



DocuSnap X – Additional Information

Adding Additional Information to DocuSnap

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1. Additional information in Docusnap X – A brief overview

To fully leverage Docusnap as the key application for IT documentation, it must be possible to easily extend database objects by adding any desired information to them. Not only organizational objects, such as the company (tenant) or the location, but also inventoried systems or existing license definitions can be enhanced with additional information.

Such additional information (e.g. server maintenance contract) can be assigned to a single server or to any desired number of servers (n:m relation).

The following types of additional information can be added in Docusnap:

- Comments
- Financial Records
- Contracts
- Passwords
- Tasks

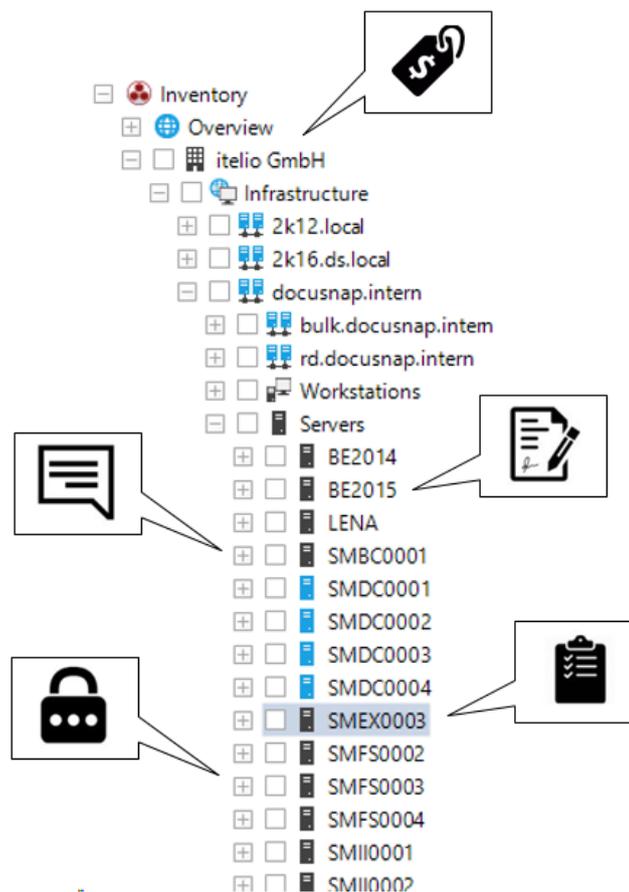


Fig. 1 – Additional information – Overview of features

2. Description of features – Common additional information items

2.1 Features applying to all types of additional information

2.1.1 Adding additional information – Method 1

In the new, redesigned Docusnap X user interface, additional information is listed in two different places. At startup, Docusnap X displays a new panel for additional information at the right-hand side of the user interface. You can hide this panel, if desired.

Click *New Element* and select the desired option to create additional information of the desired object type. Existing additional information can be deleted or edited.

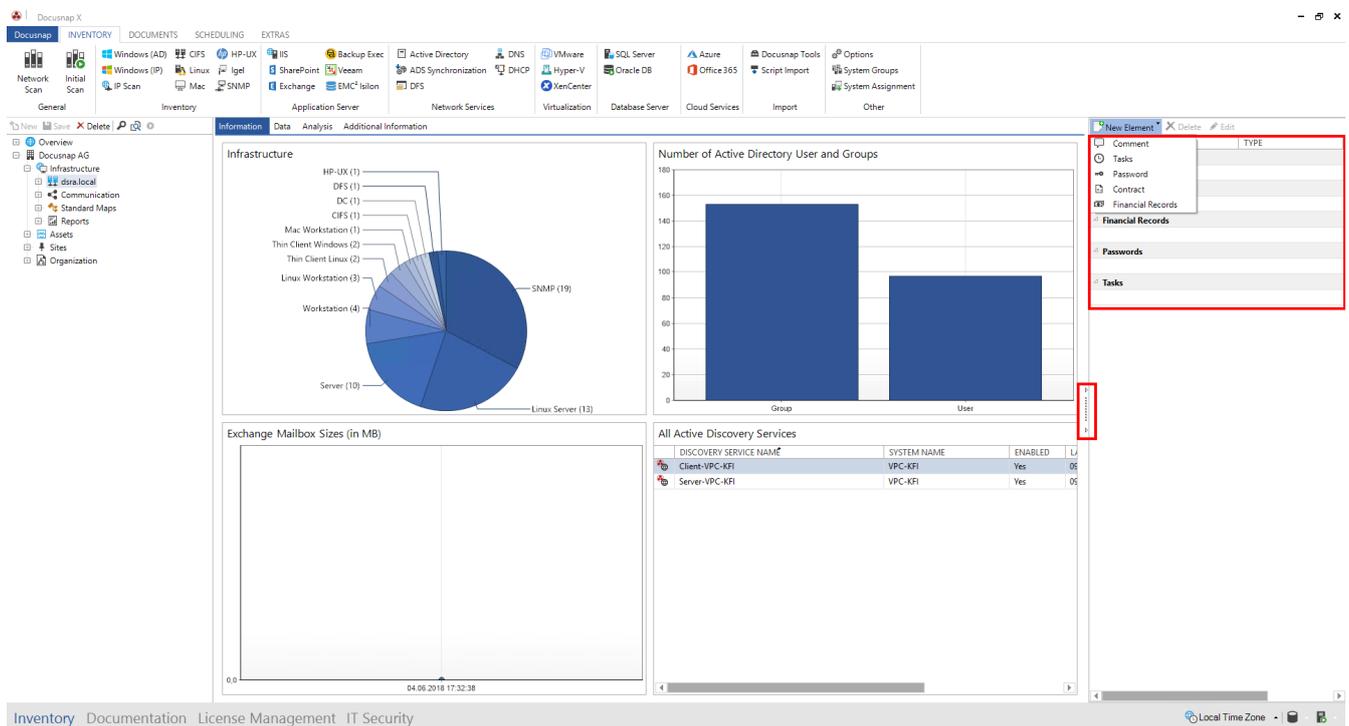


Fig. 2 – All additional information types – Adding additional information – Method 1

2.1.2 Adding additional information – Method 2

There is a second method for entering, deleting, or editing additional information which is described below.

First, select the object for which you want to create additional information from the hierarchy and then click the *Additional Information* tab. The *Organization* tab appears on the ribbon. On this tab, select the option for creating the desired type of additional information.

In the *General* group, you can edit, delete, and assign existing additional information, grant permissions to it and save additional information that is currently being edited.

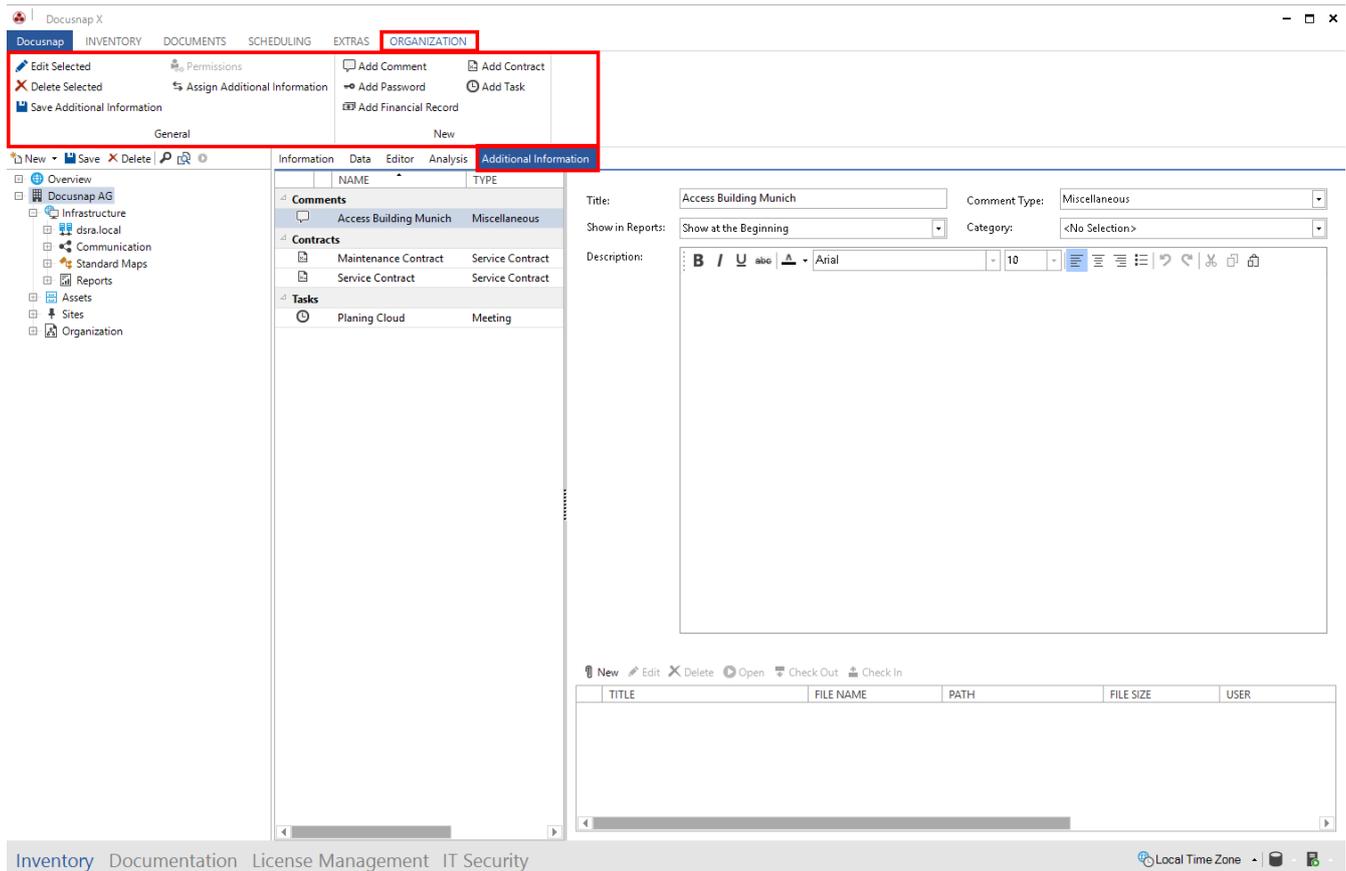


Fig. 3 – All additional information types – Adding additional information – Method 2

2.1.3 Additional information – User interface

Activities such as creating, naming, granting permissions, and assigning additional information are identical for all types. The common fields are explained in the following sample procedure (Comment type):

- For the **Title**, enter *MS SQL Server Installation Procedure* (required field).
- (Optional step:) In the User Management, you can optionally assign Docusnap users to categories. If a **Category** (here: Administration) has been set for a particular additional information item, only users assigned to that category may access this information.
- The **Description** field allows you to enter a formatted description text with UNC and URL links. You can drag & drop text files into this field.
- You can then assign this additional information item to any object in the **Hierarchy** (n:m relation).
- After saving the additional information, any **attachments** can be assigned to the additional information item (please refer to section 2.1.4 – Attachments – Description of Features).
- To save and / or close the dialog, click the corresponding button at the lower right of the dialog.

