Docusnap 6.3 - User Manual

English Version

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Part I

1 Welcome

Welcome to Docusnap 6.3

Thank you very much for purchasing Docusnap 6.3.

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 6.3 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 6.3 supports the reporting of the results using several standardized formats (Microsoft Word & Excel, PDF and HTML files, among others).

Docusnap 6.3 generates meaningful and real-world reports and analyzes of the most diverse corporate departments.

In no time, Docusnap 6.3 analyzes effective permissions, compares the expected and actual states of installed licenses and provides additional organizational features, such as password and contract management.

Docusnap 6.3 combines optimum usability with maximum flexibility. Wizards guide the user through the intuitive user interface which is similar to Microsoft Office 2013.

Multiple users can work with Docusnap 6.3 concurrently. Customization to individual requirements is also possible.

1.1 Changes in Docusnap 6.3

Veeam Enterprise

New in Docusnap is the inventory of Veeam Enterprise.

Optimized License Management

The license management has been optimized and the user friendliness increased.

Support BackupExec 2015

Docusnap now inventories and documents Symantec Backup Exec 2015 installations.

Create Network Maps without Microsoft Visio

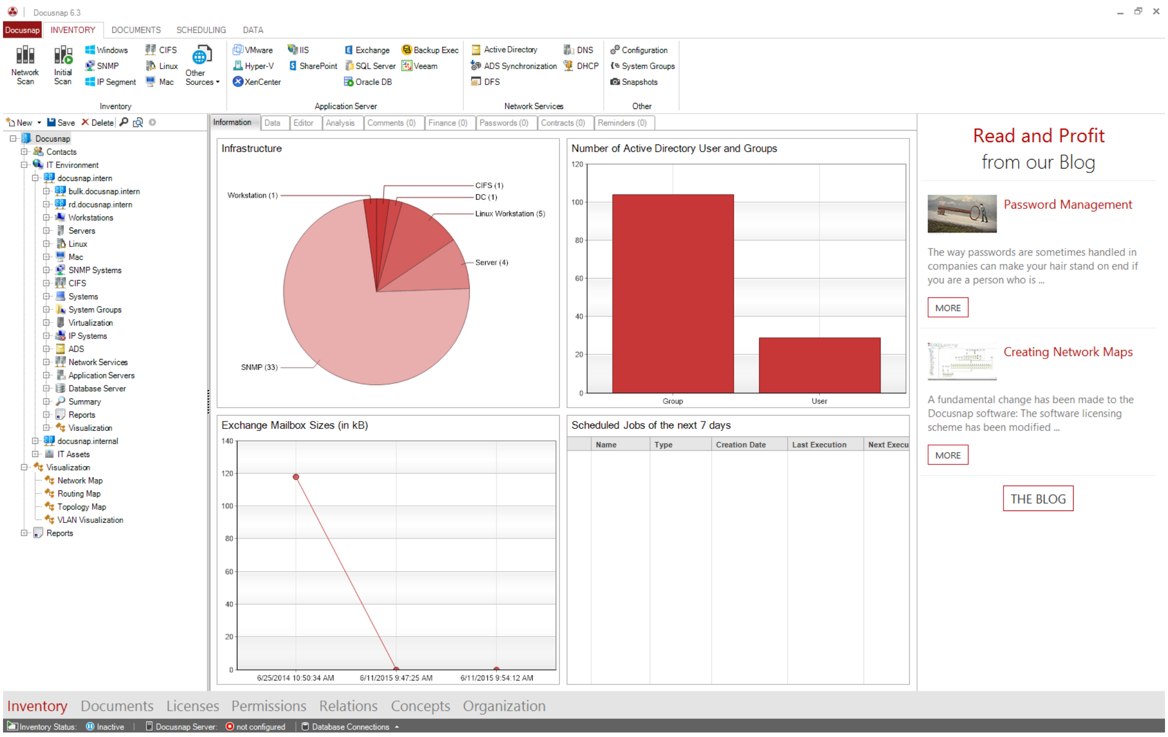
Network maps can be created without a Microsoft Visio installation.

Part II

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

Docusnap Features

Automated, agent-free network inventory and IT documentation

Client / Server Operating Systems

Comprehensive IT documentation and inventory of all hardware and software

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

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

Application Servers

Efficient documentation of business-critical applications

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

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

Infrastructure

Inventory and documentation of entire IT networks

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

Active Directory Services	DNS, DHCP and DFS	SNMP
Locations, Domain Structures	Scopes, Active Leases	SNMP V1/V2/V3

Logical ADS Structure	DHCP Maps	Layer 2 Topology
Group Policies	Forward Zones, DNS Records	Third-party MIBs

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

IT Analysis

Efficient analysis of permissions and licenses

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

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

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

Customization and Ease of Use

Tailor and extend Docusnap to suit your requirements

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

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

2.2 Conventions

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

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

Code samples are formatted in `Courier New`.

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

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

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

2.3 System Requirements

System requirements for the installation of Docusnap 6.3

Operating Systems	Windows Vista, Windows 7, Windows 8, Windows 10 Windows Server 2008 / 2008 R2, Windows Server 2012 / 2012 R2
RAM	>512 MB, recommended 1 GB
Resolution	1024 x 768 min., recommended > 1280 x 1024
.Net Framework	Version 4.6.1

Windows Installer	Version 2.0
Database	SQL Server 2005 Express / Standard / Enterprise / R2 (Service Pack 4)
	SQL Server 2008 Express / Standard / Enterprise / R2
	SQL Server 2012 LocalDB / Express / Standard / BI / Enterprise / R2
	SQL Server 2014 LocalDB / Express / Standard / BI / Enterprise
Overview Maps	IE ab 9, Firefox ab 31, Chrome ab 31
	Optional: MS Visio ab 2007 (Service Pack 1) / 2010 / 2013

No external programs are required for generating documents and maps.

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

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

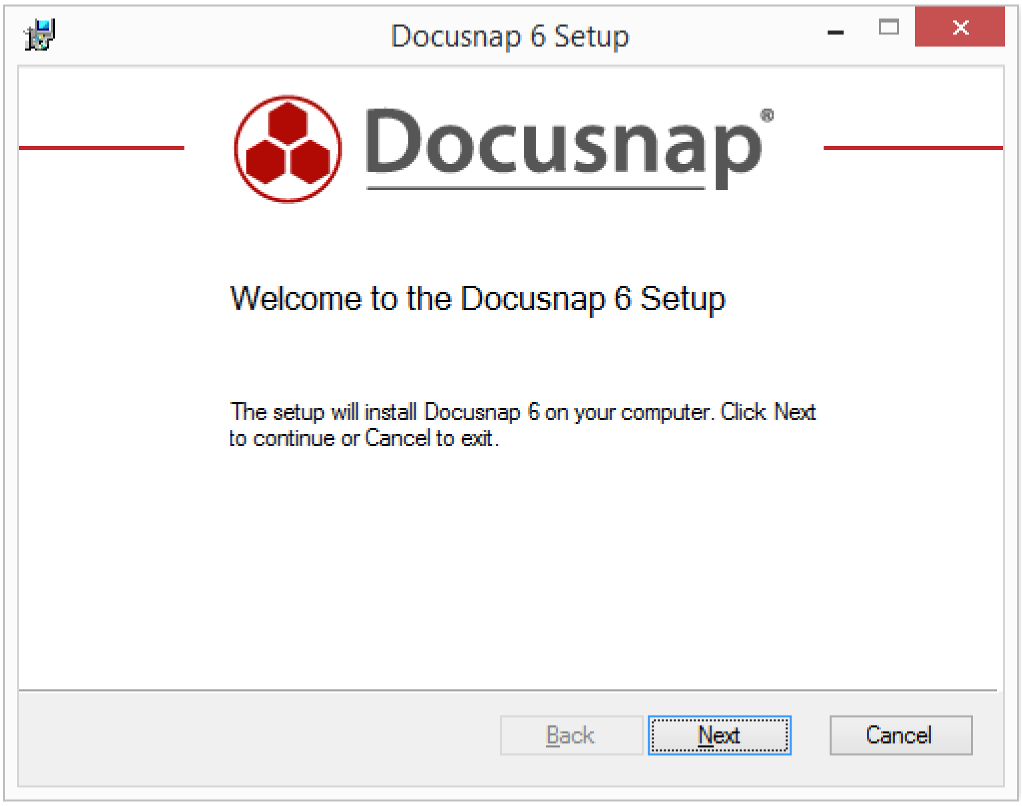
Inventory Process

Operating Systems	Windows NT, XP, Vista, Windows 7, Windows 8, Windows 10
	Windows Server NT, 2000, 2003, 2008, 2008 R2, 2012, 2012 R2
	Linux (32 / 64 Bit) – SuSe, RedHat, Debian, Kubuntu, Ubuntu
	Mac OS X
Network Protocols	WMI
	LDAP (v.2)
	SNMP Version 1,2,3
	SSH
Exchange Server	2003, 2007, 2010, 2013
MS SQL Server	2000, 2005, 2008, 2008 R2, 2012, 2012 R2, 2014

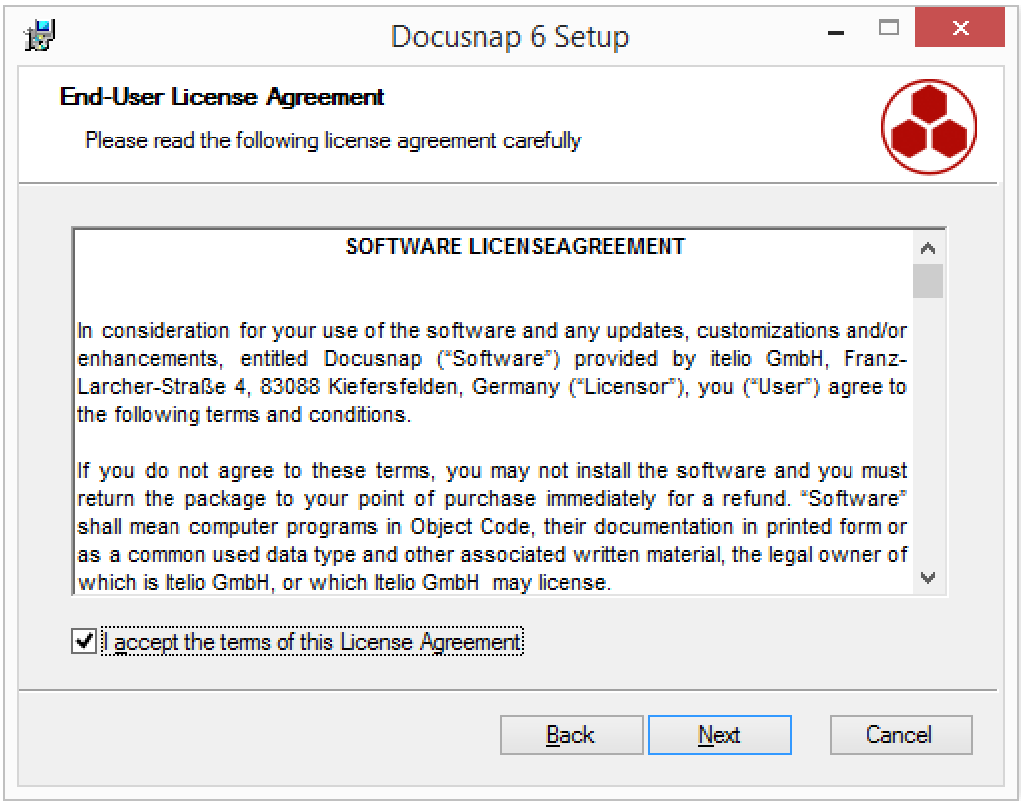
Permission Analysis	Windows Systeme or CIFS/SMB emulations and Microsoft SharePoint Installations as well as Exchange 2007, 2012, 2013
VMware	Virtual Center 3.5/4.0/5.0, ESX Server 3.5/4.0/5.0/5.5 and VMware Server
DHCP/DNS	only Windows-based systems
Hyper-V	only Windows-based systems
XenCenter	
VEEAM	VEEAM 8
Microsoft IIS	Versions 6.0, 7.0, 7.5, 8.0, 8.5
Microsoft SharePoint	SharePoint Server 2007/2010/2013, SharePoint Services 3.0, Microsoft SharePoint Foundation
Backup Exec	Version 2010, 2012, 2015
Oracle	Version 10, 11g, 12c

2.4 Installation

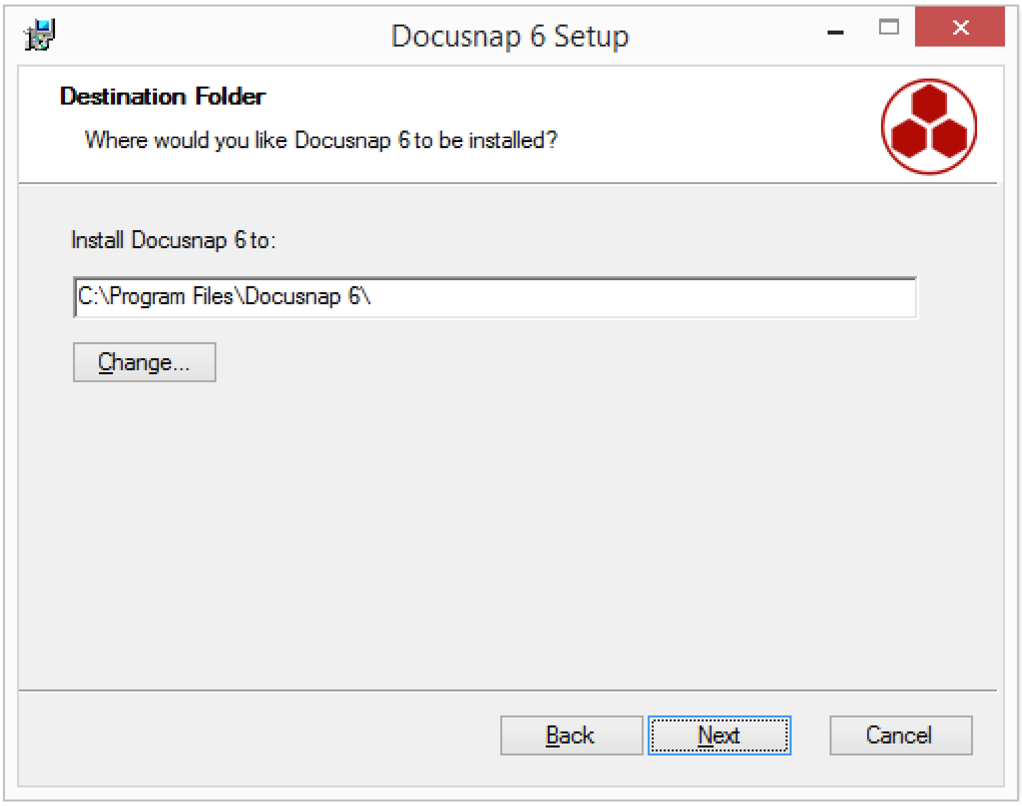
Executing the Docusnap.exe file starts the installation process for Docusnap 6.3.



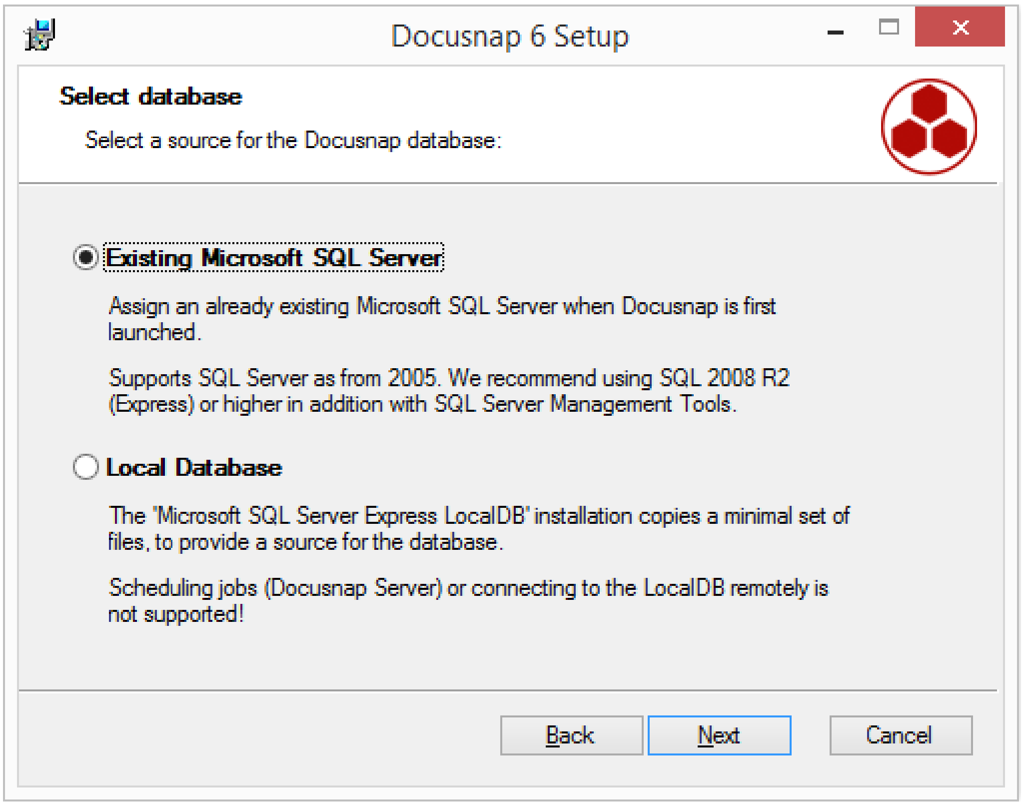
The *Next* button will only be enabled after license agreement has been accepted.



The next step lets you specify the Docusnap installation directory.

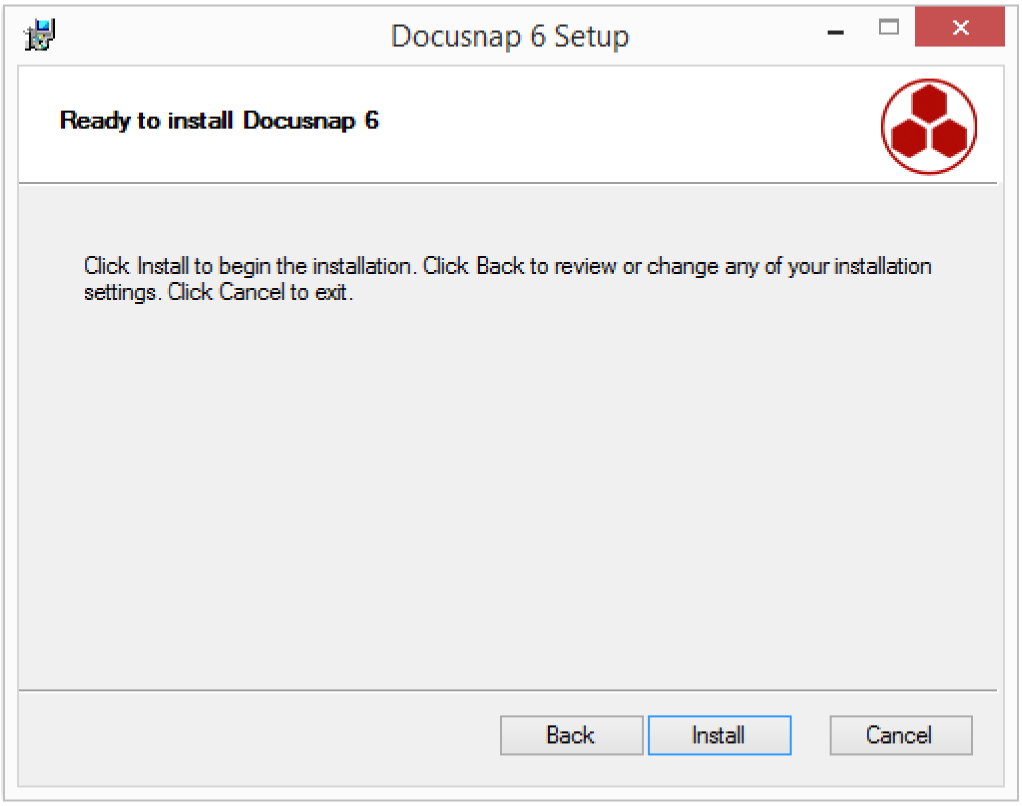


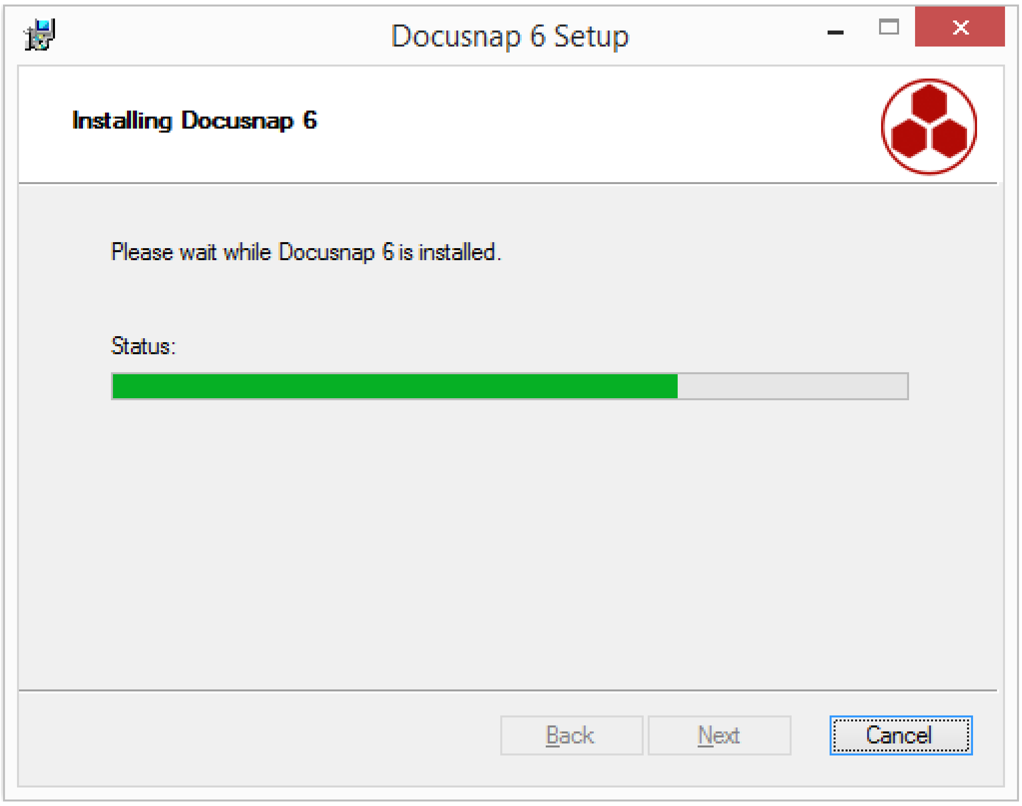
After the desired folder has been selected, the installation process can be started.

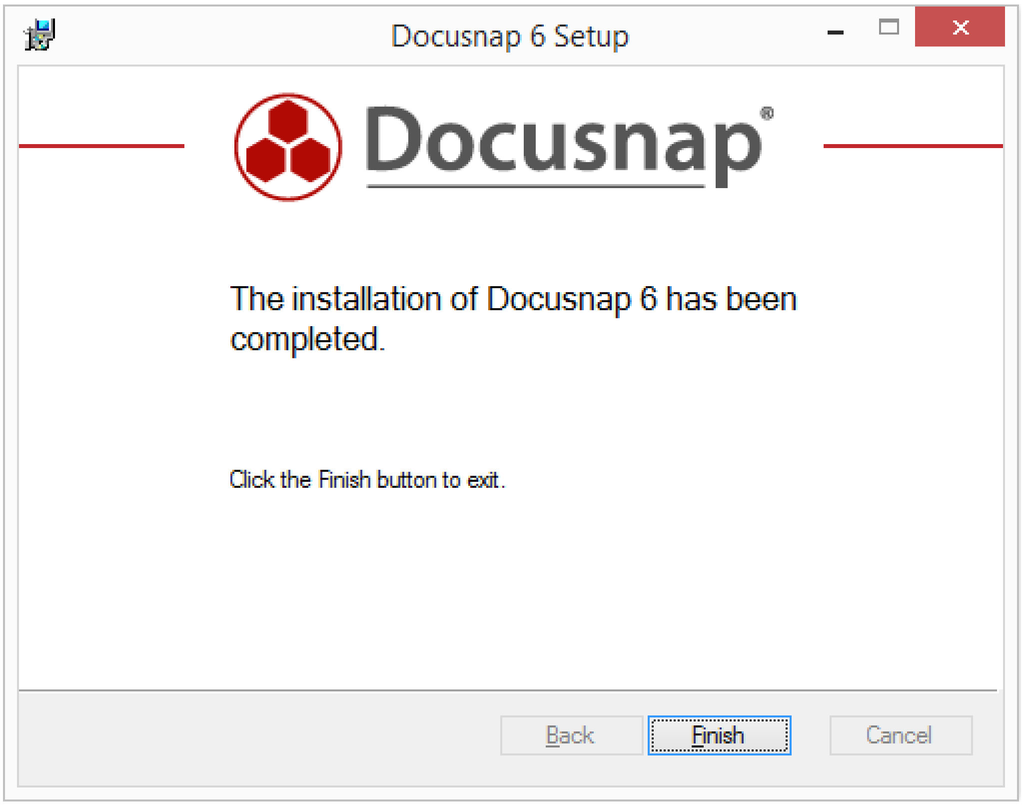


If the local database does not exist on the system, it can be created during the installation of Docusnap. The local database (Microsoft Server Express LocalDB) is a simplified version of SQL Server that can be used without having to perform complex or time consuming configurations.

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


Docusnap 6 Setup
Ready to install Docusnap 6
Click Install to begin the installation. Click Back to review or change any of your installation settings. Click Cancel to exit.
Back
Install
Cancel


Docusnap 6 Setup
Installing Docusnap 6
Please wait while Docusnap 6 is installed.
Status:
Back
Next
Cancel



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

With the command line /EXTRACTMSI:<path and file name>, the MSI file can be extracted.
Docusnap.exe /EXTRACTMSI:“C:\ExtractFolder\Docusnap.msi”

The MSI file is in German, when the English version is required, the language file can also be created using the command /EXTRACTMST:<path and file name>.
Docusnap.exe /EXTRACTMST:“C:\ExtractFolder\english.mst”

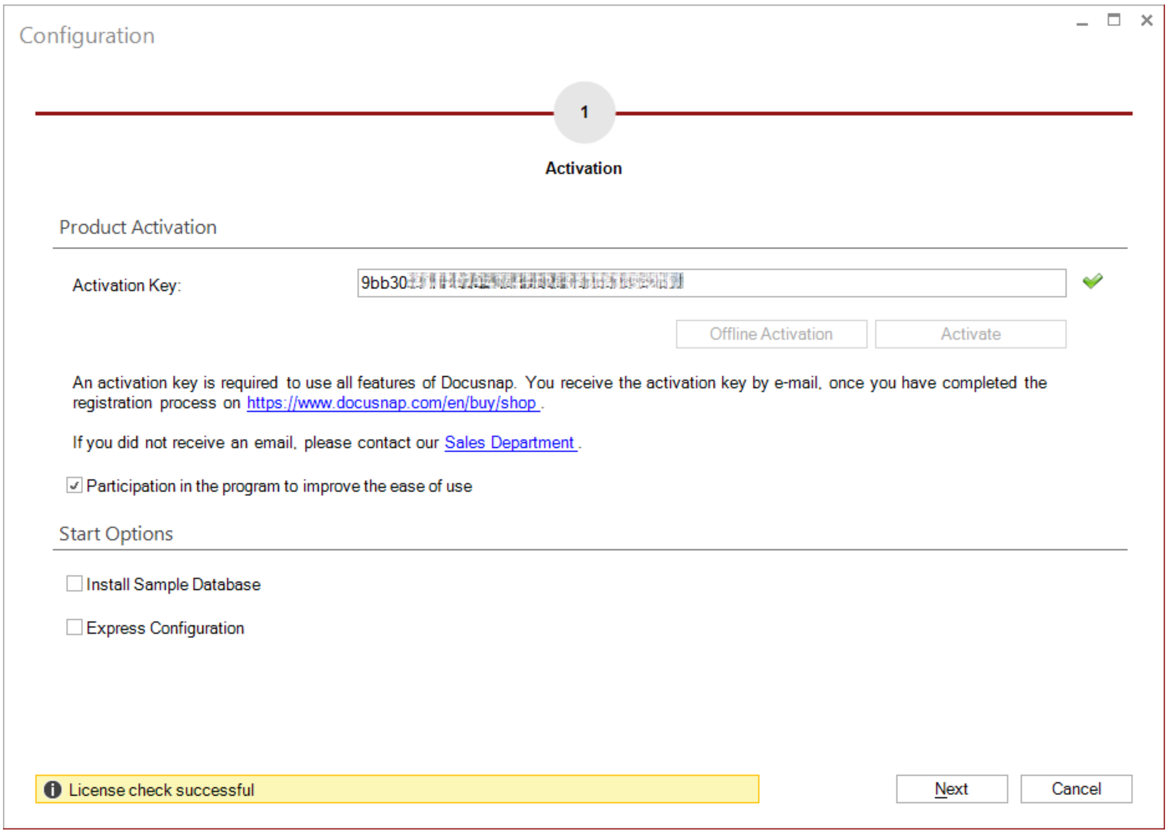
/EXTRACTMSI and /EXTRACTMST works only in capital letters. The parameter must be the full path including the filename of the exported MSI-File.

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

2.5 Getting Started

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

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



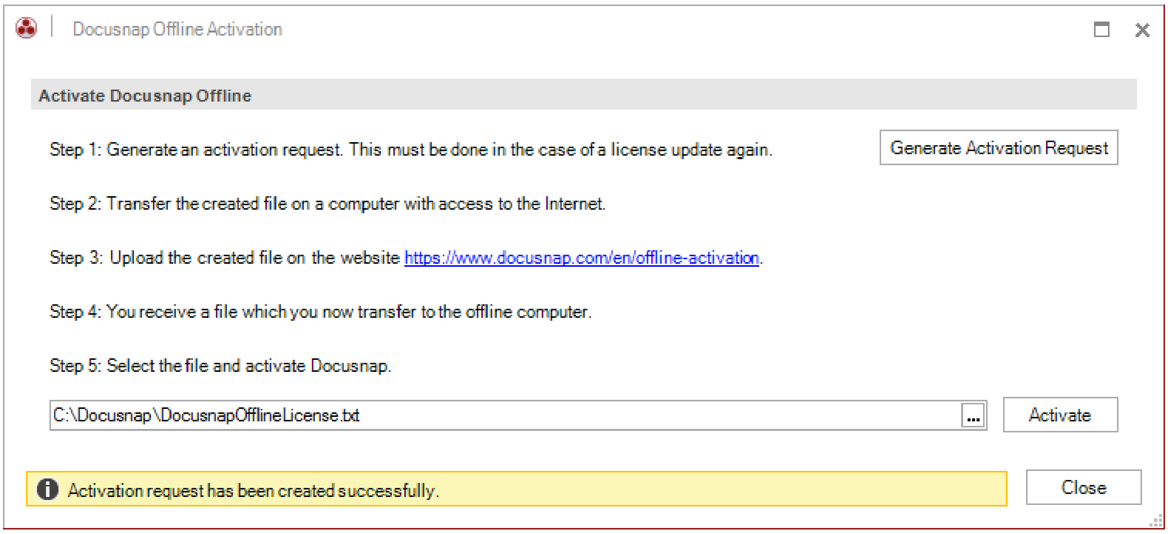
Insert in the Activation Key field the activation key received by e-mail. Click the Activate button, to check the license for validity.

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

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

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

Should modifications to the license setup be required, such as the extension of the number of licensed systems, the complete process of generating an activation request file, uploading it and importing the license file has to be repeated. Accordingly, the same steps are required if, for example, the virtual machine was reset.



Following the successful activation of Docusnap proceed with the configuration. Here you can choose between the Express configuration and start the configuration wizard. In the Express configuration, the default settings are used for paths etc. and Docusnap starts immediately.

If the creation of the local database is performed during the installation of Docusnap, it is used automatically for the Express configuration. If not, a dialog for choosing between the local database and SQL Server opens.

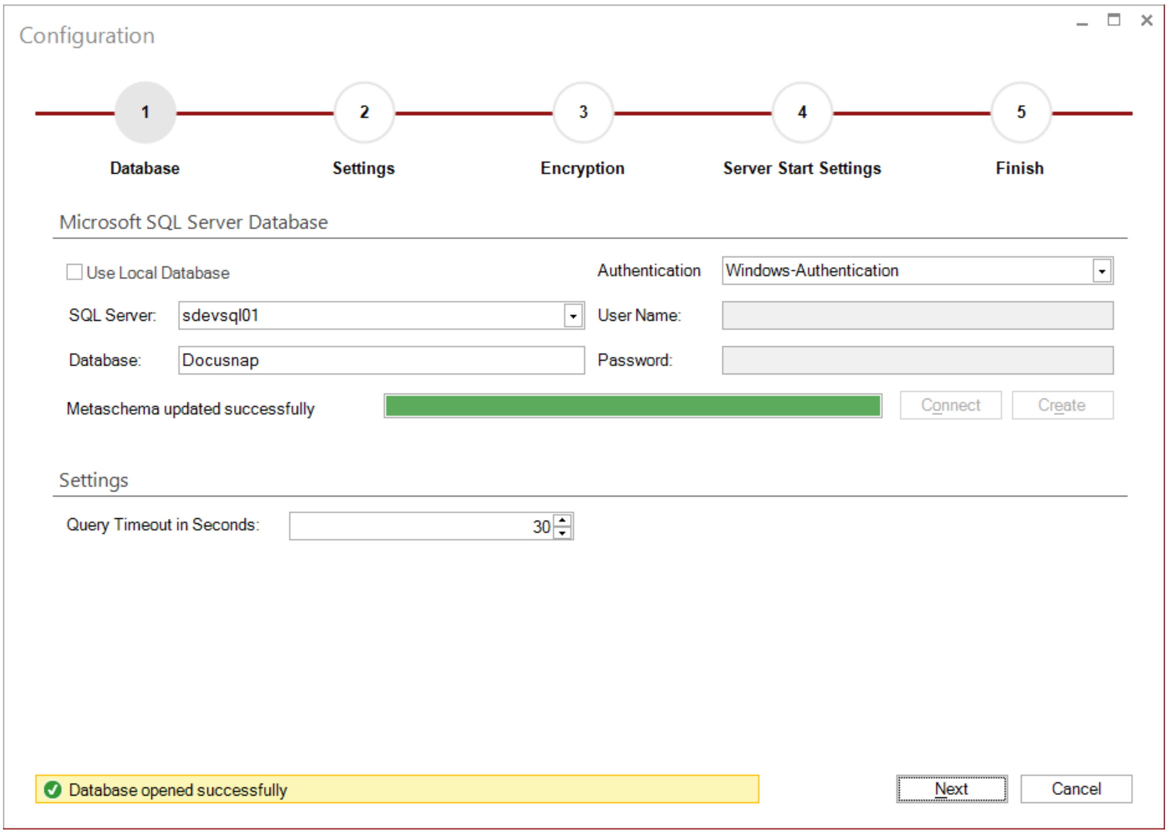
If *Install Sample Database* is selected a database which already contains sample data is created. If the sample database is not selected, an empty Docusnap database is created. For the database the name *Docusnap* is used. For the sample data Docusnap always creates a new database.

Configuration Wizard

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

- **Microsoft SQL Server**
  Compatibility: SQL Server 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.
- **Local Database (Microsoft Server Express LocalDB)**
  If the local database does not already exist on the system, it can be created as

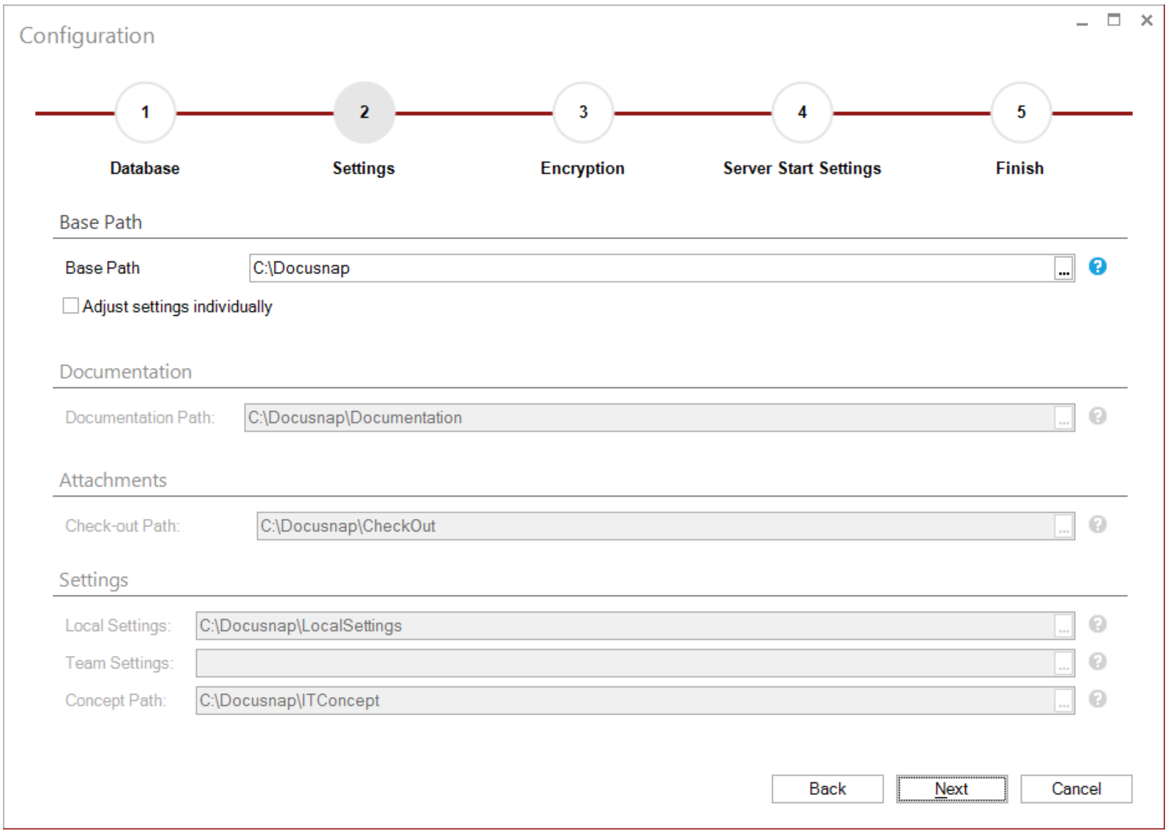
part of the Docusnap installation.



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

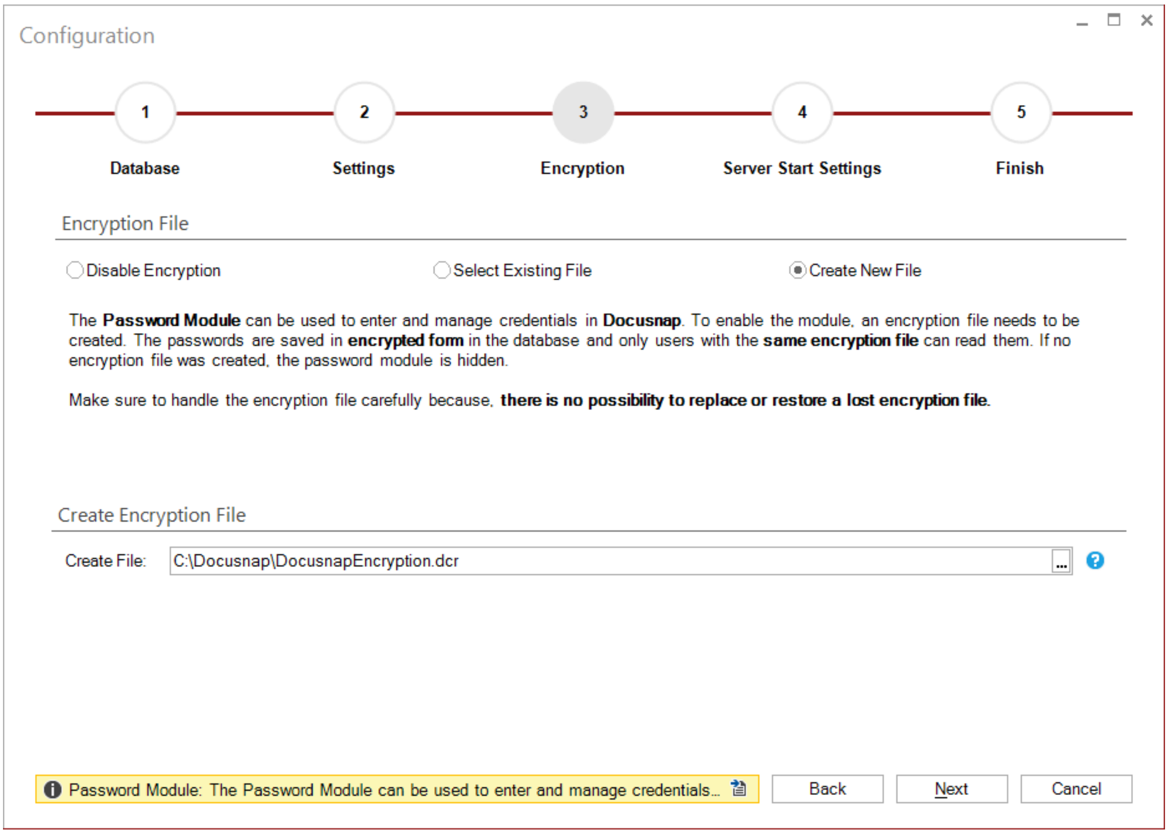
Base Path: A base path can be selected, in which the respective folders are created and in which then the data is stored. Through the *Adjust settings individually* checkbox, the paths can also be change individually.

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



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

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

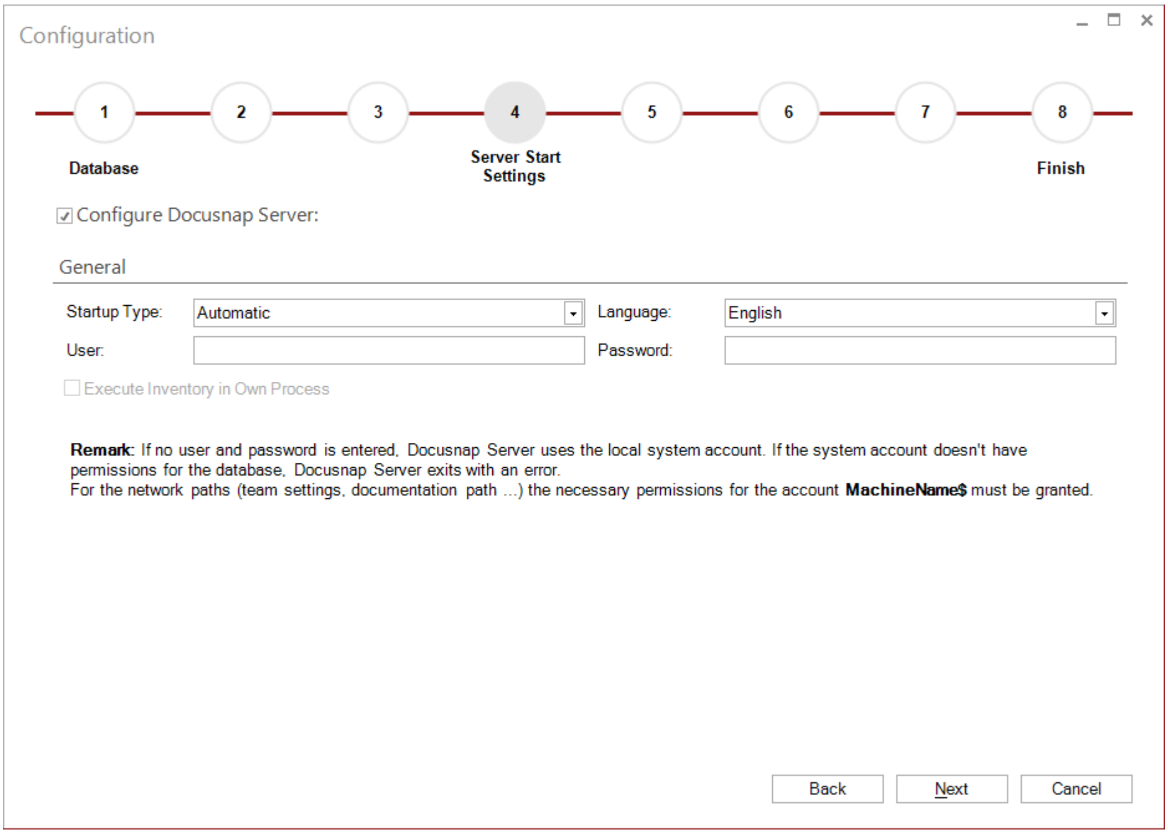


The Startup wizard also allows you to configure Docusnap Server. Enable the *Configure Docusnap Server* checkbox to display the steps for the Docusnap Server configuration.

