

# Docusnap 6.1 - User Manual

**English Version** 

# **Table of Contents**

Part I Welcome	10
1 New Features in Desugnan 6.1	10
1 New Features in Docusinap 6.1	
Part II Introduction	14
1 About Docusnap	14
2 Conventions	16
3 System Requirements	
	18
4 Installation	
5 Getting Started	
6 Upgrade 6.0 to 6.1	
7 User Interface	
Menu Ribbon	
Inventory	
Documentation	
Management	
Advanced	
Tools	
Help	
Permission Analysis	
License Management	
Organization	
Reporting System	
IT Relations	51
IT Concept	
IT Concept Editor	
Data Explorer	59
Data Explorer	
IT Documentation	
Permission Analysis	
License Management	
Organization	
IT Relations	
II Concept	
Main Window	
Information	
	76
Benerte	
Extensions	79
EXCENSIONS	79
Documents Permission Analysis	80
Permission Structure	
Group Policies	
Structure	
IT Relations	
IT Concepts	
8 Basics Wizards	
Ontional: Scheduling	
Optional: Import	
Optional: Export	
· · ·	

9 Filtering	
10 Search	
Part III Inventory	102
1 Network Inventory	
Basic Stens	
Company Selection.	
Authentication	
Summary Page	
Status	
Summary Page	
Optional: Naming Snapshots	
Windows	112
Windows Systems	113
IP Segments	114
Offline Systems	116
Optional: Software Search	117
Optional: Additional Tools	118
SNMP Systems	119
Linux Systems	
Mac Systems ·····	123
CIFS	
Exchange Server	
VMware Infrastructure	126
Hyper-V	
Internet Information Service	129
SharePoint	130
SQL Server	
XenCenter ·····	
Active Directory	
DHCP Server	
DNS Server ·····	
2 Scripting	136
Windows	
Import Scripts	
Exchange	
3 Manual Entries	142
Part IV Documentation	146
1 General	
2 Creation of Documentation	
	440
Basic Steps	
Company Selection	
Domain Selection	
Summary Page	
Status	
Report Page	
Map Files	
Network Map	
Topology	
Active Directory	
Exchange Server	
VMware Infrastructure	
Hyper-V	
SQL Server	
DHCP Server	

XenCenter	
	165
Overview Map	
System Groups	
Data Sheets	
2 IT Documentation	
	472
4 Print Documentation	173
Part V Permission Analysis	178
1 Structure	179
2 Menu Ribbon	180
3 Inventory	182
File System	
Inventory Permissions	183
Online Analysis	187
NTFS Filter	
SharePoint	
Exchange	
Permission Analysis	
Determining the Effective Permissions	
	206
Part VI License Management	200
1 General	
2 License Management Wizard	210
Company Selection	210
Category	211
Category Group	
Category Group Product Desclust lefe	
Category Group Product Product Info Notes	
Category Group Product Product Info Notes Keywords	211 211 212 212 214 214 215 215
Category Group Product Product Info Notes Keywords License Types (Expected)	211 211 212 214 214 215 215 215 220
Category Group Product Product Info Notes Keywords License Types (Expected) System Assignment	211 211 212 212 214 215 215 215 220 220
Category Group Product Product Info Notes Keywords License Types (Expected) System Assignment User Assignment	211 211 212 214 214 215 215 220 220 222 224
Category Group Product Product Info Notes Keywords License Types (Expected) System Assignment User Assignment Inventory Determination (Actual)	211 211 212 214 214 215 215 220 222 224 224 226 227
Category Group Product Product Info Notes Keywords License Types (Expected) System Assignment User Assignment Inventory Determination (Actual) Summary Page	211 211 212 214 215 215 215 220 222 224 224 226 227 227 228
Group Product Product Info Notes Keywords License Types (Expected) System Assignment User Assignment Inventory Determination (Actual) Summary Page 3 System Exclusions	211 211 212 214 214 215 215 220 222 224 224 226 227 228 228 229
Group Product Product Info Notes Keywords License Types (Expected) System Assignment User Assignment Inventory Determination (Actual) Summary Page 3 System Exclusions 4 Export Definitions	211 211 212 214 214 215 215 220 222 224 224 226 227 228 227 228 229 230
Category Group Product Product Info Notes Keywords License Types (Expected) System Assignment User Assignment Inventory Determination (Actual) Summary Page 3 System Exclusions 4 Export Definitions 5 Import Definitions	211 211 212 214 215 215 215 220 222 224 224 226 227 228 227 228 229 229 229 229 230
Group         Product         Product Info         Notes         Keywords         License Types (Expected)         System Assignment         User Assignment         Inventory Determination (Actual)         Summary Page         3 System Exclusions         4 Export Definitions         5 Import Definitions         6 Evaluations         7 Undesired Products	211 211 212 214 215 215 220 222 224 226 227 228 227 228 229 229 230 231 231
Category Group Product Product Info Notes Keywords License Types (Expected) System Assignment User Assignment Inventory Determination (Actual) Summary Page 3 System Exclusions 4 Export Definitions 5 Import Definitions 6 Evaluations 7 Undesired Products 8 Docusnap TS Info	211 211 212 214 215 215 220 222 224 224 226 227 228 229 230 230 231 234
Category       Group         Product       Product Info         Notes       Notes         Keywords       License Types (Expected)         System Assignment       User Assignment         User Assignment       Inventory Determination (Actual)         Summary Page       3 System Exclusions         4 Export Definitions       5 Import Definitions         5 Import Definitions       6 Evaluations         7 Undesired Products       8 Docusnap TS Info	211 211 212 214 215 215 220 222 224 224 226 227 228 229 230 231 231 234
Category Group Product Product Info Notes Keywords License Types (Expected) System Assignment User Assignment Inventory Determination (Actual) Summary Page 3 System Exclusions 4 Export Definitions 5 Import Definitions 6 Evaluations 7 Undesired Products 8 Docusnap TS Info	211 211 212 214 215 215 220 222 224 226 227 228 229 230 231 234 234 238
Group       Group         Product       Product Info         Notes       Notes         Keywords       License Types (Expected)         System Assignment       User Assignment         User Assignment       Inventory Determination (Actual)         Summary Page       3 System Exclusions         4 Export Definitions       5 Import Definitions         5 Import Definitions       6 Evaluations         7 Undesired Products       8 Docusnap TS Info         Part VII Organization       1 Extensions	211 211 212 214 215 215 220 222 224 224 226 227 228 229 230 231 231 234 234 234 238 238
Group Product Product Info Notes Keywords License Types (Expected) System Assignment User Assignment Inventory Determination (Actual) Summary Page 3 System Exclusions 4 Export Definitions 5 Import Definitions 6 Evaluations 7 Undesired Products 8 Docusnap TS Info <b>Part VII Organization</b> 1 Extensions Comments	211 211 212 214 215 215 220 222 224 226 227 228 229 230 231 231 234 234 234 238 238 238
Group Product Product Info Notes Keywords License Types (Expected) System Assignment User Assignment Inventory Determination (Actual) Summary Page 3 System Exclusions 4 Export Definitions 5 Import Definitions 6 Evaluations 7 Undesired Products 8 Docusnap TS Info Part VII Organization 1 Extensions Comments Finances	211 211 212 214 215 215 220 222 224 226 227 228 229 230 231 231 234 234 234 238 238 238
Group       Product         Product Info       Notes         Notes       Keywords         License Types (Expected)       System Assignment         User Assignment       User Assignment         Inventory Determination (Actual)       Summary Page         3 System Exclusions       Export Definitions         5 Import Definitions       6 Evaluations         7 Undesired Products       8 Docusnap TS Info         Part VII Organization         1 Extensions       Comments         Finances       Passwords         Passwords       Passwords	211 211 212 214 215 215 220 222 224 224 226 227 228 229 230 231 231 234 234 234 234 238 238 238
Category Group Product Product Info Notes Keywords License Types (Expected) System Assignment User Assignment Inventory Determination (Actual) Summary Page 3 System Exclusions 4 Export Definitions 5 Import Definitions 6 Evaluations 7 Undesired Products 8 Docusnap TS Info Part VII Organization 1 Extensions Comments Finances Passwords Contracts Reminders	211 211 212 214 214 215 215 220 222 224 224 226 227 228 229 230 231 231 234 234 234 234 238 239 239 230 231 234

2	Organization	245
3	Password Logging	248
4	Categories and Permissions	249
Part VIII	IT Relations	254
1	Create IT Relations	254
2	Userdefined Settings	258
Part IX	IT Concept	262
1	Menu Ribbon	262
2	Create Concept	268
	General	269
	IT Concept Editor	
	Text	
	Table of Contents	
	Data Element	
	File	281
	Мар	
	IT Relation	
	Datasneet	
3	Versions	
4	Templates	
	Designs	291
5		201
6	Styles	
7	Export and Scheduling	
8	Assignment	295
9	Conversion	296
Part X	IT Assets	298
1	IT Assets Structure	298
2	Create IT Assets	304
3	Other Inventory	304
4	Export	
5	Import	305
Part XI	Docusnap Server	308
1	Configuration	
- 2	loh Management	
2		316
5		217
4	Logging	
Part XII	Docusnap Connect	320
1	Configuration	320
2	Schedule Package	324
3	Import and Export	330
Part XIII	Data Import	332

1 Wizard	332
Part XIV Docusnap Link	338
Part XV Settings	340
1 Options	
General	
Licensing	
Database	
Wizards	
Additional Tools	
Documentation	354
License Management	356
Update	
2 Designs	
Designs	
Report Settings	358
Edit Designs	359
Edit Styles	359
IT Concept	
3 Company Settings	
Desgins	
Report Settings	
Edit Designs	
Edit Styles	
4 Management	
Inventory	
SNMP Types	
SNMP Mibs	
Server Roles	
Active Directory	
Software Search	
License Management	
Software Categories	
License Types	
Maintenance Types	
Extension Types	
Financial Types	379
Descoverd Types	381
Beminder Types	382
Comment Types	
User Management	
Roles	
Users	
Categories	
Permissions	
Part XVI Data Organization and Analysis	392
1 Comparison	
2 Snapshot Management	
3 System Groups	
4 FaciPlan	
5 ADS Comparison	

401	6 Database Import
405	7 Database Export
410	8 Move Systems
412	9 Merge Systems
416	Part XVII Advanced Topics
416	1 Management Tools
418	2 Merge Reports
420	3 Notifications
	Define Notifications
	4 Report Scheduling
427	5 Options Configuration File
430	Part XVIII Support & Help
430	1 Update
431	2 Problem Resolution
434	3 FAQ



# 1 Welcome

#### Welcome to Docusnap 6.1

Thank you very much for purchasing Docusnap 6.1.

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 6.1 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 6.1 supports the reporting of the results using several standardized formats (Microsoft Word & Excel, PDF and HTML files, among others).

Docusnap 6.1 generates meaningful and real-world reports and analyses of the most diverse corporate departments.

In no time, Docusnap 6.1 analyzes effective permissions, compares the expected and actual states of installed licenses and provides additional organizational features, such as password and contract management.

Docusnap 6.1 combines optimum usability with maximum flexibility. Wizards guide the user through the intuitive user interface which is similar to Microsoft Office 2007.

Multiple users can work with Docusnap 6.1 concurrently. Customization to individual requirements is also possible.

# 1.1 New Features in Docusnap 6.1

#### **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 <u>data</u> <u>import</u>.

Docusnap comes with many 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.

#### IT Concepts

Docusnap 6.1 allows you to create IT concepts based on inventoried data, existing documentation, and IT relations. This module lets you create concepts independently of any text processing program. The creation of such concepts can

be scheduled using the Docusnap server, if desired.

# Docusnap Connect

With its *Docusnap Connect* interface, Docusnap can be used to make data available to other systems. No in-depth database or SQL knowledge is required to define export formats and transfer them to other systems and formats.

# DocusnapLink

DocusnapLink allows you to quickly and efficiently link to detailed Docusnap data from third-party systems.

# Data Import

To process large data volumes which cannot be inventoried in Docusnap, the data import feature is now available. It allows you to import data which have been stored in a CSV file to Docusnap.

# Permission Analysis of Exchange Mailboxes, Mailbox Folders, and Public Folders

In addition to the permission analysis for directories and shares as well as Microsoft SharePoint, Docusnap 6.1 lets you analyze the permission structure of Microsoft Exchange.

# Inventory of XenCenter

With Docusnap 6.1, you can inventory and document XenCenter data.



# 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 6.1 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 6.1 does not use any agents for the inventory process, provides concurrent multi-user capability, and can be upgraded with a multi-license, if required.

# Docusnap 6.1 Features

- IT Inventory Process
  - Automated scanning of the entire IT environment (without agents), assisted by

standardized network protocols

- Script-based inventory process
- Archiving and version comparison of the individual scans

#### Visualization

- Automated preparation and output of values scanned from the IT environment in the form of network maps, data sheets and overview lists in various formats (.pdf, .html, .docx and .xlsx).
- More than 100 predefined reports
- Report Designer for creating customized reports

#### Customizing

- Visual design of documents and reports in line with your corporate identity
- Customizing module for adjustment and extension of objects, data structures and the user interface

#### Docusnap Server

• Automated, scheduled inventorying and documentation.

#### Organization

- Reminder and comments feature
- Password safe & contract management
- File attachments

#### Usability

- Wizard-based application
- Intuitive, dual-language (German & English) user interface similar to MS Office 2007

#### **Optional Modules**

The core module provides the basic features for scanning Windows systems. Using optional modules, it is possible to adjust and license Docusnap based on the individual needs of our customers.

The following modules are available for Docusnap 6.1:

- Permission Analysis Determination and analysis of effective permissions
- License Management Comparison of expected and actual states for installed and purchased licenses including contract management
- Virtualization
   Inventory of VMware infrastructures, Hyper-V and virtualized computers

- SQL Server
   Scanning of SQL servers (servers, databases, tables, columns, DTS packages)
- DHCP / DNS Servers Inventory and documentation of DHCP and DNS servers
- SharePoint Inventory and permission analysis of SharePoint systems
- Linux Inventory and documentation of Linux-based systems
- Mac
   Inventory and documentation of Mac-based systems
- Customizing
   Adjustment and extension of objects, data structures and the user interface

# 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

System requirements for the installation of Docusnap 6.1

Operating Systems:	Windows XP min. SP 2, Windows Vista, Windows 7, Windows 8	
	Server 2003, Server 2008, Server 2008 R2, Server 2012	
RAM:	>512 MB, recommended 1 GB	
Resolution:	1024 x 768 min., recommended > 1280 x 1024	
.Net Framework:	Version 3.5	
Windows Installer:	Version 2.0	
Database: *	SQL 2005 Express	
	SQL 2005 Standard / Enterprise	
	SQL 2008 Express	
	SQL 2008 Standard / Enterprise	
	2008 R2, 2012	
Microsoft Office: **	Visio 2007 SP1, 2010,2013	

\* The installation of Docusnap includes an .mdb database. However, the use of the database systems specified above is recommended.

\*\* Microsoft Office Visio 2007 SP1, Visio 2010 or Visio 2013 is required for the creation of maps.

\*\* No external programs are required for generating documents.

\*\* To view the documents, programs that support the following file formats can be used:

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

#### **Inventory Process**

Operating Systems:	Windows NT, XP, Vista, Windows 7, Windows 8
	Windows Server NT, 2000, 2003, 2008, 2008 R2, 2012
	Linux (32 / 64 Bit) – SuSe, Red Hat, Kubuntu, Ubuntu
	Mac

SNMP: Version 1, 2, 3

Modules: Exchange: 2003, 2007, 2010, 2013

SQL: 2000, 2005, 2008, 2008 R2, 2012

Permission Analysis for Windows Systems or CIFS / SMB emulations, SharePoint installation and Exchange installation

VMware: Virtual Center 3.5 / 4.0 / 5.0, ESX Server 3.5 / 4.0 / 5.0 and VMware Server

Microsoft Hyper-V

XenCenter

Microsoft DHCP/DNS

Microsoft Internet Information Services (IIS): Versionen 6.0, 7.0, 7.5

Microsoft SharePoint: SharePoint Server 2007/2010, SharePoint Services 3.0, Microsoft SharePoint Foundation

#### 2.4 Installation

Executing the Docusnap.exe file starts the installation process for Docusnap 6.1.



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

🛃 Docusnap 6 Setup
End-User License Agreement Please read the following license agreement carefully
SOFTWARE LICENSE AGREEMENT
In consideration for your use of the software and any updates, customizations and/or enhancements, entitled Docusnap ("Software") provided by itelio GmbH, Franz-Larcher-Straße 4, 83088 Kiefersfelden, Germany ("Licensor"), you ("User") agree to the following terms and conditions. If you do not agree to these terms, you may not install the software and you must return the package to your point of purchase immediately for a refund.
☑ I accept the terms of this License Agreement
Back Next Cancel

The next step lets you specify the Docusnap installation directory.

😸 Docusnap 6 Setup	
Destination Folder Where would you like Docusnap 6 to be installed?	
Install Docusnap 6 to:	
Change	
<u>B</u> ack Nex	t Cancel

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

B Docusnap 6 Setup	
Ready to install Docusnap 6	
Click Install to begin the installation. Click Back to review or change any o settings. Click Cancel to exit.	f your installation
Back	Cancel
波 Docusnap 6 Setup	X
Docusnap 6 Setup	
Docusnap 6 Setup Installing Docusnap 6 Please wait while Docusnap 6 is installed.	
Docusnap 6 Setup Installing Docusnap 6 Please wait while Docusnap 6 is installed. Status: Copying new files	
Docusnap 6 Setup      Installing Docusnap 6      Please wait while Docusnap 6 is installed.      Status: Copying new files	
Docusnap 6 Setup  Installing Docusnap 6  Please wait while Docusnap 6 is installed.  Status: Copying new files	
Docusnap 6 Setup Installing Docusnap 6 Please wait while Docusnap 6 is installed. Status: Copying new files	



# 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.

Configuration			<u>ېڭ 6.1</u>
Welcome System Requirements		Welcome to Docusnap	6.1
<ul> <li>Economy</li> <li>Database</li> <li>Settings</li> <li>Encryption</li> <li>Server Start Settings</li> <li>Finish</li> </ul>	Docusnap 6.1	Thank you very much for choosing Docusnap to document and analyze your IT environment. This wizard will configure Docusnap for further use. The configuration includes the following tasks.	The following steps will be performed: System requirements check Specify the license information Create the Docusnap database Customize settings Create your personalized encryption file
			New features in Docusnap 6.1 Creation of custom concepts Improved documentation Inventory of MS SharePoint, MS Hyper-V and MS IIS
			Extensions for existing modules Interactive dashboards for easier operation Next Cancel

In the first step, the *system requirements* will be checked. If the system requirements are not met, Docusnap will run anyway, but not to its full capacity.

#### Required Components

Microsoft Visio is required to create maps.

*Remote Tools* are required to scan DNS, DHCP, and Exchange servers.

Exchange Tools are required to scan the Exchange server.

*Linux Tools* are required to scan Linux systems.

DNS Tools are required to scan DNS servers.

In the *Resolution check*, the system checks whether the required screen resolution has been set.

 $\bigcirc$ 

) Welcome CI	heck System Requirements for Docusnap	0:		
System Requirements		Check System	Requirements	
) Licensing	Action	Progress	Status	
Database	Check Microsoft Visio		Successful	
	Check Remote Tools		Successful	
Settings	Check Exchange Tools		Successful	
Freedom	Check Linux Tools		Successful	
Encryption	Check DNS Tools		Successful	
Server Start Settings	Check Besolution		Successful	

The next step consists in selecting the Docusnap license file. Docusnap can only be used with a valid license file. The modules covered by the specified license will be displayed under *Licensed Modules*. Modules not covered by the license will be automatically disabled in Docusnap. To enable disabled modules, you need to purchase a corresponding license.

The *License Mode, License Type, Company,* and *Address* of the company as well as the number of licensed *Windows, Linux* and *Mac* nodes will be displayed next to the list of modules.

Three different *license modes* are available:

- Full Version: License without any time limits.
- Time-limited license: License with time limits.
- Demo Version: Time-limited test version

Two different *license types* are available:

- Multi-license: With this license type, multiple companies can be created.
- Individual license: With this license type, only a single company can be created.

The Number of Windows Systems, Number of Linux Systems, and Number of Macintosh Systems fields indicate how many systems may be scanned using this license.

Configuration			ø <b>ў</b> <mark>6.1</mark>
Configuration Welcome System Requirements Configuration System Requirements Configuration System Requirements Configuration System Requirements Configuration System Requirements Configuration System Requirements Configuration System Requirements Configuration System Requirements Configuration System Requirements Configuration System Requirements Configuration Configuration Configuration Configuration Configuration Configuration Configuration Configuration Configuration Configuration Configuration Configuration Configuration Configuration Configuration Configuration Configuration Configuration Configuration Configuration Configuration Configuration Configuration Configuration Configuration Configuration Configuration Configuration Configuration Configuration Configuration Configuration Configuration Configuration Configuration Configuration Configuration Configuration Configuration Configuration Configuration Configuration Configuration Configuration Configuration Configuration Configuration Configuration Configuration Configuration Configuration Configuration Configuration Configuration Configuration Configuration Configuration Configuration Configuration Configuration Configuration Configuration Configuration Configuration Configuration Configuration Configuration Configuration Configuration Configuration Configuration Configuration Configuration Configuration Configuration Configuration Configuration Configuration Configuration Configuration Configuration Configuration Configuration Configuration Configuration Configuration Configuration Configuration Configuration Configuration Configuration Configuration Configuration Configuration Configuration Configuration Configuration Configuration Configuration Configuration Configuration Configuration Configuration Configur	Please select your license file: Select License: License Mode: Full Versi License Type: Multi Lice Company: Docusna Street: Franz-La Zip Code: 83088 Number of Windows Systems:	Lice ion ense ip AG rcher-Straße 4 City: Kiefersfelden 939393	6.1  Remove  Remove  Second State  Action  Between  Second State  Second State Sta
	Number of Linux Systems: Number of Mac Systems:	999999 999999	Image: Second

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

#### Microsoft SQL Server

Compatibility: SQL Server 2005 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.

#### Microsoft Access Database

The installation of Microsoft Access as an application is not required for using a Microsoft Access database. Docusnap uses predefined application interfaces from the .NET framework for communicating with Access. We recommend to use Access databases only locally.

The status of the database connection is represented visually by the following symbols:





Not connected to the database

Successfully connected with the database

Configuration	<u>ېڭ</u> 6.1
Welcome	Please select a database type:
System Requirements	Microsoft SQL Server Database
Database	SQL Server:     SDEVSQL01     Image: Authentication:     SQL Server-Authentication       Database:     Docusnap     User Name:     Sa
Encryption	Password: Exercise Connect Create
<ul> <li>Server Start Settings</li> </ul>	(Status)
Finish	Activity       Progress       Status         Updating database       Database updated successfully         Checking Basic Data       Basic data updated successfully         Checking Type Data       Type data updated successfully         Checking Settings       Settings updated successfully         Checking Stings       Settings updated successfully         Checking Sting DATE       StMP Schema updated successfully         Checking ADS Schema       ADS Schema updated successfully         Checking Metaschema       Metaschema updated successfully         Checking Metaschema       Metaschema updated successfully
	Image: 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.

- 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.
- 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.
- IT Concept Path: The <u>IT concepts</u> you create are saved under the IT Concept path.
- Check-out path: When defining <u>Extensions</u> 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.

Configuration			<u>ېڭ (6.1</u>
S Welcome	Define Docusnap Settings:		
<ul> <li>System Requirements</li> <li>Licensing</li> <li>Database</li> </ul>	Occumentation Path:	(Documentation)	
Settings	l coal Sattings	Settings	
Encryption     Server Start Settings	Team Settings:     IT Concept Path:	SFILE01\Docusnap     Setungs     SFILE01\Docusnap     SFILE01\Docusnap	
Finish		(Attachments )	
	Check Out Path:	C:\Docusnap\Check-Out	
		,	
			<u>B</u> ack <u>N</u> ext 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 become lost.



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.

On the *Server Start Settings* page, you can define a user who has sufficient permissions to start the Docusnap Server.

Configuration		<mark>ه (</mark> 0)
🚯 Welcome	Configure Docusnap Server:	
🚦 System Requirements	General	
Licensing	Startup Type: Automatic	
J Database		
Settings	Change Server Login	
Encryption	User: intern\Administrator	
Server Start Settings	Password: xxxxx	
Server Database	Remark: If no user and password is entered, Docusnap Server uses the local system account. If	the system account doesn't have
Server Mail Cattings	permissions for the database, Docusnap Server exits with an error.	
E Server Mail Settings		
Server Settings		
) Finish		
		<u>B</u> ack <u>N</u> ext Cance

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

	Please select a data	base type:	SQL Server Data	Dase OAccess	s Database
<ul> <li>System Requirements</li> <li>Licensing</li> <li>Database</li> <li>Settings</li> <li>Encryption</li> </ul>	SQL Server: Database:	SDEVSQL01 Docusnap	(Microsoft S	GL Server Database Authentication: User Name: Password:	SQL Server-Authentication  Sa Connect Create
Server Start Settings				Status	
<ul> <li>Server Valabase</li> <li>Server Mail Settings</li> <li>Server Settings</li> <li>Finish</li> </ul>	Activity Updatir Checki Checki Checki Checki	ng database ng Basic Data ng Type Data ng Stifings ng SNMP Schema ng ADS Schema ng Metaschema	Progress		Status       Database updated successfully       Basic data updated successfully       Type data updated successfully       Settings updated successfully       SNMP Schema updated successfully       ADS Schema updated successfully       Metaschema updated successfully

Docusnap provides notifications for particular areas, 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* fields will be enabled so that you can enter the required information.

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 text boxes blank or disable this step by removing the checkmark from the *Configure Email Settings* checkbox.

Configuration		ېڭ <mark>6.1</mark>
& Welcome	Configure Em	ail Settings:
System Requirements		SMTP Settings
U Database	SMTP Server:	eMailServer01.docusnap.intern
🚱 Settings		SMTP Port
Server Start Settings		Authentication
Generation State S	User: Password:	admin 🔀
Server Mail Settings		
<ul> <li>Server Settings</li> <li>Finish</li> </ul>	Sender:	Sender
	Test Address:	Check Settings
	Tost Address.	The country control check dguings
		<u>B</u> ack <u>N</u> ext Cancel

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 <u>IT concepts</u> you create are saved under the IT Concept 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.

Configuration			<u>ېڭ 6.1</u>
& Welcome	Define Docusnap Server Settir	igs:	
System Requirements		Documentation	
licensing	Ocumentation Path:	C:\Docusnap\Docu	
间 Database		Cattinne	
Ge Settings	I local Settings:		
🔒 Encryption	Team Settings:	\\SFILE01\Docusnap	
🏤 Server Start Settings	V roun counge.	·····	
🍖 Server Database			
🏠 Server Mail Settings			
😚 Server Settings			
Finish			
		Back	Next Cancel

When all settings have been defined, the configuration is complete.



Once you have completed the configuration, Docusnap 6.1 will start automatically.

# 2.6 Upgrade 6.0 to 6.1

If you open a database in Docusnap 6.1 that was created with Docusnap 6.0, the *Upgrade wizard* will be launched.

The *Upgrade wizard* converts existing Other Inventory (from versions before 6.1) to IT assets. Inventory items created on the Company level are output as IT assets below the *Account Inventory* heading. If inventory was defined on the domain level, a separate heading is created for each domain and the inventory is listed under that heading.



For Docusnap version 6.1, the IT Concept module was redeveloped. To continue using IT concepts created with Docusnap 6.0, you need to convert them. If legacy IT concepts or legacy IT concept templates exist when you start Docusnap, the *Upgrade wizard* suggests to convert them.

On the *IT Concepts* tab, you can select the IT concepts to be converted. On the *Templates* tab, you can select Docusnap 6.0 templates for conversion. The converted IT concepts will be stored in the folder you selected for IT concepts in the Options dialog.

If not all IT concepts have been converted, the IT Concept ribbon displays the *Docusnap 6.0 Migration* button. Using this button, you can restart the IT concept migration.

Click the *Start* button to start the conversion.

#### Page 33

Docusnap Upgrade	ġ.	6.1
Information	Conversion of IT Concepts	
<ul> <li>IT Concept</li> <li>Status</li> <li>Finish</li> </ul>	IT Concepts       Templates         Image: Docusnap AG       Image: Docusnap AG         Image: Docusnap AG	-
	Deselect all Select all	
	Back Start	

# 2.7 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 located below the Data Explorer.

# 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. Comments, financial data, passwords, contracts and reminders can be added by means of extensions. The reports will be executed on their own tab. The permissions for the folder structure will be analyzed using the Permission Analysis process.

#### 2.7.1 Menu Ribbon

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

🚳   Close							Docusnap 6.1	
Inventory	Documentation	n Managerr	nent Advanced	Tools Help				
	2	🖉 Windows	📕 Mac	CIFS	VMware	🖏 IIS	Exchange	Active Directory
Complete	NTFS	SNMP	P Segment	🚮 Import	Hyper-V	퉳 SharePoint	😥 SQL Server	DHCP Server
Network	Permissions	🔯 Linux	Offline Systems	DocusnapScr	ipt XenCenter			DNS Server
Wi	zard		Systems			Application Serv	'er	Network Services
Invent	ory							
Docun	nentati	on						
Mana	gement	t						
Advan	ced							
Tools								
Help								
Permis	ssion A	nalysis	s (optiona	al)				
Licens	e Mana	ageme	nt (optio	nal)				
Organ	ization	(optio	nal)					
Report	ting (op	otional	)					
IT Rela	itions (	option	al)					
IT Con	cept (o	ptiona	l)					
IT Con	cept Ec	ditor (c	optional)					

#### 2.7.1.1 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 <u>Inventory</u> chapter.

#### Wizard

To launch the Inventory wizard, click the *Complete Network* button. The analysis of the NTFS permissions can be started by clicking the *NTFS Permissions* button.

Details on the NTFS analysis will be described in the Permission Analysis chapter.



#### **Systems**

Depending on the type of system you want to scan, click the associated button in this group. The systems that can be inventoried here are: Windows, SNMP, Linux, Mac, IP Segments, and Offline Systems. CIFS systems (Common Internet File System) can also be scanned. These are systems that simulate a Windows file server (smb, cifs). In addition, you can use the Import button to import script files. When you click the *DocusnapScript* button, a dialog opens where you can select the executable file for creating script files. More information about Docusnap scripts can be found in the <u>Scripts</u> chapter.



# **Application Servers**

By clicking the buttons from the *Application Server* group, wizards for scanning the *VMware Infrastructure, Hyper-V, XenCenter, IIS, SharePoint, Exchange Server, and SQL Server* environments can be launched.



#### **Network Services**

By clicking the buttons in the *Network Services* group, you can start the wizards scanning the Active Directory, DHCP Server, or DNS Server systems.



#### 2.7.1.2 Documentation

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 <u>Documentation</u> chapter. The *Documentation* ribbon consists of three groups:

## General

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.

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* dialog.



### Maps

The following Visio map files can be created:

- Network Maps
- Topology
- Active Directory
- VMware Infrastructure
- Hyper-V
- XenCenter
- Exchange
- SQL Server
- DHCP Server
- System Groups

Different systems located in one domain can be combined into <u>System Groups</u>. Corresponding datasheets and network maps, as well as routing maps, can be created for these system groups.

Potwork Maps	🗗 VMware	Exchange	DHCP Server
🚱 Topology	🚦 Hyper-V	🐌 SQL Server	👠 System Groups
Active Directory	XenCenter		
		Maps	

#### Documents

Use the buttons in the *Documents* group to create datasheets and overviews.

Click the *Create Datasheets* button to open the dialog for creating datasheets.

To generate Excel overviews of the Active Directory system, the Windows computers, and the software, click the *Create Overviews* button.



#### 2.7.1.3 Management

Types and status values can be added from the *Management* ribbon. For a detailed explanation, see the <u>Management</u> chapter. This ribbon consists of four groups.

#### **Docusnap Server**

- Jobs: Clicking the Jobs button opens a dialog where you can manage jobs scheduled in Docusnap.
- <u>Configuration</u>: Click the *Configuration* button to launch the Docusnap Server configuration wizard.
- <u>Notification</u>: 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.
- <u>Define Notification</u>: 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.



#### IT Assets

<u>Manage IT Assets</u>: The Manage IT Assets dialog can be used to create and edit IT assets.

- <u>Import\_Schema</u>: Click the *Import Schema* button to import IT assets that have been saved in an external file to the database.
- <u>Export\_Schema</u>: Using the *Export Schema* button, you can save IT assets to an external file.



#### **Docusnap Connect**

- <u>Schedule Package</u>: Click the *Schedule Package* button to open the *Docusnap Connect* wizard. This wizard can be used to schedule a timed export of data.
- <u>Configuration</u>: Clicking the *Configuration* button opens a dialog for the configuration of tables for export.
- <u>Import Package</u>: Click the *Import Package* button to import packages that have been saved in an external file to the database.
- <u>Export\_Package</u>: Using the *Export Package* button, you can save previously created packages to an external file.



#### Settings

- <u>Designs</u>: Clicking this button opens a dialog where you can customize the design of reports, Visio maps, and IT concepts or create new designs.
- <u>Customize\_Company</u>: The basic settings for Docusnap can be specified in the Options and Designs and Styles dialogs. These settings can be modified individually for each company. This particularly affects the design of the documents to be created and the company logo. The available settings are explained in the Company Settings section.
- Active Directory: Clicking the Active Directory button will open the Manage Active Directory dialog. This dialog allows you to modify the scope of the ADS inventory process. For detailed explanations of this topic, refer to the Active Directory section.
- <u>Software Search</u>: Clicking the *Software Search* button opens the *Manage Software Search* dialog. From this dialog, you can define software that cannot be

scanned automatically due to a missing registry entry. To learn how the Software Search feature works, refer to the Software Search section.



#### SNMP:

<u>SNMP Mibs</u>: In the *Manage MIBs* dialog, you can manage your own or third-party MIBs.

<u>SNMP Types</u>: Click the *SNMP Types* button to open the *Manage SNMP Types* dialog. There, you can define additional types for SNMP devices.



Inventory:

NTFS Filter: 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.

<u>Server Roles</u>: During the server scanning process, all services that define the roles of the servers will be inventoried. The *Manage Roles* dialog allows you to define which service corresponds to which role. You can open this dialog by clicking the *Server Roles* option.

<u>System Groups</u>: In the *Manage System Groups* dialog, you can create system groups. Systems that have been scanned can be assigned to system groups to define logical groupings. For each group, specific maps can be generated.



Extensions: Extensions provide the ability to store comments, financial data, passwords, contracts and reminders for selected objects in the tree view. Each extension has a type that describe the associated extension. To open the dialog where you can add extension types, click the button for the desired type.

## Introduction



License Management:

<u>Software Category</u>: Software categories are used to group the software products for license management. Docusnap provides predefined categories.

<u>License Types</u>: Docusnap provides pre-defined license types. If additional types of licenses are needed, you can add and administer them from the *Manage License Types* dialog. Examples of licenses types include: OEM, volume licenses and package licenses.

<u>MaintenanceTypes</u>: In addition to the license contracts, the associated software maintenance agreements can also be defined. There are various types of software maintenance agreements. Clicking the *Maintenance Types* button will open the *Manage Maintenance Types* dialog.



#### 2.7.1.4 Advanced

The Advanced ribbon consists of five groups.

#### General

- <u>Search</u>: Using the integrated full-text search, you can search the entire database for specific terms. The search feature will be explained in more detail in the Search section.
- Compare Data: A click on the *Compare Data* button launches the data comparison wizard. For details on this topic, refer to the <u>Data Comparison</u> section.
- Execute: The *Execute* button will only be enabled if an object, for which actions specific to that object can be performed, has been selected in the tree view. If, for example, the Remote Desktop Connection from *Management Tools* has been stored with the object, a connection for a scanned computer can be established

directly by means of the Execute button.

🔍 Search
Compare Data
🕨 Execute 🔹 🔹
General

#### Data

- <u>Database\_Import</u>: 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.
- <u>Data Import (csv</u>): Click the Data Import (csv) button to launch the wizard for importing data from a CSV file.



## Tools

- <u>Management\_Tools</u>: Click the Management Tools button to set up external programs that can then be started from within Docusnap using the Execute button.
- Number Server: By means of the number server, you can define a sequential number that will be used when you create data entry screens.



## Other

- FaciPlan: FaciPlan is a facility management application. The equipment that has been inventoried can be managed from within Docusnap. FaciPlan can access this data and integrate it into building plans.
- ADS Synchronization: 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.

 <u>Snapshots</u>: 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.



### Users

The features in Docusnap can be enabled or disabled from the <u>Manage Users</u> dialog.

- Users:By clicking the *Users* button, you can assign domain users to the defined roles.
- Roles: Click this button to open a dialog where all buttons available in the user interface are listed for roles management. These buttons can then be enabled or disabled for the individual roles.
- Categories: You can use the <u>Categories</u> button to control access to extensions.
- Permissions: When you click the *Permissions* button, a dialog opens where you can define the <u>permissions</u> for the objects selected in the tree view.



#### 2.7.1.5 Tools

User-defined settings can be defined from the *Tools* ribbon. Detailed explanations of these dialogs are spread across several sections.

## General

- Options: The Options dialog can be opened by clicking the Options button. Program settings can be made from this dialog. The database selection and settings for wizards, additional tools, documentation, license management, the update feature and related to the Docusnap license are found in this dialog. For a detailed explanation of this dialog, refer to the <u>Options</u> section.
- Manage Reports: You can open the dialog for creating and deleting reports by clicking the *Manage Reports* button. The designer for editing the reports can be started by clicking the Designer button located in that dialog.

Information about the management, modification and creation of reports can be

found in the Administration Manual.



## **Extending Docusnap**

The buttons in the *Extending Docusnap* group will only be available if a license for the Customizing module has been purchased.

- Manage Tables: The tables in the Docusnap database can be edited and extended. Clicking the *Manage Tables* button will open a dialog for managing the meta tables.
- Manage Objects: Clicking the Manage Objects button will open a dialog for managing the meta objects. The tree view in the Data Explorer can be customized or extended from this dialog.
- Design Mode: This option is only available if a data entry screen has been opened in the main window. Clicking the *Design Mode* button will open the data entry screen in the Designer.
- Import Schema: When you click the Import Schema button, a file with modifications of the hierarchy and tables from another database can be imported into the current database.
- Export Schema: When you click the Export Schema button, the modifications made to the hierarchy and the tables will be saved to an external file.



#### Language

The language for the program will be determined from this group. 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.

English	-
Language	

#### 2.7.1.6 Help

From the *Help* ribbon, you can start the software update feature. In addition, the manual and other useful information can be accessed from there. This ribbon is subdivided into two groups:

#### General

- Update: Clicking the Update button starts the program update. More information about this can be found in the Update chapter.
- Merge Reports: If an update has added new or modified reports to the application directory, these can be copied to the report repository using the *Merge Reports* dialog. To update a report, tick the associated checkbox and confirm the merge action by clicking the *OK* button.
- 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.
- Changes: Click the *Changes* button to open a dialog that shows the change log, i.e. the changes and enhancements introduced with the last versions of Docusnap.
- Help: Click this button to display a menu that allows you to open the User Manual and the Configuration Manual as PDF files or access their online versions.



#### Support

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



#### 2.7.1.7 Permission Analysis

The Permission Analysis ribbon will be displayed when Permission Analysis has been selected from the Navigation pane. This ribbon is subdivided into four groups.

### General

- <u>NTFS\_Permissions</u>: Click the NTFS Permissions button to launch a wizard which helps you select the Windows systems for which to scan the permissions.
- <u>Online Analysis</u>: 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 (highlighted in orange).



#### Action

- Analysis: Click the Analysis button to open the <u>permission structure</u> for the currently selected user.
- Structure: Click the 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.



## **Effective Permissions 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 (Resource)* button, you can create a report which shows the effective permissions to the selected directory and its subdirectories.

Clicking the *Directory (Resource)* button creates a report which displays all users who have a permission to the selected directory and its subdirectories.

Clicking the *User (Exchange)* button creates a report on the effective permissions of the selected users to the Exchange mailboxes, mailbox folders, and public folders.

Clicking the *Overview (Exchange)* button creates a report which displays all users who have permissions to the mailboxes, mailbox folders, and public folders.



#### 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.



#### 2.7.1.8 License Management

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

#### Wizard

Clicking the *Create New License* button will start the <u>License Management Wizard</u>. The desired license can be created using this wizard.

There are two options for modifying an existing license. The data can either be edited using the wizard or using the editor from the main window. Clicking the *Edit License* button will open the *License Management* wizard with the data for the selected software product, which may then be edited.



#### General

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 <u>Data Explorer</u> hierarchy of the specific system.

Cached tables have been introduced to Docusnap 6.1 in order to avoid latency during license management. In general, the cache will automatically update itself. The cache can be built manually by clicking the *Refresh Software Cache* button.



### 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.



#### 2.7.1.9 Organization

The *Organization* ribbon will display once you have selected *Organization* from the Navigation pane. Organization provides the ability to view all extensions (contracts, financial data, etc.) in a flat structure and thus presents the information from an organizational perspective. This ribbon consists of two groups:

## General

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

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



#### New

The *Organization* ribbon provides the ability to add new extensions. In the *New* group, you can add comments, passwords, financial elements, contracts and reminders. The dialog for adding extensions will be explained in the <u>Organization</u> section.



#### 2.7.1.10 Reporting System

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

- Print: The displayed report can be printed by clicking the *Print* button.
- 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.
- 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 default email program opens so that you can send the report.

- 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.
- Save: Click the *Save* button to save the executed report as an *.mdc* file.



### Pages

- 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.
- Page Size: To open the dialog for the definition of the page size, click the Page Size button.



#### View

- 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.
- 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 be 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.



#### 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.



#### 2.7.1.11 IT Relations

The *IT Relations* ribbon displays when you select IT Relations in the Navigation pane. Using this ribbon, you can save and edit relations.

#### General

Click the *Export* button to export the current diagram to a Visio file. 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.

Parallel automatically		
Hierarchical direct	•	2
		-
Arrange		

## Adjust

• If the *Connect automatically* button has been enabled, a new component will

always be connected with the most recently selected component.

- The *Pointer Tool* allows you to select individual components by a mouse click.
- 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.
- Click the *Move* button to enable moving of the entire diagram.
- 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.

Connect automatically	🖑 Move
Pointer Tool	Fit to Page
Connector	Show Grid
Adjust	

### Connector

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



#### Manage

By clicking the buttons in the *Manage* group, you open <u>Management dialogs</u> for the displayed protocols, the connection types and the displayed fields.

- Protocols: With each connector, an entry screen allows you to select the protocol to be used for that connection. Clicking the *Protocols* button opens a dialog where you can manage and add protocols.
- Relation Types: You can map the connection between two components using a relation type. New relation types can be added from the management dialog.
- Display 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.



Page 52

#### 2.7.1.12 IT Concept

The IT Concepts ribbon displays when you have selected IT Concepts in the Navigation pane. Using this ribbon, you can edit and change concepts.



#### **IT Concepts**

- Export: Using the *Export* button, you can export your concept to Word, PDF, or other formats.
- Edit: A click on the *Edit* button launches the IT Concept Editor where you can edit the selected IT concept.
- Refresh: Use the *Refresh* button to update the IT concept. This reloads the data for data elements, reports, etc. and recreates the table of contents.
- Print: By clicking the *Print* button, you can print the selected IT concept.
- <u>Assign</u>: Clicking this button opens the *Assign IT Concepts* dialog which allows you to insert the desired concept into other tree views. It is also possible to add an *IT concept folder* to a node in one of the other trees.
- Keep Version: Since only a certain number of versions of a document can be stored, you can click this button to select and keep a certain version. This prevents the current document version from deletion.
- <u>Schedule as Job</u>: Clicking this button opens a wizard which allows you to schedule creation of an IT concept for a certain date and time.
- Templates: Clicking the *Templates* button opens the *Manage IT Concept Templates* dialog.
- Docusnap 6.0 Migration: If the database still holds Docusnap 6.0 concepts which have not been migrated to the new IT Concept format, you can start the migration by clicking the *Docusnap 6.0 Migration* button.

#### 2.7.1.13 IT Concept 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 IT concept. You can specify whether you would like to refresh the entire IT 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 IT concept.



## 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 IT concept.
- Find: The A button allows you to quickly find particular parts in the entire text quickly and easily.
- Replace: The <sup>la</sup> 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, <u>Styles</u> 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 IT concept.
- Spell Check: Click the *Spell Check* button to start the integrated spell checker.
- Validate: By clicking the Validate button, you can check the IT concept for validity. Any errors found will be displayed in the error list. An error is present if, e.g., an inserted relation 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 IT concept. Here, the title and author of the IT concepts may be changed. You can also enter an additional description. The properties also include additional information such as the date when the IT concept was last modified.



#### Insert

Use the Insert ribbon to insert different <u>elements</u> into your IT concept.

 Header and Footer: Use the Header or Footer button to open an additional tab where you can specify your header and footer settings.

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Empty Page	Page Break	Report	Мар	IT Relation	Data	Datasheet	Field	File	Table of Contents •	Table	Picture	Hyperlink	Variable	Text Box	Quick Parts ▼	Placeholder	Footer	Header	Page Number
				_											_				
Pa	des			D	ocument	ation				Add	itional Ele	mente			Tex	ct		Header an	d Footer

## **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 relation, 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 *relations,* you can click the *Refresh* button to load their current version.
- Delete: Click the *Delete* button to delete the selected element.



## **Table Tools**

Settings	Select Table ➡ Select Row ➡ Select Cell	Delete	Insert Above	Insert Below	Insert to the Left	Insert to the Right	Merge Cells Split Cells
	Table		Ro	ws and C	olumns		Merge

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

		#
Footer	Header	Page Number
		•
1	Header and	Footer

This ribbon allows yo 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.

Header from Top	1,00 🌲
+ Footer from Bottom	1,00 🌲
Position	1

#### 2.7.2 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.

```
😤 New 👻 🔚 Save 🗖 Delete 🖸 🗈 🕨
```

By clicking the structure, you can start a <u>Full-text Search</u>.

Once a node has been selected in the Data Explorer, you can click the <sup>1</sup> button to start a <u>Data comparison</u>.

In the Navigation pane, you can select one of the seven available categories (Data Explorer, IT Documentation, Permission Analysis, License Management, Organization, IT Relations, IT Concepts) for display. Depending on the category selected in the Navigation pane, the ribbon and the contents of the main window will be adjusted accordingly.



Data Explorer

**IT Documentation** 

Permissions Analysis

License Management

## Organization

**IT Relations** 

**IT Concepts** 

#### 2.7.2.1 Data Explorer

The *Data Explorer* displays data resulting from a <u>network inventory scan</u> 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 <u>data entry screen</u> for creating a new company appears. Once you have entered all required information, click the *Save* button above the Data Explorer to save it.

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Complete	NTFS	SNMP	P Segr	ment	t 🧃 Import		Hyper-V 闎 S	harePoint 🗱 SQL Server	· 😤 🛛	HCP Server				
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Mew 📄	Save 🔲 Delete 😫	U U D		Info	rmation Dat	а (6)	Comments (0)	Finance (0) Passw	vords (C	) Contracts	s (0) Reminders	(0)		
	cusnap Inc		- H	-	Name		Online	Domain		Туре	Description	Exclude from License Management	Virtualization Host	_
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	🖳 docusnap.intern			8	SBEXUUU1		Succeeded	docusnap.internal		Server		No		
	🦞 docusnap.interna	al		-	SLDC0001		Succeeded	docusnap.internal		DC		No		
	Workstations			1	SLSQ0001		Succeeded	docusnap.internal		Server		No		
	- B Linux			Ū	SLTS0001		Succeeded	docusnap.internal		Server		No		
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	IT Documentati	ion												
24	Permission Ana	lysis												
<u> </u>	License Manage	ement												
000	Organization													
	IT Relations													
٩	IT Concepts			1										
Inventor	v Status: 🕕 Inac	tive 🛛 🖪	Docuspa	n Se	nver: 🕦 starte	ed	Cache Uno	late 🕕 Inactive 🛛 🍕	Databa	use Connection	s + Licensed to	Docusnan AG		•

At the second level, the *Contacts* and *Network Environment* objects are located. Previously created *IT Concepts* will be listed at the level directly below the company.

If the Contacts node is selected, you can create a new contact entry by clicking the

New button.