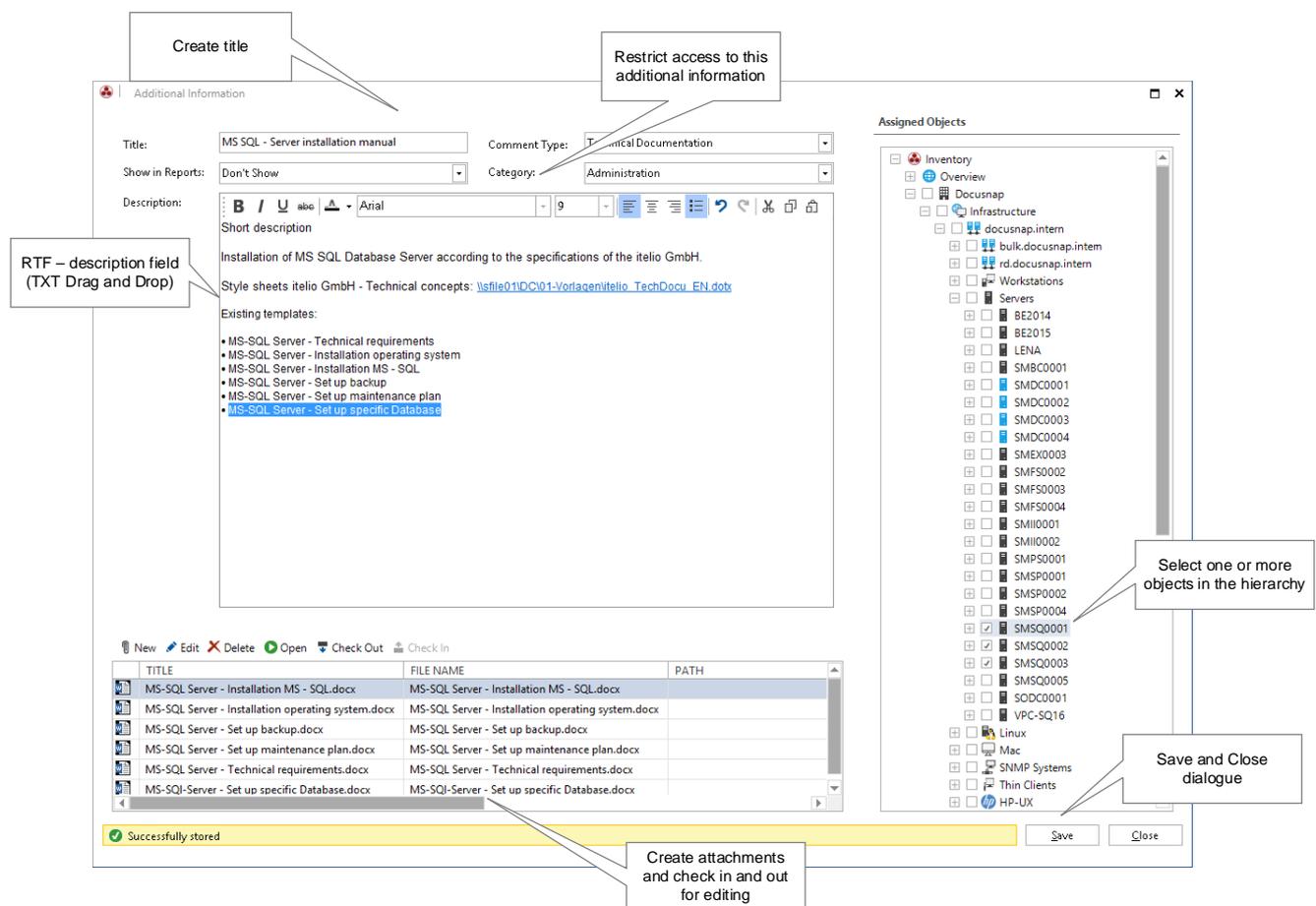


Fig. 4 – Additional information – User interface – Common features

2.1.4 Attachments – Description of features

Additional information can be used to easily provide Docusnap users with required files, such as maintenance plans, manufacturer documentation, or the firmware of a switch, as attachments that reference the corresponding objects.

After saving an additional information item, you can link it with attachments. These can be files of any type.

Basically, there are two ways to add attachments:

- Click the *New* button to open the *Add Attachment* dialog. There, you can enter a name for the attachment. Next, click to select the file. Optionally add a description. Then, click the *Save* button to save the attachment in the database.
- Another way to associate files with an additional information item is by using drag & drop. Just drag the desired file to the list of attachments (see figure 5).

The files are stored directly in the database as BLOBs (binary large objects), so that the Docusnap database grows in size with every additional information item added. As a new feature in Docusnap X, you can now select multiple files in the Explorer and add them to the Attachments panel by drag & drop.

2.1.4.1 Checking in / checking out attachments

Attachments you added can be saved back to the file system directly from Docusnap. After completing your edits, you can check the file back into the Docusnap database. For these actions, corresponding buttons are available in the attachments panel. Select the desired attachment and click **Open** to load it and open it in the associated application (depends on the file type).

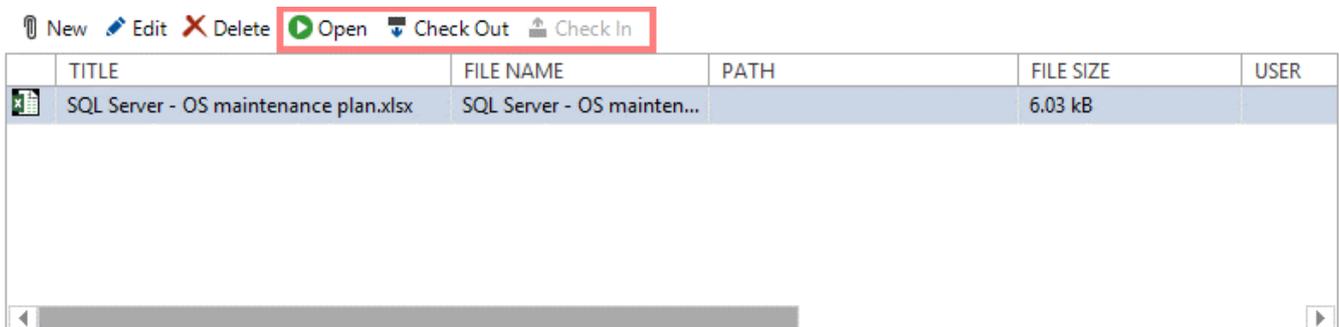


Fig. 5 – Managing attachments – Buttons

By specifying the check-out path (under *Options* > *General Options* > *System Paths / Files*), you can set the directory to be used for saving the attachment to the file system. If multiple users work with Docusnap, make sure to select a directory for which all Docusnap users have the appropriate permissions.

2.2 Comments

2.2.1 Comments – Features and examples

Comments are the most common type of additional information and can be used universally. The **Description** field allows you to create formatted comments that may include URL and UNC links. Typical examples are maintenance plans, system change logs, installation instructions, and documents related to data security.