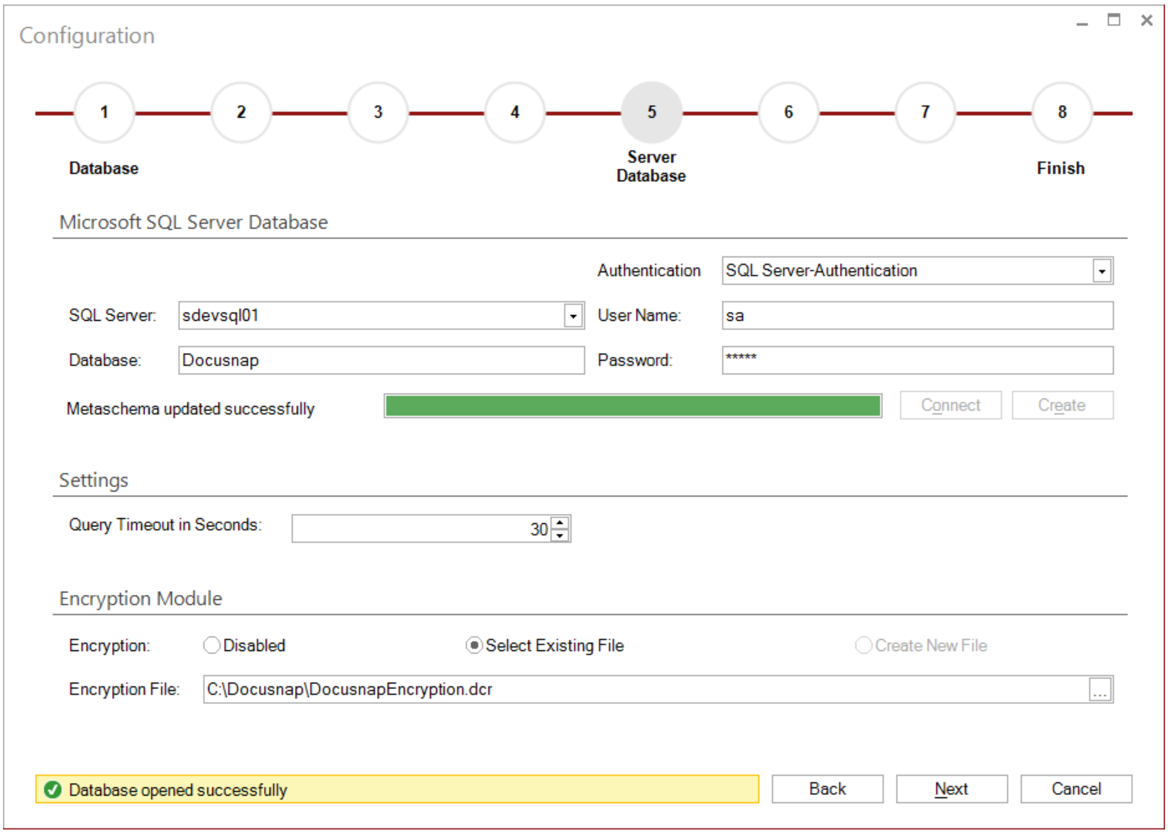
The *Startup Type* in the step *Server Start Settings* determines whether the Docusnap server is started automatically or manually.

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

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



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

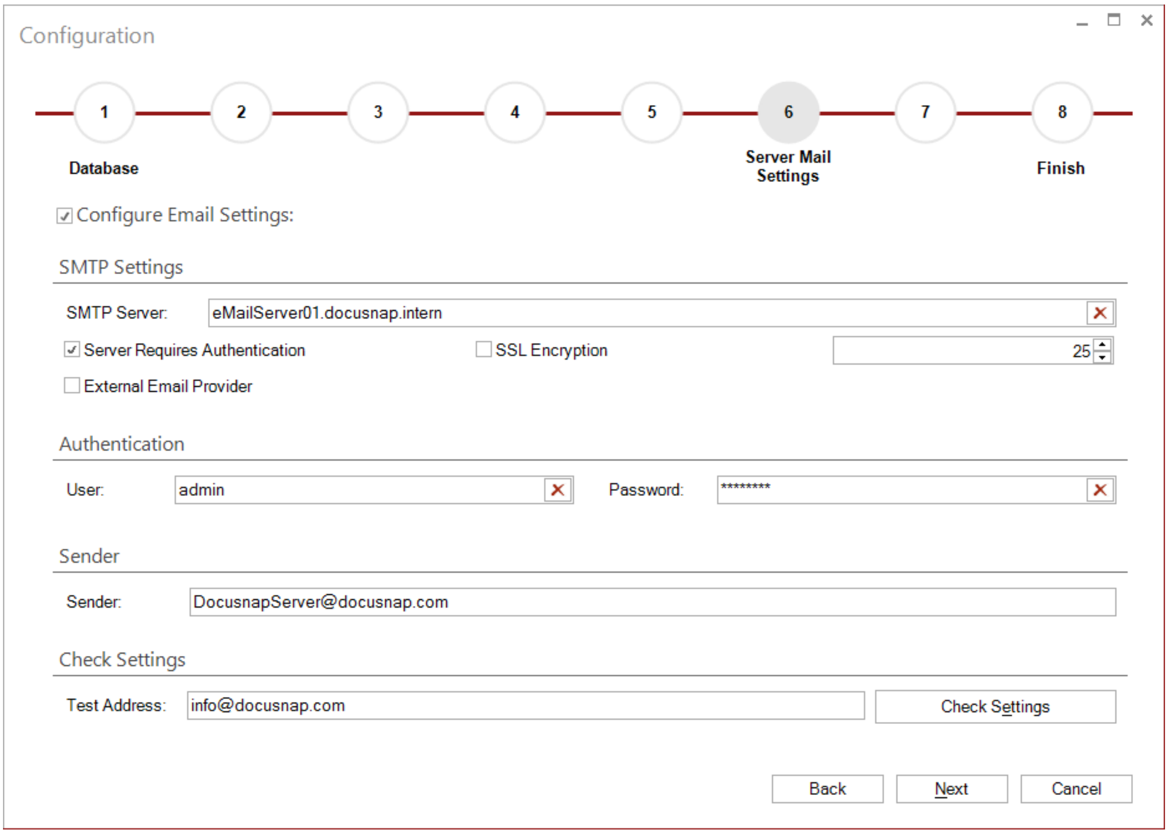


Docusnap provides notifications for particular areas, e.g. when a contract has expired. These notifications are sent out by e-mail.

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. With an *External Email Provider* no separate domain information in the credentials is used (not required for user authentication from external providers).

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.



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

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

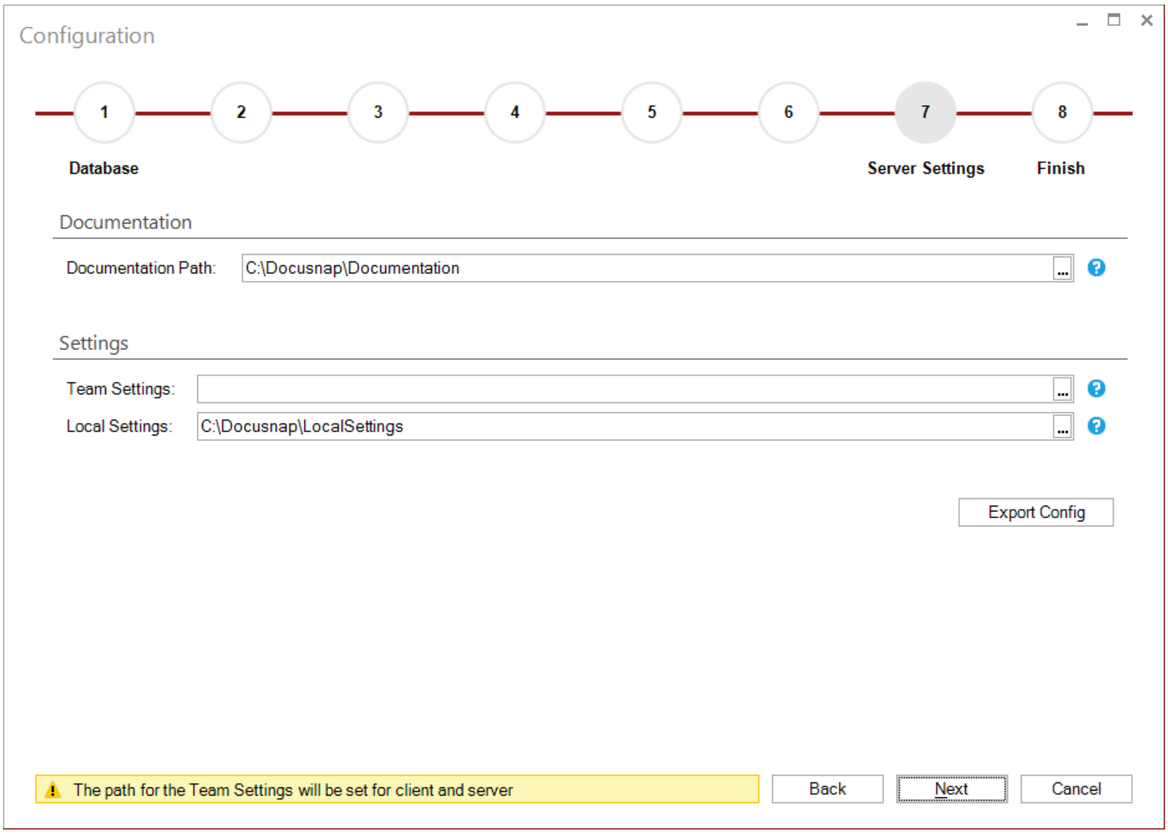
Windows service.

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

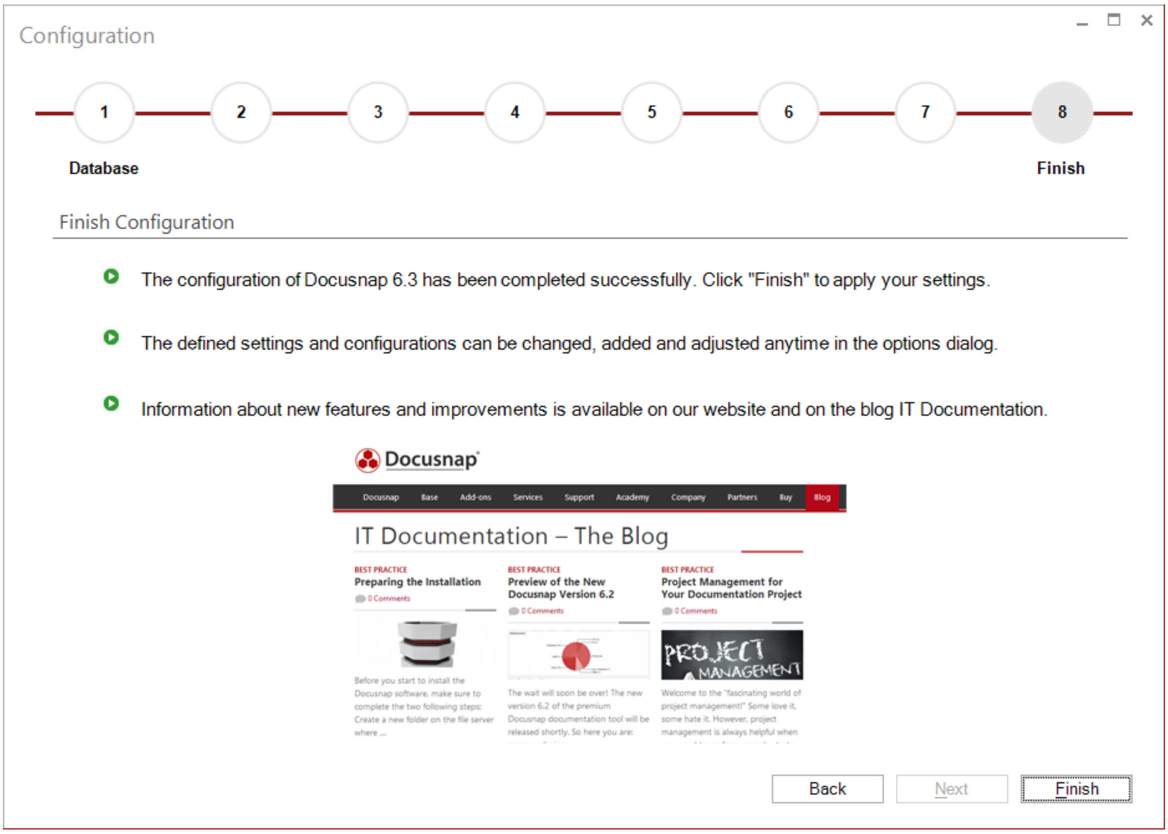
The IT concepts you create are saved under Documentation path.

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

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



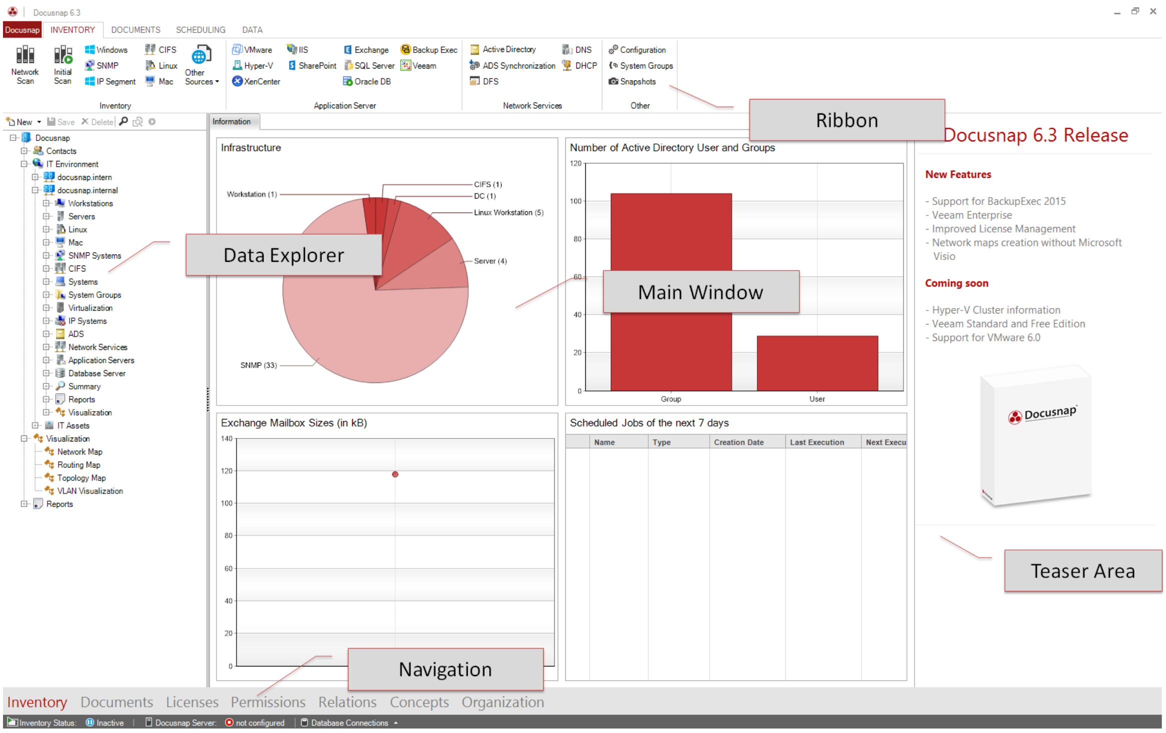
When all settings have been defined, the configuration is complete.



Once you have completed the configuration, Docusnap 6.3 will start automatically.

2.6 User Interface

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



Ribbon

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

Data Explorer

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

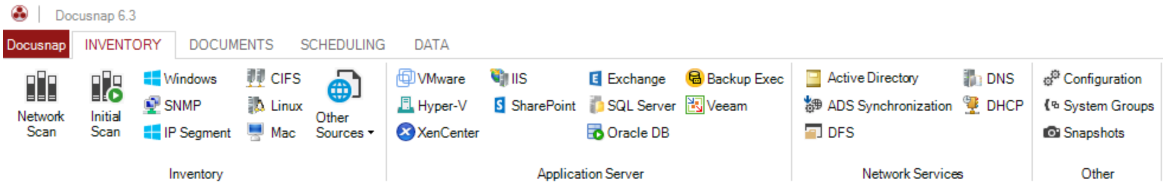
Main Window

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

The main window displays data for the objects selected in the Data Explorer. Additional information can be specified using data entry screens in the editor. 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.

2.6.1 Menu Ribbon

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



Inventory

Documents

Scheduling

Data

Licenses

Permissions

Relations

Concepts

Organization

Reporting

Concept Editor

2.6.1.1 Docusnap Menu

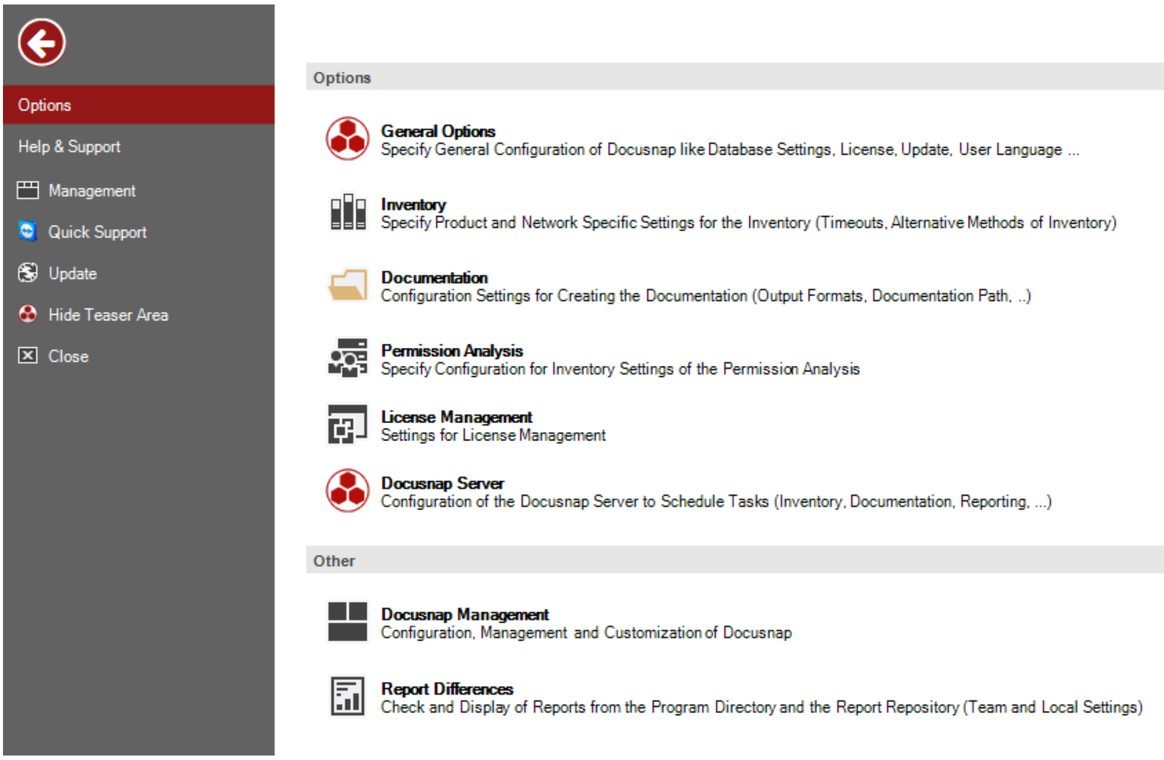
Options

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

Permission Analysis dialog allows you to specify the number of folder levels to be scanned. This can, for example, be helpful if at a certain level the permissions are only inherited.

- License Management: The options *Include Mac Software Products*, *Include Linux Software Products* and *Include Unkonwn Software Products* in the Configuration - *License Management* dialog define if software products of a particular operating system should be excluded from the license management.
- Docusnap Server: Click the *Docusnap Server* button to start the wizard for configuring the Docusnap Server.

- Docusnap Management: Click the *Docusnap Management* button to open the *Docusnap Management*.
- Report Differences: This dialog displays for which reports a customized version has been created and which is used.



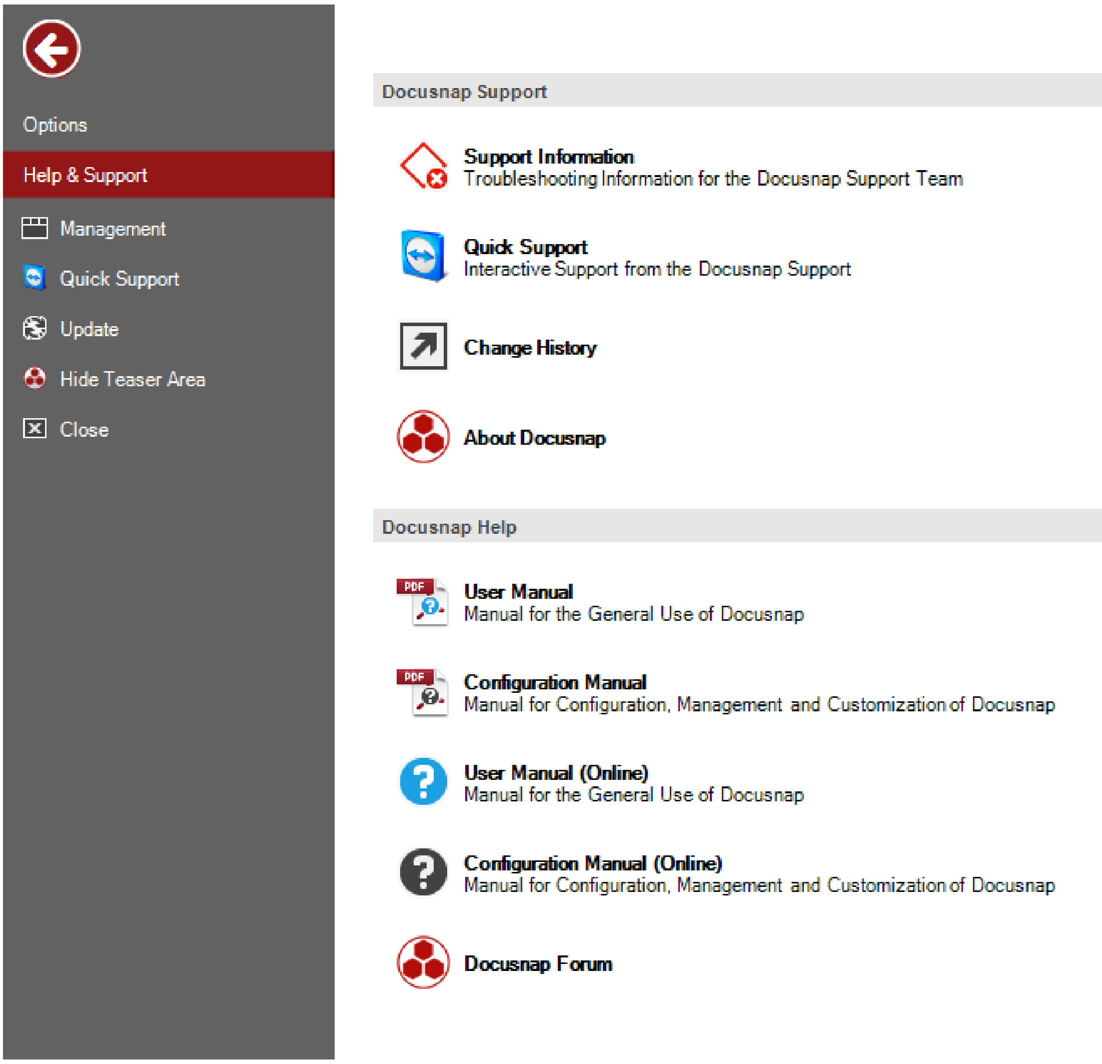
Help & Support

- Support Information: By clicking the *Support Information* button, you open a dialog that allows you to create and send information for troubleshooting.
- Quick Support: Support in the form of remote maintenance is an option for problems and questions. Clicking the *Quick Support* button, starts the "TeamViewer" client. It displays an ID and a password that you must tell to our support staff so that the support team member can connect to your computer.

After the connection with the support team member has been established, control of the screen can be transferred.

- Change History: Click the *Change History* button to open a dialog that shows the change log, i.e. the changes and enhancements introduced with the last versions of Docusnap.
- About Docusnap: A click on the *About Docusnap* button displays a window with information about the program. For example, the current version number will be displayed.

- User Manual: Click this button to display a menu that allows you to open the User Manual as PDF files or access the online version.
- Configuration Manual: Click this button to display a menu that allows you to open the Configuration Manual as PDF files or access the online version.
- Docusnap Forum: Via this button Docusnap Forum can be opened.



Buttons

- Management: Click the *Docusnap Management* button to open the *Docusnap Management*.
- Quick Support: Click the *Quick Support* button to start the "Team Viewer" Client.
- Update: Click the *Update* button to start the program update. More information about this can be found in the Update chapter.
- Hide Teaser Area: Hide and show the Teaser Area of the main window here.
- Close: Click the *Close* button to close Docusnap.

2.6.1.2 Inventory

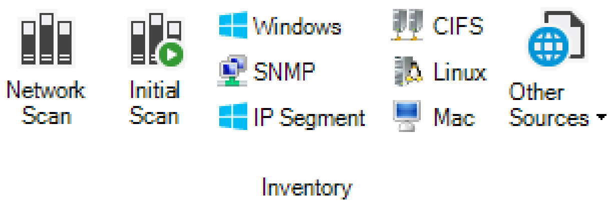
The wizards for starting the inventory process can be accessed from the *Inventory* ribbon. Learn how to use the wizards for the inventory process by reading the Inventory chapter.

Inventory

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

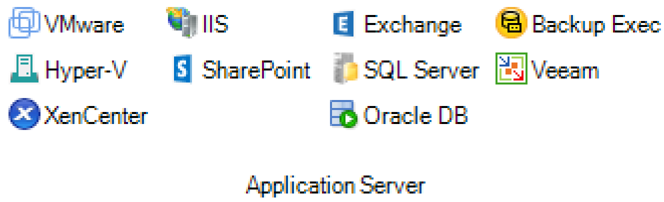
The *Initial Scan* collects basic information about the network such as Active Directory, Windows Systems, DHCP, DNS, Exchange, and SNMP using a wizard.

Depending on the type of system you want to scan, click the associated button in this group. The systems that can be inventoried here are: Windows, SNMP, IP Segments, Linux and Mac. 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 *Other Sources* button to import script files. The button DocusnapScript.exe opens the folder which contains the executable file for creating the script files. More information about Docusnap scripts can be found in the Scripts chapter.



Application Servers

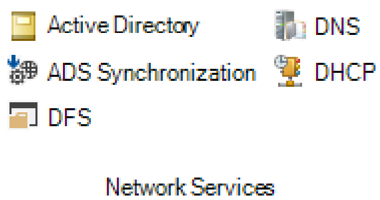
By clicking the buttons from the *Application Server* group, wizards for scanning the *VMware Infrastructure, Hyper-V, XenCenter, IIS, SharePoint, Backup Exec, Exchange, SQL Server, Oracle* and *Veeam* can be launched.



Network Services

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

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

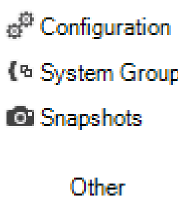


Other

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

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

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.



2.6.1.3 Documents

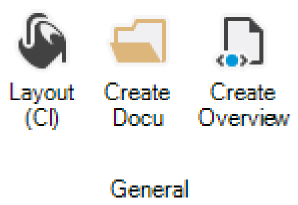
Using this ribbon, you can create the required documentation. Documents you can create include, for example, Visio maps, Excel overviews or Word-based datasheets. Learn how to use the wizard for creating the documents by reading the Documentation chapter.

General

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

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

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

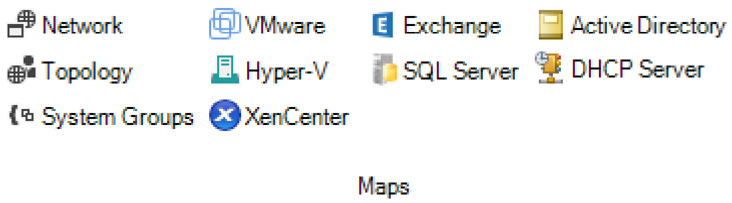


Maps

The following Visio map files can be created:

- Network Maps
- Topology
- System Groups
  Different systems located in one domain can be combined into System Groups. Corresponding datasheets and network maps, as well as routing maps, can be created for these system groups.
- VMware Infrastructure
- Hyper-V
- XenCenter
- Exchange
- SQL Server

- Active Directory
- DHCP Server

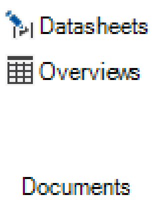


Documents

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

Click the *Datasheets* button to open the dialog for generating datasheets.

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

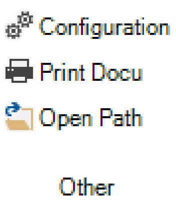


Other

Settings for the documentation path, fonts, and other default settings for the document creation can be made in the Configuration - Documentation dialog.

By clicking the *Print Docu* button, you can open the *Print Documentation* wizard.

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



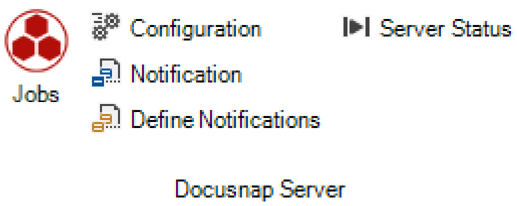
2.6.1.4 Scheduling

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

Docusnap Server

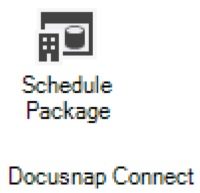
- Jobs: Clicking the *Jobs* button opens a dialog where you can manage jobs scheduled in Docusnap.

- Configuration: Click the *Configuration* button to launch the Docusnap Server configuration wizard.
- Notification: Notifications are used to send e-mail messages automatically if certain conditions or criteria are met. This feature can be used, for example, to notify the user about the expiration of a contract.
- Define Notification: With this feature, you can have Docusnap automatically send an e-Mail when a license becomes invalid or an agreement expires on that day. Corresponding queries can be defined in the *Define Notifications* dialog.
- Server Status: In the Server Status dialog the current database of the Docusnap server and the status of the server is specified. The server may also be started or stopped.



Docusnap Connect

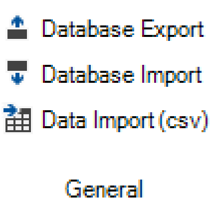
- Schedule Package: Click the *Schedule Package* button to open the *Docusnap Connect* wizard. This wizard can be used to schedule a timed export of data.



2.6.1.5 Data

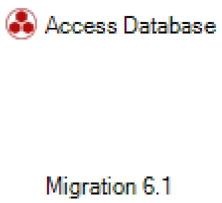
General

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



Migration 6.1

Since Docusnap 6.2 Microsoft Access database is no longer supported. The *Microsoft Access Migration Tool* provides the possibility to convert a Microsoft Access database of the version 6.1 into the format of SQL Server or LocalDB of the version 6.2. Click on the *Access Database* button in the ribbon *Data* to open the website for downloading the migration tool.



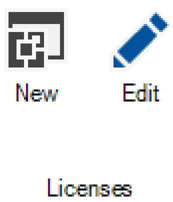
2.6.1.6 Licenses

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

Licenses

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

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



Software Product

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

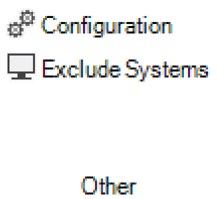
Definition

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.

Other

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

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

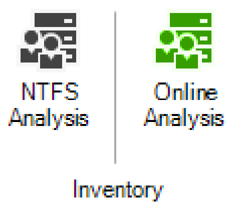


2.6.1.7 Permissions

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

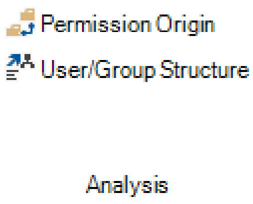
Inventory

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



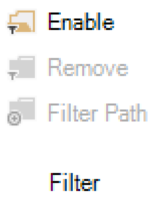
Analysis

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



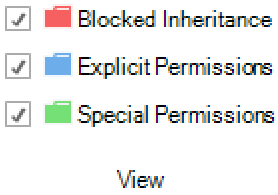
Filter

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



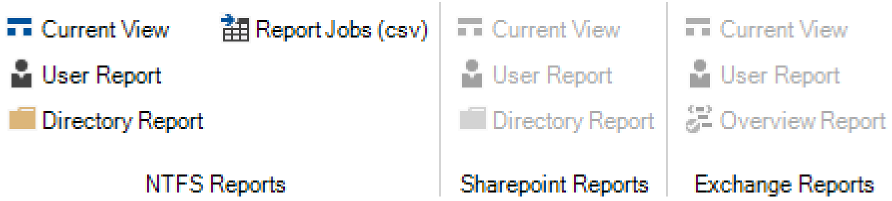
View

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



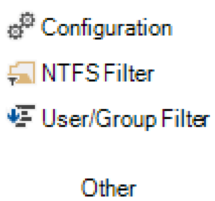
NTFS Reports / SharePoint Reports / Exchange Reports

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



Other

- The setting, if the number of inventoried levels for the NTFS analysis should be limited, is set in the *Configuration - Permission Analysis* dialog.
- Clicking the *NTFS Filter* option opens the *Manage NTFS Filter* dialog. In this dialog, you can specify directories to be excluded from the NTFS analysis. For an explanation of this dialog, refer to the NTFS Filter section.
- You can use the User/Group Filter to exclude selected users and groups from the directory reports.



2.6.1.8 Relations

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

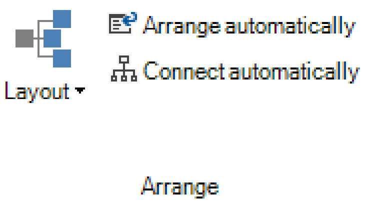
General

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

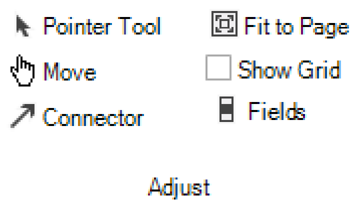
The *Arrange* group on the ribbon is used to select the algorithm for the automatic arrangement of the objects.

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



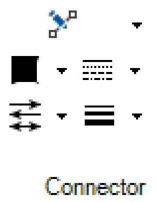
Adjust

- The *Pointer Tool* allows you to select individual components by a mouse click.
- Click the *Move* button to enable moving of the entire diagram.
- If the *Connector* tool has been selected, you can create a relation connector by clicking a component while holding down the mouse button. That component can then be dragged to another component and, by doing so, the two components will be connected.
- Clicking the *Fit to Page* button adjusts the diagram to the page.
- Show Grid: In the background of the drawing sheet, a grid can be displayed that helps you align the components.
- Fields: Each relation has properties, such as a name, description, priority, etc. The fields to be displayed can be selected from the *Display Fields for Relations* dialog.



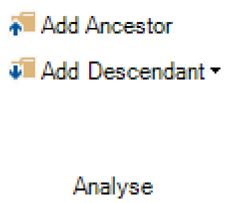
Connector

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



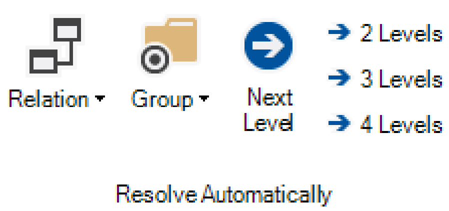
Analyse

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



Resolve Automatically

- Relation: By clicking on the *Relation* button all existing relationships for the selected object are displayed. Subsequently, the desired relation is selected and all objects of the corresponding IT Correlation are added.
- Group: By clicking on the *Group* button all existing IT Correlations groups for the selected object are displayed. Subsequently, the desired group is selected and the group with all objects of the corresponding IT Correlation are added.
- Levels: Click on the buttons *Level* to select how many levels of IT Correlations should be resolved.



2.6.1.9 Concepts

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

IT Concepts

- Edit: A click on the *Edit* button launches the Concept Editor where you can edit the selected concept.
- Refresh: Use the *Refresh* button to update the concept. This reloads the data for data elements, reports, etc. and recreates the table of contents.
- Export: 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 selected concept.
- Templates: Clicking the *Templates* button opens the *Concept Templates* dialog.
- Assign: Clicking this button opens the *Assign Concept* dialog which allows you to insert the desired concept into other tree views. It is also possible to add a *concept folder* to a node in one of the other trees.
- 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 selected document version from deletion.
- Schedule as Job: Clicking this button opens a wizard which allows you to schedule creation of a concept for a certain date and time.

2.6.1.10 Organization

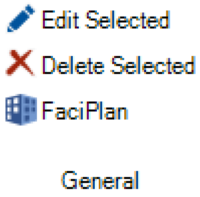
The *Organization* ribbon will display once you have selected *Organization* from the Navigation pane. Organization provides the ability to view all extensions (contracts, financial data, etc.) in a flat structure and thus presents the information from an organizational perspective. This ribbon consists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

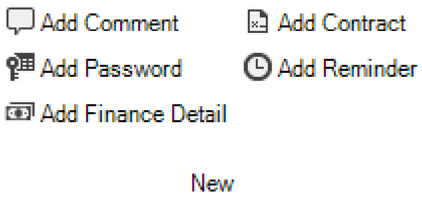
By clicking the *Delete Selected* button, you can remove the selected extension.

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.



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 Organization section.



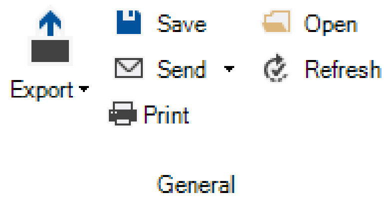
2.6.1.11 Reporting

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

General

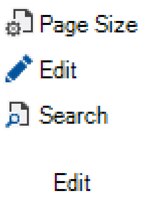
- Export: Reports may be exported to various file formats. The desired format can be selected by clicking the *Export* button. When you click the desired format, a dialog appears where you can select the pages to be exported. Click the *plus* sign to expand the settings dialog. Then, you can select format-specific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

- Refresh: By clicking on the *Refresh* button, the report is generated again. For reports with a preceding form the settings can be specified again.



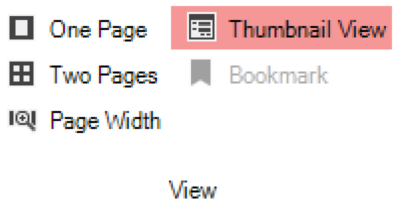
Edit

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



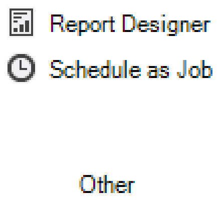
View

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



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.



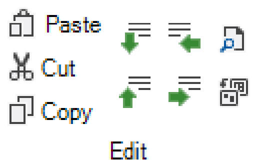
2.6.1.12 Concept Editor

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 concept. You can specify whether you would like to refresh the entire concept or just the document outline. A refresh of the entire document reloads the data for data elements, reports, etc. and recreates the table of contents. When you just refresh the document outline, the system recreates the table of contents and reloads the entries in the navigation pane.
- Export: Using the *Export* button, you can export your concept to Word, PDF, or other formats.
- Print: By clicking the *Print* button, you can print the open concept.
- Draft View: By enabling the draft view elements such as reports, plans, relationships, etc. are not completely displayed, only a placeholder is shown at the location at which they were inserted. Thereby the concept has not as many pages and is easier to process.

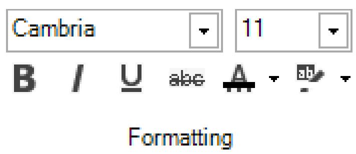
Edit

- Paste: Using the *Paste* button, you can insert elements from the clipboard into the text area.
- Cut: This button allows you to cut selected text elements.
- Copy: This button allows you to copy selected text elements to the clipboard.
- Hierarchical structure: By clicking the arrows, you can change the hierarchical level and order of the headings in your concept.
- Find: The button allows you to find particular parts in the entire text quickly and easily.
- Replace: The button allows you to find and replace certain text parts.



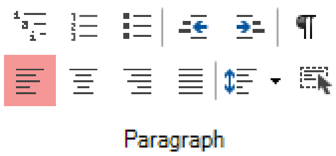
Formatting

This group contains buttons that can be used to change the font, color, and typeface of your text.



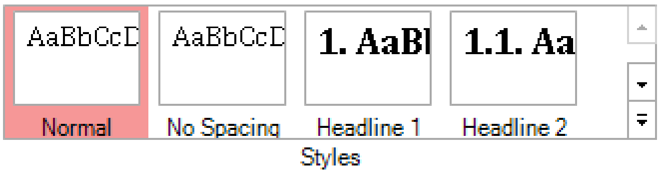
Paragraph

The buttons in the *Paragraph* group allow you to adjust the alignment and formatting of the paragraphs in your text area.



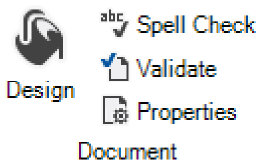
Styles

For text formatting, Styles are available which allow you to edit the text in your entire document in a centralized way. These styles are also needed when creating the table of contents.



Document

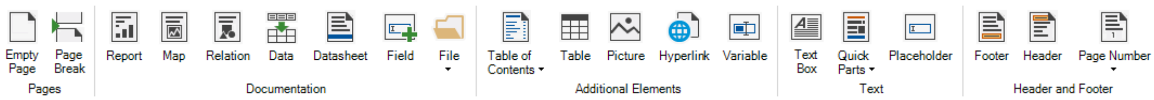
- Design: Clicking the *Design* button opens the *Designs and Styles* dialog. This dialog allows you to individually define the design of your concept.
- Spell Check: Click the *Spell Check* button to start the integrated spell checker.
- Validate: By clicking the *Validate* button, you can check the concept for validity. Any errors found will be displayed in the error list. An error is present if, e.g., an inserted 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 concept. Here, the title and author of the concepts may be changed. You can also enter an additional description. The properties also include additional information such as the date when the concept was last modified.



Insert

Use the Insert ribbon to insert different elements into your concept.

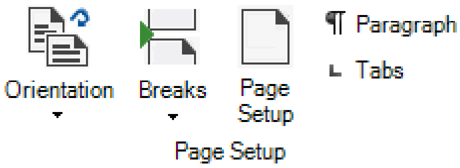
- Header and Footer: Use the Header or Footer button to open an additional tab where you can specify your header and footer settings.



Page Layout

- Orientation: The options below this button can be used to specify portrait or landscape format.
- Breaks: Click the *Breaks* button to insert a page break. Two different types of page breaks, i.e. *Continuous* and *Next Page* can be selected.

- Page Setup: Click the *Page Setup* button to adjust the margins, paper size, header and footer, columns, and borders of your document.
- Paragraph: This button opens a dialog that allows you to change the formatting, indents, frame, and page breaks of your document.
- Tabs: This button opens the *Tabs* dialog where you can set and change various indents.

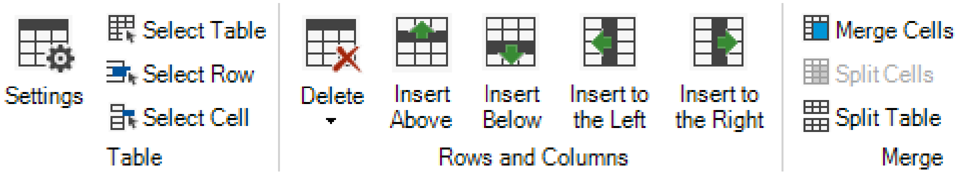


Data Elements

If you highlight a certain element such as a map, a 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.
- Draft View: By enabling the draft view the selected element is not completely displayed, only a placeholder is shown at the location at which it was inserted.

Table Tools



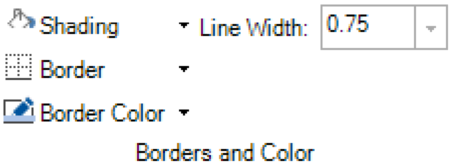
The Table Tools ribbon display when you insert a new table or select an existing table.

Table Styles

Various styles are available for tables. Click the little arrows next to the buttons and select the desired basic shading for your table.

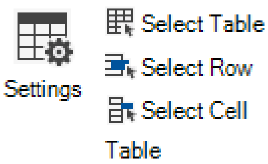
Borders and Color

In the *Borders and Color* group, you can select the shading, border color, border, and line width for the selected part of the table.



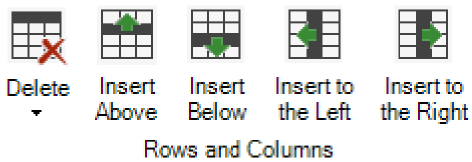
Table

- Settings: Here, you can change table properties such as the distance from text or the cell height.
- Select Table: Click the *Select Table* button to select the entire table.
- Select Row; Select Cell: These two buttons can be used to select the row or cell where the cursor is currently placed.



Rows and Columns

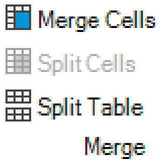
- Delete Table; Delete Columns; Delete Rows: These options can be used to delete the entire table, selected columns, or selected rows. These options display when you click the *Delete* button.
- Insert Above; Insert Below; Insert to the Left; Insert to the Right: These four buttons can be used to insert more columns and lines into an existing table.



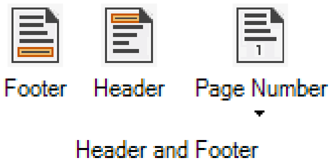
Merge

- Merge Cells: Click this button to merge the selected cells into one.
- Split Cells: Clicking this button allows you to split the highlighted merged cell again.

- Split Table: Click this button to split the existing table into two.



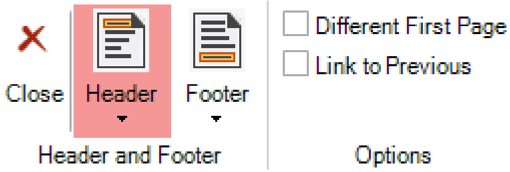
Header and Footer



This ribbon allows you to create headers and footers.

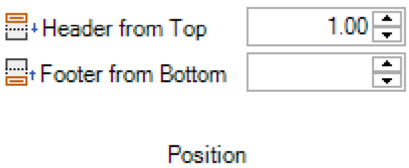
Header and Footer

- Close: Click this button to end the editing of your headers and footers. You are taken back to the *General* ribbon.
- Header; Footer: Use these buttons to enable, disable and modify your headers and footers.
- Different First Page: Tick this checkbox to create a special header and footer for the first page of your document.
- Link to Previous: If you enable the *Link to Previous* feature, a document with multiple sections will always use the header and / or footer of the previous section.



Position

In the *Position* group, you can change the position of your headers and / or footers.



2.6.2 Data Explorer

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

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

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

By clicking the button above the Data Explorer tree structure, you can start a Full-text Search.

Once a node has been selected in the Data Explorer, you can click the button to start a Data comparison.