All domains in the network environment that have already been inventoried or created will be listed under the *Network Environment* node. In addition, equipment that was entered manually at the company level will be displayed under the Other Inventory node. Concepts created for this company in the IT Concepts module are listed directly below the company node.

At the third level, any identified devices are listed under the *Workstations*, *Servers*, *Linux*, *Mac*, *SNMP Systems* and *Virtualization* nodes. At the next level, the inventory date of each scanned device is displayed.

Below the ADS node, you can see entries showing the ADS inventory date. Below the date, the nodes for various areas such as ADS Users, ADS Groups, ADS Logical Structure, ADS Sites, Subnets, Master Roles and the Global Catalog are displayed.

Under the Network Services node, you can find DHCP Servers and DNS Servers. Under the Application Servers node, the Exchange, IIS Servers, SharePoint Servers and SQL Servers nodes are listed. The next level features a listing of the detected equipment and below it, the scan date. The levels below the scan date contain information on the system.

Under the *Virtualization* node, you can find the VMware Infrastructure and the Hyper-V Server nodes. The level below shows the date of the scan. Below the date, you can find a listing of data identified by the scan.

Under the *IP Systems* node, you can see any equipment that was found during an *IP System* scan.

You can manually add any equipment that could not be scanned automatically under the *Systems* node. To do so, use the <u>data entry screen</u> which is displayed in the main window.

Reports are available at various levels (company, domain, etc.) You can find the reports associated to the current level under the Reports node.

#### 2.7.2.2 IT Documentation

When you navigate to IT Documentation in the Navigation pane, the Explorer shows any documents created in this module. Maps and datasheets are displayed in a hierarchical structure.

At the first level, all companies are displayed. Below each company node, you can find the overview maps and network maps that include multiple domains.

At the same level, the domains are listed. Below the domain level, further maps and summaries are displayed.

Datasheets can be found below the Workstations, Servers, Linux and Mac nodes. Below the VMware and Hyper-V nodes, you can find the associated maps. 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.



Page 62

#### 2.7.2.3 Permission Analysis

The *Permission Analysis* 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 Permission Analysis explorer also displays SharePoint and Exchange permissions for analysis.

For more information on this topic, refer to the <u>Permission Analysis</u> chapter.

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		Type: Basic Permissions	Inheritance
By Docushap inc	User Selection		
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B- # SLTS0001			~
B- SLDC0002	R DOCUENId management	✓	<b></b>
🕀 🌸 Workstations	R DOCUENid management		✓
🕀 🍈 SharePoint	R DOCUENId_shipping		~
🔄 🗒 Exchange	R DOCUENId_warehouse		✓
the second secon	1 Inherited Permissions		
To.docusnap.intern	R Administrators	· · · · · · · ·	✓
Data Explorer	R Creator Owner	· · · · · · · ·	~
	R Local System		✓
IT Documentation	👫 Users	· · · · · ·	✓
Permission Analysis	Share Permissions		
License Management	R Everyone		
Organization			
De IT Relations			
IT Concepts			
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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*.

#### 2.7.2.4 License Management

In the *License Management* 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.

Close				License I	Management				Docusnap	6.1		- 6 %
Inventory	Documentation Management Advance	ed Tools	Help	License N	lanagement							
	A Exclude Systems	Export De	finition									
Santa Na	Refresh Software Cache	🐑 Import De	finition									
License	License											
Wi	zard General	Definitio	n									
😤 New 🝷 🔓	Save 🗖 Delete 🔍 🖹 🕨	Information	Data	Editor	Comments (	(0) Finance (0)	Contracts (0)	Reminders (0	)			
🗈 🍚 All	<u>^</u>	General Op	erating	Range								•
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🖻 - 📙 M	ficrosoft Office	Publisher:		Micr	osoft Corporatio	n				Version:	14.x	
- P.	Microsoft Office Enterprise 2007	Classification	on:	🗆 U	Indesired Produ	uct				Software Category:	Device license	•
	Microsoft Office Professional Plus 2007 Microsoft Office Professional Plus 2010	Availability		B	y Terminalserv	er						
L T	- P Keywords											
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e e	- 🧟 Update Path											
	Reports											
	Microsoft Project Professional 2010 Microsoft Visio Professional 2010											
	Reports											
무무	Data Explorer											
<u> </u>	IT Documentation											
<b>P</b> '4	Permission Analysis											
	License Management											
	Organization											
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The company is shown at the top level. At the next level, the software groups are listed. Below this level, you can define *software groups* in order to group software, e.g. by publishers.

Below each *software group* node, you can find the software products defined in the wizard. A software product may, for example, represent an installed software program.

The level below the software product node contains the following objects:

- Keywords
- Licenses
- Found Software
- Expected Installations
- Actual Installations

- Wanted Installations
- Unwanted Installations
- Missing Installations
- Update Path
- Reports

Keywords may be either including or excluding keywords. You can use them to assign the software found on the computers to software products.

The license represents the license agreement which has been accepted with regard to the software. Multiple licenses might have been purchased for any given software application. For this reason, you can create multiple licenses for each software product. Licenses can be assigned to CPUs, CPU cores, devices or users. This assignment indicates on which device the software should be installed or which users may work with the software. If devices or users have been assigned, they will be displayed at the next level below the licenses.

Each application that has been found by the network scan and matches the keywords will be displayed under Found Software. Besides, the systems on which the software is installed will be listed below its node.

The *Expected Installations* node shows the systems assigned to the licenses. This assignment is only possible if you have selected, on the Category page, one of the following license types: Device license, Processor license or Processor core license. The Expected Installations node indicates the systems where software should have been installed.

Below the *Actual Installations* node, you can see all systems where the software was found during the network scan.

Under the *Wanted Installations* node, you can find all systems which have been assigned to the licenses and where the software is installed. If the license was not assigned to a software category of if User license was selected as the category, no systems will be displayed under the Wanted Installations node.

Under the *Unwanted Installations* node, Docusnap displays all systems which have not been assigned to a license, but where the software is installed. If no systems have been assigned, all systems where the software is installed will be shown under the *Unwanted Installations* node.

Under the *Missing Installations* node, you can find all systems which have been assigned to a license, but where the software is not installed.

Using the *update paths*, predecessor (downgrade) and successor (upgrade) products can be defined. You can find the Downgrade and Upgrade nodes below the Update Path node. Upgrade licenses are shown under Upgrade, downgrade licenses

under Downgrade.

From the License Management module, you can execute reports for products, groups and companies. All available reports are listed under the Reports node. To execute a report, click its name.

You can define a software product as "undesired". Any undesired software products are shown under the software group, just like the other software products. Additionally, these software products will also be listed under the *Undesired Products* node.

#### 2.7.2.5 Organization

When you navigate to the *Organization* module, the Explorer displays any extensions (contracts, finance details, etc.) using a flat structure.

These extensions (comments, finance details, passwords, contracts, reminders) may be added from the Data Explorer, or one of the Explorers found in the Permission Analysis, License Management or Organization modules. The Organization tree view displays all available comments, finance details, passwords, contracts and reminders both summarized by type form and subdivided by company. This gives you a clear overview of the extensions and you can evaluate the data in reports.

The Organization Explorer includes the additional *All* heading. At the level below the *All* node, you can find the extensions grouped by Comments, Finance, Passwords, Contracts and Reminders. At the next level, all extensions of the selected type will be displayed.

Under each company node, nodes for all extensions will be listed. At the next level, the extensions associated with the selected company will be listed.

In the Organization module, extensions cannot be edited in a data entry screen from the main window. To edit an object, highlight it in the tree view and then click the *Edit Selected* button in the *Organization* ribbon. To create a new extension, you can use the corresponding Add... buttons on the ribbon.

#### Page 67

# Introduction

🚯   Close	Organiza	tion		Docusnap 6.1			- 6 %
Inventory Documentation Management	Advanced Tools Help Organiza	tion					
Edit Selected Add Comment	dd Contract						
Delete Selected Add Password	dd Reminder						
Add Finance Detail							
Canada							
	Teferretive Data (11)						
Save  Delete  □ □	Information Data (11)						
🕒 😌 All 📩	Title	User Name	Password Type	System Name	URL	Vaild through	Description
E- Docusnap Inc	SQL Server - SMSQ0001	admin	User Password	SMSQ0001			
Err V Comments	Man_Intern Encryption		Wi-Fi Protected Access (WPA)	Wlan_Intern			
User Manual	WMLX0007 - Linux	root	User Password	WMLX0007			
User Manual	🖗 WMA0001 - Mac	admin	User Password	WMA0001			
Finance	Wan_Guest Encryption		Wi-Fi Protected Access (WPA)	Wlan_Guest			
🧼 Car	WMWS0113 Bios Password		BIOS Password	WMWS0113			
🧀 Lease Costs	WMWS001 Bios Password		BIOS Password	WMWS001			
🧼 Mobile Phone	😥 Docusnap Homepage	admin	User Password	www.docusnap.com			
🧼 Portable Air-Conditioner	E-Mail (user@docusnap.com)	user	BIOS Password				
Portable Navigation System	WMLX0001 - Linux	root	User Password	WMLX0001			
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#### 2.7.2.6 IT Relations

In the *IT Relations* module, the Explorer displays the companies at the first level. Relations will be created at the level directly below the companies. To create a new relation, click the *New* button above the tree view. You can then navigate to the *IT Relations* tab to create the desired diagram.



💊 Inventory Status: 🕕 Inactive | 🐵 Docusnap Server: 💿 stopped | 🧑 Cache Update 🕕 Inactive | 👰 Database Connections 🔺 Licensed to: Docusnap AG

#### 2.7.2.7 IT Concept

The *IT Concepts* Explorer shows the available concepts. A dedicated *IT Concepts* ribbon displays when you navigate to this module.

The companies are displayed at the top level. Below each company, any directories and documents you create will be displayed. To create a new document or directory, click the New button above the tree view.



#### 2.7.3 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
Extensions (comments, finances, passwords, contracts, reminders)
Documents
Permission Analysis
Permission Structure
Group Policies
Structure
IT Relations
IT Concepts

#### 2.7.3.1 Information

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

This tab contains specific Dashboards for the selected module. They help you to work with the various Docusnap modules and indicate best practices.

## Introduction



The structures of the individual Dashboards are not identical. The following Dashboard types are available:

## Introduction

The Introduction Dashboard includes two links. Clicking the O icon plays a video with help information, and clicking the O icon opens the associated help in text form.



## Dashboards for the Inventory Process

The NTFS Inventory, SharePoint Inventory, AD Inventory, Windows Inventory, Mac Inventory, Linux Inventory and Network Inventory Dashboards display the date of the last scan. The shorter the progress bar at the right side of the Dashboard is, the longer is the time that has passed since the last scan. What is more, by clicking the Dashboard, you can open the associated wizard.

These Dashboards also include a link to the associated video and to the help text.



# Create Documentation and Create License Dashboards

When you click the *Create Documentation* Dashboard, the wizard for creating the entire documentation will open. Clicking the *Create License* Dashboard will launch the License Management wizard. On these Dashboards too, you will find the links both to the help video and to the help text.



## Other Dashboards

The remaining Dashboards, such as *Create IT Concept, Create IT Relation* and *Create Organization*, help you to further process the data scanned and documented in Docusnap. From these Dashboards, you can play videos or open instructions that help you with using the software.



#### 2.7.3.2 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*.
# Introduction

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Complete		Windows Hac SNMP IP Seg			egment 🚮 Import			Mware yper-V	💐 IIS 🏐 SharePoin	Exchange t 💋 SQL Serve	Active Directory								
Network	Permissions	🔥 Linux	Ø Offlin	ie Sys	tems		<b>⊗</b> x	enCenter			DNS Server								
W	lizard		Syst	ems					Application Ser	ver	Network Services								
∰New 🕞	Save 🗖 Delete	🭳 🗈 🕨 🔹		Info	rmatio	n Data	(20)												
🖃 🛄 Doo	cusnap Inc		-		Name						Version	Publisher	Installation Date	License Key					
<u></u> <u></u> <u></u>	Contacts			a	Microso	ft.NET Fi	amewo	rk 4 Clien	t Profile		4.0.30319	Microsoft Corporation							
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		a	Microso	oft SQL Se	rver Bro	owser			10.50.1600.1	Microsoft Corporation	20.05.2011								

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.

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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.

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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 right border of the *Data* tab pane, you open the Docusnap filter. Using the filter pane, 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 <u>Filters</u> section.

#### Page 75

# Introduction

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### 2.7.3.3 Editor

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 extensions will only be displayed after you have saved the data entered in the editor.

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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.

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#### 2.7.3.4 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.

## Introduction



### 2.7.3.5 Extensions

Extensions can be used to store additional information about individual objects. Using extensions, you can create <u>comments</u>, <u>finance details</u>, <u>passwords</u>, <u>contracts</u> and <u>reminders</u>.

The tabs for entering comments, finance details, passwords, contracts or reminders will appear when you select the respective object in the Data Explorer. Alternatively, you can also add extensions from the Explorer of the <u>Organization</u> module.

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### 2.7.3.6 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 individually, 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 IT Documentation module 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. For detailed information on the IT Documentation module, click here.

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



### 2.7.3.7 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.

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### 2.7.3.8 Permission Structure

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.



### 2.7.3.9 Group Policies

In Docusnap 6.1, 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.



### 2.7.3.10 Structure

The Structure 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 *Structure* tab, the hierarchy of groups or users is built and shown in a diagram. The  $\mathfrak{R}$  icon indicates a group. Individual users are identified by the  $\mathfrak{K}$  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.



### 2.7.3.11 IT Relations

On the IT Relations tab, you can create diagrams that show the relations between different elements. The current Data Explorer 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 relations between individual objects in more detail.

# Introduction



## 2.7.3.12 IT 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.

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			5.3.4. Building Infrastructure	
			5.4. Alerting System in Case of an IT Emergency	
			5.4.1. Notification Plan	
			5.4.2. Automatic Notifications	5
			5.4.3. Notification of Ambulance and Emergency Services	
			5.4.4. Internal Notification according to Alerting Procedure	
			5.4.5. Notification Procedure	5
Data Explorer			5.4.6. Contact Details IT Emergency Team	5
IT Documentation		6. R	estoring Plans for Critical Components	5
P Permission Analysis			6.1. Restoring of Datacenter	5
License Management			6.2. Restoring of Active Directory	5
Organization			6.3. Restoring of Central Data Storage	
			6.4. Restoring of ERP	
TI Relations			6.5. Restoring of Communication	5
IT Concepts			6.6. Restoring of Critical Clients	
			NUM	100 % (

## **2.8** 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.

Inventory	<u>ل</u> ات 6.1
<ul> <li>Company Selection</li> <li>Authentication</li> <li>Windows Systems</li> <li>Active Directory</li> <li>SNMP Systems</li> <li>SNMP V3 Systems</li> <li>Exchange Server</li> <li>SharePoint</li> <li>SharePoint</li> <li>SQL Server</li> <li>Linux Systems</li> <li>Mac Systems</li> <li>VMware Infrastructure</li> <li>Hyper-V</li> <li>XanCenter</li> </ul>	Please select a company or create a new one: <ul> <li>Select Company</li> <li>Create new Company</li> </ul> Docusnap Inc <ul> <li>Navigation Bar</li> <li>Main Window</li> </ul>
<ul> <li>DHCP Server</li> <li>DNS Server</li> <li>Summary</li> <li>Status</li> <li>Report</li> </ul>	Status Bar Navigation Buttons



In order to be able to use various Docusnap features, the wizards can be extended to include additional steps. For example, if the Scheduling step in the <u>Options</u> dialog has been enabled, you will have to work on an additional step in the wizard. In this manual and in the help documentation, these optional steps will be identified by the word "Optional" in the heading (e.g. Optional: Scheduling).

### Navigation Pane

The Navigation pane on the left side of the dialog identifies the current step in the wizard by highlighting the associated button in orange. If the button for a certain step is enabled, you can also go directly to this step.

### Wizard Pane

The main pane 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 3
- Warning <sup>(1)</sup>/<sub>(2)</sub>
- Information ①

### 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.

After the inventory scan has completed, only the *Close* button will be available on the Report page.

### 2.8.1 Optional: Scheduling

By default, the *Scheduling* step is disabled in Docusnap. To enable this setting, select *Tools -> Options* and open the *Wizards* page. This makes the *Scheduling* step available in all wizards.

## Introduction



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

Inventory	<u>6</u> ، ها
Company Selection	Schedule Inventory
Authentication     Windows Systems     Active Directory     SNMP Systems	Common Settings           Name:         Complete Network Inventory           Type:         Recurring
<ul> <li>SNMP v3 Systems</li> <li>Exchange Server</li> <li>SharePoint</li> <li>IIS</li> </ul>	Frequency         Interval:       Weekly       Image: Colspan="2">Veekly         Recurring every:       1       Week(s) on:       Monday       Wednesday       Friday       Saturday         Tuesday       Tuesday       Thursday       Sunday
<ul> <li>SQL Server</li> <li>Linux Systems</li> <li>Mac Systems</li> </ul>	Frequency per day
VMware Infrastructure     Hyper-V     XenCenter     DHCP Server	Duration           Start Date:         01.02.2013 • +
DNS Server     Summary     Scheduling	Job Management Job Management Database Type: SQLServer Database: DSHelp_EN Senver edewen01
	Docusnap Server: WKNM0002 Status: started
	Back Einish Cancel

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 can be used to summarize the selected configuration.

### 2.8.2 Optional: Import

The *Import* step is only displayed in the *Complete Network* wizard if the *Import Saved Settings* checkbox has been enabled on the *Wizards* page of the <u>Options</u> 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 <u>Export</u> step. When you select the desired configuration file, all settings saved in this file will be applied. Only the authentication step must be repeated.

Inventory		Qe.	6.1
Import	Import Settings		
Company Selection			
N Authentication	Import Settings		
Windows Systems	File Name: C:\Docusnap\CompleteInventory.xml		
Active Directory			
SNMP Systems			
SNMP v3 Systems			
Exchange Server			
SharePoint			
🖣 iis			
🗊 SQL Server			
🚯 Linux Systems			
📕 Mac Systems			
VMware Infrastructure			
🔃 Hyper-V			
🐼 XenCenter			
DHCP Server			
A DNS Server			
Summary			
Export			
	Import successful	ext Ca	ancel

### 2.8.3 Optional: Export

The *Export* step is only displayed in the *Complete Network* wizard if the *Export Settings* checkbox has been enabled on the *Wizards* page of the <u>Options</u> 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 in the Options dialog. Then, you can click the  $\Box$  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.

Inventory		<i>Q</i> Q <sub>0</sub> 6
👤 Import	V Export Settings	
具 Company Selection		
Authentication	Export Settings	
🔊 Windows Systems	File Name: C:\Docusnap\CompleteInventory.xml	
Active Directory		
🔮 SNMP Systems		
🔮 SNMP v3 Systems		
Exchange Server		
SharePoint		
IIS		
👂 SQL Server		
🔉 Linux Systems		
Mac Systems		
VMware Infrastructure		
🛿 Hyper-V		
XenCenter		
DHCP Server		
DNS Server		
Summary		
Export		
Status		
Report		

## 2.9 Filtering

When you click the right border of the Data tab pane, the *Docusnap filter pane* appears. When you cursor over this border, it will turn *orange*. Click the border to show the filter pane. This filter can also be used for other lists, for example in some of the steps of a wizard.

	Docusi	1ap 6.1							- @ X
Excloint ØSQL	hange . Server	Act DH DH Netwo	tive Direct ICP Serve IS Server ork Servic	ory r					
ance (0)	Passwo	rds (0)	Contra	acts (0)	Remind	ers (0)			
Online		Do	omain			Туре	Description	Exclude from License Management	
Succeeded		do	cusnap.int	ernal		DC		No	
Succeeded		do	cusnap.int	ernal		Server		No	
Succeeded		do	cusnap.int	ernal		Server		No	
Succeeded		doo	cusnap.int	ernal		DC		No	
Succeeded		do	cusnap.int	ernal		Server		No	
Succeeded		do	cusnap.int	ernal		Server		No	
									▼
	how alv Filte	vays ( <b>r</b>	2						
Disable Filter									
E Apply Filter									
- F	lemove	Filter							
E	Other								

To make sure that the filter is always displayed in Docusnap (even after a program reboot), tick the *Show always* checkbox.

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.

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. Please note that the wildcards mentioned above cannot be combined with the filter options listed below.

	Example
>(greater than) or>= (greater than or equal to)	<b>&gt;Docu</b> would filter for entries sorted alphabetically after "Docu".
>(less than) or.>= (less than or equal to)	<b><docu< b=""> would filter for entries sorted alphabetically before "Docu".</docu<></b>
<>(not equal)	<>Docu would explicitly exclude the "Docu" entry when filtering.
=(equal)	<b>=Docu</b> would only show entries that match "Docu" exactly.

	>=Docu +	-	<b>•</b>
	Name	Version	Publisher
a	Docusnap 5	5.1.247.5	itelio GmbH
a	Microsoft.NET Framework 4 Client Profile	4.0.30319	Microsoft Corporation
a	Microsoft .NET Framework 4 Extended	4.0.30319	Microsoft Corporation
a	Microsoft Office Professional Plus 2010	14.0.4763.1000	Microsoft Corporation

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

In addition, you can click the *down arrow* to the right of each *text field* to open a list of filter criteria. The *combo box* will be populated with the content of the associated column. Docusnap uses the selected criteria and applies the filter using a regular expression. It is also possible to enter regular expressions directly into the *text field*. Do do so, enter *regex:* and then type your expression.

Please note that the selected data type may affect the way numbers are sorted. If you select the String data type, numbers will be sorted by numeric order (for example 1, 11, 14, 19, 2, 21, 29, 3, 31...) With the Integer data type, however, numbers will be sorted according to their numeric values (for example 1, 2, 3, 9, 11, 24, 29, 31...)

Info	ormation	Data (51)	IT Relations	Comments (0)	Finance	e (0)	Passwords (0)	Contracts (0)	Reminders (0)			
	regex:^(([	)ocusnap\ 5)	(Microsoft \ \.NE	T\Framework\2\.0	\\ Service\			•		•		-
	Name							Compare Opera	itors: > , < , < > , =			
a	Docusnap	5				Cł	naracter String				-	1
a	Docusnap	5										1
a	Microsoft	NET Framew	vork 2.0 Service	Pack 2			Docusnap 5			<b></b>		3
							Microsoft .NE	T Framework 2.0	Service Pack 2			
							Microsoft .NE	T Framework 3.0	Service Pack 2			
							Microsoft .NE	T Framework 3.5	SP1			
							Microsoft .NE	T Framework 4 C	lient Profile			
I 1							Microsoft .NE	T Framework 4 E	xtended			
							Microsoft Exc	change Server 20	10			
							Microsoft Filte	er Pack 2.0				
I 1							Microsoft Offi	ice 2003 Web Cor	mponents			
							Microsoft Offi	ce Professional P	9lus 2010	<b>T</b>		
								Apply Remov	Cancel ve Filter			

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 *Excel Export* button. After you have saved the file, it will be opened directly in Excel.

# Filtering the Data 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 Data Explorer or License Management 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  $\forall$  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, as well as RegEx expressions, 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 redisplays 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.



## 2.10 Search

To perform a full-text search in the database, you can use the *Search* button on the *Advanced* ribbon. 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.

Search Filter	¢	6.1
Existing Meta Objects		
Data Explorer	Remo	ve Filter
E- D Scompany		
B Q IT Environment		
- Domain		
Workstations		=
⊕ □ 💐 General ⊕ □ 💕 Roles		
Grudiar Peatures		
ter a soliware ter □ \$\$\$ Hotfixes		
⊕ □ 🤝 Volumes ⊕ □ 📜 Page File		
🕀 🗆 🥐 Partitions		
Printers		
		_
	Save	Cancel

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

Search: Microsoft Office	Archives Tilter Searched Data Sets: 3.521
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.).

🚳   Close						Docusnap 6.1					- # X
Inventory	Documentation Management	Advan	ced Tool	s Help							
Search	Database Import	Manao	ement Tools	E FaciPlan	Roles 🖨 Ca	tenories					
Compare	Data Database Evport	Numbe	r Server	ADS Synchroniz:	tion & Lleare R Pa	mieeione					
Evenute	The Data Import (on u)	) Numbe		Capachata		maarona					
Carrie	Data import(csv)	т.	-l-	College	Unan						
			iois	Other	Users				1.0		
Sew S	iave Delete	Sear	ch: Microso	it Ultice	• 🔍	Archives Y Filter		D-th		bearched L	Jata Sets: 7.316
- & C	ontacts		Name			Object		ram			
Ē-ωπ	Environment		Microsoft (	Office Professional Plus	2010:Update for Microsof.	Hotfixes		Docusnap AG/IT Environm	ent/docusna		
	docusnap.intern		Microsoft (	Office Visio 2010:Definit	ion update for Microsoft O	Hotfixes		Docusnap AG/IT Environm	ent/docusna		
- P	Workstations		Microsoft	Uffice Visio 2010: Micros	oft Visio 2010 Service Pa	Hottixes		Docusnap AG/IT Environm	ent/docusna		
	🖶 🍓 WMWS0032		Microsoft	Office Office 64-bit Com	conents 2010:Microsoft O	Notixes		Docusnap AG/IT Environm	ent/docusna		
			Microsoft	SharePoint Workspace /	uuli service	Services		Docusnap AG/IT Environm	enudocusna		
	E & General	1 ×	Microsoft	Office Groove Audit Sen	ice	Services		Docusnap AG/IT Environm	ent/docuena		
	- Coptional Features	1 a	Microsoft	Office Diagnostics Servi	ne	Services		Docusnan AG/IT Environm	ent/docusna		
	🕀 🔊 Software	1 o	Microsoft	SharePoint Workspace	Audit Service	Services		Docusnap AG/IT Environm	ent/docusna		
	👰 Microsoft Office Pr	1 o	Microsoft (	Office Diagnostics Servi	De	Services		Docusnap AG/IT Environm	ent/docusna		
	Microsoft Visual C		Microsoft (	Office Professional Plus	2010	Software		Docusnap AG/IT Environm	ent/docusna		
	Microsoft Visual C	1	Microsoft (	Office Professional Plus	2010	Software		Docusnap AG/IT Environm	ent/docusna		
	With the Williams		Microsoft (	Office Visio Professional	2007	Software		Docusnap AG/IT Environm	ent/docusna		
	Windows Internet E	a	Microsoft (	Office Enterprise 2007		Software		Docusnap AG/IT Environm	ent/docusna		
	🕀 💦 Hotfixes	a	Microsoft (	Office Visio Professiona	2007	Software		Docusnap AG/IT Environm	ent/docusna		
	🕀 🍧 Network	a	Microsoft (	Office Professional Plus	2010	Software	Software Docusnap AG/IT Environment/docusna.				
	🖻 🥜 Additional Tools		Microsoft (	Office Professional Plus	2010	Software		Docusnap AG/IT Environm	ent/docusna		-
	E- Volumes	Info	rmation D	ata (1) IT Relations			<u></u>				
	H- Partitions	Î 🗌	Name			Version	Publisher		Installation Dat	te	License Key
	🖽 🙀 Hardware		Microsoft O	ffice Professional Plus 2	010	14.0.4763.1000	Microsoft	Corporation			MDX44-P3KFB-8D86D-YHWKW-RMP
	🕀 🛷 Printers										
	🗈 🛫 Printer Ports										
	🕮 🫫 Network Printers										
	H- P Shares										
	the Services	-									
4	Line a cocarosera										
ęg	Data Explorer										
	IT Documentation										
2%	Permission Analysis										1
	License Management										
	Organization										
DB	IT Relations										
	IT Concepts										
											•
S Inventory	Status: 🕕 Inactive 🔰 🙈 Doci	usnap Se	erver: 💿 r	not configured	💁 Cache Update 🛛 🕕 Ir	active   🦃 Database (	Connections +	Licensed to: Docusn	ap AG		

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

Page 98

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.



# 3 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.

# **Manual Entries**

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.

## 3.1 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.

🚳   Close								Docusnap 6.1	
Inventory	Documentation	Managem	nent Advanced	Tools	Help				
Complete Network	NTFS Permissions	Windows SNMP Linux	<ul> <li>Mac</li> <li>IP Segment</li> <li>IP Offline Systems</li> </ul>	CIFS	napScript	VMware Hyper-V XenCenter	📬 IIS 🏐 SharePoint	提 Exchange 💋 SQL Server	Active Directory
Wizard			Systems				Application Serve	er	Network Services

# Inventorying the Network

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

## Windows Systems

Windows systems will be inventoried on the basis of the Active Directory.

## **SNMP** Systems

When you perform an inventory of your SNMP systems, Docusnap will find systems such as printers, routers, or switches.

## Linux Systems

Equipment where Linux is installed as the operating system can be discovered and scanned using the Linux inventory process.

# Mac Systems

All Mac systems can be determined using the Mac inventory process.

## **IP Segments**

An inventory of IP segments is an alternative to scanning Windows systems. Here, the inventory scan is not based on the Active Directory, but on a freely definable IP range.

# Offline Systems

If some systems were unreachable during a previous scan, they can be targeted for another scan at a later time by means of the Offline Systems inventory process.

# CIFS

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 <u>Permission Analysis</u>).

## **Exchange Server**

Use the Exchange Server wizard to inventory all your Exchange Servers.

## **SQL** Server

To inventory your SQL Servers, click the SQL Server button in the Inventory ribbon.

# VMware Infrastructure

By scanning the VMware infrastructure, you can obtain information about vCenter, ESX, and VMware Server.

## Hyper-V

Scanning the Hyper-V servers creates an inventory of the existing Hyper-V servers.

## Internet Information Service (IIS)

Use the *IIS* wizard to inventory the Internet Information Service Server.

## SharePoint

To perform an inventory of your SharePoint servers, server authentication is required. For this, you need to specify the following information: SharePoint name, user, and password.

## XenCenter

Use this wizard to inventory your XenCenter environment.

## Active Directory

Besides Active Directory information such as organizational units, users, or groups, you can scan permissions and group policies.

### **DHCP** Server

Use this wizard to inventory your DHCP servers.

### **DNS Server**

To scan your DNS servers, click the *Inventory* button in the *Network Services* group.

### 3.1.1 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.



### 3.1.1.1 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.

Page 1	106
--------	-----

Inventory		<b>S</b> O 6.1	
Company Selection	Please select a company or create a new one:	Select Company     Oreate new Company	
Windows Systems			-
Active Directory SNMP Systems	Docusnap Inc	•	
SNMP v3 Systems			
Exchange Server SharePoint			

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.

Inventory			<i>Ø</i> Ø <sub>0</sub> 6.
Company Selection	Please select a company or create a new one:	Select Company	Create new Company
Windows Systems	Sele	ct Company	
Active Directory SNMP Systems	Docusnap Inc		¥
SNMP v3 Systems	Create	new Company	
Exchange Server SharePoint	telio GmbH		Save
🖏 IIS 涉 SOL Server			<u>C</u> ancel

### 3.1.1.2 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 Data Explorer. 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 Data Explorer.

### Authentication

Authentication by specifying an *Active Directory* domain is required for the following wizards:

- Complete Network
- NTFS Permissions
- Windows
- Offline Systems
- Exchange Server

- Active Directory
- DHCP Server
- DNS Server
- Hyper-V
- SharePoint
- IIS (Internet Information Service)

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 *intern.local* is *INTERN*. Therefore, you would have to enter the following user name: *INTERN*\*<UserName>* 

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			<i>ĝ</i> @o 6.1
Company Selection  Authentication  Kindows Systems  Active Directory  SNMP Systems  SNMP v3 Systems  Exchange Server  CharaPoint	Please enter your l Domain: User Name: Password:	ogin information: Domain Login docusnap.internal docuen\administrator 	

## Selecting a Domain

A logical domain must be selected or created for the following wizards:

- SNMP
- Linux
- Mac

- IP Segment
- CIFS
- SQL Server
- VMware Infrastructure
- XenCenter

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					6.1
Company Selection	Please select a domain or create a new one:	Select Domain	Create new Domain		
Mac Systems		Select Domain			
🚯 / Summary	docusnap.internal			[	•

### 3.1.1.3 Summary Page

As the last step, before the actual inventory scan can be started, both the modules to be inventoried as well as detailed information about the individual modules will be listed on a summary page.

Click the *Start* button to initiate the inventory process. The *Status* page of the wizard opens.
Image: Company Selection       Summary         Image: Company Selection       Summary         Image: Company Selection       Image: Company Selection         Image: Company       Image: Company Selection	Inventory		6.1
Windows Systems         Image: Active Directory         Image: SNMP Systems         Image: SNMP         Image: SNMP Systems         Image: SNMP Systems         Image: SNMP         Im	Company Selection	Summary	
BNS Server       III SLTS0001 Windows Server 2008 R2 Enterprise         Summary       WBWS0128 Windows 7 Enterprise         Status       WLWS0088 Windows XP Professional	<ul> <li>Authentication</li> <li>Windows Systems</li> <li>Active Directory</li> <li>SNMP Systems</li> <li>SNMP v3 Systems</li> <li>Exchange Server</li> <li>SharePoint</li> <li>IIS</li> <li>SQL Server</li> <li>Active Systems</li> <li>Wace Systems</li> <li>VMware Infrastructure</li> <li>Hyper-V</li> <li>XenCenter</li> <li>DHCP Server</li> </ul>	Image: Selected for inventory         Image: SNMP         Image: SNMP	
Status     Status     GUND ID Security	<ul> <li>DNS Server</li> <li>Summary</li> </ul>	SLTS0001 Windows Server 2008 R2 Enterprise     WBW/S0128 Windows 7 Enterprise     Wild WS/0188 Windows 7 Enterprise	_
Report	<ul> <li>Status</li> <li>Report</li> </ul>		-

#### 3.1.1.4 Status

The Status page displays information about the status and progress of the current inventory scan. The Navigation pane is disabled while the system performs the inventory scan. So, if you need to abort this process, you can only click the Cancel button.

The actual progress for each step will be displayed using progress bars (see the screenshot below) and can take on various states:

- A green progress bar indicates that a task has been performed successfully.
- A yellow progress bar shows that some information could not be determined for the corresponding step.
- A red progress bar indicates that an error has occurred during the inventory scan.

After the inventory process has been completed, the wizard automatically takes you to the Report page where a summary is displayed.

Authentication				
Windows Systems	Name	Туре	Progress in %	Information
Active Directory	🗄 🛼 Preparation	Preparation		Completed
SNMP Systems	E Active Directory	Active Directory		Completed
	🖃 🂐 Windows	Windows		Executing Process: 73 %
SNMP v3 Systems	SBDC0002	Windows		Scanning CD rom drives
Exchange Server	SBEX0001	Windows		Scanning software information
SharePoint	SBPS0001	Windows		Scanned successfully
IIC	SLDC0001	Windows		Scanned successfully
	I SLSQ0001	Windows		Scanned successfully
SQL Server	I SLTS0001	Windows		Scanned successfully
Linux Systems	💐 WLWS0088	Windows		Scanned successfully
Mac Systems	WBW/S0128	Windows		Scanning software information
VMware Infrastructure				
Hyper-V				
XenCenter				
DHCP Server				
DNS Server				
0				
Summary				
Status				

### 3.1.1.5 Summary Page

As the last step of the *wizard*, a final report is displayed that shows information on the completed inventory scan. The structure of the view reflects each inventory process step that was performed successfully, caused errors or could not be completed. In addition, error messages and error cause details will be shown for the aborted and incomplete steps.

Inventory	_	-	_	Qo. (
Company Selection	Report			
Authentication				
Windows Systems	Name	Type	Information	
Active Directory			Required Time: 00:15:20	
	Active Directory		Completed	
SNMP Systems	Windows		Completed	
SNMP v3 Systems	SNMP		Completed	
Exchange Server	IP System		Completed	
CharaDaint	Topology		Completed	
ShareFoint	DHCP		Completed	
lis	DNS		Completed	
SQL Server	Hyper-V		Completed	
Linux Systems	XEN XEN		Completed	
Linux Systems	Exchange		Completed	
Mac Systems	Successful (29)			
VMware Infrastructure	Active Directory (1)			
Hyper-V	docusnap.internal	ADS	Scanned successfully	
N/ O	🗆 📥 Windows (7)			
XenCenter	SBDC0002	Windows	Scanned successfully	
DHCP Server	SBEX0001	Windows	Scanned successfully	
DNS Server	SBPS0001	Windows	Scanned successfully	
0	SLDC0001	Windows	Scanned successfully	
Summary	SLSQ0001	Windows	Scanned successfully	
Status	J SLTS0001	Windows	Scanned successfully	
Report	NBWS0128	Windows	Scanned successfully	
	SNMP (14)			
	▲ 100 100 100 040	CNIMD	et.n.	•
				<u>C</u> lose

#### 3.1.1.6 Optional: Naming Snapshots

As already described in the <u>Basics - Docusnap Wizards</u> section, Docusnap wizards can be extended as needed. To enable the *Name Snapshot* step, open the *Wizards* page of the *Options* 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 atuomatic deletion* checkbox, the data associated with the current snapshot will not be deleted when the maximum number of archive versions (specified in the <u>Options</u> 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.

Inventory		<i>ĝo</i> s 6.1
Company Selection	☑ Name Snapshot	
<ul> <li>Windows Systems</li> <li>Snapshot</li> </ul>	Snapshot Name: Windows Systems Invertory	
Summary	Exclude snapshot from automatic deletion	]

#### 3.1.2 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 Systems

When you click either the *Complete Network* or the *Windows* 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.

#### **IP Segments**

Click the *IP Segments* 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**

If any systems cannot be reached at the time of a Windows inventory scan, Docusnap will assign the *Offline* status to them. By clicking the *Offline Systems* button, you can perform another inventory scan for these systems.

#### 3.1.2.1 Windows Systems

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

Image: Company Selection       Inventory Windows Systems         Image: Company Selection       Image: Company Selection         Image: Company Selection       Select QU         Image: Selection	Inventory			-		-	<i>i</i> a a a a a a a a a a a a a a a a a a a
Windows Systems       Define Filter         Start Search at:       Select <u>U</u> Stagt Search         Systems Found       Systems Found         Image: Summary       Summary         Image: Summary       Select <u>U</u> Stagt Search         Image: Summary       Select <u>U</u> Stagt Search       Image: Select <u>U</u> Image: Summary       Summary       Select <u>U</u> Stagt Search       Image: Select <u>U</u> Image: Summary       Summary       Select <u>U</u> Stagt Search       Image: Select <u>Server</u> Image: Summary       Summary       Select <u>U</u> Stagt Search       Image: Select <u>Server</u> Image: Select <u>Select Server</u> Image: Select Select Select Server       Image: Select Server <u>Server</u> Image: Select Select Server <u>Select </u>	Company Selection	Inventory	Windows Systems	5			
Image: Start Search at:       Select OU	Windows Systems				Define Filter		
NameOperating SystemTypePassword AgeFilterImage: SBDC0002Windows Server 2012.Domain Controller28Image: SBDC001Image: Server 2008.Server13Image: SBDC001Windows Server 2008.Server16Image: Server 2008.Server 2008.Server 3Image: Server 2008.Server 3Image: Server 2008.Server 3Image: Server 2008.Server 3Image: Server 2008.Server 2008.Server 2008.Server 2008.Select 11Image: Select 31Image: Select 31<	<ul> <li>Snapshot</li> <li>Summary</li> </ul>	Start Sea	rch at:		Systems Found	Select <u>D</u> U Sta	a <u>r</u> t Search
Image: Second			Name	Operating System	Туре	Password Age	Filter
Image: Second state       Windows Server 2008.       Server       13       Image: Second state       13       Image: Second state       13       Image: Second state       16       Image: Second state       Image: Second state       16       Image: Second state       <			SBDC0002	Windows Server 2012	Domain Controller	28	Enable Filter
Image: SBPS001       Windows 2000 Server       Server       16         Image: SLDC001       Windows Server 2008       Domain Controller       3         Image: SLSQ001       Windows Server 2003       Server       3         Image: SLSQ001       Windows Server 2008       Server       3         Image: SLSQ001       Windows Server 2008       Server       24         Image: SLSQ001       Windows 7 Enterprise       Workstation       21         Image: SLSQ0088       Windows XP Professio.       Workstation       27         Image: SLSQ088       Windows XP Professio.       Workstation       27         Image: SLSQ088       Windows XP Professio.       Workstation       27         Image: SLSQ08       Windows XP Professio.       Workstation			SBEX0001	Windows Server 2008	Server	13	Analy Filter
Image: SLDC0001       Windows Server 2008.       Domain Controller       3         Image: SLSQ0001       Windows Server 2003       Server       3         Image: SLSQ0011       Windows Server 2008.       Server       24         Image: SLSQ0012       Windows 7 Enterprise       Workstation       21         Image: WBWS0128       Windows 7 Professio.       Workstation       27         Image: WLWS0088       Windows XP Profe			SBPS0001	Windows 2000 Server	Server	16	
Image: SLSQ0001       Windows Server 2003       Server       3       Select         Image: SLSQ001       Windows Server 2008.       Server       24       Image: Select all and a selec		<b>I</b>	SLDC0001	Windows Server 2008	Domain Controller	3	Remove Filter
Image: SLTS0001       Windows Server 2008.       Server       24       Image: SLTS001       Image: SLTS001 <td></td> <td></td> <td>SLSQ0001</td> <td>Windows Server 2003</td> <td>Server</td> <td>3</td> <td>Select</td>			SLSQ0001	Windows Server 2003	Server	3	Select
WBWS0128       Windows 7 Enterprise       Workstation       21         WLWS0088       Windows XP Professio.       Workstation       27         Image: Comparison of the profession of the profesion of the profession of the profession of			SLTS0001	Windows Server 2008	Server	24	Select all
WLWS0088 WIndows XP Professio Workstation 27		Z 🍬	WBWS0128	Windows 7 Enterprise	Workstation	21	Deselect all
			WLWS0088	Windows XP Professio	Workstation	27	Image: Control of the second secon

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 *Systems Found* 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.

In addition, a flyout pane will appear to the right of the list. There, you can filter, select and export the displayed systems (see: <u>Filters</u> section). While you can click one of the (domain controllers), (memberservers) and (workstations) icons to add or remove individual items, the *Select all* and *Deselect all* checkboxes allow you to select or deselect all systems with one click.



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.

#### 3.1.2.2 IP Segments

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

Domain		ory IP Segments			
Windows Systems			Add IP Ra	ange	
Summary		IP from	IP to		
		192.168.100.1	192.168.100.255		IP from: 192.168.100.1
					IP to: 192.168.100.255 🔀
					User: docuen\administrator
					Password:
		Sta <u>r</u> t Se	earch <u>C</u> ancel		N <u>e</u> w L <u>i</u> ear Sa <u>v</u> e
			Found Sys	tems	
		Host Name	IP Address	<b>A</b>	
	v 🦂	192.168.100.210	192.168.100.210		Host Name:
	v 🍂	SKNITIL01	192.168.100.155		
		SMAIL02	192.168.100.18		or IP:
	2 🍬		192 168 100 49		User:
		SREP01	102.100.100.40		
		SREP01 STAPI01	192.168.100.25		
		SREP01 STAPI01 WKNE0002	192.168.100.25 192.168.100.174		Password:
		SREP01           STAPI01           WKNE0002           WKNM0002	192.168.100.25 192.168.100.174 192.168.100.122		Password:
		SREP01 STAPI01 WKNE0002 WKNM0002	192.168.100.25 192.168.100.25 192.168.100.174 192.168.100.122		Password: 🔀

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.

### **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.



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.

#### 3.1.2.3 Offline Systems

To start the wizard for inventorying your offline systems, click the *Offline Systems* button on the Inventory ribbon. The *Offline Systems* step will be displayed after you have selected a company and entered your credentials (see: <u>Basic Steps</u>).

Company Selection	Inventory Offline Hosts			<b>Q</b> Q <sub>0</sub>
Authentication Offline Systems		Systems	Found	
Summary	Name	Туре	Domain	Filter
	SBEX0001	Offline	docusnap.internal	Enable Filter
	🗵 🕘 SLFS0001	Offline	docusnap.internal	Tio Apply Filter
	🗵 🕘 SLSQ0001	Offline	docusnap.internal	
	🕼 🔊 WBWS0128	Offline	docusnap.internal	Remove Filter
	🖉 🔊 WLWS0088	Offline	docusnap.internal	Select
	🖾 🛞 SLTS0001	Offline	docusnap.internal	Select all
	🕼 🔊 SBPS0001	Offline	docusnap.internal	🐼 Deselect all
				Other
				Excel Export
			Back	<u>N</u> ext Ca

Only Windows systems that could not be inventoried during previous inventory scans will be displayed in the *Systems Found* 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.

In addition, a flyout pane will appear to the right of the list. There, you can filter, select and export the displayed systems (see: <u>Filters</u> section). Using the *Select all* and *Deselect all* buttons, you can select or deselect all systems with one click.

#### 3.1.2.4 Optional: Software Search

As already described in the <u>Basics</u> - <u>Wizards</u> section, Docusnap wizards can be extended as needed. The *Software Search* step can be enabled from the Wizards page of the *Options* dialog.

The Software Search step is available in the following wizards:

- Complete Network
- Windows Systems
- Offline Systems
- IP Segments



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 *Manage Software Search* dialog by clicking the *Software Search* button on the <u>Management</u> ribbon.

Inventory			ĝas d	6.1
Scompany Selection	Apply Software Search			
Windows Systems	Name	Version		
Software Search	🗹 🦣 PuttY	0,62		
Summary				

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.

#### 3.1.2.5 Optional: Additional Tools

As already described in the <u>Basics</u> - <u>Wizards</u> section, Docusnap wizards can be extended as needed. The Additional Tools step can be enabled from the Wizards page of the Options dialog.

The Additional Tools step is available for the following wizards:

- Scan Network
- Windows Systems
- Offline Systems
- IP Segments



Utilities (additional tools) 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.

Inventory	-	-		<i>Q</i> @6.1
Company Selection	Apply Additional Tools			
🖉 Windows Systems	Tool	Description	Parameter	Timeout
Z Additional Tools	Systeminfo.exe	Systeminformation	/S %hostname% [/U %username% /P	10000
Summary				

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

Page 118

be executed in the course of the automated scan process.



Utilities will be executed on the system where the inventory process will be taking place. If, for example, *SystemInfo.Exe* has been integrated as a utility, it will be started on the computer on which Docusnap is running. The operating system configuration for a remote system to be scanned can be specified to *SystemInfo.Exe* by means of a parameter.

Before an *additional tool* can be used, it must be defined. This can be done from the *Additional Tools* page of the Options dialog.

#### 3.1.3 SNMP Systems

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

Inventory		<u> </u>
Company Selection Domain	Inventory SNMP Systems	
SNMP Systems		Add IP Range
SNMP v3 Systems	IP from: 192.168.100.1	IP to: 192.168.100.254 🔀 New Delete Save
(2)	Community: public	Timeout: 2500
		(IP Ranges )
	IP from	IP to Community Timeout
	92.168.100.1	192.168.100.254 public 2500

#### Scanning SNMP systems

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.

### 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	<b>B</b> Ø® <mark>6.1</mark>
Company Selection	Inventory SNMP v3 Systems
SNMP Systems	SNMP v3 Systems
SNMP v3 Systems	
Summary	Name
	AFWI10001 Delete Save Information
	Back Next Cancel

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.

SNMP v3 Inform	nation: AFWIT0001	6.1
USM User	docusnap	
Security Level	Auth_Priv	•
Auth Algorithm	MD5	•
Auth Password	*******	
Privacy Algorithm	DES	-
Privacy Password	*******	
Context Name		
Engine ID		
Localized Auth Key		
Localized Priv Key		
Timout in ms	260	
L	<u>S</u> ave <u>C</u> los	se

After the desired systems have been added to the *SNMP v3 Systems* table, 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 Wizards page of the <u>Options</u> dialog).

# Linux Systems

3.1.4

To start the wizard for inventorying Linux systems, click the *Complete Network* or *Linux* button on the Inventory ribbon. The *Linux Systems* step will be displayed after you have selected a company and a domain and entered your credentials (see: <u>Basic Steps</u>).

Inventory			<b>Q</b> Q <sub>0</sub> 6.
Company Selection	Inventory Linux Systems		
Linux Systems		Add IP Rang	e
Summary	IP from	IP to	
	172.31.2.0	172.31.2.255	IP from: 172.31.2.0
			IP to: 172.31.2.255
			User: administrator
			Password:
			Port: 22
	Sta <u>r</u> t S	earch <u>C</u> ancel	N <u>e</u> w C <u>l</u> ear Sa <u>v</u> e
		Found System	ns
	Host Name	IP Address	
	🗵 🐞 WMLX0007	172.31.2.10	Host Name:
			or IP:
			User:
			Password:
			Port: 22
			New Delete Save
			, ,

If you define an RSA key on the Wizards page of the <u>Options</u> dialog, you can, once an initial scan has been performed, omit the password for subsequent scans.