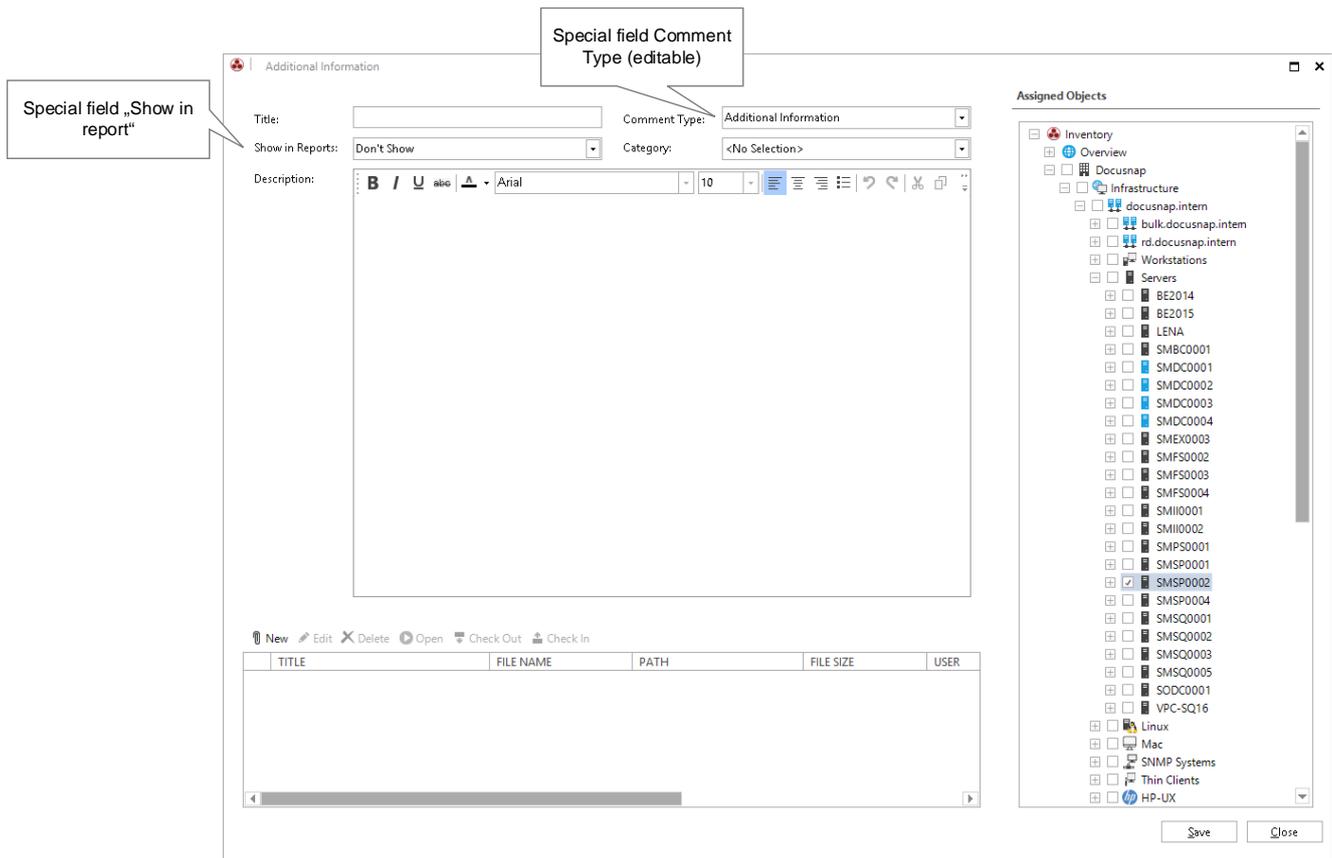


Fig. 6 – Additional information – Comments

Special case: License Management – Creating Comments

Besides the method described above, it is also possible to create comments in the License Management module when creating a new license. The comments you write there are automatically linked with the newly created license.

2.2.2 Special fields for comments

2.2.2.1 "Show in Report" special field for comments

A Docusnap datasheet is a highly detailed report on a system. For this specific report type, you can use the options under **Show in Reports** to specify whether this comment will automatically be included in the report and if so, whether it will be displayed at the beginning or at the end of the report.

2.2.3 Customizing the comment type data field

You can add, delete, or edit values displayed in the **Comment Type** list box. To access the corresponding dialog, select *Options > Management > General*:

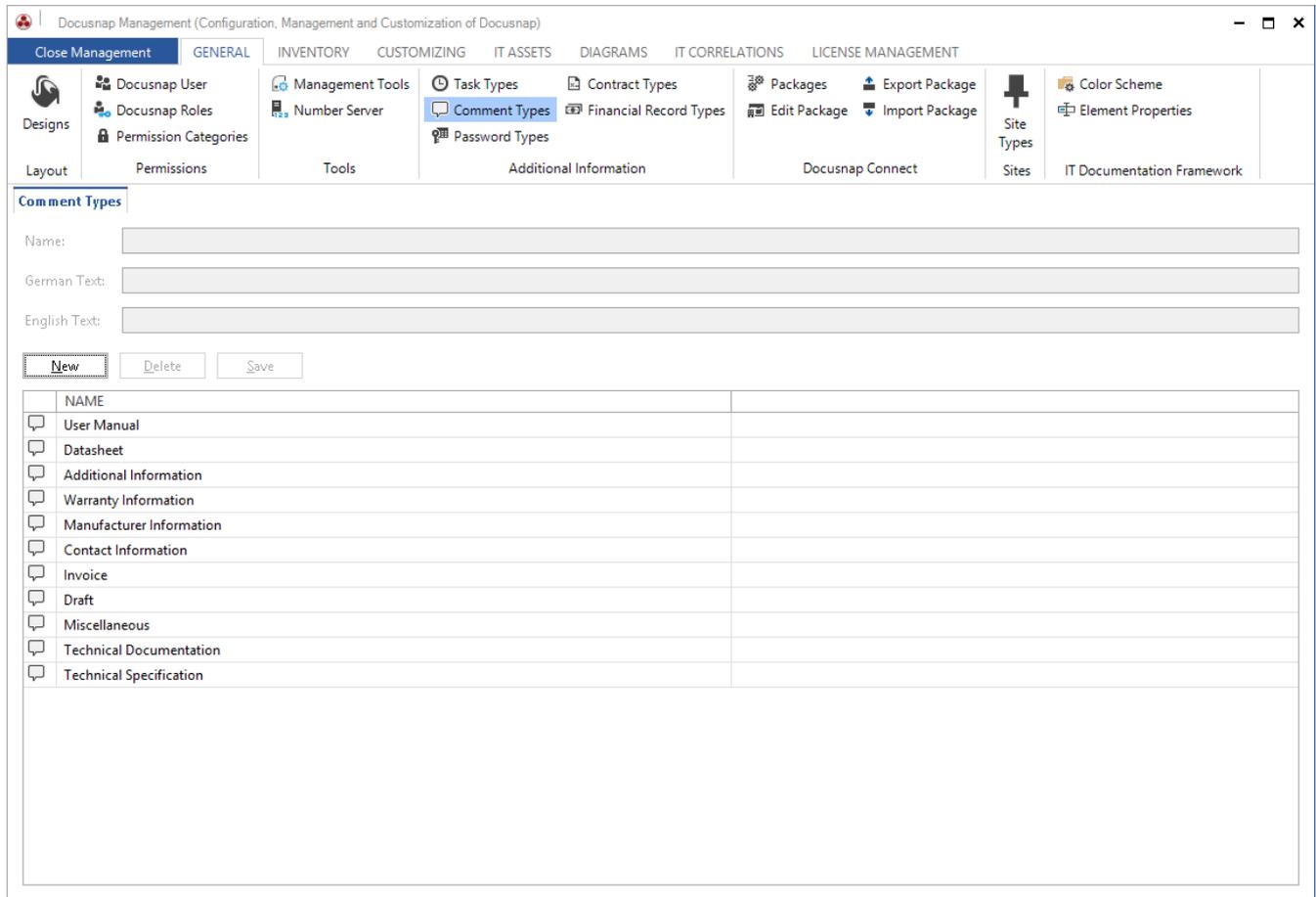


Fig. 7 – Customizing the Comment Type data field

2.3 Financial records

2.3.1 Financial records – Features and examples

This type of additional information allows you to add business information to objects. Default data fields for purchasing data, depreciation, and costing are available.

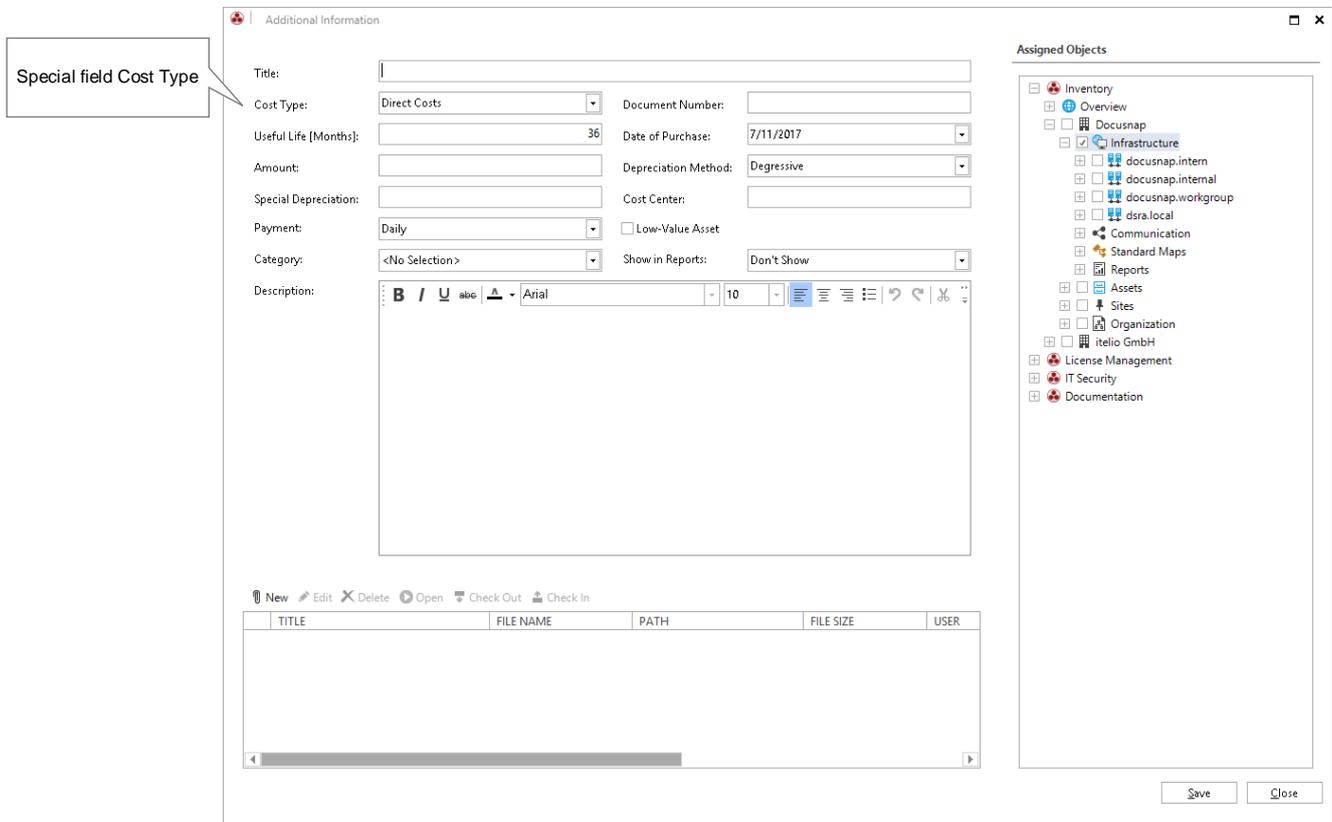


Fig. 8 – Additional information – Financial records

2.3.2 Customizing financial record types (cost type data field)

You can add, delete or edit values of the Cost Type data field.