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

Inventory Documents Licenses Permissions Relations Concepts Organization

Inventory

Documents

Licenses

Permissions

Relations

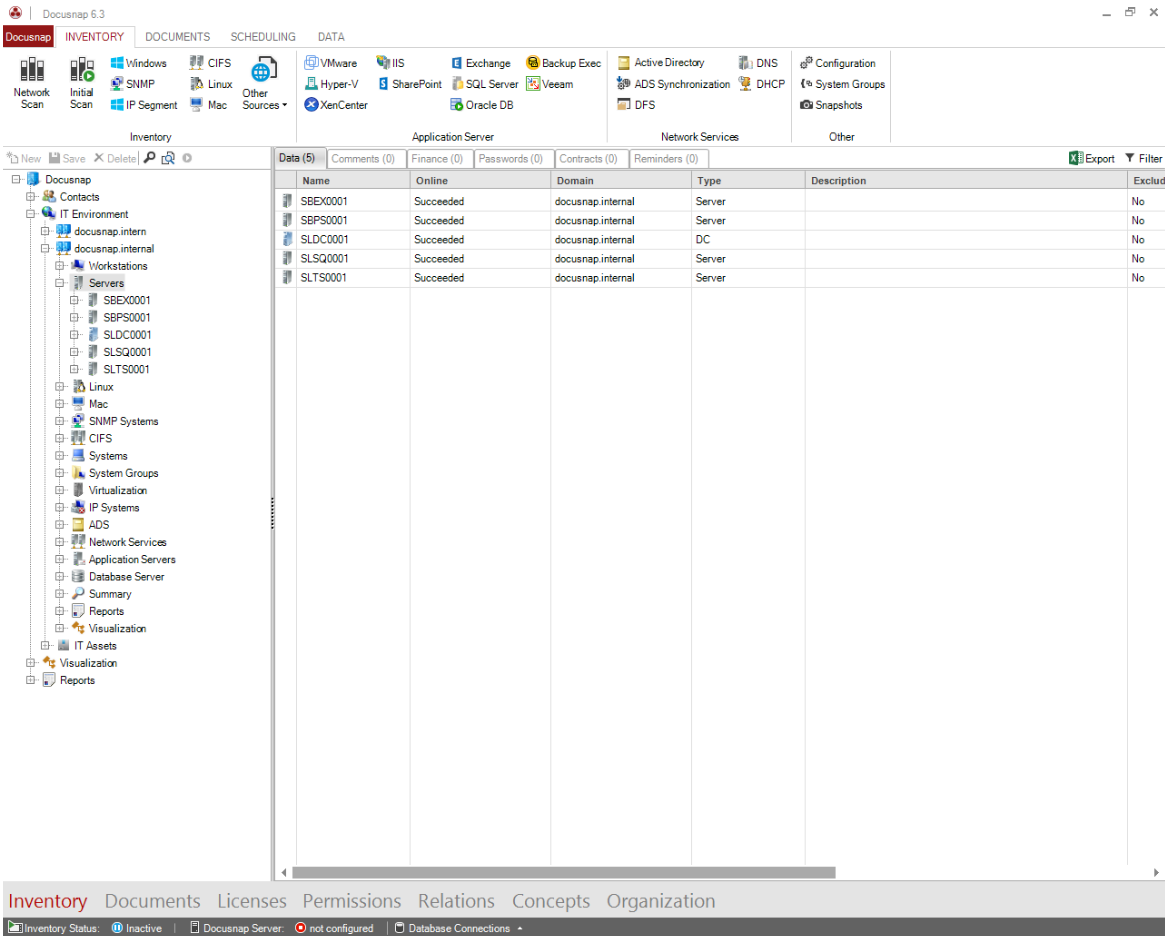
Concepts

Organization

2.6.2.1 Inventory

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

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



At the second level, the *Contacts* and *Network Environment* objects are located.

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.

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, DNS Servers and DFS roots. Under the Application Servers node, the Exchange, IIS Servers, SharePoint Servers, Backup Exec and Veeam nodes are listed. Below the caption Database Servers are the SQL servers and the data from the Oracle inventory. 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, the Hyper-V Server and the Xen 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 data entry screen 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.

2.6.2.2 Documents

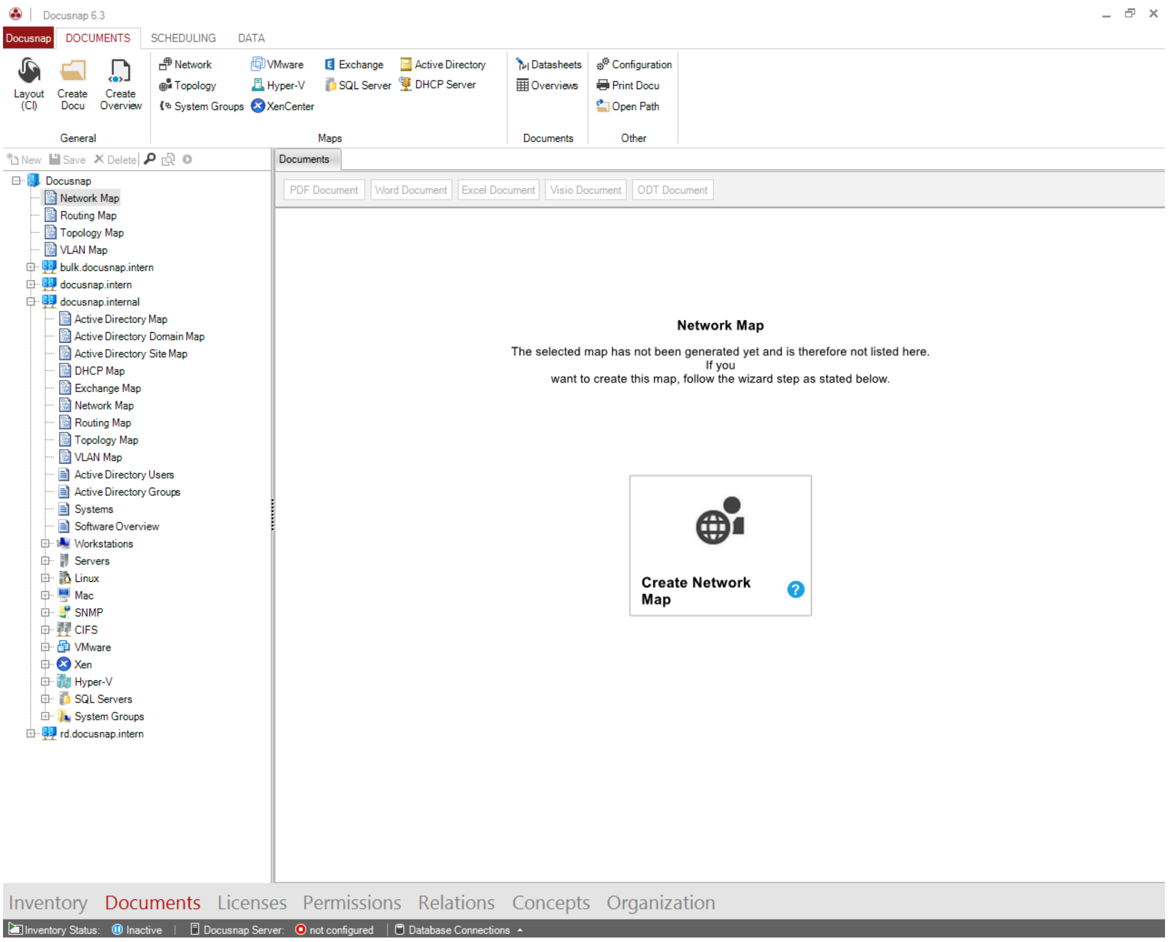
When you navigate to Documents in the Navigation pane, the Explorer shows any documents created in this module. Maps and datasheets are displayed in a hierarchical structure.

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.

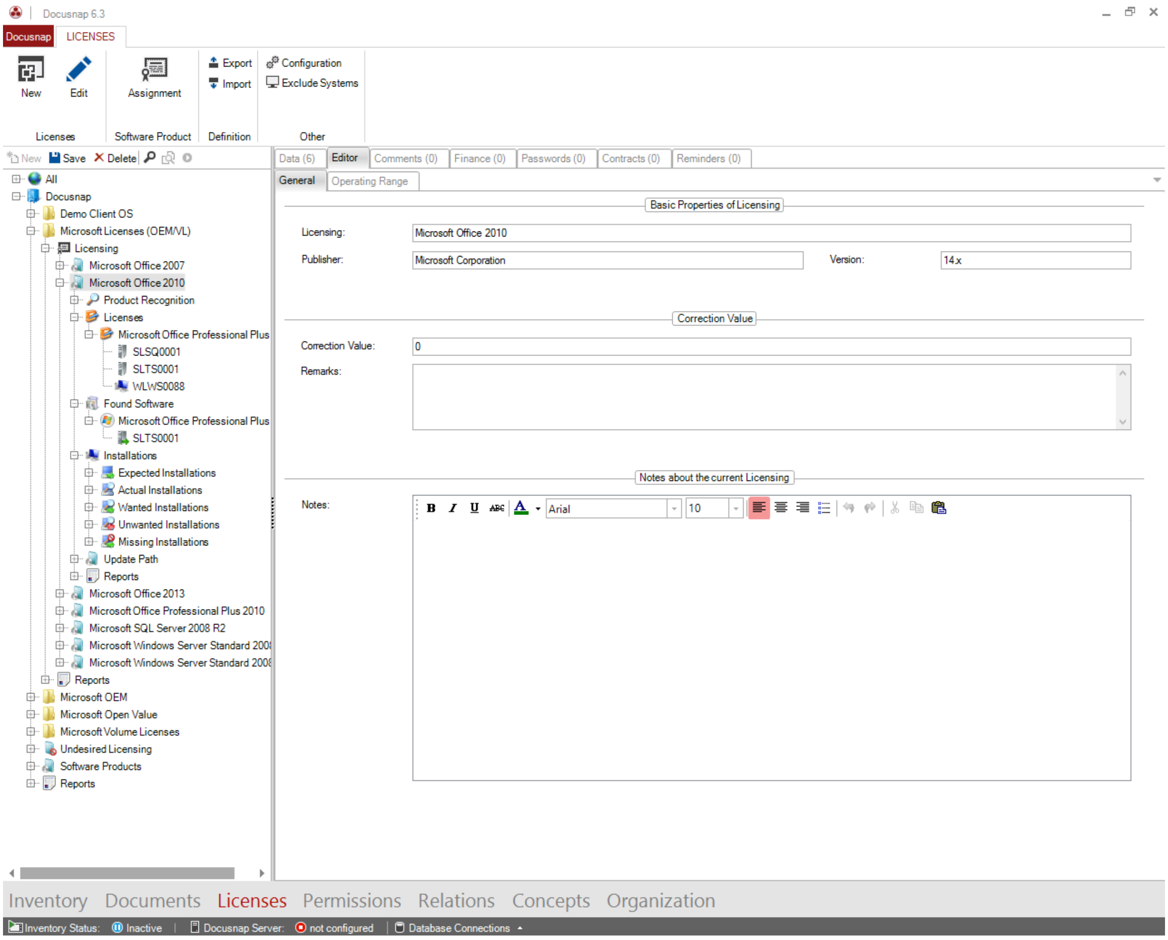
Datasheets can be found below the Workstations, Servers, Linux and Mac nodes. Below the VMware and Hyper-V nodes, you can find the associated maps.

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.



2.6.2.3 Licenses

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



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:

- Product Recognition
- Licenses
- Found Software
- Installations
  - Expected Installations

- Actual Installations
- Wanted Installations
- Unwanted Installations
- Missing Installations

- Update Path
- Reports

In the product recognition all directly assigned software products are listed.

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 or if a 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.

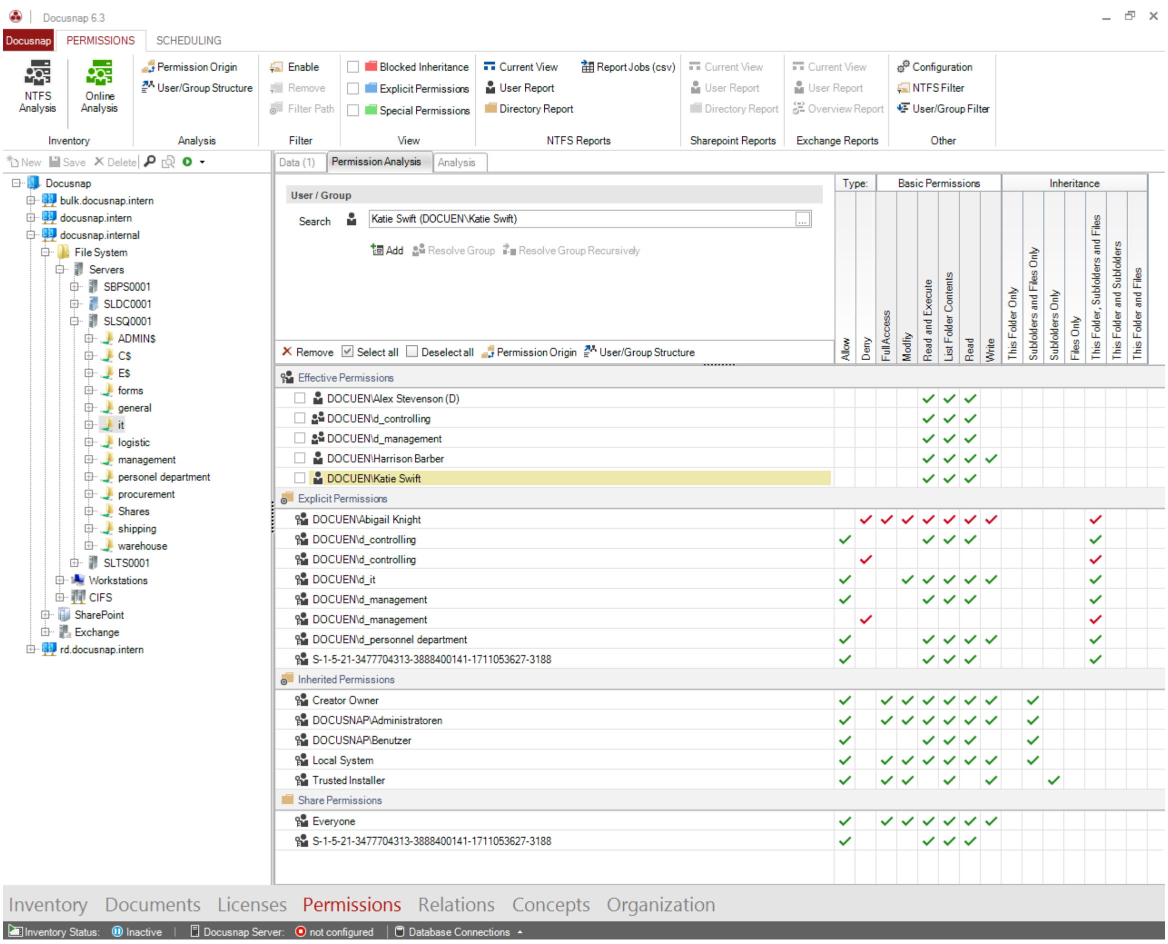
You can define a software product as "undesired". Any undesired software products are shown under the software group, just like the other software products. Additionally, these software products will also be listed under the *Undesired Products* node.

2.6.2.4 Permissions

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

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

For more information on this topic, refer to the Permission Analysis chapter.

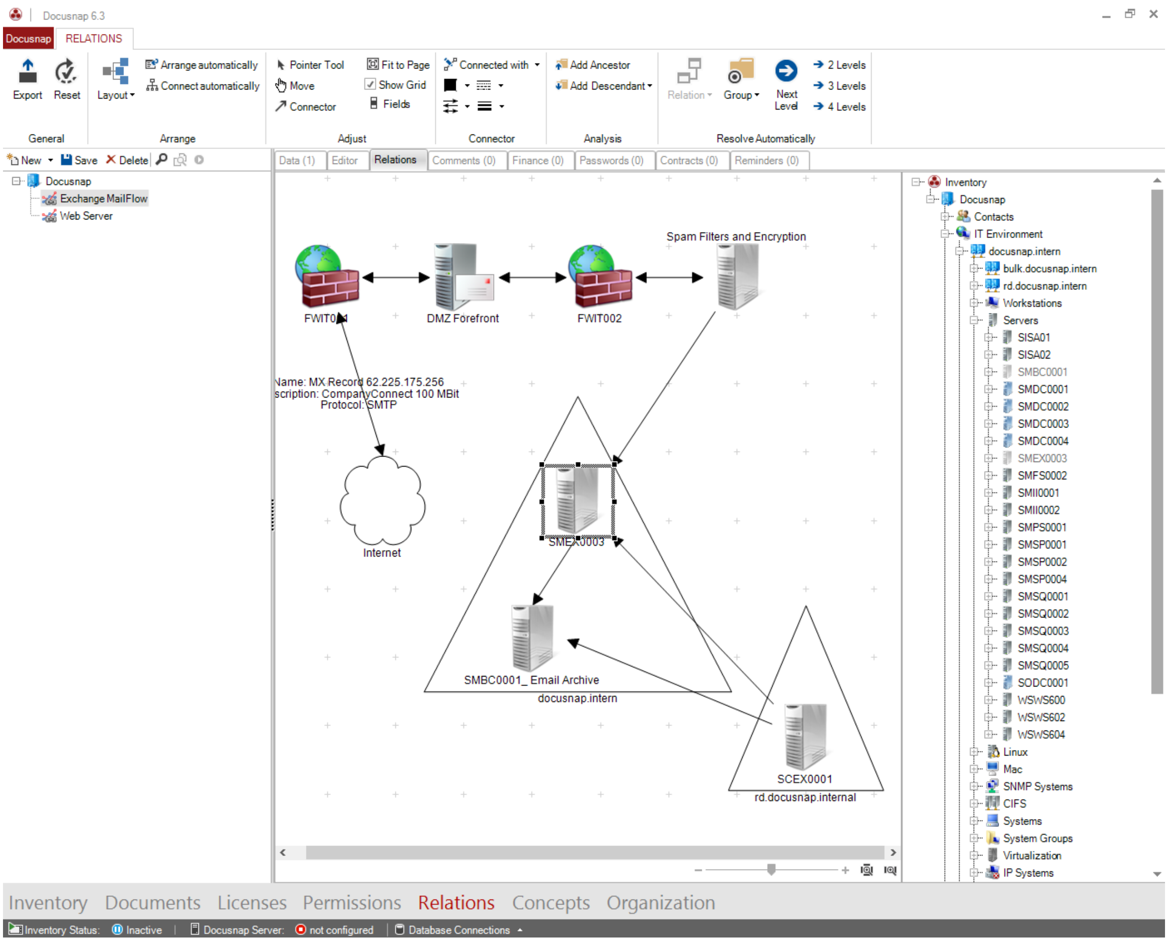


The company is shown at the top level of the tree. Below the company, you can see the associated domains which have been inventoried. Below each domain, you can find the File System, SharePoint, and Exchange nodes where the corresponding permissions are listed.

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

2.6.2.5 Relations

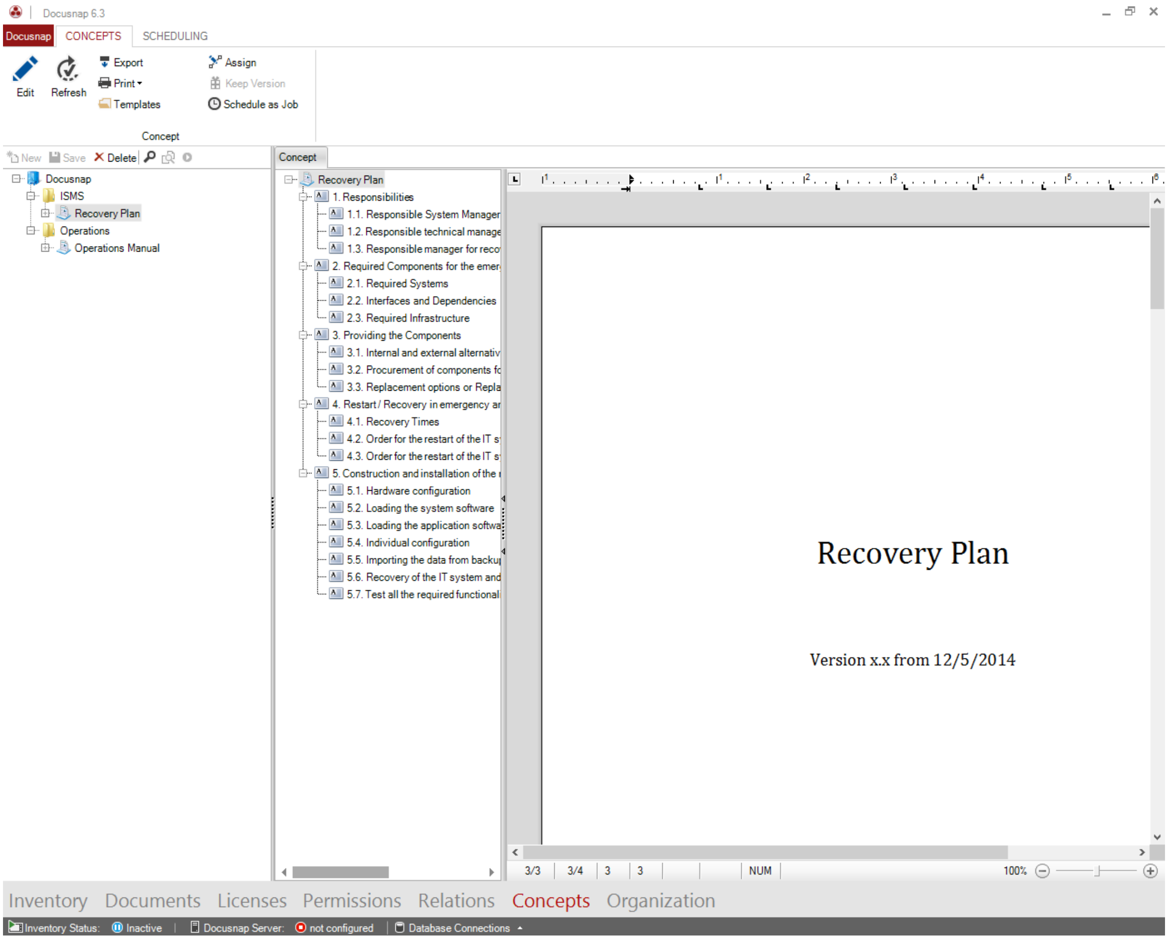
In the *Relations* module, the Explorer displays the companies at the first level. Relations will be created at the level directly below the companies. To create a new relation, click the *New* button above the tree view. You can then navigate to the *Relations* tab to create the desired diagram.



2.6.2.6 Concepts

The *Concepts* Explorer shows the available concepts. A dedicated *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.



2.6.2.7 Organization

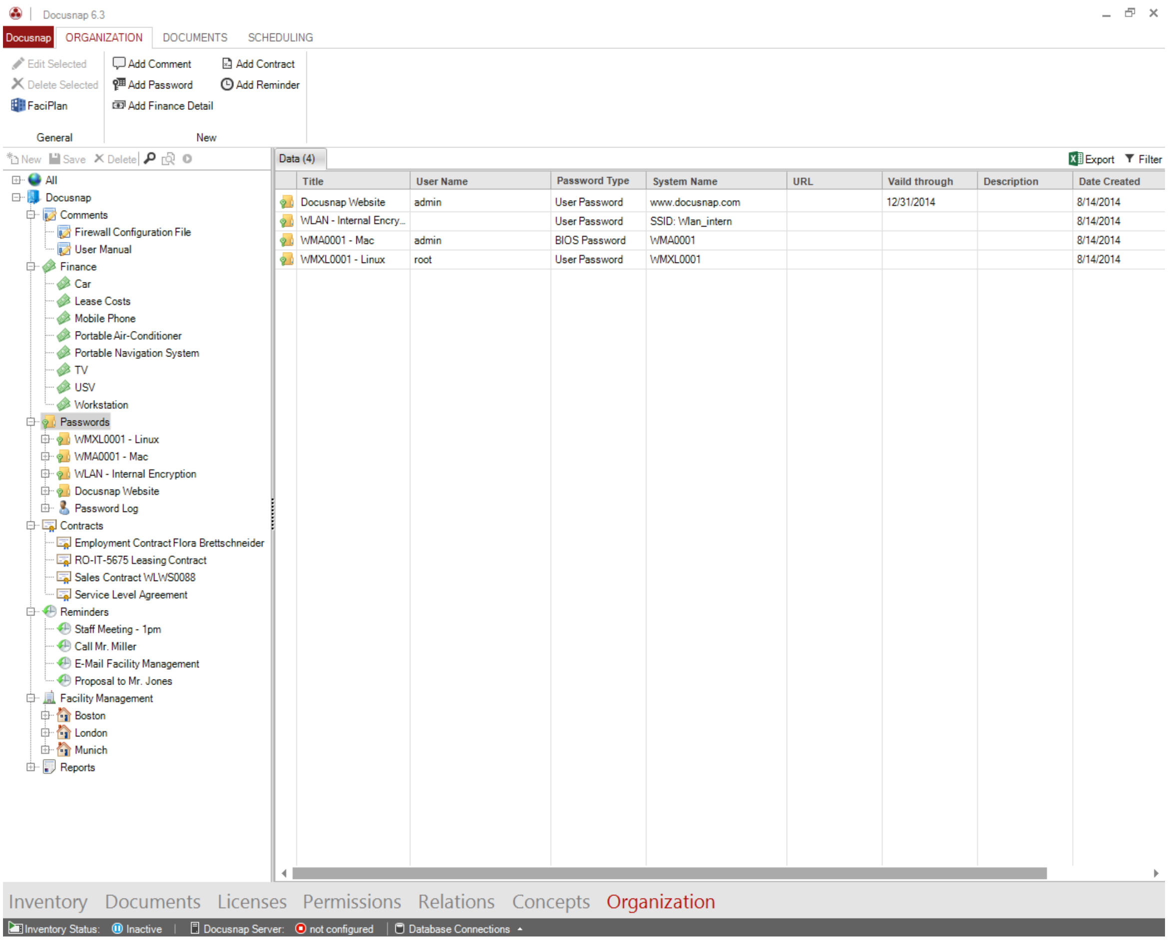
When you navigate to the *Organization* module, the Explorer displays any extensions (contracts, finance details, etc.) using a flat structure.

These extensions (comments, finance details, passwords, contracts, reminders) may be added from one of the explorers found in the Inventory, Permissions and Licenses 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.



2.6.3 Main Window

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

Information

Data

Editor

Reports

Extensions (comments, finances, passwords, contracts, reminders)

Documents

Permission Analysis

Permission Origin

Group Policies

Structure

Relations

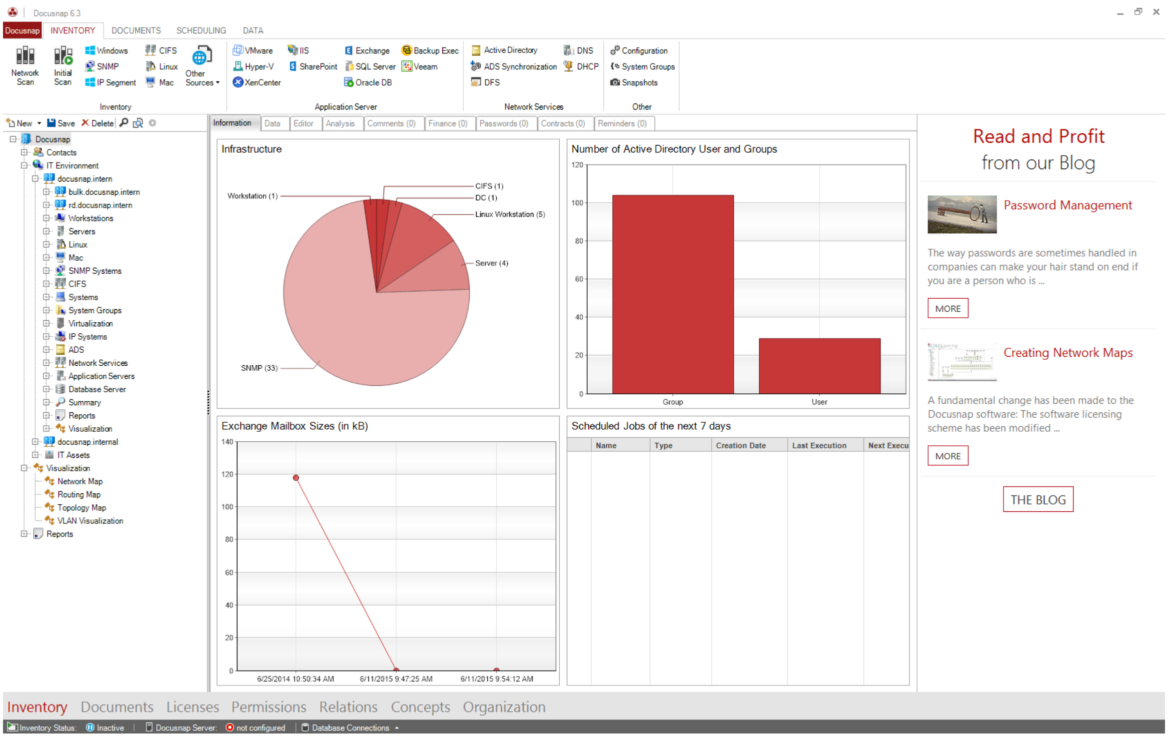
Analysis

Concepts

2.6.3.1 Information

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

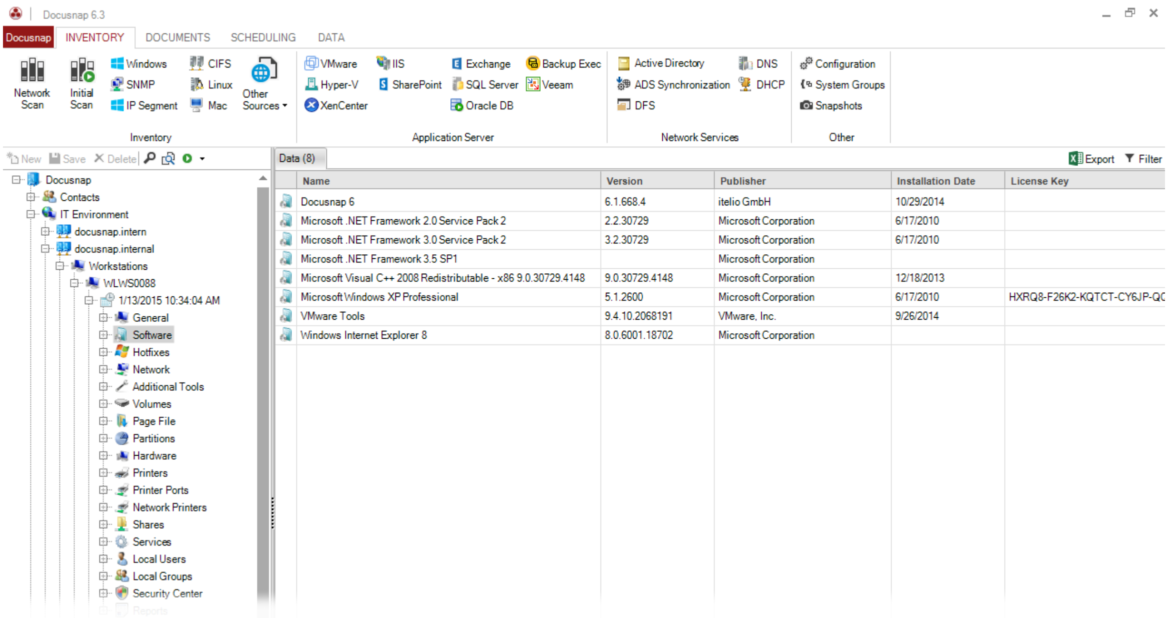
This tab contains a Dashboard with graphical overviews appears. In addition, an overview of the jobs schedule in the Docusnap Server is displayed.



2.6.3.2 Data

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

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

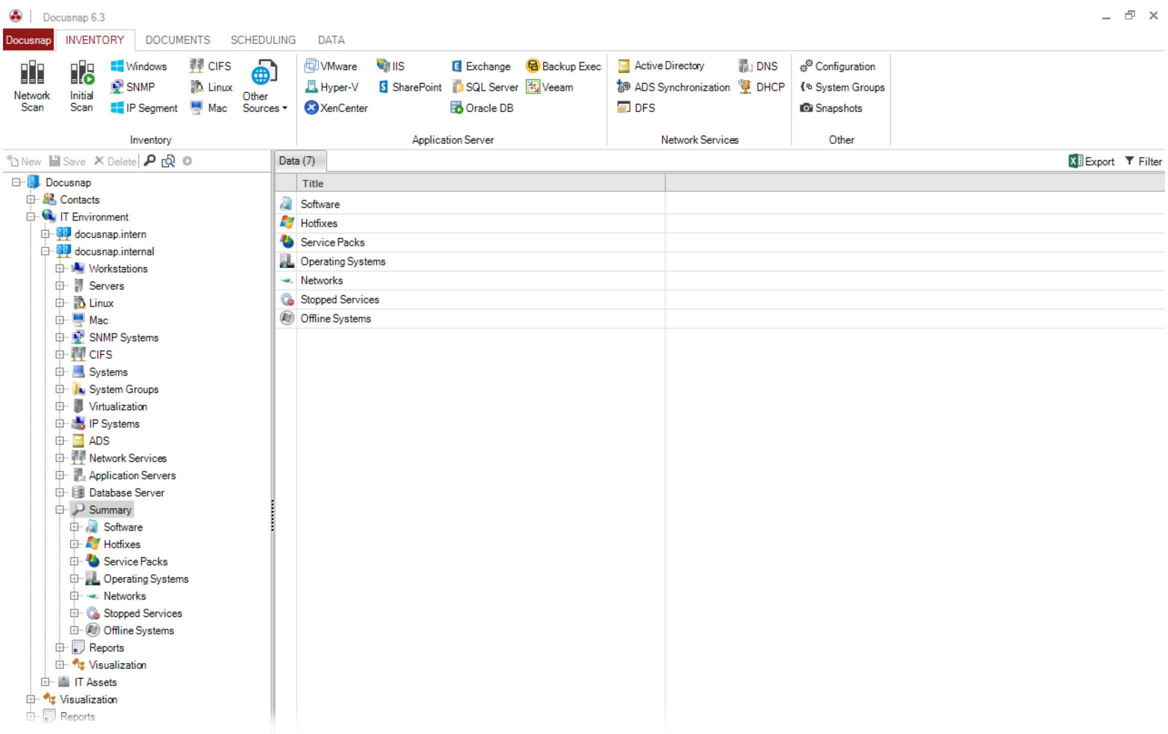


If an object you select in the Explorer contains data, the corresponding object data will be displayed on the *Data* tab.

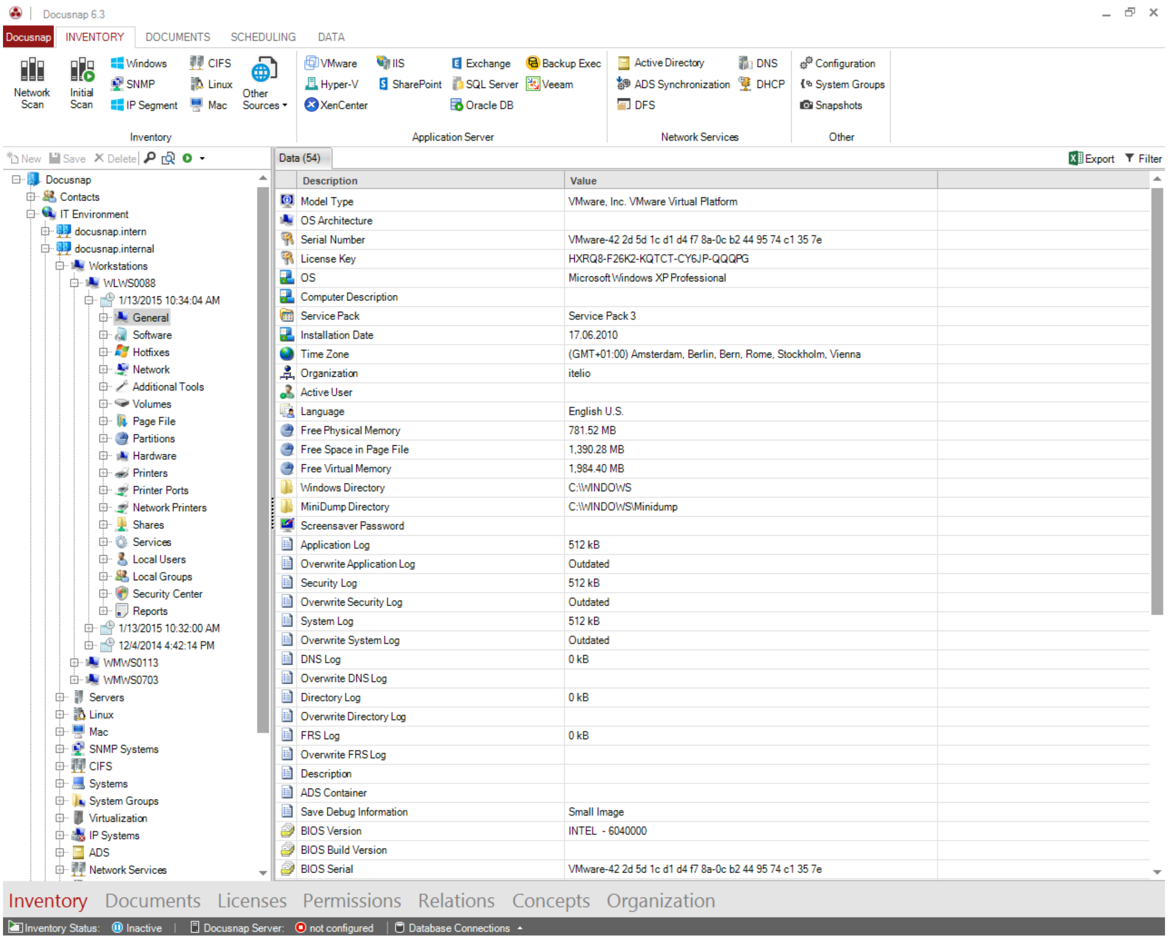
If the object selected in the Explorer has children, the content of the next level below will be shown on the *Data* tab.

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.



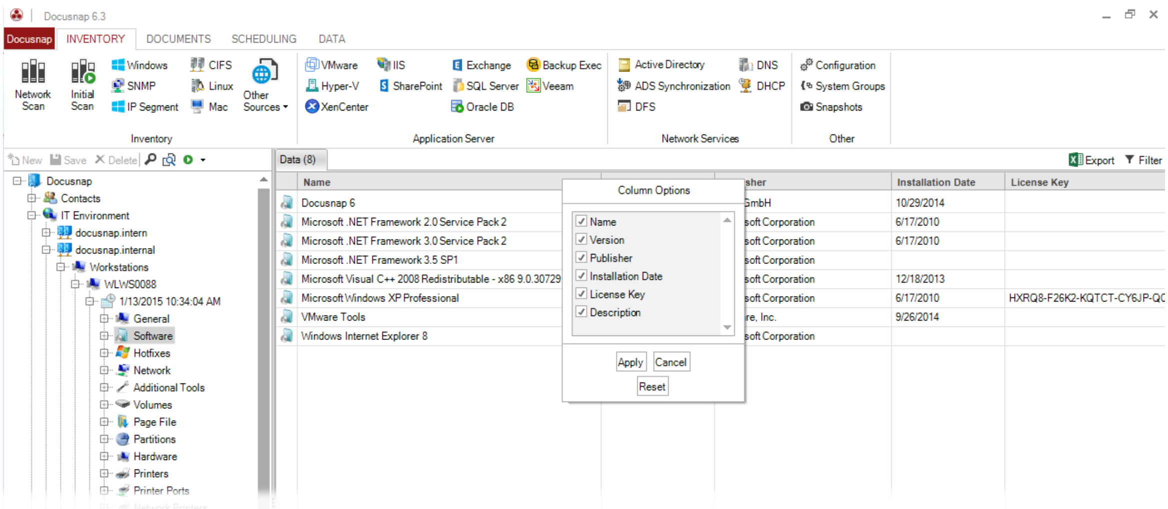
If the data of the child object can only occur once per parent object, they will be displayed in an alternative way. For example, there is only one record for *General*, i.e. general information about a Windows system. In the alternative representation, this data will not be presented as a table, but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



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

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

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



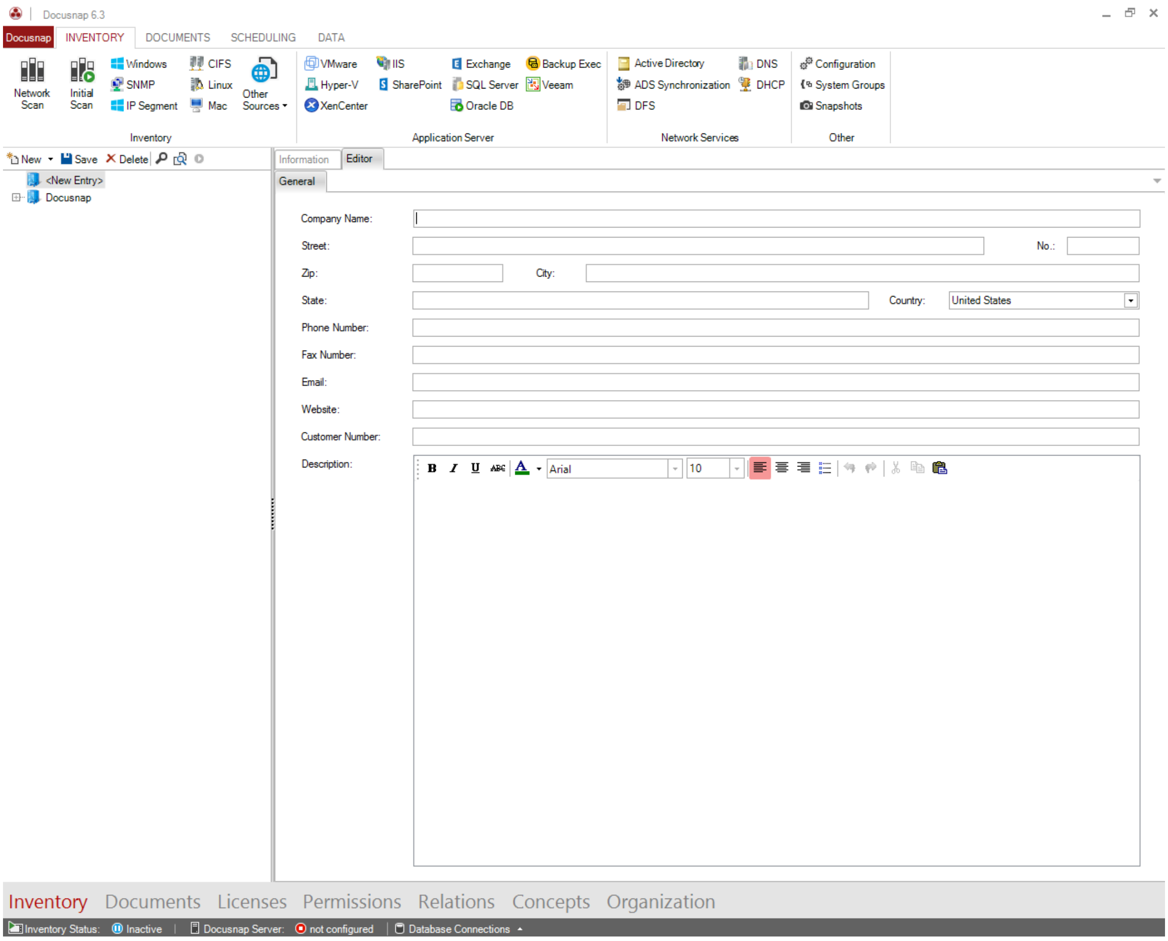
2.6.3.3 Editor

In the *Editor* tab you can enter additional information into data entry screens to add them to the database. This may include information about the company, additional systems, equipment, etc. The *Editor* tab will only be displayed if the object selected in the Explorer is *editable*. For example, if you want to create an entry manually, a blank data entry screen will open in the editor where you can enter the required information. Additional tabs, such as Data, Documents or the various tabs for the extensions will only be displayed after you have saved the data entered in the editor.