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.

# **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 SSH daemon must be running on the remote Linux system and port 22 must be open.

#### 3.1.5 Mac Systems

To start the wizard for inventorying Mac systems, click the *Complete Network* or *Mac* button on the Inventory ribbon. The *Mac Systems* step will be displayed after you have selected a company and a domain and entered your credentials (see: <u>Basic Steps</u>).

Inventory			<i>©</i> @。 6.1
Company Selection	Inventory Mac Systems		
Mac Systems		Add IP Range	<u>)</u>
Summary	IP from  IP 2.168.100.100	IP to 192.168.100.110	IP from: 192.168.100.100
			IP to: 192.168.100.110
			Password: ******* X
	Sta <u>r</u> t Sear	ch <u>C</u> ancel	N <u>e</u> w Clear Save
		Found System	la
	Host Name	IP Address 192.168.100.101	Host Name:
			or IP:
			Password:
			Port: 22
			New Delete Save
			Back Next Cancel

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.

# **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.

#### 3.1.6 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 and entered your credentials (see: <u>Basic Steps</u>).

Inventory	-		-	-		<i>ĝa</i> o <b>6</b> .1
Company Selection	Inventory CIFSS	Systems				
II CIFS		CIFS Systems				
Summary	Serv	ver	User	Password		
	172.	31.1.71	docuen\administrator			
	Host Name: 1 Community: p	72.31.1.71 ublic	User: do	ocuen \administrator	<u>N</u> ew <u>D</u> elete	<u>S</u> ave
					<u>B</u> ack <u>N</u> ext	Cancel

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 <u>Permission Analysis</u> 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.

#### 3.1.7 Exchange Server

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

For inventorying Exchange servers, you can select whether data on mailbox folders and the Exchange permissions should be retrieved as well.

					<i>©</i> ©₀ 6.1
Authentication	Inventory	Exchange Server			
			Settings		
Summary	Scan P	ermissions for Mailboxes	Counge		
	Scan W	allbox Folders			
	Scan P	ermissions for Public Folders			
	🗷 Scan S	pecial Permissions for Mailboxes		Sta <u>r</u> t	Search Import
			Found Systems		
		Name	Version	Import	Filter
		SCEX0001.rd.docusnap.intern	Version 8.3 (Build 30083.6)	Import	Enable Filter
	Z 🕌	SMEX0003.docusnap.intern	Version 14.0 (Build 30639.21)	Import	Apply Filter
	2	STEX0001.bulk.docusnap.intern	Version 14.0 (Build 30639.21)	Import	Remove Filter
					Select all
					🐼 Deselectall
					Other
					Excel Export
			·		
				Back	<u>N</u> ext Cancel

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.

### Import

Use the <u>DocusnapExchange.exe</u> script to retrieve information about the mailboxes, public folders, and permissions for a particular Exchange server and to collect them in a file. This data can be imported into Docusnap during the Exchange server inventory process.

Click the *Import* button to select the folder where these files are located. All folders are searched recursively and compared to the server data retrieved from the Active Directory. If matching files are found for the Exchange servers, these will be assigned accordingly. In the next step, the data for the respective servers will be imported and not retrieved by the inventory process.

Since you previously had clicked the *Start Search* button to list all existing servers, you can now select the systems for which you want to import the data from the server list.

### 3.1.8 VMware Infrastructure

To start the wizard for inventorying the VM ware infrastructure, click the *Complete Network* or *VM ware Infrastructure* button on the Inventory ribbon. The *VM ware Infrastructure* step will be displayed after you have selected a company and a domain and entered your credentials (see: <u>Basic Steps</u>).

Inventory		<i>Q</i> a <sub>0</sub> 6.1
Company Selection	Inventory VMware Infrastructure	
UMware Infrastructure	List of Servers	
Summary	Server User Password	
	C Svic03 docuen\administrator	
	Add VMware vCenter/ESX Server         vCenter/ESX Server:         svic03         User:         docuen\administrator         Password:	3 Save
	<u>B</u> ack	Next Cancel

Click the *New* button in the *Add VMware vCenter/ESX Server* group 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.

#### 3.1.9 Hyper-V

To start the wizard for inventorying Hyper-V servers, click the *Complete Network* or *Hyper-V* button. After you have selected select a company and a domain or entered your credentials (see: <u>Basic Steps</u>) the *Hyper-V* step is displayed.

Inventory		<i>Q</i> @ <sub>0</sub> 6.1
Company Selection	Inventory Hyper-V Server	
Hyper-V		
Summary	Name         Image: ShyperV02         Image: ShyperV02 <t< td=""><td></td></t<>	
	New Delete	xt Cancel

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. 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.

#### 3.1.10 Internet Information Service

To start the wizard for inventorying Internet Information Service (IIS) systems, click the *Complete Network* or *IIS* button. After you have selected select a company and a domain or entered your credentials (see: <u>Basic Steps</u>) the *IIS* step is displayed.

Inventory			<u>گری</u> 6.1
Company Selection	Inventory IIS Server		
💐 IIS		IIS Server	
Summary	Name	Security Info	
	smii0001.docusnap.intem	Global Credentials	
		Add IIS Server	
	IIS: smii0001.docusnap.intem	User: <u>h</u>	lew <u>D</u> elete <u>S</u> ave
		Fassworu.	
			<u>B</u> ack <u>N</u> ext Cancel

To inventory the desired IIS servers, click the *New* button and specify the name of the respective server. You can also enter alternative credentials. 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.

#### 3.1.11 SharePoint

To start the wizard for inventorying SharePoint servers, click the *Complete Network* or *Share Point* button. After you have selected select a company and a domain or entered your credentials (see: <u>Basic Steps</u>) the *SharePoint* step is displayed.

Inventory		<i>Q</i> @ <sub>0</sub> 6.1				
Company Selection	Inventory SharePoint Server					
SharePoint	SharePoint Server					
Summary	Name Security Info					
	smsp0001.docusnap.intern Special Credential					
	Global Credentials					
	Add SharePoint Server					
	SharePoint:     smsp0001.docusnap intem     User:     usnap\srv_moss_fam     New     Delete       Server Authentication     Password	<u>S</u> ave				
	☑ Limit Job History Number of Entries: 10					
	Back Net	xt Cancel				

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

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: <u>Permission Analysis</u>).

#### 3.1.12 SQL Server

To start the wizard for inventorying your SQL servers, click the Complete Network

or *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 Company Selection Domain	Inventory SQL Server		<mark>ل</mark> ات المراجع (6.1
SQL Server  Summary  Status  Report	The found servers don't have to	Search for SQL Servers )	Start Search Cancel
m neport	Server	Security Settings Information	Filter 🔺
	🛛 🕼 WKNE0010	Integrated Security	💎 Enable Filter
	SDEVSQL01	SQL Server Security	Image: Apply Filter       Image: Apply
	🗷 Scan Tables	Scan System Procedures	Scan Procedure Source Code
	Scan Columns	Scan Custom Procedures	
	SQL Server: WKNE0010	Number of Entries: Add SQL Server manually User: Password:	10 - New Delete Save
	Connection successful		

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. In the *Add SQL Server Manually* group, click the *New* button and specify the system to be scanned subsequently.

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.

Using the *Scan Tables* and *Scan Columns* checkboxes, you can specify the scope of the inventory scan. To determine the procedures to be scanned, you can use the *Scan Custom Procedures* and *Scan System Procedures* checkboxes. Using the *Scan Procedure Source Code* checkbox, 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 *Number of Entries* field.

#### 3.1.13 XenCenter

To start the wizard for inventorying Xen servers, click the *Complete Network* or *XenCenter* button on the Inventory ribbon. After you have selected select a company and a domain or entered your credentials (see: <u>Basic\_Steps</u>) the *XenCenter* step is displayed.

Inventory				_	<b>S</b>
Company Selection	Inventory	XenCenter			
XenCenter			(	List of Servers	
Summary		Server	User	Password	
		192.168.100.99	root		
	Xen Serv	er: 192.168.100.99	User: rr Password: •	Add Xen Server	New Delete Save
					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.

#### 3.1.14 Active Directory

To start the the wizard for inventorying the Active Directory service, either click the *Complete Network* 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: <u>Basic Steps</u>).

Inventory		<i>Q</i> @s 6.1
Company Selection	Inventory Active Directory	
Active Directory	General Options	
Summary	Start Search at:	Select OU
	Scan Permissions Scan Sites Scan Domain Structure	
	Group Policies	
	Scan Group Policies GPMC Host: SBDC0002.docusnap.internal	Check GPMC
	Active Directory Classes	
	Class Class Filter	
	User user	
	group group	
	Contact contact	
	Computer computer	
	Volume volume	
	InetOrgPerson     inetOrgPerson	
	I Foreign Security Principal foreign Security Principal	
	PaultinDomain builtindomain	
	GPMC check successful Back	Next Cancel

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. By enabling the *Scan Permissions* checkbox, you can specify to scan the permissions for an Active Directory object as well.

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.

#### 3.1.15 DHCP Server

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

Inventory		<i>Q</i> @s 6.1
Company Selection	Inventory DHCP Server	
DHCP Server	Search for DHCP Server	
Summary		Start Search
	DHCP Servers Found	
	Name	
	2 9 SBDC0002	
	SBDC0002	
	Add DHCP Server manually	Delete Save
	Back	Next Cancel

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 *DHCP Servers Found* 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 in the *Add DHCP Server Manually* group of the wizard to specify the system to be scanned subsequently.

#### 3.1.16 DNS Server

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

Inventory			<u>الم الم الم الم الم الم الم الم الم الم </u>
Company Selection	Inventory	INS Server	
B DNS Server		Search for DNS Serve	r]
Summary			Sta <u>r</u> t Search
		DNS Servers Found	)
		Name	
		SBDC0002 SLDC0001	
		5250001	
		Add DNS Server manua	illy]
			New Delete Save
			Back Next Cancel

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 *DNS Servers Found* list.

#### **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 in the *Add DNS Server Manually* group of the wizard to specify the system to be scanned subsequently.

# 3.2 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.

#### 3.2.1 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.

DocusnapS	Script				
DocusnapScript:					
Creates an XML file containing all information relevant to Docusnap 6.					
Call: DocusnapScript.exe [-H][-C <workstationname>][-D <domainname>] [-U <username>][-P <password>][-O <outputpath>] [-L <debuglevel>]</debuglevel></outputpath></password></username></domainname></workstationname>					
Parameters: It is possible to call DocusnapScript without parameters. In this case, all parameters are set to their default values.					
-Н	View this help. If this parameter is set, help information will be displayed by default.				
-c	Computer name (only for remote inventories). Default is the local computer.				
-U	User name (only for remote inventories). Default is "".				
-P	Password (only for remote inventories). Default is "".				
-D	Domain (only for remote inventories). Default is the local domain.				
-L	Log level. Valid values are {0, 1, 2}: 0 No logging 1 Error logging 2 Maximum logging Default is 0.				
-0	Path where the result file and the log file will be stored. Default is the DocusnapScript program directory.				
-A	Number of archived versions. Default is 4.				
(c) itelio	(c) itelio GmbH - DocusnapScript, version 6.				
	ОК				

### 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.



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 6\Tools>DocusnapScript -C WKNE0006 -D in 2 -0 C:\DocusnapScripts	ntern.local -L

This command will scan the **WKNE006** 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 <u>Software Search</u> 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--> </SoftwareItem>

<SoftwareItem> <SoftwareName>My New Software 1</SoftwareName> <SoftwarePublisher /> <!-- optional--> <SoftwareVersion /> <!-- optional--> <FileName>notepad.exe</FileName> <SearchPath>C:\Windows</SearchPath> <FileSize /> <!-- optional byte--> </SoftwareItem> Make sure to specify the filename correctly or use a wildcard character (?,\*).

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>



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.

#### 3.2.2 Import Scripts

Using the wizard for importing script files, you can import files that have been created by executing the DocusnapScript.exe.



Click the *Import* button on the Inventory ribbon to open the *Import Files* wizard. The *Directory Selection* step will be displayed after you have selected a company and a domain (see: <u>Basic Steps</u>).

To import xml files, two steps are necessary in the Docusnap Import Files wizard:

• In the *Directory Selection* step, define the location for storing the XML files.

Import Files	•	эФ;	6.1
Company Selection	Select Directory		
Jirectory Selection           File Selection           Summary	Add Directory Path: C:\DocusnapSortpt	Add	
	Select Directory		

• In the *File Selection* step, select the files to be imported.

Company Selection	Select Impor	tFile			
irectory Selection		Select File			
File Selection		File Name	Version	Date	
ummary	🗵 🍂	C:\DocusnapScript\WKNM0001_20130207153908.xml	6.10.0000	07.02.2013 15:39:08	
	🗵 🍂	C:\DocusnapScript\WKNM0002_20130207154220.xml	6.10.0000	07.02.2013 15:42:20	
	v 🍂	C:\DocusnapScript\WKNM0003_20130207154125.xml	6.10.0000	07.02.2013 15:41:25	
	V 🍂	C:\DocusnapScript\WKNM0005_20130207154143.xml	6.10.0000	07.02.2013 15:41:43	
	🗵 🍂	C:\DocusnapScript\WKNM0006_20130207154215.xml	6.10.0000	07.02.2013 15:42:15	

#### 3.2.3 Exchange

*DocusnapExchange.exe* provides three ways to inventory an Exchange server. Always run the script 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. When using the command line, you can additionally specify the number of threads to be used. 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:

Argument 1 = Retrieve permissions for mailboxes

Argument 2 = Scan mailbox folders

Argument 3 = Retrieve permissions for public folders

Argument 4 = Retrieve special permissions for mailboxes

Argument 5 = Number of threads

It is recommended to write the results to a file.



Legacy:

For the last option, you need to 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

Administrator: C:\Windows\system32\cmd.exe



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 during the **Exchange inventory** process.

### 3.3 Manual Entries

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.

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.

Close		Docusn	ap 6.1	x = -
Inventory Documentation Management	Advanced Tools Help			
Complete Network Wizard Wizard Wizard Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network Network	egment ] Import all Import terms 200	VMware VIIIS Exchange Hyper-V SharePoint Sal SqL Server XenCenter Application Server	Active Directory DHCP Server DNS Server Network Services	
	General New Tab Company Name: Street: Zp: State: Phone Number: Fax Number: Emal: Website: Customer Number: Description:	Cby:	- 10 - E = 1 + + + + + +	Vo.
L				

🚯 Inventory Status: 🕕 Inactive | 🚳 Docusnap Server: 🕐 started | 🥙 Cache Update 🕕 Inactive | 🛞 Database Connections + | Licensed to: Docusnap AG


# 4 Documentation

Data that has been determined by the network scan can be exported to files using the Documentation feature.

Using the ribbon of the same name, you can create maps of your network as well as of the Active Directory, etc. These maps can be opened in Visio.

📔 🐔 🖶 Print Docu	🗬 Network Maps 🛛 🛱 VMware 🛛 🕌 Exchange 🖉 DHCP Server	🗒 Create Datasheets
Create Create	🚱 Topology 🛛 🧃 Hyper-V 👘 SQL Server 📜 System Groups	Create Overviews
Docu Overview	Active Directory 🔕 XenCenter	
General	Maps	Documents

# 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.

# IT Documentation View

Docusnap has a specific IT Documentation module which allows you to manage the documentation you create.

# Printing Documentation

Datasheets and overviews can be printed using the Print Documentation wizard.

## 4.1 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 the interface language, it is possible to create documentation in German.

## **Folder Structure**

The folder where the documents will be saved must be selected when getting started with Docusnap. This path is specified on the Documentation page of the <u>Options</u> 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 contain 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 new IT Documentation module displays each generated map, overview or datasheet at its intended position in the IT Documentation explorer.

# Format Settings

The design of the documents and maps you create is influenced by two factors.

To format maps, go to the Documentation page of the <u>Options</u> dialog. Here, you can specify the font to be used in maps. The color is determined through the design selected in the *Designs* dialog.

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 *Designs* dialog. If you want to open and edit report in the Report Designer, go to the *Manage Reports* dialog.

The report names for datasheets start with "Datasheet", followed by "Linux", "Mac", "Server", "SNMP" or "Workstation" 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.

# 4.2 Creation of Documentation

By selecting the *Documentation* group on the ribbon, you can display the buttons required to document your IT environment.

	<b>1</b>	🚔 Print Docu	F Network Maps	🗗 VMware	Exchange	🕎 DHCP Server	🗒 Create Datasheets
Create Docu	Create Overview	🀌 Open Path	Topology	Hyper-V	🐌 SQL Server	👠 System Groups	Create Overviews
	Gener	al	-		Maps		Documents

# General

In this group, all basic wizard steps for creating documentation are available.

## Maps

You can create Visio maps of your network, Active Directory, Exchange servers, etc. Visio maps cannot be created using the Docusnap Server.

# **Documents**

The buttons in this group can be used to create datasheets and overviews.

### 4.2.1 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.



Summary

Status

Report

### 4.2.1.1 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 <u>Options</u> 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 Options dialog. If you want the documents to be created at a later time by using the Scheduler 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. 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 person as author in the document.

🛄 Company Selection	Company Selection					
👭 Domain Selection						
🗓 Network Maps			Select Company -			
🔝 Network Topology	Docuspan Inc.					•
Datasheets						
Active Directory		(	Ocumentation Path			
DHCP Server	Alternative Documentat	tion Path				
Exchange	C:\Documentation					
💋 SQL Server						
			[] ]			
VMware Infrastructure			Language			
VMware Infrastructure Hyper-V	Language: Evoligh		Language			
<ul> <li>VMware Infrastructure</li> <li>Hyper-V</li> <li>XenCenter</li> </ul>	Language: English	▼ Just HTML Doc	umentation			
VMware Infrastructure Hyper-V XenCenter Overviews	Language: English	Just HTML Doc	umentation			
VMware Infrastructure Hyper-V XenCenter Overviews Summary	Language: English	Just HTML Doc	Language umentation Author Information ]			
VMware Infrastructure Hyper-V XanCenter Overviews Summary Status	Language: English	Just HTML Doc	umentation			
<ul> <li>WMware Infrastructure</li> <li>Hyper-V</li> <li>XenCenter</li> <li>Overviews</li> <li>Summary</li> <li>Status</li> <li>Report</li> </ul>	Language: English	Just HTML Doc	tanguage }			•
<ul> <li>WMware Infrastructure</li> <li>Hyper-V</li> <li>XenCenter</li> <li>Overviews</li> <li>Summary</li> <li>Status</li> <li>Report</li> </ul>	Language: English	Just HTML Doct      Just in Documentation      First Name	Language	Position	Department	▼ Sex
<ul> <li>VMware Infrastructure</li> <li>Hyper-V</li> <li>XenCenter</li> <li>Overviews</li> <li>Summary</li> <li>Status</li> <li>Report</li> </ul>	Language: English	Just HTML Docretion	umentation Author Information)-	Position	Department	Sex male
<ul> <li>WMware Infrastructure</li> <li>Hyper-V</li> <li>XenCenter</li> <li>Overviews</li> <li>Summary</li> <li>Status</li> <li>Report</li> </ul>	Language: English	Just HTML Doc	unentation Author Information	Position	Department	v Sex male male
<ul> <li>VMware Infrastructure</li> <li>Hyper-V</li> <li>XenCenter</li> <li>Overviews</li> <li>Summary</li> <li>Status</li> <li>Report</li> </ul>	Language: English          Include Author Informat         Docusnap Inc         Last Name         Image: Clifton         Image: Dubin	Just HTML Docu	tanguage	Position	Department	Sex male
<ul> <li>WMware Infrastructure</li> <li>Hyper-V</li> <li>XenCenter</li> <li>Overviews</li> <li>Summary</li> <li>Status</li> <li>Report</li> </ul>	Language: English	Just HTML Doc  Just HTML Doc  First Name  Matthew Mack	umentation Author Information )	Position	Department	Sex male

### 4.2.1.2 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		6.1
Company Selection	Domain Selection	
Domain Selection		
L Network Maps	Select Domain	
Network Topology	Domain	Filter
Datasheets	U w bulk.docusnap.intern	Enable Filter
Active Directory	docusnap.intern	EA Apply Filter
DHCP Server	🕼 🔛 docusnap.internal	
🛃 Exchange	🗹 👥 rd.docusnap.intern	Remove Filter
💋 SQL Server	🕼 📓 IT Assets	Select
VMware Infrastructure		Select all
👔 Hyper-V		Deselect all
XenCenter		• Other
		🔀 Excel Export
<ul> <li>Summary</li> <li>Summary</li> </ul>		1
F Status		
Report		
		<u>B</u> ack <u>N</u> ext Cancel

### 4.2.1.3 Summary Page

The Summary page shows an overview of the settings you specified in the individual steps of the wizard.

Clicking the *Start* button launches the documentation creation.

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 *Start* 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.

Socumentation		
Company Selection	Summary	
Domain Selection		
Network Maps	Selected Modules	
Noticel Trademi	💐 Network Map	
Network I opology	S Routing Map	
Datasheets	STopology	
Active Directory	Datasheets	
DUCD Server	Active Directory	
DHCF Server	Active Directory Sites	
Exchange	Active Directory Domains	
SQL Server	The DHCP	
V/Mware Infrastructure	Exchange	
Documentation       Summary         I Company Selection       Summary         Domain Selection       Summary         Network Maps       Network Map         Network Topology       Selected Modules         Datasheets       Topology         Active Directory       Active Directory Sites         Exchange       Active Directory Sites         Soll. Server       DetCP         Hyper-V       Wware Infrastructure         Hyper-V       Wware Infrastructure         Wware Infrastructure       Wware Infrastructure         Overviews       Detaile         Summary       Satus         Report       Reduing Map         Market Infrastructure       Detaile         Ware Infrastructure       Detaile         Summary       Satus         Report       Detaile		
Hyper-V	Hyper-V	
XenCenter	XenCenter	
Overviews	J Overviews	
-	Details	
Summary	💐 Network Map	
Status	💐 Routing Map	
Documentation         Company Selection         Domain Selection         Network Maps         Network Topology         Datasheets         Active Directory         DHCP Server         Exchange         SQL Server         VMware Infrastructure         Hyper-V         Status         Status         Peport         Network Map         Network Map         Active Directory         Network Mape         Active Directory (Importantion)         DAtasheets         Active Directory Domains         QUHCP         Active Directory Domains         Verviews         Details         Network Map         Network Map         Network Map         Details         Routing Map         Pology         Network Map         Status         Peport         Image         Image         Image         Image         Image         Image         Image         Image         Image         Image     <		
rioport	Datasheets	
	Active Directory	
	Active Directory Sites	
	Active Directory Domains	
	🗉 🏪 DHCP	
	🗈 📙 Exchange	
	Wware Infrastructure	

### 4.2.1.4 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 Status				
Domain Selection					
Network Maps	Name	Туре	Progress in %	Information	
Network Topology	+ I Datasheets	Datasheets		Completed	
Datasheets	Overviews	Overviews		Completed	
Datasheets	🗆 🔃 Visio Maps	Visio Maps		Executing Process: 41 %	
Active Directory	Docusnap Inc: Network	M Visio Map		Waiting for other processes	
DHCP Server	Docusnap Inc: Routing N	M Visio Map		Created successfully	
Exchange	Docusnap Inc: Topology	Visio Map		Drawing objects (Step 51/89)	
	docusnap.intern: Active	Di Visio Map		Waiting for other processes	
SQL Server	docusnap.intern: Active	Di Visio Map		Waiting for other processes	
VMware Infrastructure	docusnap.internal: Activ	e Visio Map		Waiting for other processes	
Hvper-V	docusnap.internal: Activ	e Visio Map		Created successfully	
VC	docusnap.internal: Activ	e VisioMap		Created successfully	
AenCenter	🖞 docusnap.intern: DHCP	Visio Map		Created successfully	
Overviews	🛃 docusnap.intern: Exchar	nge VisioMap		Waiting for other processes	
Summary	🛃 docusnap.internal: Exch	a Visio Map		Waiting for other processes	
Statue	smesx02.docusnap.inte	m VisioMap	-	Waiting for other processes	
Status	docusnap.intern: Active	Di Visio Map		Waiting for other processes	
Report	🖞 docusnap.internal: DHC	P Visio Map		Created successfully	
	TEST_DS.docusnap.inte	er Visio Map		Waiting for other processes	
	SHYPER\/02 intern loca	A Martin Mara		Crosted augessafully	

# 4.2.1.5 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 been shown for the steps that caused errors. If you wish to open the document right after its creation, click the *Open Map* button in the ribbon.

Company Selection	Report			
Domain Selection				
Network Maps	Name	Type	Information	
Network Topology		1700	Required Time: 00:10:40	
network ropology	Datasheets		Completed	
Datasheets			Completed	
Active Directory	Usio Mans		Completed	
DHCP Server	Successful (75)			
Fundament	Datasheets (50)			
Exchange	Overviews (9)			
SQL Server	docusnap.intern: Computer list	Overviews	Created successfully	
VMware Infrastructure	& docusnap.intern: Group list	Overviews	Created successfully	
Hupper-V	docusnap.intern: Software list	Overviews	Created successfully	
Tiyper-v	👗 docusnap.intern: User list	Overviews	Created successfully	
XenCenter	k docusnap.internal: Computer list	Overviews	Created successfully	
Overviews	& docusnap.internal: Group list	Overviews	Created successfully	
Summany	docusnap.internal: Software list	Overviews	Created successfully	
	👗 docusnap.internal: User list	Overviews	Created successfully	
Status	💐 intern.local: Computer list	Overviews	Created successfully	
Report	Visio Maps (16)			
	💐 Docusnap Inc: Network Map	Visio Map	Created successfully	Open M
	💐 Docusnap Inc: Routing Map	Visio Map	Created successfully	Open M
	💐 Docusnap Inc: Topology Map	Visio Map	Created successfully	Open M
	docusnap.intern: Active Directory	Visio Map	Created successfully	Open M
	docusnap.intern: Active Directory D	Visio Map	Created successfully	Open M
	docusnap.intern: Active Directory Si	Visio Map	Created successfully	Open M
	Carl Stranger	10.0		يد سوه ا

#### 4.2.2 Map Files

The documentation you can create in Docusnap includes maps of the network, the Active Directory, the Exchange servers, etc.



To create these maps, Microsoft Visio must be installed. The maps cannot be created using the Docusnap Server.

Network Maps Topology Active Directory Exchange Server VMware Infrastructure Hyper-V SQL Server DHCP Server

# System Groups

### 4.2.2.1 Network Map

If you select multiple domains in the *Domain Selection* step, the system will create a network map which combines the selected domains in one single map. If you choose to create a routing map along with the network map, it will also include the values from all selected domains. This map 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)

Docusnap will not create individual maps for the domains, but only one single map which provides an overview of all selected domains. If you select only one domain, then the Visio file and the HTML file will be stored in the Maps folder for the corresponding 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 <u>Filters</u> 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 Options 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	_	_	_	ع 🖉
Company Selection	Create Network Map			
Network Mana	· · · · · · · · · · · · · · · · · · ·	Maps	]	
Summary	Create Network Map Prev	view		
	Create Routing Map	view		Advanced
		System	s	
	Name	Туре	Domain	Filter
	🕼 🕷 WBWS0128	Workstation	docusnap.internal	Enable Filter
	🗵 🍬 WMWS0032	Workstation	docusnap.intern	Apply Filter
	🗷 🌸 WMWS0064	Workstation	docusnap.intern	
	🗵 🌲 WMWS0113	Workstation	docusnap.intern	A Remove Filter
	🖾 🌸 WMWS0199	Workstation	docusnap.intern	Select
	🕼 🌸 WMWS0254	Workstation	docusnap.intern	Select all
	🕼 🌸 WMWS0333	Workstation	docusnap.intern	Deselect all
	🖾 濬 MMWS0610	Workstation	docusnap.intern	
	🖾 濬 MMWS0944	Workstation	docusnap.intern	
	🗷 🗿 SBEX0001	Server	docusnap.internal	📕 🎐 🚯 🕵
	🕼 🗿 SBPS0001	Server	docusnap.internal	
	🗵 🗿 SLSQ0001	Server	docusnap.internal	
	SLTS0001	Server	docusnap.internal	Excel Export
	SMEX0003	Server	docusnap.intern	
	SMI10001	Server	docusnap.intern	
	SMI10002	Server	docusnap.intern	-
			Back	<u>N</u> ext Cance

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, it is recommended to use the default settings. You can adjust both map types individually in the preview:

## 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

#### Page 157

#### Maps folder.

Network Map
Group Workstations
Include IP Systems
Group SNMP Systems
Group IT Assets
Ignore VMware Adapter

## Routing map

The routing map preview provides a checkbox that enables you to ignore the VMware adapters.

Routing Map
Ignore VMware Adapter

### 4.2.2.2 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 <u>SNMP systems</u> inventory scan. For virtual switches, you need to perform a <u>VMware Infrastructure</u> inventory scan.

If you enable the *Show Unknown Structures* checkbox, the ports of switches on which multiple MAC addresses have been learned will be displayed as a cloud.

Docusnap will generate additional maps for switches and virtual switches that have been selected in the *Systems* table. These maps will show the systems connected to the selected switch.

If multiple domains have been selected when creating the network topology map, it will be stored in the Maps folder below the company.

(\Documentation Path\Company\Maps\topology)

If only a single domain has been selected, the Visio and html files will be stored in the Maps folder of that domain.

(\Documentation Path\Company\Domain\Maps\topology)

Company Selection	Creat	e Network Topology Map			
Network Topology			Options		
Summary	Sho	w Unknown Structures			Preview
			Switch Maps	]	
		Name	Туре	Domain	Filter
	2	NetgearGS108T	SNMP	docusnap.intern	💎 Enable Filter
	2	NetgearGS108T(A0-21-B7-95-6F-80)	SNMP	docusnap.intern	Apply Filter
					Remove Filter
					Select
					Select all
					Deselectall
					Other
					Excel Export

### 4.2.2.3 Active Directory

The Active Directory Tree 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.

Company Selection		Astise Diseases Mar	_						
Iomain Selection	Create.	Active Directory Map	S						
active Directory				Act	tive Direc	tory Maps			
Summary		Domain	Filter	Preview	OU Map	o Overal	ll Map	GPO Map	
		docusnap.intern	Filter	Preview			[		
		docusnap.internal	Filter	Preview	1		[		
				Activ	e Director	y Site Maps			
		Domain	Preview	Show Replication	on s	Show Site Transport			
		docusnap.intern	Preview	×	[	Z			
		docusnap.internal	Preview	×	[				
				(		-			
				Active	Directory	Domain Maps			_
		Domain	Preview						
		docusnap.intern	Preview						
		docusnap.internal	Preview						

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.

Active Directory Structure
OU Map
Overall Map
O Group Policy Map
Active Directory Classes
Select All
🗵 BuiltInDomain
Computer
Contact
Foreign Security Principal
Group
Group Policy Container
InetOrgPerson
🗹 User
Volume

# 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.

Active Directory Sites	~
Show Replication	
Show Site Transport	

# 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 <u>Structure</u> 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 to a Visio map.



#### 4.2.2.4 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		6.1
Company Selection Domain Selection Exchange	Create Exchange Server Maps  Exchange Server Maps	
Summary	Domain     Preview       Image: Second	

#### 4.2.2.5 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	_	_	_	A.1
Company Selection	Create VMware Infrastructure N	Мар		
VMware Infrastructure		Sy	stems	
Summary	Name	Domain	Preview	
	☑ 🗐 smesx02	docusnap.intern	Preview	

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.

VMware	~
Overview	
Host to VM	
Host to Data Store	
Host to Network	
VM to Network	
VM to Data Store	

#### 4.2.2.6 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					6.1
Company Selection	Create Hyper-\	/ Map			
Hyper-V			Systems		
Summary	Name	Domain	Preview		
	SHYPE	ERV02 intern.local	Preview		
				<u>B</u> ack	<u>N</u> ext Cancel

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.



### 4.2.2.7 SQL Server

The SQL Server map contains all databases that are located on an SQL server. If you enable the *Include System Databases* checkbox, the system tables from the database will also be shown in the map. Databases to excluded from the map can be disabled in the list.

The Visio file and the HTML file will be stored in the Maps folder.

Domain Selection  SQL Server  Summary	Display System Databases     Domain		Server Maps	
	Domain			
	🛛 🌮 docusnap.internal	Preview		
-	Display Only Key Columns	SQL Serve	er - ER Diagrams	Chau shows a
	sdevsql01\dssql2012	docusnap Docusnap_BEP_MCB_Me	Preview Preview	Filter
		Docusnap_DatasheetTest Docusnap_Demo Docusnap_DocusnapAG	Preview Preview Preview	Apply Filter
	sdevsql01/dssql2012     sdevsql01/dssql2012     sdevsql01/dssql2012     sdevsql01/dssql2012     sdevsql01/dssql2012	Docusnap_Uocusnap_to Docusnap_ge Docusnap_KV Docusnap_Mad	Preview Preview Preview	Select all     Deselect all
	sdevsql01\dssql2012 sdevsql01\dssql2012	Docusnap_Mu Docusnap_Muh	Preview	

# (\Documentation Path\Company\Domain\Maps)

### 4.2.2.8 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		6.1
Company Selection	Create DHCP Server Maps	
DHCP Server	(DHCP Server)	
Summary	Domain     Preview       Image: Constraint of the state of th	

#### 4.2.2.9 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		-	-		6.1
Company Selection	Create	e Xen Infrastructure Map			
S XenCenter			Windows S	Systems	
Summary		Name	Domain	Preview	
		TEST_DS	docusnap.internal	Preview	

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.

#### 4.2.2.10 Overview Map

To create overview maps, either use the *Create Docu* wizard or the *Create Overviews* 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.



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	6.1	
<ul> <li>Overview Map</li> <li>Summary</li> </ul>	Options         Only Include Generated Documents         Alternative Documentation Path	_
	English  English  Selection  Selection  end  get  docusnap intern  end  get  docusnap intern  end  get  docusnap intern  end  get  docusnap intern  end  get  intern.local	

(\Documentation Path\Company\Maps\overview)

### 4.2.2.11 System Groups

In Docusnap, it is possible to define <u>system\_groups</u>. 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.

Documentation		6.1
Company Selection	Domain Selection	
Network Maps	Select Domain	
<ul> <li>Datasheets</li> <li>Summary</li> </ul>	System Groups	
	Group Name           Image: Contract of the second s	

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 <u>Filters</u> 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 can be created 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 <u>Options</u> 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 <u>Network Map</u>.

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* 

Company Selection	Create Network Map			
Network Mane		Maps		
Datashests	Create Network Man Pr	review		
Datasneets		ic nom		
Summary	Create Routing Map Pr	review		Advanced
		Systems		
	Name	Туре	Domain	Filter
	🖾 🕷 WBWS0128	Workstation	docusnap.internal	💎 Enable Filter
	🗵 🗿 SBEX0001	Server	docusnap.internal	S Apply Filter
	SBPS0001	Server	docusnap.internal	
	🕼 🦉 SLTS0001	Server	docusnap.internal	Remove Filter
	🖾 👔 SBDC0002	DC	docusnap.internal	Select
	🗵 🦉 SLDC0001	DC	docusnap.internal	Select all
	KVMONTHENET	SNMP	docusnap.internal	Deselect all
	MAFBPL01	SNMP	docusnap.internal	i in 1 in 1
	SXEN01	Linux Workstation	docusnap.internal	
				N 🥰 🚺 🕰
				Other
				Excel Export
				Exect Export

Network Map and/or Create Routing Map checkbox.

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 page on the <u>Options</u> dialog. 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				6.1			
Company Selection	Create Datasheets for Servers, Work	stations, SNMP, Linux and Mac System	ms				
Network Maps	(Settings)						
Datasheets	Show Comments	Show Results from Additio	nal Tools	Advanced 👻			
		Systems					
	Name	Туре	Domain	Filter			
	KVMONTHENET	SNMP	docusnap.internal	💎 Enable Filter			
	PMAFBPL01	SNMP	docusnap.internal	Apply Filter			
	🗵 i SBDC0002	DC	docusnap.internal				
	🗵 🗿 SBEX0001	Server	docusnap.internal	Remove Fliter			
	SBPS0001	Server	docusnap.internal	Select			
	🗵 🧵 SLDC0001	DC	docusnap.internal	Select all			
	SLTS0001	Server	docusnap.internal	Deselect all			
	SXEN01	Linux Workstation	docusnap.internal				
	🕼 🍂 WBWS0128	Workstation	docusnap.internal				
				💐   🃭			
				Other			
				Excel Export			
			Back	Next Cancel			

### 4.2.3 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 and 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 on the <u>Options</u> dialog. 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. For a detailed description, click <u>here</u>.

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.

ompany Selection	Create Datasheets for Servers, Works	tations, SNMP, Linux and Mac	Systems				
atasheets	Settings						
Summary	Show Comments Export Attachments	Show Results from A	Additional Tools	Advanced			
		Syst	ems				
	Name	Туре	Domain	Filter			
	192.168.100.249	SNMP	docusnap.internal	Enable Filte	ar -		
	🖾 🖶 CLJ4730DG	SNMP	docusnap.internal	Ed. Apply Filter			
	🖾 🖶 CLJ4730EG	SNMP	docusnap.internal				
	🖾 🖶 CLJ4730OG	SNMP	docusnap.internal	Remove Filt	er		
	🛛 🖶 CLJ4730UG	SNMP	docusnap.internal	Select			
	🕼 鹶 fwit001	SNMP	docusnap.internal	Select all			
	🖾 🗬 fwit002	SNMP	docusnap.internal	Deselect all			
	P2015Verwaltung	SNMP	docusnap.internal				
	PMAFBPL01	SNMP	docusnap.internal		5		
	Print Server dlink-0820C8	SNMP	docusnap.internal	- 1 🤒 ҧ	4		
	Print Server dlink-6E8C7A	SNMP	docusnap.internal		4		
	☑ 引 SBDC0002	DC	docusnap.internal				
	SBEX0001	Server	docusnap.internal	Excel Expor	,t		
	SBPS0001	Server	docusnap.internal				
	SFILE01	SNMP	docusnap.internal				
	SLDC0001	DC	docusnap.internal				

(\Documentation Path\Company\Domain\Datasheets)

### 4.2.4 Overviews

Overviews can be created using either the *Create Docu* wizard or the *Create 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	6.1
Documentation	Image: Contract of the second sec
	General Print Preparation Back Next Cancel

(\Documentation Path\Company\Domain\Overview)

# 4.3 IT Documentation

The new IT Documentation module 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.



# 4.4 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 in the Options dialog is already set.

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.

File Selection	Select directories, which are searched for printable files			
		Add new Directory		
	Recursively Search Subdirectories	Depth:	 1 <b>≑</b>	Add
		Directories to be Searched		
	Directory		Levels	<u>D</u> elete
	C:\Documentation		6	

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.

le Selection	
	Select Files to print
	File Path
	C:\Documentation\Docusnap Inc\docusnap.intern\Datasheets\Linux\smesx02\smesx02_en.mdc
	C:\Documentation\Docusnap Inc\docusnap.intern\Datasheets\Macintosh\test\test_en.mdc
	C:\Documentation\Docusnap Inc\docusnap.intern\Datasheets\Servers\smdc0001\smdc0001_en.mdc
	C:\Documentation\Docusnap.intern\Datasheets\Servers\smdc0002\smdc0002_en.mdc
	C:\Documentation\Docusnap.intern\Datasheets\Servers\smdc0003\smdc0003_en.mdc
	C:\Documentation\Docusnap.intern\Datasheets\Servers\smdc0004\smdc0004_en.mdc
	C:\Documentation\Docusnap.intern\Datasheets\Servers\smex0003\smex0003_en.mdc
	C:\Documentation\Docusnap Inc\docusnap.intern\Datasheets\Servers\smii0001\smii0001_en.mdc
	C:\Documentation\Docusnap.intern\Datasheets\Servers\smii0002\smii0002_en.mdc
	C:\Documentation\Docusnap.intern\Datasheets\Servers\smps0001\smps0001_en.mdc
	C:\Documentation\Docusnap.intern\Datasheets\Servers\smra0001\smra0001_en.mdc
	C:\Documentation\Docusnap Inc\docusnap.intern\Datasheets\Servers\smsp0001\smsp0001_en.mdc
	C:\Documentation\Docusnap.intern\Datasheets\Servers\smsp0002\smsp0002_en.mdc
	C:\Documentation\Docusnap.intern\Datasheets\Servers\smsq0001\smsq0001_en.mdc
	C:\Documentation\Docusnap.intern\Datasheets\SNMPInetgeargs108t(a0-21-b7-95-6f-80)\netgeargs108t(a0
	C:\Documentation\Docusnap Inc\docusnap.intern\Datasheets\SNMP\netgeargs108t\netgeargs108t_en.mdc
	C:\Documentation\Docusnap Inc\docusnap.intern\Datasheets\SNMP\pmafbpl01\pmafbpl01_en.mdc
	🕼 🛅 C:\Documentation\Docusnap Inc\docusnap.intern\Datasheets\SNMP\print server dlink-0820c8\print server dlink-0820c8_en.
	🛛 🛅 C:\Documentation\Docusnap Inc\docusnap.intern\Datasheets\SNMP\print server dlink-6e8c7a\printserver dlink-6e8c7a.en.

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.

gs Print Status				
Name	Туре	Progress in %	Information	
🗆 🖶 Print	Print		Executing Process: 85 %	
C:\D	ocumentation\Docusmdc		Completed successfully	
C:\D	ocumentation\Docusmdc		Completed successfully	
C:\D	ocumentation\Docusmdc		Completed successfully	
C:\D	ocumentation\Docusmdc		Completed successfully	
C:\D	ocumentation\Docusmdc		Completed successfully	
C:\E	ocumentation\Docusmdc		Completed successfully	
C:\D	ocumentation\Docusmdc		Completed successfully	
C:\D	ocumentation\Docusmdc		Completed successfully	
C:\D	ocumentation\Docusmdc		Completed successfully	
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C:\D	ocumentation\Docusmdc		Completed successfully	
C:\D	ocumentation\Docusmdc		Completed successfully	
C:\D	ocumentation\Docusmdc		Completed successfully	
C:\D	ocumentation\Docusmdc		Completed successfully	
C:\D	ocumentation\Docusmdc		Completed successfully	

Finally, the Summary page appears to display additional information about the printing process.

rint Documentatio	n	<mark>ه (</mark> کری
Print Settings File Selection	Report	
Status	Name Type	Information
Report	Summary     Print     ⊙ Successful (27)	Required Time: 00:01:10 Completed
	C:Documentation\DocusnapInc\docus	Completed successfully Completed successfully Completed successfully
	C:Documentation/Docusnap Inc/docus	Completed successfully Completed successfully Completed successfully
	C:\Documentation\Docusnap Inc\docus mdc C:\Documentation\Docusnap Inc\docus mdc C:\Documentation\Docusnap Inc\docus mdc	Completed successfully Completed successfully Completed successfully
	C:Documentation/Docusnap Inc/docusindc C:Documentation/Docusnap Inc/docusmdc C:Documentation/Docusnap Inc/docusmdc	Completed successfully Completed successfully Completed successfully
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	C:UocumentationUocusnap inclocus	Completed successfully



# 5 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 6.1 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 *Permission Analysis* 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.

## 5.1 Structure

The Permission Analysis module has been subdivided into several panes so that a maximum of information can be displayed.

🐣   Close	Permission Analysis		Docusnap 6.1				- # X
Inventory Documentation Management           Inventory         Documentation         Management           Image: Structure Control of Control	Advanced Tools Help Permission Analysis Carrent User Directory Filter Path Filter Path	Usar Overview (Exchange) (Exchange) eions Reports	e 8 8	Effect	tive Pe Repo	rmissions orts	
PNew Save XDelete Q D	Information Data Permission Analysis						
Docusnap Inc     Docusnap Inc     Docusnap intern     Docusnap intern     Docusnap intern     Docusnap internal     Docusnap internal	Search & d_logistic (DOCUEN\d_logistic)	(User Selection)	Тур	e: Basic	Permissions	Inherit	ance Salud Lijes
	Remove 🗹 Select all 🗌 Deselect all 🃑 Analys	sis 📩 Structure	User Sel	Peny Full Access Modfly	Read and Exe List Folder Co Read	Write This Folder Only Subfolders and Files On Subfolders Only Files Only	This Folder and Faes This Folder and Faes
Grand Comment	Enclose Hermissions     Abigail Knight     & Abigail Knight     & Charlotte L Sanders      & & & & & & & & & & & & & & & & &		Analysis, S	Structur	re / / / /		
	COULENICharlotte L. Sanders     DOCUENICharlotte L. Sanders     Systems. Directories	Effective Permission		✓ · · · · · · · · · · · · · · · · · · ·			<b>&gt; &gt; &gt; &gt; &gt; &gt; &gt; &gt; &gt; &gt;</b>
B→ SLDC0001 B→ Workstations ⊕ SharePoint ⊕ Exchange ⊕ I torn.local	DOCUENId_management     DOCUENId_management     DOCUENId_shipping     DOCUENId_warehouse     Indexined Permissions	Explicit Perm	issions ~	· · · · · · · · · · · · · · · · · · ·	<pre>&gt; &lt; &gt; &lt; &lt;</pre>	* *	> > > > > > > > > > > > > > > > > > >
B- I d.docusnap.intern Data Explorer IT Documentation	R Administrators       R Creator Owner       R Local System       R Users	Inherited Permissions	× × × ×		<pre>&gt; &lt; &gt; </pre> > < <  > < <  > < <	×	>
Permission Analysis     License Management     Organization	Share Permissions	Chara Demuisians	~	~ ~ .	~ ~ ~	×	
IT Relations		Share Permissions					
Suprementary Status: III Inactive Status	nan Server: 💿 stonned 🔰 🧟 Cache Undate 🚽	Inactive ADDatabase Connections + Licensed	to: Docusnan A	G			

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 *Permission Analysis* ribbon.

By clicking the *Analysis* button, you open the permission structure for the currently selected user or the currently selected group. The permission structure reveals how the user or group obtained their permissions.

Click the *Structure* button to display a diagram showing the nesting of users or groups for the selected user/group.

# 5.2 Menu Ribbon

The Permission Analysis ribbon will be displayed when Permission Analysis has been selected from the Navigation pane. This ribbon is subdivided into four groups.

## General

- <u>NTFS\_Permissions</u>: Click the NTFS Permissions button to launch a wizard which helps you select the Windows systems for which to scan the permissions.
- <u>Online Analysis</u>: 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 (highlighted in orange).



# Action

- Analysis: Click the Analysis button to open the <u>permission structure</u> for the currently selected user.
- Structure: Click the *Structure* button to display the <u>group or user nestings</u> 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.



## **Effective Permissions 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 (Resource)* button, you can create a report which shows the effective permissions to the selected directory and its subdirectories.

Clicking the *Directory (Resource)* button creates a report which displays all users who have a permission to the selected directory and its subdirectories.

Clicking the *User (Exchange)* button creates a report on the effective permissions of the selected users to the Exchange mailboxes, mailbox folders, and public folders.

Clicking the *Overview (Exchange)* button creates a report which displays all users who have permissions to the mailboxes, mailbox folders, and public folders.



#### 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.

Page 182

Blocked Inheritance
 Explicit Permissions
 Special Permissions
 View

### 5.3 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 <u>Network Inventory</u> function. Also, users and groups must have been inventoried by means 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.

#### 5.3.1 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 or CIFS 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.

#### 5.3.1.1 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 Inventory ribbon or the *Permission Analysis* 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 inventory scan must already have been performed for this company. Otherwise, it will not be possible to retrieve the permissions.

NTFS Permission Analysis							
Company Selection	Please select a company or create a new one:	Select Company     Oreate new Company	iy				
Systems		Select Company					
Juninary	Docusnap Inc		<b>_</b>				

### 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						
Company Selection	Please enter your I	ogin information:				
Summary	Domain: User Name: Password:	docusnap.internal docuen\administrator	Check Credentials			

## 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. 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. Thus, each drive of a system can be selected individually for the permission scan. The <u>Filter</u> 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.