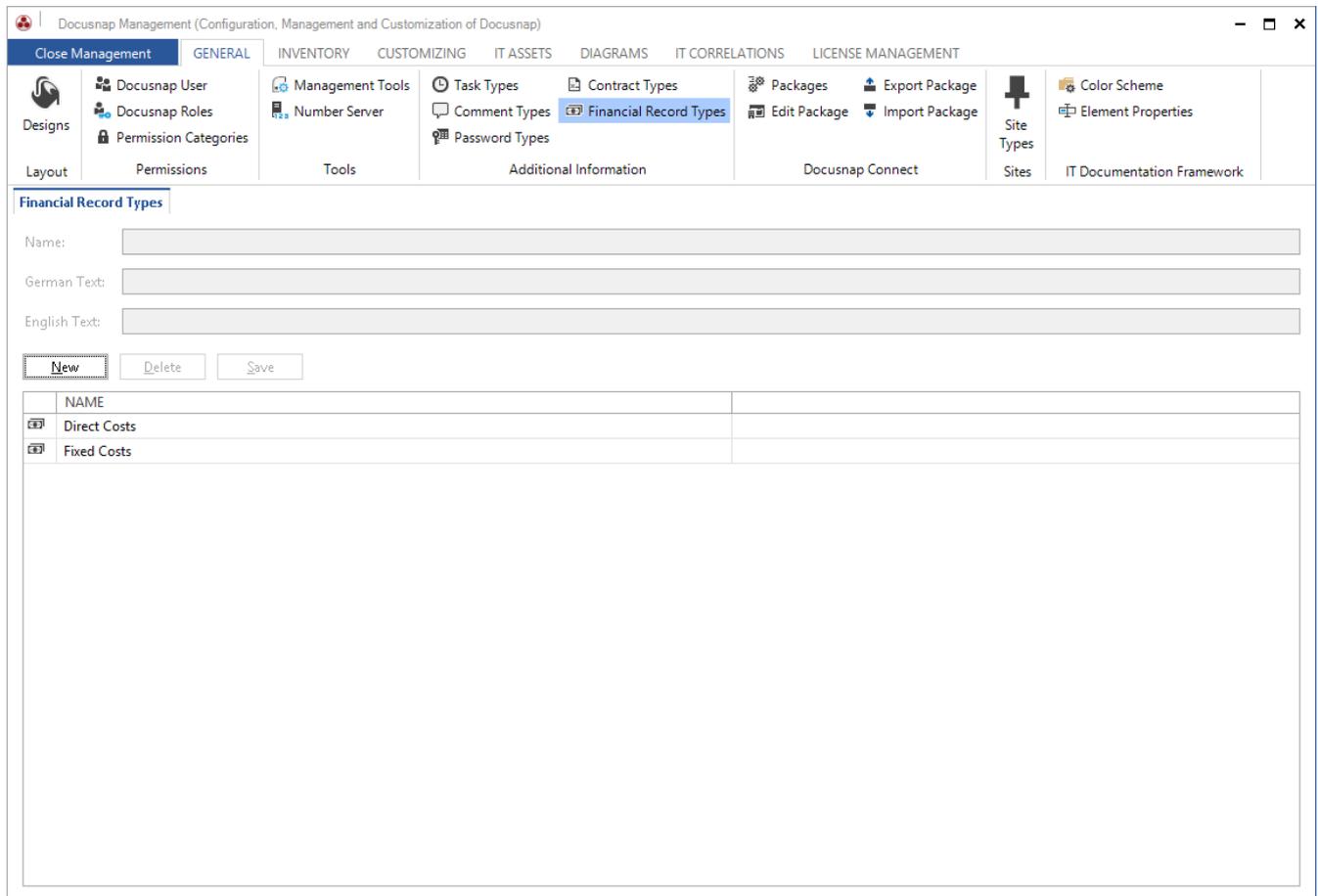


Fig. 9 – Cost Type special field - Customizing financial record types

2.4 Passwords

2.4.1 Passwords – Features and examples

The Password additional information type allows you to store sensible passwords that refer to objects, such as system, user, or domain passwords, in encrypted form in the Docusnap database. For this type of additional information, it makes particular sense to use the Category data field to restrict the access to a password to Docusnap users with the corresponding permissions.