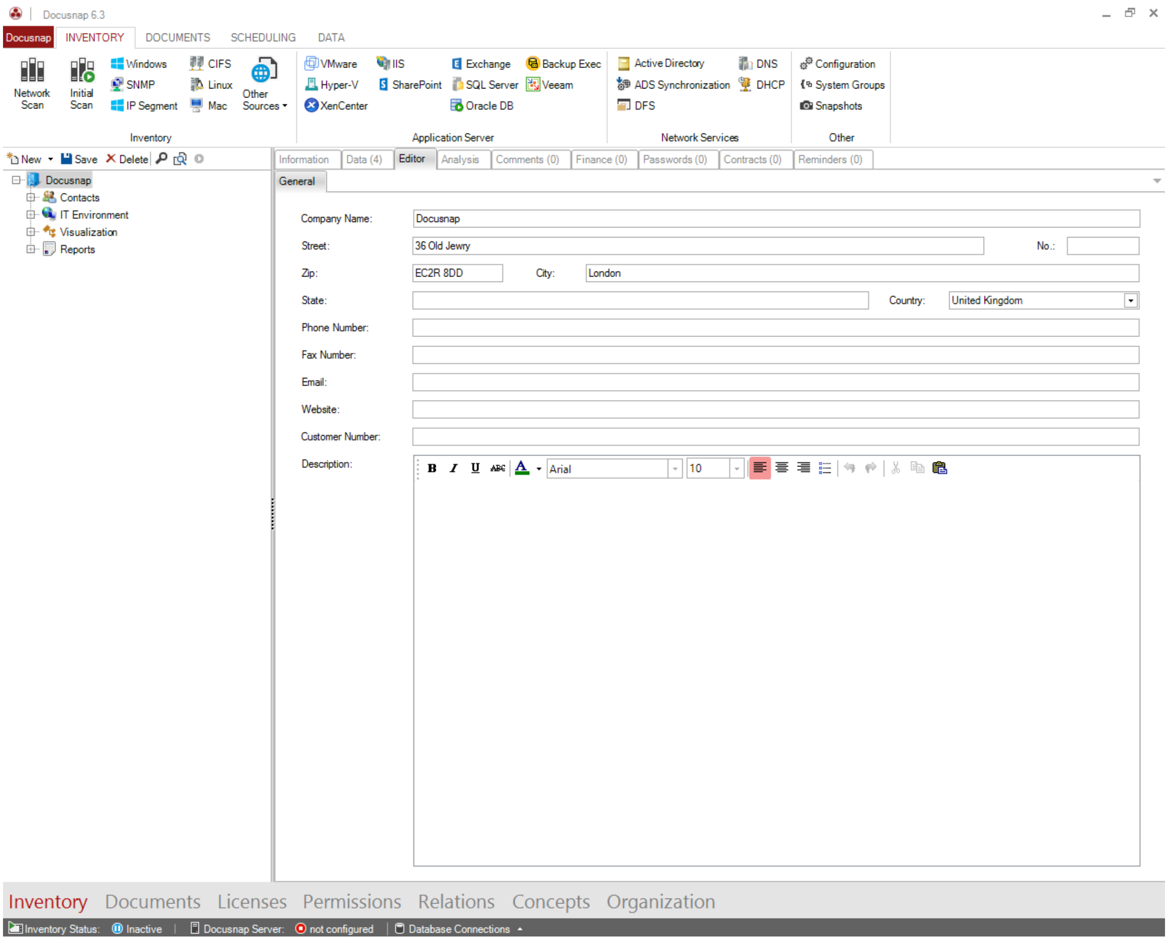
For all editable objects displayed in the tree view, data entry screens have been predefined which allow quick and easy editing of all available data directly from the Docusnap tree view. The data entry screens are part of the user interface with the database. All data you enter here, will be basically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

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

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

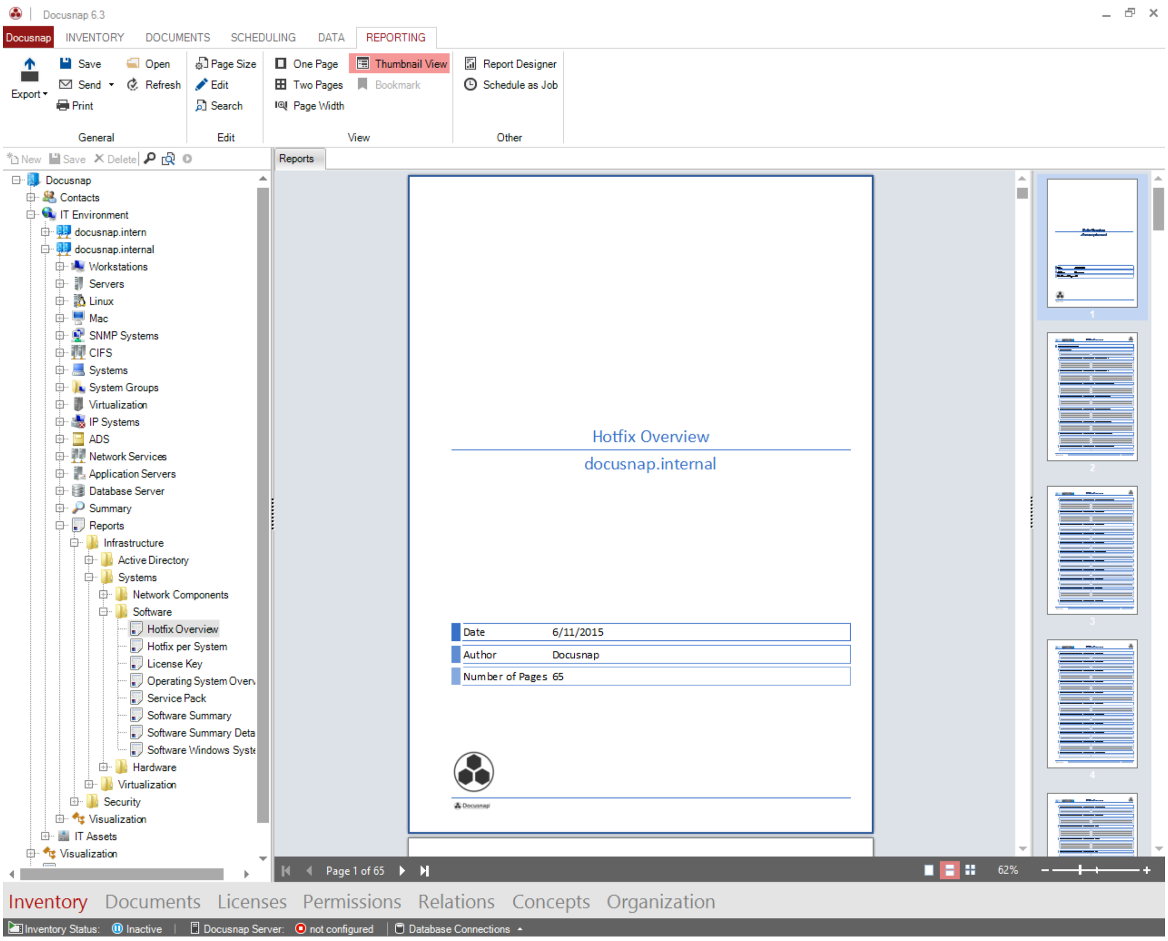


If you select an editable object that has already been saved, the associated data entry screen opens on the *Editor* tab, populated with the previously saved data.



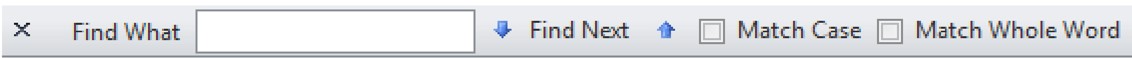
2.6.3.4 Reports

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



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

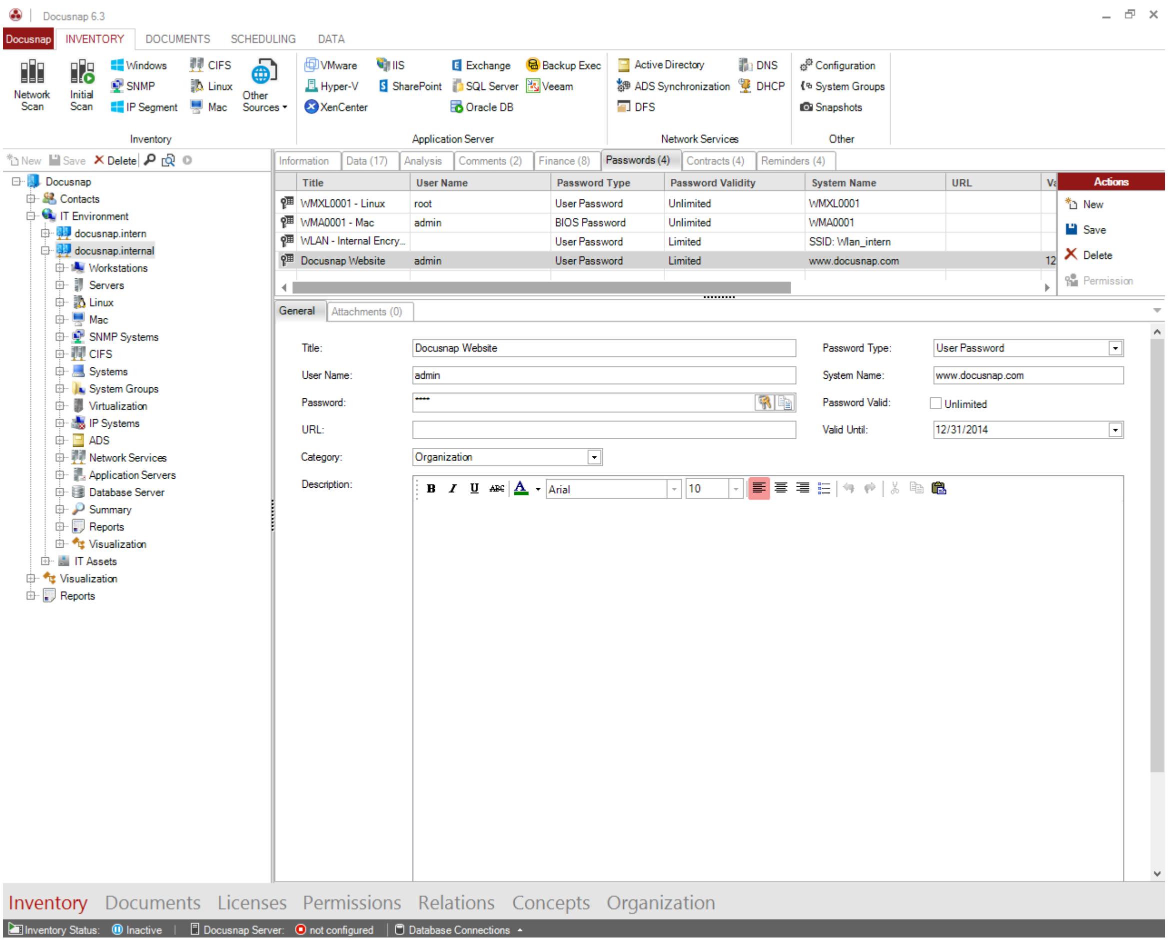
When you click the *Search* button on the *Reporting* ribbon, a search bar opens at the bottom of the main window. Here, you can enter your search criteria.



2.6.3.5 Extensions

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

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 Organization module.



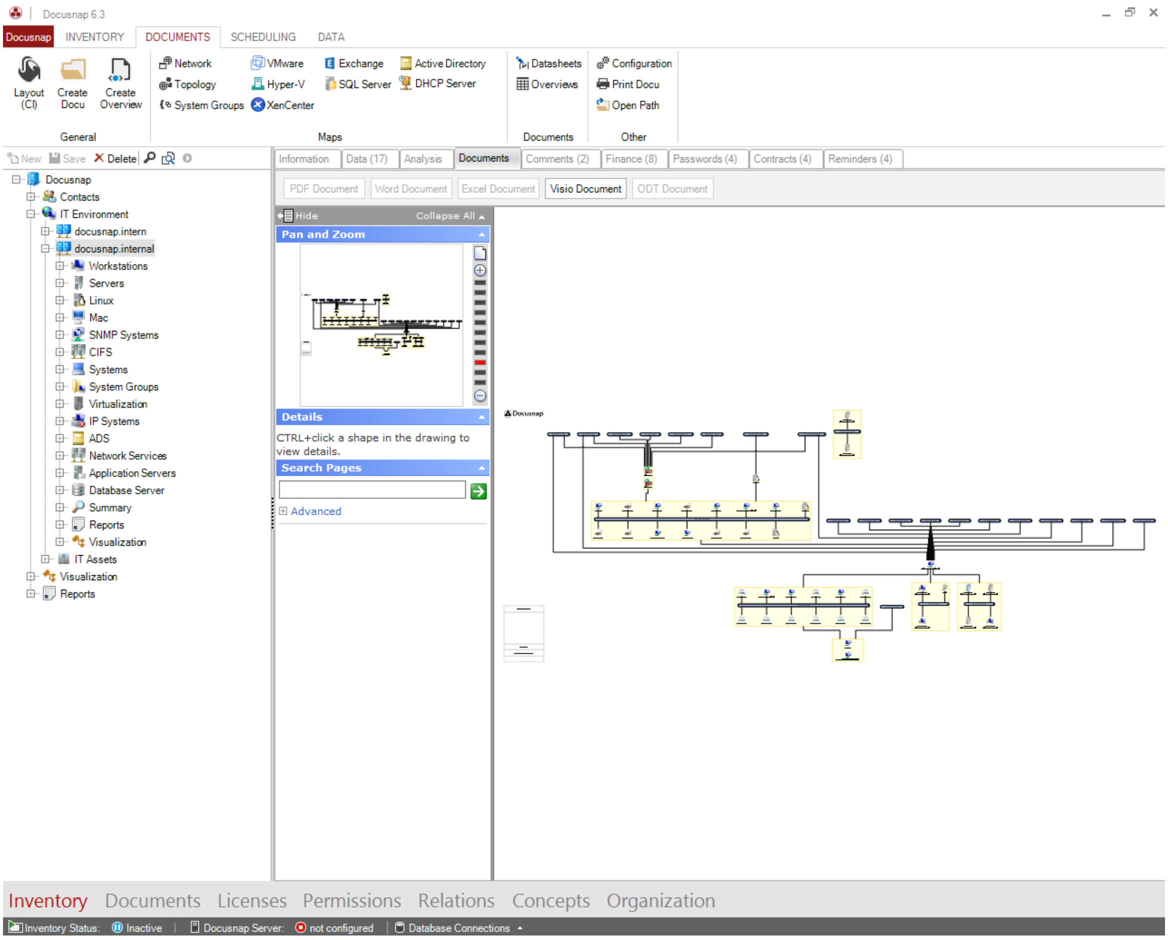
2.6.3.6 Documents

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

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

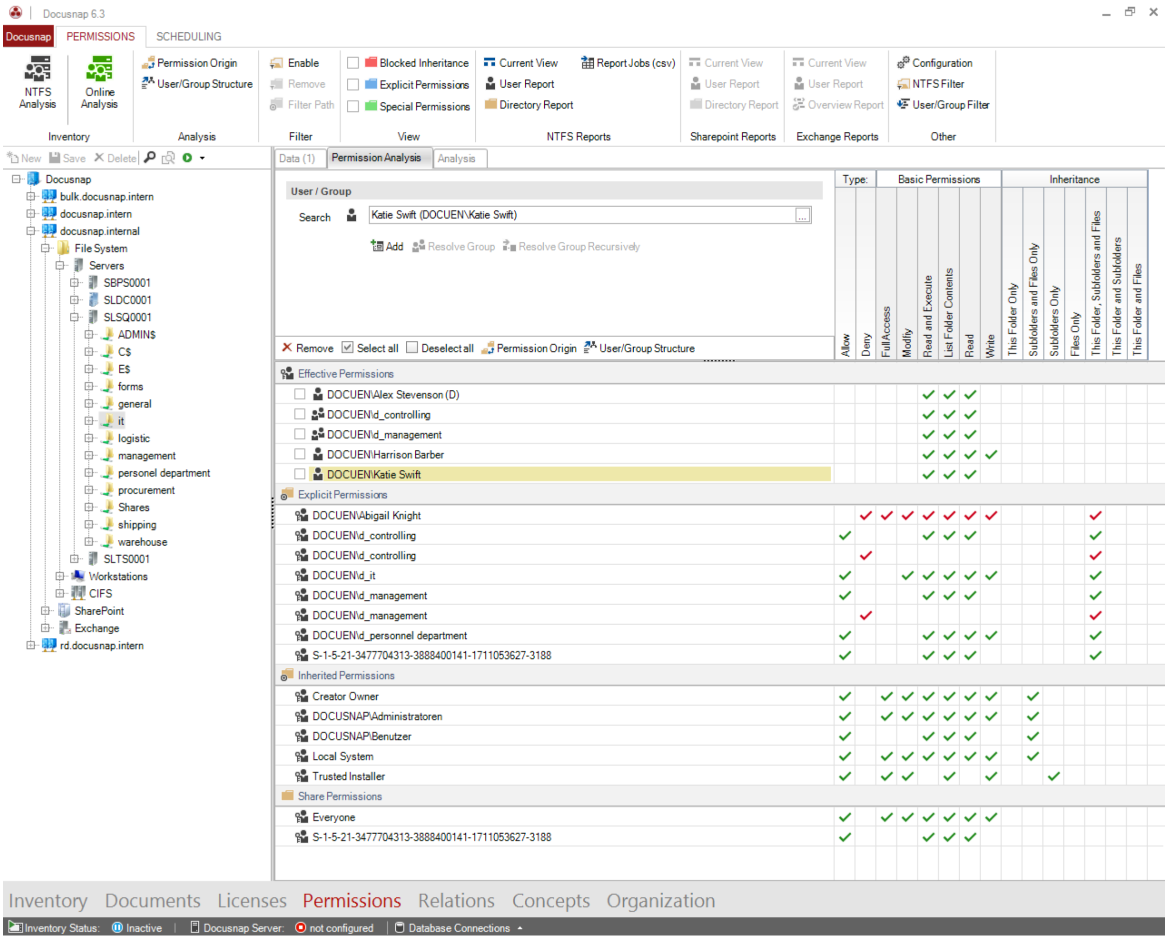
In the *Documents* tree view, the document generated by Docusnap is displayed at its proper location. If no document has been created for a node in the tree view, a Dashboard appears that helps you with the creation of the desired document. For detailed information on the Documentation module, click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

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



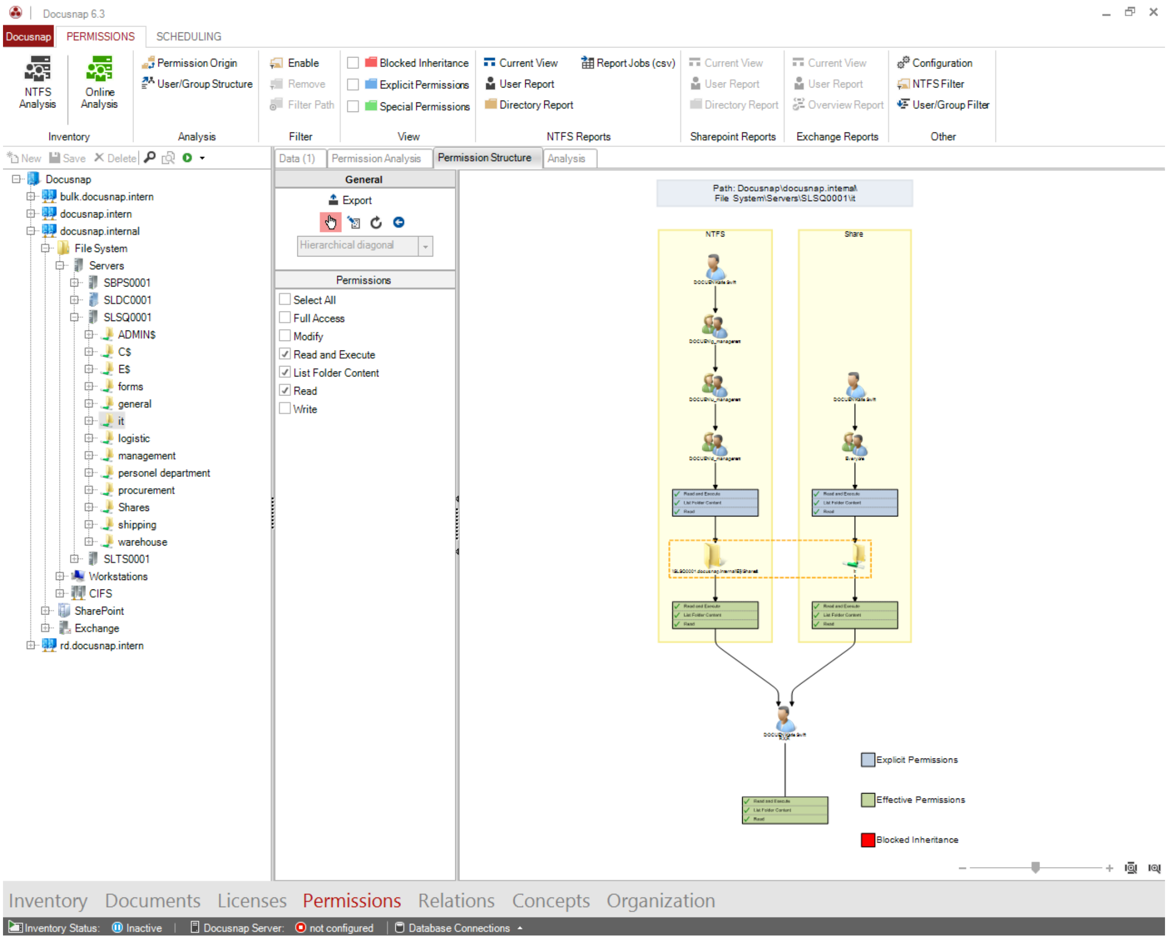
2.6.3.7 Permission Analysis

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



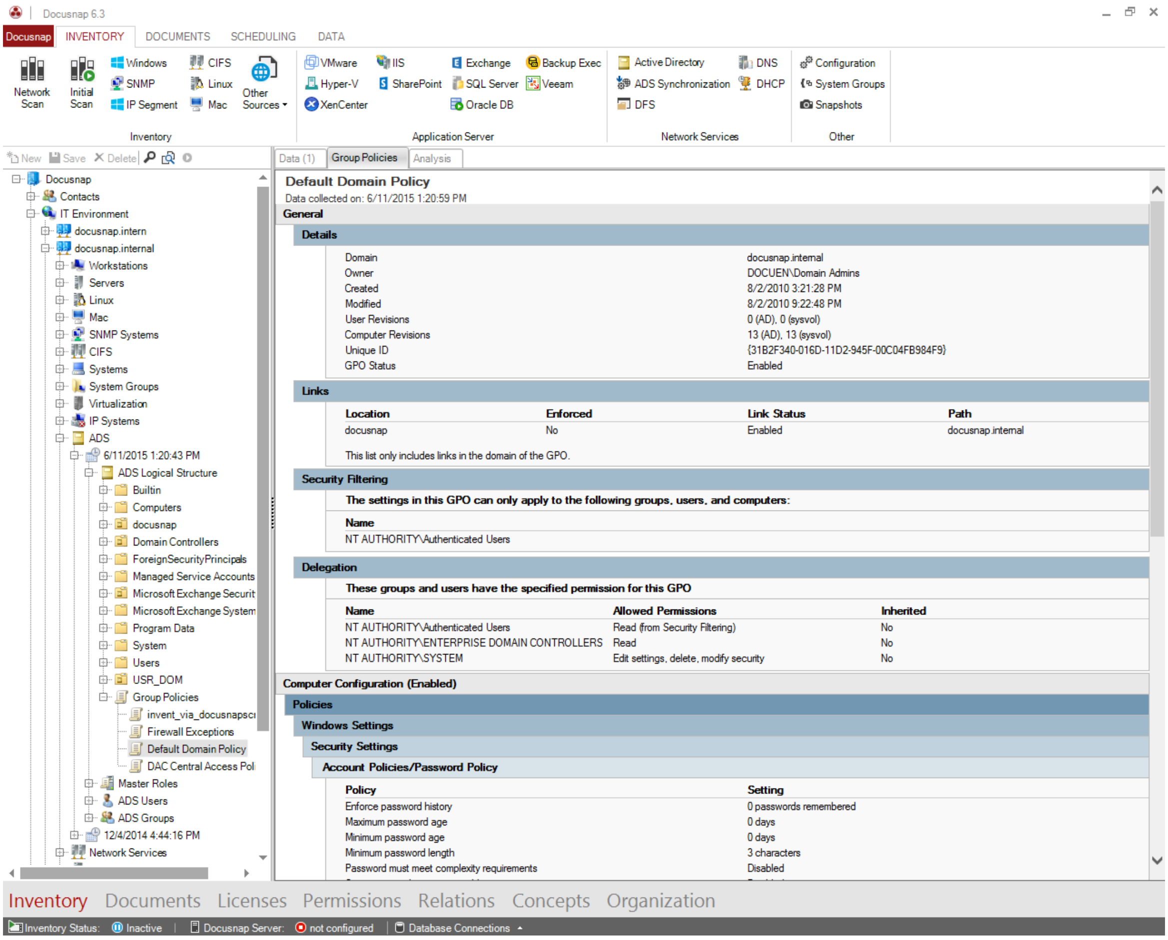
2.6.3.8 Permission Origin

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



2.6.3.9 Group Policies

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



2.6.3.10 Structure

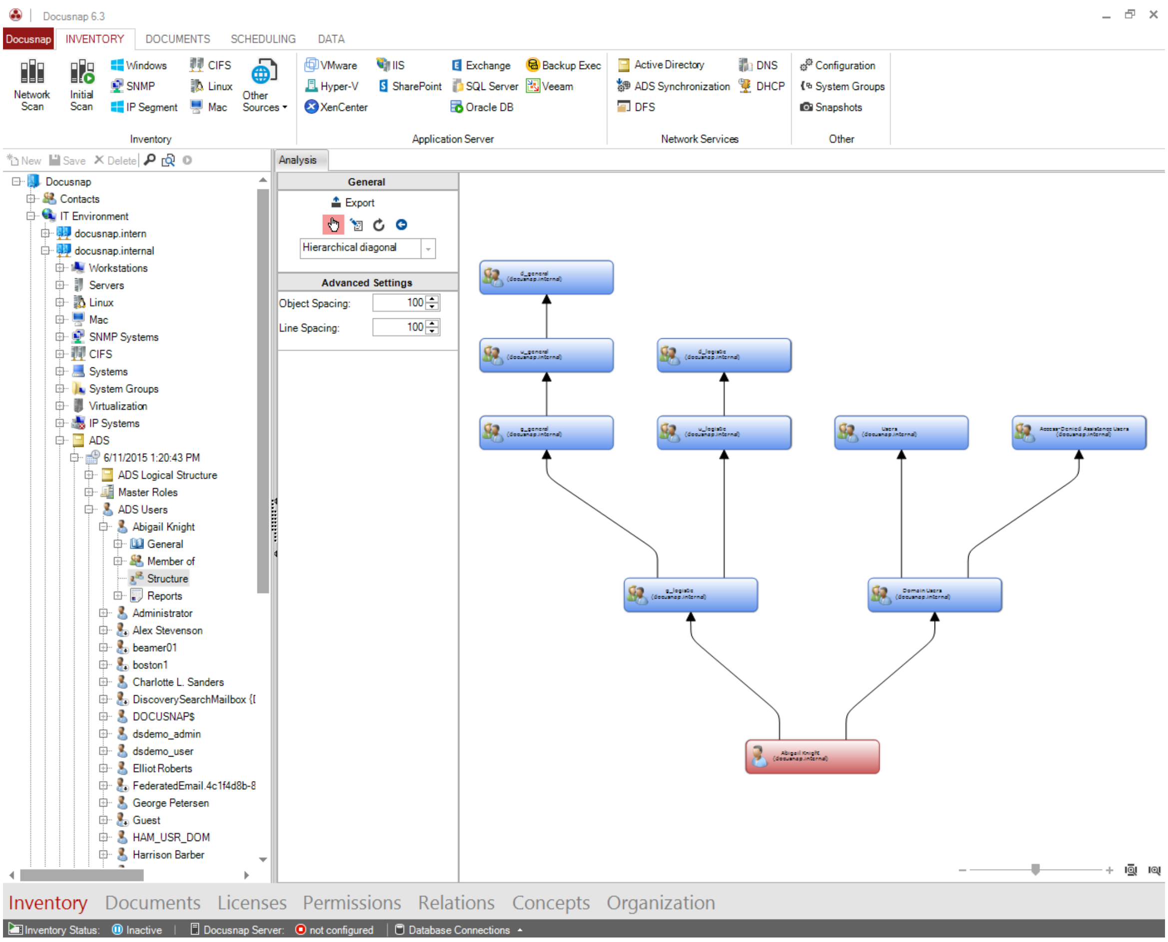
The *Analysis* tab will be displayed in the main window when you select an *Active Directory user* or an *Active Directory group*. This tab shows group nesting as well as user nesting information.

Using this information, you can find out the following:

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

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

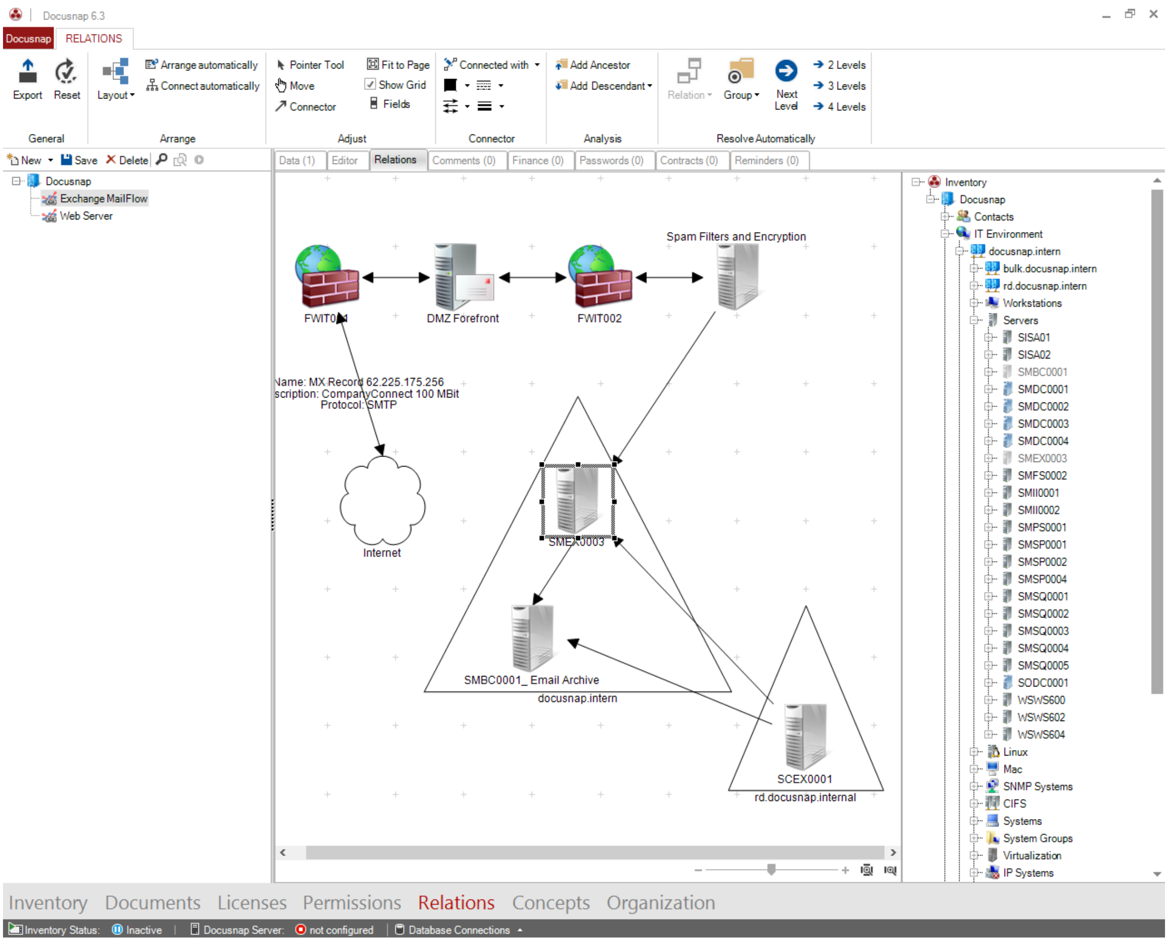
Using the icons in the left pane, you can modify the graphics display or export the displayed diagram to Microsoft Visio or to a .png file.



2.6.3.11 Relations

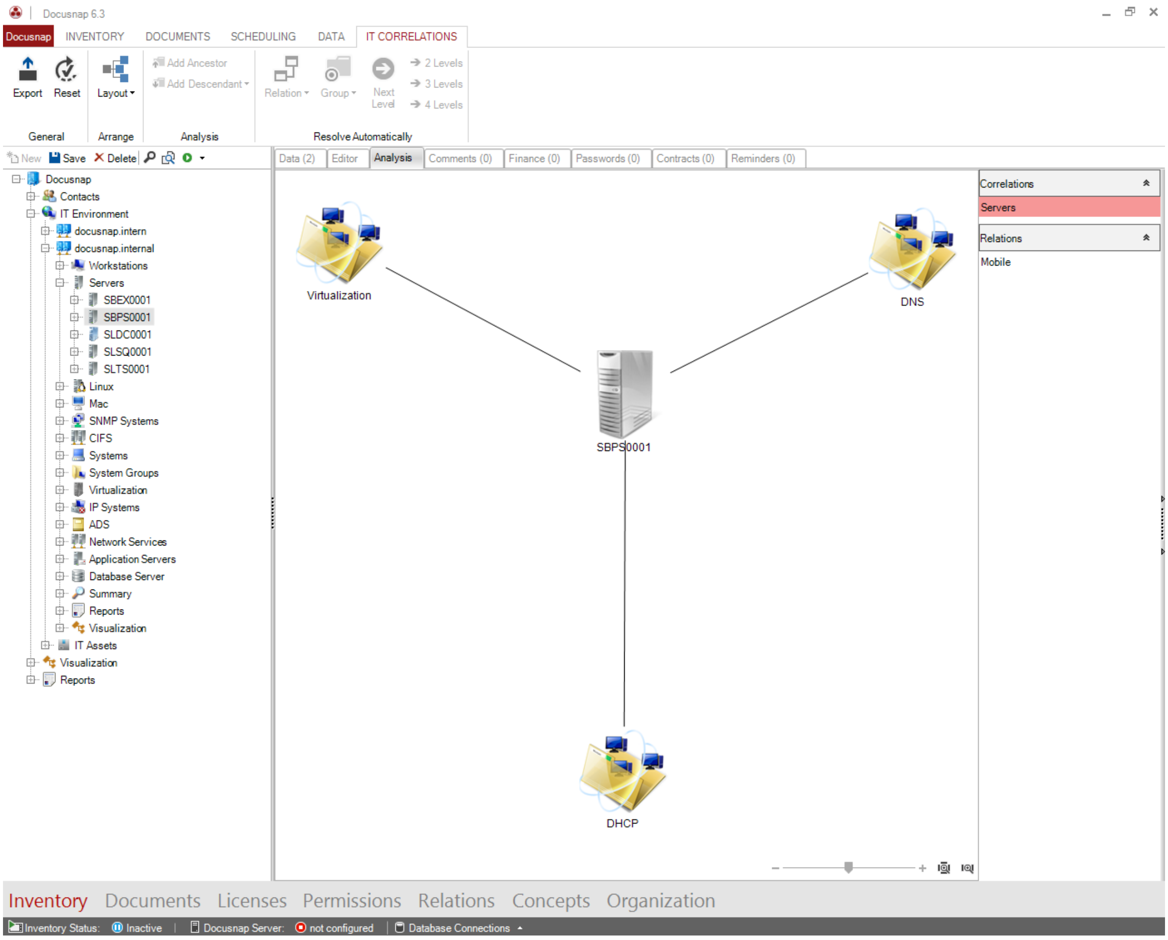
On the *Relations* tab, you can create diagrams that show the relations between different elements. The current *Inventory* tree view will be displayed in a separate pane at the right. From this tree, you can drag the components required for the diagram to the main window while holding the left mouse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

In addition you can also add IT Correlations for the different objects.



2.6.3.12 Analysis

The *Analysis* tab is displayed, if the selected object in the tree view is used in a Relation or is defined as a starting object for an IT Correlation.

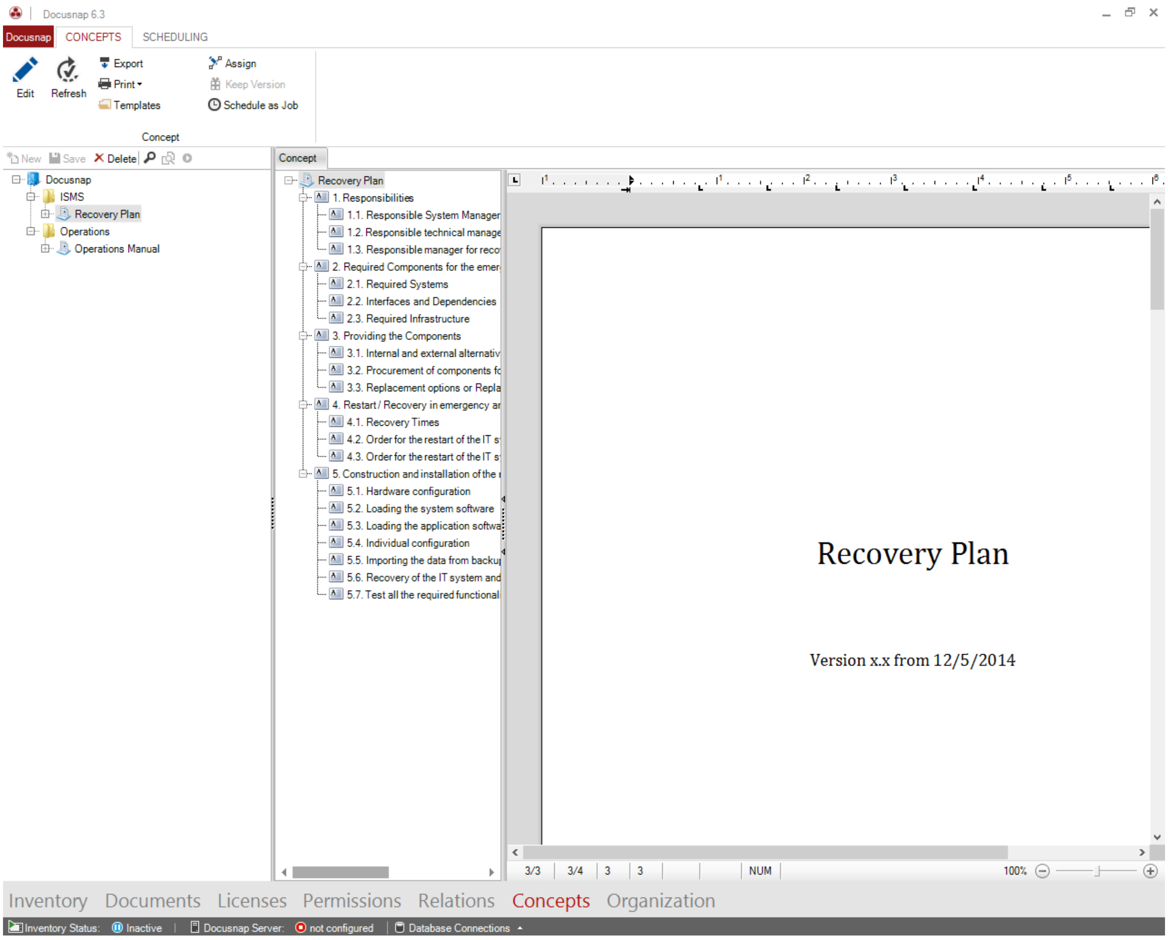


On this tab, the *IT Correlations* and *Relations* are displayed. In the window on the right side in addition to the *IT Correlations* all *Relations* this object are listed. Click on the desired entry to switch between the graphics.

2.6.3.13 Concepts

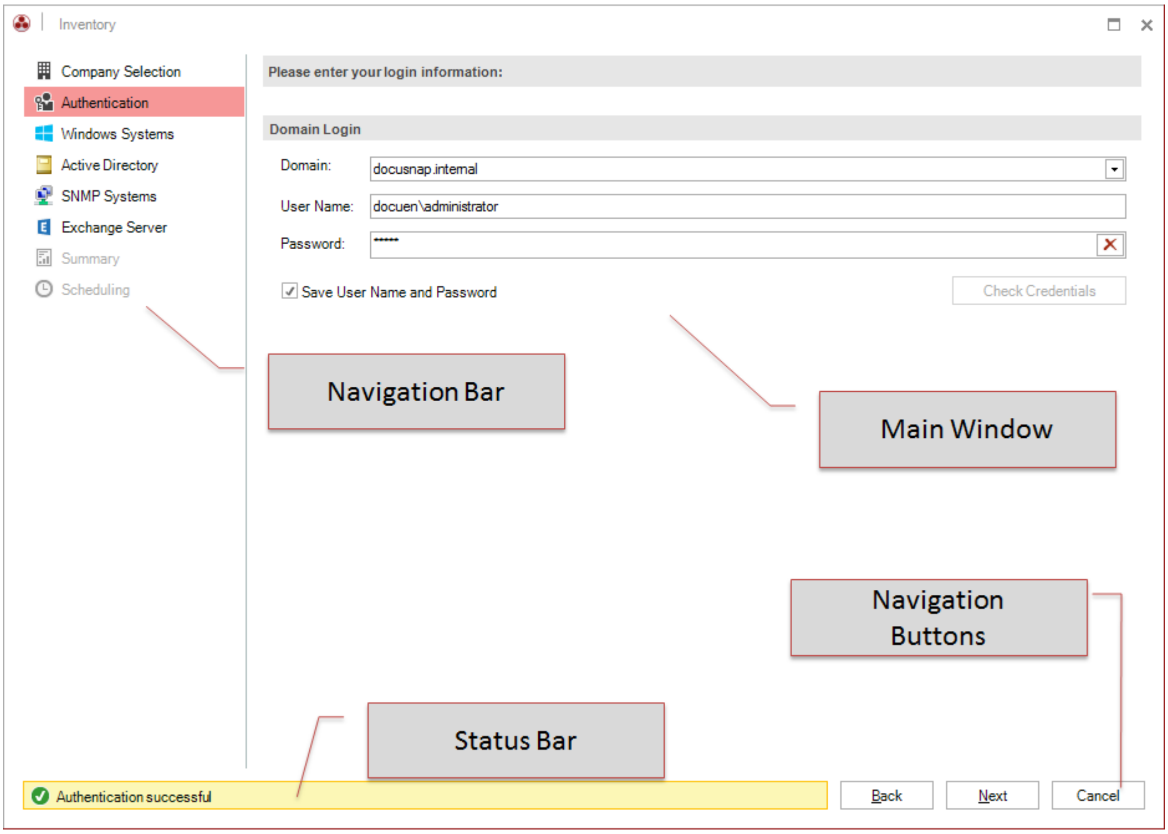
The *IT Concepts* tab displays the document currently selected in the Explorer.

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



2.7 Basics Wizards

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



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

Navigation Bar

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

Main Windows

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

Status Bar

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

The following message types are used:

- Success
- Error
- Warning
- Information

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

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

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

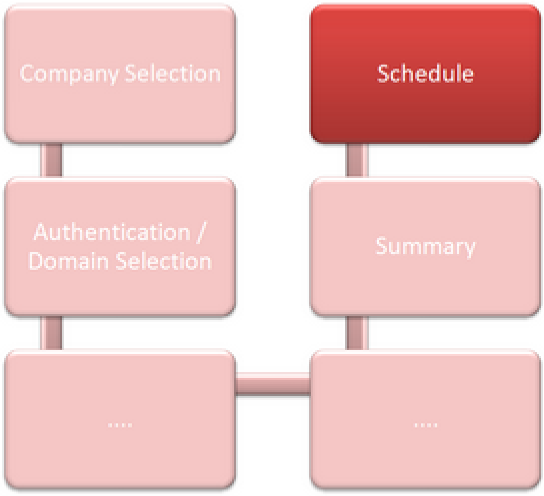
Cancel immediately terminates the wizard. If the wizard is performing a critical action at the time you click the Cancel button, such as a database operation, this action will be safely completed before the wizard closes. This ensures that Docusnap and the Docusnap database remain in a consistent state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

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

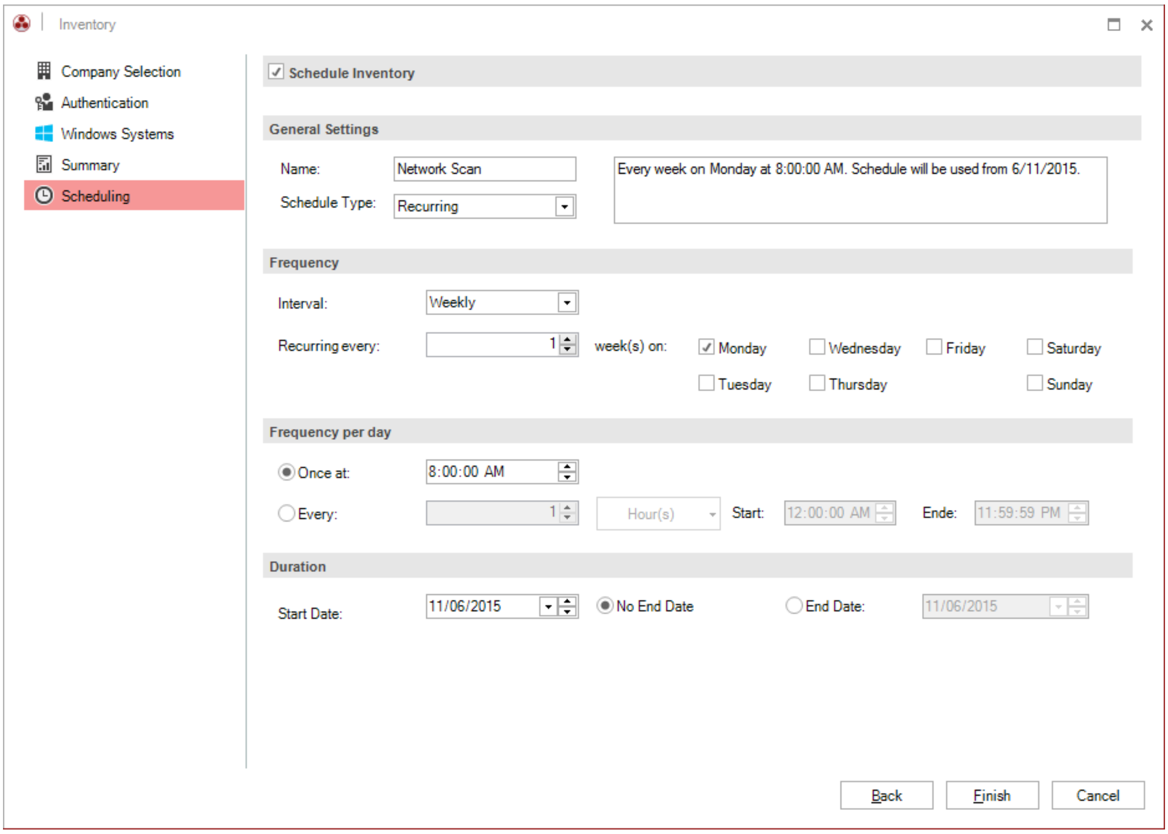
After the inventory scan has completed, only the *Close* button will be available on the *Report* page.

2.7.1 Scheduling

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



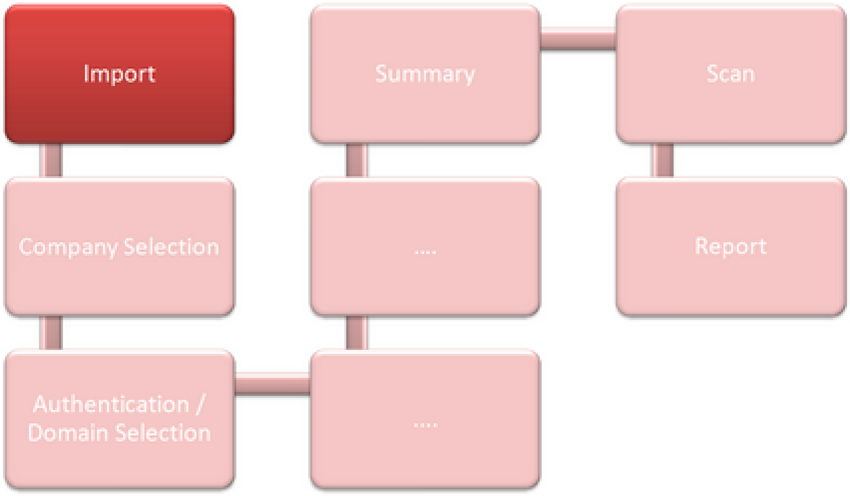
Scheduling is an essential component of Docusnap and allows you to fully automate the inventory and documentation procedures. Before the *Docusnap Server* can process jobs, the desired settings must be configured and saved for the job.