If you wish to exclude a directory from the inventory scan, you can specify this exclusion in the <u>Manage NTFS Filter</u> 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			-	<u> 2</u> 4 (
Company Selection Authentication	Analyze Permissions on Follo	owing Systems			
👯 Systems	Scan Folder Size				
Summary	Host Name	Drive	Free Space	Capacity	Filter
	🖾 🤝 SBDC0002	С	40,95 GB	59,66 GB	Enable Filter
	🗵 🤝 SBEX0001	С	14,48 GB	39,90 GB	Apply Filter
	🗵 🤝 SBPS0001	С	6,31 GB	7,99 GB	
	🖉 🗢 SLDC0001	С	23,10 GB	39,90 GB	Remove Filter
	🖉 🗢 SLSQ0001	С	10,99 GB	19,99 GB	Select
	🖉 🗢 SLSQ0001	E	971,97 MB	1019,72 MB	Select all
	🗵 🤝 SLTS0001	С	25,72 GB	39,90 GB	Deselect all
	🖾 🥯 WBWS0128	С	9,60 GB	23,90 GB	Other
					Excel Export

## Summary Page

All systems and drives to be inventoried will be listed on the Summary page.

Company Selection     Summary       Authentication     Image: Company Selection       Image: Company Selection     Image: Company Selection	
Image: Systems     Image: Analyzed Systems       Image: Summary     Image: SBDC0002	
SBDC0002	
Status C	
Beast Bill SBEX0001	
≥r report C	
🖃 闄 SBPS0001	
G C C C C C C C C C C C C C C C C C C C	
🖃 🦉 SLDC0001	
□ I SLSQ0001	
⇒ c	
₩E	
□ II SLT50001	
Ģ⊂ C	
🖃 🦉 WBWS0128	
G C C	

## Scheduling

By using the <u>scheduling</u> feature, you can specify a later time for the automatic start of the permission scan routine. For this purpose, Scheduling must have been enabled in the <u>Options</u> dialog. 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 installed 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.

Company Selection	Status			
Authentication				
Systems	Name	Туре	Progress in %	Information
Summary	🗉 🎱 NTFS	NTFS		Executing Process: 40 %
Status	SBDC0002 C:\	NTFS		Permission Analysis. 726 Folders have been sear
leport	SBEX0001 C:\	NTFS		Permission Analysis. 1187 Folders have been se
	SLDC0001 C:\	NTFS		Permission Analysis. 1240 Folders have been se
	SLSQ0001 C:\	NTFS		Permission Analysis. 533 Folders have been sear
	SBPS0001 C:\	NTFS		Completed successfully
	SLSQ0001 E:\	NTFS		Completed successfully
	SLTS0001	NTFS		Check connection with remote system

# Summary Page

The Report page displays how many systems have been successfully inventoried. To exit the wizard, click the *Close* button.

NTFS Permission	Analysis			<u> </u>
Company Selection Authentication	Report			
Systems	Name	Туре	Information	
Summary	Summary		Required Time: 00:21:19	
Status	MTFS		Completed	
Report	🖃 🕜 Successful (8)			
	🖃 🍊 NTFS (8)			
	SBDC0002 C:\	NTFS	Scanned successfully	
	SBEX0001 C:\	NTFS	Scanned successfully	
	SBPS0001 C:\	NTFS	Scanned successfully	
	SLDC0001 C:\	NTFS	Scanned successfully	
	SLSQ0001 C:\	NTFS	Scanned successfully	
	SLSQ0001 E:\	NTFS	Scanned successfully	
	SLTS0001 C:\	NTFS	Scanned successfully	
	WBWS0128 C:\	NTFS	Scanned successfully	
				<u>C</u> lose



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.

### 5.3.1.2 Online Analysis

You can start the Online Analysis process from the *Permission Analysis* 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 can 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 written to 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 scan 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.

### 5.3.1.3 NTFS Filter

When performing a <u>permission analysis</u>, Docusnap scans the permissions users and groups have on 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  $\times$  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, afterward click 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 more than one group and click on the condition.

Click Save to apply the settings.

 $\bigcirc$ 

M	Manage NTFS Filter P / 6.1								
		ŧ	And/Or		Field		Operator		Value
+	×				Directory Path	•	Not Contains	•	C:\\Windows
+	×		And	•	Directory Path	•	Not Contains	•	*System32*
+	×		And	•	Directory Path	•	Not Contains	•	*Program Files*
									Save Cancel



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.

#### 5.3.2 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: <u>Basic Steps</u>).

Inventory Company Selection	Inventory SharePoint Server		<u>ل</u> الي 6.1
Normal Authentication		SharePoint Server	
Summary	Name	Security Info	
	smsp0001.docusna	p.intern Special Credential	
	🗵 订 smossdev01	Global Credentials	
	SharePoint: smsp0001.docusna	Add SharePoint Server)	New Delete Save
	Server Authentication	Password:	

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.

### 5.3.3 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: <u>Basic</u> <u>Steps</u>). Then, the *Exchange* step will display.

Inventory					<b>İ</b> Øs <b>6.</b> 1
Company Selection	Inventory	Exchange Server			
Exchange Server     Summary	☑ Scan P ☑ Scan M ☑ Scan P ☑ Scan S	ermissions for Mailboxes Iailbox Folders ermissions for Public Folders pecial Permissions for Mailboxes	Settings	Start	Search Import
			Found Systems		
		Name	Version	Import	Filter
		SCEX0001.rd.docusnap.intern	Version 8.3 (Build 30083.6)	Import	Enable Filter
	2	SMEX0003.docusnap.intern STEX0001.bulk.docusnap.intern	Version 14.0 (Build 30639.21) Version 14.0 (Build 30639.21)	Import Import	Apply Filter     Remove Filter     Select all     Other     Excel Export
				Back	<u>N</u> ext Cancel

### 5.4 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.

#### 5.4.1 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.

Information	Data Permission Analysis
	User Selection
Search	cl
	Cert Publishers (DOCUEN\Cert Publishers)
	Certificate Service DCOM Access (BUILTIN\Certificate Service DCOM Access)
	Charlotte L. Sanders (DOCUEN\Charlotte L. Sanders)
	Christina Grunewald (DOCUSNAP\Christina Grunewald)
	Christof Laafs (DOCUSNAP\Christof Laafs)
	Claudia Steiner (DOCUSNAP\Claudia Steiner)
	Creator Authority (Creator Authority)
KRemove L	Creator Group (Creator Group)
👔 Effective F	Creator Group Server (Creator Group Server)
🔲 🤱 Abi	Creator Owner (Creator Owner)
🗆 🤱 Cha	Creator Owner Server (Creator Owner Server)
n Se d a	Cryptographic Operators (BUILTIN\Cryptographic Operators)
	الــــــــــــــــــــــــــــــــــــ
🗀 🍈 Ellio	Di Nobelts

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.

Sear	ch for Groups and Users		7	6.1
Identit	b b			
S	how Filter 🔰 Search 📓 Save Fi	Iter 🐌 Load Filter 🗹 Select all 🔲 Deselect all		
	Display Name	User Name		
X X X X X X X X X X X X X X X X X X X	Backup Operators beamer01 boston1 Cert Publishers DiscoverySearchMailbox {D919BA054 Distributed COM Users Elliot Roberts Exchange Trusted Subsystem FederatedEmail.4c1f4d8b-8179-4148 Harrison Barber Incoming Forest Trust Builders krbtgt Leon V. Bryant Pre-Ivindows 2000 Compatible Access Public Folder Management SystemMailbox(1f05a927-24b4-463e-9	Backup Operators DOCUENIbeamer01 DOCUENIbeamer01 DOCUENIboston1 DOCUENIboston1 DOCUENIbiscoverySearchMailbox {D919BA05-46A6-415f-80AD-7E09334BB852} BUILTINDistributed COM Users DOCUENIbitor Roberts DOCUENIFEderatedEmail.4c1f4d8b-8179-4148-93bf-00a95fa1e042 DOCUENIFederatedEmail.4c1f4d8b-8179-4148-93bf-00a95fa1e042 DOCUENIFederatedEmail.4c1f4d8b-8179-4148-93bf-00a95fa1e042 DOCUENIFederatedEmail.4c1f4d8b-8179-4148-93bf-00a95fa1e042 DOCUENIFederatedEmail.4c1f4d8b-8179-4148-93bf-00a95fa1e042 DOCUENINIncoming Forest Trust Builders DOCUENIkrbtgt DOCUENIkrbtgt DOCUENILeon V. Bryant BUILTINIPre-Windows 2000 Compatible Access DOCUENINPublic Folder Management DOCUENISvstemMailbox(1f05a927-24b4-463e-9040-ec07aeef603f)		
X	SystemMailbox(e0dc1c29-89c3-4034b Tom Brown	DOCUEN\Tom Brown	pply	Back

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  $\times$  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 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 wore the grouping. It is possible to organize the grouping in several levels. Select more than one group and click on the 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.

Sear	ch fo	or Grou	ps and	Use	ers					P/ 6.	
Identiti	ies										
an 🖉	isable	Filter	🕨 Sea	irch	🔒 Save Fi	lter 🐌 Load Filter 🗹	Sele	ect all 🗌 Des	select	tall	
		1	And/O	r	Field			Operator		Value	
+	×				User Acc	ount Control	•	=	•	Account Activated	
$\mathbf{+}$	×		And	•	Departme	nt	•	Contains	•	Docusnap -	
+	×		Or	-	Departme	nt	•	Contains	-	KFI -	
+	×		And	-	Last Logo	n	•	>	•	01/01/2013	
+	×		And	-	Account	Expires	•	=	-	never	
	Disp	lay Name				User Name					
1	Abig	ail Knight				DOCUEN\Abigail Knigl	ht				
X	Acce	ss-Denie	d Assistar	nce U	sers	DOCUENAccess-Denied Assistance Users					
	Acco	unt Opera	tors			Account Operators					
	Admi	inistrator				DOCUEN\Administrator					
1	Admi	inistrators				Administrators					
L	Alex	Stevenso	n			DOCUEN\Alex Stevens	son				
	Allov	ved RODC	Passwor	rd Rep	plication	DOCUEN\Allowed RO	DC F	Password Repl	icatio	on Group	
	Back	up Operat	ors			Backup Operators					
	bean	ner01				DOCUEN\beamer01					
	boste	on1				DOCUEN\boston1					
Ľ	Cert	Publishers	s			DOCUEN\Cert Publish	ers				
	Certi	ficate Sen	vice DCO	MAc	cess	BUILTIN/Certificate Se	rvice	DCOM Acces	SS		
1	Char	lotte L. Sa	nders			DOCUEN\Charlotte L.	Sand	lers		•	
										Apply Back	

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. Click the *Analysis* 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 *Structure* button.

To delete an entry check the check box of an user or a group and click the *Remove* button.

Information Data Permission Analysis															
User Selection	Т	ype:		Bas	ic Pe	rmis	sions				Inhe	eritan	ice		
Search 🐰 d_logistic (DUCUEN/d_logistic)													les		
🕂 Add 🛛 🥵 Resolve Group 💐 Resolve Group Recursively										2			Pue	SIS	
										ő			ers	ploide	s
					ate	tents			≥	E	~		ppol	1 Sut	Ē
			l o		EXe	0			ē	and	le o		r, Su	r and	and
			Ces		and	older			lolde	Iders	Iders		olde	olde	lolde
🗙 Remove 🗹 Select all 🗌 Deselect all 📲 Analysis 📩 Structure	Allow	Deny	FullA	Modfi	Read	List	Read	Write	This F	Subfo	Subfo	Files	This F	This	This
Provide a contract of the cont					_										
🗆 🤱 Abigail Knight					~	~	~	~							
🔲 🤱 Charlotte L. Sanders					~	~	~								
A d_accounting					~	~	~								
🔲 🤱 Elliot Roberts				~	~	~	~	~							
👔 Explicit Permissions															
R DOCUEN/Charlotte L. Sanders		~											~		
R DOCUEN/Charlotte L. Sanders	~				~	~	~						~		
R DOCUENId_accounting	~				~	~	~						~		
R DOCUEN/d_controlling	~				~	~	~						~		
R DOCUENd_logistic	~				~	~	~						~		
R DOCUEN\d_management		~											~		
R DOCUEN\d_management	~				~	~	~						~		
R DOCUEN\d_shipping	~			~	~	~	~	~					~		
R DOCUEN\d_warehouse	~			~	~	~	~	~					~		
Inherited Permissions															
R Administrators	~		~	~	~	~	~	~					~		
R Creator Owner	~		~	~	~	~	~	~					~		
👫 Local System	~		~	~	~	~	~	~					~		
📢 Users	~				~	~	~	~					~		
Share Permissions															
R 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.

### 5.4.2 Analysis Diagram

The <u>Permission Analysis</u> 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 *Analysis* button to open an additional tab where the permission structure of the selected user or group is displayed. This button is available on the ribbon and on the *Permission Analysis* tab.

# **Permission Analysis**



The *Structure* tab shows which groups the selected user belongs to or which users are members of the selected group. Click the *Structure* button to open the *Structure* tab for the selected group or user.

## **Permission Analysis**



#### 5.4.3 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 (Resource), Directory (Resource), User (Exchange)* or *Overview (Exchange)* 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.

# **Permission Analysis**



The selected node will be used as the starting point.

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.

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.



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

If the *Special Permissions* checkbox is enabled, the *Special Permissions* will be shown. Otherwise, the report will only show the *Basic Permissions*.

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. Usually, the report will show three blocks of permissions (effective, share and NTFS). Using the respective checkboxes you can hide or unhide information.

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

Path\Company\Domain\Starting

Point\Reports\PermissionsDirectory) or (\Documentation Point\Reports\EffectivePermission)

Path\Company\Domain\Starting

Generating Report		øØ <mark>6.1</mark>
Directory Permissions	Report Options:	
	Start Point: J C\$ Levels: 1 -	Levels     Show all Levels     Settings
	<ul> <li>Include Default Groups (e.g. Everyone)</li> <li>Show Only Changes</li> <li>Chang Effective Description</li> </ul>	Exclude Domain Administrators     Show Only Groups
	Show NTFS Permissions	Special Permissions     Show Share Permissions     Output Format
	Format: Horizontal Report  Excel Horizontal Report Vertical Report	
		Create Schedule Cancel

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 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. In addition the language can be chosen.

Generating Report		ə\$ 6.1
Directory Permissions	Company Selection	
Report	Select Company	
E Scheduling	Docusnap Inc	T
	Documentation Path	
	Alternative Documentation Path C:\Docusnap\Docu	
	Language	
	Language: English 💽 Just HTML Documentation	
	A company is selected.	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 *Designs* or the *Define Company Settings* 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*.

Generating Report				<u>ېڭ</u> 6.1
Directory Permissions	Distribution Optio	ns:		
Report	·		Settings	
Scheduling	I Header	Footer	Show Cover	Advanced 👻
				Create DOCX
			Distribution	Create HTML
	E-Mail Distr	ibution		Create XLSX
	Recipient:	docusnap@docusnap.com		Create ODT
	Subject:	Directory Report - SMPS0001		
	Message:			
				Back Next Cancel

In the next 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.

Report Automation	<mark>هې (6.1</mark>
Company Selection	Schedule Report
Scheduling	Common Settings           Name:         Workstation - System Summary           T         Description             T         Description             T         Description             T         Description             T         Description
	Interval: Weekly
	Recurring every:       1       Week(s) on:       Monday       Wednesday       Friday       Saturday         Tuesday       Tuesday       Thursday       Sunday
	Frequency per day
	Duration           Start Date:         2/13/2013           Image: Start Date:         Image: Start Date: Image: Start Date: Image: Start Date: Image: Start Date: Image: Start Date: Image: Start Date: Image: Start Date: Image: Start Date: Image: Start Date: Image: Start Date: Image: Start Date: Image: Start Date: Image: Start Date: Image: Start Date: Image: Start Date: Image: Start Date: Image: Start Date: Image: Start Date: Image: Start Date: Image: Start Date: Image: Start Date: Image: Image: Start Date: Image:
	Job Management         Database Type:       SQLServer         Database:       Docusnapi         Server:       sdevsql01
	Docusnap Server: WKNE0015 Status: started



# 6 License Management

The integrated License Management module in Docusnap enables you to design the process for legal and efficient use of proprietary software and for organizing the licenses purchased in your company. 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 <u>separate section</u>.

The dataset on which License Management is based consists of the software found during the most recent <u>Network Scan</u> 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.

For most License Management analyses, so-called <u>keywords</u> are used. These keywords help you to determine the <u>Software\_Products</u> found on the inventoried systems without having to enter all variants of a software package explicitly. This means that, e.g., different versions of the same software product can be easily covered just by specifying appropriate keywords. An <u>in-depth explanation</u> of the use of keywords and the possibilities they offer will be given in the description of the License Management wizard.

The basic structure used to visualize License Management data consists of the following items:



- <u>Company</u>: As in the <u>Data Explorer</u>, the company represents the base node of the entire structure under which all data will be located.
- Category: All software products recorded in the License Management module must belong to a category. This categorization is used to define the underlying behavior of the License Management module. For example, the types of evaluations to be performed or the types of licensing to be used for the corresponding software product will be defined at this level.
- Group: The software groups in the License Management module of Docusnap serve the same purpose as the folders in the file system on the hard disk. Assigning software products to groups makes it possible to organize the wealth of data in the License Management module in a reasonable and transparent way. Thus, software products can be grouped, for according to example their classification (operating systems, application programs, etc.). What is more, various evaluations are provided in the form of reports at the group level. This allows you to analyze а particular group independently from the products in the remaining groups.
- <u>Product</u>: The so-called "software products" 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.

- Licenses: 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 <u>devices</u> or <u>users</u> a license has been issued for are located below each license.
- <u>Keywords</u>: As mentioned above, keywords are used when determining and evaluating the corresponding installations on the inventoried systems. The flexibility of definition allows you to specify generic keywords. This ensures that no complex searches are necessary to find the entire software inventory.
- <u>Update Paths</u>: Registered software products are not considered exclusively as standalone items by the License Management module, but may also be associated with other software products. This is especially useful if you want to show particular update structures of various versions of the same software.

In addition to the elements mentioned above, the License Management tree view contains several nodes for performing various analyses which will be discussed in a <u>separate section</u>. The <u>Undesired Products</u> 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.

## 6.1 General

The License Management ribbon, whose features will be briefly explained in this section, appears when you select the License Management button from the Navigation pane.

## Wizard

Click the *Create New License* button to start the <u>License Management</u> wizard which helps you create entries for new <u>software products</u>, and define the necessary settings associated with them. If you would like to edit a previously created software product at a later time, you basically have the choice between two options. Either the data of a tree entry can be edited directly on the <u>editor</u>tab, or you can open the License Management wizard by clicking the *Edit License* button. To edit a software product using the License Management wizard, you must select a software product or an object at <u>lower tree level</u>.



### General

You can use the <u>Exclude Systems</u> button to specify that particular, previously inventoried systems are not to be included in license management. This means that software found on these systems will no longer be considered by any of the license management evaluations. This is useful if, for example, test environments exist in the company which do not require coverage by license management. If software installed on certain systems is not to be considered, you can exclude these systems from license management. This is also possible from the Data Explorer of the License Management module.

Since a large amount of data must be processed for the evaluation of licensing issues, the respective queries are cached to reduce latency to a minimum. This caching is a fully automatic process performed in the background and indicated by a corresponding message on the Docusnap status bar. If you suspect that the dataset is out-of-date while Docusnap performs an evaluation in the License Management module, a cache refresh can be triggered manually by clicking the *Refresh Software Cache* button on the ribbon. Please note that this explicit update is not necessary during normal operation, but only in exceptional situations.



### Definition

You can <u>export</u> all static entries about the registered software products to an external file or <u>import</u> such entries from a corresponding, previously exported file, so that these settings do not need to be re-entered from scratch, for example, when switching between databases. With some minor limitations, it is thus possible to import the static settings from earlier Docusnap versions. For these processes, the *Export Definition* and *Import Definition* buttons are available from the ribbon.



### Edit

In general, you can create and edit software products in two ways, i.e. using the <u>License Management</u> wizard and by manually entering/editing data on the <u>Editor</u> tab that displays in the right pane when you select corresponding items in the license tree view. As a general rule, the use of the License Management wizard is easier and safer. Make sure to restrict manual edits to minor changes. As with other Docusnap modules, it is possible to edit entries made manually.

😤 New 🔻 🔚 Save 😑 Delete 🔍 🕒 🕨

## 6.2 License Management Wizard

The easiest way to create new software products or to edit existing entries in the Docusnap License Management module is by using the *License Management* wizard. To open the wizard for creating a new license, click the *Create New License* button on the the License Management ribbon. If a software product or a mode at a level below it is selected in the tree view, you can click the *Edit License* 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 which basically include the following:

- Company Selection
- Category Selection
- Group Selection
- Software Product
- Product Info
- Notes about the Software Product
- License Types (Expected)
- System Assignment
- User Assignment
- Inventory Acquisition (Actual)
- Summary

For detailed explanations of each step from the License Management wizard, refer to the corresponding sections. There, you will also find exemplary use cases and information on best-practices.

#### 6.2.1 Company Selection

The first step of the License Management wizard allows you to select the company

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for which you want to create a <u>software product</u>. Since all evaluations in the License Management module are performed at the company level, the selection made here determines which data will be available in the wizard.

License Managemer	nt 📃 6.1.
Company Category Group Product Product Info Notes Keywords License Types (Expected) I Inventory (Actual)	Company Selection

#### 6.2.2 Category

In the second License Management wizard step, you select a specific category for your <u>software product</u>. This assignment defines the basic settings, such as the type of licensing, for the product. The category you select here determines whether it will be possible to use <u>keywords</u> and define <u>system assignments</u> or <u>user assignments</u> in later wizard steps. To add software categories or edit existing ones from the <u>Manage Software Categories</u> dialog. The word "Manual" in the name of a predefined category indicates that keywords will not be used here, but you will have to enter the used licenses manually. For most cases, it is best to select a category that allows system assignment.

License Manageme	ent	6.1
Company	Assignment of the license product to a category:	
Group Group Product Product Info		T
Notes Keywords License Types (Expected) Inventory (Actual)	Assignment: Hosts Search: No Automatic Assignment	
Summary		

#### 6.2.3 Group

Each <u>software\_product</u> 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 other groups. Either an existing group may be selected, or a new group created, during this third 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, the newly created group will also 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 Manageme	nt 📃	6.1
Company	Group selection for software product	
Category	(Select Group)	
<ul> <li>Product</li> <li>Product Info</li> <li>Notes</li> <li>Keywords</li> <li>License Types (Expected)</li> <li>Inventory (Actual)</li> <li>Summary</li> </ul>	Microsoft Office         Group Name:       Microsoft Office         Description:       Image: Im	V
	<u>N</u> ew <u>S</u> ave	
	In the selected.	ancel

#### 6.2.4 Product

In the fourth 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 vendor (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 vendor 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.

In addition to the general data about the software product, you can specify here whether it is an <u>undesired software product</u> or whether the software is hosted on a terminal server. 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 <u>separate section</u>.

Optionally, you can also select upgrade and downgrade versions of the current software product. 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 2007 that it is an upgrade from MS Office 2003 and a downgrade from MS Office 2010. If multiple downgrade versions of a particular software product exist, you can easily select the ones relevant to your company from the combo box. A product will only be used if you enable its checkbox in the respective line. Simply highlighting the item in the combo box is not sufficient. 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.

		Upgrade:	🗷 🍓 Microsof	t Office 2010	-
	Product Name	Publis	her	Version	
-	🔲 🝶 Microsoft Office 2003	Micros	oft Corporation	2003	
	🔽 🚚 Microsoft Office 2010	Micros	oft Corporation	2010	

A list of all of the installed software products found on the inventoried systems is displayed in the lower part of this wizard page. This list only helps you to specify a meaningful name for the software product and has no influence whatsoever on the way the License Management module works.

Image: Company   Category   Group   Product   Product Info   Notes   Keywords   License Types (Expected)   Inventory (Actual)   Summary <b>Name</b> Name   Name   Microsoft Office Professional Plus 2007   Product Name:   Microsoft Corporation   Version:   12.0.4763.1000   Owngrade:   Upgrade: <b>Current Software List to Support Product Name Selection</b> Microsoft Office Professional Plus 2007   Microsoft Corporation   Microsoft Report Viewer Redistributable 2008 SP1   Microsoft Server Speech Platform Runtime (x64)   Microsoft Server Speech Platform Runtime (x64)   Microsoft Server Speech Platform Runtime (	License Manageme	nt			-	
Category       Basic Information about the Software Product         Product Info       Notes         Notes       Version:         Icense Types (Expected)       Inventory (Actual)         Summary       Current Software List to Support Product Name Selection         Name       Publisher:         Microsoft Office Professional Plus 2007         Purcent Software List to Support Product Name Selection         Summary	Company	Enter basic information about the selected s	software product			
Product       Product Info         Notes       Version:       12.0.4763.1000         Notes       Classification:       Undesired Product       Availability:       Hosted by Terminal Server         Keywords       License Types (Expected)       Inventory (Actual)       Current Software List to Support Product Name Selection         Summary       Name       Publisher       Upgrade:       Image: Imag	Category		Basic Information about the	e Software Product		
Product Info       Publisher:       Microsoft Corporation       Version:       12.0.4763.1000         Notes       Classification:       Undesired Product       Availability:       Hosted by Terminal Server         Keywords       Downgrade:       Upgrade:	Product	Product Name: Microsoft Office Pr	rofessional Plus 2007			
Notes       Classification:       Undesired Product       Availability:       Hosted by Terminal Server         License Types (Expected)       Inventory (Actual)       Owngrade:       Upgrade:         Summary       Current Software List to Support Product Name Selection       Filter         Microsoft Help Viewer 1.1 Language Pack - DEU       Microsoft Corporation       Filter         Microsoft Office 2003 Web Components       Microsoft Corporation       Microsoft Office Professional Plus 2007         Microsoft Office Professional Plus 2007       Microsoft Corporation       Microsoft Corporation         Microsoft Report Viewer Redistributable 2008 SP1       Microsoft Corporation       Microsoft Report Viewer Redistributable 2008 SP1         Microsoft Report Viewer Redistributable 2008 SP1       Microsoft Corporation       Microsoft Corporation         Microsoft Report Viewer Redistributable 2008 SP1       Microsoft Corporation       Microsoft Corporation         Microsoft Report Viewer Redistributable 2008 SP1       Microsoft Corporation       Microsoft Corporation         Microsoft Report Viewer Redistributable 2008 SP1       Microsoft Corporation       Microsoft Corporation         Microsoft Report Viewer Redistributable 2008 SP1       Microsoft Corporation       Microsoft Corporation         Microsoft Report Viewer Redistributable 2008 SP1       Microsoft Corporation       Microsoft Corporation <tr< td=""><td>Product Info</td><td>Publisher: Microsoft Corporat</td><td>ion</td><td>Version:</td><td>12 0 4763 1000</td><td>)</td></tr<>	Product Info	Publisher: Microsoft Corporat	ion	Version:	12 0 4763 1000	)
Keywords       Undesired Product       Availability:       Hosted by Terminal Server         Downgrade:       Upgrade:       Upgrade:       Inventory (Actual)         Summary       Name       Publisher       Filter         Microsoft Help Viewer 1.1 Language Pack - DEU       Microsoft Corporation       Filter         Microsoft Office 2003 Web Components       Microsoft Corporation       Filter         Microsoft Office Professional Plus 2007       Microsoft Corporation       Apply Filter         Microsoft Office Professional 2007       Microsoft Corporation       Microsoft Office Professional 2007         Microsoft Office Professional 2007       Microsoft Corporation       Microsoft Corporation         Microsoft Report Viewer Redistributable 2008 SP1       Microsoft Corporation       Microsoft Report Viewer Redistributable 2008 SP1         Microsoft Server Speech Platform Runtime (x64)       Microsoft Corporation       Microsoft Server Speech Recognition Language - TEL         Microsoft Server Speech Recognition Language - TEL       Microsoft Corporation       Microsoft Server Speech Recognition Language - TEL	Notes					
License Types (Expected) Inventory (Actual) Summary Name Vultistic Support Product Name Selection Name Name Name Name Name Name Name Name	Keywords	Classification: Undesired Pro	duct	Availability:	Hosted by Te	erminal Server
Inventory (Actual) Summary Name Voltarian Volt	License Types (Expected)	Downgrade:	•	Upgrade:		-
Name       Publisher         Improvement       Microsoft Corporation         Improvement       Microsoft Office Professional Plus 2007         Improvement       Microsoft Office Professional Plus 2007         Improvement       Microsoft Office Professional Plus 2007         Improvement       Microsoft Office Visio Professional 2007         Improvement       Microsoft Office Visio Professional 2007         Improvement       Microsoft Corporation         Improvement       Microsoft Report Viewer 2012-Laufzeit         Improvement       Microsoft Corporation         Improvement       Microsoft Corporation         Improvement       Microsoft Corporation         Improvement       Microsoft Report Viewer Redistributable 2008 SP1         Improvement       Microsoft Report Viewer Redistributable 2008 SP1 Lan.         Improvement       Microsoft Server Speech Platform Runtime (x64)         Improvement       Microsoft Server Speech Recognition Language - TEL.         Improvement       Microsoft Server Speech Recognition Language - TEL.         Improvement       Microsoft Se	Summary		Current Software List to Support	Product Name Selec	ction]	
<ul> <li>Microsoft Help Viewer 1.1 Language Pack - DEU</li> <li>Microsoft Corporation</li> <li>Microsoft Office 2003 Web Components</li> <li>Microsoft Corporation</li> <li>Microsoft Office Enterprise 2007</li> <li>Microsoft Corporation</li> <li>Microsoft Office Professional Plus 2007</li> <li>Microsoft Corporation</li> <li>Microsoft Office Professional Plus 2010</li> <li>Microsoft Corporation</li> <li>Microsoft Office Visio Professional 2007</li> <li>Microsoft Corporation</li> <li>Microsoft Office Visio Professional 2007</li> <li>Microsoft Corporation</li> <li>Microsoft Report Viewer 2012-Laufzeit</li> <li>Microsoft Corporation</li> <li>Microsoft Report Viewer Redistributable 2008 SP1</li> <li>Microsoft Corporation</li> <li>Microsoft Server Speech Platform Runtime (x64)</li> <li>Microsoft Corporation</li> <li>Microsoft Server Speech Recognition Language - TEL.</li> <li>Microsoft Server Speech Recognition Language - TEL.</li> <li>Microsoft Server Speech Recognition Language - TEL.</li> </ul>		Name	Publisher	r	<b>^</b>	Filter
<ul> <li>Microsoft Office 2003 Web Components</li> <li>Microsoft Corporation</li> <li>Microsoft Office Enterprise 2007</li> <li>Microsoft Corporation</li> <li>Microsoft Office Professional Plus 2007</li> <li>Microsoft Corporation</li> <li>Microsoft Office Professional Plus 2010</li> <li>Microsoft Corporation</li> <li>Microsoft Office Visio Professional 2007</li> <li>Microsoft Corporation</li> <li>Microsoft Office Visio Professional 2007</li> <li>Microsoft Corporation</li> <li>Microsoft Report Viewer 2012-Laufzeit</li> <li>Microsoft Corporation</li> <li>Microsoft Report Viewer Redistributable 2008 SP1</li> <li>Microsoft Corporation</li> <li>Microsoft Report Viewer Redistributable 2008 SP1 An</li> <li>Microsoft Corporation</li> <li>Microsoft Server Speech Platform Runtime (x64)</li> <li>Microsoft Corporation</li> <li>Microsoft Server Speech Recognition Language - TEL.</li> <li>Microsoft Server Speech Recognition Language - TEL.</li> <li>Microsoft Server Speech Recognition Language - TEL.</li> </ul>		Microsoft Help Viewer 1.1 Langua	age Pack - DEU Microsoft	Corporation		Enable Filter
<ul> <li>Microsoft Office Enterprise 2007</li> <li>Microsoft Office Professional Plus 2007</li> <li>Microsoft Corporation</li> <li>Microsoft Office Professional Plus 2010</li> <li>Microsoft Corporation</li> <li>Microsoft Office Visio Professional 2007</li> <li>Microsoft Corporation</li> <li>Microsoft Report Viewer 2012-Laufzeit</li> <li>Microsoft Report Viewer Redistributable 2008 SP1</li> <li>Microsoft Corporation</li> <li>Microsoft Report Viewer Redistributable 2008 SP1</li> <li>Microsoft Corporation</li> <li>Microsoft Report Viewer Redistributable 2008 SP1</li> <li>Microsoft Corporation</li> <li>Microsoft Server Speech Platform Runtime (x64)</li> <li>Microsoft Server Speech Recognition Language - TEL.</li> <li>Microsoft Server Speech Recognition Language - TEL.</li> <li>Microsoft Server Speech Recognition Language - TEL.</li> </ul>		Microsoft Office 2003 Web Comp	onents Microsoft	Corporation		Apply Filter
Microsoft Office Professional Plus 2007       Microsoft Corporation         Microsoft Office Professional Plus 2010       Microsoft Corporation         Microsoft Office Visio Professional 2007       Microsoft Corporation         Microsoft Report Viewer 2012-Laufzeit       Microsoft Corporation         Microsoft Report Viewer Redistributable 2008 SP1       Microsoft Corporation         Microsoft Report Viewer Redistributable 2008 SP1 Lan.       Microsoft Corporation         Microsoft Server Speech Platform Runtime (x64)       Microsoft Corporation         Microsoft Server Speech Recognition Language - TEL.       Microsoft Corporation         Microsoft Server Speech Recognition Language - TEL.       Microsoft Corporation		Microsoft Office Enterprise 2007	Microsoft	Corporation		
Microsoft Office Professional Plus 2010       Microsoft Corporation         Microsoft Office Visio Professional 2007       Microsoft Corporation         Microsoft Report Viewer 2012-Laufzeit       Microsoft Corporation         Microsoft Report Viewer Redistributable 2008 SP1       Microsoft Corporation         Microsoft Report Viewer Redistributable 2008 SP1       Microsoft Corporation         Microsoft Report Viewer Redistributable 2008 SP1       Microsoft Corporation         Microsoft Report Viewer Redistributable 2008 SP1 Lan       Microsoft Corporation         Microsoft Server Speech Platform Runtime (x64)       Microsoft Corporation         Microsoft Server Speech Recognition Language - TEL       Microsoft Corporation         Microsoft Server Speech Recognition Language - TEL       Microsoft Corporation		Microsoft Office Professional Plus	s 2007 Microsoft	Corporation		Remove Filter
Microsoft Office Visio Professional 2007       Microsoft Corporation         Microsoft Report Viewer 2012-Laufzeit       Microsoft Corporation         Microsoft Report Viewer Redistributable 2008 SP1       Microsoft Corporation         Microsoft Report Viewer Redistributable 2008 SP1       Microsoft Corporation         Microsoft Report Viewer Redistributable 2008 SP1       Microsoft Corporation         Microsoft Report Viewer Redistributable 2008 SP1 Lan.       Microsoft Corporation         Microsoft Server Speech Platform Runtime (x64)       Microsoft Corporation         Microsoft Server Speech Recognition Language - TEL.       Microsoft Corporation         Microsoft Server Speech Recognition Language - TEL.       Microsoft Corporation		Microsoft Office Professional Plus	s 2010 Microsoft	Corporation		
Image: Construct Speech Platform Runtime (x64)       Microsoft Corporation         Image: Construct Speech Platform Runtime (x64)       Microsoft Corporation         Image: Construct Speech Platform Runtime (x64)       Microsoft Corporation         Image: Construct Speech Recognition Language - TEL.       Microsoft Corporation         Image: Construct Speech Recognition Language - TEL.       Microsoft Corporation         Image: Construct Speech Recognition Language - TEL.       Microsoft Corporation		Microsoft Office Visio Professiona	al 2007 Microsoft	Corporation		
Microsoft Report Viewer Redistributable 2008 SP1       Microsoft Corporation         Microsoft Report Viewer Redistributable 2008 SP1 Lan.       Microsoft Corporation         Microsoft Server Speech Platform Runtime (x64)       Microsoft Corporation         Microsoft Server Speech Recognition Language - TEL.       Microsoft Corporation         Microsoft Server Speech Recognition Language - TEL.       Microsoft Corporation		Microsoft Report Viewer 2012-Lau	ufzeit Microsoft	Corporation		
Microsoft Report Viewer Redistributable 2008 SP1 Lan. Microsoft Corporation     Microsoft Server Speech Platform Runtime (x64) Microsoft Corporation     Microsoft Server Speech Recognition Language - TEL. Microsoft Corporation     Microsoft Server Speech Recognition Language - TEL. Microsoft Corporation		Microsoft Report Viewer Redistrib	butable 2008 SP1 Microsoft	Corporation	•	
Microsoft Server Speech Platform Runtime (x64)     Microsoft Corporation     Microsoft Server Speech Recognition Language - TEL.     Microsoft Server Speech Recognition Language - TEL.     Microsoft Corporation		Microsoft Report Viewer Redistrib	butable 2008 SP1 Lan Microsoft	Corporation		
Microsoft Server Speech Recognition Language - TEL. Microsoft Corporation Microsoft Server Speech Recognition Language - TEL. Microsoft Corporation		Microsoft Server Speech Platform	n Runtime (x64) Microsoft	Corporation		
Microsoft Server Speech Recognition Language - TEL. Microsoft Corporation		Microsoft Server Speech Recogni	ition Language - TEL Microsoft	Corporation		
		Microsoft Server Speech Recogni	ition Language - TEL Microsoft	Corporation		
					•	
		A product name is defined but not review	wed yet.		<u>B</u> ack	Next Cano

#### 6.2.5 Product Info

The fifth step of the License Management wizard allows you to enter additional information about the current <u>software product</u>. These entries will be used to display selected evaluations 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 Manageme	nt	<u>p_4</u>	6.1
Company	Enter information critical for using the selected software product		
Group	Oper	arating Subgroup	_
Reduct	Technical: Daniel Green	Legal: Geoffrey Brown	
Notes	Owner	er of the Software	_
Keywords	Technical: Daniel Green	Legal: Geoffrey Brown	
<ul> <li>Inventory (Actual)</li> </ul>	User	er of the Software	_
Summary	Technical: Daniel Green	Legal: Geoffrey Brown	
	(Additional Op	perating Site Information	_
	City: Washington, D.C.	Country: United States	
	Operation Area:	Language: English U.S.	
	Valid input is defined.	<u>B</u> ack <u>N</u> ext Can	cel

#### 6.2.6 Notes

The sixth step allows you to specify additional information on the current <u>software</u> <u>product</u>, 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.

License Manager	ment E6.1
Company	Enter additional Information on the selected software product:
Group	Notes on the selected software product
<ul> <li>Product</li> <li>Product Info</li> </ul>	B / U ABC ▲ - Arial - 10 - ■ 三 三 三 4 ♥ ┃ % ₪ ®
Notes	

#### 6.2.7 Keywords

If you selected a category for automated inventory determination in the <u>second</u> <u>step</u> of the License Management wizard, you can define suitable keywords here to search for corresponding installations on the inventoried systems without having to specify each single variant of a software. Even if you selected a particular category, it is still possible to disable the use of keywords by unchecking the corresponding checkbox at the top of the wizard page. This, however, considerably limits the possibilities for automated evaluation. The almost unlimited combination of keywords lets you adjust the keywords individually to each and every situation.

The keywords can be defined in the standard mode or the expert mode.

## Standard Mode

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.

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. This list will not affect any evaluations that performed later and serves exclusively as an aid for entering keywords.
License Managemer	nt						6.1
Company	Define including an	id excluding Keywords				۲	Standard © Expert
Category			Кеум	ords			
R Product	Product Name			Publisher			Version
Product Info	E. R Including	Keywords					
1 Notes	···· 🚜 % Micr	osoftOffice%		Microsoft%			12%
Keywords	Excluding	Keywords %		Microsoft%			12%
License Types (Expected)	<i>P</i> %Shar	epoint%		Microsoft%			12%
(), License Types (Expected)							
Summary	Keyword Type: Product Name: Publisher:	Including Keyword     Microsoft Office%     Microsoft%	Details for sele	cted Keyword )— Keyword	Version:	12	2%
	Name		Publisher		Version		Filter
	.NET Reflector	r 7	Red Gate Software Ltd		7.2.0.143		💎 Enable Filter
	🝓 7-Zip 9.20					Δ	C Apply Filter
	a 7-Zip 9.20		Igor Pavlov		9.20.00.0		Bemove Filter
	Adobe Flash F	Player 11 ActiveX	Adobe Systems Incorpo	orated	11.3.300.257	₽	(g) Homoror mon
	Adobe Reader	XI (11.0.03) - Deutsch	Adobe Systems Incorpo	orated	11.0.03	-	
					New	D	elete <u>S</u> ave
	🔇 Valid keywords are	defined.			Back		Next Cancel

### Expert Mode

When switching to the expert mode it is possible to define the keywords in even greater detail. Above all in the expert mode conditions can be grouped and linked with *And* or *Or*.

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  $\times$  to delete the current row.

Operator

In the column *Operator* you can choose between *Contains, Contains not,* = and <>. It is possible to use wildcards for specify the keywords.

- 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 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 worke the grouping. It is possible to organize the grouping in several levels. Select more than one group and click on the 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.

License Managemer	nt				<u> </u>	6.
📕 Company					Standard Ex	pert
🐧 Category					0	
📴 Group		Sear	ch Criteria			
Roduct					Preview	
Product Info		l/Or Field	Operato	r Value		
1 Notes	+ × 🗉	Product Name	- Contains	s 🔹 Office		
🕅 Keywords	🕂 🗙 🗔 🔚 And	Product Name	- Contains	windows	7	
License Types (Expected)	🕂 🗙 🗆 🗖 Or	<ul> <li>Product Name</li> </ul>	<ul> <li>Contains</li> </ul>	windows	8	
Inventory (Actual)	🕂 🗙 🔲 🛛 And	d ▼ Product Name	<ul> <li>Contains</li> </ul>	VMware	Fools	
Summary						
	Name	Operating System	Platform	Processor Name	Count Cores	
	NMWS0032	Microsoft Windows 7 Enterprise	GenuineIntel	Intel(R) Xeon(R)	2 1 1	
	1 WMWS0064	Microsoft Windows 7 Enterprise	GenuineIntel	Intel(R) Xeon(R)	2 1 1	
	💐 WMWS0254	Microsoft Windows 7 Enterprise	GenuineIntel	Intel(R) Xeon(R)	C 2 2	
	💐 WMWS0333	Microsoft Windows 7 Enterprise	GenuineIntel	Intel(R) Xeon(R)	2 2 2	
	1 WMWS0700	Microsoft Windows 7 Enterprise	GenuineIntel	Intel(R) Xeon(R)	2 1 1	
	IMWS0701	Microsoft Windows 7 Enterprise	GenuineIntel	Intel(R) Xeon(R)	C 1 1	
	MWS0702	Microsoft Windows 7 Enterprise	GenuineIntel	Intel(R) Xeon(R)	S 1 1	
	💐 WMWS0703	Microsoft Windows 7 Enterprise	GenuineIntel	Intel(R) Xeon(R)	G 1 1	
	WMWS0704	Microsoft Windows 7 Enterprise	GenuineIntel	Intel(R) Xeon(R)	i 1 1	
	MWS0705	Microsoft Windows 7 Enterprise	GenuineIntel	Intel(R) Xeon(R)	i 1 1	
	MWS0706	Microsoft Windows 7 Enterprise	GenuineIntel	Intel(R) Xeon(R)	2 1 1	
	WMWS0707	Microsoft Windows / Enterprise	GenuineIntel	Intel(R) Xeon(R)		
	WMWS0708	Microsoft Windows / Enterprise	Genuineintel Genuinelntel	Intel(R) Xeon(R)		-

#### Preview

Click *Preview* button to apply the search words and display the installed software the conditions match.

### 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.
_ (underscore)	Replaces any single character. Application: _	_ocusnap> returns all entries that end with

Page 2	20
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Wildcard	Meaning and application	Example
		"ocusnap" and are preceded by any single character.
0	Any one character contained in a given range of characters. Application: [a] or [abcdef] or [a-f]	Do[ck]usnap> returns all entries containing the word "Docusnap" or "Dokusnap".
[^]	Any one character not contained in a given range Application: [^a] or [^abcdef] or [^a-f]	Dousna[^b]> 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.

# 6.2.8 License Types (Expected)

You can assign multiple licenses to each <u>software product</u> registered in Docusnap.

These licenses map the real-life software licenses actually purchased or the corresponding license agreements concluded. When performing an <u>evaluation</u>, 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(s). 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 dialogs accessible from the Management ribbon, you can edit or delete existing <u>license types</u> and <u>software maintenance types</u> 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	t						6
Company	Pagister licenses fr	vr ourrent ooftware pr	aduat				
T Category	Register licenses to	or current software pr	oduct				
🚦 Group			(	Licenses			
Roduct	News		Linear Trees	Dauaht	Malid call	Maintanana Tura	Maiatanana
Product Info	Name	fanai anal Rha 200	License Type	Bought	Valid Until	Maintenance Type	Maintenanc
Notes	Unice Pro	ressional Plus 200	volume license	10	Uniimited	Software Assurance	Unlimited
Keywords							
License Types (Expected)							
Inventory (Actual)							
Summary							
			Details fo	or selected Lic	ense		
	Name:	Office Professional	Plus 2007 VL	Lic	ense Type:	Volume license	•
	Bought Licenses	Limited to	10 🜩	Lic	ense valid:	Unlimited Validit	ty
		O Unlimited				◯ Valid until: 14.	02.2013 👻
	Maintenance:	Software Assurance	e 🔹	Ma	intenance vali	d:      Onlimited Validit	tv
						○ Valid until: 14.	02.2013 👻
						<u>N</u> ew <u>D</u> elete	<u>S</u> ave
	Valid licenses are de	efined.				Back	lext Cance

#### 6.2.9 System Assignment

If, in the <u>second step</u> of the License Management wizard, you selected a category which allows you to manually assign licenses to systems, this wizard page will display all identified systems, grouped by domains and subdomains. Please note that the list will only show systems where an operating system is installed that has been selected on the License Management page of in the Options dialog. All previously entered licenses for the current software product as well as any systems 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. Generally, multiple assignments are not allowed.

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. 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 category 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 systems have been assigned, the number of processors if processors have been assigned, and the number of processor cores if processor cores have been assigned. For categories 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 Managemer	nt			<b></b> 6.1
Company	Assign systems to licenses			
🚦 Group				Import Computer List
👸 Product	Filter expression for unassigned systems.	<b>I</b>	<u>A</u> dd>>	Filter expression for assigned systems.
🛱 Product Info	Unassigned Systems		<< <u>R</u> emove	Assigned Systems
1 Notes	bulk.docusnap.intern			⊡ Source Professional Plus 2007 VL
🕼 Keywords	🖃 👭 docusnap.intern			💐 WMWS0944
1. License Types (Expected)				💐 WMWS0113
🐓 System Assignment	- # SMDC0002			WMWS0064 (found)
Inventory (Actual)	SMDC0003			····· 🗮 WMWS0032 (found)
	- IN SMESX02			
Summary				
	J SMII0001			
	II SMI10002			
	🕴 SMPS0001			
	📰 SMRA0001			
	🔰 SMSP0001			
	🕴 SMSP0002			
	📗 SMSQ0001			
	🖳 test			
	🖏 WMLX0007			
	🍂 WMWS0199			
	🌬 WMWS0254 (found)			
	🌉 WMWS0333 (found)			
	🐙 WMWS0610 (found)	-		
	There are valid assignments.			Back Next Cancel

### Import Computer List

In Docusnap, you can use the <u>DocusnapTSInfo</u> 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 Manageme	nt		<b></b> 6.1
Company	Assign systems to licenses		
Group	\\stbl01\Builds\TsInfo		Import Computer List
👸 Product	Filter expression for unassigned systems.	<u>A</u> dd>>	Filter expression for assigned systems.
🛱 Product Info	Unassigned Systems	<< <u>R</u> emove	Assigned Systems
1 Notes	bulk.docusnap.intern	_	⊡ 🥩 Office 2007 Enterprise VL
🕼 Keywords	🖃 👭 docusnap.intern		🕘 SLFS0001
1. License Types (Expected)			
👙 System Assignment			
Inventory (Actual)			E S Office 2007 Enterprise OEM
Summary	# SMSP0001		🔰 SLDC0001
	🚯 WMLX0007		# SMDC0003
	M WMWS0254 (found)		
	a www.sussa (tound)		
	- II SBDC0001		
	III SBEX0001		
	😻 SBPS0001		
	SLSQ0001 (found)		
	rd.docusnap.intern		
	There are valid assignments.		Back Next Cancel

#### 6.2.10 User Assignment

If, in the <u>second step</u> of the License Management wizard, you selected a category 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 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 Managemer	nt 📃 6.1
Company	Map users to existing licenses
Tategory	
🚦 Group	Import User List
R Product	Filter expression for unassigned users.
🛱 Product Info	Unassigned Users Assigned Users
1 Notes	Replikations-Operator
Keywords	Richtlinien-Ersteller-Besitzer
	- Schema-Admins
Icense Types (Expected)	- Schreibgeschützte Domänencontroller
User Assignment	
Inventory (Actual)	Server Management
	Server-Operatoren
Summary	
	SRV_MOSS_FARM
	& SRV_MOSS_IIS
	& SRV_MOSS_INSTALL
	🐍 SRV_MOSS_SEARCH
	🐍 Sven Kurzeder
	🐍 SystemMailbox{1f05a927-968e-449a-a429
	👗 SystemMailbox{e0dc1c29-89c3-4034-b678
	😤 Terminalserver-Lizenzserver
	& U_Allgemein
	😣 U_Anlagenbuchhaltung
	& U Controlling
	- St. U Finanzen
	Ihere are valid assignments.     Back     Next     Lancel

### Import User List

In Docusnap, you can use the <u>DocusnapTSInfo</u> application to create a log of all users 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.