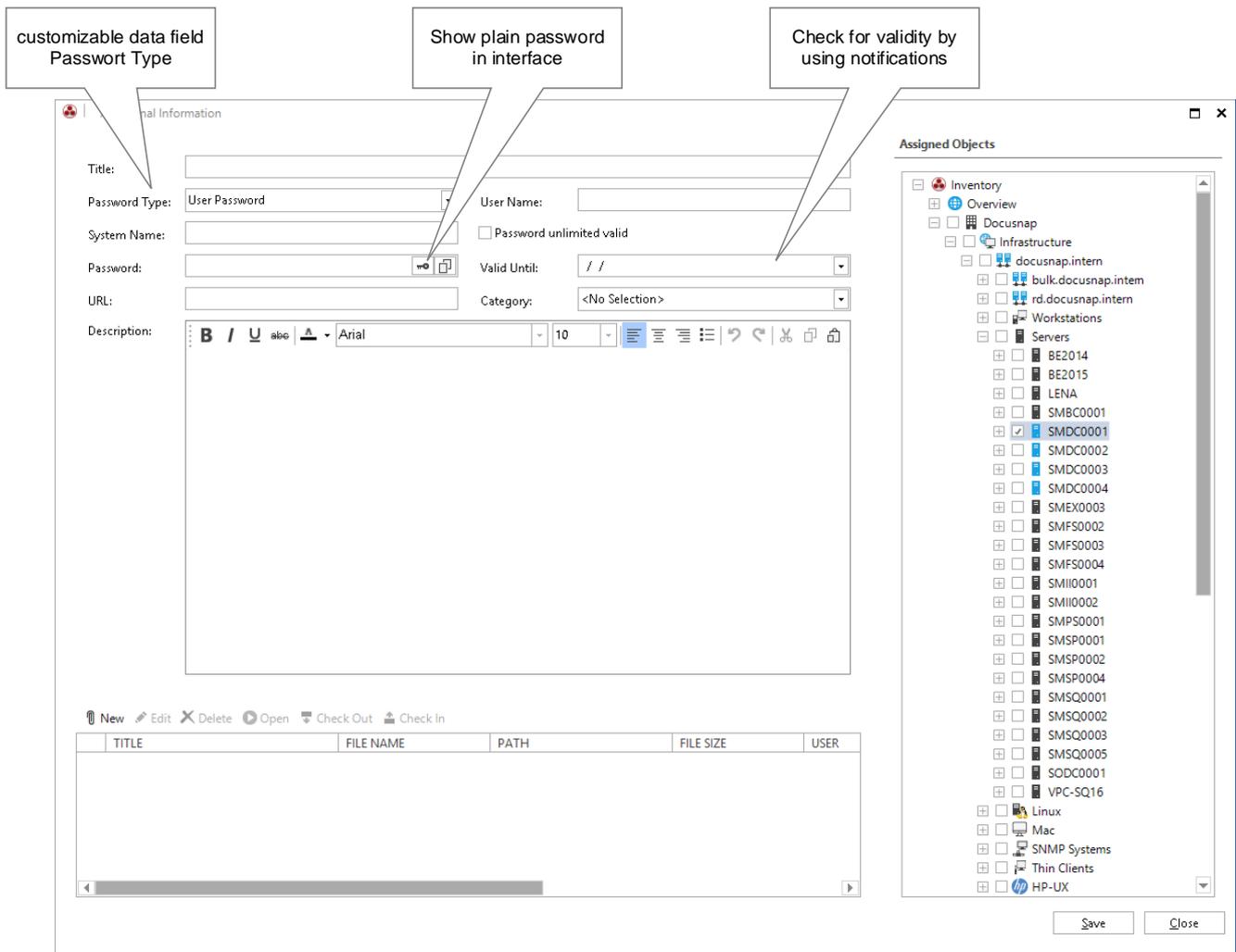


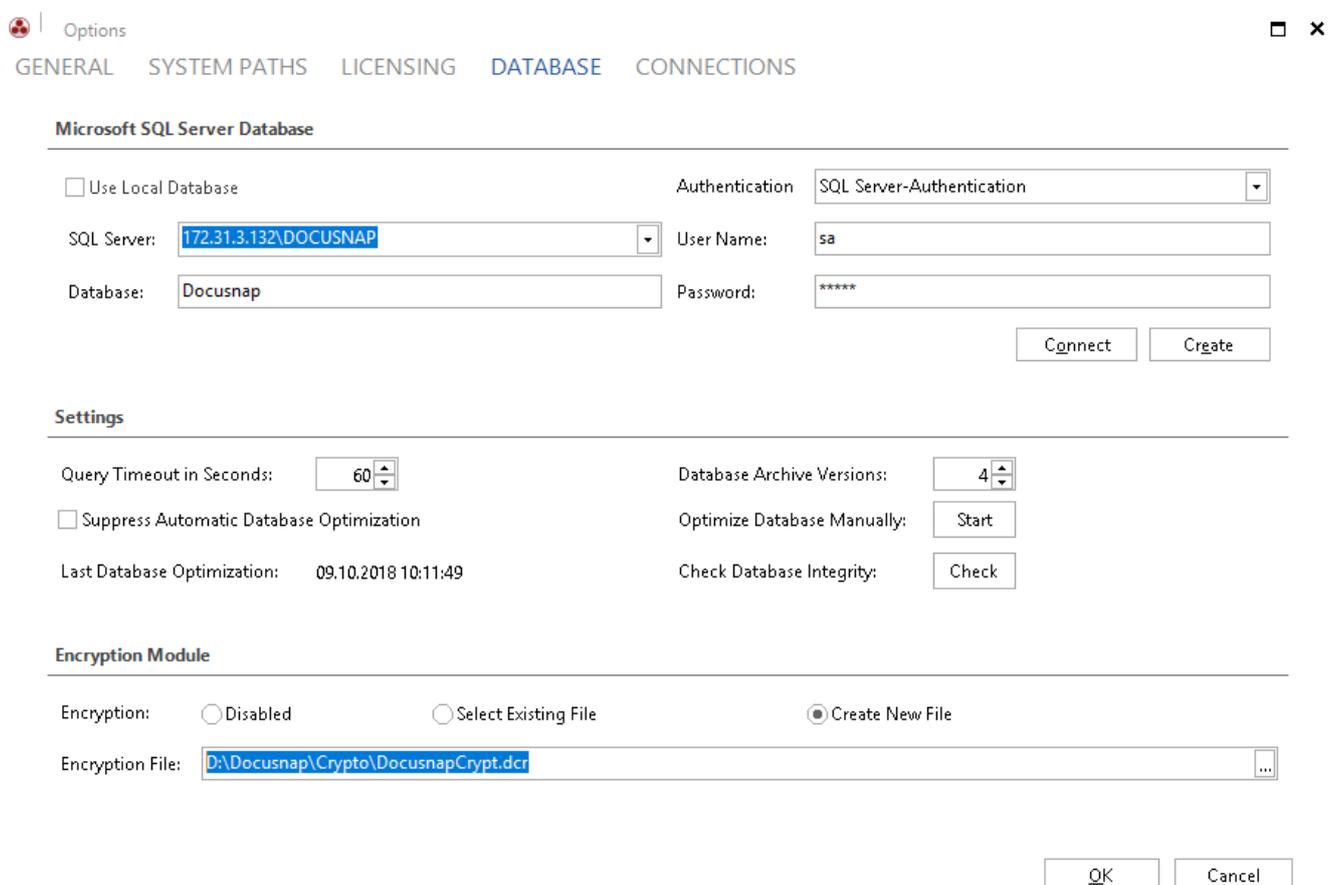
Fig. 10 – Additional information – Passwords

2.4.2 Encryption module – Description of features

Passwords are double-encrypted. The first encryption method uses the Rijndael 256-bit key. The resulting data is then encrypted for a second time using the customer's encryption key. This key has either been created in the *Create Database* dialog when setting up Docusnap or can be created later under *Options – General Options – Database*. Every Docusnap database can only be associated once with a customer encryption key. If this key is lost, even itelio is no longer able to decrypt the passwords recorded in the database. You can use a customer key for multiple Docusnap databases.

2.4.2.1 Creating the encryption file for the Docusnap database

Customer keys are created in the dialog shown below. You can do so either during the basic installation or at a later time by selecting *Options – General Options – Database*.



The screenshot shows the 'Options' dialog box with the 'DATABASE' tab selected. The 'Microsoft SQL Server Database' section includes a 'Use Local Database' checkbox (unchecked), an 'Authentication' dropdown set to 'SQL Server-Authentication', a 'SQL Server' dropdown set to '172.31.3.132\DOCUSNAP', a 'User Name' field with 'sa', a 'Database' field with 'Docusnap', and a 'Password' field with '*****'. There are 'Connect' and 'Create' buttons. The 'Settings' section includes 'Query Timeout in Seconds' (60), 'Database Archive Versions' (4), 'Suppress Automatic Database Optimization' (unchecked), 'Optimize Database Manually' (Start), 'Last Database Optimization' (09.10.2018 10:11:49), and 'Check Database Integrity' (Check). The 'Encryption Module' section has three radio buttons: 'Disabled' (unchecked), 'Select Existing File' (unchecked), and 'Create New File' (checked). The 'Encryption File' field contains 'D:\Docusnap\Crypto\DocusnapCrypt.dcr'.

Fig. 11 – Creating a customer encryption key

2.4.2.2 Docusnap Server – Updating the database configuration

After creating a customer encryption key, make sure that this change is also registered in the Docusnap Server configuration dialog. *Options > Docusnap Server*

Server Configuration - □ ×

1 Server Start Settings 2 **Server Database** 3 Server Mail Settings 4 Server API 5 Server Settings

Microsoft SQL Server Database

Authentication:

SQL Server: User Name:

Database: Password:

Settings

Query Timeout in Seconds:

Encryption Module

Encryption: Disabled Select Existing File Create New File

Encryption File:

✔ Database opened successfully

Fig. 12 – Docusnap Server – Configuring a customer encryption key

2.4.3 Special fields for passwords

2.4.3.1 Special fields for passwords – Password validity

By selecting *Inventory > Scheduling > Define Notifications*, you can configure a scheduled job to check, e.g., which passwords will expire within the next three months. This information is sent automatically to the specified recipients by e-mail.

We created a detailed HowTo document that describes how to define these notifications in Docusnap.

[Download the "Defining Notifications" HowTo document](#)

2.4.3.2 Special fields for passwords – Displaying a password in plain text

Click the “key and text” button to the right of the **Password** data field to toggle the display of the password entered between asterisks and plain text.

2.4.4 Customizing the password type data field

You can add, edit or delete values displayed in the **Password Type** list box. To access the corresponding dialog, select *Options > Management > General*:

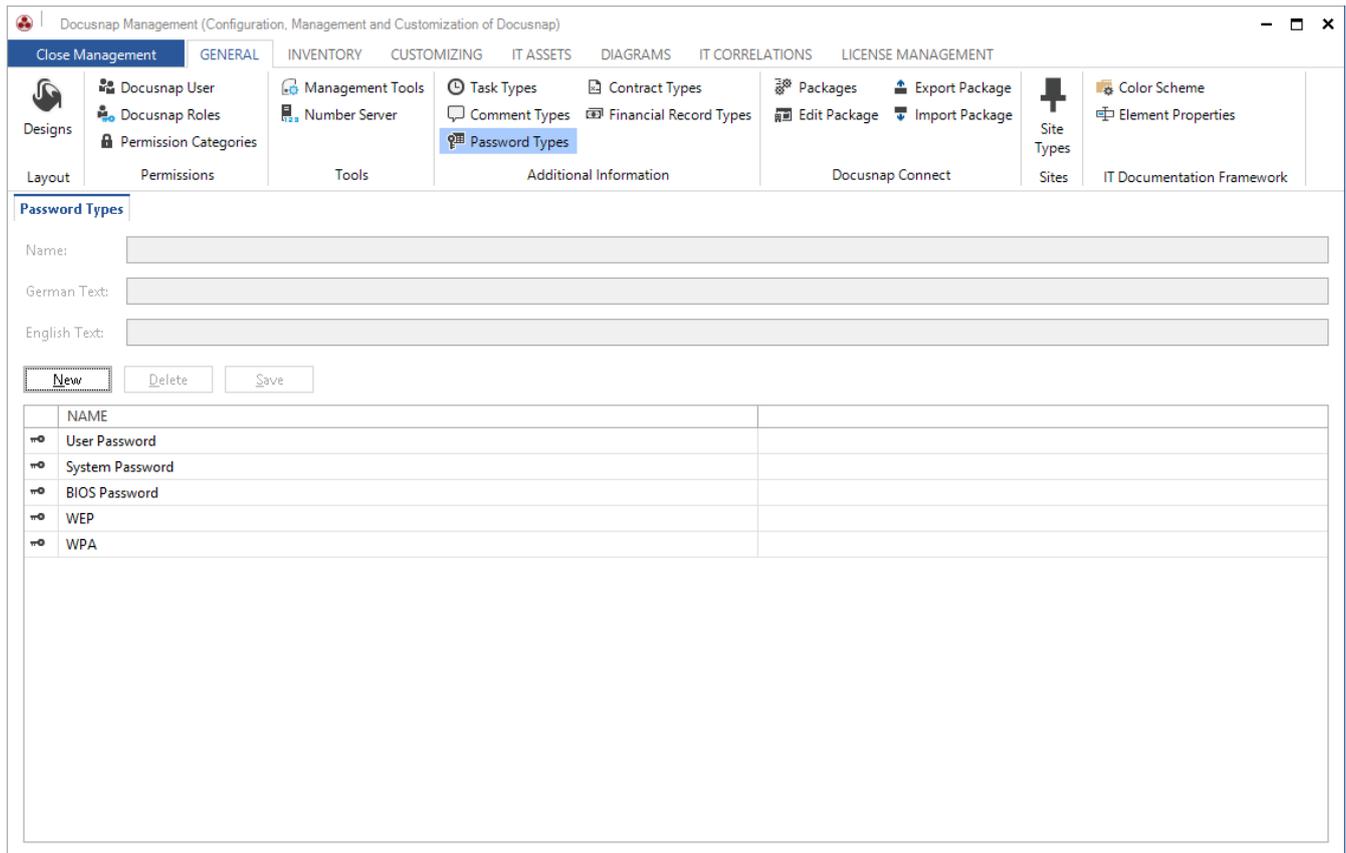


Fig. 13 – Customizing the Password Type data field

2.5 Contracts

2.5.1 Contracts – Features and examples

This type of additional information allows you to manage contracts in Docusnap X. The corresponding dialog contains special data fields for the contact data of the contracting partner, the contract number, the start date, and the end date of the contract. Maintenance contracts for servers are a typical example. Due to the fact that n:m relations can be defined in Docusnap X, each maintenance contract that is valid for multiple servers only needs to be created once. It can then be assigned to multiple servers in the hierarchy.