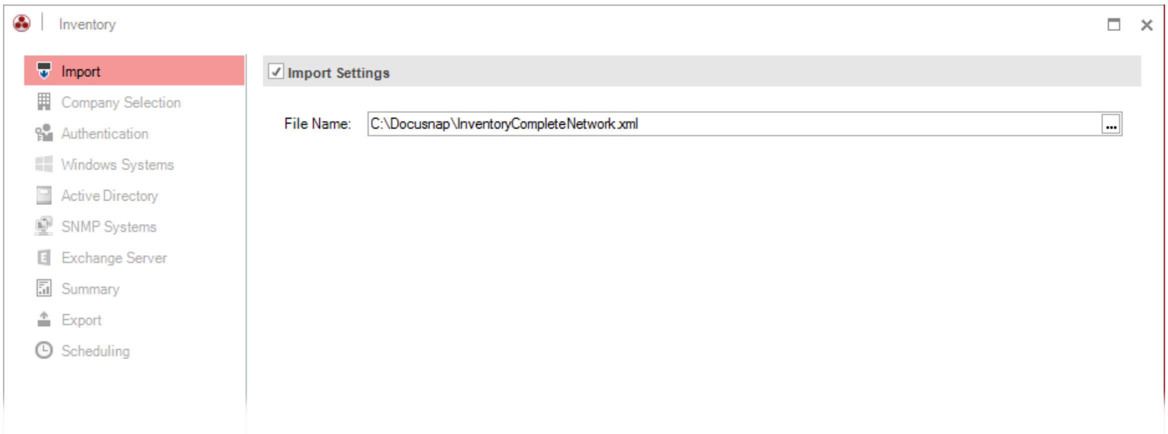
Assign a unique name to the job in the *Name* field so that it can be identified by its name in the scheduling dialogs. The field to the right can be used to summarize the selected configuration.

2.7.2 Optional: Import

The *Import* step is only displayed in the *Complete Network* wizard if the *Import Saved Settings* checkbox has been enabled on the *General* page of the Configuration - Inventory dialog.

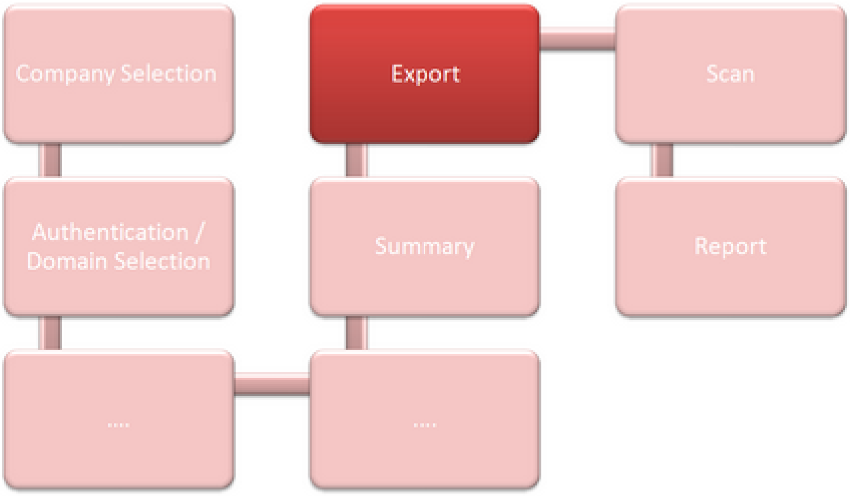


You can use the *Import* step to load a saved configuration. This option is particularly helpful if you need to perform inventory scans repeatedly and with the same settings. Before you can import the .xml file that contains the configuration, it must have been saved in the Export step. When you select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



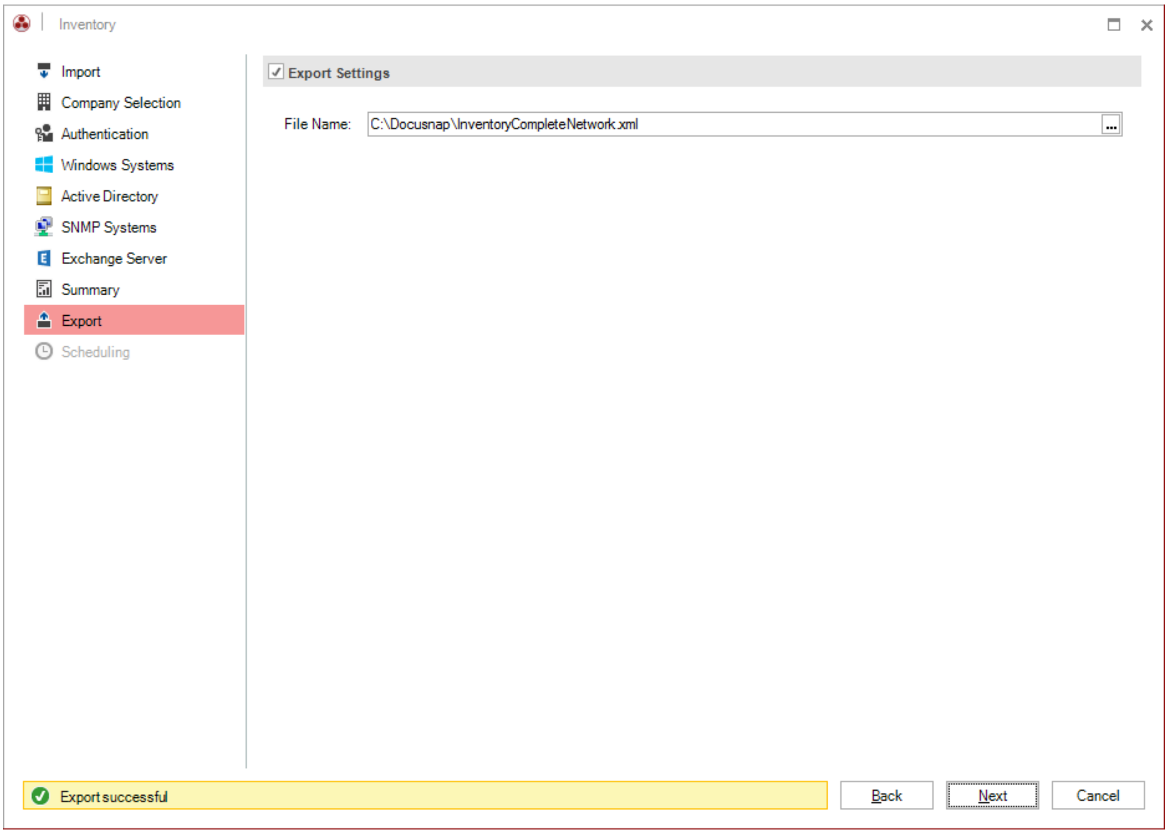
2.7.3 Optional: Export

The *Export* step is only displayed in the *Complete Network* wizard if the *Export Settings* checkbox has been enabled on the *General* page of the Configuration - Inventory dialog.



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

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

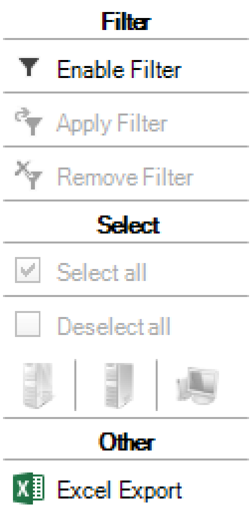


2.8 Filtering

Filtering in Main Window

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

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



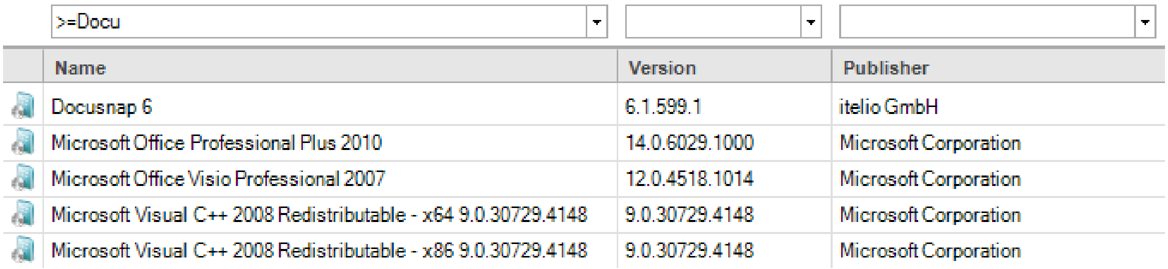
Clicking the *Enable Filter* button displays text fields above the main window columns where you can specify the desired filters or enter keywords. The table displayed in the main pane of the wizard will be filtered by those keywords.

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)	**>Docu** would filter for entries sorted alphabetically after "Docu".
>(less than) or.**>=** (less than or equal to)	**<Docu** would filter for entries sorted alphabetically before "Docu".

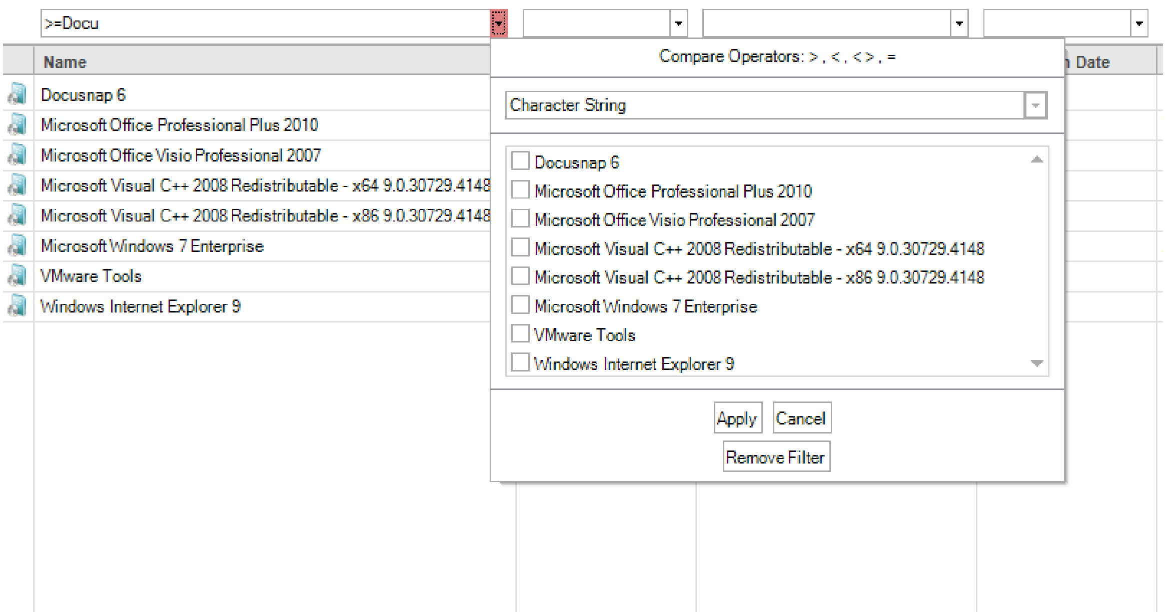
<>(not equal)	**<>Docu** would explicitly exclude the "Docu" entry when filtering.
=(equal)	**=Docu** would only show entries that match "Docu" exactly.



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*. To 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...)



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

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

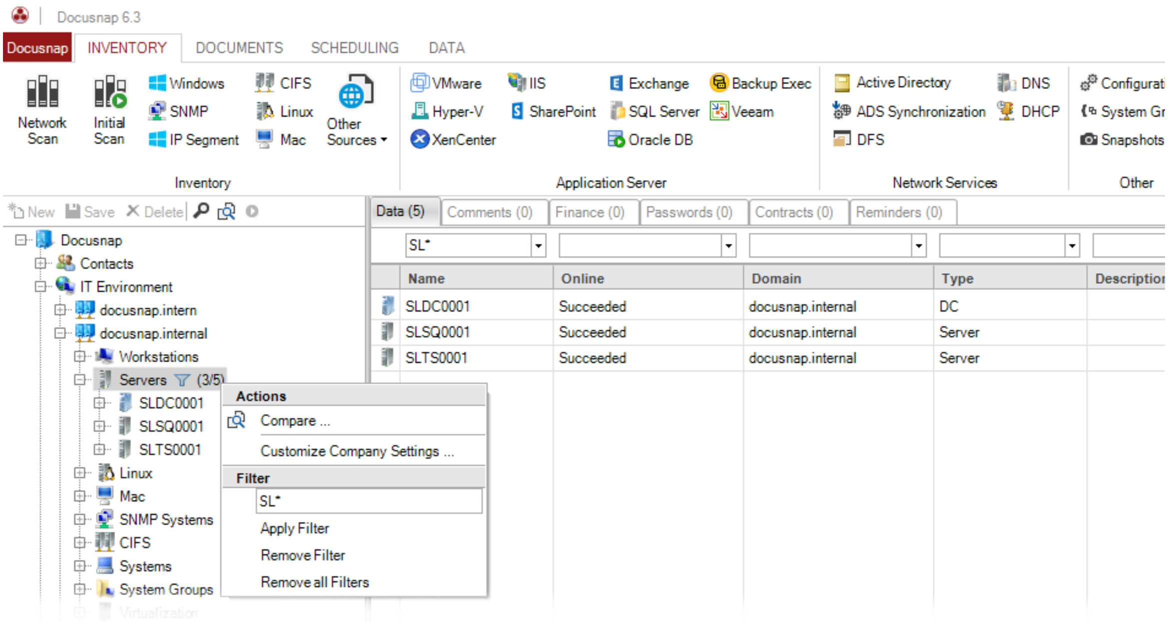
Filtering the Explorer

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

To specify a filter criterion, enter it in the text field below the "Filter" caption. As with the main window filter, both the "*" and "?" wildcards, 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.

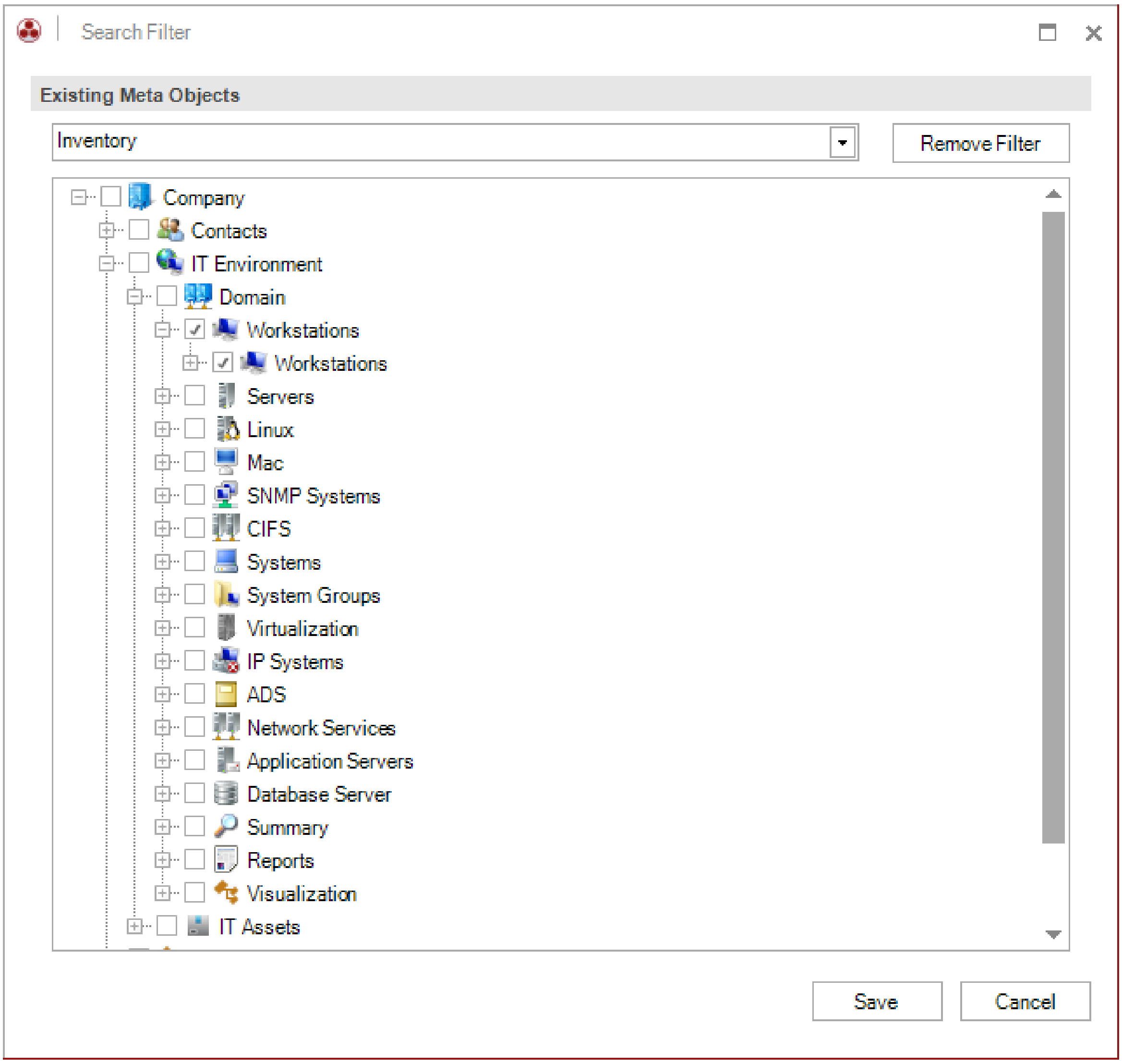


2.9 Search

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

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

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



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

Control	Description

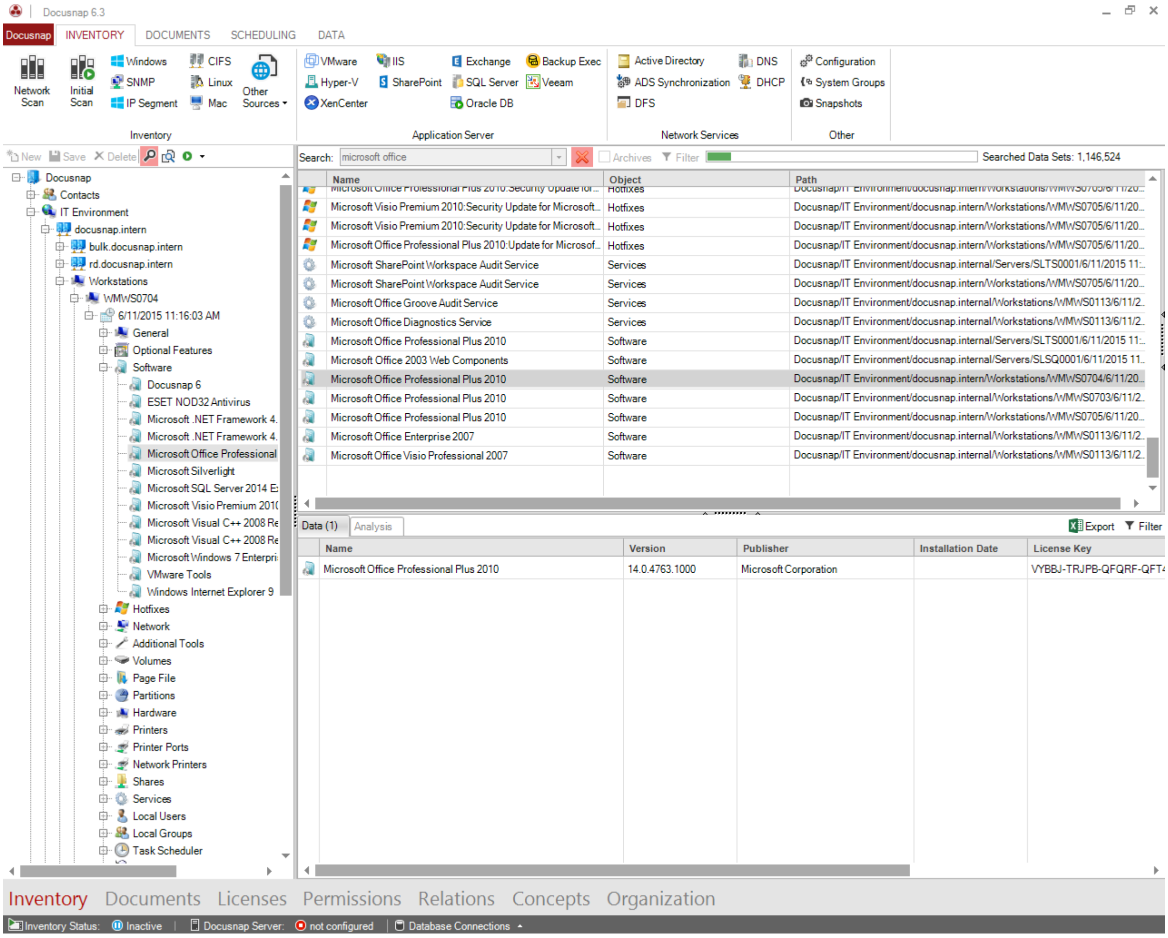
Combo box	Here, you can enter the search string.
Archive	If you *enable* this checkbox, all existing snapshots will be searched. If the checkbox is *disabled*, only the current snapshots will be searched.
/	Starts or terminates the current search.
Filter	A filter can be used to restrict the search to specific meta objects.
Progress bar	The green progress bar remains visible until the search has completed.

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

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

Example

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

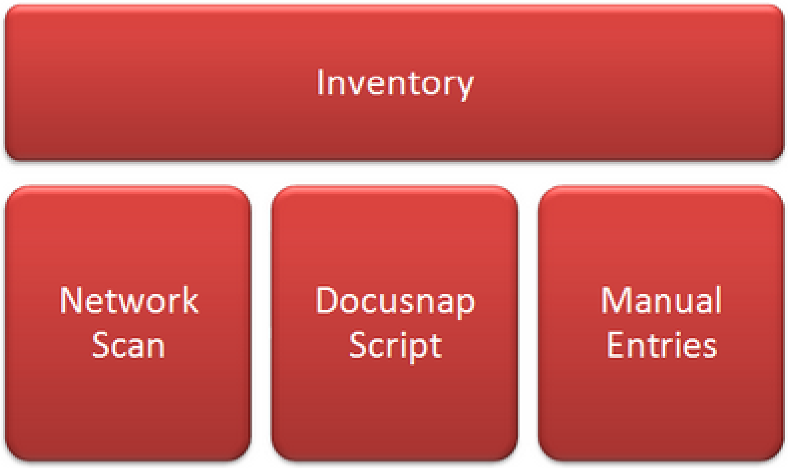


The search results will be displayed in the upper pane of the main window. There, you can see the name, object type and path of the objects found by the search. When you double-click a search result entry in this pane, the associated object will be highlighted in the tree view and its data displayed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

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

Part III

3 Inventory



Network Inventory

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

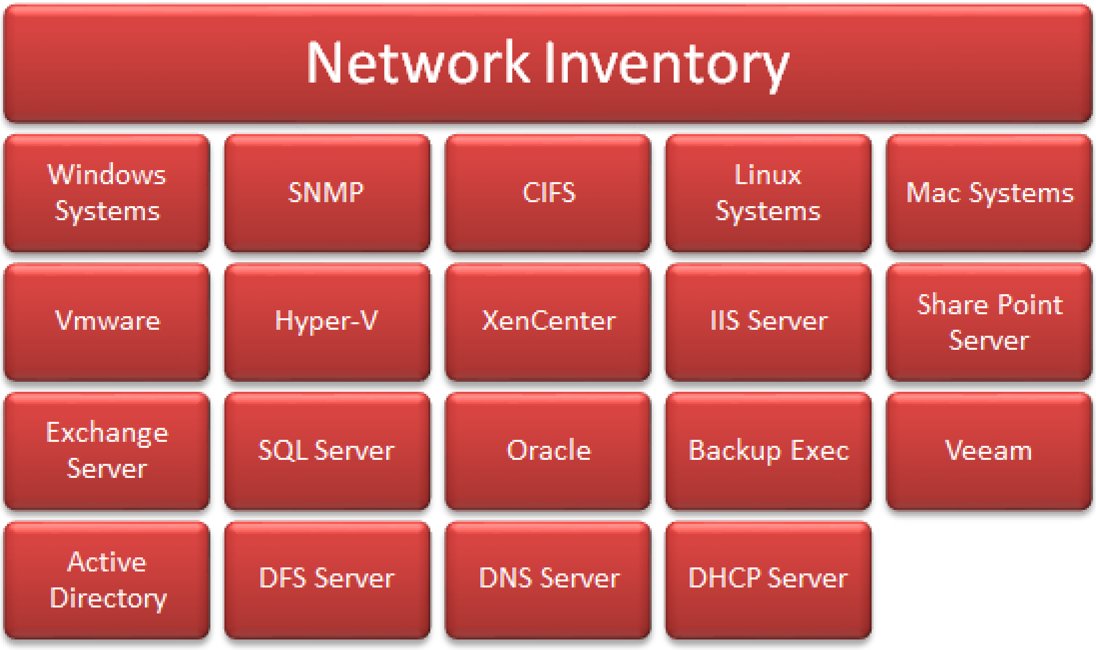
Docusnap Script

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.

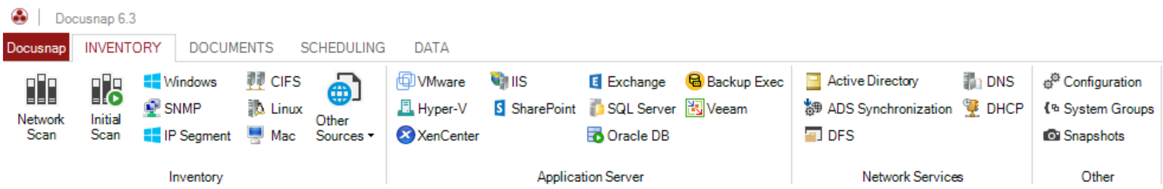
Manually Create Systems

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

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.



Inventorying the Network

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

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

Initial Scan

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

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.

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 Permission Analysis).

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.

Oracle

Use this wizard to inventory the existing Oracle databases on a server.

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.

Backup Exec

Use the *Backup Exec* wizard to inventory the *Backup Exec* infrastructure.

Distributed File System (DFS)

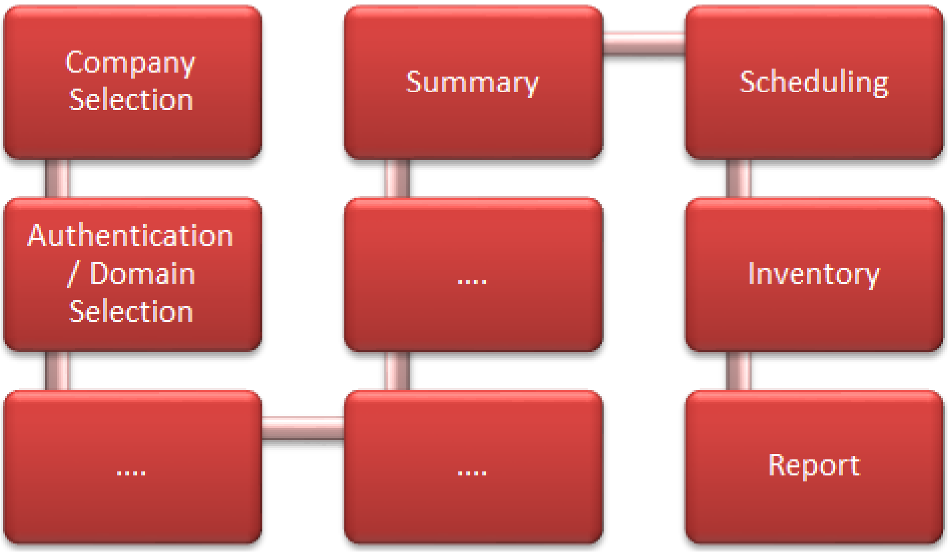
Use the DFS wizard to inventory the Distributed File System.

Veeam

The Veeam infrastructure can be inventoried through the wizard *Veeam*.

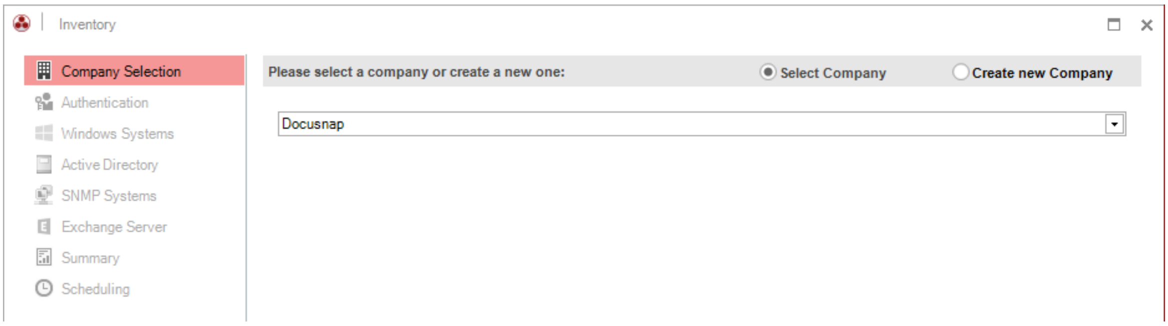
3.1.1 Basic Steps

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.

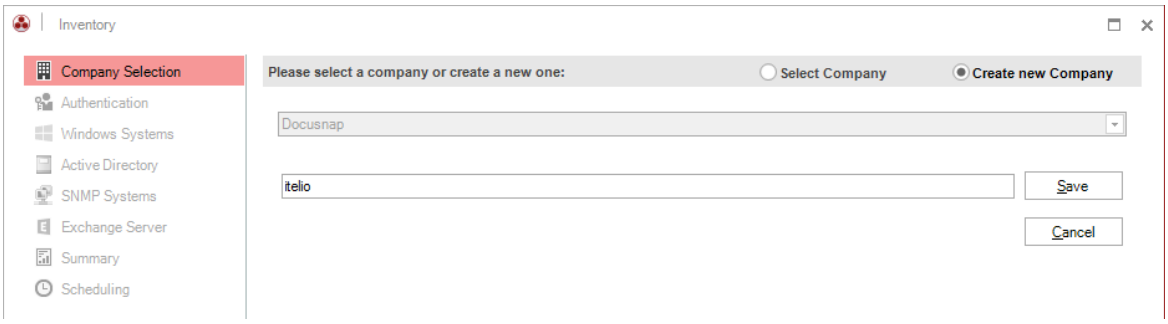


3.1.1.1 Company Selection

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.



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.



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 *Inventory* tree view. This means that, if no Active Directory Domain Service is available, a domain name must nonetheless be entered for purposes of logical organization in the Docusnap tree view.

Authentication

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

- Complete Network
- NTFS Permissions
- Windows
- Exchange Server
- Active Directory
- DHCP Server
- DNS Server
- Hyper-V
- SharePoint
- IIS (Internet Information Service)
- Distributed File System (DFS)

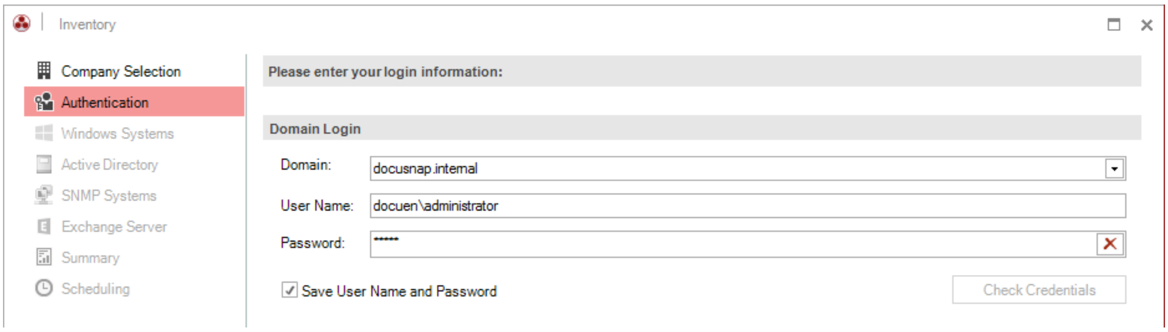
For an *Active Directory* domain authentication, enter the domain name in the *Domain* field. If it is necessary to enter your username and password, depends on the following:

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

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

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

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

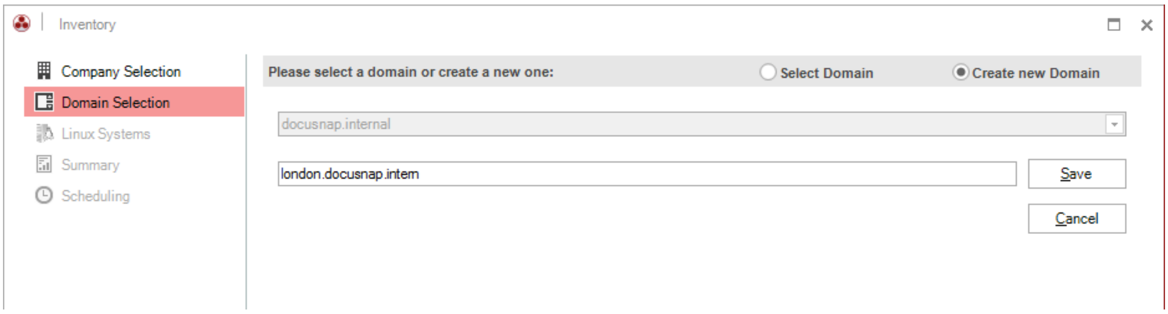


Selecting a Domain

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

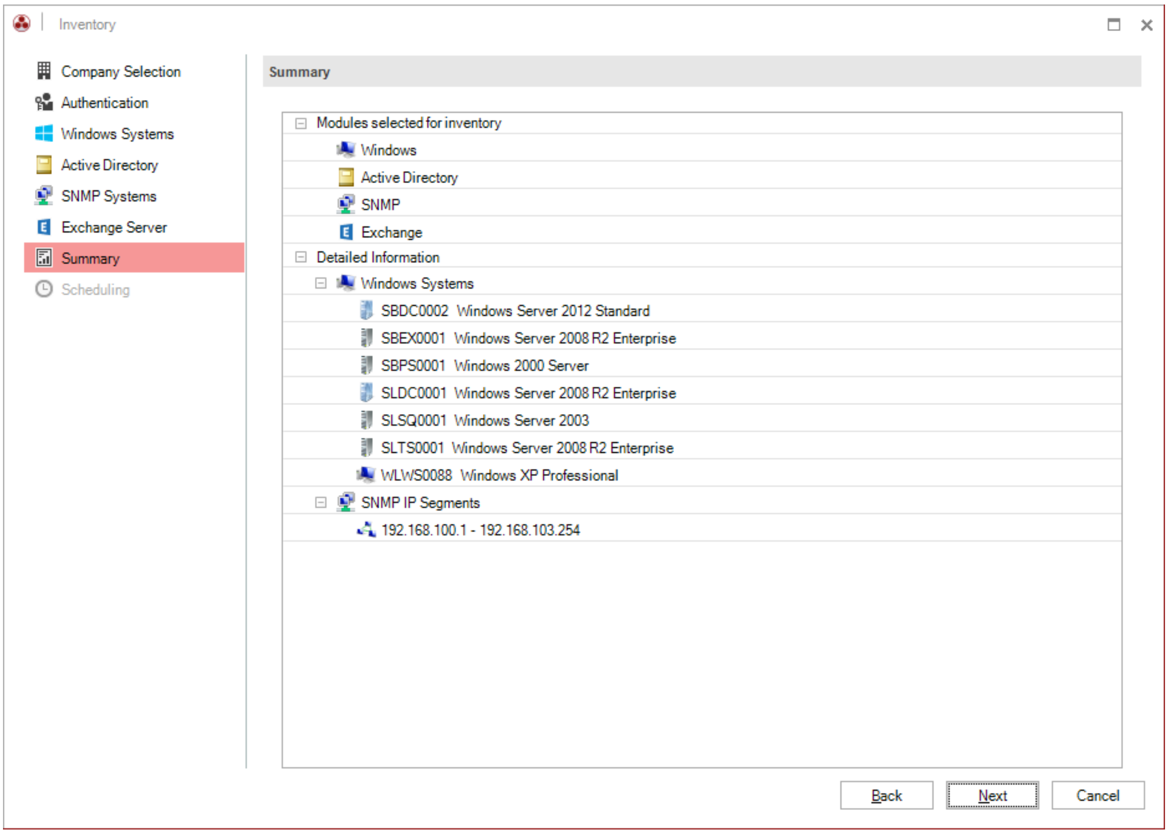
- SNMP
- Linux
- Mac
- IP Segment
- CIFS
- SQL Server
- VMware Infrastructure
- XenCenter
- Backup Exec
- Oracle DB
- Veeam

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.



3.1.1.3 Summary Page

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



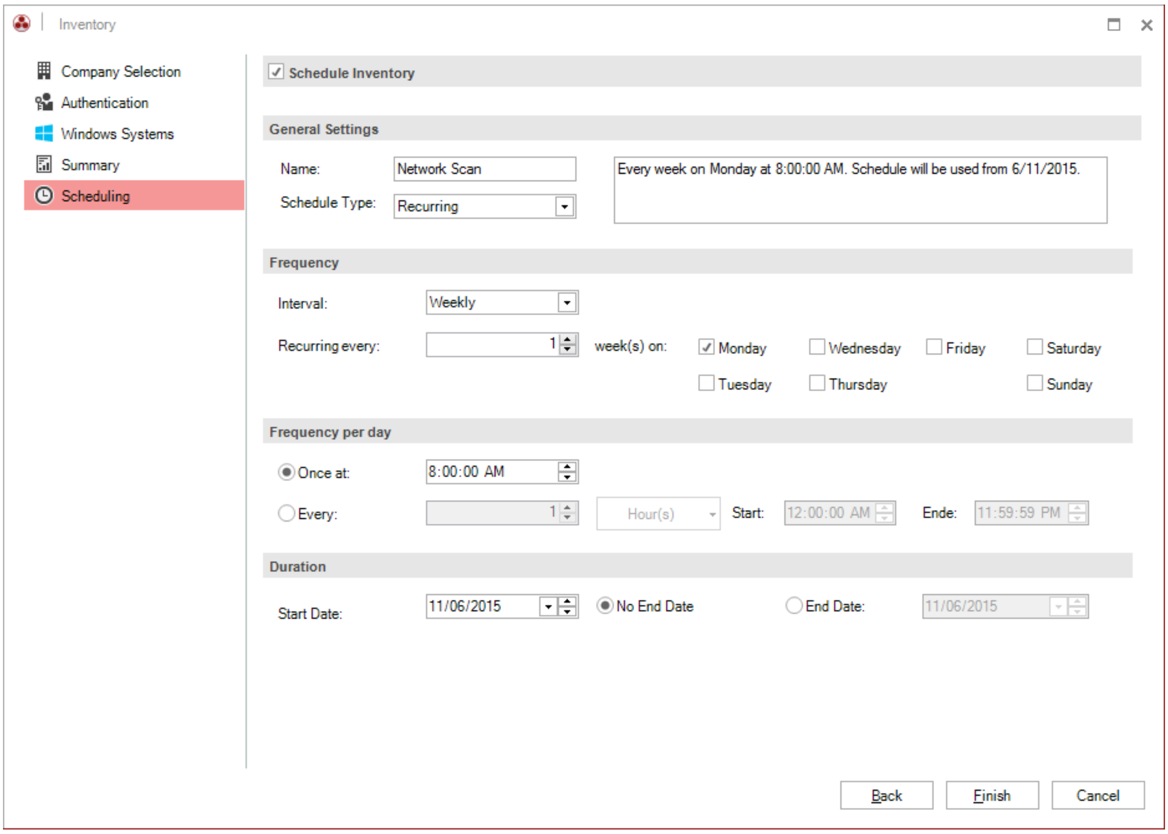
3.1.1.4 Scheduling

The *Scheduling* step is available in all wizards.

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

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

Assign a unique name to the job in the *Name* field so that it can be identified by its name in the scheduling dialogs. The field to the right is used to summarize the selected configuration. Click the *Finish* button to save the configuration of the job and close the wizard. The Docusnap Server will execute the inventory at the scheduled time automatically.



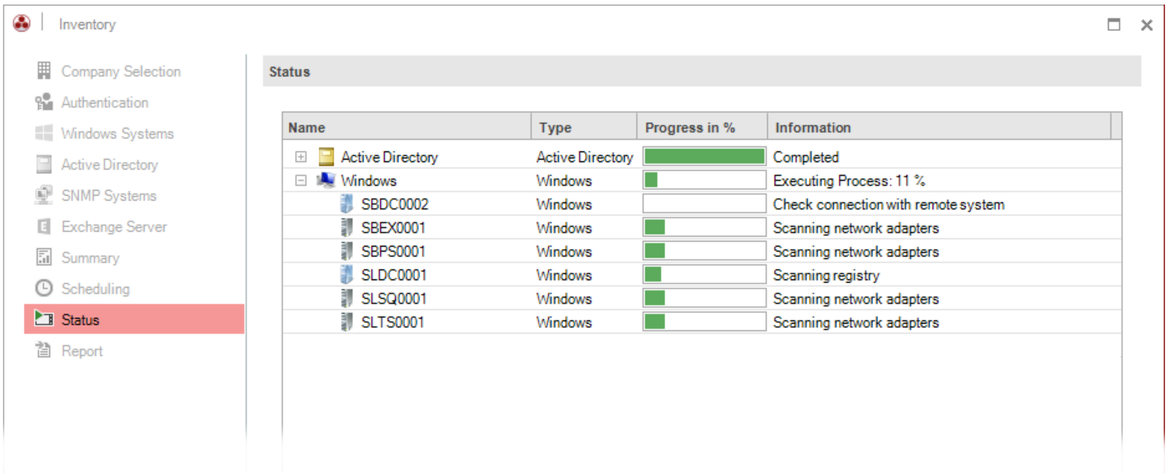
3.1.1.5 Status

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:

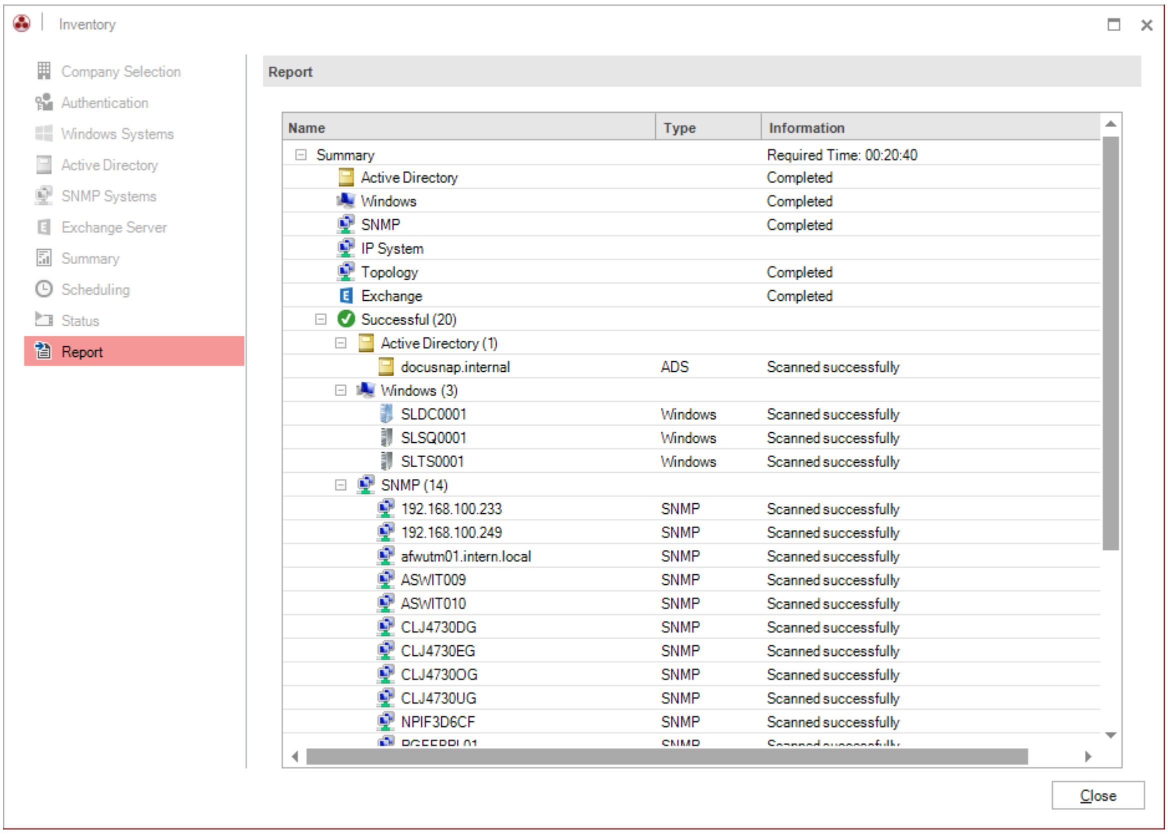
- A green progress bar indicates that a task has been performed successfully.
- A yellow progress bar shows that some information could not be determined for the corresponding step.
- A red progress bar indicates that an error has occurred during the inventory scan.

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



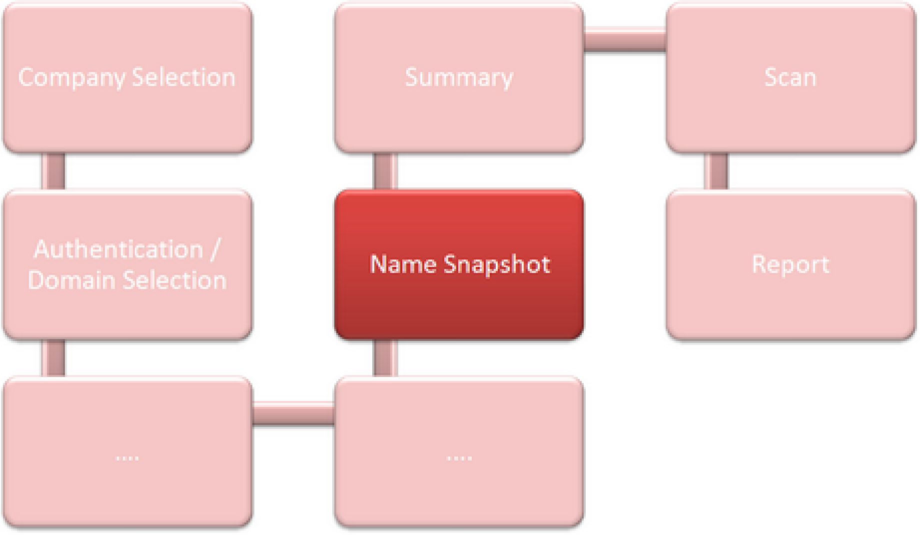
3.1.1.6 Summary Page

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.