### 6.2.11 Inventory Determination (Actual)

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 keywords. 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 <u>System Assignment</u> step. This is an alternative way to assign licenses to systems. This procedure is not available for <u>user assignment</u>. This exclusive assignment will not be reflected in the way how the <u>software products</u> are displayed in the license tree view. It will, however, be taken into account in the <u>evaluations</u> 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 *Identified automatically* field. The difference between this number and the number of available, registered, purchased licenses will be shown in the License Balance field. 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 the 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 data of the registered licenses.

License Manageme	nt						6.1
Company	Define correction values for inve	ntory					
資 Category							
🚦 Group		Curren	t Inventory				
Roduct	Use exclusive assignme	nt - calculation of the actual license asse	ets only considers as	ssigned systems			
🛱 Product Info	Name	Operating System	Platform	Processor Name	Count	Cores	
1 Notes	💐 WMWS0032	Microsoft Windows 7 Enterprise	GenuineIntel	Intel(R) Xeon(R) C	1		1
🕼 Keywords	1 WMWS0064	Microsoft Windows 7 Enterprise	GenuineIntel	Intel(R) Xeon(R) C	1		1
1. License Types (Expected)	WMW/S0254	Microsoft Windows 7 Enterprise	GenuineIntel	Intel(R) Xeon(R) C	1		1
System Assignment	WMW50333	Microsoft Windows 7 Enterprise	GenuineIntel	Intel(R) Xeon(R) C	1		2
Inventory (Actual)			Generation	initial(i i) / Boni(i i) C			-
Ummary							
		Correction \	/alue And Notes				
	Identified automatically:	5 Systems		Correction Value:			0
	Available Licenses	10 Systems		License Balance:			5
	Notes:						
	Data was loaded successfull	v.		Back	Next		Cancel

### 6.2.12 Summary Page

The last step of the License Management wizard presents a summary of all settings specified previously, except the <u>note fields</u>. The changes are only applied to the database when you click the *Finish* button. If you click the *Cancel* button here, all changes made, including any <u>software groups</u> you might have created, will be discarded.

		~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	4
Company	Summary of the selected options.		
Category			
🚦 Group	Summary		
Product	🖃 🛄 Company		
	Attribute	Value	
Product Info	🛄 Company Name	Docusnap Inc	
Notes	🖃 🖉 Category		
Keywords	Attribute	Value	
	🦾 Name	Device license	
Icense Types (Expected)	···· 🥔 Assignment Method	Hosts	
Inventory (Actual)	🦾 🥔 No Automatic Assignment	No	
Summary	🖃 🏭 Group		
	Attribute	Value	
	🎎 Group Name		
	🖃 🧟 Software Product		
	Attribute	Value	
	🦓 Product Name	Microsoft Office Professional Plus 2007	
	🦓 Publisher	Microsoft Corporation	
	👰 Version	12.x	
	🖓 Undesired Product	No	
	🦓 Correction Value	0	
	🚚 Technical Responsible	Daniel Green	
	🚚 Legal Responsible	Geoffrey Brown	
	🦓 Technical Owner	Daniel Green	
	🚚 Legal Owner	Geoffrey Brown	
	🖓 Technical User	Daniel Green	
	🛺 Legal User	Geoffrey Brown	
	City	Washington, D.C.	

### 6.3 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 <u>editor</u> 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.

Compar	iy: Docusnap Inc			
	Name	Domain	•	Filter
- 4	WKNV0007	docusnap.internal		🗾 Enable Filter
- 🍓	WKNVV001	docusnap.internal		En Apply Filter
🗆 🚲	WKNW0001	docusnap.internal		
🗆 🚲	WKNX0001	docusnap.internal		E Remove Filter
	WLWS0088	docusnap.internal		Other
🗆 🐌	WMLX0007	docusnap.intern		Excel Export
🗆 🍂	WMWS0032	docusnap.intern		
🗆 🍬	WMWS0064	docusnap.intern		
🗵 🍓	WMWS0113	docusnap.intern		
🗆 🍂	WMWS0199	docusnap.intern	1	
🗆 🍬	WMWS0254	docusnap.intern		
🗆 🍬	WMWS0333	docusnap.intern		
🗆 🍬	WMWS0610	docusnap.intern		
🗆 🍬	WMWS0944	docusnap.intern		
🗆 🚲	WOFFICEDEV01	docusnap.internal		
🗆 🔮	ZBR4299775	docusnap.internal		
			-	
•				

### 6.4 Export Definitions

You can export all static data related to the registered <u>software products</u> to an external file, so that these settings need not be re-entered from scratch, for example, when switching between databases. Click the *Export Definition* button in the License Management 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. Click the the *Export* button to export all selected software products to the specified file. Please note that only software products whose checkbox is enabled will be exported.

ile N	ame: C:\I	Docusnap\LicenseDefinition.dlu				
	Company	Group	Name	Publisher	Version	Filter
] 💫	Docusnap Inc	Forbidden	iTunes	Apple Inc.		Enable Filter
] 🔊	Docusnap Inc	Microsoft Application Server	Microsoft Exchange Server Standard 2010	Microsoft Corporation		Apply Filter
] 🔊	Docusnap Inc	Microsoft Office	Microsoft Office Enterprise 2007	Microsoft Corporation	12.x	
] 🐊	Docusnap Inc	Microsoft Office	Microsoft Office Professional Plus 2007	Microsoft Corporation	12.x	Remove Filter
] 🎝	Docusnap Inc	Microsoft Office	Microsoft Office Professional Plus 2010	Microsoft Corporation	14.x	Select
] 🎝	Docusnap Inc	Microsoft Office	Microsoft Project Professional 2010	Microsoft Corporation	14.x	Select all
] 🎝	Docusnap Inc	Microsoft Office	Microsoft Visio Professional 2010	Microsoft Corporation	14.x	Deselect all
] 🎝	Docusnap Inc	Microsoft OS	Microsoft Windows 7 Enterprise	Microsoft Corporation	6.x	Other
] 🎝	Docusnap Inc	Microsoft OS	Microsoft Windows 7 Ultimate	Microsoft Corporation	6.x	
] 🎝	Docusnap Inc	Microsoft OS	Microsoft Windows 8	Microsoft		Excer Export
] 🎝	Docusnap Inc	Microsoft OS	Microsoft Windows Server 2008 R2 Enterprise	Microsoft Corporation		Þ
] 🐊	Docusnap Inc	Microsoft OS	Microsoft Windows Server 2008 Standard	Microsoft Corporation	6.x	
] 🎝	Docusnap Inc	Microsoft OS	Microsoft Windows Vista Enterprise	Microsoft		Ē

# 6.5 Import Definitions

You can import previously <u>exported\_license definitions</u> to another database. To do so, click *Import Definition* button. 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 Docusnap 6 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.

Impo	ort Definitio	ns						6.1
File	Name:	:\Docusnap	\LicenseDefinition.dlu					
Targe	et Company:	Docusnap In	c		•			
Impo	rt Range:	Software F	Producte	Product Info	Notes on the Software F	Producte	Keyworde	
		Update Pa	ith	Licenses	Extensions			
		_ ·			_	1		
	Group		Name		Publisher	Version	Und	Filter
🗵 💫	Forbidden		iTunes		Apple Inc.		Yes	Enable Filter
🗵 灯	Microsoft App	lication Ser	Microsoft Exchange	Server Standard 2010	Microsoft Corporation		No	Apply Filter
🗵 灯	Microsoft Offi	ice	Microsoft Project Pro	ofessional 2010	Microsoft Corporation	14.x	No	
🗵 縜	Microsoft Offi	ice	Microsoft Visio Profe	ssional 2010	Microsoft Corporation	14.x	No	Hemove Filter
🗵 🎒	Microsoft Offi	ice	Microsoft Office Prof	essional Plus 2010	Microsoft Corporation	14.x	No	Select
🗵 🎒	Microsoft Offi	ice	Microsoft Office Ente	erprise 2007	Microsoft Corporation	12.x	No	Select all
🗵 灯	Microsoft Offi	ice	Microsoft Office Prot	essional Plus 2007	Microsoft Corporation	12.x	No	Deselect all
🗵 灯	Microsoft OS		Microsoft Windows S	Server 2008 R2 Enterprise	Microsoft Corporation	No	Other	
🗵 灯	Microsoft OS		Microsoft Windows S	Server 2008 Standard	Microsoft Corporation	6.x	No 🖡	
🗵 灯	Microsoft OS		Microsoft Windows \	/ista Enterprise	Microsoft		No	Excel Export
🗵 🍠	Microsoft OS		Microsoft Windows 7	Enterprise	Microsoft Corporation	6.x	No	
🗵 灯	Microsoft OS		Microsoft Windows 7	'Ultimate	Microsoft Corporation	6.x	No	
🗵 灯	Microsoft OS		Microsoft Windows 8	1	Microsoft		No	
•							þ	
								mport Close

### 6.6 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 <u>tree view</u> in the License Management module and evaluations presented as <u>reports</u>. 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 defined keywords to the inventoried software dataset and thus are based on the identified systems where the corresponding installations have been found. <u>Undesired Products</u> 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 match the corresponding combination of keywords are displayed here. Accordingly, installations of products for which no keywords have been defined or categories whose products have been entered manually will not be shown under this caption. Found installations are grouped by name, vendor (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, four additional nodes are available 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 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 defined keywords 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 keywords. 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.



# **Evaluations in Reports**

Reports present evaluations at the product, group and company levels.

For these reports, Docusnap calculates the license balance. There are two different evaluation variants.

# 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.

# License Management

Variance Analysis		-	Sum of all valid licenses. If the number of licenses is unlimited the peeded amount of licenses
Available Licenses	13	$\leftarrow$	is displayed.
In use (mapped automatically)	10	←	Number of systems the
Correction Value (manual)	0		software is installed on.
Subtotal	3		Number of licenses used by
Correction Upgrade / Downgrade Licenses	0	$\leftarrow$	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	
Microsoft Office Professional Plus 2010	10	1	0	9	0	

# 6.7 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 either from the License Management wizard or by using the editor. 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.

# 6.8 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.



# 7 Organization



Using extensions, you can add extra information to the objects listed in the Explorer. The extensions can be comments, finance data, passwords, contracts or reminders. The tabs for entering comments, finance data, passwords, contracts or reminders will be displayed when you click an object in the Data Explorer, License Management explorer or Organization explorer.

# Extensions

# Organization

# 7.1 Extensions



Extensions allow you to add some extra information to individual objects in Docusnap. For example, the *Passwords* extension provides a comfortable way to manage credentials, and the *Contracts* extension lets you store and manage contractual agreements.

The following extensions are currently available in in Docusnap:

Comments			
Finances			
Passwords			
Contracts			
Reminders			

The extensions can be created, displayed and managed on additional tabs in the main window. For each of these extensions, you can store attachments, such as purchase contracts, SLAs and more.

# Attachments

### 7.1.1 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* button on the *Comments* tab 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.

A special feature is that you can save a *.txt* file as a comment. When you use drag & drop to add a *.txt* file to the list, Docusnap retrieves its information and applies it to the corresponding fields (*Title, Description,* etc.). Before saving the file, set the comment type in the *Comment Type* dialog.

To edit a saved comment, select it and click the *Edit Selected* button. Its comment will be displayed on the *General* tab. There, you can edit the comment. Click the *Save* button to apply the changes. To delete a comment, click the *Delete* button.

You can also add attachments to an extension. 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.

Infor	mation	Data	IT Relations	Comments (	2) Finance (8)	P	asswords (4)	Contracts (4	) Reminde	rs (4)			
	Title			Comme	ent Type		Description					Actions	
	User Mar	iual		User M	anual		User Manual i	s located in th	e attachments			🕒 P New	
V	Firewall (	Configura	tion File	User M	anual		Configuration	File is located		Save			
												R Delete	
												Demoission	
											<u> </u>	The Permission	
Gen	eral At	tachmer	nts (1)										•
	Title:		User Man	ual				(	omment Type:		User Manual	-	
	Show in F	Reports:	Show at t	he Beginning	•			C	ategory:		Organization	•	
	Descriptio	on:	В /	U ABC	🖌 👻 Arial		•	10 -		≡ 4	🥐   X 🖻 🛍		
			User Ma	anual is loca	ted in the attac	hme	ents						

### 7.1.2 Finances

The *Finance* extension is 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* button on the *Finance* tab 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* button. To edit a saved financial data entry, select it and click the *Edit Selected* button. Its content will be displayed on the *General* tab. You can edit the data in this data entry screen. To apply the changes, click the *Save* button.

# Organization

Relations Comments (2)	Finance (8) Pa	sswords (4) Contra	cts (4) Reminders (	4)		
Cost Type	Payment	Amount	Description	Document Number	(▲	Actions
irect Costs	One-time	499,00	Employee: Robert 4	48642315		9 New
irect Costs	One-time	1.099,00	Location: 3. floor, r 4	48642315	5	
irect Costs	One-time	399,00	Car: M-IT-123 1	17742		Save
irect Costs	One-time	545,00	Location: 2. floor, r 3	33547979	_	🔀 Delete
	<u> </u>	00.001.00	14 IT 444			
0						•
Mobile Phone 48642315 499,00 Direct Costs One-time B Z U ABC A Employee: Robert Herr	▼ ▼ Arial nann	-	Cost Center: Date of Purchase: Useful Life [Months]: Depreciation Method Special Depreciation Category:	18.10.2011 :		▼ 36 ▼
	elations Comments (2) sst Type rectCosts rectCosts rectCosts rectCosts Mobile Phone 48642315 499,00 Direct Costs One-time B I U ABC A Employee: Robert Herr	elations       Comments (2)       Finance (8)       Payment         rect Costs       One-time       rect Costs       One-time         rect Costs       One-time       One-time       rect Costs         rect Costs       One-time       One-time       Image: Costs       One-time         image: Costs       One-time       One-time       Image: Costs       Image:	elations       Comments (2)       Finance (8)       Passwords (4)       Contra contra amount         sst Type       Payment       Amount         rectCosts       One-time       499,00         rectCosts       One-time       399,00         mobile Phone       0       10         49642315       0       10         Direct Costs       v       10         Employee: Robert Hermann       10	elations       Comments (2)       Finance (8)       Passwords (4)       Contracts (4)       Reminders (         sst Type       Payment       Amount       Description       Image: Costs (4)       Reminders (       Reminders (         rect Costs       One-time       Amount       Description       Image: Costs (4)       Reminders (         rect Costs       One-time       1.099.00       Location: 3. floor, r       Image: Costs (4)       Reminders (         rect Costs       One-time       399.00       Car: M-IT-123       Image: Cost (4)       Image: Cost (	elations       Comments (2)       Finance (8)       Passwords (4)       Contracts (4)       Reminders (4)         sst Type       Payment       Amount       Description       Document Number         rectCosts       One-time       1.099.00       Location: 3.ftoor, r.       48642315         rectCosts       One-time       1.099.00       Location: 3.ftoor, r.       48642315         rectCosts       One-time       399.00       Car: MIT-123       17742         rectCosts       One-time       545.00       Location: 2.ftoor, r.       33547979         image: transformed in the state of	elations Comments (2) Finance (8) Passwords (4) Contracts (4) Reminders (4)   set Type   Payment Amount Description Document Number   rectCosts   One-time 1.099,00 Location: 3. floor, r., 49642315   rectCosts One-time 399,00   car: M-IT-123 17742   rectCosts One-time   0ne-time 399,00   car: M-IT-123 17742   rectCosts One-time   0ne-time 545,00   Location: 2. floor, r., 3547979   Mobile Phone   Cost Center:   Mobile Phone   Cost Center:   Mobile Phone   Cost Center:   Date of Purchase:   18.10.2011   499,00   Useful Life [Months]:   DirectCosts   One-time   Special Depreciation:   Category:   Management   B   I   Management

#### 7.1.3 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* button on the *Passwords* tab. 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 and click the *Edit Selected* button. Its content will be displayed on the *General* tab.

Click the **R** 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 <u>Password Logging</u> is enabled, Docusnap will keep a log of all users who copied or displayed the password.

Information	Data	IT Re	elations	Com	ments (2)	Finance (8)	Passwords (4)	Contrac	ts (4)	Reminders	(4)			
Title			User Nar	ne		Password T	уре	Passwor	d Validi	ty	System Na	me		Actions
🔬 Wlan_Gu	est Encry	ption				Wi-Fi Protec	ted Access (WP	Unlimited			SSID: Wlan	_Guest		🦻 New
🐅 Wlan_Inte	ern Encryp	otioin				Wi-Fi Protec	ted Access (WP	Unlimited			SSID: Wlan_Intern			Save
🔬 SQL Sen	/er - SMS0	200	user			User Passw	ord	Limited			SMSQ0001			Save
🔬 WMWS-0	01 Bios P	ass				BIOS Passw	vord	Limited			WMWS-00	1		🔀 Delete
•													•	Permission
General A	ttachmen	ts (0)												-
Title:			Wlan_Gu	iest En	cryption				Pass	word Type:	Wi-Fi	Protected Acc	cess (V	VPA)
User Nan	ne:					Sys				iystem Name: SSID: Wlan_Guest				
Password	t:		*****			Password Valid:				🗹 Unli	mited			
URL:									Valid	Until:				•
Category			Administra	ation		¥								
Descriptio	on:		B /	Ū	ABC ABC	Arial	-	10 -		≡ ⊒ ∐	(4) (4)	X 🖻 🛍		
1														

#### 7.1.4 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* button on the *Contracts* tab to add a new contract for the selected object. 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 <u>notifications</u> when the contract has expired.

To edit a saved contract, select it from the list and click the *Edit Selected* button. Its content will be displayed on the *General* tab. Edit it and click the *Save* button.

Info	formation Data IT Relations Co				ommen	its (2)	Finance (8)	Pass	words (4)	Contrac	ls (4)	Reminders	(4)				
	Title		Contract	Numbe	r (	Contract	Partner		Customer N	lumber	Stree	t	ZIP	Code	City	Actions	
-	Employme	ent Contr	12344950	)	D	)ocusnaj	p AG				36 OI	d Jewry	Lond	on EC2R 8	London	New	
<b>-</b>	RO-IT-56	75 Leasi	12515684	405	L	easing (	âmbH		007882472		Half N	loon Stree			London	Save	
-	Sales Cor	ntract WL.	48423451	355	C	Computer	AG		1382452305	5	Edgw	are Rd 42			London		
-	Service Le	evel Agr	464867		S	SLA Clier	nt		9178972		Innstr	. 22	8033	1	Munich	Z Delete	
															•	R Permission	
Ge	neral At	tachment	ts (0)														
	Title:		Empl	oyment	Contract	t Flora Br	ettschneider				Contra	act Number:		12344950			
	Contractin	Contracting Partner: Docusnap AG								Customer Number:							
	Street: 36 Old Jewry				I							ZIP:			London EC2R 8DD		
	City:		Lond	on							Country:			United Kingo	dom	-	
	Post Offic	e Box:									Phone	Number:					
	Email:										Webs	ite:					
	Start Date	i:	27.12	2.2011			•				Contra	act Type:		Employment	Contract	•	
	End Date:		23.0	2.2013			•				Categ	jory:		Organization	ı	-	
	Descriptio	B	<u>U</u> AB€	<u> </u>	Arial		- 1	.0 -		≣≣₿	49	P   X	à 🛍				

### 7.1.5 Reminders

The *Reminders* extension type allows you to enter meetings, reviews and other events.

Thanks to the <u>Notifications</u> 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. The causes the due reminders to be listed in the e-mail attachment.

Click the *New* button on the Reminders tab 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 the *Save* button, you add the reminder to the list. To edit a saved reminder, you must select it from the list and click the *Edit Selected* button in the ribbon. Its content will be displayed on the *General* tab. Edit it and click the *Save* button.

Information	Data	IT Relation	าร	Comments (2)	Financ	e (8)	Passwor	rds (4)	Contracts (4)		Reminders (4)			
Title			Rer	minder Type		Priorit	У	Remin	der Date	De	escription		Date Created	Actions
🕘 Staff Mee	ting - 1pm	1	Mee	eting		High		26.08.2	013	Ag	jenda as Attachme	nt	27.12.2011	🦻 New
🕀 Call Mr. N	liller		Pho	ne Call		High		06.09.2	013	Br	uce Miller		11.10.2012	🔜 Save
E-Mail Fa	cility Mar	agement	E-M	lail		High		04.10.2	013	Repair			11.10.2012	
🕀 Proposal	to Mr. Jor	ies	E-M	lail		High		21.08.2	013	Ste	ephen Jones		11.10.2012	🔀 Delete
•								1					•	<table-of-contents> Permission</table-of-contents>
General At	tachmen	ts (1)												•
Title Reminder Reminder	Date: Type:	Staff 26.00 Meet	Mee 8.20 <sup>-</sup> ing	ting - 1pm 13		•			Cal	ority tega	r: pry:	High Organizat	tion	•
Descriptio	и.	<b>B</b> Ager	/ nda	U ABC A	Arial			- 1	.0 - 1		= = E 9	<b>**</b>   **		

### 7.1.6 Attachments

For each extension, you can add attachments. To manage attachments for an extension, click the *Attachments* tab next to the *General* tab in the editing dialog of the extension.

#### Adding Attachments

There are two ways to add attachments.

- Click the New button on the Attachments tab to enable the data entry screen where you can define the attachment. When you click the Choose File 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 the Save button.
- You can also use *drag* & *drop* to add files to the attachments. Simply drag the desired file into the table on the *Attachments* tab 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 *Open* button

#### **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.

Info	rmation	Data	IT Relations	Com	ments (2)	Finance (8)	) P	asswords (10)	Contra	cts (3)	Reminders	(1)		
	Title	-			Comment T	уре		Description	-					Actions
	User Mar	nual			User Manua	l		User Manual is	located i	n the app	endix			9 New
V	Firewall (	Configura	ation File		User Manua	l								Save
														🔀 Delete
														R Permission
			- (1)											
Gen	eral A	llachmei	IIS (1)				1			1				-
	Title				File Name		Path	1		File Siz	ze	User		Actions
	Docusna	p Manua	l English		Docusnap_	Manual_En				77,87 k	В			🦻 New
														🖶 Save
														🔀 Delete
														🜔 Open
														🔓 Check Out
•													•	Check In
	Title:		ocusnap Manual	English	1									
	File:	C	)ocusnap_Manual	L_Englis	h.pdf							Size:	77,87 kB	Choose File
	Descripti	on:	B <i>I</i> <u>U</u> ♣	BC A	• Arial			÷ 10	- =	<b>E E</b>	E 9 9	X Pa	Ē.	
											,			
1														

### 7.2 Organization

When you select the *Organization* option from the Navigation pane, the *Organization* ribbon will appear. The Organization module allows you to view all extensions.

The organization tree is displayed in the Explorer pane. It contains all extensions, both summarized under the *All* node and grouped by company. Additionally, reports for evaluating the extensions are available.

The extensions are displayed on tabs in the data window. The *Edit Selected* and *Delete Selected* buttons on the ribbon are only enabled when an extension is selected in the data window.



To open the selected extension in the editing window, click the *Edit Selected* button.

To remove the selected extension, click the *Delete Selected* button. This also deletes the extension node at its original position from the tree view.

From the *Organization* ribbon, it is possible to create new extensions. From the *New* group, comments, passwords, financial elements, contracts and reminders can be added. Clicking one of the button there opens the corresponding dialog.



The same dialog displays for creating new extensions and for editing existing ones. The only difference is that for editing, the dialog will be populated with the values for the selected extension.

The list box in the upper left corner indicates where the extension is located within the tree structure. When you create a new extension, select the object for which you are creating the extension from this list box. When editing an existing extension, you can use this list box to select a different node in the tree view where to place the current extension. The *General* tab contains a data entry screen. It is similar to the data entry screen used for entering new extensions. If you modify a data entry screen, the user interface of the editing dialog will reflect these changes. To save the edited or newly created extension, click the *Save* button. To undo the changes, click the *Close* button. When you are in the process of creating a new extension, clicking the *Close* button will discard everything you entered so far for the extension.

Extension					6.1
🚚 docusnap.internal	•				
General Attachments (1)					•
Title	liser Manual		Comment Tupe:	Ilser Manual	
Show in Benorts:	Show at the Beginning		Category:		
Description:					
Description.	<b>B</b> <i>I</i> <u>U</u> ABC <u>A</u> • Microsoft Sans Serif • 10	• <mark>=</mark> =	<b>≝</b> E   % ♥   % □		
	Oser Manuaris localed in the allachments				
					<u>S</u> ave
					Close

### Attachments

Attachments can be added to each extension. Clicking the *Attachments* tab next to the *General* tab opens a dialog that allows you to select the file to be attached. 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. To save the file as an attachment in the database, click the *Save* button.

You can also add files to the attachments using *drag* & *drop*. To do so, select the file, hold down the left mouse button and drag the file to the table. When you use drag & drop to add an entire directory or multiple files to the table, all respective files will be added in one go. 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. The attachments added by *drag* & *drop* will be immediately saved in the database. There is no need to add them by clicking the *Save* button.

### **Opening Attachments**

To open an attachment in an application, first select the file. Then click the *Open* button to open the file in the default application set for this file type in the system. The file will be saved in the *Temp* folder.

### **Editing Attachments**

will be saved in the folder you specify here.

Attachments can be edited once you have saved them. To edit the file, you must select it. Then, click the *Check Out* button to open the path selection dialog. The file

Checking the *Execute file after completing action* checkbox below the path specification will open the folder. You can open the file from this folder. After saving the changes, you can update the file in the database by clicking the *Check In* button. The file will not be deleted from the hard disk.

ttension Docusnap Inc			T							
eneral Attachr Title Docusnap_Use	ments (1) er_Manual.pdf	File Name Docusnap_User_Manual.pdf	Path	File Size 27,64 MB	User	Ch	Actions			
							Save Save Delete			
						•	Check Out			
Title: File:	Docusnap_User_Manual.pdf         Size:         27.64 MB         Choose File									
Description:	B Z U ABC	Arial	↓ 10 , E = =	E % ♥ %						
							<u>S</u> ave			
							Close			

# 7.3 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 Organization 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.

🚳   Close							Organiz	ation		Docusnap 6.1			- ē X
Inventory	Documentation	Managemer	nt Advi	anced	Tools	Help	Organiz	ation					
Edit Sele	cted 🛛 🔯 Add Co	omment	Add C	Contract									
Delete Se	elected 🔊 Add Pa	esword	Add B	Reminder									
Derete of	Add Fir	nannon Dotail	- Aug	Chinaci									
	Addin	nance Detail											
Genera	al	New	r ] r				-						
∰New ∎S	Save 🗖 Delete 🔍		I	nformati	ion Da	ata (13)							
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B- Docu	usnap Inc			S DOCI	JSNAP\a	Ы	W	IA0001 - Mac	Show Password	23.01.2013 13:50:21	admin	WMA0001	
<b>₽</b> ₽2	comments		1	S DOCI	JSNAP\b	va	W	W/S001 Bios Password	Show Password	14.02.2013 10:19:22		WMWS001	
	inance		1	B DOCI	JSNAP\c	da	W	IA0001 - Mac	Show Password	08.01.2013 14:20:33	admin	WMA0001	
	SOI Server - SMS	00001	1	S DOCI	JSNAP\d	fe	Do	cusnap Homepage	Show Password	10.01.2013 08:32:52	admin	www.docusnap.com	
	Wan Intern Encry	ption		S DOCI	JSNAP\e	de	W	IA0001 - Mac	Show Password	11.01.2013 08:28:32	admin	WMA0001	
	WMLX0007 - Linux			S DOCI	JSNAP\e	fg	W	IA0001 - Mac	Show Password	06.01.2013 16:35:45	admin	WMA0001	
	WMA0001 - Mac		1	S DOCI	JSNAP\e	fg	Do	cusnap Homepage	Show Password	26.01.2013 17:45:01	admin	www.docusnap.com	
B- 🐅	Wan_Guest Encry	ption	8	S DOCI	JSNAP\h	er	Do	cusnap Homepage	Show Password	28.01.2013 08:40:55	admin	www.docusnap.com	
B- 9	WMWS0113 Bios F	Password	_ 8	S DOCI	JSNAP\jł	e	Do	cusnap Homepage	Show Password	13.03.2013 18:22:10	admin	www.docusnap.com	
1 2 2	WMWS001 Bios Pa	assword		S DOCI	JSNAP\m	iki	Do	cusnap Homepage	Show Password	16.02.2013 17:21:53	admin	www.docusnap.com	
1 7	Docusnap Homepa	ige		S DOCI	JSNAP\p	ha	W	1A0001 - Mac	Show Password	13.02.2013 08:48:45	admin	WMA0001	
-	Password Log	ldfo		S DOCI	JSNAP\p	or	E-I	lail (user@docusnap.com)	Show Password	16.01.2013 07:20:52	user		
		Nefa	1	S DOCI	JSNAP\n	/0	Do	cusnap Homepage	Show Password	29.01.2013 11:36:55	admin	www.docusnap.com	
	- & DOCUSNAP	\her											
	🖲 DOCUSNAP	∿jhe											
	🔱 DOCUSNAP	°/mki											
	🦾 🤱 DOCUSNAP	°/rvo											
÷ 💡	E-Mail (user@docu	usnap.com)	Ē										
1 2 2	WMLX0001 - Linux		F.										
	SMSQ0001 - SQL	Server											
	Password Log	a											
	DOCUSNAP\by	" a											
	DOCUSNAP\cd	a											
	- 💰 DOCUSNAP\dfe	e											
	- 🤱 DOCUSNAP\ed	le											
	- 👗 DOCUSNAP\efg	9	<b>_</b>										
	Data Explorer												
<u> </u>	IT Documentation	n											
<b>P</b> '4	Permission Analy	sis											
<b>.</b>	License Managen	nent											
	Organization												
	IT Relations												
	IT Concepts												
💊 Inventory	Status: 🕕 Inactiv	ve   🚳 l	Docusnap	Server:	🕑 star	ted	🖑 Cacl	e Update 🕕 Inactive	🥺 Database Connection	ns 🔺 🛛 Licensed to: Docus	nap AG		

You can set <u>permissions</u> to limit the right to view the password log to particular users.

# 7.4 Categories and Permissions

To restrict access to the extensions, you can use categories and permissions.

### Categories

Click the *Categories* button on the *Advanced* ribbon to open the Manage Categories dialog. This dialog enables you to create <u>Categories</u>. These categories are linked to roles and the role determines which categories will be visible to a user with this role. In the data entry screens for extensions, the categories you created are listed in the *Category* drop-down list box for selection. If you select the *<No* selection*>* category for an extension, it remains visible to all users.

Manage Categ	Orjes Organization				or 6.1
German Text:	Organisation	Englis	sh Text:	Organization <u>N</u> ew	Delete Save
Role			Category		Visible
🔊 Administration		<b>~</b>	Organization		
🧔 Inventory			Administration		
🔊 Organization		r 🗋	Fechnology - Tr		
🧀 License Manag	gement	✓ 1	Fechnology - Ge		
参 View		7	Fechnology - Inf		
参 Customizing		7	Fechnology - Te		
🤣 User Managen	nent	7	Fechnology - Ex		
🤣 Permission An	alysis	✓ 1	Management		×.
🤣 IT Documentat	ion				
🦽 IT Relations					
					<u>S</u> ave

When you select a category, the extension will only be displayed if the current user has been assigned a role to which this category is visible.

Information	Data	IT Relations	Comments (2)	Finance (8)	Passwords (4)	Contracts (4)	Reminders (4)			
Title Comment Type						Description				
🐼 User Manual User Manual I						User Manual is located in the attachments				
🔯 Firewall Configuration File User Manual					Configuration	Configuration File is located in the attachments				
									No Delete	
•									M Permission	
General At	tachmer	its (1)							•	
Titler		Lloor Mon				Com	mont Tupo:	Lloor Monuol		
nue.		User Mari	uai			Com	menit rype.	User Mariuar		
Show in F	eports:	Show at t	he Beginning	•		Cate	gory:	Organization		
Descriptio	n:	B 7	U ARE A	Arial	•	10 🗸 🔳		Administration	^	
		:		in the etter.			,	Organization		
		UserMa	anual is localed	in the attach	nents			Technology - External E	mployees	
								Technology - Infrastruct	ure	
								Technology - Technical	Sales	
								Lechnology - Trainees	-	
1		I								

Access restrictions for extensions also apply to the *organizational hierarchy*. For this reason, extensions are only displayed to authorized users. If a user has been assigned the *Administrator* role, all extensions are shown. Extensions 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 extensions by clicking the <u>Permission</u> 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 extension.


# 8 IT Relations

The IT Relations module in Docusnap allows you to map the relations between the components of your IT environment. This enhances the transparency of your network organization.

IT relations 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, IT relations help you to determine the various connection types and the protocol used for each connection.

## 8.1 Create IT Relations

To create a new IT relation, navigate to the IT Relations module. First, selected the desired company in the tree view, then create a new relation by clicking the *New* button above the tree and selecting IT Relation. Specify a name for the relation. Now you can create a diagram on the *IT Relations* tab.

The right pane shows the Data Explorer tree. It contains the data from the most recent network inventories.

Select a component and drag it to the *IT Relations* tab while holding down the left mouse button.

#### Page 255

# **IT Relations**



#### Ribbon

The *IT Relations* ribbon allows you to define additional settings for creating the relations.

Use the *New, Save* and *Delete* buttons above the tree view to create or delete new relations or save changes made to existing relations.

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.

The *Pointer Tool* allows you to select individual components by a mouse click.

If the *Connector* button has been selected, you can create a relation connector using the mouse. Do so so, click a component and drag the mouse (while holding down the mouse button) to the second component. This will connect the two components.

To move the entire diagram, click the *Move* button.

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.

Manage: By clicking the buttons in the *Manage* group, you can open <u>management</u> <u>dialogs</u> for protocols, connection types and displayed fields.

## 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.

Select	
Delete	
Group	
Connect with 🔸	Docusnap AG
Align Center	ADS Benutzer
Align Middle	docusnap.intern
Same Hight	SMDC0002
Same Width	WDS0008

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.

Select
Delete
Swap

Using the context menu options, it is also possible to rearrange groups or resize them.

Select	
Delete	
Connect with	•
Resize	
Rearrange Group	+
Rearrange Group Recurs	ive 🕨

### **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 *Display Fields for Relations* dialog. Optionally, you can add to the properties by editing the *tRelLink* table in the *Manage Metatables* dialog. Adding objects to the databases and entry screens is described in the Administrator Manual.

# Opening IT relations from other tree views

The *IT Relations* 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 and can be edited or deleted.



# 8.2 Userdefined Settings

#### Protocols

For each connector, you can select the protocol to be used for the corresponding connection from the Properties entry screen. Docusnap provides a number of predefined protocols. In the Manage Protocol Types dialog, you can create additional protocols.

Manage Pro	otocol Types		оØ	6.1
Name				
S HTTP				
HTTPS				
<table-of-contents> FTP</table-of-contents>				
SMTP				
POP3				
🔊 IMAP				
🗿 NNTP				
A DNS				
Since Telnet				
SNMP				
SSH				
IPFIX				-
				•
Name:	HTTP			
German Text:	HTTP			
English Text:	HTTP			
		New	<u>D</u> elete <u>S</u> é	ave
				<u>C</u> lose

# **Relation Types**

You can map the connection between two components using a relation type. If required, you can add more relation types in the Manage Relation Types dialog.

_	Name				
**	Parent Child				
*8	Used by				
\$3	Connected w	ith			
\$3	Copy of				
\$3	Related to				
\$3	Needed For				
lam	e: nan Text:	Parent Child Bestandteil von			
ierr ngl	ish Text:	Parent Child			 
ierr ingli ype	ish Text: ::	Parent Child	Color:	-	 
ierr ingli ype ityle	ish Text: ::	Parent Child	Color:	•	 ]

# **Display Fields**

Each connection has properties, such as a name, a description, a priority, etc. that you can select for display in the relation diagram. Individual properties can be defined from the *Manage Tables* dialog. Major changes to the table, however, are only possible through the Customizing module. Then, you can add the new fields to the display. For each relation, you can select the fields to be displayed from the *Display Fields for Relations* dialog.

Disp	lay Fields for Relations			6.1
	Field Name			
1	Name			
	Description			
	Protocol			
	Priority			
		<u>o</u> K	Ca	ncel



# 9 IT Concept

The IT Concepts module in Docusnap allows you to create concepts by using the whole set of retrieved data, associated documentation, and IT 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 an IT Concept
Versioning
Templates
Designs
Styles
Export and Scheduling
Assignment
Conversion

# 9.1 Menu Ribbon

The IT Concepts ribbon displays when you have selected IT Concepts in the Navigation pane. Using this ribbon, you can edit and change concepts.



# **IT Concepts**

 Export: Using the *Export* button, you can export your concept to Word, PDF, or other formats.

- Edit: A click on the *Edit* button launches the IT Concept Editor where you can edit the selected IT concept.
- Refresh: Use the *Refresh* button to update the IT concept. This reloads the data for data elements, reports, etc. and recreates the table of contents.
- Print: By clicking the *Print* button, you can print the selected IT concept.
- <u>Assign</u>: Clicking this button opens the *Assign IT Concepts* dialog which allows you to insert the desired concept into other tree views. It is also possible to add an *IT concept folder* to a node in one of the other trees.
- Keep Version: Since only a certain number of versions of a document can be stored, you can click this button to select and keep a certain version. This prevents the current document version from deletion.
- <u>Schedule as Job</u>: Clicking this button opens a wizard which allows you to schedule creation of an IT concept for a certain date and time.
- Templates: Clicking the *Templates* button opens the *Manage IT Concept Templates* dialog.
- Docusnap 6.0 Migration: If the database still holds Docusnap 6.0 concepts which have not been migrated to the new IT Concept format, you can start the migration by clicking the *Docusnap 6.0 Migration* button.

# **Text Editor**

D Page Setup ¶≣ Paragraph Options	X Cut Select all		View • 🏦 Find
⊾ Tabs	Paste (PRedo		X Delete
Settings	Edit	Format 🕞	View

### 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 IT concept. You can specify whether you would like to refresh the entire IT 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 IT concept.

General

#### 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.

**IT Concept** 

- Hierarchical structure: By clicking the arrows, you can change the hierarchical level and order of the headings in your IT concept.
- Find: The A button allows you to quickly find particular parts in the entire text quickly and easily.
- Replace: The  $\frac{1}{2}$  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**

Page 264

For text formatting, <u>Styles</u> 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 IT concept.
- Spell Check: Click the Spell Check button to start the integrated spell checker.
- Validate: By clicking the Validate button, you can check the IT concept for validity. Any errors found will be displayed in the error list. An error is present if, e.g., an inserted relation 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 IT concept. Here, the title and author of the IT concepts may be changed. You can also enter an additional description. The properties also include additional information such as the date when the IT concept was last modified.



### Insert

Use the Insert ribbon to insert different <u>elements</u> into your IT 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 relation, 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 *relations,* you can click the *Refresh* button to load their current version.
- Delete: Click the *Delete* button to delete the selected element.



# **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**

Page 267

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.

Settings	🔥 Select Table
	🕂 Select Row
	💦 Select Cell
	Table

#### **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 yo 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.

Header from Top	1,00 🌲
H Footer from Bottom	1,00 🌻
Position	

# 9.2 Create Concept

To create a new IT concept, change to the IT Concepts module. You can either create a directory below the company where the IT concepts will be stored or integrate your IT concepts directly below the company.

To create a new directory, select the desired company in the tree view, click the *New* button and select IT Concept Directory. After naming the directory, you can save it so that it will be displayed in the IT Concepts explorer. You can also enter an additional description.

# **IT Concept**

Close		IT Concepts	Docusnap 6.1	
Inventory Documentation Management	Advanced Tools Help [	Docusnap Test IT Concepts		
Export Edit Refresh Print Schedule as	n Templates			
			· • • •	
New - Carlosave Delete	Information Data (1) Edito	or Comments (U) Finance (U) Contracts (U) Re	ninders (U)	
B- Docusnap Inc	General			•
학교 Usaster Hocivery 다 나 SKS 아이아이아이아이아이아이아이아이아이아이아이아이아이아이아이아이아이아이아이	Name: 0 Description: C	Iperations		

To create a new document for your IT concept, you must either select a company - if the document is to be located under a company node - or a directory where the document will reside after its creation. Then, click the *New* button and select *Create IT Concept*.

This opens the *Create IT Concept* dialog where you can either create an empty document or use a template to create your new document. Enter a name for the IT concept and click the *Create* button. The concept then opens automatically in the *IT Concept Editor*.

Create IT Concept	۵ 🧧	1
Concept Name: Operations Manual	Language: English	•
Select Template	Template	
Empty Document Recovery Plan Emergency Manual		
Template Description		
	Create <u>C</u> ancel	

IT concepts are created and managed in Docusnap. For editing IT concepts, the <u>IT</u> <u>Concept Editor</u> is available.

## 9.2.1 General

When you create an IT concept, the files are stored in the directory you have selected for IT concepts in the *Options* dialog. To enable multiple persons to work

on the same concepts, you can select to store the concepts on a network drive. Every IT concept is assigned to a single company set up in a database. Once Docusnap is connected to this database, the corresponding IT concepts are displayed in the Explorer.

When you select an IT concept in the Explorer, the *IT Concept* ribbon is displayed. Clicking the *Edit* button opens the concept in the *IT Concept Editor* where it can be edited.

The various elements can be inserted either through the buttons located on the *Insert* ribbon or by dragging and dropping 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.

#### 9.2.2 IT Concept Editor

For creating and editing IT concepts, the IT Concept Editor is available. The IT Concept Editor opens automatically when you create a new IT concept or when you open an existing IT concept for editing.



### Ribbons

The <u>Ribbons</u> allow you to define the settings for formatting, content, and view, etc. of your IT concept.

## Document

Use the document area to create your IT 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 IT 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 IT concept. The variables can also be inserted by clicking the Variable button from the *Insert* ribbon.

### Tasks

If <u>Placeholders</u> 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 IT concept for validity. Any errors found will be displayed in the error list. An error is present if, e.g., an inserted relation 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 IT Concept Editor.

#### Page 272

#### 9.2.3 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 IT 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.

Select Variable		٩	6.1
□····································			
	Insert	<u>C</u> ar	ncel

Alternatively, variables may also be dragged from the Variables window on the right-hand side of the IT Concept Editor and dropped onto the document.

### Header and Footer

You can also add headers and footers to your IT 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 an IT 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.

Insert Table	-	6.1
Rows:	Columns:	5 🜲
	<u>0</u> K	<u>C</u> ancel

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 are can also be found in the <u>Table Tools</u> 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 IT 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.

Edit Hyperlink Ø 6.1
Linked Text: Docusnap Website
Linked to
Website or Local File Target in this Document
www.Docusnap.com
<u>O</u> K <u>C</u> ancel

#### Picture

It is possible to add pictures to your IT 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.

Picture Properties	;	6.1
Text Wrapping Size		▼
	Text Wrapping	
In Line with Text	Top and Bottom	ght In Front of Text
Behind Text		
	Text Alignment	
<ul> <li>Left</li> </ul>	Center	Right
	Distance from Text	
Тор:	0.00 cm Right:	0.00 📥 cm
Bottom:	0.00 cm Left:	0.00 📥 cm
		OK Cancel

# **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.

Text Box Prop	perties	6.1
Text Wrapping	Size Border and Color	▼
	Text Wrapping	
In Line with Te	xt Top and Bottom	Tight In Front of Text
Behind Text		
	Text Alignment	
<ul> <li>Left</li> </ul>	© Center	Right
	Distance from Tex	t
Top:	0.00 🜩 cm Rig	ht: 0.00 🛨 cm
Bottom:	0.00 🛖 cm Lef	t: 0.00 🜩 cm
		<u>D</u> K <u>C</u> ancel

### **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.

#### 9.2.4 Table of Contents

Click the *Table of Contents* button to add a table of contents to your IT 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 IT 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.

Table of	Table	Picture	( Hyperlink	<b>I</b> Variable	A
Contents *					Box
Content					
1. Heading 1				1	
1.1. Heading	2			1	
11.L H	ading 3			1	
Content					
1.Heading 1				i	
1.1. Heading	2			1	
111.He	ading 3			î	
Content					
1.Heading 1				1	
1.1. Heading	2			1	
1.1.1.Be	ading 3			1	

#### 9.2.5 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 IT 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.



Page 278

### 9.2.6 Data Element

You can insert current data from Docusnap into the IT concept. This loads table content into the IT 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 IT concept.



Alternatively, you also can select the desired table content from the *Objects* window and insert it by drag and 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.

ata Selection	6.1
Add Data Element	
OAdd Variable Field	
Column	Value
Name	WMWS0032
Online	WMI Error
Domain	docusnap.intern
Туре	Workstation
Description	
Exclude from License Manageme	No
Virtualization Host	
Virtualized	No
Chassis Types	Other
	<u> </u>

After the table with its data has been inserted into the IT 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 set the columns to be displayed.

Add Row Delete	Row Filter Name Exclude from Lice	0nl:	Column Options Name Online	]	_			
	Name Exclude from Lice	0nl: ?	☑ Name ☑ Online					
	Exclude from Lice	ə	🗹 Online			Type	Description	
I	12 13				al	ized	Chassis Types	
		1	Type     Type     Description     Exclude from Li     Virtualization Ho     Virtualized     Chassis Types	icense Manag ost	ement	l <sup>0</sup>	. 1 <sup>7</sup> 1 <sup>8</sup>	· · · · · P · · · · · · · · ·
	Name		Online	Don	nain	Туре	Description	
	Exclude from Lice Management	ense	Virtualization Host		V	irtualized	Chassis Types	
	WMW\$0032	WM	Error	docusnap	.intern	Workstation		
	No				No		Other	
	WMWS0064	Time	eout	docusnap	intern	Workstation		
	No				Yes		Other	
	WMWS0113	Time	eout	docusnap	intern	Workstation		
	No				Yes		Other	
	WMWS0254	Succ	eeded	docusnap	intern	Workstation		
	No				Yes		Other	
	WMWS0333	Succ	eeded	d	for the same	TAT to		

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 <u>filter in the main window</u>.

Set Filter					4.
regex:^((WMWS0	03 🛃	•	-	<b>•</b>	
Name	Compare Operators: > , <	, < > , =	ain	Туре	Description
WMWS0032	Character String	•	snap.intern snap.intern	Workstation Workstation	
WMWS0004	WMWS0032     WMWS0064     WMWS0064     WMWS0113     WMWS0254     WMWS0333     WMWS0610     WMWS0944     Apply Cancel	▲	snap.intern	Workstation	

#### 9.2.7 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. Inserting PDF files, however, only works to a limited extent. After a PDF file has been inserted, it will be displayed, but not with its correct formatting. XML files are imported as readable plain text.

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 IT 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 the IT concept.

#### 9.2.8 Map

Maps can also be integrated into an IT concept.

Click the *Map* button in the *Insert* ribbon to open the *Select Map* dialog. Here, you can select a map by expanding the IT Documentation 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 <u>IT Documentation</u> section. The settings you specify in the wizard are only used to create this map within the IT concept. They do not affect the maps generated previously in the *IT Documentation* 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.

