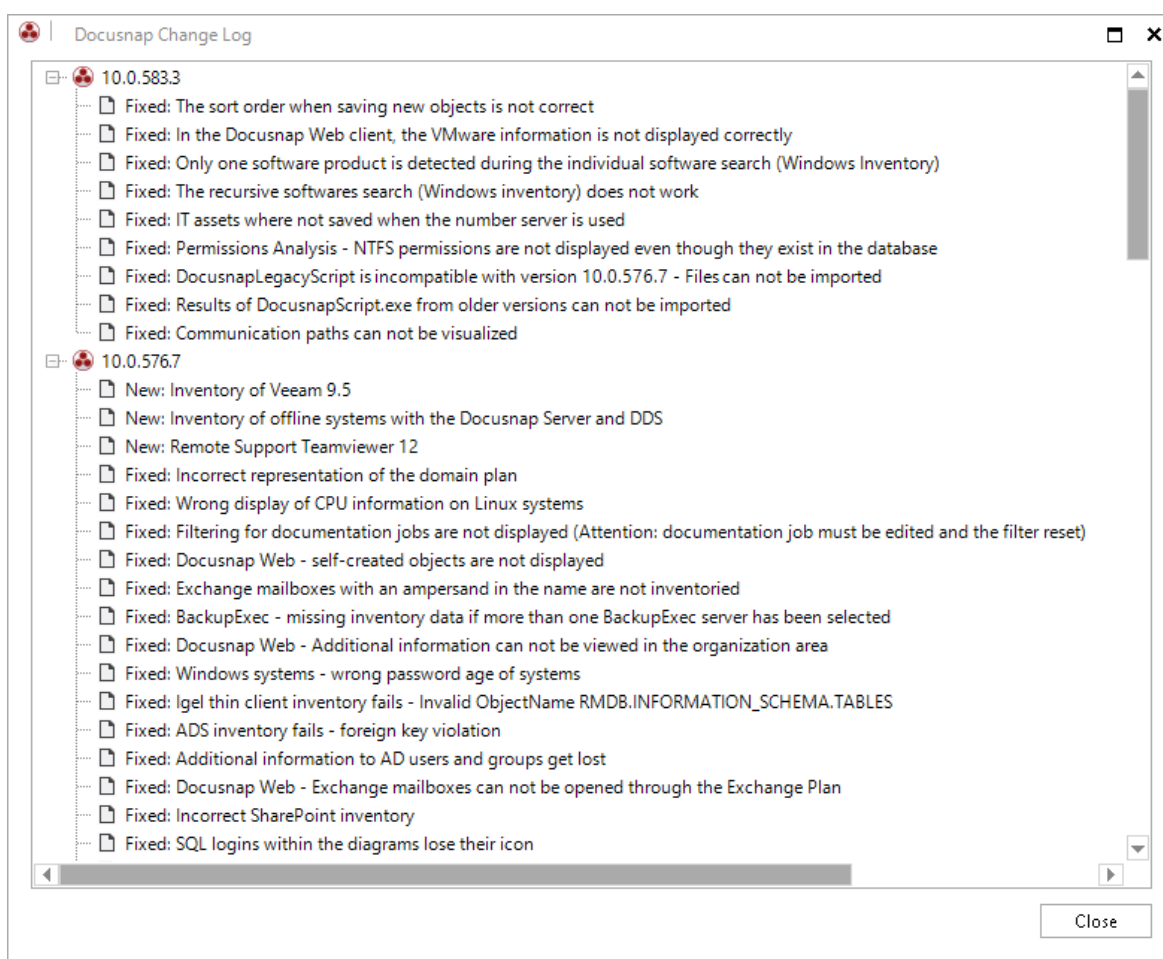


22.1 Update

The *Docusnap Update* allows you to obtain updated versions and keep your Docusnap installation up to date. If a new Docusnap version is available, you will be prompted for an update upon startup, but you can also click the *Update* button to open the update dialog.



To see a list of the new features and/or bugfixes, click the *Change History* button.



When you confirm to start the update process, Docusnap downloads the update set. The installation automatically starts once the download has completed successfully. Upon completion of the installation, you can start the new Docusnap version.



If Docusnap has been installed on multiple workstations, the update must be performed for all of the installations.

22.2 Problem Resolution

Enabling Debug Mode

If errors occur while using Docusnap, you can trace them. Check the *Enable Debug Mode* option in the [Options dialog](#) to log errors in the database. You have the option to either log all program events or exceptions only.

By clicking the *Support Information* button, you can open a dialog where you can save the logged data to a file and send it to the Docusnap Support team.

To delete all existing debug information from the database, click the *Reset Log* button on the General page of the Options dialog.

The screenshot shows the 'Options' dialog box with the 'GENERAL' tab selected. The dialog has a title bar with a red icon and standard window controls. The tabs are GENERAL, SYSTEM PATHS, LICENSING, DATABASE, and CONNECTIONS. The 'General Settings' section includes checkboxes for 'Show Network Maps' and 'Password Logging', both checked, and a 'Language' dropdown set to 'English'. The 'Debugging' section includes a checked 'Enable Debug Mode' checkbox, a 'Debug Level' dropdown set to 'Log everything', a 'Target Storage Location' dropdown set to 'Database', and a 'Reset Log' button. There is also an unchecked 'Create Additional Debug Files' checkbox. The 'Docusnap User Permissions' section has a 'Dedicated Domain Controller' text field. The 'Other Settings' section includes a checked checkbox for 'Show date of creation and last modification for additional information' and a 'Font Size' dropdown set to 'Standard', with a warning icon and text: 'Changing the font size can lead to an incorrect display'. At the bottom right are 'OK' and 'Cancel' buttons.