3.1.1.7 Optional: Naming Snapshots

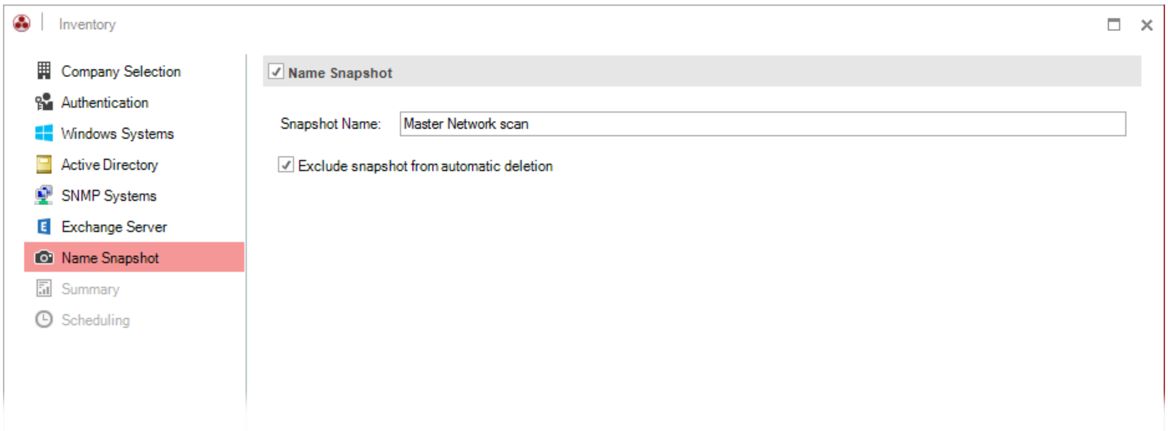
As already described in the Basics - Docusnap Wizards section, Docusnap wizards can be extended as needed. To enable the *Name Snapshot* step, open the *General* page of the *Configuration - Inventory* dialog.



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

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

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



3.1.2 Initial Scan

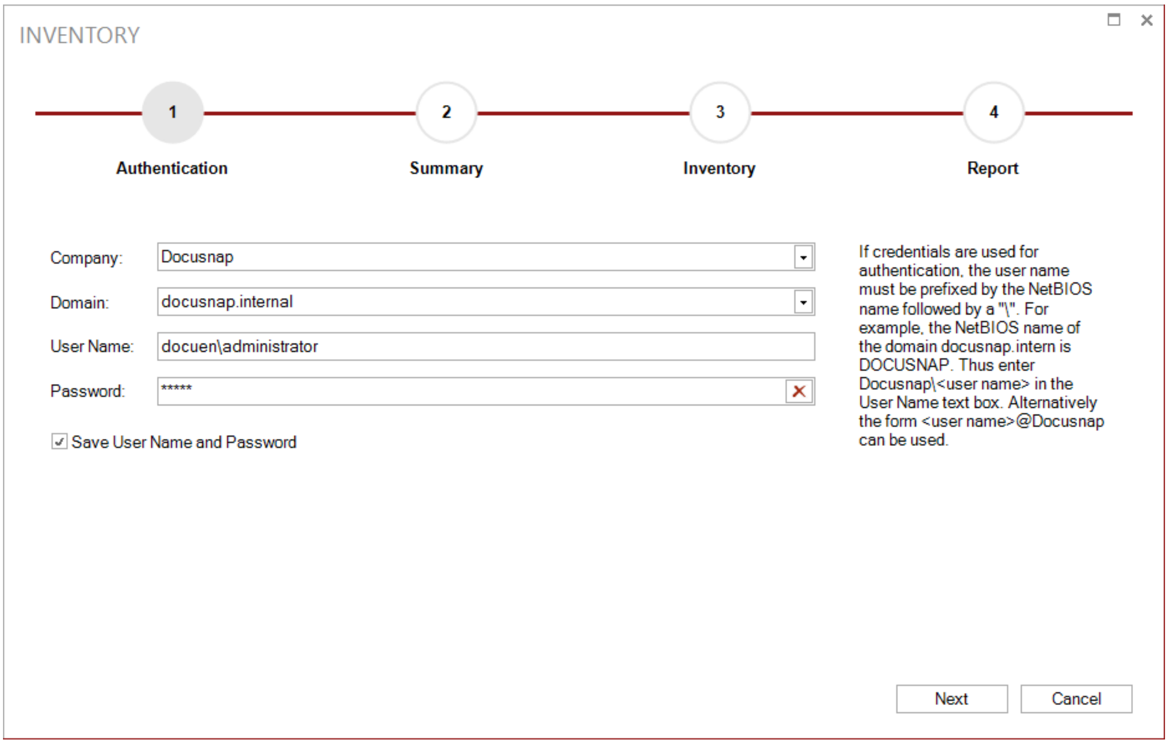
With the first start of Docusnap the *Initial Scan* opens to inventory basic data. If the initial scan should not be executed, it can be closed by clicking on the *Cancel* button. In the ribbon *Inventory* the Initial Scan can be opened again.

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

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

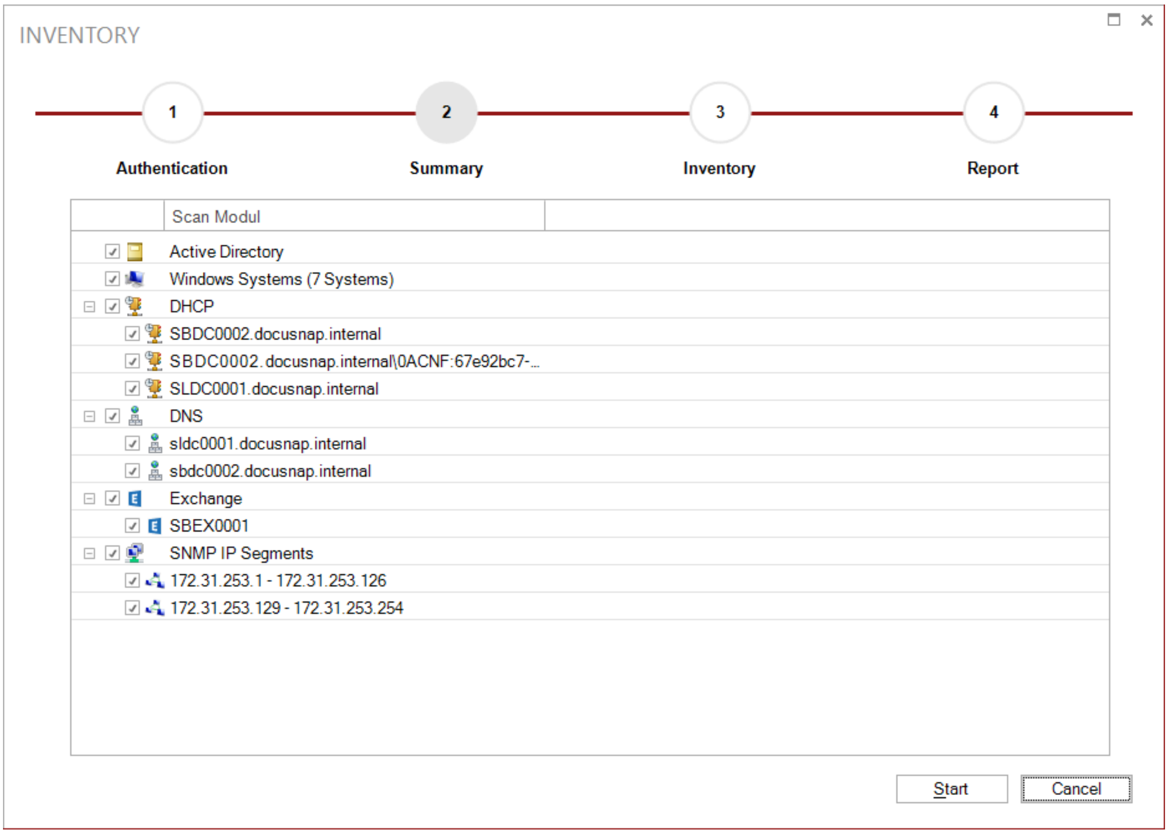
If you need to enter your credentials for authentication, the NetBIOS name, followed by a backslash (\), must precede the user name. For example, the NetBIOS name of the domain named docusnap.intern is DOCUSNAP. Therefore, you would have to enter the following user name: *DOCUSNAP\<UserName>* Alternatively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

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

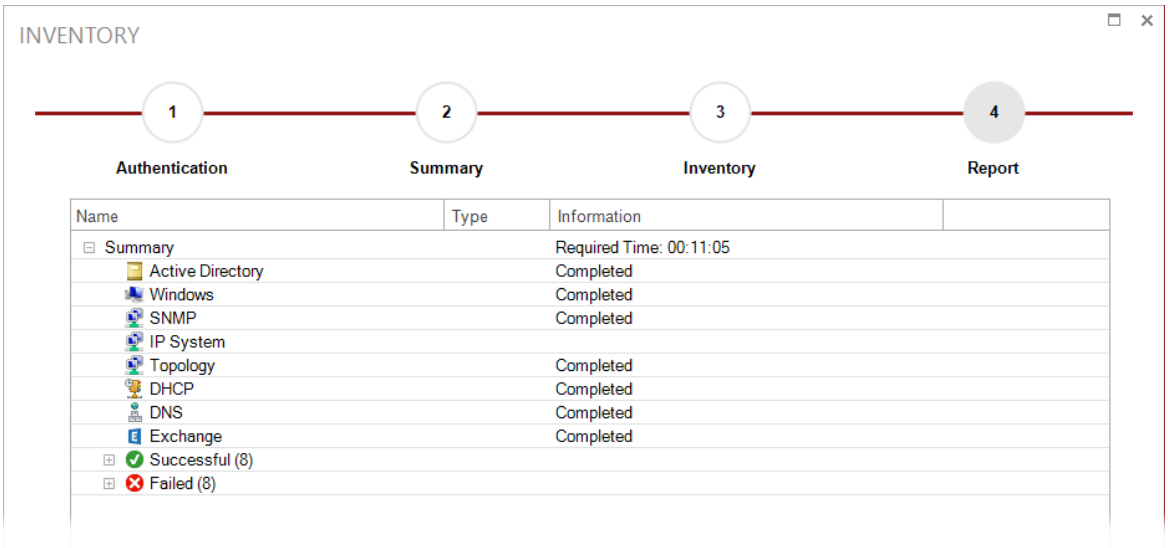


In step Summary all modules are listed, which can be inventoried with the initial scan. With the associated checkbox can be determined which data are to be inventoried. By clicking on Start the inventory process is started.

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



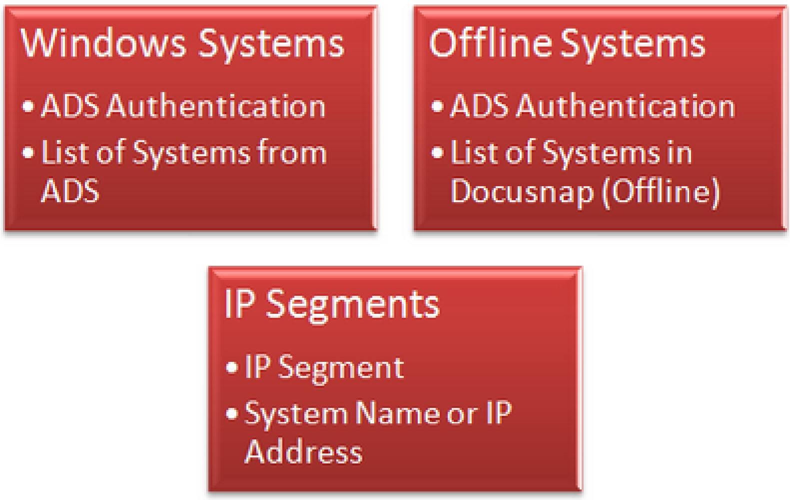
In the step *Inventory* the progress of the inventory will be displayed.



The step *Report* shows all successful, partially successful and failed inventory steps. Click the *Close* button to close the wizard.

3.1.3 Windows

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



These are the differences:

Windows Systems

When you click either the *Network Scan* 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

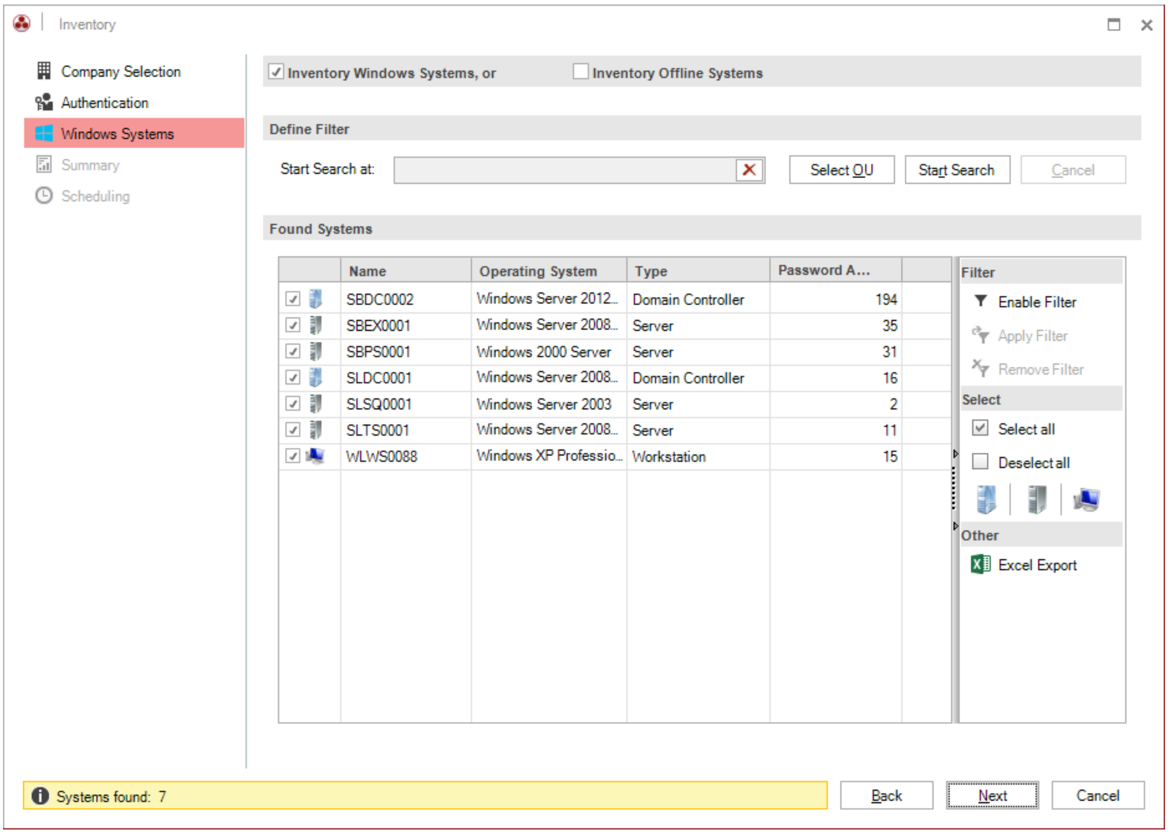
Click the *IP Segments* button to scan Windows systems which are not part of the Active Directory, for example, workgroup computers. Based on the specified IP ranges, IP addresses or computer names, Docusnap attempts to identify Windows systems in the network and to inventory them in subsequent steps.

Offline Systems

If any systems cannot be reached at the time of a Windows inventory scan, Docusnap will assign the *Offline* status to them. These systems can be inventoried explicitly in course of another *Windows Inventory*.

3.1.3.1 Windows Systems

To start the wizard for inventorying your Windows systems, click the *Network Scan* 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: Basic Steps).



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.

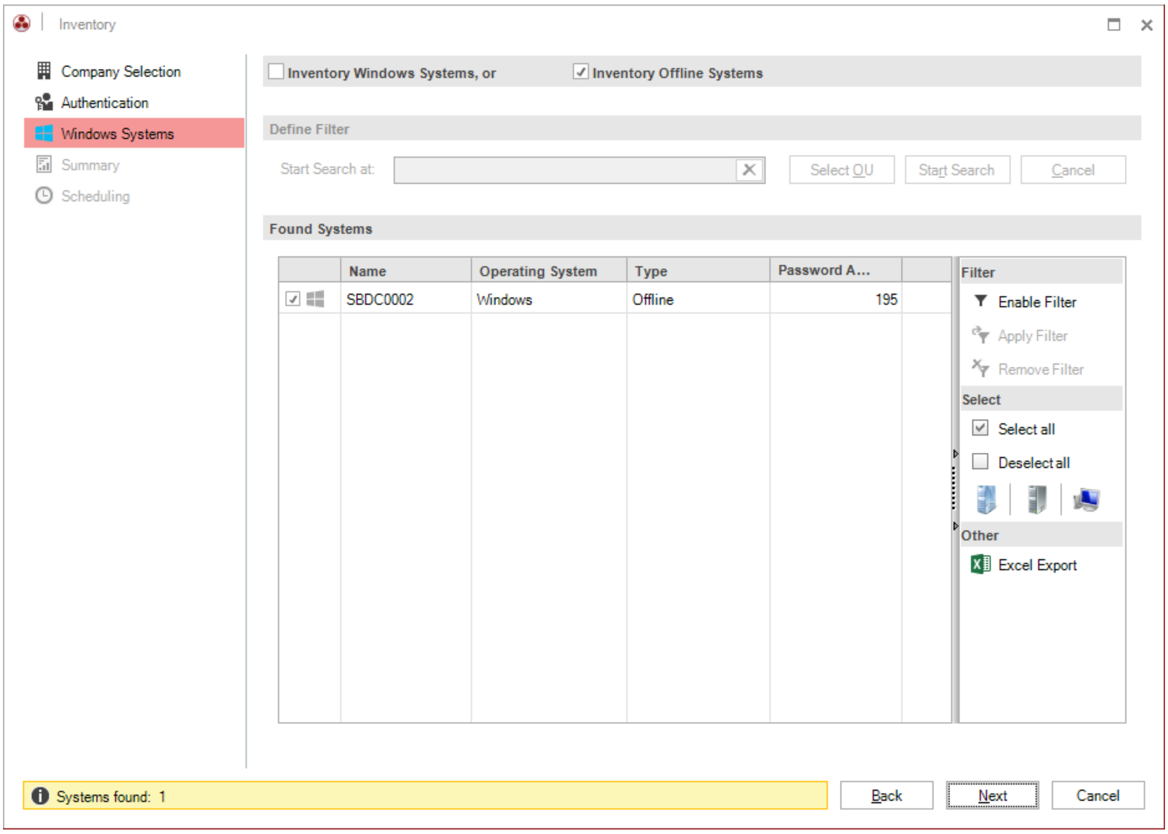
There are several ways to select the systems to be inventoried. To select or deselect a certain system, you can use the checkbox next to its name. By default, all devices are selected.

In addition, a flyout pane will appear to the right of the list. There, you can filter, select and export the displayed systems (see: Filters 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.

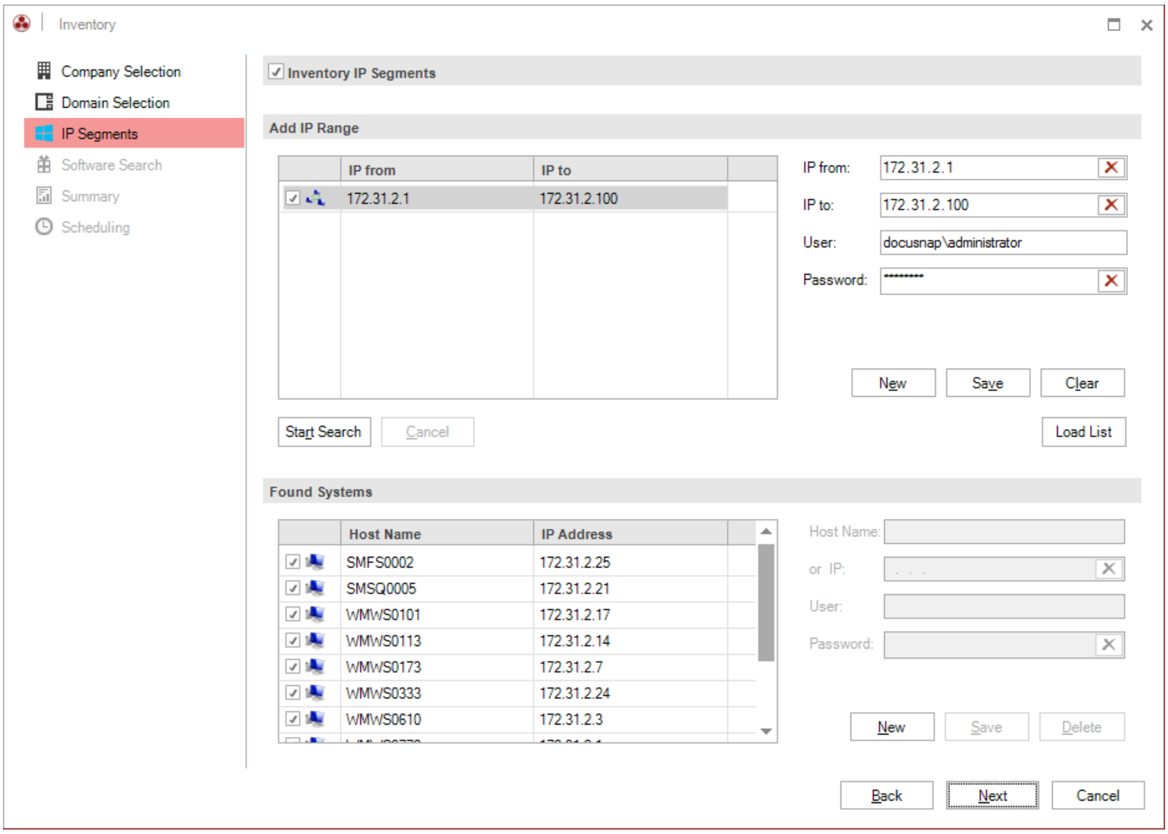
Offline System

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



3.1.3.2 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 *IP Segments* step will be displayed after you have selected a company and a domain.



There are two ways to identify individual systems:

Entering an IP Segment Manually

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

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

Entering Individual Computers Manually

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

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

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

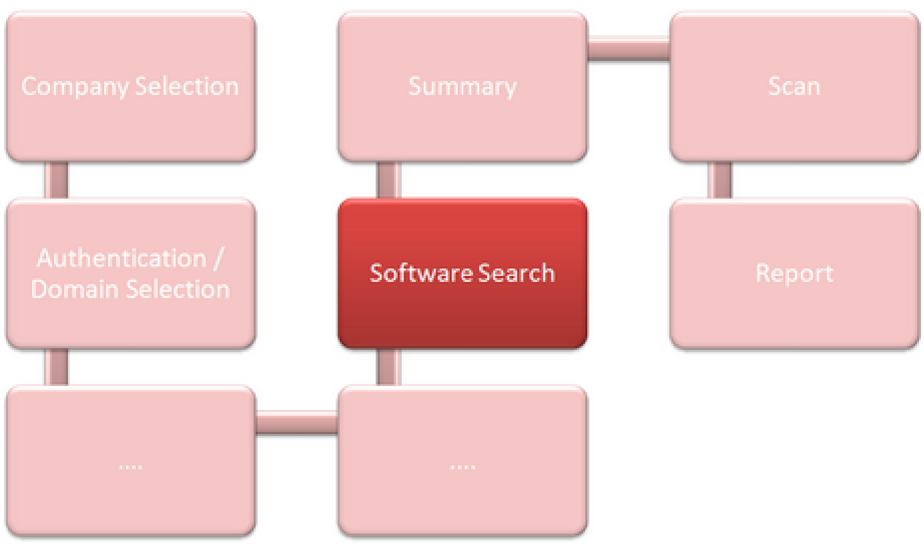
The actual inventory process is based on the systems listed in the *Found Systems* group. All systems selected there will be scanned.

3.1.3.3 Optional: Software Search

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

The Software Search step is available in the following wizards:

- Network Scan
- Windows 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 *Software Search* dialog in the Docusnap Management.

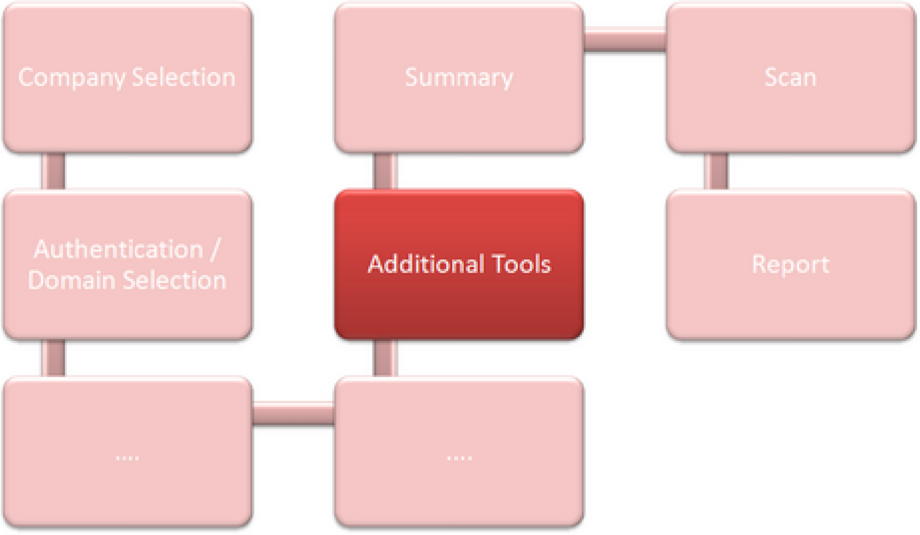
All registered software products will be listed as a result of the *Software Search* step. By enabling or disabling the checkboxes, you can determine which products Docusnap will be looking for when performing the automated scan.

3.1.3.4 Optional: Additional Tools

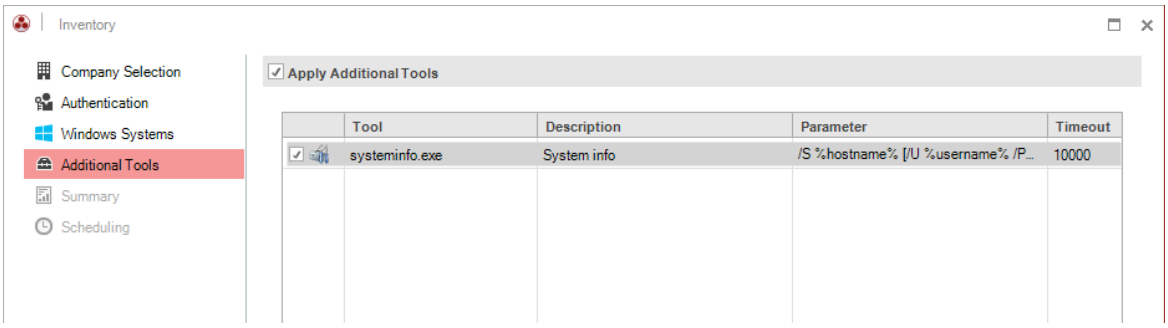
As already described in the Basics - Wizards section, Docusnap wizards can be extended as needed. The Additional Tools step can be enabled from General page of the *Configuration - Inventory* dialog.

The Additional Tools step is available for the following wizards:

- Network Scan
- Windows Systems
- IP Segments



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



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

Additional tools will be executed on the system where the inventory process will be taking place. If, for example, *SystemInfo.Exe* has been integrated as an additional tool, 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 in the Docusnap Management.

3.1.4 SNMP Systems

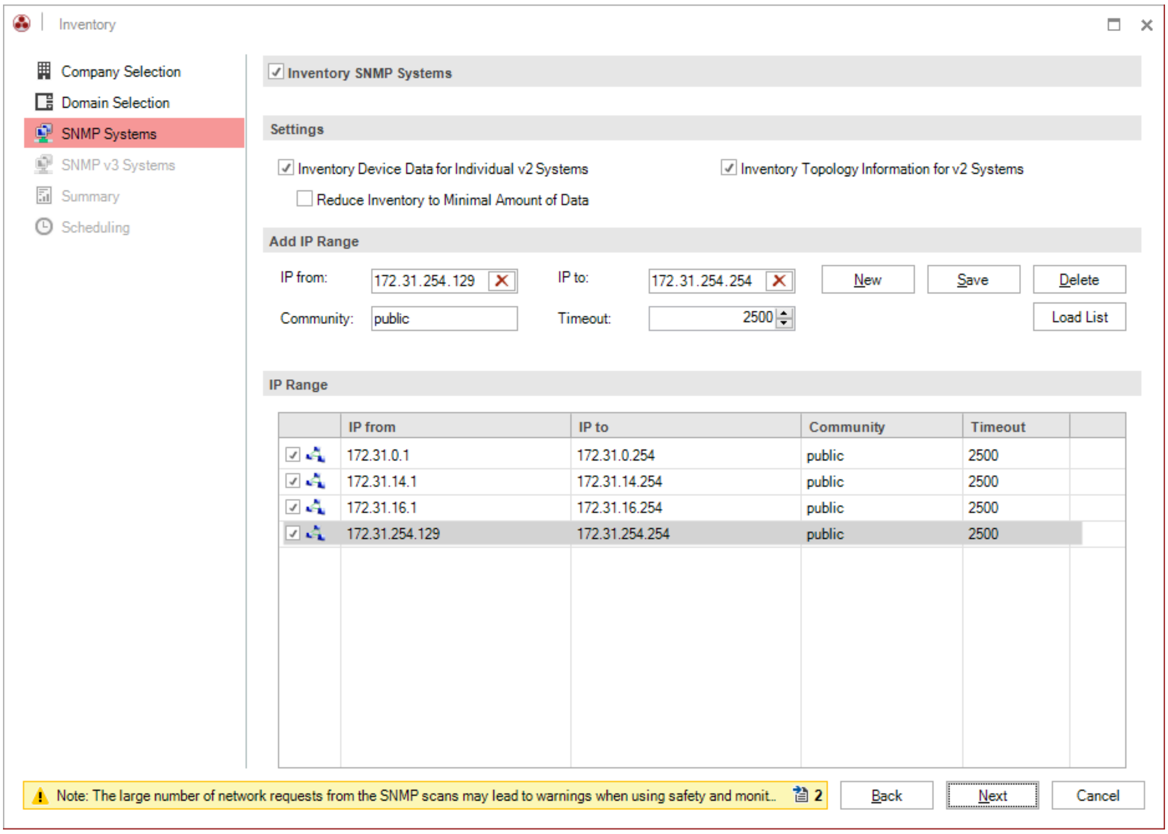
To start the wizard for inventorying *SNMP systems*, click the *Network Scan* or *SNMP* button on the Inventory ribbon. The *SNMP* step will be displayed after you have selected a company and a domain (see: Basic Steps).

Scanning SNMP systems

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

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

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



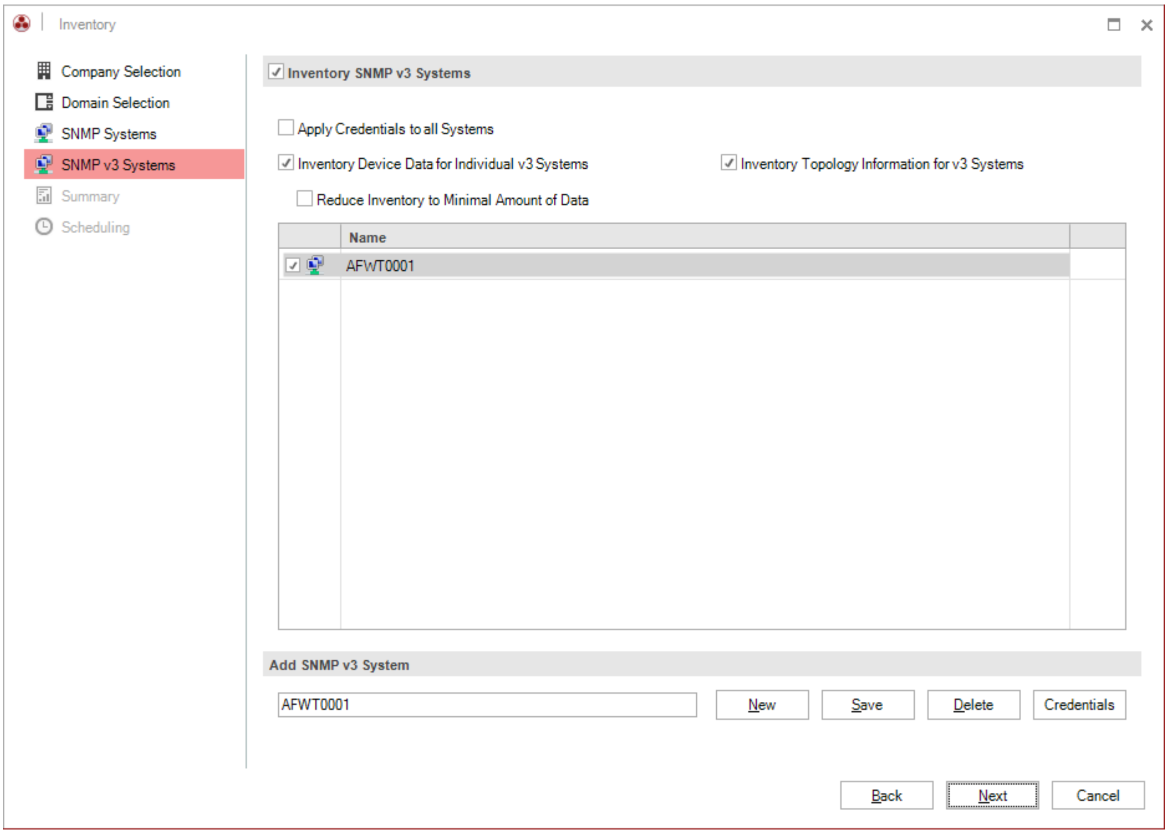
Fill in the *IP from*, *IP to*, *Community* and *Timeout* fields to define the IP range to be scanned. After you have added the desired ranges to the IP Ranges list, you can specify for each range whether or not the inventory scan should be performed by enabling / disabling the checkbox next to it.

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

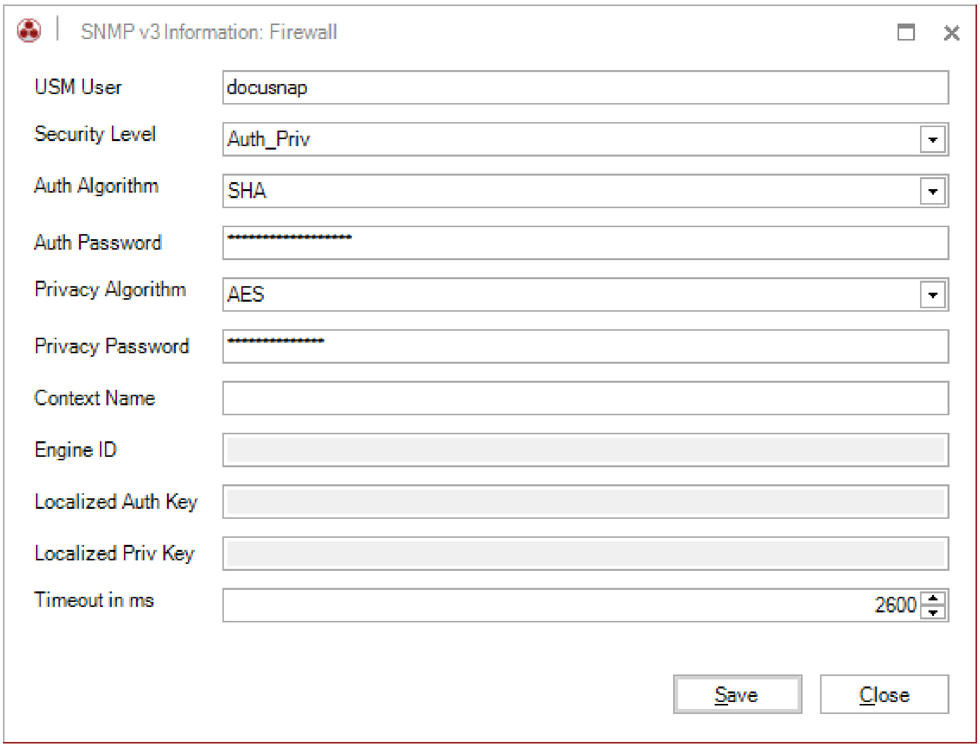
Scanning Systems using the SNMP v3 Protocol

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.

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



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.



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.

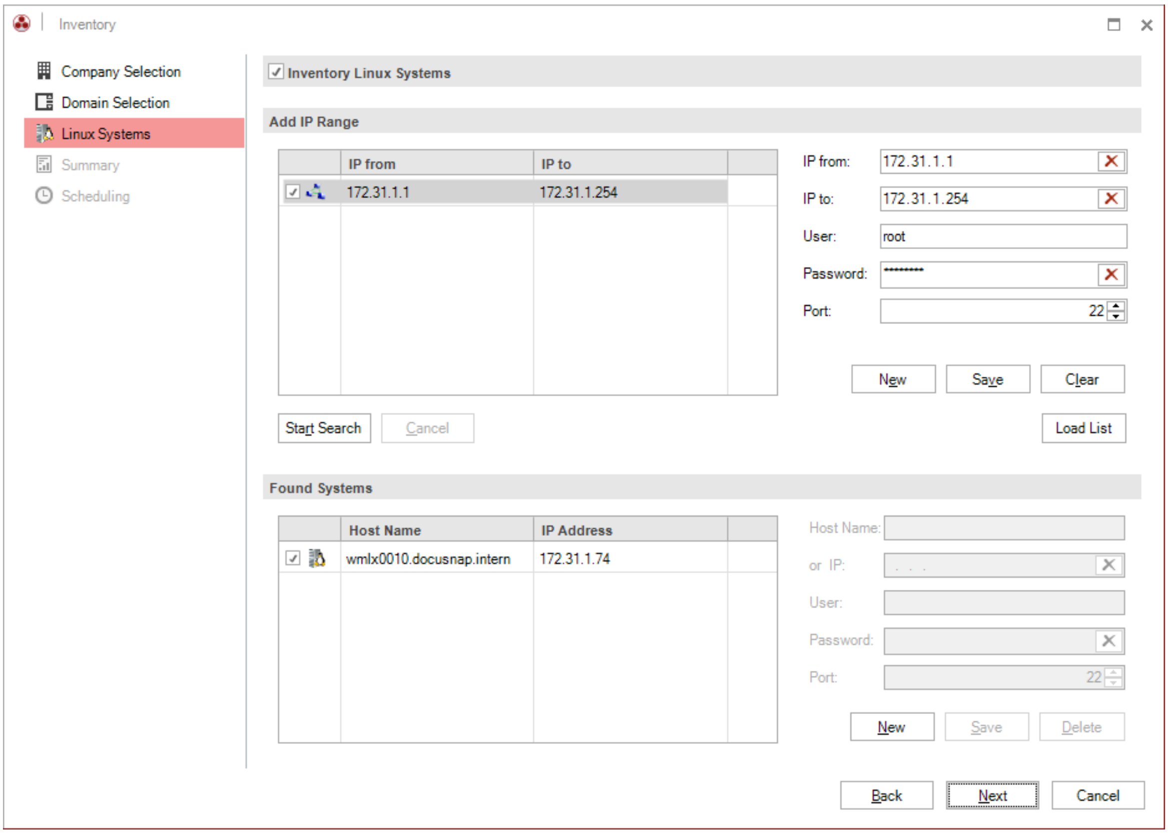
SNMP systems that require the SNMP v3 protocol, but have been listed in the IP range list for the normal SNMP scan (i.e. using the v1 and v2 protocols), will not be considered when scanning the v1 and v2 systems.

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 *Inventory* page of the Configuration dialog).

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

3.1.5 Linux Systems

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



If you define an RSA key on the Wizards page of the General page of the *Configuration - Inventory* 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.

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

Entering Individual Computers Manually

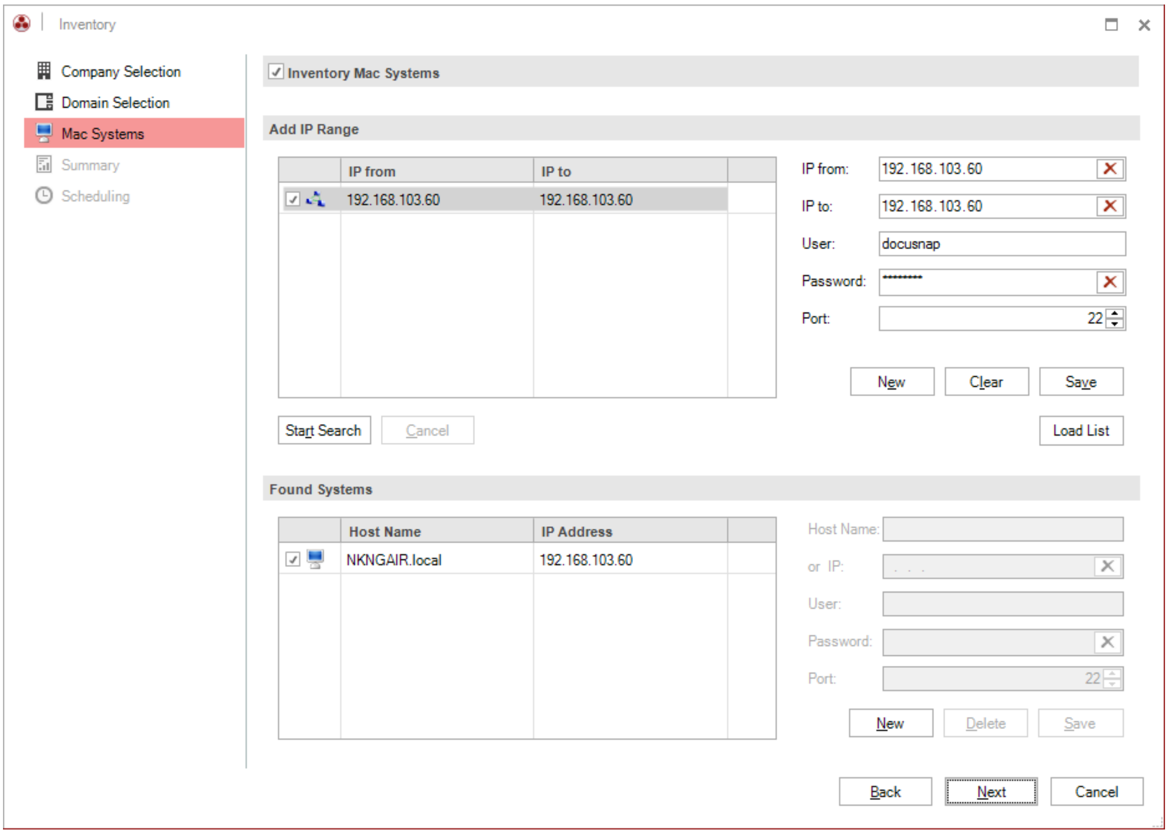
In addition to scanning entire IP ranges for systems, you can also specify a single system. In the *Found Systems* group, click the *New* button and then enter either a system name or an IP address as well as the *User* name and the *Password* for the system(s) to be scanned subsequently.

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

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

3.1.6 Mac Systems

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



There are two ways to identify the available Mac systems:

Entering an IP Segment Manually

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

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

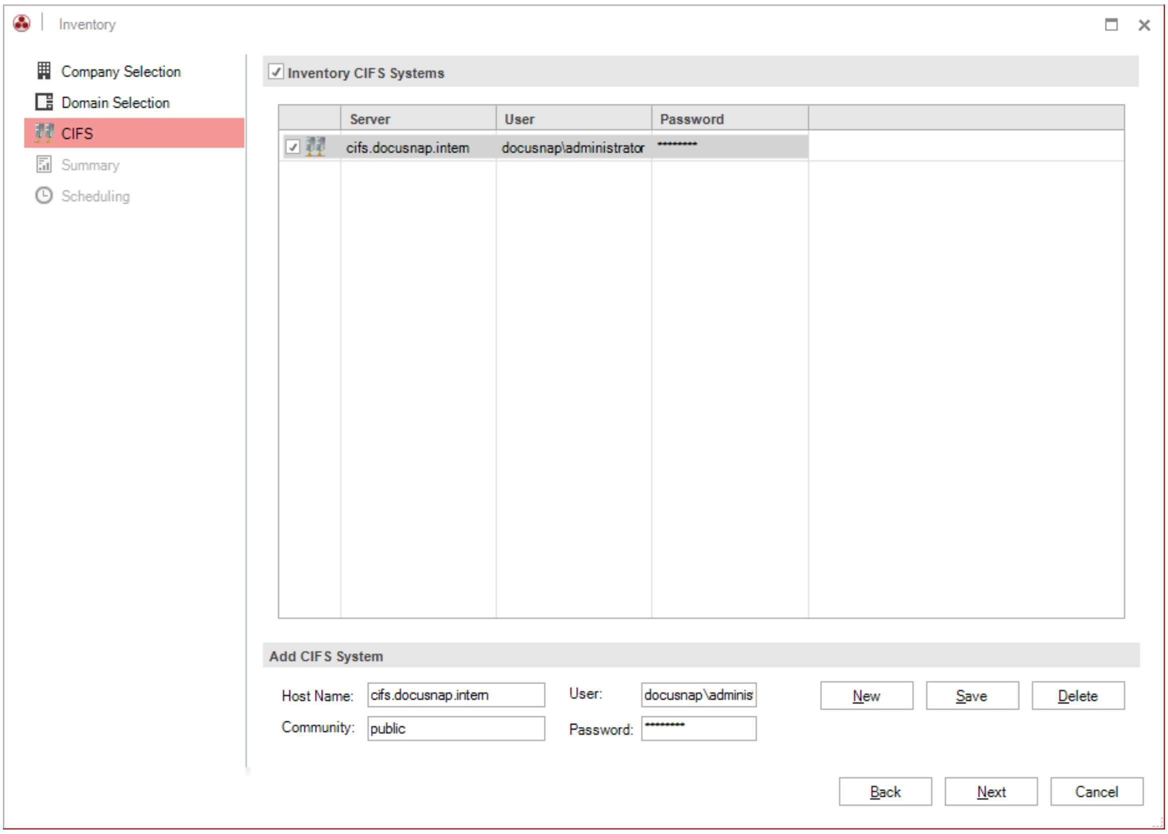
Entering Individual Computers Manually

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

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

3.1.7 CIFS

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



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

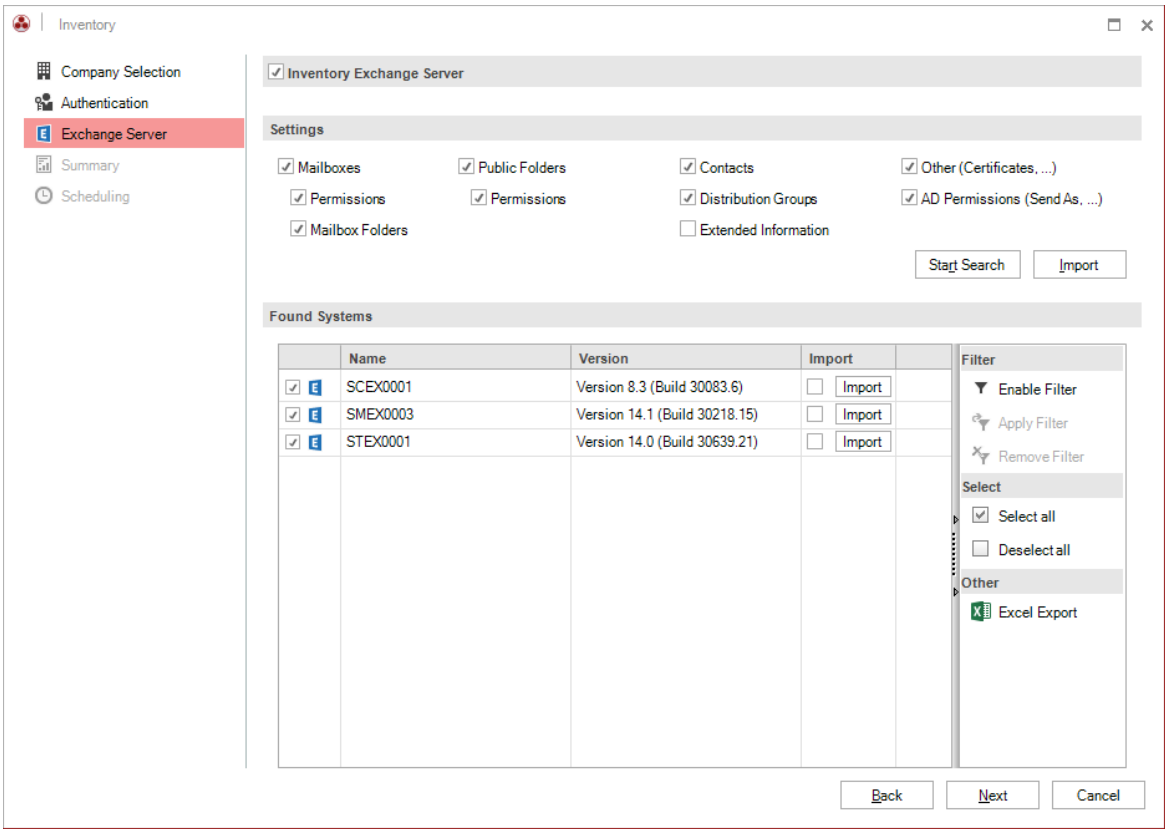
Identify the CIFS system to be scanned by completing the *Host Name*, *User*, *Password* and *Community* fields. After the desired systems have been added to the table of CIFS systems, you can use the checkbox next to each system to specify whether it is to be included in the inventory scan or not.