Select	Мар	9	6.1	
	Documentation         Docusnap Inc         Image: Network Map         Image: Topology Map </td <td></td> <td></td> <td></td>			
	Insert		ancel	

### 9.2.9 IT Relation

Relations created in the *IT Relations* module can also be integrated into an IT concept.

Click the *IT Relation* button on the *Insert* ribbon to open the *Select IT Relation* dialog. There, you can select an IT relation from the *IT Relations* explorer. To add the IT relation to your concept, select it and click the *Insert* button.

5	Select IT Relation		٩	6.1
	IT Relations Docusnap Inc			
		Insert	<u>C</u> ar	ncel

#### 9.2.10 Datasheet

Overviews and datasheets can also be embedded into an IT 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 <u>Documentation</u> 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 *IT Documentation* 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.

#### 9.2.11 Placeholder

Using placeholders, you can identify the locations where particular information is to 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 be 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.

Insert Placeho	older	6.1
Element Type:	Data	-
Action Text:	Workstations	
Object Filter:	Workstations	Select
Description:	Insert Workstations	
		<u>OK</u> <u>C</u> ancel

# **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.

# IT Concept

🕹   🖥 🗳 (~   Close	Operations Manual.dsc - IT-Concept Editor	_ # X
General Insert Page Layout		
Save Refresh Export Print General	F → A       Cambria → 11 → 'T: I:	
E Data Explorer		⊿ latiab
Documap Inc     Contacts     Contacts	Image: Contract of the second seco	
Document Outline Objects	1/1   1/1   1   20     NUM   100 % — 1	+
Tasks		4
Description		
Insert Workstations	Wokstaio	ns

### 9.3 Versions

To save an IT 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 IT concept node in the Docusnap tree view. You can also enter an additional description. This description is displayed behind the version.

For each IT 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. To exclude a version from deletion, you can click the *Keep Version* 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.

## 9.4 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 IT Concept Template* dialog. Enter a name for the template in this dialog. The template will then be saved to the *ITConceptTemplates* folder under the folder specified in the local settings or in the team settings. To make the templates available to multiple users, you need to select the same folder for the team settings.

The template is created for the language in which the concept was written. After entering the name, you can save the template which will then be available when creating new concepts.

anguage: English		•			
elect Template					
Name		Date Created	Date Modified	Size	
Emergency Manual		3/26/2013 1:52:15 PM	3/26/2013 1:52:16 PM	5.52 kB	
📴 Recovery Plan Server		3/26/2013 1:55:39 PM	3/26/2013 1:55:39 PM	5.5 kB	
lame: Recovery Plan Workstatio	on				

# Manage IT Concept Templates

Existing templates can be deleted from the *Manage IT Concept Templates* dialog that can be opened by clicking *Templates* from the *IT 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.
anage IT Concept Template	s		
nguage: English	<b>•</b>		
lect Template			
Name	<ul> <li>Date Created</li> </ul>	Date Modified	Size
Emergency Manual	3/26/2013 1:52:15 PM	3/26/2013 1:52:16 PM	5.52 kB
Recovery Plan Server	3/26/2013 1:55:39 PM	3/26/2013 1:55:39 PM	5.5 kB
Recovery Plan Workstation	3/26/2013 1:56:51 PM	3/26/2013 1:56:51 PM	5.53 kB
Open emplate Description			
Delete Save			
			Clar

# 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 *Select 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 IT Concept Concept Name: Windows Select Template Emply Document Recovery Plan Server Recovery Plan Workstation Recovery Plan Emergency Manual Recovery Plan Emergency Manual	Language:       English         Template         Image:       Recovery Plan         Image:       Image:         Image: </th
Template Description	Create     Create     Cancel

# 9.5 Designs

The design selected in the *Designs and Styles* dialog will be used for the IT 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 IT concept.

Designs and Styles					Ø8a <mark>6.1</mark>
IT Concepts		(	Designs		Template
	Use Company [	)esigns			Docusnap AG
	Black	Red	Red-Orange	Orange	docusnap.intern
	Valley Oren	Mallaw	Valley Crear		Microsoft Windows Server 2008
	Yellow-Oran	Yellow	Yellow-Green	Green	Name SMEX0003
	Blue-Green	Blue	Blue-Violet	Violet	SMII0001 SMII0002
	Red-Violet	Grey	Sky Blue		SMRA0001
					<u> </u>

# 9.6 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 <u>Table of contents</u> and for the entries in the <u>Document Outline</u> 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.

Change Style - N	ormal		6.1
Font Paragraph			•
Font: Camb	ria [	•	
Font Size: 11	[	•	
[][	ormatting	(Col	or
Bold	Italic	Text:	•
Underline Underline	Strikethrough	Text Highlight:	
		<u>0</u> K	<u>C</u> ancel

# 9.7 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 IT concept to.

Export Conc	ept		6.1
Concept Name:	Operations Manual		
Export Path:	C:\Docusnap		
Refresh Doci	ument before Export		
	Select Format		
Microsoft V	Vord 2007 - 2010 (*.docx)		
Microsoft V	Vord 97 - 2003 (*.doc)		
Adobe PDF	-Document (*.pdf)		
PDF/A-Doo	ument (*.pdf)		
HTML-Doc	ument (*.html)		
Rich Text F	ormat (*.rtf)		
		<u>Export</u>	<u>C</u> ancel

When creating an IT concept, you can also use the Scheduling feature. Click the *Schedule as Job* button on the IT Concepts ribbon to launch the Documentation wizard.

For an description of the basic steps in this wizard, refer to the <u>Basic Steps</u> section of the Documentation chapter. In the *IT Concept* step, proceed as follows:

Under *Export Formats*, select the file type to which you want to export the concept. From the *Available IT Concepts* table, you select the IT concepts to be exported. The table lists all existing IT concepts.

Documentation			A.1
Company Selection	Create IT Concept		
Scheduling	PDF Ø DOC Ø DOCX Ø	(Export Formats)	
		Available IT Concepts	
	DR Virtualization	3/19/2013 2/19/2013	
	B Risk Assessment Server	3/19/2013 3/19/2013 3/19/2013	
	Operations Manual	3/26/2013	

For proper scheduling, specify a name, the schedule type, the interval, the number of recurring executions, the starting date and time. Furthermore, the <u>Docusnap</u> <u>Server</u> must have been configured successfully. For more information on *Automatic Scheduling*, refer to the <u>Scheduling</u> chapter.

Documentation	6.1
Company Selection	Schedule Task
	Common Settings
	Name: Operations Manual Every Week on Monday at 8:00:00 AM. Schedule will be used on 3/1/2013.
	Type: Recurring 🔽
	(Frequency)
	Interval: Weekly
	Recurring every: 1 🗰 Week(s) on: 🖉 Monday 🗍 Wednesday 💭 Friday 💭 Saturday
	🗌 Tuesday 🔲 Thursday 💭 Sunday
	One-time at: 08:00:00
	End: 23:59:59 📮
	Duration
	Start Date: 3/1/2013 T = O End Date: 3/26/2013 T =
	No End Date:
	Job Management
	Database Type: SQLServer
	Server: SDEVSQL01
	Docusnap Server: WKNE0015
	Status: started
	Back     Einish     Cancel

# 9.8 Assignment

The *Assign* button in the IT Concept ribbon allows you to insert existing concepts and directories at any desired position in the Explorer. To assign an IT concept, select it and click the *Assign* button to open the following dialog.

Assign IT Concept	6.1
Existing Meta Objects	
Data Explorer	
Docusnap Inc	<b>^</b>
⊡ ··· □ & Contacts	
🖻 🖳 🔩 IT Environment	
🖃 🛄 👥 docusnap.intern	
🖶 🔲 👥 rd.docusnap.intern	
🖬 🔲 🍓 Workstations	
🕀 🔲 🔰 Servers	=
🖶 🔲 🐉 Linux	
🕀 🔲 🖳 Mac	
🕀 🔲 💇 SNMP Systems	
🖶 🗆 🎹 CIFS	
🕀 🗆 🔜 Systems	
🗄 🗆 🔲 🗽 System Groups	
🕂 🗆 😹 IP Systems	
🖶 🗆 🔲 🔛 ADS	
🕀 🔲 👯 Network Services	_
	•
<u>S</u> ave	<u>C</u> ancel

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.

# 9.9 Conversion

For Docusnap version 6.1, a new IT concept was developed. To reuse IT concepts created in Docusnap 6.0, you need to convert them. If legacy IT concepts or IT concept templates exist upon startup of Docusnap 6.1, they are suggested in the *Upgrade Wizard* for conversion.

From the *IT Concepts* tab, you can select the IT concepts to be converted. From the *Templates* tab, you can select the templates which still exist in the Docusnap 6.0 format for conversion. The IT concepts will be stored in the folder specified for IT concepts in the Options dialog.

Click the *Start* button to start the conversion.



# 10 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 <u>data</u> <u>import</u>.

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 IT concepts, IT relations, reports, and maps.

# **10.1** IT Assets Structure

Click the *Manage IT Assets* button in the *Management* ribbon to open the *Manage IT Assets* dialog. Use this dialog to create the structure of your IT assets. Userdefined Structures are prefixed with a lowercase x.

# Categories

Click the *New* and select *Category* to create a new category. You can enter a name and labels in English and German for the category. You can also enter a description in both languages. Below any category, you can create IT assets or subcategories.

Manage IT Assets		o© 6.1
🤗 New マ 🔚 Save 🔲 Delete	Category	
Infrastructure  Building  Building	Name: Mobile Phones	
Cabling      Server Room      General	German Text: Mobiltelefone English Text: Mobile Phone	21
Hardware ⊟-⊡IT Systems	Description:	*
POS Systems	· · · · · · · · · · · · · · · · · · ·	Ŧ
Hones Hones Hone Hone Hone Hone Hone Hone Hone Hone Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Hones Ho		
Grie Windows Phone		
HTC ⊕··· <b>#</b> Samsung □ □ □ □ □ □ □ □ □ □ □ □ □ □ □ □ □ □ □		
Blackberry		
🖶 🧧 Samsung Galaxy Tab 🕀 🛲 Windows Surface		
ter 🛃 Irad		
		Close

#### Class

Click *New* and then *Class* to create an IT asset under the selected category node. You can enter a name and labels in English and German for the IT asset. Docusnap suggests a particular icon for each *class*. You can change this icon using the button. By unchecking the *Active* checkbox, you can deactivate the class so that it is no longer selectable when you create new IT assets. In the display field, select the property whose value should be displayed in the tree view. After you have saved the class, Docusnap creates the *General* tab and the *General* section. Subclasses may be created under each class.



# Tab

In addition to the *General* tab, which is created for each class and which cannot be deleted, you may create other tabs. These will be displayed as additional tabs when you create IT assets. Besides the name, you can enter labels in English and German for each tab. The *Active* checkbox allows you to enable/disable the tab.



#### Section

For each class, Docusnap creates a *General* section. You can rename or delete this section. Sections are used to group the properties of the IT assets in the editor area. You can enter a name and labels in English and German for each section. The *Active* checkbox allows you to enable/disable the section. The *Column Formats* allow you to define how to arrange the properties in the editor area.



# Properties

Properties are used to specify values for the IT assets. Create the properties under the desired section. Click the *New* button and select *Property* to define new properties. You can enter a name and labels in English and German for each property. The *Active* checkbox allows you to enable/disable the property. Various property types are available:

- Date: If you select the *Date* type, a date selection for specifying the date will be provided in the editor area.
- Decimal: If you select the *Decimal* type, only decimal numbers can be inserted into the text box.

In addition, you can set a factor for the conversion of numeric values. Example: A factor of 1024 would convert a value from bytes into kilobytes.

Here, you can define the formatting of numeric values according to standard conventions. Valid placeholders are the # character for any numeric value and the

digit 0 for numeric values which are padded with leading zeros if they are too small. The comma is used as the thousands separator, and the period as the decimal separator. Examples: #,##0.00 MB, 00 h

- Yes/No: For a property of the *Yes/No* type, a checkbox will be displayed in the editor area.
- List: If you select the *List* type, you can use the *List Values* button to define entries which will subsequently be selectable in a drop-down list in the editor area.
- Multi-Line Text: If you select the *Multi-Line Text* type, you can enter text without any length limitation. For this type, you can specify the height of the text box in the Line *Height* field.
- Network Information: If you select the Network Information type, you can specify the IP Address, the Subnet Mask, and the MAC Address for this IT asset. This information can then also be added to the network maps.
- Text: If you select the *Text* type, Docusnap will display a text box in the editor area.
- Number: If you select the *Number* type, the text box will only accept integers. In addition, you can set a factor for the conversion of numeric values. Here, you can define the formatting of numeric values according to standard conventions.
- ADS Assignment: With the type ADS Assignment users or groups from the ADS inventory can be assigned to an IT asset. When creating the IT asset the name of wanted user or group can be entered. Once the first letter is typed, the matching entries are suggested. Users and groups can be added via enter key or selection via the mouse from the suggestion list. Click the button to open the dialog for the advanced search. In this dialog the selection of users and groups can be filtered by several conditions. Afterwards the selected user or group can be assigned to the IT asset. You find further information on the filter in the chapter <u>Permission Analysis</u>.
- Number Server: The number server can be defined in the Advanced ribbon and can be used to assign a continuous number to every new generated IT asset. In the Settings an existing Number Server can be chosen, when you select the type Number Server. You find further information on the definition of Number Servers in the configuration manual.



You can move classes and categories or change the order in which the properties are listed in the editor area by drag&drop.

# **10.2** Create IT Assets

IT assets are created from the Data Explorer. 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 <u>Data Import</u> 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.

# **10.3** Other Inventory

Docusnap 6.1 enables you to manually create IT assets to create data for equipment which cannot be inventoried automatically. In Docusnap 6.0, these were covered by the Other Inventory type. To centralize the output of these entries, the Other Inventory items will be transferred to the IT assets when converting a Docusnap 6.0 database to the Docusnap 6.1 format.

Inventory items created on the Company level are output as IT assets below the

Account Inventory heading. If inventory was defined on the domain level, a separate IT Assets heading is created for each domain and the inventory is listed under that node.

#### 10.4 Export

You can export the configuration of the IT assets to an external file and then import the configuration data into another Docusnap database.

Click the *Export Schema* button in the *Management* ribbon to open a dialog where you can save the structure of the IT assets to an external file.

You can specify the file to which you want to export the corresponding data in the field at the top of the dialog. Clicking the  $\Box$  button will open a file/path selection dialog. The list below shows the IT asset structures of this database. Click the *Export* button to export all selected categories and classes to the specified file.



# 10.5 Import

Click the *Import Schema* button in the *Management* ribbon to open the dialog for importing IT asset structures.

Each newly created category and class will be assigned a unique ID. Tick the *Overwrite Existing Data* checkbox to overwrite the existing data if, upon the import

of a category or class, Docusnap detects that the respective item already exists. In case a category or class with an identical name exists, you can define a postfix. The specified postfix will be appended to the name of the category or class using an underscore (\_).

In the Select IT Assets table, you can select the IT assets to be imported. Start the import by clicking the *Import* button.

IT Assets - Import Definitions					oQ 6.1
		Select File	•]		
File Name:	C:\Docusnap\ITAssets.dsu	I			
		Existing Obj	ats		
Postfix for Existing Name:	odl	( <u> </u>			
Overwrite Existing Data					
		Select IT Ass	ete		
Name		Active	Type		
E- Z C xMobiles		Yes	Category		
xLumia		Yes	Class		
xApps		Yes	Class		
□ I I I I I I I I I I I I I I I I I I I		Yes Yes	Category Class		
				1	
					mport <u>C</u> lose



# **11** Docusnap Server

The server component of Docusnap allows you to fully automate some 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. Once the Scheduling feature has been enabled in the *Option* dialog (see <u>Options</u>), an additional Scheduling step is added to the inventory and documentation wizards (see <u>Scheduling</u>). 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 <u>Job Management</u>).

For Docusnap 6.1, the Docusnap Server Administration dialog was integrated directly in Docusnap in order to centralize control and configuration.

# 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<u>Configuration\_wizard</u> in Docusnap. 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.



Since Microsoft Access databases tend to cause problems in network operation, we recommend to rely on Microsoft SQL Server databases.

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.

# **11.1** Configuration

Click the *Configuration* button in the *Docusnap Server* group of the *Management* 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*.

Configuration		o) الأربي 6.1
😚 Server Start Settings	Configure Docusnap Serv	er:
🎨 Server Database		General
💮 Server Mail Settings	Startup Type:	Automatic
Server Settings		
		Change Server Login
	User:	
	Password:	
	Execute Inventory in O	Iwn Process
	Remark: If no user and pa permissions for the databa	assword is entered, Docusnap Server uses the local system account. If the system account doesn't have ase, Docusnap Server exits with an error.
		Debugging
	Enable Debug Mode	
	Debug Level:	Log everything
	Target Storage Location:	Database   Reset Log
		<u>N</u> ext Cancel

It is also possible to specify a user, who is used for the execution of the service.

Configuration	¢¢	6.1
🚱 Server Start Settings	Configure Docusnap Server:	
🍖 Server Database	General	
🎡 Server Mail Settings	Startup Type: Automatic	-
💮 Server Settings		
	Change Server Login	—
	User: docusnap\administrator	
	Password:	
	Execute Inventory in Own Process	
	Remark: To start the inventory in an own process, the local security policy 'Replace a process level token' is required for the specified user. For further information, refer to the help manual (F1).	d
	Debugging	—
	Enable Debug Mode	
	Debug Level:	
	Target Storage Location: Database Reset Log	
	Next Ca	ncel



In order to execute a correct inventory, the local security policy *Replace a pocess level token* must be set for the specified user.

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.

🖥 Local Security Policy		
<u>File Action View H</u> elp		
🗢 🔿 🙋 📆 💥 🗒 🗟 🚺		
🚡 Security Settings	Policy A	Security Setting
🛨 📴 Account Policies	📓 Change the time zone	LOCAL SERVICE, Administrators
E 🔓 Local Policies	🖾 Create a pagefile	Administrators
🕀 📴 Audit Policy	🔯 Create a token object	
Germine Online	🔯 Create global objects	LOCAL SERVICE, NETWORK SERVICE, Administrators, SERVICE
Security Options     Windows Fixewall with Advanced Security	🔯 Create permanent shared objects	
Network List Mapager Policies	📓 Create symbolic links	Administrators
	📓 Debug programs	Administrators
Software Restriction Policies	Deny access to this computer from the network	
Application Control Policies	🔯 Deny log on as a batch job	
표 🛃 IP Security Policies on Local Computer	📓 Deny log on as a service	
🕀 📋 Advanced Audit Policy Configuration	Big Deny log on locally	
	in Deny log on through Remote Desktop Services	
	Enable computer and user accounts to be trusted for delegation	
	General Force shutdown from a remote system	Administrators
	Generate security audits	LOCAL SERVICE, NETWORK SERVICE, Classic .NET AppPool, Defau
	Impersonate a client after authentication	LOCAL SERVICE, NETWORK SERVICE, Administrators, IIS_IUSRS, S
	Increase a process working set	Users
	Increase scheduling priority	Administrators
	Load and unload device drivers	Administrators
	Lock pages in memory	Administration Declary Operations Declary and Log Harry WC 711
	Log on as a batch job	Administrators, Backup Operators, Performance Log Users, 115_10
	Log on as a service	NT SERVICE(ALL SERVICES, DOCUSINAP(Administrator, DeraultAp
	Madify an abject label	Administrators
	Modify firmulare opuireprophysics	0 dministrators
	Berferm volume maintenance tacks	Administrators
	Brofile single process	Administrators
	Drofile system performance	Administrators
	Bemove computer from docking station	Administrators
	Reniove computer from docking station	NETWORK SERVICE LOCAL SERVICE DOCUSNAD\ Administrator
	Restore files and directories	Administrators. Backup Operators
	Sput down the system	Administrators, Backup, Operators
	Synchronize directory service data	
	Take ownership of files or other objects	Administrators
۲. (F)		
	,	

# Server Database

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

If you run multiple Docusnap Server instances, the following rules apply:

- If multiple *Docusnap Servers* connect to the same database, the jobs will be executed by the server component which had been first to register with the database.
- If you terminate the *Docusnap Server* which had registered first, the jobs will be performed by the Docusnap Server which had been second to register.



Since Microsoft Access databases tend to cause problems when used in a network, we recommend to rely on Microsoft SQL Server databases.

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.

configuration			ංරී වි
Server Start Settings	Please select a database type:	SQL Server Database O Access	s Database
Server Database		Microsoft SQL Server Database	e)
Server Settings	SQL Server: sdevsql01	Authentication:	SQL Server-Authentication
Conton Cotanigo	Database: DocusnapDatenbank	User Name:	sa
	<b>—</b> —	Password:	Connect Create
		Status	
	Activity	Progress	Status
	Checking Basic Data		Basic data updated successfully
	Checking Type Data		Type data updated successfully
	Checking Settings		Settings updated successfully
	Checking SNMP Schema		SNMP Schema updated successfully
	Checking ADS Schema		ADS Schema updated successfully
	Query Timeout in Seconds:	Settings	
		Encryption Module	
	Encryption: ODisabled	Select existing File	O Create new File
	Encryption File: C:\Docusnap\Do	cusnapCrypt.dcr	
	Database opened successfully		Back Next Canc

# 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.

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.

Configuration		<u>ېڭ</u> 6.1
🍖 Server Start Settings	Configure Em	ail Settings:
Server Database		SMTP Settings
Server Mail Settings	SMTP Server:	eMailServer01.docusnap.intern
Server Settings		Server Requires Authentication SSL Encryption SMTP Port: 25-
		External Email Provider     Authentication
	User:	admin
	Password:	xeox
		(Sender)
	Sender:	DocusnapServer@docusnap.com
		Check Settings
	Test Address:	info@docusnap.com Check Sgttings
		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. Docusnap will use the path selected for the *Team Settings*, it specified. 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 <u>IT concepts</u> you created are saved under the IT Concept 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 neither path is available at the time when the job is processed, Docusnap will use the templates from the program directory.

Configuration		ġ	6.1
Server Start Settings	Define Docusnap Server Settin	ngs:	
<ul> <li>Server Database</li> <li>Server Mail Settings</li> </ul>	Occumentation Path:	Documentation	
Ge Server Settings		Settinas	
	Local Settings:	C:\Docusnap\Settings	
	Team Settings:	ENTD	
		<u>B</u> ack <u>Next</u>	<u>F</u> inish

Click the *Finish* button to apply the settings and start the Docusnap Server.

# **11.2** Job Management

The Job Management feature in Docusnap provides advanced management options for your jobs. Click the *Jobs* button in the *Management* ribbon, to open the dialog for organizing and editing jobs.

This dialog displays all jobs defined for the database selected in Docusnap. The *Scheduled Jobs* list shows the scheduled jobs including the most important details, such as Type, Creation Date, Last Execution. If the job has been executed before, its results will be displayed in the *Job Details* group.

The *Cancel, Delete*, and *Start Now* buttons to the right of the *Schedule Jobs* list allow you to manage the configured tasks. You can abort an active job by clicking the <sup>Cancel</sup> button. To delete a job from the database, select it and click the <sup>Schedule</sup> button. Clicking the <sup>Start Now</sup> button immediately starts the selected job, provided that no other job is currently in progress. When you click the <sup>Ledit</sup> button, the scheduled job will be opened in its associated wizard where you can edit it.

# 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 substant button in the Server Status bar.

The Server Status pane 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.

ob N	lanagement		-					60 0
Scheduled Jobs (4 total)								
	Job Status	Name	Туре	Progress	Creation Date	Last Execution	Next Execution	Filter
	executing	Windows Inve	Inventory	43%	27.02.2012 10:31:58	21.06.2013 10:00:02	21.06.2013 16:31:45	📰 Enable Filter
G	planned	Network Inven	Inventory		27.02.2012 10:32:43	21.06.2013 09:59:52	21.06.2013 20:00:00	Apply Filter
D	executing	Create Datash	Documentation	58%	27.02.2012 10:33:23	21.06.2013 10:00:02	21.06.2013 21:00:00	Remove Filter
۲	stopped	AD Inventory	Inventory		27.02.2012 10:33:57	27.02.2012 13:00:00		Other
								Excel Export
								Controls
								Cancel
								Delete
								Eur
								Start Now
					Job Details			
V					Server Status			*
					Database	Type: SQLServer		Stop
					Database	: Docusnap		🚯 Restart
					Server:	SDEVSQL01		
			Sonier WKM	20015				
		Status:	starte	1				
				_				

# 11.3 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 environments.

# 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 and overviews can be created automatically in the documentation process. This, however, does not apply to the creation of Visio maps.

# **IT Concepts**

The server also allows the time-controlled creation of IT concepts.

#### Notifications

The <u>Notification</u> 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 to the selected format.

#### **Docusnap Connect**

It is also possible to schedule the export of data to SQL databases, XML files, or CSV files.

# 11.4 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 <u>Configuration</u> 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.



# 12 Docusnap Connect

Data from Docusnap can be exported and made available for processing in other applications.

You can either export the data to an SQL database or save it as an XML or CSV file.

# Configuration

In the table configuration dialog, you can specify the data to be exported.

When you create a new database or update a Docusnap 6.0 database to Docusnap 6.1, a package for HelpLine is generated. It contains data on the systems inventoried by Docusnap that can then be processed by HelpLine.

# 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

You can export your configurations and then import them to another database.

# 12.1 Configuration

In this first step, you will define the data to be exported.

Click the *Configuration* button in the *Docusnap Connect* group of the *Management* ribbon to open the configuration dialog for Docusnap Connect packages.

To create a new package, click the *New* button. For each package, an English and a German name must be assigned. In addition, you can enter a description. Enable the *Active* checkbox to make the package available in the Scheduling wizard.

By clicking the *Edit* button, you can open the package configuration dialog.

Docusnap C	onnect			фØ	6.1
Title	Active				
HelpLineEx	port Yes				
🛒 WindowsSy	st Yes				
Title:	HelpLineExport			Act	ive
German Text:	Helel in Furert	English Text:	Helpl ineEvport		
Goman rext.		Linghon Fox	Порелосярок		
Description:	HelpLineExport	Description:	HelpLineExport		
<u>E</u> dit		Ne	ew <u>D</u> elete	<u>S</u> ave	
				<u>C</u> los	e

# **Configuration of Docusnap Connect**

The tree structure displays all entries from the Data Explorer. Tick the checkbox to the left of each table that you want to select for export. The selected tables are listed in an overview table at the bottom of the dialog.

To export multiple tables, click the *New* button to add more tabs where you can configure the data for additional tables.

Enter the name to be assigned to the table after the export in the *Table Name* (*Target*) field.

- Column: By double-clicking a field in the *Column* list, you can display the columns of the selected table. Select the desired column there. If you no longer need a column, you can remove it by either selecting *Delete* from the context menu or select the line and press the *Del* key on your keyboard.
- Alias: In the Alias column, you can specify the name of the column in the exported table.
- 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 in the *Manage Tables* dialog, 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). The clause can further be extended by additional fields or conditions. To hide the column used for filtering, you can disable the *Display* checkbox for this column.

Docusnap Connect 6.1								
Yew 🔍 Preview Windows Ho	sts × Software	×					•	
Table Name (Target): Windows Hosts				Table Name	e Filter Meta Object			
🖃 🔲 🌉 Company		<b></b>	-	VRAM	Company.Domain.Workstations.Workstation Scans.RAM			
🖅 🦀 Contacts		=		VRAM	Company.Domain.Se	rvers.Server Scans	.RAM	
🖻 👊 IT Environment				tDocuWindows	Company.Domain.Se	rvers.Server Scans	General	
Domain			1	tHosts	Company.Domain.Se	rvers		
- Workstations			1	tDocuWindows	Company.Domain.W	orkstations.Worksta	ition Scans.General	
🖃 🔲 🔐 Workstati	on Scans			tHosts	Company.Domain.W	orkstations		
⊖- ♥ General □ ♥ ⊕ ⊕ ⊕ ⊕ ⊕ ⊕ ⊕ ⊕ ⊕ ⊕ ⊕ ⊕ ⊕ ⊕ ⊕ ⊕ ⊕ Software ⊕ - ♥ Hoffware	eatures	•						
Column	Alias	Display		Reference	Sort Order	Grouping	Filter	
vRAM.Capacity	Capacity	1			4	Sum		
tHosts.HostName	HostName	1			1			
tHosts.Online	Online		5	7	2		= 1	
tDocuWindows.0S	OS	1			3			
tHosts.HostID	HostID	1			0	Group		
		J			0			
Save Close Cancel								

Once you have selected the tables and columns, you can click the *Preview* button to check the table output. By default, the first ten table records are shown in the preview. You can change this value in the *Limit Data Rows to:* field.

usnap C	onnect Pre	view				¢0
Data Rows t	o: 1	0	Refresh			
-fluere (101	-					
ortware (101	Lnmesj					
Windows Hos	ts (10 Entries)					
HostID	HostName	Online	os	Capacity	ONC	
27	WBWS0128	Succeeded	Microsoft Windows 7 Enterprise	2147483648	[1,1]\[1,2]\[2,4]\[2,5]\[27,6]	
9	WMWS0944	Succeeded	Microsoft Windows 8 Enterprise	4294967296	[1,1]\[1,2]\[1,4]\[1,5]\[9,6]	
10	WMWS0610	Succeeded	Microsoft Windows 7 Enterprise	273804165120	[1,1]\[1,2]\[1,4]\[1,5]\[10,6]	
11	WMW\$0333	Succeeded	Microsoft Windows 7 Enterprise	2147483648	[1,1]\[1,2]\[1,4]\[1,5]\[11,6]	
30	WMWS0032	Succeeded	Microsoft Windows 7 Enterprise	1073741824	[1,1]\[1,2]\[1,4]\[1,5]\[30,6]	
17	WMWS0064	Succeeded	Microsoft Windows 7 Enterprise	1073741824	[1,1]\[1,2]\[1,4]\[1,5]\[17,6]	
12	WMWS0254	Succeeded	Microsoft Windows 7 Enterprise	1073741824	[1,1]\[1,2]\[1,4]\[1,5]\[12,6]	
16	WMWS0113	Succeeded	Microsoft Windows XP Professional	402653184	[1,1]\[1,2]\[1,4]\[1,5]\[16,6]	
13	WMWS0199	Succeeded	Microsoft Windows 8 Enterprise	2147483648	[1,1]\[1,2]\[1,4]\[1,5]\[13,6]	
20	SBPS0001	Succeeded	Microsoft Windows 2000 Server	536870912	[1,1]\[1,2]\[2,4]\[2,12]\[20,13]	
						2

For the export, an additional column named *PrimaryONC* 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 <u>DocusnapLink</u> when switching from another application to this Docusnap node.

# **Special Features**

# ADS

When exporting ADS users, the system will add another table to the table selected for export. This table, with the \_Values suffix, contains the additional properties of the users, such as account options, first name and last name, etc. The *ADSObjectID* column can be used to establish the corresponding relation.

# IT Assets

When exporting IT assets, the system will also export two tables. The first one contains the values of the IT assets class. The *ParentID* column is used to map an existing hierarchy. The second table, with the \_Values suffix, contains the values of the properties of each IT asset. The *ITAssetID* column is used to establish the relation between the two tables.

# **12.2** Schedule Package

Once you configured your packages, you can export the corresponding data.

Click the *Schedule Package* button in the *Management* 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.

Docusnap Connect			-	<u>م</u> ې 6.1
Export	Export Configurations			
3 Juninary	Configuration: Windows Sy Display Name: Windows Sy	Predefined Instems	Configuration	Delete Save
		Configurat	ion Selection	
	Display Name	Configuration Name	Description	Edit Target
	Windows Systems	Windows Systems		Edit
				<u>N</u> ext Cancel

To open the target configuration dialog, click the *Edit* button.

# **Configuring Docusnap Connect Targets**

You can export data to an SQL database or to a CSV or XML 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.

Docusnap Connect			o\$ 6.1
Target Selection: SQL - Language: English - SQL Server			•
(Micro	soft SQL Server Database)		
SQL Server: SDEVSQL01	Authentication:	Windows-Authentication	-
Database: DocusnapDatabase	User Name:		
	Password:		
			Connect Create
	Options		
Delete all Data before Updating the Table			
OUpdate Data in Target Table			
			Close <u>C</u> ancel

## XML

When exporting data to an XLM 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.

Docusnap Connect		¢	<b>Ó</b> 6.1
Target Selection: Xml - Language: English - XML			•
r'i li findoun Sustano			
Path: C:\Docusnap\Docu			
Create Archive Folder			
{XML Output}			
Plain			
	CI	ose	<u>C</u> ancel

## 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.

Docusnap Conne	ect					o <b>O</b>	6.1
Target Selection: CSV		Language:	English -	CSV			•
		55					
File:	Window	is Systems					
Path:	C:\Docu	usnap\Docu					
	Creat	te Archive Fol	lder				
					Formatting		_
Separate Fields with	1:	;	]				
Text Qualifier:			]				
Column Name in	first Row						
					Close	<u> </u>	el

## 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.

Docusnap Connect	ø <b>©</b> 6.1
Target Selection: Excel - Language: English - Excel ×	•
File	
File: Windows Systems	
Path: C:\Docusnap\Docu	
Create Archive Folder	
	Close <u>C</u> ancel

## 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 32-bit version of the MySQL ODBC driver!

Docusnap Connect			oÖ:	6.1
Target Selection: MySQL - Language: English - MySQL				•
	L Server Database			
Driver. MySQL ODBC 5.2 ANSI Driver	User Name:	admin		
SQL Server: 192.168.100.104	Password:	••••••		
Database: Docusnap	Port:	3306		
			Connect Create	
	Options			
<ul> <li>Delete all Data before Updating the Table</li> <li>Update Data in Target Table</li> </ul>				
			Close <u>C</u> and	cel

#### Summary

The Summary page shows all packages to be exported.

#### Scheduling

By using the <u>Scheduling</u> feature, you can specify that the automatic start of the data export starts at a later time. The Scheduling feature must be enabled in the <u>Options dialog</u>.

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.

# **12.3** 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 *Management* ribbon to open the *Export Docusnap Connect 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.

Exp	ort Docusnap Connect Package		o© 6.1
	Title		
	HelpLineExport		
	WindowsSystems		
		Export	<u><u>C</u>lose</u>



# 13 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.

# 13.1 Wizard

Click the *Data Import (csv)* button in the *Advanced* 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.

Data Import	6.1	
Source	Import Definition	
Target	Select Definition       Table       IT Assets	-
	Extensions 👻	
	Next Cancel	

## 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 an 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.

Data Import							2	6.1
Import	Source							
Target	File		C:\Docusnap\iPhoneL	ist.csv	elimiter			
	Tab: Text Qu	Stop Halifier:	Space	Comma	Dptions	lon 🗍 Othe	r	
		Name	ModelName	SerialNumber	Memory	OSVersion	IMEI	
	•	iPhone_01	iPhone 5	12332423	1 GB	iOS 6	49-015420-323751	
		iPhone_02	iPhone 5	12332421	1.68	056	49-015420-323752	
		iPhone 04	iPhone 5	12332422	1 GB	iOS 6	49-015420-323754	
		iPhone_05	iPhone 5	12332425	1 GB	iOS 6	49-015420-323755	
		iPhone_06	iPhone 5	12332426	1 GB	iOS 6	49-015420-323756	
		iPhone_07	iPhone 5	12332427	1 GB	iOS 6	49-015420-323757	
		iPhone_08	iPhone 5	12332428	1 GB	iOS 6	49-015420-323758	
		iPhone_09	iPhone 5	12332429	1 GB	iOS 6	49-015420-323759	
		iPhone_10	iPhone 5	12332420	1 GB	iOS 6	49-015420-323750	
						<u>B</u> ack	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 Import		2	6.1
Import Source	Target		
Source	Data Explorer Docusnap Inc IT Environment IT Assets Cellphone		
	Back Next	Ca	ncel

## 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 *Target Settings* 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 field and click the *Assign* button to link it. 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.

Page 334

Data Import	_	-	_	2	6.1
Jimport Source	Data Assignment				
<ul> <li>Target</li> <li>Data Assignment</li> <li>Status</li> <li>Report</li> </ul>	CSV Values	Target Settings ICCID Date Display Network Operator Software Number Model Code WLAN Address Bluetooth IMEI Description	Assign Delete Assignment	Assignment Name> Name ModelName> Model Name SerialNumber> Serialnumber Memory> Memory OSVersion> OS Version	
	Ignore Auto-Increment	Import as Update	Reset Assignment Load Assignment Save Assignment	Back Start Can	

# 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.

Data Import		<i>🔄</i> 6.1
Import Source	Update	
Target	Update Sett	tings
🗒 Data Assignment	Update Existing Records	O Add only new Records
🗒 Update	Specify Compa	re Fields
Status	Serialnumber Name OS Version Memory Model Name	
		<u>B</u> ack <u>S</u> tart 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.

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# 14 Docusnap Link

With DocusnapLink, you can switch from external programs to Docusnap and expand the Data Explorer to show a specific node.

To use this feature, start *DocusnapLink.exe*. The Docusnap 6.1 installer places this executable in the *Tools* folder. Two parameters must be passed when starting this program: The first parameter is '-ONC' and the second parameter is the actual ONC path enclosed in single quotes. 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* <u>*Connect*</u> is used.



# 15 Settings

In the next two sections, you will learn about the settings available in Docusnap 6.1. You can find them in the <u>Options</u> dialog and in the <u>Define Company Settings</u> dialog. Section three will discuss data management topics.

# **Options**

In the Docusnap Options dialog, you can specify settings that relate to the entire Docusnap application or to individual areas, such as inventory, documentation, license management or reporting.

# Designs

For some modules such as Reporting, Documentation or IT Concepts, you need to select the design to be used. In the Designs and Styles dialog, you can select a common design to be applied to all modules.

# **Define Company Settings**

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.

# Management

In the Management area, you can define custom types and states. If, for example, you would like to add an additional equipment type named "Beamer" to the *Other Inventory*, you can do so in the corresponding dialog.

# 15.1 Options

As described in the <u>Tools</u> section, you can open the Options dialog from the Docusnap *Tools* ribbon.

Options	ه <sup>ي</sup> 6.1	
J General	General	]
General  Cicensing  Database  Vizards  Additional Tools  Documentation  License Management  Update	General General Settings Database Archive Versions:  General Settings Database Archive Versions:  System Path / Files Cocal Settings: C:\telio GmbH\Docusnap 6 Team Settings: C:\telio GmbH\Docusnap 6 Check-out Path: C:\telio GmbH\Docusnap 6 IT Concept Path: C:\telio GmbH\Docusnap 6	
	Enable Debug Mode      Debug Level: Log everything      Target Storage Location: Database      Reset Log      Disable check for installed Microsoft Office products      QK Cancel	

The Options dialog consists of the following pages:

General
Licensing
Database
Wizards
Additional Tools
Documentation
License Management
Update
General

# **General Settings**

15.1.1

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 <u>Manage Snapshots</u> dialog.

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 toggling the *Password Logging* checkbox, you can enable or disable the password logging functionality.

# 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. If no path has been defined in the *Team Settings* field or if the path no longer exists, Docusnap will use the path defined under *Local Settings*.

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, first load it from the database and then store it temporarily in a local directory. In the *Check-out Path* field, you can specify the path to be used for this purpose.

IT concepts are all stored in the same file path. Use the *IT Concept Path* field to select the directory where your IT concept will be stored. If multiple users access the same concepts, you can select a network drive.

# 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.

Options	ø‡ <mark>6.1</mark>
🛄 General	General
Licensing	General Settings
📙 Database	Database Archive Versions: 4
👔 Wizards	Show Network Plans
Additional Tools	Password Logging
1. Documentation	
License Management	Local Settings:     C:\telio GmbH\Docusnap 6       Team Settings:
	Check-out Path:     C:\itelio GmbH\Docusnap 6       IT Concept Path:     C:\itelio GmbH\Docusnap 6\ITConcept
	Debugging         Enable Debug Mode         Debug Level:       Log everything         Target Storage Location:       Database         Reset Log
	CK Cancel

#### 15.1.2 Licensing

The *Licensing* page of the Options dialog shows information about the license currently in use. By clicking the button, you can load the desired license file. To remove the file, click the Remove button next to it.

In the *Licensed Modules* list, you can see the modules included in the current license. Modules not covered by the license will be automatically disabled in Docusnap. To enable disabled modules, you need to purchase a corresponding license.

The *License Mode*, *License Type*, *Company* and *Address* of the company, as well as the number of licenses for *Windows*, *Linux* and *Mac* systems are displayed on the left side.

Three different *license modes* are available:

- Full version: license without any time limits
- Time-limited license: valid for a certain period of time
- Trial version: time-limited license for trial and evaluation

Two different *license types* are available:

- Multi-license: with this license type, multiple companies can be created.
- Individual license: with this license type, only one company can be created.

The number of Windows, Linux and Mac systems indicates how many systems can be inventoried using this license.

Options				o© 6.1
General	Docusnap License Information			
Licensing     Image: Database	Select License: Docusna	pAG_61_Fullxml		<u>R</u> emove
🕼 Wizards		Licer	nse Information	
Additional Tools	License Mode: Full Versio	n	Licensed Modules	<b></b>
1. Documentation	License Type: Multi Licer	nse	🕑 Viewer	
License Management	Company: Docusnap	AG	Ø Basic Module	
	Street: Franz-Larc	cher-Straße 4	Windows Module	
Copulate	Zip Code: 83088	City: Kiefersfelden	Linux Module	
	Number of Windows Systems:	999999	Mac Module     Section 2010	
	Number of Linux Systems:	999999	Permission Analysis	
	Number of Mac Systems:	999999	Exchange Module	
			Ø VMware Module	
			O DHCP Module	
			ONS Module	
			StarePoint Modul	
			Ginance Module	
			Ocontract Module	•
			-	
			1 г	
	V License check successful			K Cancel

#### 15.1.3 Database

On the *Database* page of the Options dialog, you can specify the database where the data will be stored. Docusnap supports both Microsoft SQL Server and Access databases.

#### 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 following icons indicate the database connection status:





No connection to the database database

Successfully connected to the

Options			¢	6.1
틨 General	Please select a database type:	SQL Server Database     OAcc	cess Database	
Licensing		Microsoft SQL Server Databas	se	
🔰 Database	SQL Server: sdevsal01	Authentication:	SQL Server-Authentication	Ţ
🕼 Wizards	Database: DocusnapDatenbank	User Name:	sa	
Additional Tools		Password:	*****	
0 Documentation			C <u>o</u> nnect Cr	<u>e</u> ate
License Management		Status		
Note Update	Activity	Progress	Status	
	Checking Basic Data		Basic data updated successfully	
	Checking Type Data		Type data updated successfully	
	Checking Settings		Settings updated successfully	=
	Checking SNMP Schema		SNMP Schema updated successfully	
	Checking ADS Schema		ADS Schema updated successfully	
	Checking Metaschema		Metaschema updated successfully	
	Query Timeout in Seconds:	Settings		
		Encryption Module		
	Encryption: ODisabled	Select Existing File	Create New File	
	Encryption File: C:\Docusnap\Docu	usnapCrypt.dcr		
			<u>0</u> K	Cancel

## Access Database

You can select an existing Access database or create a new one.

Options			¢	6.1
🛄 General	Please select a database type:	SQL Server Database	Access Database	
Licensing		Microsoft Office Access Dat	abase	
🔰 Database	Path: C:\Docuspap			
🕼 Wizards	File Name: Docusnap.mdb			
Additional Tools			Se <u>l</u> ect Cr	r <u>e</u> ate
Uocumentation	· · · · · · · · · · · · · · · · · · ·			
License Management		Status		
餐 Update	Activity	Progress	Status	
	Checking Basic Data		Basic data updated successfully	
	Checking Type Data		Type data updated successfully	
	Checking Settings		Settings updated successfully	
	Checking SNMP Schema		SNMP Schema updated successfully	
	Checking ADS Schema		ADS Schema updated successfully	
	Checking Metaschema		Metaschema updated successfully	
				-
	Query Timeout in Seconds:	Settings		
		Encryption Module		
	Encryption: Obisabled	Select Existing File	Create New File	
	Encryption File: C:\Docusnap\l	DocusnapCrypt.dcr		
			<u>0</u> K	Cancel

# **Query Timeout**

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.

## **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.

#### 15.1.4 Wizards

# 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 (Scheduling, Export Settings, etc.).

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.

Scheduling

Using the Scheduling feature, you can specify that inventory and documentation processes will be started automatically at a specific date and time. When you enable this feature, the Scheduling option will be added as the last step to the

Inventory, Documentation, and Script Import wizards. In this step, you can define a scheduled job and save it.

Additional Tools

Additional tools are used to integrate external utilities into the inventory process for Windows systems. You can add these tools on the <u>Additional Tools</u> page of the Options dialog.

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: <u>Software Search</u>).

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.

# **Inventory Settings**

Alternative Windows Inventory

By default, Windows systems will be inventoried using remote WMI queries. If this results in problems, due to, for example, erroneous DCOM settings on the remote system, the system can be inventoried using an alternative method. This involves copying of the <u>DocusnapScript.exe</u> file to the remote system to be executed there. The information retrieved in this process will be saved in the Docusnap database.

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).

- Use Alternative DNS Suffix (Windows Systems)
   To inventory Windows systems with a DNS suffix other than the domain name, Docusnap provides the Use Alternative DNS Suffix feature in the Options dialog.
- 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.

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.

#### • Alternative Method for Scheduled Tasks

To also retrieve the user account data for tasks scheduled with a system that runs under Windows XP or Windows Server 2003, enable the *Alternative Method for Scheduled Tasks* checkbox. This way, the PsExec tool for retrieving the user account data will be executed locally on the system to be inventoried during the inventory process. If you do not enable the alternative method, the data of all tasks will be read in anyway, but without any user account details. For systems running under Windows Vista or a later operating system, this setting does not affect the way scheduled inventory tasks are performed.

#### Alternative Software Inventory

If you enable the alternative method for inventorying software, Docusnap will not access the registry via WMI, but rather directly (using RemoteRegistry).



Only enable this mode if sufficient permissions for access to the remote registry of the Windows system have been granted. If such permissions are missing, scanning the software products may not be possible.

Disable NetBIOS Check

By default, Docusnap checks the NetBIOS name during the authentication for domain login. If the NetBIOS name in the Active Directory configuration does not match the data entered on the Credentials dialog (User Name: NetBIOS\User), logging onto the domain will fail.

If the NetBIOS check has been disabled, NetBIOS names will not be verified.

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.

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.

 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.

# 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.

• Using the DNS or Device Name for SNMP Inventory

If multiple SNMP systems in the network have the same device name, these will be considered as one single device. To avoid this, you can specify that the SNMP Inventory process uses the DNS to find the SNMP systems. If no DNS name has been defined, the system name will be used in both cases.

# **Inventory Settings for Permission Analysis**

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.

# Define RSA Key

Click the *New* button to create a new RSA key or click the *Import* button to import an existing RSA key. The use of this key facilitates the inventory process for <u>Linux</u> devices. This means that, after creating the key, you will have to first perform a Linux inventory scan where you will be prompted to enter your user name and password. When performing a new Linux scan, you will no longer be prompted for the password again. This way, the inventory scan is possible without a password.

Options		oû 6.1		
🛄 General	Settings Inventory and Wizards			
Licensing	Multi-processing			
🔰 Database	Number of Parallel Processes: 30 - Timeout in Seconds 180 -			
🚺 Wizards	Set Scan Mode: LAN V Ping Timeout in Seconds:			
Additional Tools	Show Features in Wizard			
Documentation	Software Search Name Snapshots Import Saved Settings			
License Management	Scheduling Additional Tools Export Settings			
🔊 Undate	Inventory Settings			
	Alternative Windows Inventory			
	Inventory Hidden Software Components  Disable NetBIOS Check			
	Use Alternative DNS Suffix (Windows Systems)			
	Disable CIFS Online Check			
	Synchronized Port Checking			
	Alternative Method for Scheduled Tasks     Use Dedicated Domain Controller			
	Use DNS for SNMP System Name     Use System Name of the SNMP System			
	Inventory Settings for Permission Analysis			
	Limit Folder Levels:			
	Define RSA Key			
	RSA Key: New Import F	Remove		
		Cancel		

## 15.1.5 Additional Tools

Docusnap allows you to execute certain utilities when performing a Windows system inventory scan.

An example of such an additional tool is the *Systeminfo.exe* application. Docusnap will start *Systeminfo.exe* after using the defined arguments after completion of the inventory scan. The result data returned by the tool will be saved in the database.