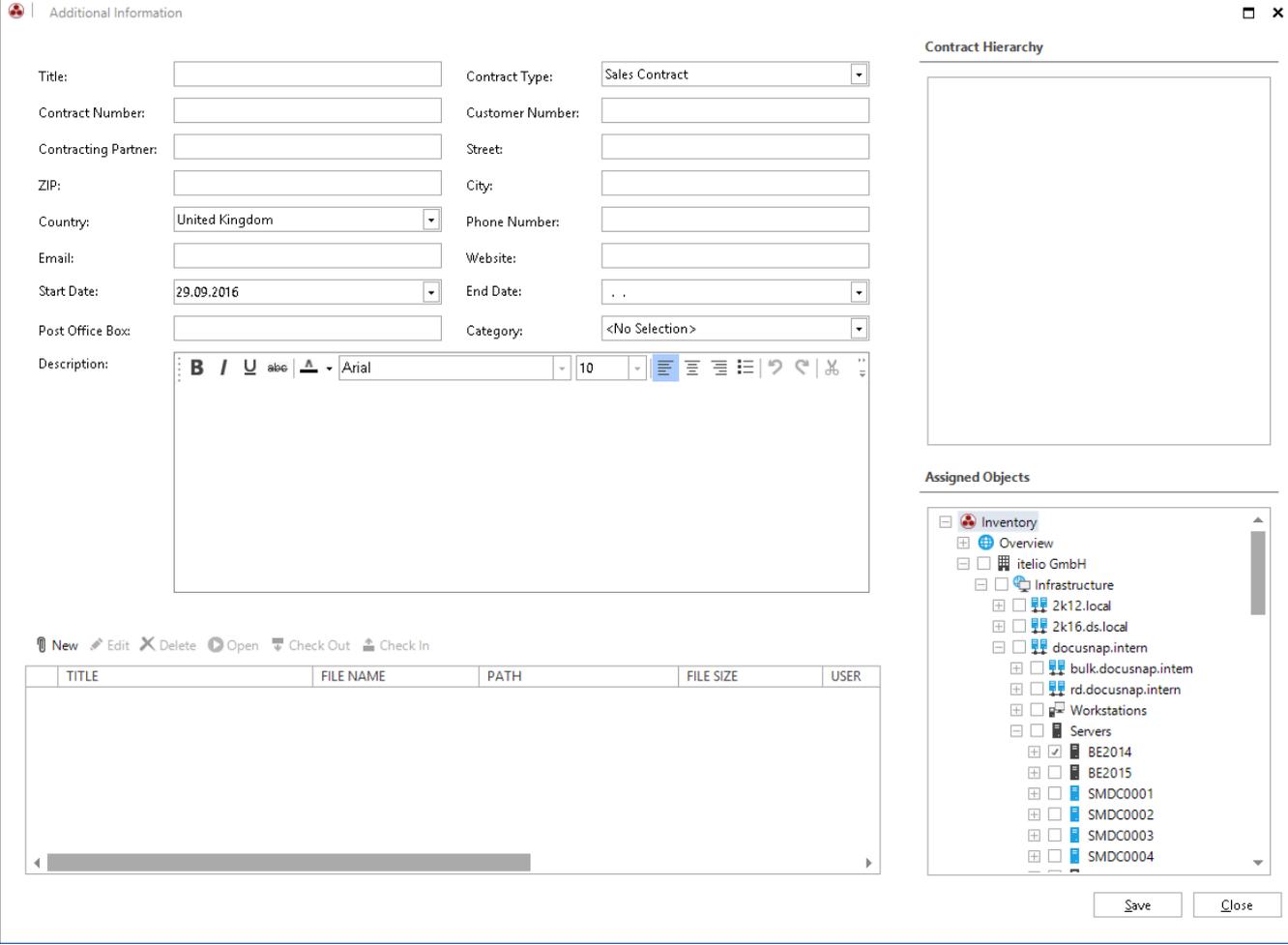


Fig. 14 – Additional information – Contracts

Special case: License Management – Creating Contracts

Besides the method described above, it is also possible to create contracts in the License Management module when creating a new license. The contracts created there are automatically linked with the corresponding license.

2.5.2 Special fields for contracts

2.5.2.1 Special fields for contracts – End date

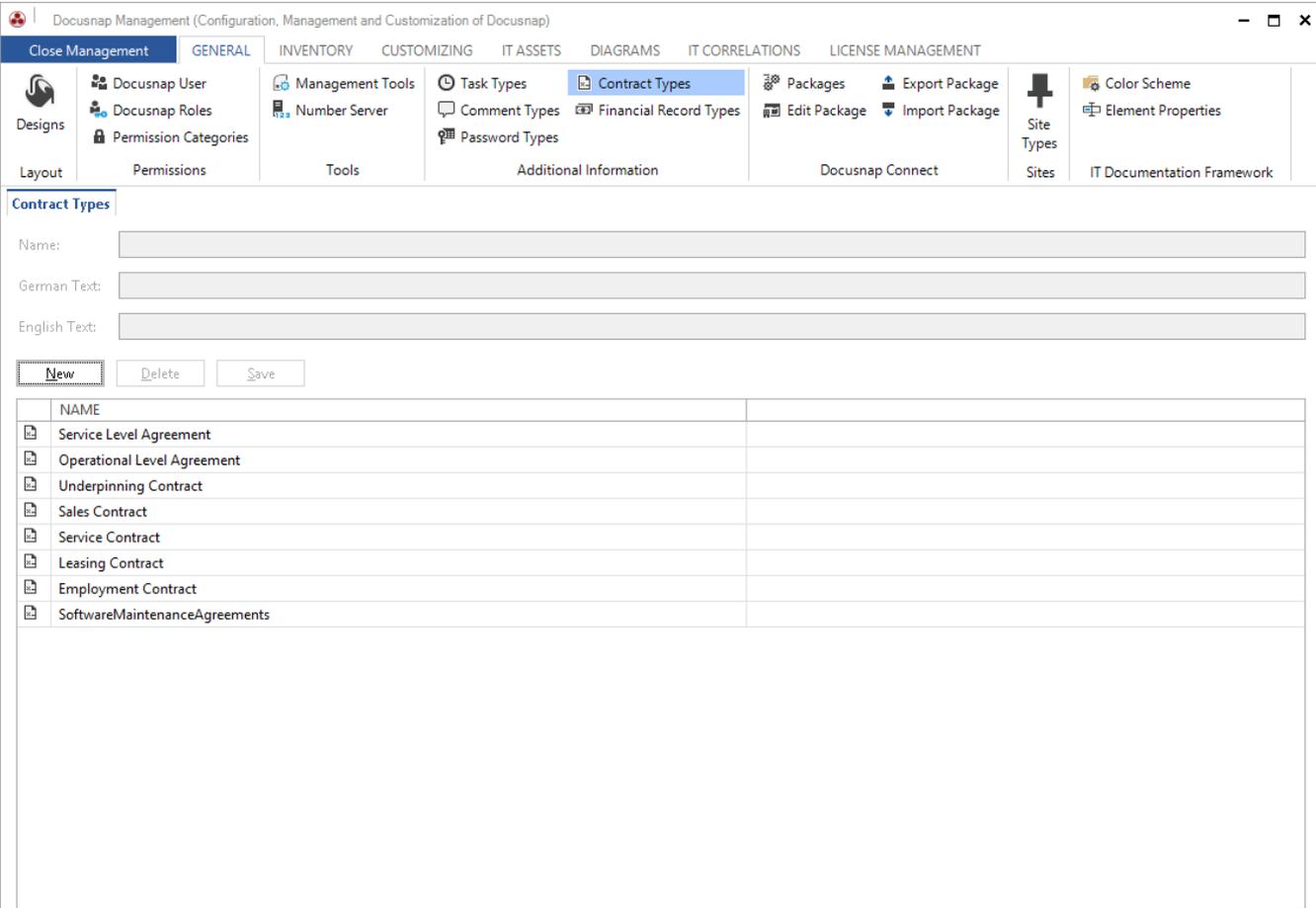
By selecting *Inventory > Scheduling > Define Notifications*, you can configure a scheduled job to check, e.g., which contracts will expire within the next three months. This information is sent automatically to the specified recipients by e-mail.

We created a detailed HowTo document that describes how to define these notifications in Docusnap.

[Download the "Defining Notifications" HowTo document](#)

2.5.3 Customizing the contract type data field

You can add, edit, or delete values displayed in the **Contract Type** list box. To access the corresponding dialog, select *Options > Management > General*:



The screenshot shows the 'Contract Types' configuration dialog in the Docusnap Management application. The interface includes a navigation menu with categories like 'Close Management', 'GENERAL', 'INVENTORY', 'CUSTOMIZING', 'IT ASSETS', 'DIAGRAMS', 'IT CORRELATIONS', and 'LICENSE MANAGEMENT'. The 'Contract Types' section is active, showing a list of contract types with columns for 'NAME' and an empty column for additional information.

NAME	
Service Level Agreement	
Operational Level Agreement	
Underpinning Contract	
Sales Contract	
Service Contract	
Leasing Contract	
Employment Contract	
SoftwareMaintenanceAgreements	

Fig. 15 – Customizing the Contract Type data field

2.6 Tasks

2.6.1 Tasks – Features and examples

The Task additional information type is ideally suited to store tasks (with the required documents as attachments) in Docusnap. If you have defined your notifications accordingly, you will be notified automatically each time a task is due. A typical use case is the periodical maintenance of UPS equipment.