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

3.1.8 Exchange Server

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

For inventorying Exchange servers, you can select what information should be retrieved as well.



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

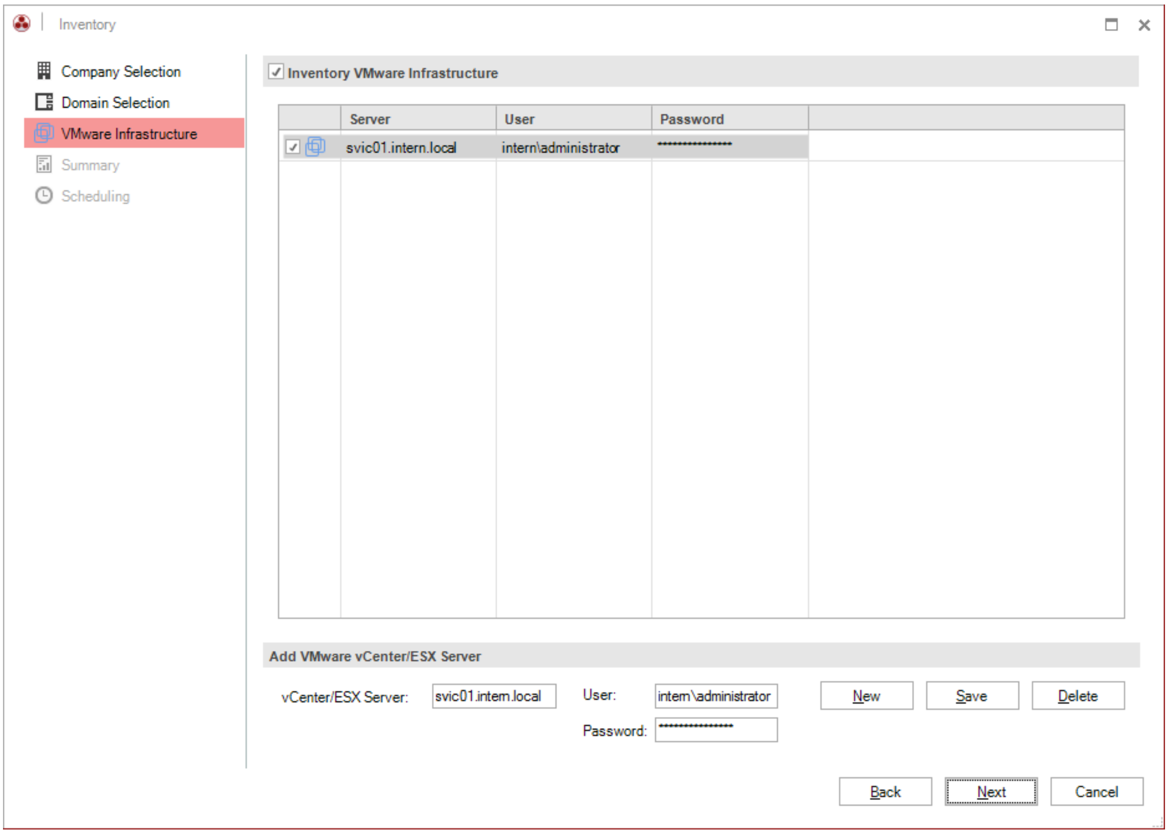
Use the DocusnapExchange.exe script to retrieve information about the mailboxes, public folders, and permissions for a particular Exchange server and to collect them in a file. This data can be imported into Docusnap during the Exchange server inventory process. You can either select a folder with files for multiple Exchange Server or add a file for each server.

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.

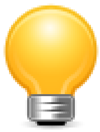
If you previously had clicked the *Start Search* button to list all existing servers, you can now select the systems for which you want to import the data. Click the Import button to select the file that belongs to the respective server. The data for this server will be imported from the file. If for a server, the respective checkbox is selected, but no import file is selected, the data for this server will be retrieved by the inventory process.

3.1.9 VMware Infrastructure

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



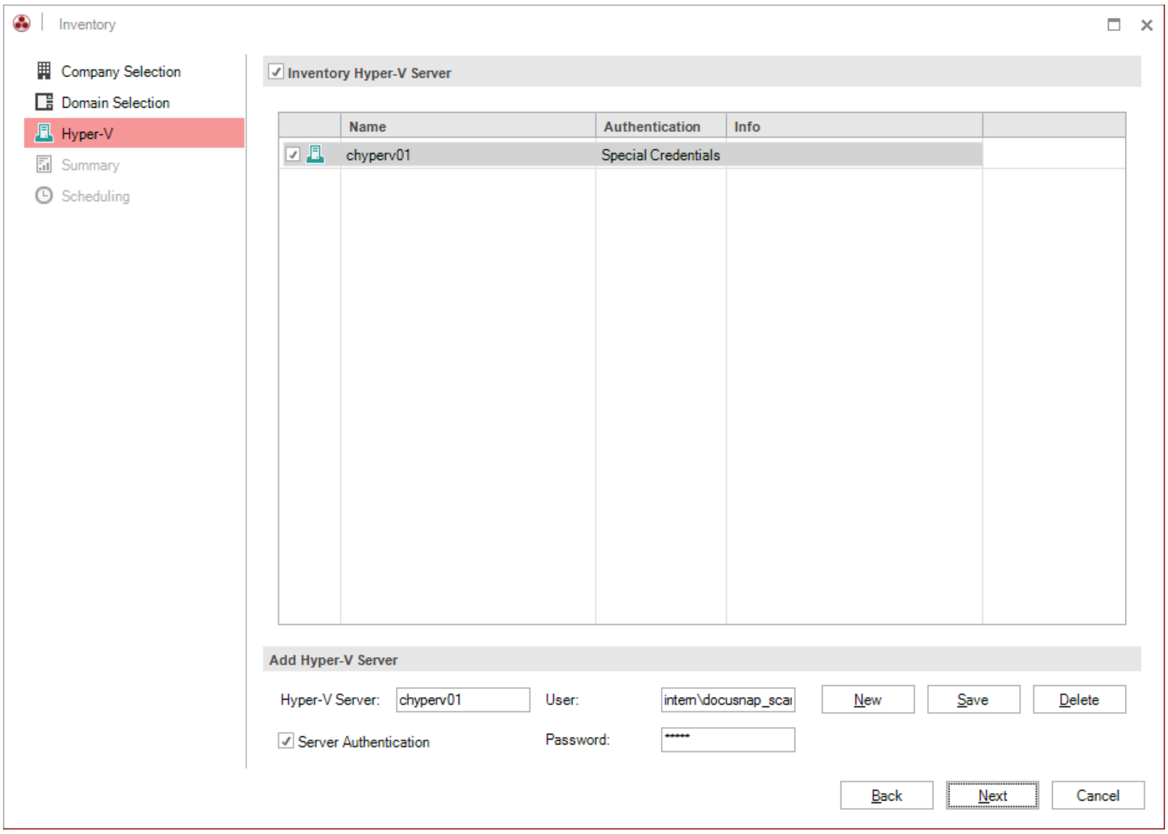
Click the *New* button in the *Add VMware vCenter/ESX Server* group to specify the desired VMware VCenter server, VMware server, VMware ESXi or VMware vSphere. In the *vCenter/ESX Server* field, you can specify the name or the IP address.



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.

3.1.10 Hyper-V

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

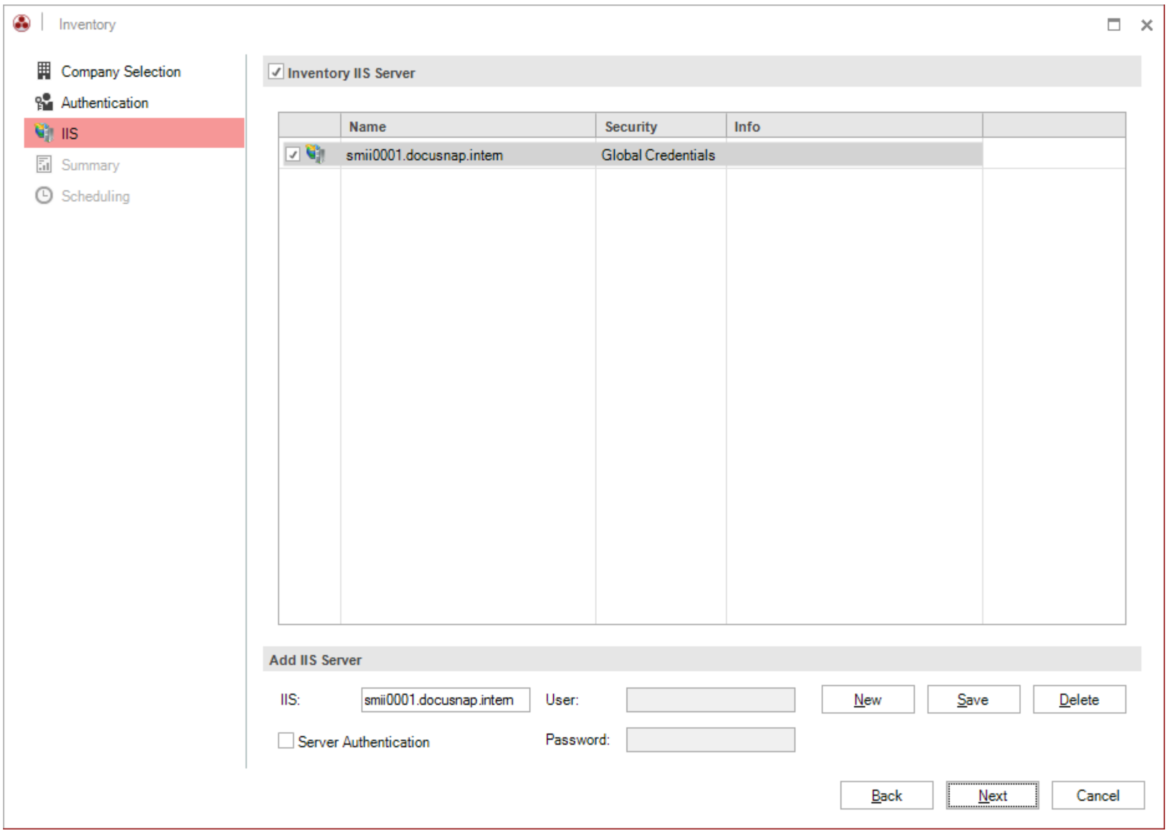


To inventory the desired Hyper-V servers, click the *New* button and specify the name of the respective system. You can also enter alternative credentials. After you have saved your entry, Docusnap will check whether this system belongs to the domain you specified. If yes, the server will be added to 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.

If the specified server name is a cluster Hyper-V, the Docusnap Version 6.3 also inventories the information of the cluster, including all hosts in the cluster. If only the name of a Hyper-V server is entered, then just the data of this server is inventoried.

3.1.11 Internet Information Service

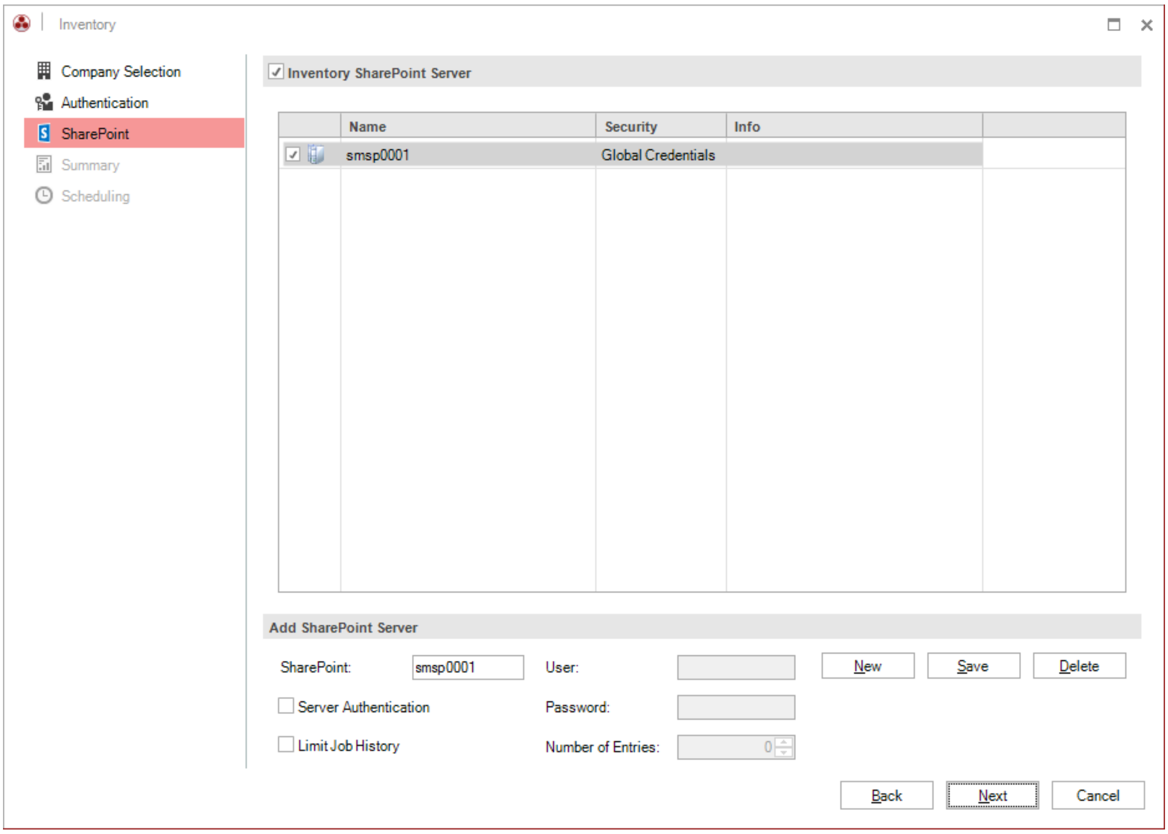
To start the wizard for inventorying Internet Information Service (IIS) systems, click the *IIS* button. After you have selected a company and a domain (see: Basic Steps) the *IIS* step is displayed.



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.

3.1.12 SharePoint

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



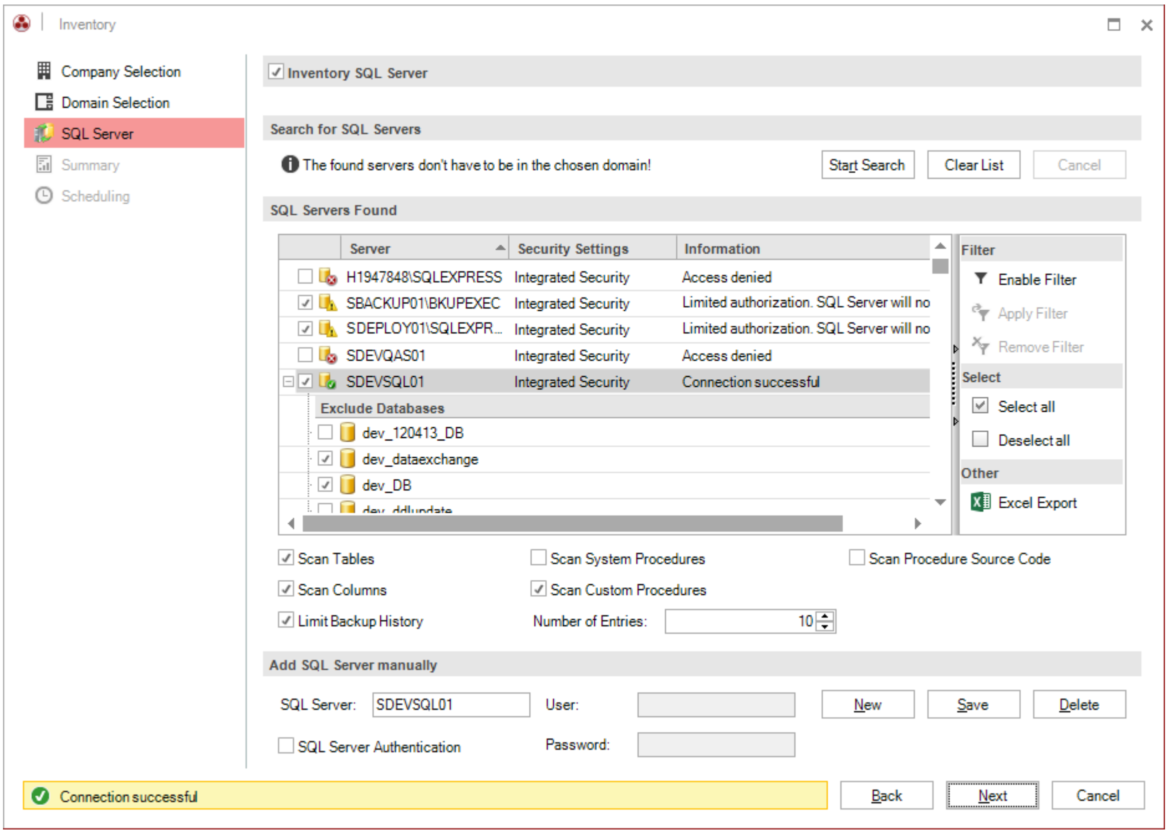
There are two ways to scan SharePoint servers: Either you use global credentials for login. In this case, only the name of the SharePoint server is required for the scanning process. Or you log in using specific credentials. For this purpose, you need to enable the *Server Authentication* checkbox. This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

3.1.13 SQL Server

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



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

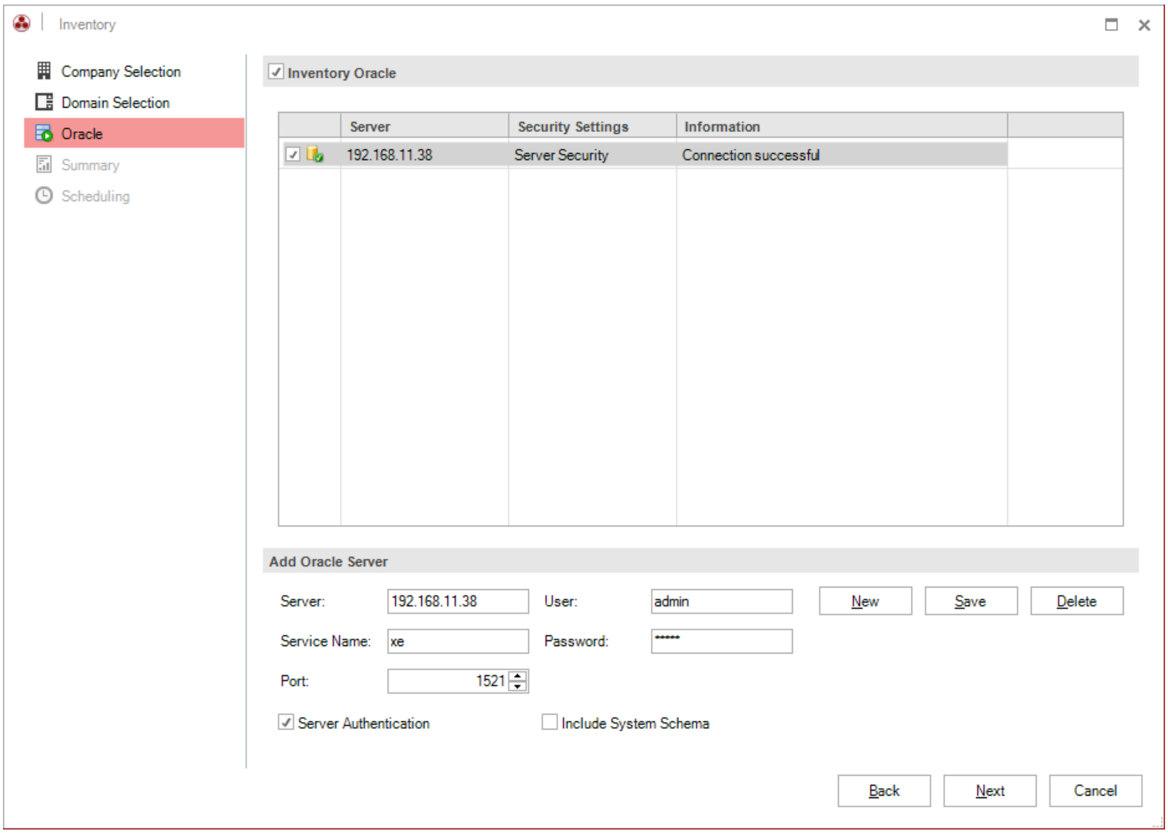
authentication data manually.

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

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.

3.1.14 Oracle

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



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

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

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

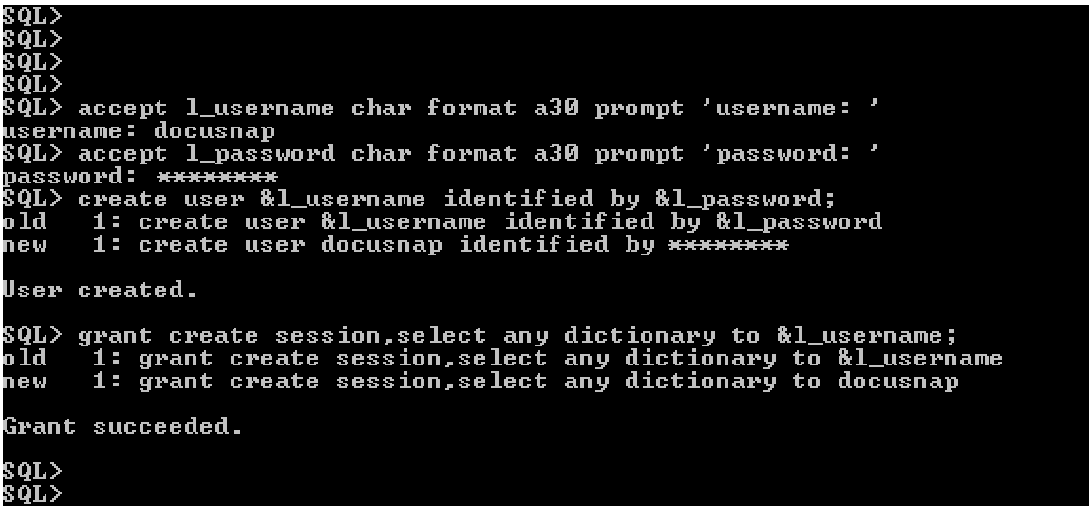
After adding the desired systems to the *List of Servers* overview, you can use the checkbox next to each system to specify whether it is to be included in the inventory scan or not. The *Next* button will only be enabled once you have specified an *Oracle* server. Then, you can continue with the inventory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

Script for creating a user for inventory

To inventory an Oracle databases an Oracle user with "create session" and "select any dictionary" rights is required. With the following script a user can be created who can read the data dictionary, but has no access to the user data of the database. This script must be run against the Oracle database you want to inventory, use e.g. SQL*Plus or SQL Developer. This user can then be used in Docusnap Wizard for Oracle Inventory.

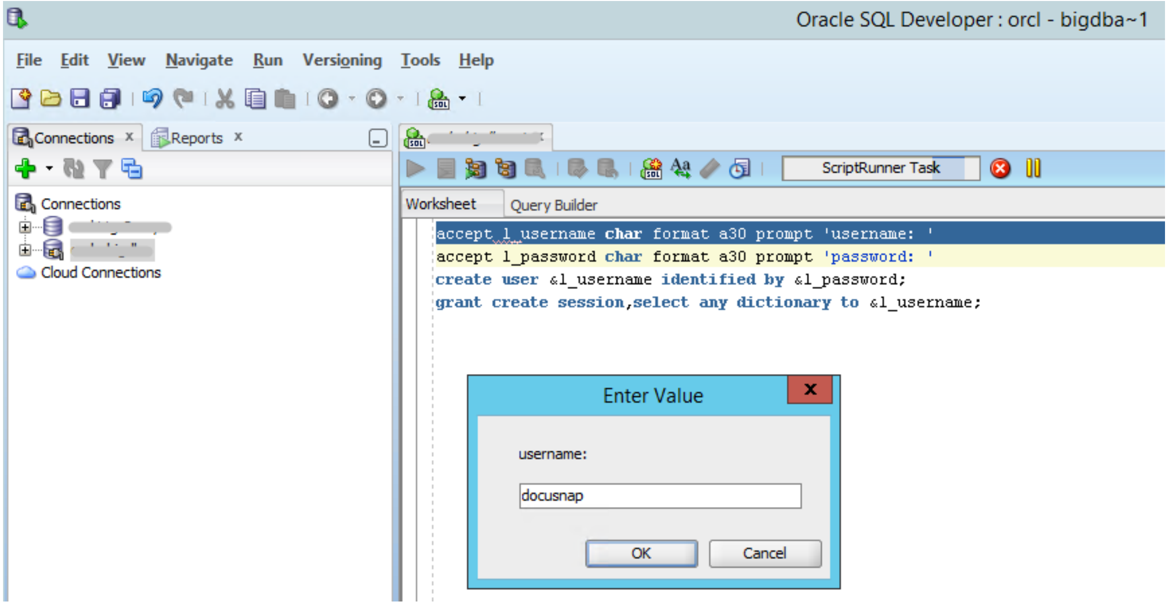
```
accept l_username char format a30 prompt 'username: '
accept l_password char format a30 prompt 'password: '
create user &l_username identified by &l_password;
grant create session,select any dictionary to &l_username;
```

SQL*Plus



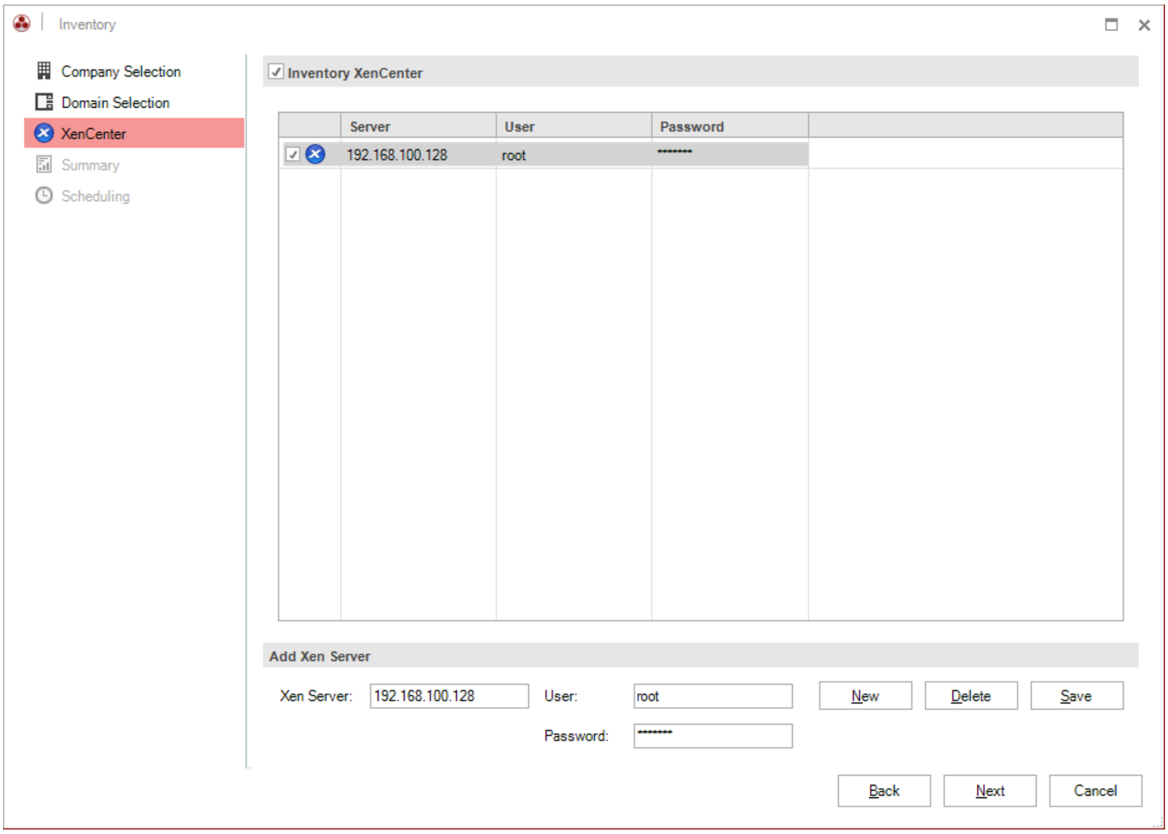
```
SQL>
SQL>
SQL>
SQL>
SQL> accept l_username char format a30 prompt 'username: '
username: docusnap
SQL> accept l_password char format a30 prompt 'password: '
password: *********
SQL> create user &l_username identified by &l_password;
old   1: create user &l_username identified by &l_password
new   1: create user docusnap identified by *********

User created.

SQL> grant create session,select any dictionary to &l_username;
old   1: grant create session,select any dictionary to &l_username
new   1: grant create session,select any dictionary to docusnap

Grant succeeded.

SQL>
SQL>
```

SQL Developer



3.1.15 XenCenter

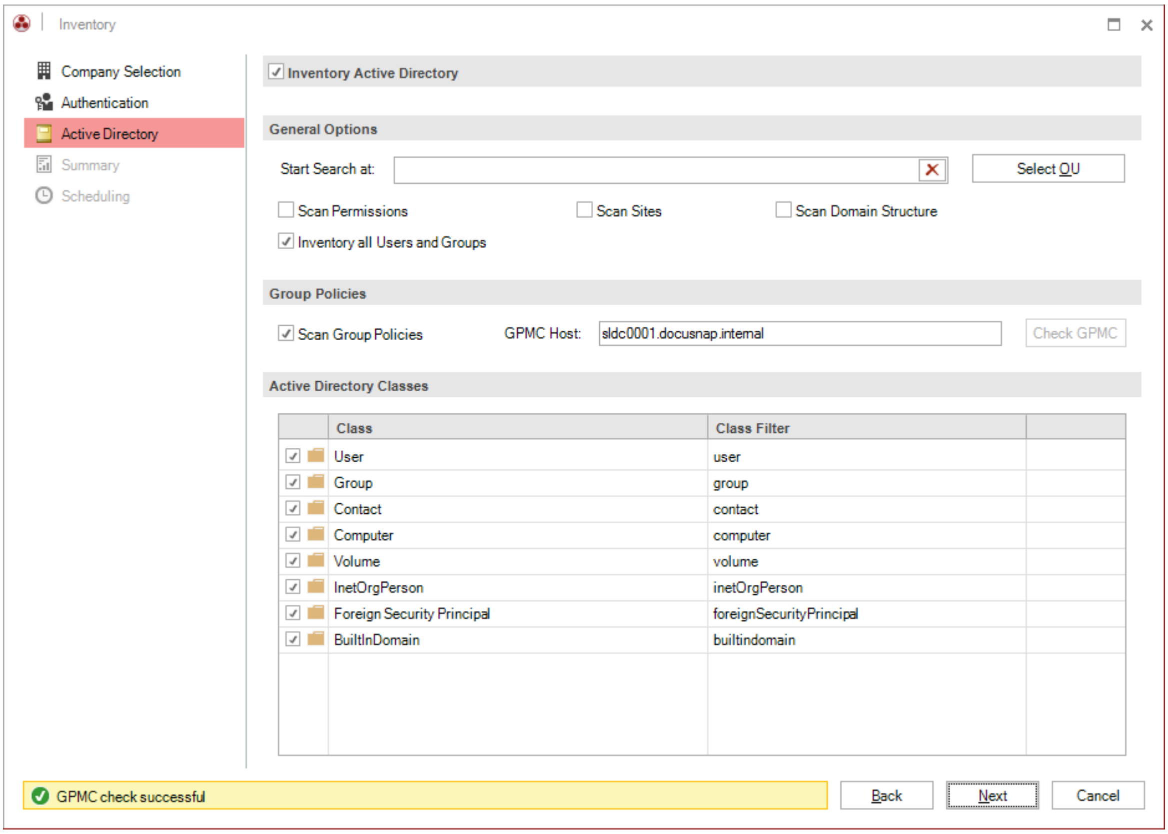
To start the wizard for inventorying Xen servers, click the *XenCenter* button on the *Inventory* ribbon. After you have selected a company and a domain (see: Basic Steps) the *XenCenter* step is displayed.



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.

3.1.16 Active Directory

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



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.

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

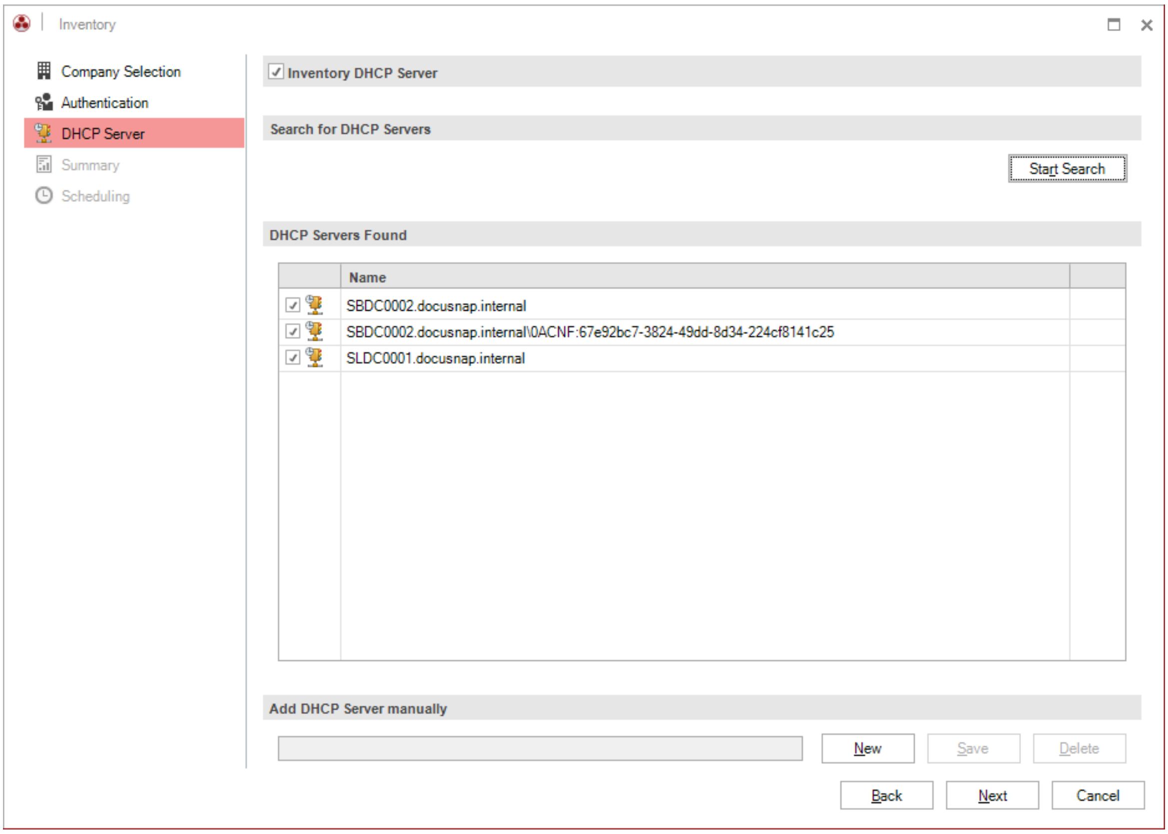
In addition, you can retrieve group policies. They will then be displayed with the corresponding organizational units or domain. To scan the information for group policy objects, you need to specify the computer where the Group Policy Manager

Console (GPMC) is installed. It does not matter whether the GPMC is available on the local system or on a remote system.

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

3.1.17 DHCP Server

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



There are two ways to identify DHCP servers:

Searching for DHCP Servers Automatically

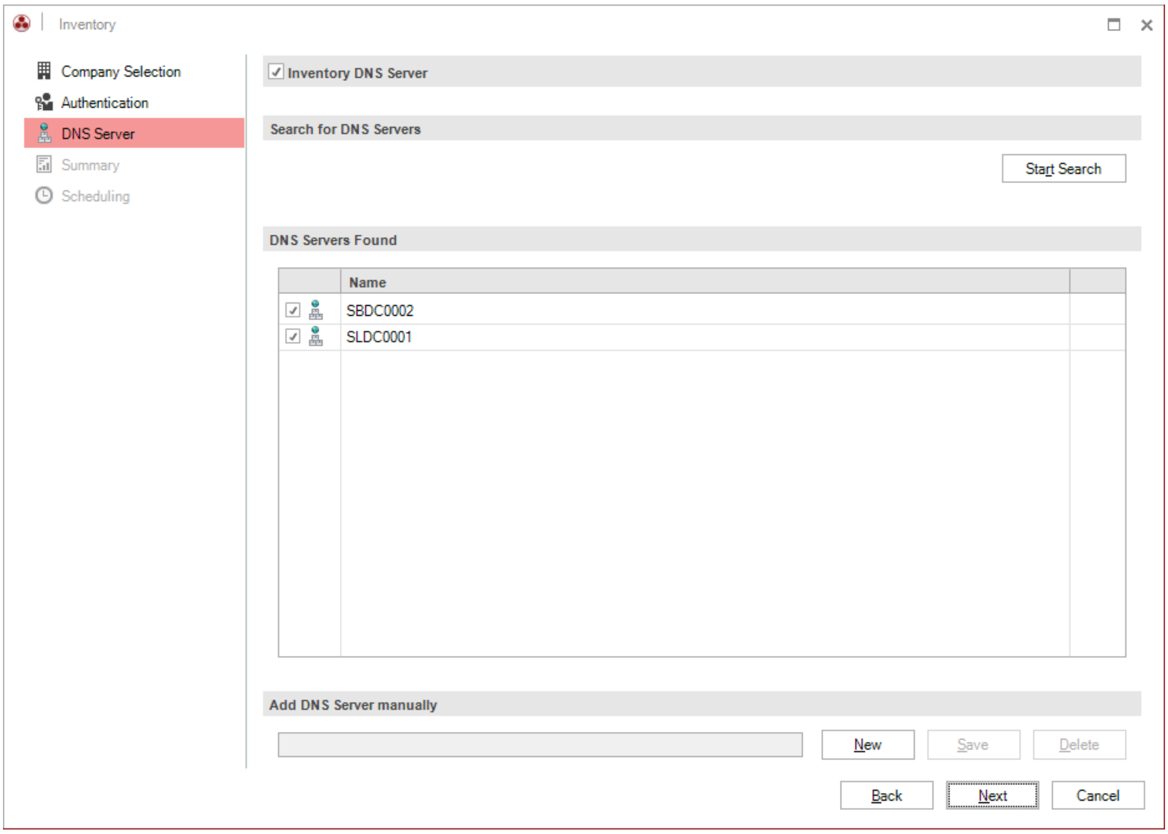
When you click the *Start Search* button, Docusnap will attempt to identify the DHCP servers in your network. If DHCP servers could be determined, they will be listed in the *DHCP Servers Found* list.

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.

3.1.18 DNS Server

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



There are two ways to identify DNS servers:

Searching for DNS Servers Automatically

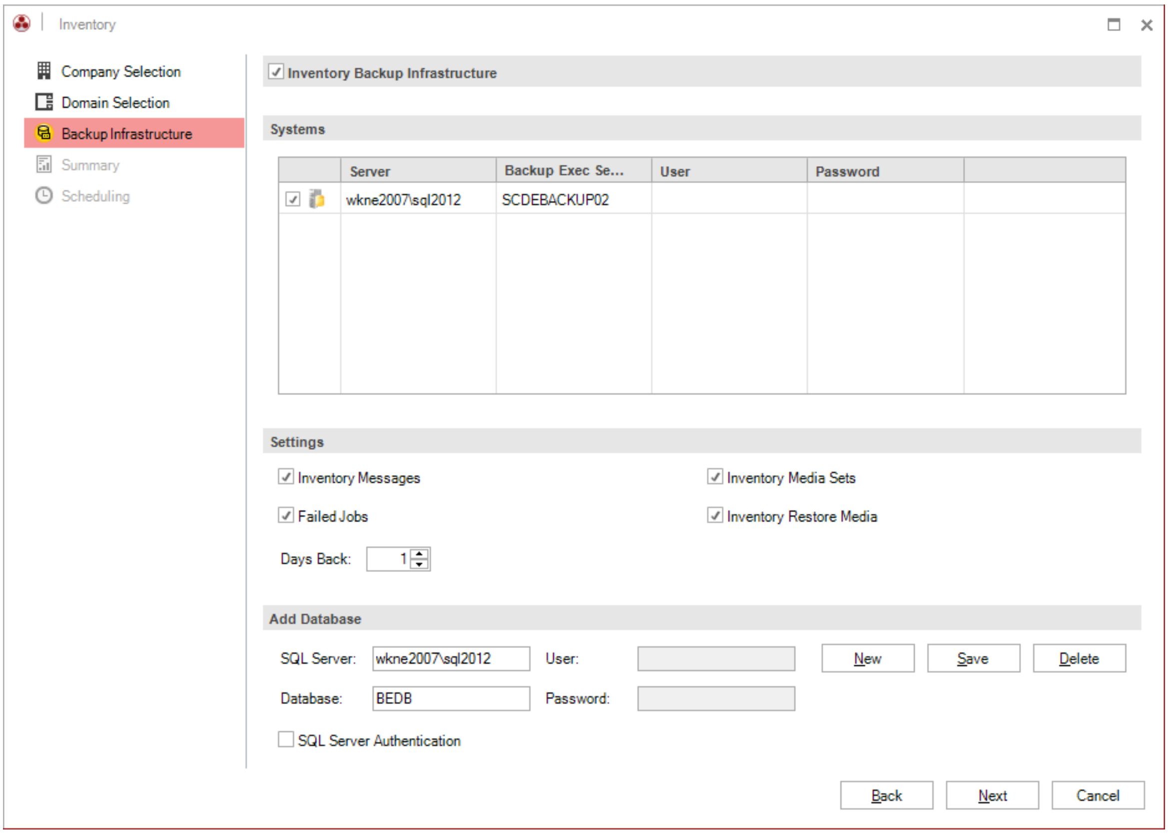
When you click the *Start Search* button, Docusnap will attempt to identify the DNS servers in your network. If DNS servers have been determined, they will be listed in the *DNS Servers Found* list.

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.