To add a desired tool, click the *New* button. You can choose the name freely. The name you specify will also be used as the results file name. Enter the name and path of the executable in the *Program Path* field or select it by clicking the .... button. The parameters you specified will be provided to the tool upon execution. Indicate optional parameters by square brackets ("[]").

For the *Type* field, two options are available:

File

When you select *File*, the tool will create a temporary file on the hard disk where the returned results will be saved. When the inventory scan has completed, this file will be imported and saved in the database.

You can use the %targetfile% parameter to redirect the data into a results file. For example: "Systeminfo.exe > %targetfile%" causes the resulting data to be saved in

the results file defined in the text field.

Stream

If you select the *Stream* option, the results from StdOut will be written to the database immediately. In this case, however, the cmd.exe program will be visible for a short time.

In the *Timeout* field, you can indicate how much time the tool may take to complete. If this period is exceeded, the tool will be terminated by Docusnap.

In the *Open with:* file, you can define the program to be used for opening the results file.

Before you can select additional tools for the inventory process, the *Additional Tools* checkbox on the <u>Wizards</u> page of the Options dialog must be enabled.

Options					oÖ 6.1
🛄 General	Additional Tools				
Licensing		N	w Additional Tool		
📙 Database	Name:	Systeminfo	Type:	File Timeout:	10000 ≑
🕼 Wizards	Program Path:	systeminfo.exe	Results File:	systeminfo.txt	
Additional Tools	Parameters:	/S %hostname% [/U %username% /P %pa	Open with:	notepad.exe	•••
Documentation				<u>N</u> ew <u>D</u> elete	<u>S</u> ave
License Management		Act	ve Additional Tools		
Npdate Update	Name	Program	Туре		
	Systeminfo	systeminfo.exe	File		
				<u>0</u> K	Cancel

Docusnap provides the following environment variables:

- %Hostname%, %Computername%
- %lpadress%, %lpadresse%
- %Domainname%, %Domain%, %Domäne
- %Username%, %Benutzer%
- %Password%, %Passwort%

- %Targetfile%, %Zieldatei%
- %Description%, %Beschreibung%
- %Tool%, %Toolname%
- %accountname%
- %accountid%
- %domainid%
- %hostid%
- %docuid%



Exception: single sign-on:

If a user name and password are not required for logging onto the domain in the Authentication step (single sign-on), you should declare the %username% and %password% parameters as optional parameters in square brackets. This ensures that no empty user name or empty password will be used.

Examples:

A:

```
Description: System info

Program Path: system info.exe

Parameters: /S %hostname% [/U %username% /P %password%] > %

targetfile%

Type: File

Results File: system info.txt

Open with: notepad.exe
```

B:

Description:System infoProgram Path:systeminfo.exeParameters:/S %hostname% [/U %username% /P %password%]Type:StreamResults File:systeminfo.txtOpen with:notepad.exe

#### 15.1.6 Documentation

In the *Documentation Path* field, you can specify the location where documents (overviews and data sheets) will be stored when the program creates the documentation. Click the  $\Box$  button to select the folder for storing the documents.

# **General Settings**

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 <u>Documentation</u> 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.

## **Network Map**

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. If additional tools were used when inventorying Windows systems, the results file can also be linked with the Visio maps.

Exclude VMware Adapter: 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 display the network map preview. You can change the setting there, too.

# Datasheets

Datasheets contain a summary of the data for Windows, Server, Linux Mac, and SNMP systems. For each device, a separate data sheet 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.

Comments can be created for all devices. In addition, you can add files as attachments to the comments. The comments will be shown on the datasheets if the *Export Comments* checkbox is enabled. If you also check the *Export Attachments* 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.

## VMware Map Settings

In this group, you can specify the VMware maps to be created by default in Docusnap. (For more information, see <u>VMware Maps</u>.)

Options	¢0	6.1
General	Documentation Settings	
Licensing	Storage Location of Documentation results	
🔰 Database	Documentation Path: C:\Docusnap\Docu	
🕼 Wizards		
Additional Tools	General Settings	_
Documentation	Font: Verdana 🔹 🗹 Document Archive Versions Limit: 4	
License Management	Link Documents: 🛛 🕼 Create Additional Reports	
👌 Update	Network Map Settings	
	Link Documents: Visio Word Excel Link Additional Tools Results	
	HTML ODT PDF Exclude VMware Adapter	
	Datasheet Settings	—
	Ust HTML Documentation Word PDF Export Additional Tools Results	
	If HTML If Excel ODT Export Comments	
	Print Preparation (MDC) Restrict Output Formats (HTML; XLSX) Export Attachments	
	Image Resolution: 300 🚽 dpi Image Quality: 😑 🕂 🖓 🕀	
	VMware Map Settings	
	Host to VM     VM to Network	
	Host to Network	
	Host to Data Store	
		ncel

# 15.1.7 License Management

If you wish to exclude the software products for a certain operating system from license management, you can clear the *Include Linux Software Products, Include Mac Software Products* and *Include Unknown Software Products* checkboxes.

Options		ф	6.1
関 General	License Management		
🚯 Licensing	Include Software Products		
🔰 Database	Include Windows Software Products		
🕼 Wizards	Include Linux Software Products		
Additional Tools	☑ Include Mac Software Products ☑ Include Unknown Software Products		
1. Documentation			
License Management			
2 Update			
		Car	ncel

#### 15.1.8 Update

# **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 on the *Help* ribbon.

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.

Options					- 00	6.1
📜 General	Update					
Licensing			(Hadata Ostiana)			_
🔰 Database		_				_
🎼 Wizards	Check:	Check for Updates on Startup	Timeout	: 3 Seconds		
Additional Tools			Proxy Server			—
1. Documentation						
License Management	Address:		Port:	8080		
🔄 Update	User:		Passwor	rd:		
				<u>D</u> K	Car	ncel

## 15.2 Designs

For some modules such as Reporting, Documentation or IT Concepts, you need to select the design to be used. In the Designs and Styles 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.

#### 15.2.1 Designs

On the Designs page, you can select one of several predefined designs. The design you select here will be applied to reports, datasheets and maps. The selected design will determine the colors used in the IT concepts you create.

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.

Designs and Styles		Qa, <mark>6.1</mark>
Designs	(Designs)	Preview
Reports	Black Red Red-Orange Orange	Docusnap AG
Edit Designs	Yellow-Oran Yellow Yellow-Green Green	docusnap.intern Microsoft Windows Server 2008
Report Styles	Blue-Green Blue Blue Violet Violet Red-Violet Grey	Name         SMEX0003         SMI0001         SMI0002         SMRA001
	I	<u> </u>

#### 15.2.2 Report Settings

Using the *Show Cover, Show Header* and *Show Footer* checkboxes, you can specify whether those report elements will be included in the report.

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.

Designs and Styles	Ę.	los 6.1
Designs	Options Show Cover	
Edit Designs	Show Footer	
Report Styles	German: Master Design	
	English: MasterDesign	

#### 15.2.3 Edit Designs

You can add to the predefined designs by creating your own designs. Click the *New* button to create a new design for which you need to specify a name in English and German. You can then define colors for the various levels of your design. Click the *Save* button to save the design.

To use a custom design, you need	to select it on the <i>Designs</i> page.
----------------------------------	------------------------------------------

Designs and Styles			@®s <mark>6.1</mark>
Designs		Editable Designs	]
Reports	Sky Blue		Save Delete
Edit Designs			New
Report Styles			
		Edit Design	Preview
	Name German:	Himmelblau	Docusnap AG
	Name English:	Sky Blue	docusnap.intern
	Color Level 1:		Microsoft Windows Server 2008
	Color Level 2:		Name SMEX0003
	Color Level 3:		SMII0001 SMII0002
	Color Border:		SMRA0001
	Color Background:		
			<u>QK</u> <u>C</u> ancel

#### 15.2.4 Edit Styles

On the *Report Styles* page, you can modify the formatting of each style or create new styles.

You can define text settings, border settings, and colors for your styles. The settings are saved for the style that is currently selected in the dropdown list. If desired, you can apply the selected font to all styles. For the border, you can set the type and the border style to be applied.

The color can be set to the various shades available for the selected design. A shade set as the color for the text, the background, or the border will still be used when you select another design. The color defined through the drop-down list will also still be used when you select another design.

To save modifications to existing styles, click the *Apply* button. Clicking the *Load Default* button deletes all custom styles and restores the original design settings.

Click the *New* button to create a new style. After assigning a name for the design in English and in German, you can save the style and then define its formatting.

Designs and Styles			Øø <sub>8</sub> 6.1
Designs	Component Style		General
Reports	Cover_Title German Name: Titelblatt_Titel	•	Preview
Edit Designs	English Name: Cover_Title		
Report Styles	Save New	Delete	Apply Load Default
	Text Settings		Border Settings
	Apply Font to all Styles	Se	olid 🗨 1 🛓
	Calibri 🔹	24 🜲	
	B I <u>U</u> abe ≣ <b>≡ ≡ ≡</b>		
	Text Color	Background Co	lor Border Color
			• -
	$\odot$	$\odot$	$\odot$
	$\odot$	$\odot$	
		$\bigcirc$	$\odot$
		$\bigcirc$	$\odot$
	۲	$\odot$	$\odot$
	Transparent	Transparent	
L] [			<u>D</u> K <u>C</u> ancel
### 15.2.5 IT Concept

On the *Designs* page of the *Designs and Styles* dialog, you can select a color scheme to be applied to your documentation and IT concepts. When you create an IT concept, Docusnap uses the currently selected design. If you want to use a different design for IT concepts, you can select it individually for each IT concept in the IT <u>Concept Editor</u>.

Designs and Styles				ØØ <sub>0</sub> <mark>6.1</mark>
IT Concepts	(	Designs		Template
	Use Company Designs			Docusnap AG
	Black Red	Red-Orange	Orange	docusnap.intern
	Yellow-Oran Yellow	Yellow-Green	Green	Microsoft Windows Server 2008
	Blue-Green Blue	Blue-Violet	Violet	Name SMEX0003
		Dide violet	VIOLET	SMII0001 SMII0002 SMRA0001
	Red-Violet Grey	Sky Blue		
				<u>D</u> K <u>C</u> ancel

### **15.3 Company Settings**

To define the settings for the designs for reports, the IT concept, and the documents, created in the documentation process, open the <u>Designs and Styles</u> dialog. In contrast, the *Company Settings* allow you to customize the design to match the CI of your company. These settings will be saved in the database and will always be available when Docusnap is connected to this database.

To open this dialog, click the *Company* button on the *Management* ribbon.



All settings you define here only apply to the company selected under *Select Company*. Confirm the settings by clicking *OK*. If you switch to another company after modifying a setting, the settings for the previously selected company will be reset. For this reason, you first should save the changes for a company by clicking

lacktriangleright lacktriangleright lacktriangleright lacktriangleright lacktriangleright lacktriangleright lacktriangleright lacktriangleright lacktriangleright lacktriangleright lacktriangleright lacktriangleright lacktriangleright lacktriangleright lacktriangleright lacktriangleright lacktriangleright lacktriangleright lacktriangleright lacktriangleright lacktriangleright lacktriangleright lacktriangleright lacktriangleright lacktriangleright lacktriangleright lacktriangleright lacktriangleright lacktriangleright lacktriangleright lacktriangleright lacktriangleright lacktriangleright lacktriangleright lacktriangleright lacktriangleright lacktriangleright lacktriangleright lacktriangleright lacktriangleright lacktriangleright lacktriangleright lacktriangleright lacktriangleright lacktriangleright lacktriangleright lacktriangleright lacktriangleright lacktriangleright lacktriangleright lacktriangleright lacktriangleright lacktriangleright lacktriangleright lacktriangleright lacktriangleright lacktriangleright lacktriangleright lacktriangleright lacktriangleright lacktriangleright lacktriangleright lacktriangleright lacktriangleright lacktriangleright lacktriangleright lacktriangleright lacktriangleright lacktriangleright lacktriangleright lacktriangleright lacktriangleright lacktriangleright lacktriangleright lacktriangleright lacktriangleright lacktriangleright lacktriangleright lacktriangleright lacktriangleright lacktriangleright lacktriangleright lacktriangleright lacktriangleright lacktriangleright lacktriangleright lacktriangleright lacktriangleright lacktriangleright lacktriangleright lacktriangleright lacktriangleright lacktriangleright lacktriangleright lacktriangleright lacktriangleright lacktriangleright lacktriangleright lacktriangleright lacktriangleright lacktriangleright lacktriangleright lacktriangleright lacktriangleright lacktriangleright lacktriangleright lacktriangleright lacktriangleright lacktriangleright lacktriangleright lacktriangleright lacktriangleright lacktriangleright lacktriangle

### 15.3.1 Desgins

On the Designs page, you can select a design for the selected company. This design will be used for reports, documents, maps, and IT concepts. Only if the *Use Individual Company Design* checkbox is enabled, you can select a design to be applied specifically to this company. Otherwise, the local design will be used.

In addition, you can select a specific company logo. This logo will be saved in the database and will always be available when Docusnap is connected to this database.

The company logo will be shown on the reports, in the documents, and the maps along with the logo defined in the <u>Designs and Styles</u> dialog.

Define Company Settings		් 6.1
Select Company           Docusnap Inc		Preview
Designs	Black Red Red-Orange Orange	Docusnap AG
Reports	Yellow-Oran Yellow Yellow-Green Green	docusnap.intern
Edit Designs		Microsoft Windows Server 2008
Report Styles	Blue-Green Blue Blue-Violet Violet Red-Violet Grey	Name SMEX0003 SMII0001 SMII0002 SMRA0001
	Company Logo	Microsoft Office Excel Settings
	Use Individual Company Logo         Select         Remove	Table Style:
		<u> </u>

## 15.3.2 Report Settings

In Docusnap, you can define a cover page, as well as a header and footer, for each individual report. In the *Define Company Settings* dialog, you can now customize the settings and the <u>design</u> to be used with the selected company.

## Structure

On the Report Settings page, 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 on the <u>Designs</u> page. 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 *Designs* 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 button to select a report. Docusnap provides pre-formatted reports that include headers, footers and cover pages. The corresponding files are stored in the Reporting folder under the current system path. As the system path, Docusnap uses the path specified for the local settings or for the team settings in the Options dialog. The files containing the header, footer and cover page definitions are available in English (EN\_MasterReport.mrt) and German (DE\_MasterReport.mrt).

It is recommended to use these files. If you want to use a different header, footer or cover page for the company, you can copy the files from the Reporting folder and save them under a different name. Then, you can select the desired file from the *Define Company Settings* dialog and open it in the Report Designer by clicking the *Design* button to change it as required

## **Styles**

In the Report Designer, you can assign a style to each element (data band, text box, line, etc.). By editing these styles, you can change the appearance of all reports simultaneously. Styles can be used to modify the font, color, frames and other properties. In addition, the size and position of the elements can be specified in the Report Designer as required.



If you define a style for an element, these format settings will be always be used rather than the format settings applied in the Report Designer.

For more information about how to create customized reports, see the Administrator Manual.

Select Company	Customize Cover. Header and Footer	
Docusnap Inc 🗸 🗸		
	Status: Individual Settings	
Designs	German: DE_MasterReport.mrt Design	
Reports	English: EN_MasterReport.mrtDesign	
Edit Designs	(Options)	
D. LOL	Show Cover	
Report Styles	Show Header	

#### 15.3.3 Edit Designs

You can add to the predefined designs by creating your own designs on the company level. Click the *New* button to create a new design for which you need to specify a name in English and German. You can then define colors for the various levels of your design. Click the *Save* button to save the design.

Click the *Add Local Designs* to load the local designs which you can then customize for your company.

Define Company Settings			ుఫి 6.1
Select Company          Docusnap Inc         Designs         Reports         Edit Designs         Report Styles	Sky Blue	Editable Desi	Add Local Designs Save Delete New
	Name German: Name English: Color Level 1: Color Level 2: Color Level 3: Color Border: Color Border:	Edit Design	Preview Docusnap AG docusnap.intern Microsoft Windows Server 2008 Name SMEX0003 SMII0001 SMII0002 SMRA0001
			<u>Q</u> K <u>C</u> ancel

To use your custom design, you need to select it on the *Designs* page.

### 15.3.4 Edit Styles

On the *Report Styles* page, you can modify the formatting of each style or create new styles.

You can define text settings, border settings, and colors for your styles. The settings are saved for the style that is currently selected in the dropdown list. If desired, you can apply the selected font to all styles. For the border, you can set the type and the border style to be applied.

The color can be set to the various shades available for the selected design. A shade set as the color for the text, the background, or the border will still be used when you select another design. The color defined through the drop-down list will also still be used when you select another design.

To save modifications to existing styles, click the *Apply* button. Clicking the *Load Default* button deletes all custom styles and restores the original design settings.

Clicking the Load Local Styles button loads the custom styles you defined locally.

Click the *New* button to create a new style. After assigning a name for the design in English and in German, you can save the style and then define its formatting.

Define Company Settings		_	o\$ 6.1
Select Company	Component Style		General
Docusnap Inc -	Cover_Title	-	
Designs	German Name: Titelblatt_Titel		Preview
Reports	English Name: Cover_Title		
	Save New	Delete	Apply Load Local Styles Load Default
	Text Settings		Border Settings
Report Styles	Apply Font to all Styles		Solid 💌 1 🛫
	Calibri 🔹	24	
	B I <u>U</u> abe ≣ ≣ ≣	= =	
		( <b>D</b> )	
	l ext Color	Background	Color Border Color
	$\odot$	$\odot$	$\odot$
	$\bigcirc$	$\odot$	$\odot$
	$\odot$	$\odot$	$\odot$
	$\odot$	$\odot$	$\odot$
	۲	$\odot$	$\odot$
	Transparent	Transparent	nt
			<u>D</u> K <u>C</u> ancel

## 15.4 Management

Using the buttons on the *Management* ribbon, you can edit the predefined Docusnap types or create new ones.

Jobs	Configuration Notification Define Notifications	Schema importieren	Plan Package	Designs Company	Active Directory	Inventory     ✓     Extensions     ✓     License Management     ✓
De	ocusnap Server	IT Assets	Docusnap Connect		Settings	

# **Inventory Group**

From the Inventory group, you can manage the following: SNMP types, SNMP Mibs, server roles, inventory types, inventory status, Software Search, Active Directory and NTFS filters.

## License Management

In the License Management group, you find the buttons for managing software categories, license types and maintenance types.

## Extensions

From the Extensions group, it is possible to open dialogs where you can define new extension types and edit or delete existing ones.

### User

Within Docusnap, you can assign users to various roles. These roles control a user's permissions in Docusnap. This allows the administrator to define a granular control of a user's permissions.

### 15.4.1 Inventory

The Inventory group contains buttons you can use to open management dialogs for items related to the inventory process.



## **SNMP** Types

SNMP types can be used to specify the SNMP devices found by Docusnap more precisely.

## **SNMP** Mibs

Using the Manage MIBs dialog, you can import single MIBs and import or export all MIBs for external use.

# **Server Roles**

Usually, each server has a specific role (e.g. mail server). In order to easily identify the role of each server, you can assign a role to the server service started for it.

## Software Search

The Software Search feature enables you to search for Windows software that has not been registered using the Windows Installer. In this case, the search is performed using either the program's file name or its properties.

# **Active Directory**

In the Manage Active Directory dialog, it is possible to customize the scope of the AD inventory process and the Active Directory data output. The settings for classes, properties and assignments from this dialog will be taken into account when Docusnap scans the Active Directory system.

### 15.4.1.1 SNMP Types

When performing an <u>SNMP inventory scan</u>, Docusnap looks for the available SNMP devices. However, no information is returned on the type of the identified device, for example, whether it is a switch, a router or a printer. In the *Manage SNMP Types* dialog, you can define keywords that will be compared with the identified SNMP equipment. Then, Docusnap is able to indicate the correct type in the Data Explorer. The value that will be used for comparison with the keyword is specified in the *Description* column of scanned equipment.

The Manage SNMP Types dialog lists predefined keywords that are often used for SNMP devices. Click the *New* button to add an additional SNMP type. Enclose the keyword in percentage symbols (%). These symbols are placeholders; they replace the remaining words in the description. The keyword you enter must exist in the description of the SNMP device. Otherwise, the correct type will not be found.

	Keyword	Туре
2	%Backup%	Backup
•	%Beamer%	Beamer
P	%Bridge%	Bridge
P	%Camera%	Webcam
P	%ELvmnix%	Server
P	%Fax%	Fax
2	%Firewall%	Firewall
2	%HUB%	Hub
•	%JetDirect%	Printer
2	%LaserJet%	Printer
2	%Managementboard%	Managementboard
2	%Mobile Device%	Mobile Device
2	%Phone%	Phone .
Keyw	vord: %Backup%	
Гуре	Backup 💌	

### 15.4.1.2 SNMP Mibs

In Docusnap 6.1, you can include your own or third-party MIBs in the <u>SNMP</u> Inventory.

By adding, importing and enabling different MIBs, you can restrict SNMP systems scans to certain device types for which manufacturer information should be considered during the scan.

The Manage MIBs dialog allows you to manage the MIBs. There, you can add MIBs to the list by clicking the *Import* button. In addition, you can export the entire schema and import it into a new database. Thus, it is possible to reuse the schema elsewhere.

First select an MIB, then use the checkboxes next to the entries to determine the manufacturer information to be retrieved for the individual systems.

Manage MIBs		¢∯ 6.1
Manage MIBs     Search MIBs	□       SNMPv2-SMI         □       @ FC1213-MIB         □       Ø BRIDGE-MIB         □       Ø Q-BRIDGE-MIB	All         Backup         Beamer         Bridge         Fax         Firewall         Hub         Managementboard         Mobile Device         Network COM         Network USB         Phone         Printer         Router         SAN Hub         SAN Switch         Scanner         Server         Storage         Switch         Thinclient         USV         Webcam         WLAN         Workstation
		Save Close Cancel

Manage MIBs	APv2-SMI iso.org dod internet internet imib-2 imib-2 imib-2 imib-2 imib-2 imib-2 imib-2 imib-2 imit ransmission imit rans
	di
Label	Value
Name	BRIDGE-MIB
Oid	1.3.6.1.2.1.17
Oid Path	iso.org.dod.internet.mgmt.mib-2.dot1dBridge
Туре	Object/dentifier
Syntax	
Children	Count 7
Enabled	Yes
	<u>Save</u>

#### 15.4.1.3 Server Roles

Servers may have various roles. These roles can be defined in the *Manage Roles* dialog. When you perform an inventory scan of the servers, all services are retrieved that that are present on the server at the time of the scan. By having a look at the services that have been started, you can see which tasks they fulfill.

In the Manage Roles dialog, you can enter the role name and the service that defines it. Enter any meaningful name for the role and English and German designations. The name of the service must match the designation of the service identified by Docusnap. If the user interface language is English, the role name will be displayed in English. When you switch to German, the German name will be shown.

Role Name		Service Name	_
🏠 Apache We	bserver	Apache	
🏥 Centura SQ	L Server	Centura SQLBase	
🏥 Enteo Mana	gement Point Executive Server	Management Point Executive	
Enteo Netin	istall Server	NetInstall Replication Service	
👔 Firebird Ser	ver	Firebird Server - DefaultInstance	
🏥 GFI MailEss	sentials	GFI MailEssentials Attendant	
🎒 HP Insight I	Manager 7	Insight Manager 7	
IXI-UMS Se	rver	IXI-UMS Kernel	
🏥 Jana Proxy	Server	Jana Server 2	
🏥 McAfee ePo	licy Orchestrator 2.5.1 Server	McAfee ePolicy Orchestrator 2.5.1 Server	
illin McAfee.ePo ◀	licy Orchestrator 3.0 Server	McAfee ePolicy Orchestrator 3.0 Server	•
Role Name:	Apache Webserver		
ervice Name:	Apache		
German Text:	Apache Webserver		
English Text:	Apache Webserver		
		New Delete Save	е

#### 15.4.1.4 Active Directory

In the Manage Active Directory dialog, it is possible to customize the scope of the <u>ADS inventory process</u> and the Active Directory data output. The classes, properties and assignments from this dialog will be available when inventorying the Active Directory systems.

## **ADS Classes**

Docusnap provides a number of predefined ADS classes. If required, you can add more classes. To add new items, click the *New* button. Then, enter the required information and confirm by clicking the *Save* button. To delete an item, select it and click the *Delete* button.



You can only delete classes that have not been used yet in an inventory scan. You can only change or delete user-defined classes.

You need to fill in all text fields when creating a new item. Specify any class name you like. When setting the filter, make sure that it exactly matches the designation used in the Active Directory. If the name and the designation are not identical, it will not be possible to scan the desired information.

Classes for which the *Active* checkbox has been ticked will be taken into account when scanning the Active Directory.

Manage Active Director	у					ф¢	6.1
ADS Classes	Cla	ass Name		Class Filter		Active	
ADS Properties	🏥 Buil	iltInContainer		builtincontai	ner	Yes	
	👔 Buil	iltInDomain		builtindomai	n	Yes	
W ADD Assignments	Con	mputer		computer		Yes	_
	Con	ntact		contact		Yes	
	Con	ntainer		container		Yes	
	Fore	reignSecurityP	Principal	foreignSecur	ityPrincipal	Yes	
	Gro	oup		group		Yes	
	Gro	GroupPolicyContainer		groupPolicyContainer		Yes	
	Nam	ne:	BuiltInContainer				
	Filte	er:	builtincontainer				
	Gerr	man Text:	Standardordner				
	Engl	lish Text:	BuiltInContainer				
	Clas	ss Type ID:	4	Active			
					<u>N</u> ew <u>D</u> ele	ete <u>S</u> av	е
							ose

## **ADS Properties**

On the ADS Properties page of the dialog, you can define attributes. Here again, you can only change or delete user-defined entries.

The name of the property must exactly match the designation of that property or attribute in the Active Directory. The selected type must be the same as the property type.

The *Single Value* checkbox indicates whether this property may exist more than once in each class (e.g. e-mail addresses) or whether it exists only once (e.g. a

name).

Manage Active Directory			ot 6.1
ADS Classes	Property Name	Property Type	Single Value
ADS Properties	accountexpires	Period	Yes
	accountNameHistory	Text	No
W ADS Assignments	activationSchedule	Text	Yes
	activationStyle	Number	Yes
	adminDescription	Text	Yes
	adminDisplayName	Text	Yes
	allowedAttributes	Text	Yes
	badPasswordTime	Period	Yes
	2 c	Text	Yes
	canonicalName	Text	Yes 🔻
	Name: accountexpire	25	Single Value
	Type: Period	•	
	German Name: Konto läuft ab	)	
	English Name: Account Expin	res	
		New	<u>D</u> elete <u>S</u> ave
			Close

## ADS Assignments

In the Active Directory, properties or attributes are assigned to the respective classes. An attribute may be assigned to several classes.

The assignment is made for the class selected in the list box. All available properties are displayed in the list on the left. The pane on the right contains the properties that have already been assigned.

ADS Classes	BuiltInContainer		•		
ADS Properties	accountexpires		<u>A</u> dd >>	adminDescription	
ADS Assignments	accountNameHistory			🚾 adminDisplayName	
	activationSchedule	=	<< <u>R</u> emove	allowedAttributes	
	activationStyle			canonicalName	
	badPasswordTime			<pre>createTimeStamp</pre>	
	C c			<pre>creationTime</pre>	
	CO			description	
	Comment			directReports	
	Company			🗹 displayName	
	ContainerInfo			distinguishedName	
	CountryCode			dsCorePropagationData	
	deletedItemflags			FromEntry	
	delivContLength			instanceType	
	department			isCriticalSystemObject	
	desktopProfile			IockoutDuration	
	dNSHostName			Contraction Vindow	
	FacsimileTelephoneNumber			🗹 maxPwdAge	
	garbageCollPeriod	_		🗹 name	

## 15.4.1.5 Software Search

The Software Search feature enables you to search for Windows software that has not been registered using the Windows Installer. Software Search is one of the steps executed as part of the inventory process for <u>Windows Systems</u>.

This option is disabled by default and must be enabled from the Options dialog.

Inventory	-	-	-	<i>i</i> a a a a a a a a a a a a a a a a a a a
Company Selection	Apply Software Search			
<ul> <li>Windows Systems</li> <li>Software Search</li> </ul>	Name Dutty	Version		
Summary		0,02		

## Manage Software Search Dialog

This dialog can be used to add software entries for the Software Search. Click the *New* button to add a new entry. Enter the required information and confirm by clicking *Save*. Now, the entry will be listed in the table. The *Software Name* and *File Name* fields are mandatory. You can enter any information in the Software Name, Publisher and Version fields. Their content is only used for display in Docusnap and does not affect the search. The *File Name* field, however, must exactly match the name of the file you are looking for. The *File Size* and *Date modified* fields can be used to limit the search results. If you know that multiple files with the same file name exist in a system, it would be a good idea to use these fields because

Docusnap terminates the search for a certain system as soon as one file matching the search criteria has been found. Specify the file size in bytes. The search path is optional, but if specified, it may significantly reduce the search time in some cases. To remove one or more entries from the list, select them and click the *Delete* button.

	Publisher	Version	File Name	FileSize	Date Mo
PuTTY		0.62	putty.exe	0,37 N	1B
4					•
Software Name:	PuTTY				
Publisher:					
Publisher: /ersion:	0.62				
Publisher: /ersion:	0.62				
Publisher: /ersion: File Name:	0.62 putty.exe				
Publisher: /ersion: file Name: file Size:	0.62 putty.exe 384642				Byte
Publisher: /ersion: File Name: File Size: Date modified:	0.62 putty.exe 384642	<b>•</b>			Byte
Publisher: /ersion: File Name: File Size: Date modified: Gearch Path:	0.62 putty.exe 384642  C:\	<b>•</b>			Byte

#### 15.4.2 License Management

For the License Management module, it is possible to edit existing types or create new ones.

Using <u>Software Categories</u> you can define for software products whether the licenses will be assigned to devices, processors, processor cores, users or not at all.

In the Manage License Types dialog, you can define the type of a license.

In addition to the licenses, you can also enter software maintenance agreements

that were bought together with the licenses. In the <u>Manage Maintenance Types</u> dialog, you can add new types and edit or delete existing ones.

These management dialogs can be opened by clicking the corresponding buttons in the License Management group on the *Management* ribbon.



### 15.4.2.1 Software Categories

When you create a software product from the License Management module, you can assign it to a category. Docusnap provides predefined categories. In the Manage Software Categories dialog, you can edit the existing categories or create new ones.

The categories can be named both in English and German. The name itself may be chosen freely.

The assignment of a category determines the basic settings, such as the type of licensing, for the product. The category you select here determines whether it will be possible to use keywords and create <u>system assignments</u> or <u>user assignments</u> in later wizard steps. The selected *assignment* determines whether the licenses in this category will be assigned to devices, processors, processor cores, users, or not at all.

If you prefer not to use a keyword-based assignment, tick the No Automatic Assignment checkbox.

The word *Manual* in the names of the predefined categories indicates that no keyword-based search will be used. Rather, the licenses in use need to be entered manually.

Nar	me		As	signment Mode	No Automatic Assignment
Star	ndardLic	ense	No	Assignment	No
Dev	viceLicer	ise	Ho	sts	No
Use	erLicense	9	Us	ers	No
CPI	ULicense	)	Pro	ocessors	No
CPU	JCoreLic	ense	Pro	ocessor Cores	No
Star	ndardLic	enseManual	No	Assignment	Yes
Dev	viceLicer	nseManual	Ho	sts	Yes
Use	erLicense	eManual	Us	ers	Yes
CPL	ULicense	Manual	Pro	ocessors	Yes
CPU	JCoreLic	enseManual	Pro	ocessor Cores	Yes
me:		StandardLicense		Assignment:	No Assignment
rman T	Fext:	Standardlizenz		] Search:	No Automatic Assignment
glish T	ext:	Standard license		]	New Delete Save

### 15.4.2.2 License Types

Purchased licenses can be of various types, depending on how they were bought, e.g. volume licenses, package licenses or OEM products. When running the License Management wizard, you can select the appropriate purchase type. The license types are only shown for your information. They do not affect the behavior of Docusnap when determining the corresponding license balance.

Docusnap provides predefined license types. You can add more types, if required. Click the *New* button to create an additional license type. You can enter any desired name and designations in English and German. To add the new entry to the list, click the *Save* button.

Manage	License Types 00 6.1
Name	
Volume	eLicense
Packag	geLicense
OEM	
System	nbuilder
🔋 Packag	geLicenseUpgrade
Name:	VolumeLicense
German Text	t: Volumenlizenz
English Text	Volume license <u>N</u> ew <u>D</u> elete <u>S</u> ave

#### 15.4.2.3 Maintenance Types

Not only the licenses, but also the associated maintenance contracts can be managed from the License Management dialog. When creating a new license in the <u>wizard</u>, you can also add software maintenance agreements. The Manage Maintenance Types dialog lists the predefined types. You can add new types, if required. To create new software maintenance types, click the *New* button. You can

enter any desired name and designations in English and German. Enter the desired information and add the new entry to the list by clicking the *Save* button.

	anage iviai	itenance rype	5			010	0.1
	Name						
1	Software As	urance					
î¦	Software Up	late					
ľ	No Assurance	e					
ľ	UnknownTyp	e					
Nam	e:	Software Assuran	се				
Nam	e: nan Text:	Software Assuran	се				
Nam Gern Engli	e: nan Text: ish Text:	Software Assuran Softwarewartung Software Assuran	ce				
Nam Gern Engli	e: nan Text: ish Text:	Software Assuran Softwarewartung Software Assuran	ce ce	New	Delete		ve

### 15.4.3 Extension Types

Extensions allow you to store comments, financial data, passwords, contracts and reminders for selected objects in the tree view. To learn more about how to work with extensions, see the Extensions section.

Docusnap provides different types of extensions that can be used to define the content of the extension more precisely. In Docusnap, predefined types are available that can be extended as required.

The management dialogs for the different types can be opened from the Management ribbon.

# Settings

57	<b>O</b>	Active Directory	1	Inventory	•
Designs	Company	🐞 Software Search		Extensions	•
Designs	Company	🚔 SNMP 🛛 👻		Comment Types	
		Settings		Finance Types	
			80	Password Types	
			Ð	Reminder Types	ľ
			•	Contract Types	

#### 15.4.3.1 Financial Types

Click the *New* button to add a new type. You can choose any name you like, but it is recommended to enter a meaningful name. If the user interface language is English, the names of the finance types will by default be displayed in English in the Cost Type list box of the data entry screen. These names are also available in German. To edit a finance type in the Manage Finance Types dialog, highlight it. Then, you can edit the English or German designation in the text fields.

Manage Finar	ance Types	o© 6.1
Name		
Direct Costs		
Fixed Costs		
Name:	Direct Costs	
German Text:		
English Text:	Direct Costs	
	<u>N</u> ew <u>D</u> elete	<u>S</u> ave
		<u>C</u> lose

### 15.4.3.2 Contract Types

Click the New button to add a new type. You can choose any name you like, but it is

recommended to enter a meaningful name. If the user interface language is English, the names of the contract types will be displayed in English in the Contract Type list box of the data entry screen. These names are also available in German. To edit a contract type in the Manage Contract Types dialog, highlight it. Then, you can edit the English or German designation in the text fields.

Name			
Service Le	evel Agreement		
📮 Operation	al Level Agreement		
📮 Underpinn	ing Contract		
🟹 Sales Cor	tract		
🟹 Service C	ontract		
📮 Leasing C	ontract		
Employme	nt Contract		
	nt Contract		
ame:	nt Contract Service Level Agreement		
ame:	Int Contract Service Level Agreement Service Level Agreement (SLA)		
ame: ierman Text:	Service Level Agreement Service Level Agreement (SLA) Service Level Agreement (SLA)		

### 15.4.3.3 Password Types

Click the *New* button to add a new type. You can choose any name you like, but it is recommended to enter a meaningful name. If the user interface language is English, the names of the password types will by default be displayed in English in the Password Type list box of the data entry screen. These names are also available in German. To edit a password type in the Manage Password Types dialog, highlight it. Then, you can the English or German designation in the text fields. Click the *Save* button to apply your changes.

	Name					
91	User Passv	rord				
<b>?</b>	System Pas	sword				
<b>?</b>	BIOS Pass	vord				
81	WEP					
81	WPA					
		Ilser Password				
am	ie:	User Password			 	
am	ne: man Text:	User Password Benutzerpasswort			 	
am	ne: man Text: ish Text:	User Password Benutzerpasswort User Password			 	

## 15.4.3.4 Reminder Types

Click the *New* button to add a new type. You can choose any name you like, but it is recommended to enter a meaningful name. If the user interface language is English, the names of the reminder types will by default be displayed in English in the Reminder Type list box of the data entry screen. These names are also available in German. To edit a reminder type in the Manage Reminder Types dialog, highlight it. Then, you can edit the English or German designation in the text fields.

Name		
E-Mail		
Remind	er	
🕀 Fax		
Meeting		
🕀 Privat		
🕘 Miscella	aneous	
🕖 Phone 🤇	all	
🕖 Revisio	n	
Service		
ame:	Inquiry	
т.,	A f	
erman Text:	Antrage	
nglish Text:	Inquiry	

### 15.4.3.5 Comment Types

Click the *New* button to add a new type. You can choose any name you like, but it is recommended to enter a meaningful name. If the user interface language is English, the names of the comment types will by default be displayed in English in the Comment Type list box of the data entry screen. These names are also available in German. To edit a comment type in the Manage Comment Types dialog, highlight it. Then, you can edit the English or German designation in the text fields.

	Name					
	User Manua	al				
V	Datasheet					
V	Additional I	nformation				
V	Warranty In	formation				
V	Manufacture	er Information				
V	Contact Info	ormation				
V	Invoice					
V	Draft					
V	Miscellane	Dus				
V	Technical D	ocumentation				
V	Technical S	pecification				
lame	e:	User Manual				
àerm	an Text:	Benutzerhandbuch				
inglis	sh Text:	User Manual				
			[	<u>N</u> ew	<u>D</u> elete	<u>S</u> ave

### 15.4.4 User Management

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. If no users have been defined, any user who connects to this database may use all of the controls and the entire Docusnap functionality.

## Roles

In the *Mange Roles* dialog, you can create and edit roles that can later be assigned to a user in the *Manage Users* dialog. Roles define which user interface controls will be enabled or disabled. Docusnap provides predefined roles. You may, however, create your own roles.

## Users

In the *Manage Users* dialog, you can create users and assign roles to them. Once you have created and saved the first user, User Management will be enabled. When you create users, make sure that at least one of them has a role that allows this user to open the User Management dialog. Otherwise, it will no longer be possible to access this feature.

# Categories

Categories control which extensions are visible to which users. First, create the desired categories in the *Manage Categories* dialog. Then, these categories are available for assignment to the extensions.

## 15.4.4.1 Roles

In the *Manage Roles* dialog, you can create and edit roles that can later be assigned to a user in the <u>Manage Users</u> dialog. Roles define which user interface controls will be enabled or disabled.

The left pane lists the existing roles and the right pane contains a list of the controls that have been enabled or disabled for the selected role. To enable a control for a role, tick the checkbox in the *Enabled* column. You can add new roles or edit or delete existing roles as desired.

Role	Description				
Administration	Includes all controls, users or groups with this role have access to entire Docusnap functionality.				
Customizing	Includes only the controls needed for customization tasks.				
IT Documentation	Includes only the controls required to create documentation.				
Inventory	Includes the controls required to perform inventory scans.				
License Management	Includes the controls required for license management.				

Predefined Roles:

Organization	Includes the controls required for administrative tasks.
Permission Analysis	Includes the controls required to perform permission analyses.
Relations	Includes the controls required for the definition of relations.
User Management	Includes the controls required for user management.
View	Includes only the controls that turn Docusnap into a viewer. This means that users with this as their one and only role can do nothing but view existing data.



#### 15.4.4.2 Users

In the *Manage Users* dialog, you can assign different roles that have been previously created in the <u>Manage Roles</u> dialog, to individual domain users or domain groups.

If no users or groups have been defined, any user who connects to this database may use all of the controls and the entire Docusnap functionality. Once the first user or group has been created, the User Management feature will be enabled.

The left pane lists the users or groups to whom roles can be assigned. Make sure to specify the user names in the following format: **domain\username**. To define a

group, enter its name as follows **domain\groupname**. The right pane lists the individual roles that can be assigned to the users or groups. To assign a role to a user or a group, select the desired entry in the left pane and tick the desired checkbox in the right pane. Please note that role assignments are additive. This means that the controls enabled for the individual roles add to each other.

When creating users or groups, make sure to assign a role that has the permission to manage at least one user or one group. Otherwise, User Management will no longer be accessible.

Manage Users		o 🏶 🤞 1
Domain User: Description: Domain User Docusnaplcgr Docusnaplfbr Docusnaplfbr	Docusnap\eno         Edwin Noordenbos         Christina Grunewald         Edwin Noordenbos         Flora Brettschneider         t         Gast	Image: Second strategy         Image: Second strate
		New Delete Save

### 15.4.4.3 Categories

When defining <u>Extensions</u> it is possible to assign categories defining which user or user group may access this extension.

You can create as many categories as desired in the *Manage Categories* dialog. Some categories are predefined. In addition, you can add your own categories, such as *High priority*, *Medium priority*, and *Low priority*.

To create a new category, click the *New* button. For each category, enter a name and a designation (text) in English and German to be displayed with the extensions. For each extension type, the categories you created are displayed in the *Category* drop-down list. Whether or not a category is visible, depends on the role to which it was assigned.

The Role list displays the available roles. For each role, you can select the categories

that will be visible when a user with that role wants to work with extensions. If the current user has been assigned a role for which the category is visible, the respective extensions are displayed, otherwise, they are hidden.

If you select the *<No selection>* category for an extension, it remains visible to all users.

Manage Categories		<mark>ه ف</mark> ر
Name: Organization		
German Text: Organisation	English Text: Organization	
	New	<u>D</u> elete <u>S</u> ave
Role	Category	Visible
Administration	<ul> <li>Organization</li> </ul>	
🧀 Inventory	Administration	
🔊 Organization	Technology - Trainees	
🔊 License Management	V Technology - General	
🧬 View	Technology - Infrastructure	
🔊 Customizing	Technology - Technical Sales	
🧬 User Management	Technology - External Employees	
nalysis Permission Analysis	<ul> <li>Management</li> </ul>	×
B IT Documentation		
		Save

#### 15.4.5 Permissions

In User Management, you can specify whether a user has the permission to use certain functions.

By assigning permissions, it is possible to specify which data a user may read, edit or delete. These permissions are determined at the record level. You can define permissions for data in the tree view and permissions for extensions.

The *Permission* feature can only be used after users and groups have been defined in the Manage Users dialog.

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 or click the *Permission* button on the *Management* ribbon.

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 from the *Manage Objects* dialog, 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				• <b>0</b>	6.1
Roles and Target Objects	Read	Write	Delete	Insert	
🖃 🗐 🧬 Administration					
- 💷 Object: Docusnap Inc					
💷 Type: Company					
🖃 🖉 🧬 Customizing					
💷 Object: Docusnap Inc	1	L			
🛄 Type: Company	1	1			
🖃 🗐 🧬 Inventory					
- 💭 Object: Docusnap Inc					
Type: Company					
🖃 🖉 🍰 IT Documentation					
🛄 Object: Docusnap Inc	$\checkmark$				
🛄 Type: Company					
🖃 🗐 🧬 IT Relations					
- 💷 Object: Docusnap Inc					
🛄 Type: Company					
🖃 🗇 🖉 License Management					
- 💷 Object: Docusnap Inc					
🛄 Type: Company					
🖃 🗇 Organization					
Object: Docusnap Inc					
Type: Company					
🖃 🗇 Permission Analysis		_	_	_	
🛄 Type: Company					
🖃 🖉 💑 User Management		_	_		
🛄 Object: Docusnap Inc	1	1	1	1	
I	1	1	1	1	Ŧ
			<u>C</u> lose	Cano	el:



# **16** Data Organization and Analysis

The Data Organization and Analysis section covers Docusnap features that enable you to analyze and organize the data resulting from an inventory scan.

# 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.

## FaciPlan

FaciPlan is a facility management software. You can manage any inventoried equipment from within Docusnap. FaciPlan can access this data and integrate it into building plans.

## **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 system.

## 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.

### 16.1 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 of the same name in the *General* group of the *Advanced* ribbon.



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).

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.

The report can be exported from the <u>Reporting</u> 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.

Compare Data 6.1							
Start Point: 💺 WMWS0032 Levels: 5 💭 🔲 Compare all Levels 🖾 Show only Differences							
	Scan Date	Snapshot	Description	Domain N	Deletable	Snapshot	
	3/19/2013 10:	Inventory from		docusnap.inte	Yes	WMI	
LQ.	3/26/2013 3:2	Inventory from		docusnap.inte	Yes	WMI	
LQ.	3/27/2013 10:	Inventory from		docusnap.inte	Yes	WMI	
	Scan Date	Snapshot	Description	Domain N	Deletable	Snapshot	
EQ.	3/19/2013 10:	Inventory from		docusnap.inte	Yes	WMI	
10	3/26/2013 3:2	Inventory from		docusnap.inte	Yes	WMI	
E.	3/27/2013 10:	Inventory from		docusnap.inte	Yes	WMI	
Compare Cancel Close							

## 16.2 Snapshot Management

To open the Manage Snapshots dialog, click the *Snapshots* button on the *Advanced* ribbon.

C Snapshots

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 <u>Options</u> 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 Sna	apshots	_					ə <b>0</b> 6.
Scan Date		Snapshot Name	Description	Domain Name	Deletable	Snapshot Cont	Report
🐚 3/19/2013 ·	10:59:30	Inventory from 3/19/2013 1		docusnap.internal	Yes	WMI	Report
3/19/2013	11:05:38	Inventory from 3/19/2013 1		docusnap.internal	Yes	AD	Report
3/26/2013	11:59:53	Inventory from 3/26/2013 1		docusnap.intern	Yes	XEN	Report
3/26/2013 3	:25:34 PM	Inventory from 3/26/2013 3		docusnap.intern	Yes	WMI	Report
3/27/2013	10:09:39	Inventory from 3/27/2013 1		docusnap.intern	Yes	WMI	Report
3/27/2013	10:19:49	Inventory from 3/27/2013 1		docusnap.intern	Yes	SQL	Report
3/27/2013 1	10:22:34	Inventory from 3/27/2013 1		docusnap.intern	Yes	EXCH	Report
3/27/2013	10:38:37	Inventory from 3/27/2013 1		docusnap.intern	Yes	SNMP	Report
•							
Vame: Inventory from 3/19/2013 10:59:30 PM							
Inventory is Deletable							
escription:							
						<u>D</u> elete	<u>S</u> ave
							<u>C</u> lose

### 16.3 System Groups

The purpose of system groups is to document individual portions of a network. When creating the <u>documentation</u>, you can define the groups to be included.

To open the Manage System Groups dialog where you can create and manage

system groups, click the System Groups button on the Management ribbon.

System Groups

To create a new group, click the *New* button. The group name can be chosen freely.

Then, select the company and the domain where the systems are currently located. Create the new group by clicking the *Save* button. If a group is no longer needed, you can remove it by clicking the *Delete* button.

All existing groups are listed in the left pane and may be selected for editing.

Group Name:       Software Development         Company:       Documap inc         Name       T         Image: Software Development       New         Delete       Save         Image: Software Development       New         Delete       Save         Image: Software Development       Image: Software Development         Image: Software Development       Image: Software Development         Image: Software Development       Image: Software Development         Image: Software Deve	Manage System Groups				ාරී 6.1
Name       Type       Filter         172 31.15.253       If       Enable Filter         Image: CL4/30DG       If       Image: CL4/30DG       If         Image: CL4/30EG       If       Image: CL4/30EG       Image: CL4/30EG         Image: CL4/30EG       Image: CL4/30EG       Image: CL4/30EG       Image: CL4/30EG       Image: CL4/30EG         Image: CL4/30EG       Image: CL4/30EG       Imag	Group Name Software Development	Group Name: Software De Company: Docusnap In	evelopment nc	▼ Domain: doc	usnap.intern + <u>N</u> ew <u>D</u> elete <u>S</u> ave
		Name           172.31.15.253           CLJ4730DG           CLJ4730EG           NetgearGS108T           PMAFBPL01           Print Server dlink-082.           Print Server dlink-688.           ROUTER           SMDC0001           SMDC0002           SMDC0003           SMEX003           SMEX002           SMEX002           SMEX002           SMEX002           SMEX001           SMPS0001           SMPS0001	Filter Filter Filter Apply Filter Remove Filter Other Excel Export S S S S S S S S S S S S S	≥>         Name           ≤         ₩ WMWS0032           ₩ WMWS0064           ₩ WMWS0113	Type       Filter         Workst       Image: Second
			)0L		<u>S</u> ave

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 main pane. 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

 $\ge$  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  $\le$  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.
#### 16.4 FaciPlan

FaciWare is a facility management software. You can manage any inventoried equipment from within Docusnap. FaciWare can access this data and integrate it into building plans. For more information on the integration of FaciWare into Docusnap, refer to the FaciWare documentation.