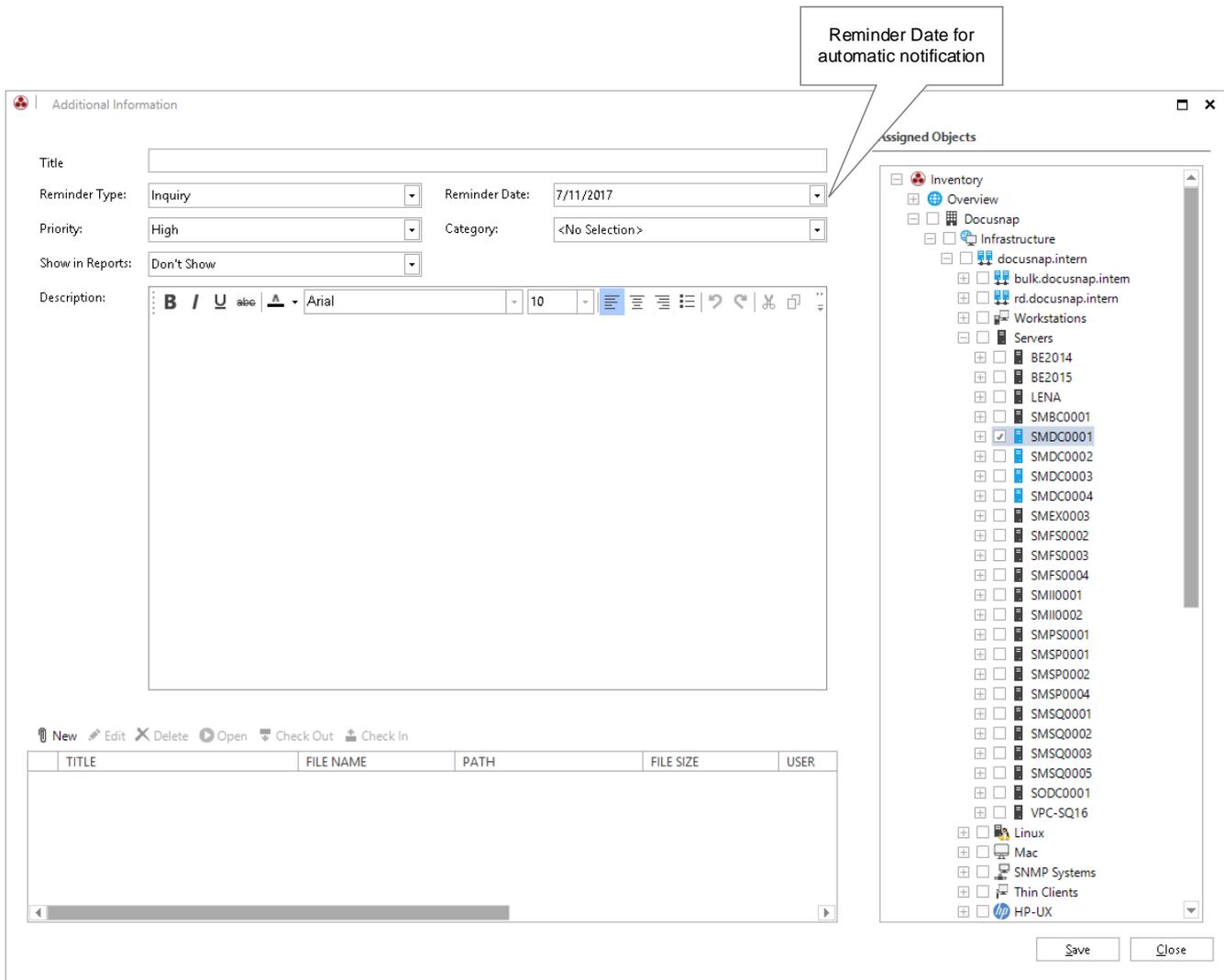


Fig. 16 – Additional information – Tasks

2.6.2 Special fields for tasks

2.6.2.1 Special fields for tasks – Reminder date

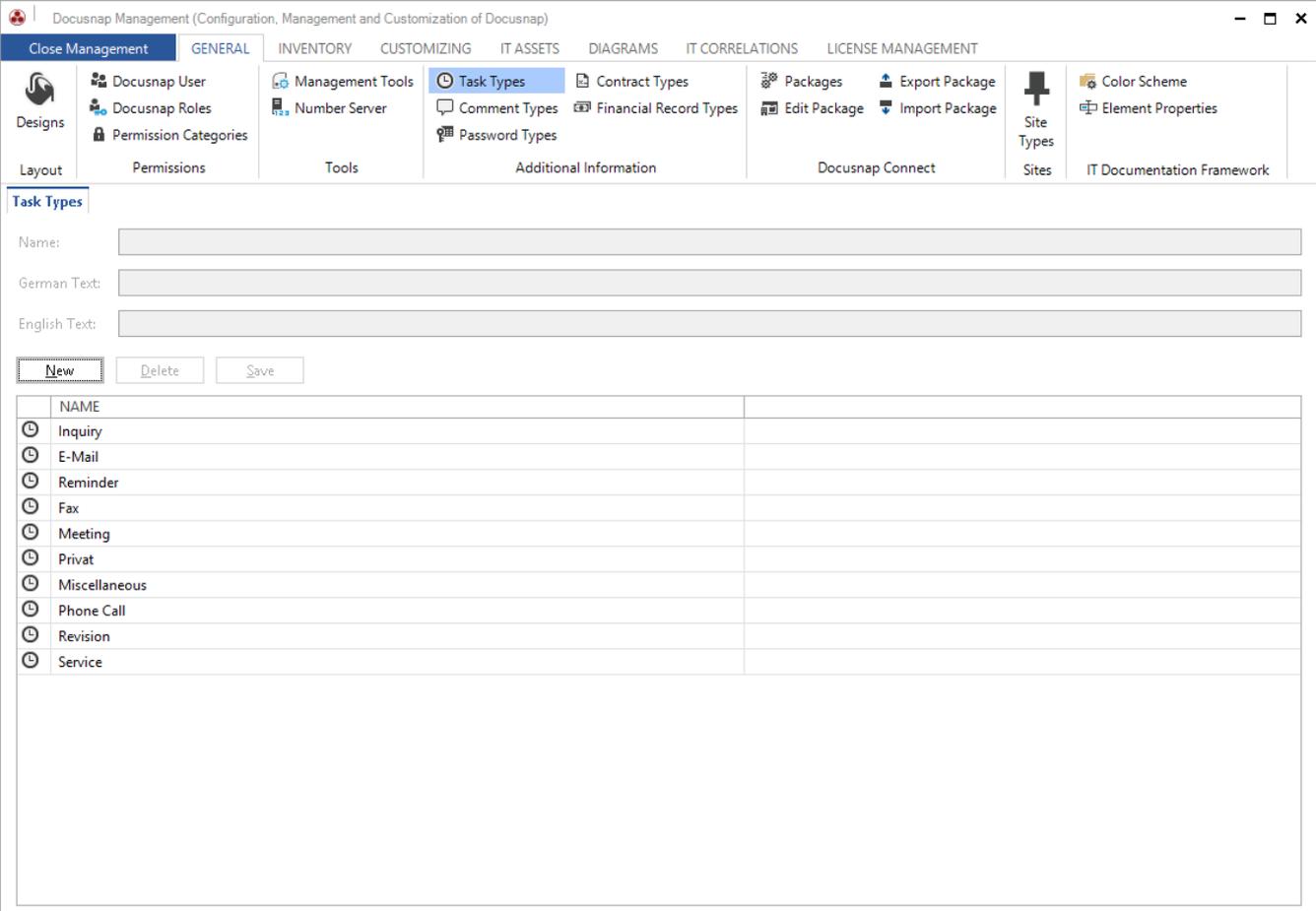
By selecting *Inventory > Scheduling > Define Notifications*, you can configure a scheduled job to check, e.g., which task is due within the next month. This information is sent automatically to the specified recipients by e-mail.

We created a detailed HowTo document that describes how to define these notifications in Docusnap.

[Download the "Defining Notifications" HowTo document](#)

2.6.3 Customizing the reminder types data field

You can add, edit, or delete values displayed in the **Reminder Type** list box. To access the corresponding dialog, select *Options > Management > General*:



The screenshot shows the 'Task Types' configuration window in Docusnap Management. The window title is 'Docusnap Management (Configuration, Management and Customization of Docusnap)'. The navigation pane on the left includes 'Close Management', 'GENERAL', 'INVENTORY', 'CUSTOMIZING', 'IT ASSETS', 'DIAGRAMS', 'IT CORRELATIONS', and 'LICENSE MANAGEMENT'. The 'GENERAL' section is active, showing options for 'Docusnap User', 'Docusnap Roles', and 'Permission Categories'. The 'Task Types' sub-section is selected, displaying a list of task types. Below the list are input fields for 'Name:', 'German Text:', and 'English Text:', along with 'New', 'Delete', and 'Save' buttons.

NAME	
Inquiry	
E-Mail	
Reminder	
Fax	
Meeting	
Privat	
Miscellaneous	
Phone Call	
Revision	
Service	

Fig. 17 – Customizing the Reminder Type data field

3. Docusnap Web

Docusnap X is the first version of Docusnap that provides read access to the Docusnap database contents without the need to have Docusnap installed. Provided that a corresponding browser is available and the Docusnap Server system is reachable, you can use Docusnap Web to access the database from any terminal device.

A HowTo document called “Docusnap X – Docusnap Web Installation” covers this topic.

This document and further HowTo documents are available from the [HowTo area](#) of our website.