Enabling the Debug Mode for Docusnap Server

The Docusnap Server is required to schedule network scans, documentation creation processes, notifications, etc. to be performed automatically at a later time. To be able to analyze errors, the debug mode for the Docusnap Server component must be enabled.

You can do so in the *Configuration* wizard for the Docusnap Server. To set the desired level of debugging, you can select either *Log everything* or *Exceptions only* from the Debug Level dropdown list. The storage location is set to *Database*. Clicking the *Reset Log* button will delete all existing error information from the database.

The screenshot shows the 'Server Configuration' wizard window, specifically Step 1: 'Server Start Settings'. The wizard has five steps in total, represented by numbered circles at the top: 1 (Server Start Settings), 2 (Server Database), 3 (Server Mail Settings), 4 (Server API), and 5 (Server Settings). Step 1 is currently active and highlighted with a red line.

Below the step indicators, there is a section titled 'Configure Docusnap Server:' with a checked checkbox. This section contains the following fields:

- Startup Type:** A dropdown menu set to 'Automatic'.
- Language:** A dropdown menu set to 'English'.
- User:** An empty text input field.
- Password:** An empty text input field.
- ☐ Execute Inventory in Own Process

Below these fields is a **Remark:** 'If no user and password is entered, Docusnap Server uses the local system account. If the system account doesn't have permissions for the database, Docusnap Server exits with an error. For the network paths (team settings, documentation path ...) the necessary permissions for the account **MachineName\$** must be granted.'

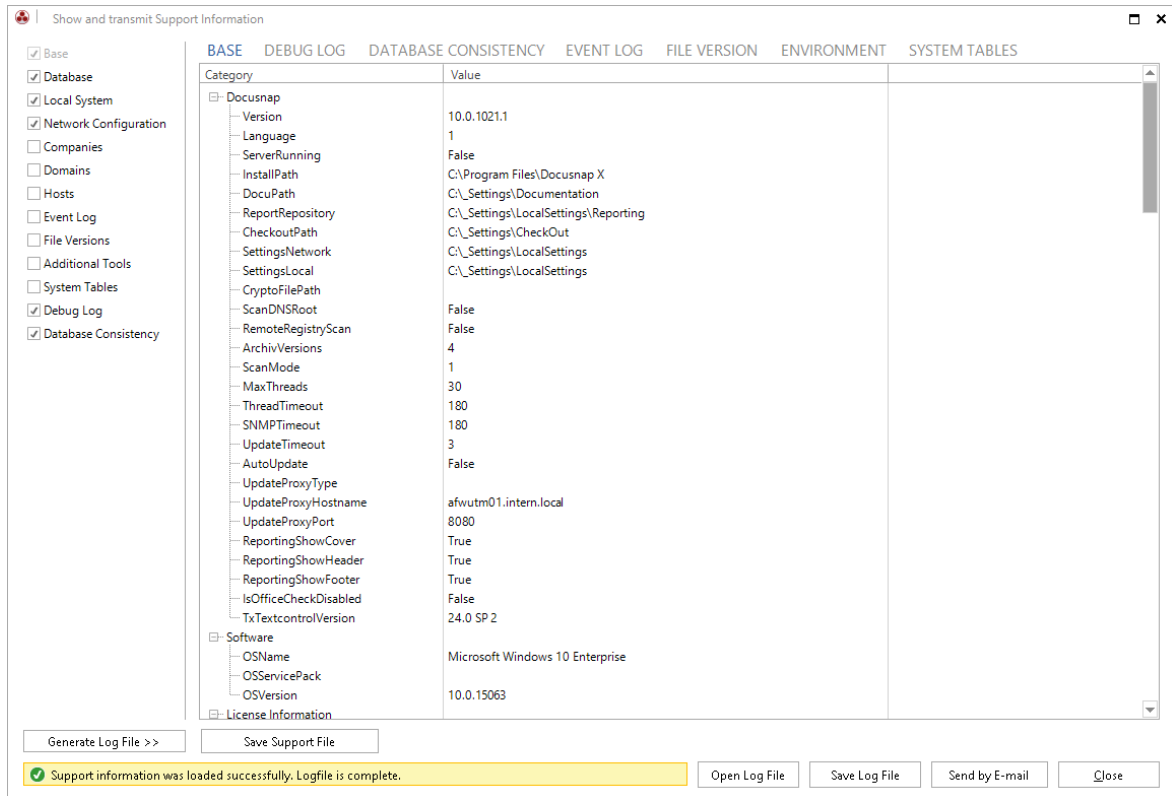
Below the remark is a section titled 'Debugging' with a checked checkbox 'Enable Debug Mode'. This section contains:

- Debug Level:** A dropdown menu set to 'Log everything'.
- Reset Log:** A button.

At the bottom right of the window are two buttons: 'Next' and 'Cancel'.

Communicating Support Information to the Support Team

The *Support Information* dialog, allows you to generate log files and send them to the Docusnap Support team.



- **Generate Log File:** Generates a log file according to the selected options.
- **Open Log File:** Displays the generated log file content.
- **Send with Outlook:** Opens the standard e-mail client and creates a new e-mail. MAPI support is required. The recipient defaults to the Docusnap Support Team and the log file is attached automatically. Alternatively you can also save the log file first, manually create an e-mail addressed to the Docusnap Support team and attach the log file.