#### Managing Equipment in Docusnap

In Docusnap, you can create the buildings, floors and rooms. Then, you can assign the inventoried equipment to the previously created rooms.

To create buildings, floors and rooms, navigate to the *Organization* module. There, you can open corresponding data entry screens from the Explorer. When the *Facility Management* node is selected, you can create a building by clicking the *Building* option under the *New* button above the tree. Once you have added the building, you can create a floor. In the last step, you create the rooms to which you will later assign the equipment. For each building, floor or room, you can enter a name and a description.



Once you have created all required buildings, floors and rooms, you can assign the equipment to the rooms. To do so, open the Manage Building Assignment dialog by clicking the *FaciPlan* button on the *Tools* ribbon. In the drop-down list, select the company for which you created the building(s). The dialog displays all domains and equipment, as well as all buildings, floors and rooms created for the current company. To assign a device, highlight it in the tree and select the desired room in the Building Structure tree. Then, click the *Add* button.



## 16.5 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 *Tools* ribbon.

ADS Synchronization

## **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.

Active Directory Sy	nchronization	ə\$ 6.1
Company Selection	Company Selection	
Windows Systems	Select Company	
Summary	Docusnap Inc	•

#### Authentication

In the second step, you need to select the domain to be synchronized. Click 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.

Active Directory Syn	chronization	<u>ېڭ 6.1</u>
Company Selection	Please enter your login information:	
<ul> <li>Windows Systems</li> <li>Summary</li> </ul>	Domain:     docusnap.internal       User Name:     docuen\administrator       Password:     *****       Image: Image	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 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 <u>Filters</u> section.

Under *Select*, you can either select or deselect all devices.

Active Directory S	ynchroniza	ntion				<u>ېڭ (6.1</u>
Company Selection	Replicat	e Windows System	S			
Windows Systems				(Replicate ADS)	Start	Search Cancel
		Name	Туре	Password Age (Days)		Filter
		SMRA0001	Server			📰 Enable Filter
						E Apply Filter
						Remove Filter



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.

Active Directory S	ynchronization	<u>ېڭ 6.1</u>
Company Selection	Summary	
Windows Systems	Selected Modules	
Summary     Status	Windows     Detailed Information	
Report	<ul> <li>Windows Systems</li> <li>SMRA0001</li> </ul>	

## Scheduling

Through Scheduling, you can specify that the ADS Synchronization routine will start automatically at a later point in time. For this to work, you must have enabled the Scheduling feature in the <u>Options</u> dialog. In the Scheduler, 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.

## 16.6 Database Import

Docusnap allows you to to export data for import into another database.

To open the Database Export dialog, click the Export button on the Advanced 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 Access database. These two database systems are fully compatible with each other. This means that data exported from an SQL database can be imported into an Access database, and vice versa.

Database	Please select a database ty	ype:	tabase O Access D	atabase	
Settings Snanshote		Microso	off SOL Server Database		
T Concept	COL C	101		COL Course Authorities Very	
Summary	SQL Server: suevsq		Authentication:	SQL Server-Authentication	
Summary.	Database: Docusi	nap	User Name:	sa	
			Password:	*****	
				Connec	st
			Status		
	Activity	Progress	Sta	tus	
	Updating datab	base	Dat	abase updated successfully	
	Checking Basic	c Data	Bas	ic data updated successfully	
	Checking Type	e Data	Тур	e data updated successfully	
	Checking Settin	ngs	Set	tings updated successfully	
	Checking SNM	IP Schema	SN	MP Schema updated successfully	
	Checking ADS Checking Mate	Schema	AD:	S Schema updated successfully	
	Checking Meta	ischema	Inter	ascrienta upuateu successiuny	_

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.



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.

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 in Target 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.

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 <u>extensions</u> associated with source database objects, enable the *Export Extensions* checkbox in the Export Options 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 IT relations created in your database as well, enable the *Export IT Relations* checkbox.

What is more, you can export any passwords that have been created. For this purpose, an encryption file is required. Click the  $\Box$  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.

Database Import					<del>وڳ</del> 6.1
Database Settings	Define Import Settings				
Image: Source       Image: Summary	Source Database: Co	mpany / Domain Sel lern I	ection] O Integ	(Target Da rate Company from Source rate in existing Company Docusnap Inc	tabase
	Import Extensions (Finan Overwrite existing Data Import IT Relations Import Encryption File:	nce Data, Comments,	(Import Options) Passwords, Contracts, Remino	lers)	
	Ø Windows Ø Ø SNMP Ø Ø CIFS Ø	Linux Mac Active Directory	Modules DNS Server DHCP Server VMware Infrastructure	☑ SQL Server ☑ Exchange ☑ NTFS	✓ Hyper-V ✓ Xen ✓ IIS ✓ SharePoint
				<u>B</u> ack	<u>N</u> ext Cancel

Here, a list of snapshots from the selected source database is displayed. To find snapshots more quickly, you can either <u>name</u> them when doing the inventory scan, or you can assign a name to them in the <u>Manage Snapshots</u> dialog. To the right of the snapshot list, a <u>filter</u> 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 exported!

Cattions	Snapsh	ot Selection					
Snapshots		Scan Date	Snapshot Name	Description	Domain N	Deletable	Filter
IT Concept		3/19/2013 10:	Manual Systems			Yes	Enable Filter
Summany		3/19/2013 10	Inventory from 3/19/2013 10:59:30 PM		docusnan inte	Yes	
Summary		3/19/2013 11:	Inventory from 3/19/2013 11:05:38 AM		docusnap.inte	Yes	E Apply Filter
		3/26/2013 11:	Inventory from 3/26/2013 11:59:53 PM		docusnap.inte	Yes	Remove Filter
	v 10	3/26/2013 3:2	Inventory from 3/26/2013 3:25:34 PM		docusnap.inte	Yes	Select
		3/27/2013 10:	Inventory from 3/27/2013 10:09:39 AM		docusnap.inte	Yes	C Select all
		3/27/2013 10:	Inventory from 3/27/2013 10:19:49 AM		docusnap.inte	Yes	Deselect all
		3/27/2013 10:	Inventory from 3/27/2013 10:22:34 AM		docusnap.inte	Yes	Other
	<u> ∞</u>	3/2//2013 10:	Inventory from 3/2//2013 10:38:37 AM		docusnap.inte	Yes	Excel Export

In the next step, you can specify existing IT concepts to be exported. By ticking or clearing the checkboxes next to the items in the tree, you can specify the IT concepts to be exported.



Finally, a summary page provides an overview of the modules and snapshots to be exported. If you want to change any of the data export settings, click the *Back* button. To start the export, click the *Start* button.

Database Import		o\$ 6.1
Database X Settings	Summary	
<ul> <li>➢ Settings</li> <li>I Concept</li> <li>➢ Summary</li> <li>➢ Status</li> <li>☑ Report</li> </ul>	Modules selected for import   Windows   Image: CIFS   Image: Mac   Image: NMP   Image: SNMP   Active Directory   Image: DNS Server   Image: DHCP Server   Image: SQL Server   Image: SQL Server   Import Dytions   Import Dytions   Import Dytions   Import Dytions   Import Options   Import Opt	
	Back Sta	rt Cancel

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.

Database Import					oØ 6.1
<ul> <li>Database</li> <li>Settings</li> </ul>	Export Status				
in Snapshots	Name	Туре	Progress in %	Information	
💥 IT Concept	🖃 📴 Database Import	Database Imp		Executing Process	
Summary	📴 Data Import			WMWS0064 (Inserted lines: 11000)	
Status					
Report					

## **16.7** Database Export

With Docusnap, you can import data from another database. This way, it is possible to get the data from a temporary database on a notebook into a central database.

To perform a data import, click the *Import* button on the *Advanced* 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 Access database. These two database systems are fully compatible with each other. This means that data exported from an SQL database can be imported into an Access database, and vice versa.

Database Export		ېڭ <mark>ئې</mark> ې 6.1
Database	Please select a database type:	L Server Database OAccess Database
In Snapshots		(Microsoft SQL Server Database)
Summary	SQL Server: sdevsql01 Database: DocusnapDatabase	Authentication: SQL Server-Authentication     User Name: sa     Password:     Connect Create
		(Status)
	Updating database Checking Basic Data	Progress Status Database updated successfully Basic data updated successfully
	Checking Type Data Checking Settings	Type data updated successfully Settings updated successfully
	Checking SNMP Schema Checking ADS Schema	SNMP Schema updated successfully ADS Schema updated successfully Meta-schema updated successfully
	Checking Metaschema	Metaschema updated successfully
	Database opened successfully	Cancel

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.



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.

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.

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 <u>extensions</u> associated with source database objects, enable the *Import Extensions* checkbox in the Import Options 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 IT relations that exist in your database, enable the Import IT Relations 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.

Database Export	Define Export Settings				oð <mark>6.1</mark>
Settings Snapshots IT Concept Summary	Source Databas	se: Company / Domain Se nap.intern Iternal p.intern (Finance Data, Comments Data	Lection O Integr	Target Data	base
	☑ Windows ☑ SNMP ☑ CIFS	<ul> <li>Linux</li> <li>Mac</li> <li>Active Directory</li> </ul>	DNS Server DHCP Server	SQL Server Exchange Server	☑ Hyper-V ☑ Xen ☑ IIS ☑ SharePoint
				Back	<u>N</u> ext Cancel

Here, a list of snapshots from the selected source database is displayed. To find snapshots more quickly, you can either <u>name</u> them when doing the inventory scan, or you can assign a name to them in the <u>Manage Snapshots</u> dialog. To the right of the snapshot list, a <u>filter</u> 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	Snapsh	ot Selection					
Gettings Gnapshots		Scan Date	Snapshot Name	Description	Domain N	Deletable	Filter
T Concept		3/19/2013 10:	Manual Systems	boonpaar	Domain H	Yes	Enable Filter
		3/19/2013 10:	Inventory from 3/19/2013 10:59:30 PM		docusnan inte	Yes	
Summary		3/19/2013 11	Inventory from 3/19/2013 11:05:38 AM		docusnap inte	Yes	E Apply Filter
		3/26/2013 11:	Inventory from 3/26/2013 11:59:53 PM		docusnap.inte	Yes	Remove Filter
		3/26/2013 3:2	Inventory from 3/26/2013 3:25:34 PM		docusnap.inte	Yes	Select
		3/27/2013 10:	Inventory from 3/27/2013 10:09:39 AM		docusnap.inte	Yes	Select all
		3/27/2013 10:	Inventory from 3/27/2013 10:19:49 AM		docusnap.inte	Yes	Deselect all
		3/27/2013 10:	Inventory from 3/27/2013 10:22:34 AM		docusnap.inte	Yes	
		3/27/2013 10:	Inventory from 3/27/2013 10:38:37 AM		docusnap.inte	Yes	Other
							4
	4				]	•	

In the next step, you can specify the IT concepts to be imported. By ticking or clearing the checkboxes next to the items in the tree, you can specify the IT concepts to be imported.



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		ه 🔅 د
💋 Database	Summary	
🔀 Settings		
Snapshots	Modules selected for export	
X IT Concept	🐙 Windows	
	CIFS CIFS	
Summary	Mac	
Status	10 Linux	
Report	SNMP	
	Active Directory	
	La DNS Server	
	Photo Berver	
	VMware Infrastructure	
	SQL Server	
	Exchange Server	
	R NTFS Permissions	
	Export Options	
	(1) Export Extensions (Finance Data, Comments, Passwords, Contracts, Reminders)	
	Snapshots selected for export	
	Kanual Systems	
	Ki Inventory from 3/19/2013 10:59:30 PM	
	Ki Inventory from 3/19/2013 11:05:38 AM	
	Inventory from 3/26/2013 11:59:53 PM	
	Ki Inventory from 3/26/2013 3:25:34 PM	
	Ki Inventory from 3/27/2013 10:09:39 AM	
	In and a 207/2012 10.10.40 AM	

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.

Database Export					ф¢	6.1
Database X Settings	Export Status					
Snapshots	Name	Туре	Progress in %	Information		
🔀 IT Concept	🖃 🚺 Database Export	Database Exp		Executing Process		
5 Summary	🕞 Data Import			xml (Inserted lines: 17619)		
Status						
Report						

## 16.8 Move Systems

In Docusnap, you can move an inventoried system from one domain to another domain in the same or in a different company. This allows you to move in Docusnap also the inventory data associated with a system moved to another domain. 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 Data Explorer 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		o© 6.1
System to be moved: 🛛 💐 🛛 WMWS	60113	
Domain Name	Company Name	🗌 Show always 🔞
🜉 docusnap.internal	Docusnap Inc.	Filter
💭 rd.docusnap.intern	Docusnap Inc.	📰 Enable Filter
🙀 bulk.docusnap.intern	Docusnap Inc.	Apply Filter
		Remove Filter
		Select
		Deselect all
		•
4		
·		
		Move Cancel

#### 16.9 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.

## **Data Organization and Analysis**

🚯 🛛 Close						Do	cusnap 6	ō. <b>1</b>	
Inventory Documenta	ion Mar	nagement	Advar	iced Too	ls	Help			
Complete Network Vizard	🔊 Win 💇 SNN 🖹 Linu	dows 🖳 M MP 💐 IP Ix 🔊 O S	lac Segme ffline Sy Systems	nt 🎒 li stems	CIFS mport		VMware Hyper-V XenCente	) IIS SharePoint r Application Serve	Exchange
√PNew ■ Save ■ Dele	te 🔍 🛄	Þ •	Inf	ormation	Data	(4)	Editor	IT Relations	Comments (
Aver Save Determined in the second seco	itern Iternal tions (S0128) ystems ation ms Services ion Server ventory y	Action Delete . Save Compa Move Merge Remote Custon Permis: Filter	with e Deskto nize Cor sions	scan Date 3/27/2013 3/25/2013 3/21/2013 3/19/2013 op Connecti mpany Setti	0 n WE	19 AM 80 AM 80 AM 80 AM 80 AM			
🖵 🛛 Data Explo	rer								

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.

Jyst	einto be meiged. 🧠 🦏 www.sofris	
	Merge with Object	Show always 🔞
	SMDC0001	Filter
	SMDC0002	Enable Filter
ŧ,	SMDC0003	Apply Filter
	SMEX0003	Ed Berrove Filter
	SMII0001	C-l+
	SMI10002	Select
	SMPS0001	🛛 🖉 Deselect all
i,	SMRA0001	
	SMSP0001	
	SMSQ0001	í
	STDC0001	
A.	WMWS0254	
A.	WMWS0333	



## **17** Advanced Topics

## **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.

## Merge Reports

If itelio provides new or improved reports, they can be added to the report directory using the *Merge Reports* dialog.

## 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 and IT concepts.

#### 17.1 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 established.

The management tools are available from the context menu of items located in the tree at levels below the Workstations or Servers nodes.

 $\bigcirc$ 

A	tion
	Delete
	Save
	Compare
	Move
	Merge with
	Remote Desktop Connection WBWS0128
	Customize Company Settings
	Permissions
Fil	ter
	Apply Filter
	Remove Filter
	Remove all Filters

At the same time, the *Execute* button becomes available on the *Advanced* ribbon. The management tools can be started either from the context menu or using the options under the *Execute* button.

Q Search	📴 Data Import	🐡 Manag						
Compare Data	🚯 Data Export	🐴 Numbe						
🕨 Execute 🔹 🔻								
Remote Desktop Connection WBWS0128								

To open the *Manage Management Tools* dialog, click the *Management Tools* button on the *Advanced* ribbon.

		Program Path	Parameter	Active
Remotede	esktopverbindung	C:\Windows\System32\mstsc.exe	-v %Hostname%	Yes
•				
lame:	Remotedesktopverbindung			Act
rogram Path:	C:\Windows\System32\ms	sc.exe		
-	-v %Hostname%			
arameters:				
arameters:	Remotedesktopverbindung			
Parameters: German Text:	Remotedesktopverbindung Remote Desktop Connectio	n		

For each tool, you must enter a name as well as an English and a German designation. This designation will be displayed in the currently active language in the context menu or in the Execute options available from the ribbon.

To specify the program path for the tool, either enter it directly in the text field or click the  $\Box$  button to browse for it.

Enter optional call parameters for the external program in the *Parameters* field.

The following parameters are available:

%Hostname%	Computer name
%IPAddress%	IP address(es) for the system

The -v parameter is used for Remote Desktop connections and specifies the computer to connect to.

Please note that only tools for which the Active flag has been set will be displayed.

## **17.2** Merge Reports

The reports supplied with 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 <u>Options</u> dialog. If a Team Settings path has been specified, it takes precedence, otherwise, the local path will be used. When you exit the start wizard or close the Options dialog, all reports will be copied from the program directory to the selected path.

The *Merge Reports* wizard will compare the report versions from the program directory and the report repository. This wizard opens when you click the *Merge Reports* button on the *Help* ribbon.

If new or updated reports have been downloaded during an update, they will be saved to the program directory. In the *Merge Reports* wizard, you can select the reports to be copied to the report repository. If a new version of a report has been added, the older version will be moved to the *Backup* folder. If an older version of this report already exists in the *Backup* folder, it will be overwritten.

The *Manage Reports* dialog lists all reports that are stored in the report repository. If required, you can open and edit them in the Report Designer. If reports have been updated by the *Merge Reports* wizard, the reports in the reports repository will be replaced by the updated versions. This means that any user-defined changes that have been made to the reports will be lost.

The Merge Reports wizard lists all reports whose modification dates in the report repository and in the program directory differ. Using the checkboxes, you can specify the reports to be replaced by new versions. If the report in the program directory is newer, the checkbox is already ticked. When you click *OK* to start merging the reports, the selected reports found in the report repository will be replaced by the reports from the program directory. If you click the *Cancel* button, no reports will be copied.

If you abort the Merge Reports wizard by clicking *Cancel*, it will redisplay at the next start of Docusnap. If you closed the *Merge Reports* wizard by clicking *OK*, however, it will only redisplay after the next update has been downloaded.

If you enable the *Replace Existing Report Styles in Report Repository* checkbox, Docusnap will also overwrite the report properties. The properties are defined in the *Manage Reports* dialog. The properties determine the name and author of the report as well as its position in the tree structure.

Report Re			
	spository	Application Directory	-
12/10/201	2, 10:46:31	12/10/2012, 10:35:02 A	-
12/10/201	2, 10:46:31	2/4/2013, 9:55:05 AM	
12/10/201	2, 10:46:31	2/4/2013, 9:50:34 AM	
New Repo	ort	2/6/2013, 8:42:04 AM	
12/10/201	2, 10:46:31	2/4/2013, 9:49:29 AM	
12/10/201	2, 10:46:31	2/4/2013, 9:57:02 AM	
12/10/201	2, 10:46:31	12/10/2012, 10:35:02 A	
12/10/201	2, 10:46:32	12/10/2012, 10:35:02 A	- E
12/10/201	2, 10:46:32	12/10/2012, 10:35:02 A	
12/10/201	2, 10:46:32	12/10/2012, 10:35:02 A	
12/10/201	2, 10:46:32	12/10/2012, 10:35:02 A	
12/10/201	2, 10:46:32	12/10/2012, 10:35:02 A	
12/10/201	2, 10:46:32	12/10/2012, 10:35:02 A	
12/10/201	2, 10:46:32	12/10/2012, 10:35:02 A	
12/10/201	2, 10:46:32	12/10/2012, 10:35:02 A	
12/10/201	2 10:46:32	12/10/2012 10:35:02 A	-
	12/10/201 12/10/201 12/10/201 New Repo 12/10/201 12/10/201 12/10/201 12/10/201 12/10/201 12/10/201 12/10/201 12/10/201 12/10/201 12/10/201 12/10/201 12/10/201	12/10/2012, 10.46.31 12/10/2012, 10.46.31 12/10/2012, 10.46.31 New Report 12/10/2012, 10.46.31 12/10/2012, 10.46.31 12/10/2012, 10.46.32 12/10/2012, 10.46.32	12/10/2012, 10:46:31         12/10/2012, 10:46:31         12/10/2012, 10:46:31           12/10/2012, 10:46:31         2/4/2013, 9:55:05 AM           12/10/2012, 10:46:31         2/4/2013, 9:50:34 AM           New Report         2/6/2013, 8:42:04 AM           12/10/2012, 10:46:31         2/4/2013, 9:49:29 AM           12/10/2012, 10:46:31         2/4/2013, 9:57:02 AM           12/10/2012, 10:46:32         12/10/2012, 10:35:02 A           12/1

#### 17.3 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 installed.

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.

#### **17.3.1** Define Notifications

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 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.

Def	fine Notifi	cations			¢	6.1	
	Title		Statement			Active	
8	InvalidLicer	ses	SelectLicN	Select LicName, ValidTo, ServiceValidTo, AccountName fro			
1	OutdatedCo	ntracts	Select Acc	Select AccountName,CnTitle,CnDateEnd,CnDetail from tEx			
5	Reminder		Select Acc	ountName,ReTitle,F	ReDetail,ReDate from tExRe	Yes	
4				101			
•						<b>&gt;</b>	
Title:		InvalidLicenses				Active	
Statement: Select LicName,ValidTo,S tSoftwareLicenses,tSoftw tSoftwareLicenses.Softwa tSoftwareProducts.Accou {ACCOUNT} AND tSoftw.			,ServiceValidT wareProducts, vareID=tSoftw untID = tAcco wareLicenses.	o,AccountName fro tAccounts WHERE areProducts.Softwar unts.AccountID AN ValidInfinite=0 AND	m eID AND D tAccounts.AccountID = ValidTo <= {now}		
		Now: {NOW}	Domain: {[	OMAIN}	Company: {ACCOUNT}		
Germ	nan Text:	Ungültige Lizenzen		English Text:	Invalid licenses		
Desc	escription: Ungültige Lizenzen Description: Invalid licenses						
		L		<u>N</u> e	ew <u>D</u> elete	<u>S</u> ave	
						<u>C</u> lose	

#### 17.3.2 Notifications

The *Notifications* 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 automatically determine the filters that will be available in the next step.

Notification		oý 6.1
Company Selection	Company Selection	
Ccneduling	Docusnap Inc	•

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 {Account} or {Domain} variable is part of the statement, you must select a filter. A company must be selected for the {Account} variable, a domain for the {Domain} variable. Only the selected company and the associated domains 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		<u>ېڭ</u> 6.1
Company Selection	Define the Notific	ation
Scheduling		Select Template
	Template:	Invalid licenses
	SQL Query:	Select LicName, ValidTo, Service ValidTo, AccountName from tSoftwareLicenses.tSoftwareProducts.tAccounts WHERE tSoftwareLicenses.SoftwareID=tSoftwareProducts.SoftwareID AND tSoftwareProducts.AccountID = tAccounts.AccountID AND tAccounts.AccountID = {ACCOUNT} AND tSoftwareLicenses.ValidInfinite=0 AND ValidTo <= {now}
	Filter:	Docusnap Inc
		Message
	Recipient:	info@docusnap.com
	Subject:	Invalid licenses
	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.

Notification	6.1		
Company Selection	Schedule Notifications		
	Common Settings		
	Name: Invalid licenses Every Week on Friday at 18:00:00. Schedule will be used between 13.04.2013 and 04.12.2013.		
	Type: Recurring 💌		
	Interval: Weekly 💌		
	Recurring every: 1 🗮 Week(s) on: 🗌 Monday 💭 Wednesday 📝 Friday 🔲 Saturday		
	🗌 Tuesday 🔛 Thursday 🔲 Sunday		
	Frequency per day		
	One-time at: 18:00:00      Every Hour(s)      Start: 00:00:00		
	End: 23:59:59		
	Duration		
	Start Date: 4/13/2013 • • • End Date: 12/4/2013 • •		
	No End Date:		
	Job Management		
	Database Ture: SOI Servier		
	Database: Docusnad		
	Server: sdevsql01		
	Docusnap Server: WKNE0015		
	Status: started		
	Back Einish Cancel		

## 17.4 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

Docusnap Server can only generate reports that the server can access, either using the path specified under *Team Settings* or the path under *Local Settings* in the *Options* dialog.

To start the report scheduling wizard, execute 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.

Report Automation		ාරා 6.1
Company Selection	Company Selection	
Scheduling	(Select Company)	
	Docusnap Inc	*
	Occumentation Path     Alternative Documentation Path	
	C:\Documentation	
	Language	
	Language: English 🔄 🔲 Just HTML Documentation	
	A company is selected.	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 Options or the Define Company Settings 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 Automation				ල <b>ූරි 6.</b> 1
Company Selection  Report  Scheduling			(Settings)	
	E-Mail Distr	ibution	Distribution	Create DDCX Create HTML Create PDF Create XLSX
	Recipient: Subject: Message:	report@docusnap.com Report Automation - System Summ	any	Create ODT

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 Automation	<del>وي (</del> 6.1
Company Selection	Schedule Report
Scheduling	Common Settings
	Name: Workstation - System Summary Every Week on Friday at 14:00:00. Schedule will be used between 13.02.2013
	Type: Recurring
	{
	Interval: Weekly v
	Recurring every: 1 Week(s) on: Monday Wednesday V Friday Saturday
	🔲 Tuesday 🛄 Thursday 🛄 Sunday
	Frequency per day
	One-time at: 14:00:00
	End: 23:59:59 🔤
	Start Date: 2/13/2013 ▼▼ ●End Date: 12/13/2013 ▼▼
	WNO End Date:
	Job Management
	Database Type: SQLServer
	Server: sdevsql01
	Docusnap Server: WKNE0015
	Status: started
	Back Einish Cancel

## 17.5 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*.



## -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.

Konfigurationsdatei aus	wählen	-00	6.1
\\sfile01\ita\Docusnap\Configu	ration xml		
	OK	Abbr	echen

## -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.

# **Advanced Topics**

🍰 Docusnap 6 Properties 💽	
Security         Details         Previous Versions           General         Shortcut         Compatibility	
Docusnap 6	
Target type: Application	
Target location: Docusnap 6	
Target: ap.exe" -UseConfig "\\sfile01\ita\Docusnap\Conf	
Start in: "C:\Program Files\Docusnap 6\"	
Shortcut key: None	
Run: Normal window 🔻	
Comment: Docusnap 6	
Open File Location Change Icon Advanced	
	C:\Windows\system32\cmd.exe
	Microsoft Windows [Version 6.1.7601] Copyright (c) 2009 Microsoft Corporation. All rights reserved.
	C:\Users\itelio>"C:\Program Files\Docusnap 6\Docusnap.exe" -UseConfig "\\sfile0 \ita\Docusnap\Configuration.xm1"
OK Cancel Apply	



## 18 Support & Help

The Help ribbon includes all features provided by the Docusnap Support Team to assist you with problems or questions.



## General

To download an updated Docusnap version via an Internet connection, simply click the *Update* button. By clicking the *Merge Reports* button, you can synchronize your report repository. A Live Support feature is also available.

## Manual / Online Help

This group provides access the manuals and help systems both for Docusnap users and administrators.

## Support

This group provides features for generating log files and displaying general information about Docusnap.

#### 18.1 Update

The *Docusnap Update* wizard 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 you can also click the *Update* button on the *Help* ribbon to open the update dialog.

Docusnap Update 6.1.165.6	φØ	6.1
A new version of Docusnap is available. Do you want to start the down new version?	nload and instal	l the
Yes No	Cha	anges

To see a list of the new features and/or bugfixes, click the *Changes* 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.

## **18.2 Problem Resolution**

#### Enabling Debug Mode

If errors occur while using Docusnap, you can trace them. Check the *Enable Debug Mode* option in the <u>Options dialog</u> 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 in the Help ribbon, 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.

Options		oO 6.1
Options  General  Cicensing  Database  Vizards  Additional Tools  Documentation  License Management	General General Settings Database Archive Versions: 4  Password Logging  System Path / Files	6,1
Image: License Management         Image: Wight of the state of t	Local Settings: C:\telio GmbH\Docusnap 6 Team Settings: Check-out Path: C:\telio GmbH\Docusnap 6 IT Concept Path: C:\telio GmbH\Docusnap 6\ITConcept Debugging Enable Debug Mode Debug Level: Log everything Target Storage Location: Database Reset Log Disable check for installed Microsoft Office products	
		Cancel

## 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. To set the storage location, select *Database* from the Target Storage drop-down list. Clicking the *Reset Log* button will delete all existing error information from the database.
Configuration	o.	6.1
Server Start Settings       Image: Server Database       Image: Server Mail Settings       Image: Server Settings	GeneralGeneralGeneral	
	Change Server Login User: intern\administrator Password:  Remark: If no user and password is entered, Docusnap Server uses the local system account. If the system account doesn't hav permissions for the database, Docusnap Server exits with an error.  Debugging  Enable Debug Mode Debug Level: Log everything  Target Storage Location: Database  Reset Log	/e
	Next	Cancel

# Communicating Support Information to the Support Team

The Show and transmit Support Information dialog, that opens when you click Support Information from the Help ribbon, allows you to generate log files and send them to the Docusnap Support team.

nd transmit Support Infor	mation							<del>6</del> 0
Base	Debug Log	Database (	Consistency	Event Log	File Versions	Environment	System Tables	
Catego	prv		Value					
stem 🖃 D	ocusnan							
Configuration	··· Version		6 1 136 1					
	- Language		1					
~	ServerRunning		False					
	InstallPath		C:\Program F	iles (x86)\Doci	isnap 6			
-	··· DocuPath		C:\Document	ation				
g     -	- ReportReposito	лу	C:\Users\sda	AppData\Loca	\itelio GmbH\Doc	usnap 6\Reporting		
ions	··· CheckoutPath		C:\Users\sda	AppData\Loca	\itelio GmbH\Doc	usnap 6		
Toole	··· SettingsNetwor	k						
	··· SettingsLocal		C:\Users\sda	\AppData\Loca	\itelio GmbH\Doc	usnap 6		
ables	CryptoFilePath							
g -	ScanDNSRoot		False					
Consistency	RemoteRegistr	yScan	False					
	<ul> <li>ArchivVersions</li> </ul>		4					
	- ScanMode		1					
	MaxThreads		30					
	<ul> <li>I hread I meout</li> </ul>		180					
	- SNMPTimeout		180					
	··· Update I imeout		3					
	- AutoUpdate		True					
	··· UpdateProxy I )	rpe						
	UpdateProxyHe	ostname	0000					
	- Updaterroxyro	art Course	5060					
	- ReportingShow	Londor	True					
	- ReportingShow	Footer	True					
	··· leOfficeCheck[	lisabled	False					
	offware	130000	1 0130					
l l i ĭ	- OSName		Windows7					
	- OSServicePad	c	Service Pack	1				
	··· OSVersion	•	Microsoft Wir	dows NT 6.1.7	601 Service Pack	1		
	··· WordProductVe	rsion	6					
	··· WordReleaseV	ersion	9					
		pe	0					
	··· WordMajorVers	ion	20					
	WordMinorVers	ion	0					
ate Log File >>	··· WordLanguage		1031					

- 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 Outlook and creates a new e-mail. The recipient defaults to the Docusnap Support Team and the log file is attached automatically. This option only works with Microsoft Office Outlook. If you use a different e-mail client, you must first save the log file, manually create an e-mail addressed to the Docusnap Support team and attach the log file.

## 18.3 FAQ

# Windows Firewall Configuration: Basics

To make sure that Windows systems with the firewall enabled can be scanned successfully, you need to check or configure two firewall exceptions. These settings can be set up and administered using group policies. To enable you to quickly check your environment, we will also describe how to manually configure your Windows firewall. The manual configuration examples were designed for Windows 7, Vista and XP.

## **Overview: Necessary Firewall Exceptions**

The following is a brief description of the exceptions to be configured. Limiting

these exceptions to specific IP ranges can only be done by configuring group policy objects (GPOs).

# File and Printer Sharing

To enable file and printer sharing, the Windows firewall opens UDP ports 137 and 138 as well as TCP ports 139 and 445. Enabling this policy setting causes the Windows firewall to open these ports so that the Windows system can receive print jobs and access requests for shared files.

Note: This setting lets inbound ICMP echo requests (messages sent by the Ping utility) pass through the Windows firewall, even if the "Windows Firewall: Allow ICMP Exceptions" policy setting would normally block them.

Security note: Make sure to define in advance the IP addresses or subnets for which these incoming messages will be permitted.

#### Allow Remote Administration Exceptions

The Allow Remote Administration Exception option essentially corresponds to the Windows 7 & Vista Windows Management Instrumentation (WMI) exception and enables remote administration of the Windows system using management programs such as Microsoft Management Console (MMC) and Windows Management Instrumentation (WMI). For this purpose, the Windows firewall opens TCP ports 135 and 445. Services normally use these ports for communication via Remote Procedure Call (RPC) and Distributed Component Object Model (DCOM).

What is more, this policy setting makes sure that the SVCHOST.EXE and LSASS.EXE programs may receive unsolicited incoming messages and open dynamically allocated additional ports for hosted services.

Security note: Make sure to define in advance the IP addresses or subnets for which these incoming messages will be permitted.

## Windows 7

# Windows 7: Starting the Windows Firewall Configuration from the Command Line

The easiest way to start the firewall configuration is by executing the firewall.cpl command.

There are several ways to enter this command:

Start 🖉

> Click Search Programs and Files and enter firewall.cpl

> Click *Run...* and enter *firewall.cpl* 

Getting Started   Connect to a Projector	
Remote Desktop Connection	ham
Sticky Notes	Documents
	Pictures
Constraints room	Music
	Computer
	Control Panel
	Devices and Printers
	Default Programs
	Help and Support
All Programs	Run
Search programs and files	Shut down

Alternatively, you can enter the command from a console window:

Command Prompt	
C:\>firewall.cpl	

Notart 🔊

# Windows 7: Configuring Windows Firewall Interactively

Click the Start button and select Control Panel.

Connect to a Projector	
Remote Desktop Connection	
Sticky Notes	Administrator
Snipping Tool	Documents
Calculator	Pictures
Paint	Music
VDC Viewer	Computer
Windows Fax and Scan	Control Panel
Windows Pax and Scan	Devices and Printers
Getting Started	Default Programs
Magnifier	Help and Support
All Programs	Run
Search programs and files	Shut down

Click on System and Security.



Click on Windows Firewall.

# Windows 7: Setting Windows Firewall Exceptions

Click Allow a Program through the Windows Firewall.



# Support & Help

💮 Windows Firewall		
Control Panel - Syst	em and Security - Windows Firewall	👻 🔯 Search Control Panel
Control Panel Home	Help protect your computer with Windows Fire	wall
Allow a program or feature through Windows Firewall	Windows Firewall can help prevent hackers or malicious Internet or a network.	software from gaining access to your computer through the
Change notification settings	How does a firewall help protect my computer?	
🛞 Turn Windows Firewall on or off	What are network locations?	
Restore defaults	For your security, some settings are managed by	your system administrator.
Advanced settings		
Troubleshoot my network	Domain networks	Connected
	Networks at a workplace that are attached to a domain	n
	Windows Firewall state:	On
	Incoming connections:	Block all connections to programs that are not on the list of allowed programs
	Active domain networks:	dsdemo.local
	Notification state:	Notify me when Windows Firewall blocks a new program
	Home or work (private) networks	Not Connected
	Public networks	Not Connected
See also		
Action Center		
Network and Sharing Center		

lowed Programs					
○ ✓ ✓ Windows Firewall    Allowed Programs		👻 🌆 Search	Control P	anel	Z
Allow programs to communicate through Window To add, change, or remove allowed programs and ports, What are the risks of allowing a program to communicate	w <b>s Firewa</b> dick Chan <u>c</u> ?	<b>ll</b> Je settings.		Change settin	gs
For your security, some settings are managed by y	our system	administrator.			
Allowed programs and features:					_
Name	Domain	Home/Work (Priv	Public	Group Policy	-
Remote Volume Management				No	
Routing and Remote Access				No	
Secure Socket Tunneling Protocol				No	
SNMP Trap				No	
Windows Collaboration Computer Name Registr				No	
Windows Firewall Remote Management				No	
Windows Management Instrumentation (WMI)				No	
U Windows Media Player		Ц		No	
Windows Media Player Network Sharing Service		H		No	
Windows Media Player Network Sharing Service		H		NO	
Windows Peer to Peer Collaboration Foundation		H		NO	
Windows Remote Management		H	H	NO	
U Willeless For table Devices				110	•
		1	Detaiļs	. Remove	:
			Allow a	nother p <u>r</u> ogram.	
		1	OK	Cance	el

Provided the corresponding user permissions have been set, *Change Settings* enables you to edit the settings for programs and features. Windows 7 manages three different types of networks (Domain, Home/Work, Public). You need to define the firewall exceptions separately for each type. Define the following exceptions by setting the corresponding checkmarks in the *Allowed Programs and Features* list.

- File and Printer Sharing
- Windows Management Instrumentation (WMI)

Accept the new settings by clicking the OK button. These firewall settings enable Docusnap to scan the computer.

## Windows Vista

# Windows Vista: Starting the Windows Firewall Configuration from the Command Line

The easiest way to configure the firewall is by executing the *firewall.cpl* command.

There are several ways to enter this command:

- > Click Start Search and enter firewall.cpl
- > Click Run and enter firewall.cpl

Notart 🚺

Internet     Internet Explorer     E-mail     Windows Mail	
Welcome Center Backup Status and Configuration Windows Media Player Small Business Resources Windows Fax and Scan	ham Documents Pictures Music Recent Items Computer
All Programs	Network Connect To Control Panel Default Programs Help and Support Run
A Programs	
Start Search	

Alternatively, you can enter the command from a console window:





Clicking *Allow a program through Windows Firewall* takes you to the configuration dialog for exceptions.

## Windows Vista: Starting the Windows Firewall Configuration Interactively



Click the *Start* button and select *Control Panel*:

Internet     Internet Explorer     E-mail     Windows Mail	
Welcome Center	ham
Backup Status and Configuration	Documents
	Pictures
Windows Media Player	Music
Small Business Resources	Recent Items +
Windows Fax and Scan	Computer
	Network
	Connect To
	Control Panel
	Default Programs
	Help and Support
All Programs	Run
Start Search	0

Click Allow a program through Windows Firewall:



# Windows Vista: Setting Windows Firewall Exceptions

👹 Windows Firewall Settings 🛛 🔀			
General Exceptions Advanced			
Exceptions control how programs communicate through Windows Firewall. Add a program or port exception to allow communications through the firewall.			
Windows Firewall is currently using settings for the private network location. What are the risks of unblocking a program?			
Program or port			
Secure Socket Tunneling Protocol			
SNMP Trap			
Windows Collaboration Computer Name Registration Service			
Windows Firewall Remote Management			
Windows Management Instrumentation (WMI)			
Windows Media Player			
Windows Media Player Network Sharing Service			
Windows Meeting Space			
Windows Peer to Peer Collaboration Foundation			
Windows Remote Management			
Add program Add port Properties Delete			
IVOUTY me when Windows Firewall <u>b</u> locks a new program			
OK Cancel Apply			

Define the following exceptions by setting each the checkmarks in the *Program or port* list:

- File and Printer Sharing
- Windows Management Instrumentation (WMI)

Now, confirm the selected settings by clicking the *Apply* and *OK* buttons. These firewall settings enable Docusnap to scan the computer.

Windows XP (SP2 and higher)

## Windows XP: Starting the Windows Firewall Configuration

The quickest way to open the firewall configuration dialog is by using the *firewall.cpl* command (from the command line or through Start | Run).



# Windows XP: Setting Windows Firewall Exceptions

#### Click on the *Exceptions* tab.

🍃 Windows Firewall	×
General Exceptions Advanced	
Windows Firewall is blocking incoming network connections, except for the programs and services selected below. Adding exceptions allows some program to work better but might increase your security risk.	ms
Programs and Services:	
Name	
✓ File and Printer Sharing	
✓ Network Diagnostics for Windows XP	
UPnP Framework	
Add Program Add Port Edit Delete	
Display a notification when Windows Firewall blocks a program	
What are the risks of allowing exceptions?	
OK Can	cel

Define the following exceptions by setting corresponding checkmarks in the *Programs and Services* list:

#### File and Printer Sharing

Confirm your selection by clicking the *OK* button. Now, you can close the Windows firewall dialog.

# Windows XP: Enabling Additional Exceptions using GPOs – Launching the GPO Editor

In the list of Windows XP exceptions, the *Windows Management Instrumentation (WMI)* exception, available in the Windows Vista and Windows 7 firewall exceptions lists, is missing.

To enable this exception, define the following group policy setting in Windows XP: Set the *Allow Remote Administration* firewall exception in the local group policy settings. To start the group policy editor, enter *gpedit.msc*, either from the command line or through Start | Run.

The group policy to be activated is located under:

Local Computer Policy

- Computer Configuration
  - Administrative Templates
    - Network
      - Network Connections
        - Windows Firewall
        - Domain Profile



### Windows XP: Enabling Additional Exceptions using GPOs

#### Windows Firewall group policy:

Enable the *Windows Firewall*: allow remote administration exception group policy and set the scope for the settings in the corresponding field. Then close the dialog by clicking the *OK* button.

#### Allow unsolicited incoming messages from:

• Entering an asterisk in the entry field opens the firewall for any computer.

- The exception applies to a specific subnet only (e.g. the entire class C network mask 192.168.100.0/24).
- Access to the local subnet may also be granted by entering the *localsubnet* string.
- It is also possible to restrict the exception to a specific computer (e.g. 192.168.100.10).
- Now, you can close the application. This completes the configuration of the Windows firewall exceptions for Windows XP.

Windows Firewall: Allow remote administration exception Prop? 🗙
Setting Explain
Windows Firewall: Allow remote administration exception
Not Configured
Enabled
O <u>D</u> isabled
Allow unsolicited incoming messages from:
localsubnet
Syntax:
Type """ to allow messages from any network, or
else type a comma-separated list that contains
any number or combination of these:
IP addresses, such as 10.0.0.1
Subnet descriptions, such as 10.2.3.0/24
The string "localsubnet"
Supported on: At least Microsoft Windows XP Professional with SP2
Previous Setting Next Setting
OK Cancel Apply

# Windows Firewall Configuration: Active Directory

## Basics: Firewalls & the Group Policies Management Console (GPMC)

If you need to configure the firewall for multiple computers, it is recommended to use a GPO. The settings apply to Windows XP SP2 and higher. You do not need to define special Windows firewall exceptions for Vista or Windows 7 computers.

The following example shows how to define a domain-wide setting using the Microsoft Group Policy Management Console (GPMC) tool. GPO settings can be made at the local (L), site (S), domain (D) and organizational unit (OU) levels. Subsequent settings always overwrite the previously defined values. The hierarchy is L, S, D, OU.

You can download the Group Policy Management Console tool from the Microsoft website free of charge. In the following example, this tool will modify the firewall settings for all systems in the domain. For this reason, it should be used with caution.

## AD Windows Firewall Configuration: Launching GPMC

The easiest way to open the Group Policy Management dialog for firewall configuration is by entering the *gpmc.msc* command, either from the command line or through Start | Run.



# AD Windows Firewall: Creating Group Policy Objects for the Domain

Right-click the desired *domain* and select the *Create and Link a GPO Here*... option from the context menu.

Signoup Policy Management	l×
Sig Eile Action View Window Help	$\mathbf{X}$
Group Policy Management Group Policy Management Create and Link a GPO Here GPO Enforced Link Enabled GPO Status WMI GPO Enforced Link Enabled GPO Status WMI GPO Enforced Link Enabled None Block Inheritance Group Policy Modeling Wizard New Organizational Unit Sates Group Policy F Search Change Domain Controller New Window from Here Refresh Properties Help	
	<u> </u>

# Enter a descriptive name for the GPO.

StyGroup Policy Management
Sig Eile Action View Window Help
Group Policy Management Porest: dsdemo.local Commins Commins Commin Controllers Commin Controllers Commin Controllers Comp Policy Dipects Comp Policy Objects Commin Controllers Commin Controllers

# AD Windows Firewall: Editing a Group Policy Object

Group Policy Management <u>\_ D ×</u> \_8× <sup>Cl</sup>을 Elle Action View Window Help ⇔ → | 🗈 🔃 🔮 😭 Group Policy Managemen dsdemo.local E G Domains Linked Group Policy Objects Group Policy Inheritance Delegation E dsdemo.local Enforced Link Enabled GPO Status WMI Filter Modified Domain Link Order + GPO Default Domain Policy
 Windows Firewall Exception
 Domain Controllers Default Domain Polic 4/21/.. dsdemo.local 숲 Enabled None ws Firewall Ex Enabled None 4/21/ Edit Group Policy Objects
 WMI Filters Enforced ✓ Link Enabled Group Policy Modeling
 Group Policy Results Save Report. Delete Rename Refresh

Right-click the previously created group policy object and then select *Edit*.

The Group Policy Object Editor dialog opens where you can edit your group policy object.



The group policy to be activated is located under:

Local Computer Policy

- Computer Configuration
  - Administrative Templates
    - Network
      - Network Connections
        - Windows Firewall
          - Domain Profile

# AD Windows Firewall: Enabling the File and Printer Sharing Exception

Enabling the Windows Firewall: Allow file and printer sharing exception

In this example, enabling the firewall exception is restricted to the local subnet.

Not Configu	red			
• Enabled				
Disabled				
Allow unsolicit	ed incoming	) messages l	from:	<u>^</u>
local:ubnet				-
Syntax				
Type """ to al	ow message	es from any i	network, or	
else type a co	mma-separa	sted list that	contains	
any number o	combinatio	n of these:		
IP addresse	s, such as 1	0.0.0.1		
Subnet des	criptions, sur	ch as 10.2.3	.0/24	
The string "	ocalsubnet'			-

# AD Windows Firewall: Enabling the Remote Administration Exception

Enabling the Windows Firewall: Allow remote administration exception

In this example, enabling the firewall exception is restricted to the local subnet.

Not <u>C</u> onfigured			
Enabled			
5 mi			
Disabled			
Allow unsolicited incoming met	sages from:		
localsubnet			
Syntax			
Type """ to allow messages fro	m any network, o	or	
else type a comma-separated l	st that contains		
any number or combination of	hese:		
IP addresses, such as 10.0.0	.1		
Subnet descriptions, such as	10.2.3.0/24		
The string "localsubnet"			-
	ft Windows XP i	Professional with	n SP2

# AD Windows Firewall: Enabling the ICMP Exceptions

*Windows Firewall: Allow ICMP exceptions* (inbound echo request). This exception is required for Windows Server 2008.

💭 Windows Firewall: Allow ICMP exce	ptions I I I I I I I I I I I I I I I I I I I
Windows Firewall: Allow ICMP exce	ptions Previous Setting Next Setting
<ul> <li>Not Configured</li> <li>Comment:</li> <li>Enabled</li> <li>Disabled</li> <li>Supported on:</li> </ul>	At least Windows XP Professional with SP2
Options:	Help:
<ul> <li>Allow outbound destination unreach</li> <li>Allow outbound source quench</li> <li>Allow redirect</li> <li>Allow inbound echo request</li> <li>Allow inbound router request</li> <li>Allow outbound time exceeded</li> <li>Allow outbound parameter problem</li> <li>Allow inbound timestamp request</li> <li>Allow inbound mask request</li> <li>Allow outbound packet too big</li> </ul>	Defines the set of Internet Control Message Protocol (ICMP)         message types that Windows Firewall allows. Utilities can use         ICMP messages to determine the status of other computers. For         example, Ping uses the echo request message. If you do not         enable the "Allow inbound echo request" message type, Windows         Firewall blocks echo request messages sent by Ping running on         other computers, but it does not block outbound echo request         messages sent by Ping running on this computer.         If you enable this policy setting, you must specify which ICMP         message types Windows Firewall allows this computer to send or         receive.         If you disable this policy setting, Windows Firewall blocks all the         listed incoming and outgoing ICMP message types. As a result,         utilities that use the blocked ICMP message swill not be able to         send those messages to or from this computer. If you enable this         policy setting and allow certain message types, then later disable         this policy setting, Windows Firewall deletes the list of message         this policy setting, Windows Firewall deletes the list of message
	OK Cancel Apply