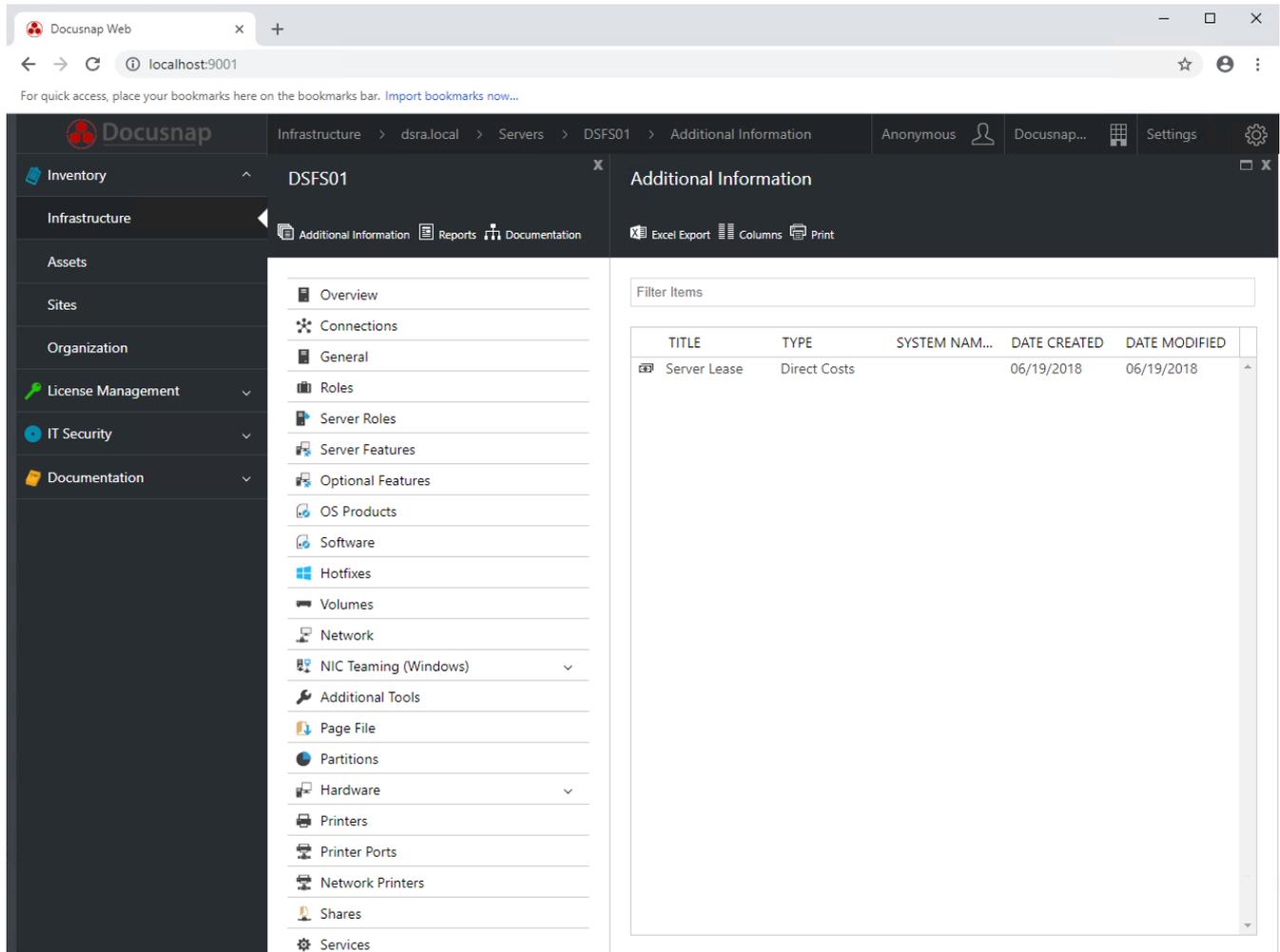


Fig. 18 – Docusnap Web – Accessing additional information

4. Additional information – Migration from Ver. 6.x (Customizing and Reporting)

4.1 Introduction

In Docusnap X, it is possible to assign additional information to more than one node. This means that an object may contain multiple additional information items and any additional information item can in turn be assigned to multiple objects. This is called an n:m relation. To enable this functionality in the new version, it was necessary to modify the data structure for additional information.

During the update from Docusnap 6.3 to Docusnap X, all existing additional information items are copied to the new data structure and therefore are preserved. Reports supplied by Docusnap were adapted for Docusnap X.

The statements for any views customized either through the Docusnap Customizing module or created by the users themselves cannot be accommodated automatically. This means that you need to adapt them manually.

4.2 Data structure

The tExtensions table is used to group all additional information items in a single table and to add attachments. In Docusnap version 6.3, the ObjectID and ObjectType columns are used to define for which object each additional information item was created. The ObjectType column contains the ObjectTypeID of the respective object and the ObjectID column holds the primary key of the assigned object.

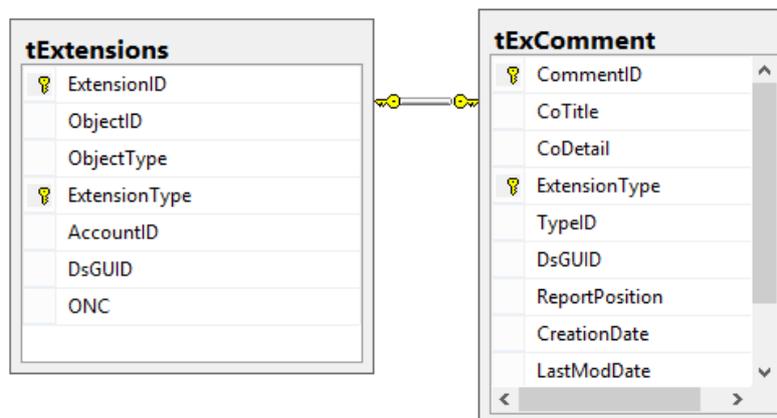


Fig. 19 – Data Structure in Docusnap 6.3

Docusnap X creates another table, tExtensionsMapping, to enable the assignment of additional information to multiple objects. The tExtensions table is used in Docusnap X to group the additional information items and to add attachments.

The ObjectID and ObjectType columns were moved to the tExtensionsMapping table. The tExtensionsMapping table is used to assign the additional information items to multiple nodes. Moreover, the AccountID column has been moved to the tExtensionsMapping table.

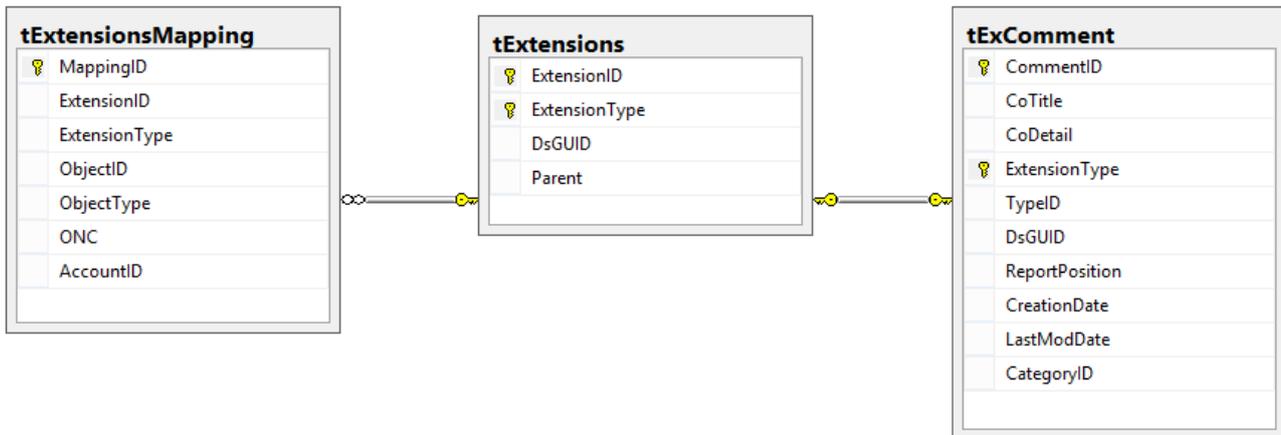


Fig. 20 – Data Structure in Docusnap X

4.3 Modifying statements

Any SQL statement used in Docusnap 6.3 that included the ObjectID, ObjectType, or AccountID columns, must be modified accordingly.

Between tExtensions and the additional information item, there is a 1:1 relation. The primary key of the additional information item and the ExtensionID are therefore identical. This means that, in most SQL statements, the tExtensions table can be replaced with the tExtensionsMapping table.

If the statements were used for a report, remember to modify the SQL statement in the report. The data sources were created within the dictionary of the report. By right-clicking the respective data source and then clicking the **Edit** button, you open the Edit Data Source dialog where you can modify the statement.

4.4 Example

The following example displays all contact comments (ObjectTypeID = 3) associated with a particular contact (FilterID).

SQL Statement 6.3:

```
select tExComment.* from tExtensions, tExComment where tExtensions.ObjectType = 3 and
tExtensions.ExtensionID = tExComment.CommentID and tExtensions.ObjectID = {FilterID}
```

SQL Statement X:

```
select tExComment.* from tExtensionsMapping, tExComment where tExtensionsMapping.ObjectType = 3
and tExtensionsMapping.ExtensionID = tExComment.CommentID and tExtensionsMapping.ObjectID =
{FilterID}
```

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VERSION HISTORY

Date	Description
August 15, 2016	Version 0.1 – First draft
September 05, 2016	Version 1.0 – Screenshots adapted to the RTM version
September 15, 2016	Version 1.01 – Reference to section 2.1.4, Attachments corrected
October 24, 2018	Version 1.2 – Screenshots updated