3.1.19 Backup Exec

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



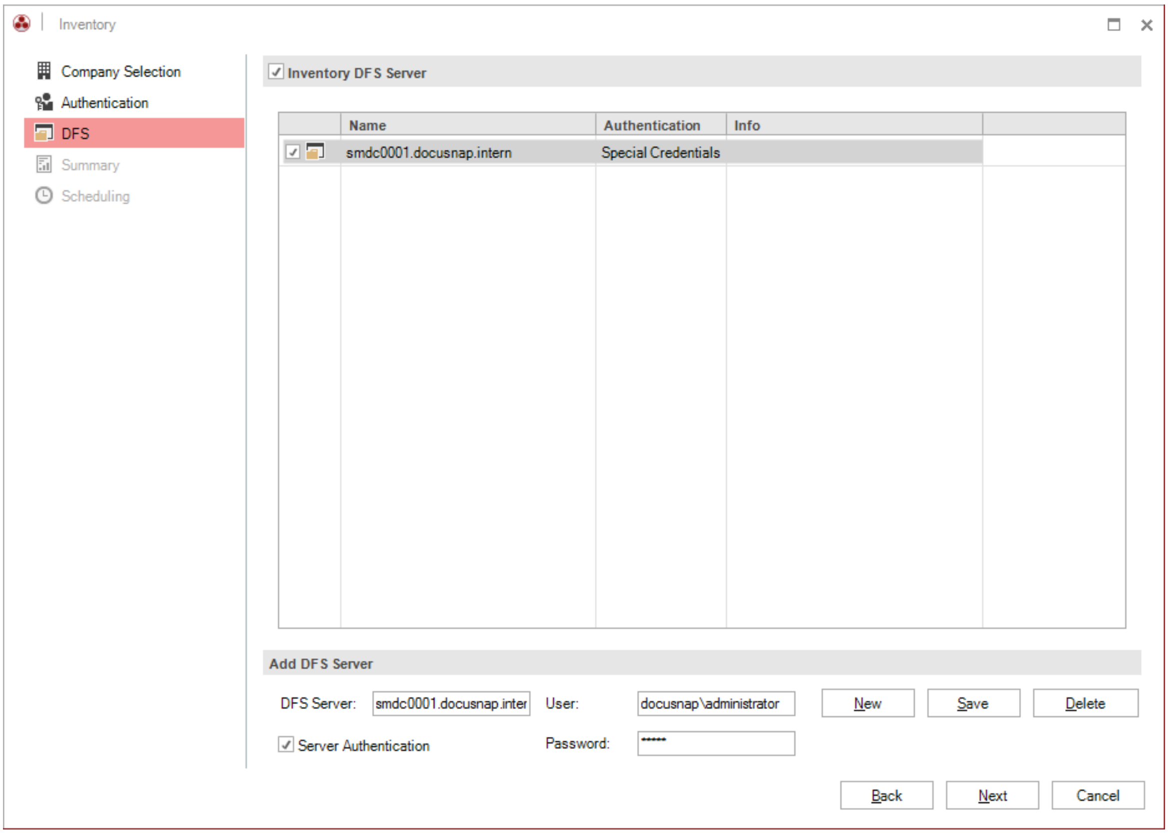
To inventory the *Backup Exec* infrastructure the name of the SQL server where the data of the *Backup Exec* server is located, has to be entered in the *SQL Server* field. By default the name of the database is BEDB. If the database is named differently, then the name has to be entered into the *Database*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

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

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

3.1.20 DFS

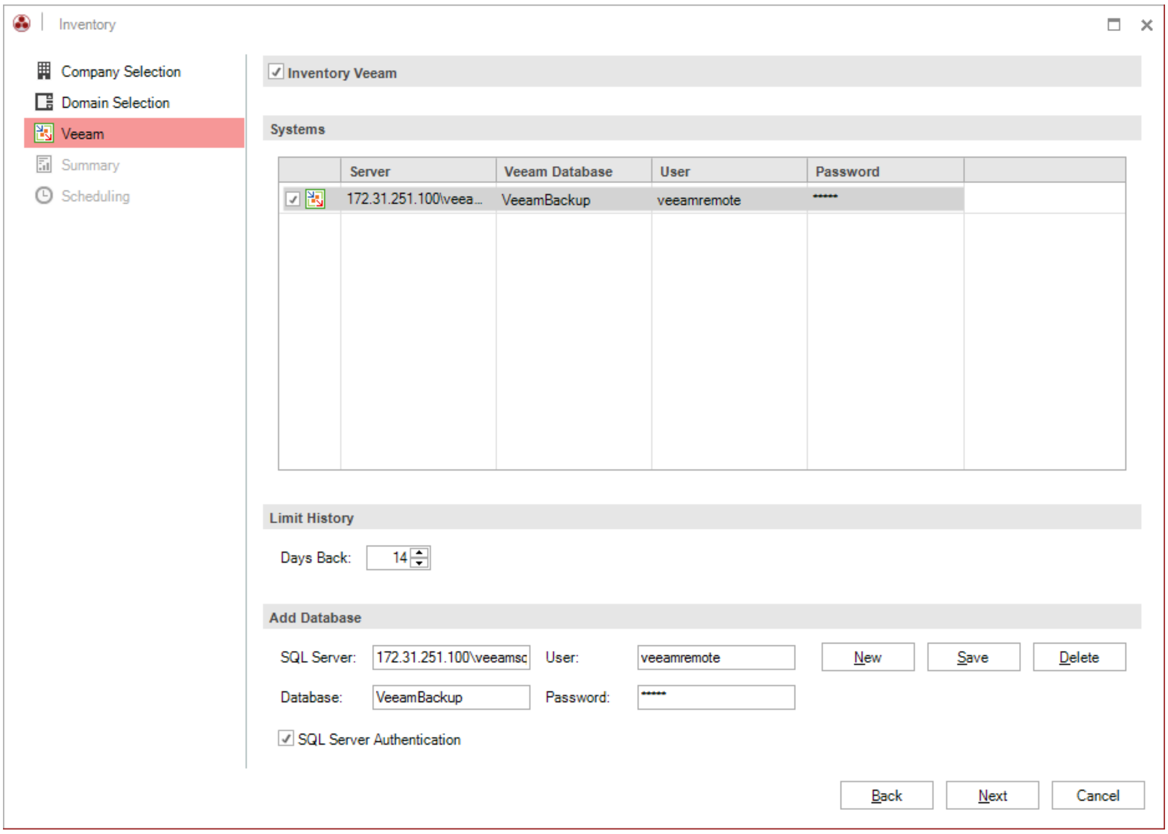
To start the wizard for inventorying Distributed File Systems, click the *DFS* button. After you have selected a company and a domain (see: Basic Steps) the *DFS* step is displayed.



To inventory the desired DFS 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 disabled. After adding the desired systems to the *DFS 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.

3.1.21 Veeam

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



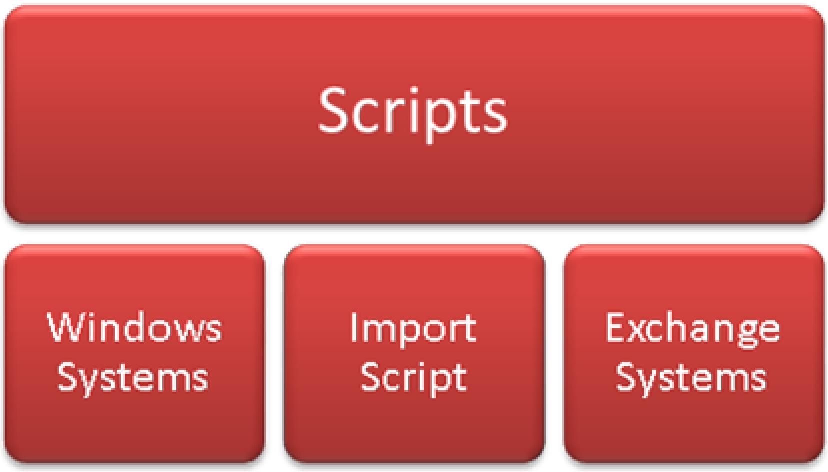
To inventory the *Veeam* infrastructure the name of the SQL server where the data of the *Veeam* server is located, has to be entered in the *SQL Server* field. By default the name of the database is *VeeamBackup*. If the database is named differently, then the name has to be entered into the *Database*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

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

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

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

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.

Linux

Linux devices can be inventoried with a script that is executed on that device. Subsequently, this file can 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.

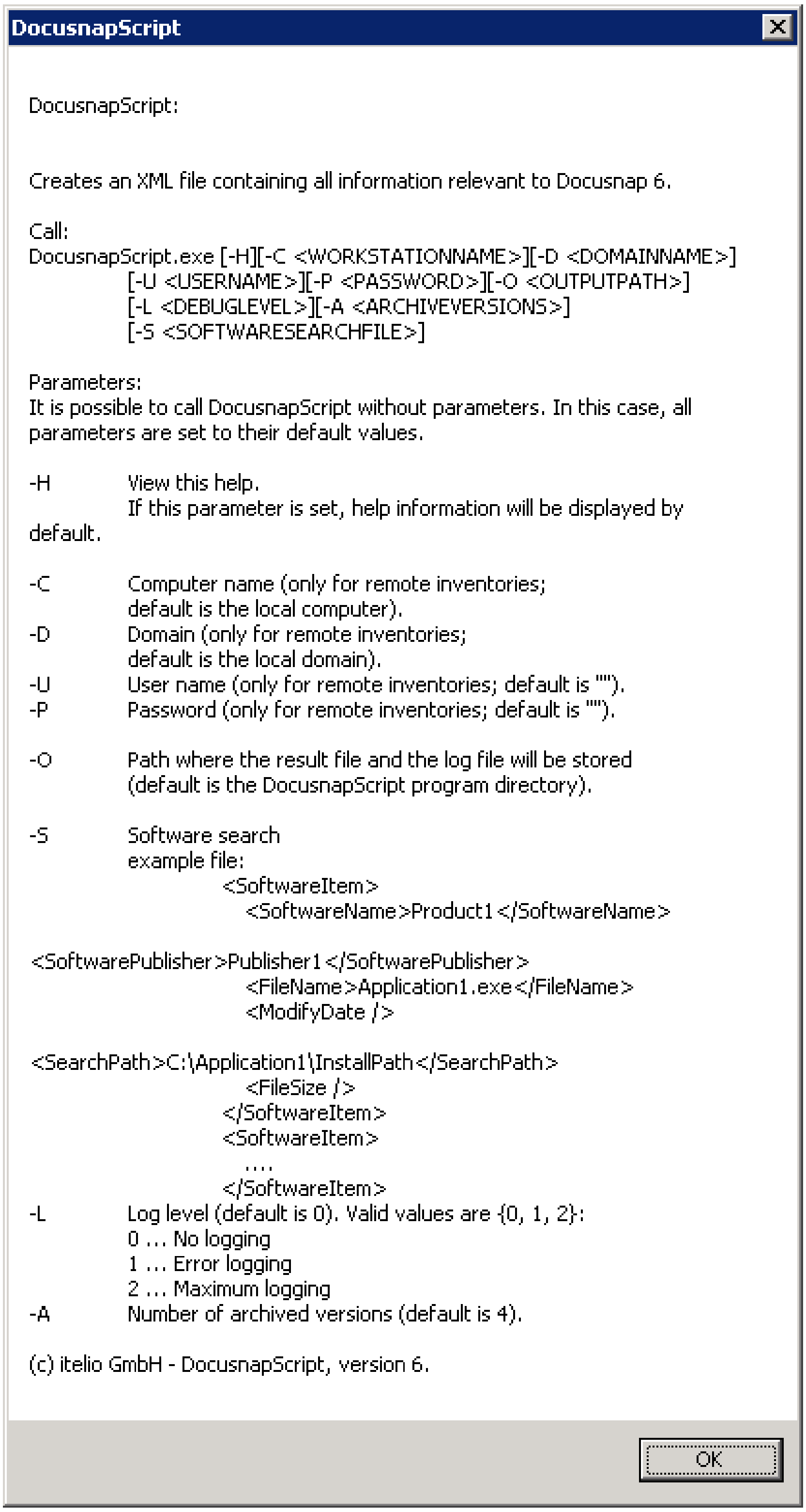
Parameters:

- **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.



```
DocusnapScript

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>][-A <ARCHIVEVERSIONS>]
              [-S <SOFTWARESEARCHFILE>]

Parameters:
It is possible to call DocusnapScript without parameters. In this case, all
parameters are set to their default values.

-H            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).
-D            Domain (only for remote inventories;
              default is the local domain).
-U            User name (only for remote inventories; default is "").
-P            Password (only for remote inventories; default is "").

-O            Path where the result file and the log file will be stored
              (default is the DocusnapScript program directory).

-S            Software search
              example file:
                           <SoftwareItem>
                              <SoftwareName>Product1</SoftwareName>

<SoftwarePublisher>Publisher1</SoftwarePublisher>
                              <FileName>Application1.exe</FileName>
                              <ModifyDate />

<SearchPath>C:\Application1\InstallPath</SearchPath>
                              <FileSize />
                           </SoftwareItem>
                           <SoftwareItem>
                              ....
                           </SoftwareItem>
-L            Log level (default is 0). Valid values are {0, 1, 2}:
              0 ... No logging
              1 ... Error logging
              2 ... Maximum logging
-A            Number of archived versions (default is 4).

(c) itelio GmbH - DocusnapScript, version 6.

OK
```

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.

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 Software Search feature enables you to inventory software products that cannot be scanned through the Windows inventory process. You can include a Software Search command in the Docusnap script. To use the Software Search feature, you need to create an XML software list manually.

The XML file must have the following structure:

```
<SoftwareItem>
<SoftwareName>My New Software 1</SoftwareName>
<SoftwarePublisher>Microsoft</SoftwarePublisher> <!-- optional-->
<SoftwareVersion>1.0 Beta</SoftwareVersion> <!-- optional-->
<FileName>notepad.exe</FileName>
<SearchPath>C:\Windows</SearchPath>
<FileSize>193536</FileSize> <!-- optional byte-->
</SoftwareItem>
```

Make sure to specify the filename correctly or use a wildcard character (?,*).

```
<SoftwareItem>
<SoftwareName>My New Software 1</SoftwareName>
<SoftwarePublisher /> <!-- optional-->
<SoftwareVersion /> <!-- optional-->
<FileName>notepad.exe</FileName>
<SearchPath>C:\Windows</SearchPath>
<FileSize /> <!-- optional byte-->
</SoftwareItem>
```

If one of the optional parameters is not specified, use the notation shown in the example to the left (<SoftwarePublisher />).

If you specify a wrong file size, the desired software will not be scanned!

To use the software list in the DocusnapScript, use the following command:

DocusnapScript.exe -S <path\><filename.xml>

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.

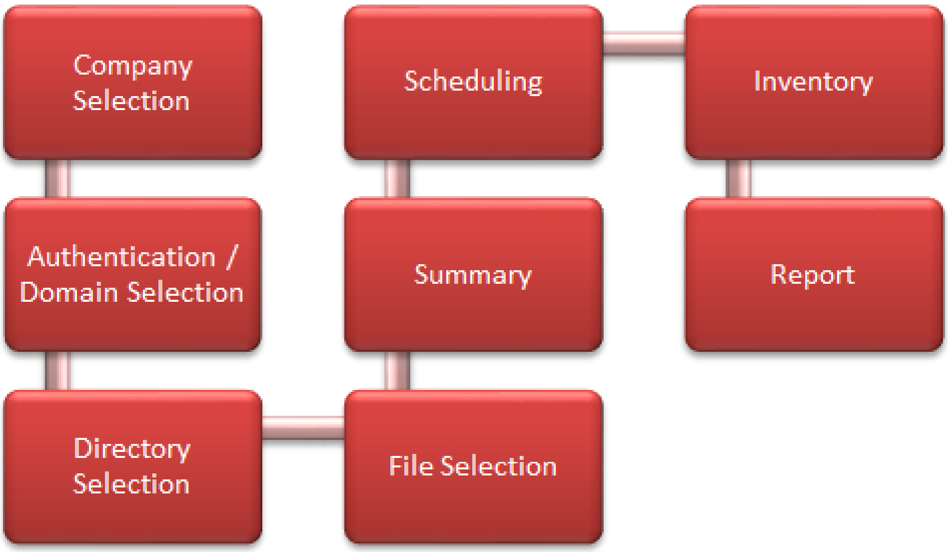
3.2.2 Linux

In addition to the Inventory wizard, Linux devices can also be inventoried by using a script. Depending on whether the target operating system is 32 bit or 64 bit the DSLinux_x32 or the DSLinux_x64 is used. You can find these files in the *Bin* folder of the application directory. When executing the script the parameter *-f* must be specified, so that the file is created. The file is saved with the name *DS_%HostName%_%Date%_%Time%.xml* as *DS_WMLX0007_20151120_141314.xml*.

Subsequently, this file can be imported through the Docusnap Import wizard in Docusnap.

3.2.3 Import Scripts

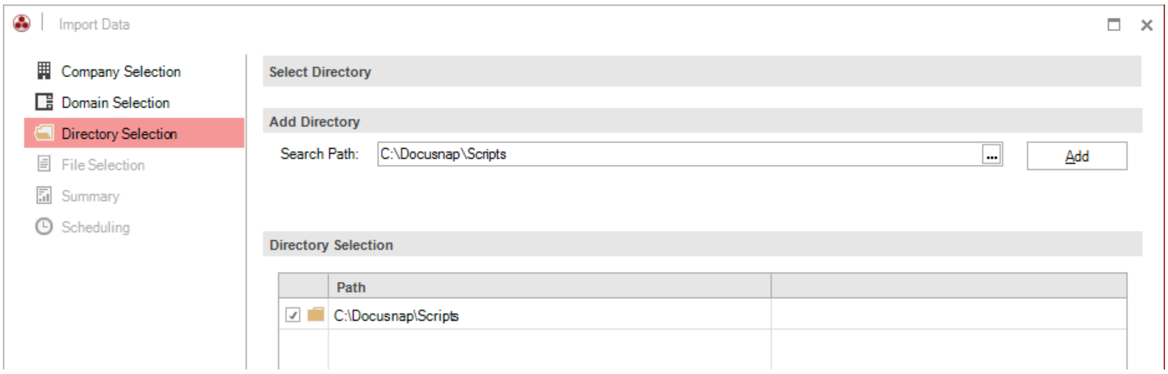
Using the wizard for importing script files, you can import files that have been created by executing the DocusnapScript.exe.



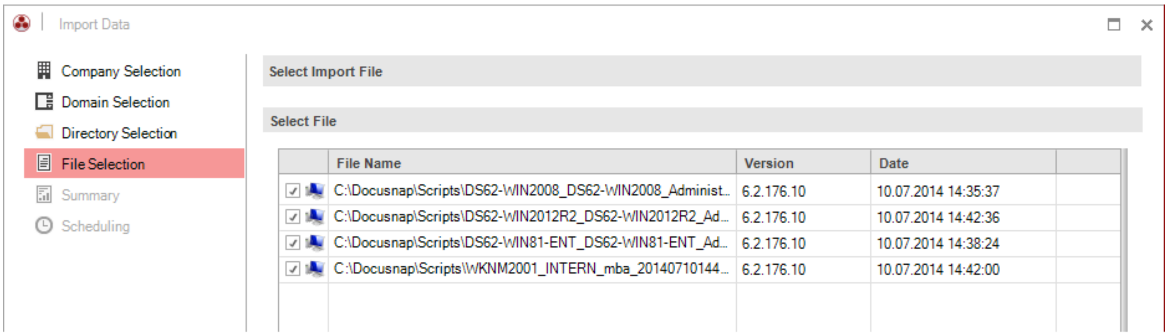
Click the *From Docusnap Script.exe* button on the *Other Sources* Button of the *Inventory* ribbon to open the *Import Data* wizard. The *Directory Selection* step will be displayed after you have selected a company and a domain (see: Basic Steps).

To import xml files, two steps are necessary in the *Import Data* wizard:

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



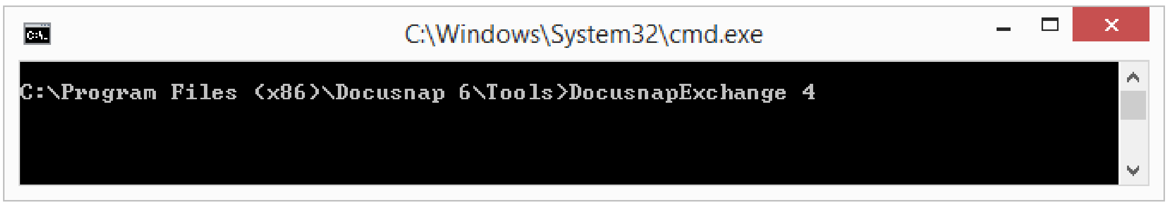
- In the *File Selection* step, select the files to be imported.



3.2.4 Exchange

DocusnapExchange.exe provides three ways to inventory an Exchange server. Always run the file on the very system that you want to scan. During the installation of Docusnap, the *DocusnapExchange.exe* script is stored in the *Tools* folder of the application directory.

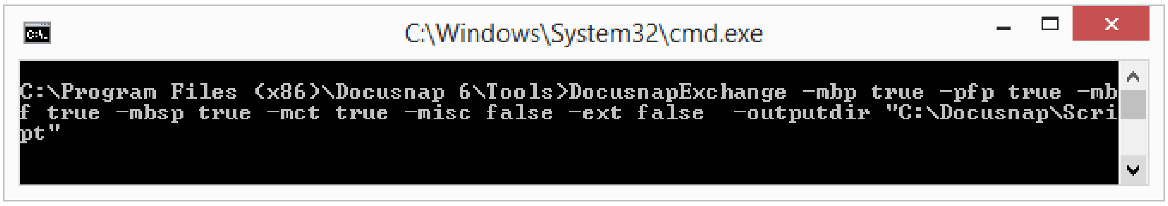
- Local:
  The *DocusnapExchange.exe* script can be executed either by double-clicking its name or entering its name in the command line. When using the command line, you can additionally specify the number of threads to be used. When the inventory is done, an XML file is created in the folder where the *DocusnapExchange.exe* file is located. This XML file contains all retrieved data.



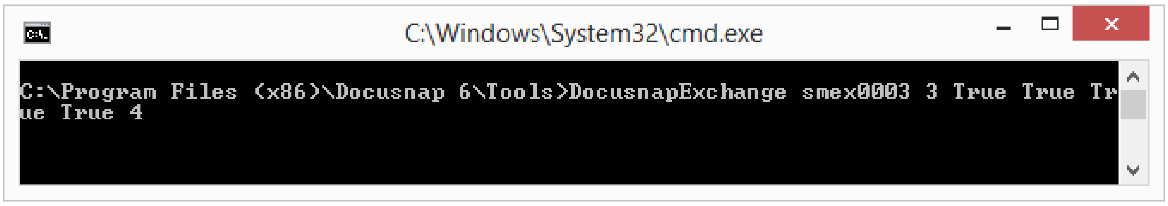
- Default:
  The second option allows you to select the information to be retrieved. To do so, specify 'true' or 'false' for the following arguments. If an argument is not specified, the relevant information is not inventoried.

-mbp = Retrieve permissions for mailboxes
-pfp = Retrieve permissions for public folders
-mbf = Scan mailbox folders
-mbsp = Retrieve special permissions for mailboxes
-mct = Scan contacts
-mics = Retrieve other information (Certificates,...)
-ext = Retrieve extended information

Furthermore some additional information is needed.
-threads = how many threads should be used
-outputdir = in which folder should the files be saved



- Legacy:
  For the last option, you need to additionally specify the server name and the Exchange version as the first and second arguments. This option already existed in previous Docusnap versions and has been retained for users who integrated this option into their processes.
  Argument 1 = Exchange server name
  Argument 2 = Exchange version
  Argument 3 = Retrieve permissions for mailboxes
  Argument 4 = Scan mailbox folders
  Argument 5 = Retrieve permissions for public folders
  Argument 6 = Retrieve special permissions for mailboxes



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.

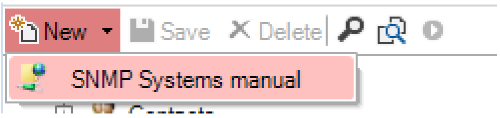
The files created here can then be imported during the Exchange inventory process.

3.3 Manually Create Systems

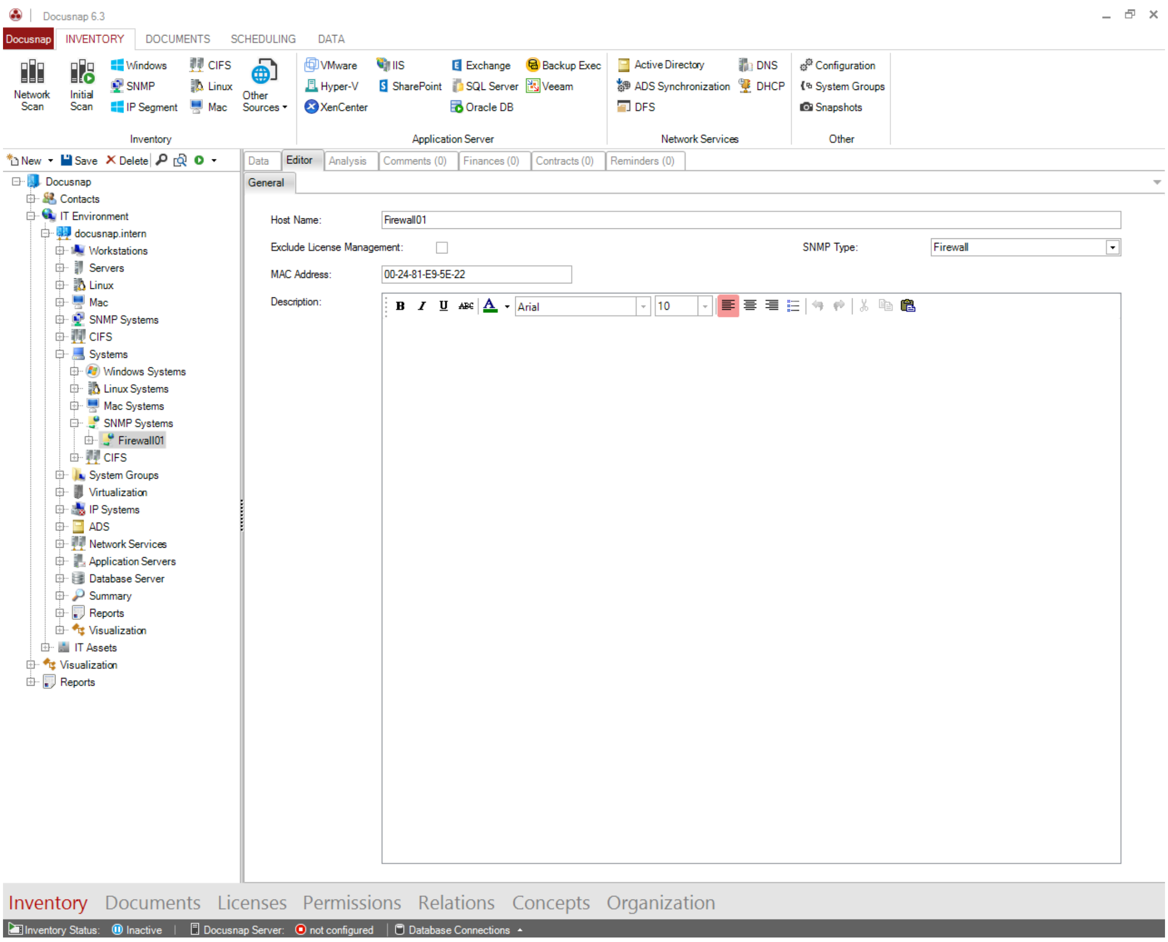
If you wish to include systems that cannot be scanned by the automated inventory process or by the Docusnap Script, you can enter the required information manually. When all necessary data has been entered, the manually created systems are also considered in maps. The manual systems can be integrated into [system groups](). If software has been created for the system, which was also created in the [license management](), these devices are also considered in the license balance. The data sheets of the [documentation]() can also be created for the manual device.

Create Systems

Below the heading *Systems* in the tree *Inventory* headings for *Windows Systems*, *Linux Systems*, *Mac Systems*, *SNMP Systems* and CIFS are displayed to create the respective systems. For example, to create a firewall, select the headline *SNMP Systems* and click the *New* button.

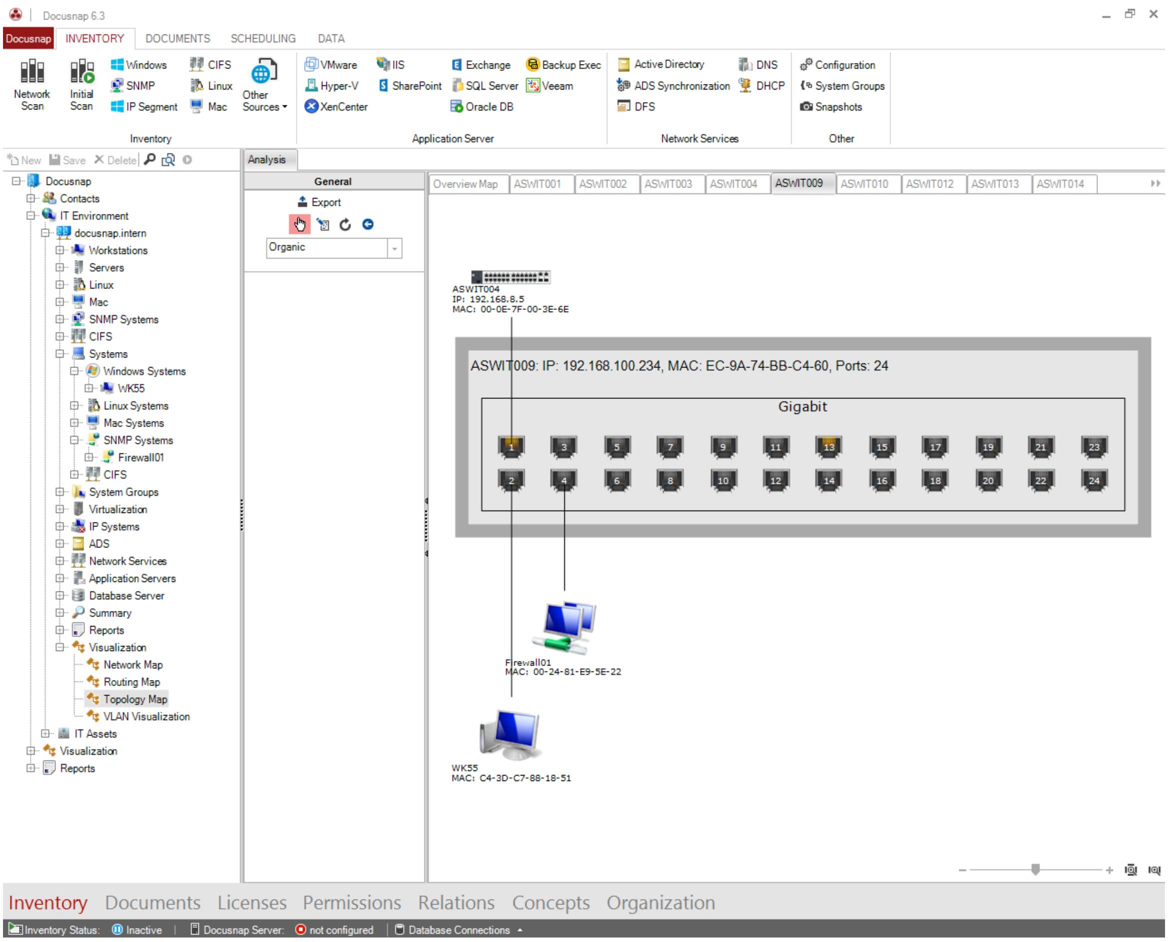


Once you have selected the object type to be created, the associated data entry screen will be displayed. After you have entered all required information, click the *Save* button to save your data. To delete entries that are no longer needed, click the *Delete* button.



In order for the manual systems (Windows, Linux, Mac and CIFS) to be included in the maps, the IP address, subnet mask and MAC addresses of the devices must be specified. For that add a creation date and then general data beneath the system. The network information of the device can then be entered under the heading *Network*. These are needed so the systems are inserted at the correct position in the maps.

SNMP systems need no further information besides the entry directly below the heading. These are considered in the maps, if the MAC address was specified for the device. If the added MAC adresse was not recognized as a learned MAC address, the address can be added to the switch in the Docusnap Management. (See chapter Edit Switch in the configuration manual)



3.4 Configuration

Settings for the execution of the inventory can specified in the *Configuration - Inventory* dialog. Click the *Configuration* button in the *Inventory* ribbon or the *Inventory* button in the Docusnap Menu to open the dialog.

General

Multi-Processing

In order to accelerate tasks such as inventorying Windows systems, Docusnap performs multiple tasks in parallel. By default, 30 concurrent processes can be performed.

The *Timeout in Seconds* field indicates how long Docusnap will wait for the completion of a process during an inventory scan before a timeout occurs. If, for example, a Windows server is scanned over a WAN, it may take longer than 180 seconds until all information has been gathered. If the defined time period is exceeded, Docusnap will terminate the inventory process with a "Timeout" error.

In case of problems during an inventory scan performed over a WAN, reduce the number of concurrent processes and, at the same time, increase the timeout value. Docusnap uses roughly 250 kbits/s for each process.

- *Ping Timeout in Seconds*: This option enables you to increase the ping timeout value for the systems during an inventory process up to 20 seconds.
- *Set Scan Mode*
  Remote or slow networks may cause information retrieval problems as too many concurrent processes are transferring data across the network.
  - If you select the *WAN* mode, Docusnap automatically reduces the number of parallel processes to two and doubles the *Timeout* value.
  - If you select the *LAN* mode, the settings from the *Multi-processing* group will be applied.

Show Features in Wizard

In Docusnap, you can extend the wizards by including additional steps (Export Settings, Software Search, etc.).

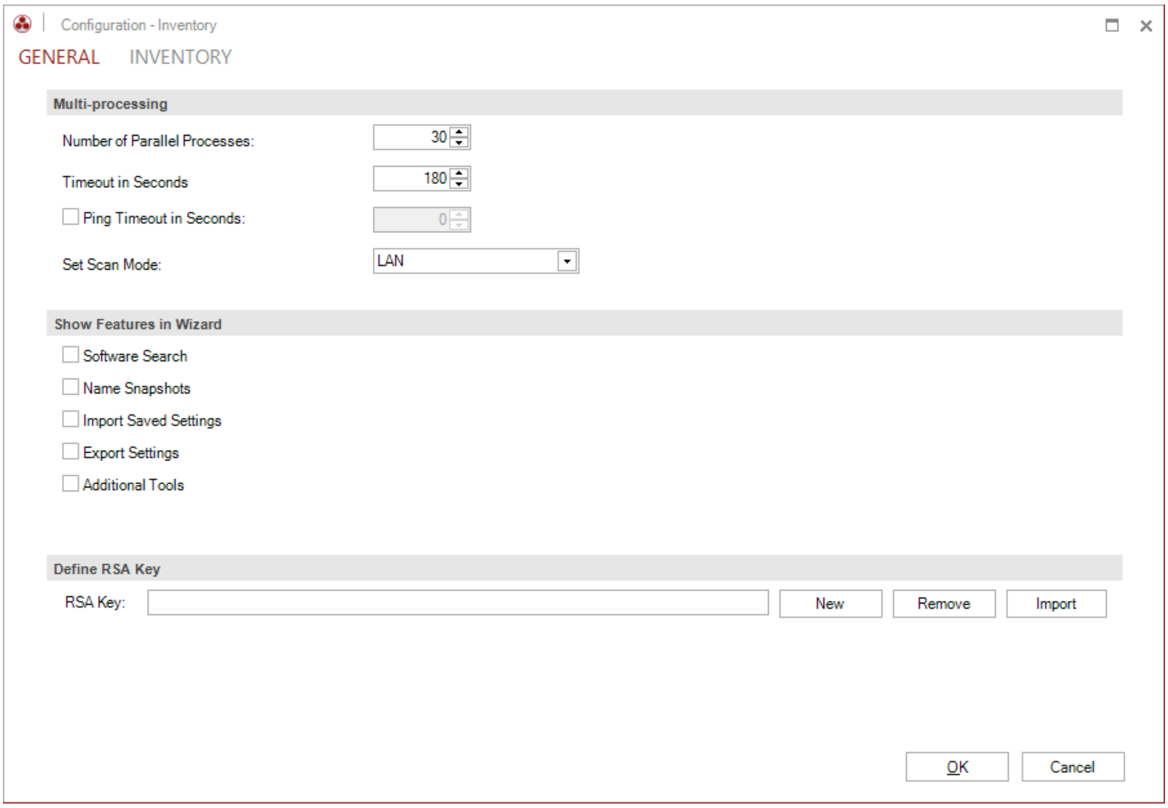
- *Software Search*
  Software Search allows you to find software that cannot be scanned automatically due to a missing registry entry. If you enable the Software Search feature on the Options dialog, the wizards will include the additional Software Search step that you can use to list and select defined software products (see: Software Search).
- *Name Snapshots*
  For each inventory scan, Docusnap creates a snapshot. Snapshots will be automatically named *Inventory from*, with the current timestamp appended to it. After enabling the *Name Snapshot* checkbox in this dialog, you can name the

snapshots as desired.

- *Exporting Settings / Importing Saved Settings*
  You can use the *Import* step in the wizards to load a saved configuration. This option is particularly helpful if you need to perform inventory scans repeatedly and with the same settings. When you select the desired configuration file, the settings saved in this file will be reused. Only the authentication step must be repeated.
  You can save the current configuration of the wizard using the *Export* step and reload it by selecting the *Import* step, as needed. This option is particularly helpful if you need to perform inventory scans repeatedly and with the same settings.
- *Additional Tools*
  Additional tools are used to integrate external utilities into the inventory process for Windows systems. You can add these tools in the Docusnap Management.

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 Linux 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.



Inventory

Windows

- Fallback Method for Windows Inventory
  The fallback method can be activated when the standard way of inventorying systems doesn't work for all Windows systems, for example, if the WMI port is not available. Is this method enabled the standard route is tried first, if that fails, the remote DocusnapScript.exe will be executed on this device to obtain the data of the inventory in this way. The inventory process may take longer to complete because two methods are executed for some devices.

- *Alternative Windows Inventory*
  By default, Windows systems will be inventoried using remote WMI queries. There can be problems during the inventory process, for example because of corrupted WMI provider on the remote system. This can lead to increased memory requirements of Docusnap or block the inventory. By activating the Alternative Method for Windows Inventory parameters are used to configure the DocusnapScript.exe to perform the WMI queries. As a result the inventory, with minor performance impact, will be more stable.

- *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.

- *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.

Software

- *Inventory Hidden Software Components*
  If you enable the *Inventory Hidden Software Components* checkbox, Docusnap will also include invisible software categories in the inventory scan (some software providers define their software such that not all areas are visible).
- *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.

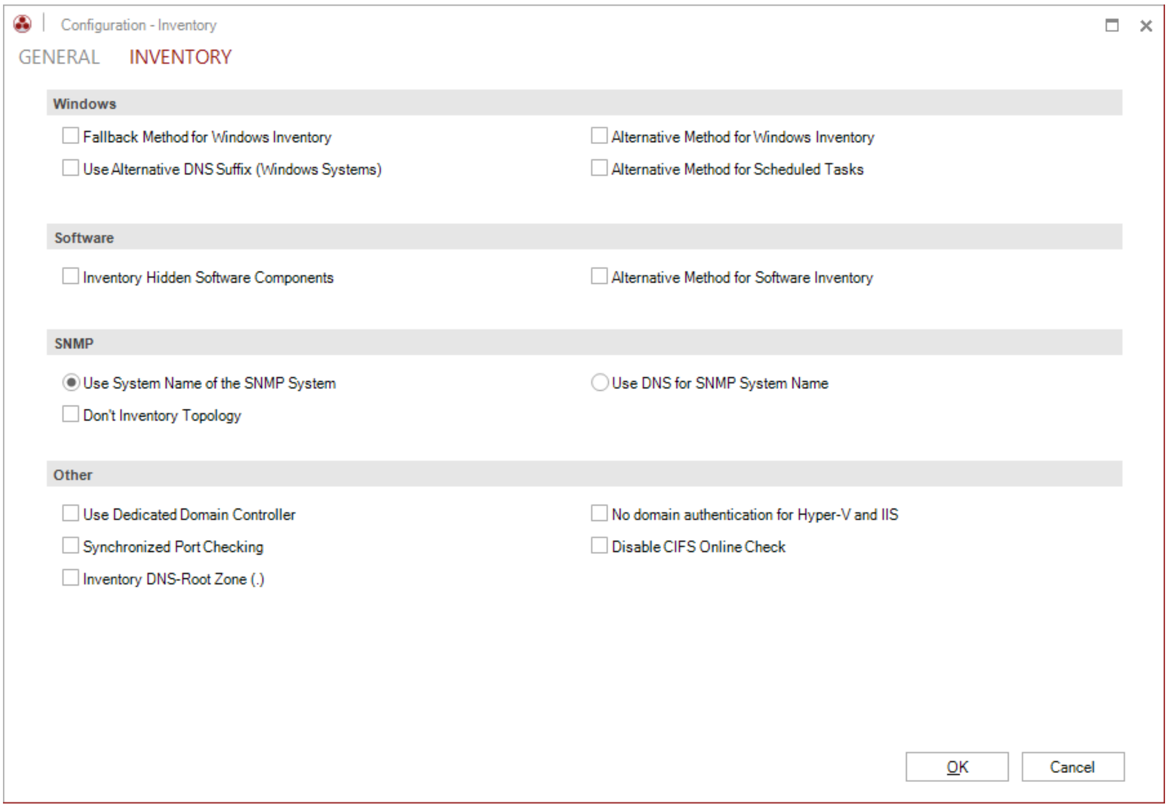
SNMP

- *Using the DNS or Device Name for SNMP Inventory*
  For the SNMP inventory you can use, the device name or the DNS name, if it has been maintained. If the *Use System Name of the SNMP Device* option is selected, then the MAC address is added to the name, if the same device name was used more than once. If the *Use DNS for SNMP System* options is selected and the DNS resolution is not available, the IP address is used as the name.
- *Don't Inventory Topology*
  Enable this checkbox if you do not want the topology of the SNMP devices to be scanned during an SNMP inventory process.

Other

- *Use Dedicated Domain Controller*
  By enabling *Use Dedicated Domain Controller*, you can specify the domain controller to be used for listing the systems found during the inventory scan. For example, if the domain controllers are distributed to multiple sites, this can dramatically reduce the response times when querying the Active Directory. If this option is enabled, you need to specify the name of the dedicated domain controller in the Authentication step of the Inventory wizard.

- *No domain authentication for Hyper-V and IIS*
  In order to scan Hyper-V and IIS devices that are not attached to any domain, you need to disable domain authentication.
- *Synchronized Port Checking*
  A Windows, Linux, Mac, or IP inventory process searches the network for the systems available for scanning. This search runs asynchronously. If systems which exist in the network are not listed, you can alternatively enable the *Synchronized Port Checking* feature in the Options dialog. A synchronous search takes more time.
- *Disable CIFS Online Check*
  To inventory CIFS which do not respond to a ping, you must disable the CIFS online check. This way, the CIFS inventory starts without waiting for a response from CIFS.
- *Inventory DNS Root Zone (.)*
  If you enable the *Inventory DNS Root Zone (.)* checkbox, Docusnap will also determine the (.) root zone entries in the forward lookup zones when inventorying the DNS servers.

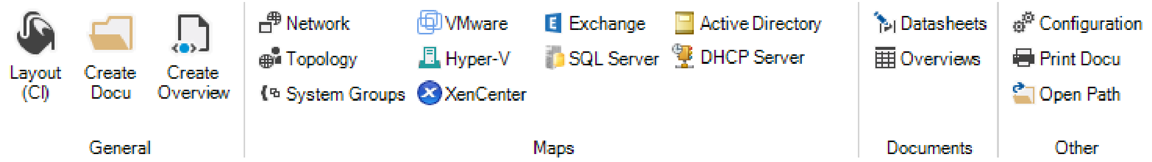


Part IV

4 Documentation

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

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



General

Use the options in this group to set the folder structure and to format the documentation to be created.

Creating Documentation

To create the documentation, various wizards are available.

Documentation View

Docusnap has a specific Documents tree view which allows you to manage the documents you create.

Printing Documentation

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

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.

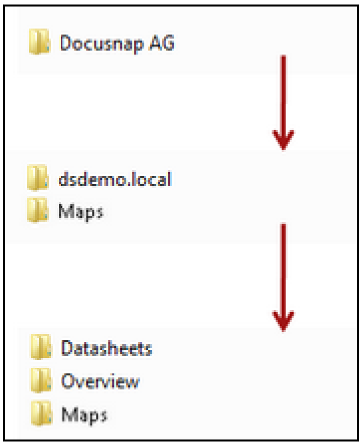
The documentation can be created in English or in German. Even if English is selected as your interface language, it is possible to create documentation in German.

Folder Structure

The folder where the documents will be saved must be selected when getting started with Docusnap. This path is specified on the *General* page of the Configuration - Documentation dialog and can be changed later.

A folder hierarchy for storing the files will be created in the selected directory during the creation of the documents. At the top level, you will find a folder with the name of the company. Under this folder, a folder with the name of the domain will be created. The *Maps* folder contains maps with values from multiple domains.

Below the domain folder, Docusnap creates the *Datasheets*, *Overview* and *Maps* folders, respectively, when the associated documents are generated. Each Datasheet contains information about a single system and will be stored in a subfolder under the Datasheets folder that is named after the corresponding system.



To open the folder which reflects the folder hierarchy for the documents, click the *Open Path* button in the ribbon. The Documents tree view displays each generated map, overview or datasheet at its intended position.

Format Settings

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

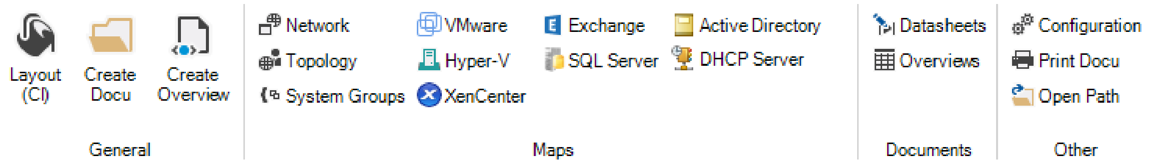
To format maps, go to the *General* page of the Configuration - Documentation dialog. Here, you can specify the font to be used in maps.

Datasheets and overviews are based on reports. For this reason, the format settings for the datasheets and overviews follow the format settings for the reports. To select the design for your reports, use the *Layout (CI)* dialog. If you want to open and edit report in the Report Designer, go to the *Manage Reports* dialog (Docusnap Management).

The report names for datasheets start with "Linux", "Mac", "Server", "SNMP", "Workstation" or "CIFS", followed by "Datasheet" and the reports for the overview have a "OV_" prefix, followed by "Computerlist", "Grouplist", "Softwarelist" and "Userlist". In the *Manage Reports* dialog, you can select whether to display the entries in English or in German.

4.2 Creation of Documentation

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



General

Description of basic wizard steps for creating documentation.

Maps

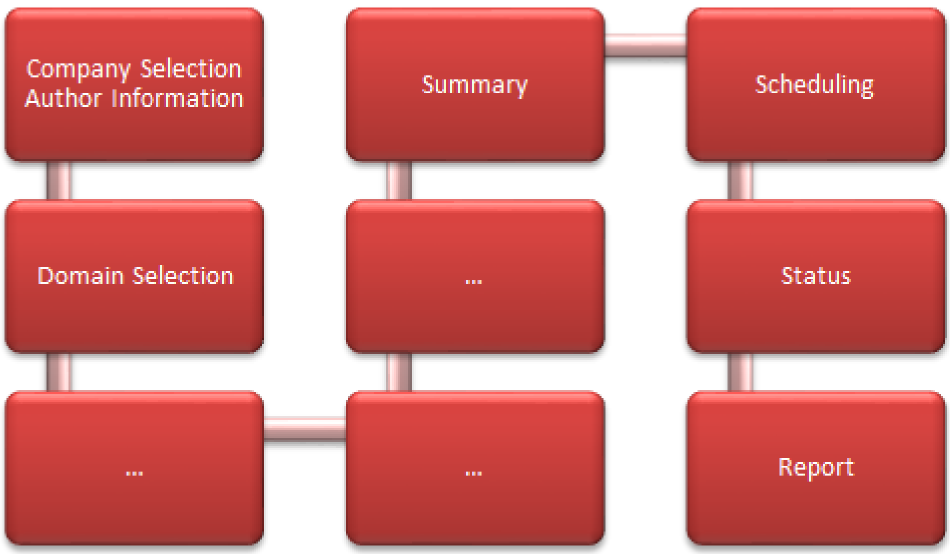
You can create Visio maps of your network, Active Directory, Exchange servers, etc.

Documents

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

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.



Company selection

Domain Selection

Summary

Scheduling

Status

Report

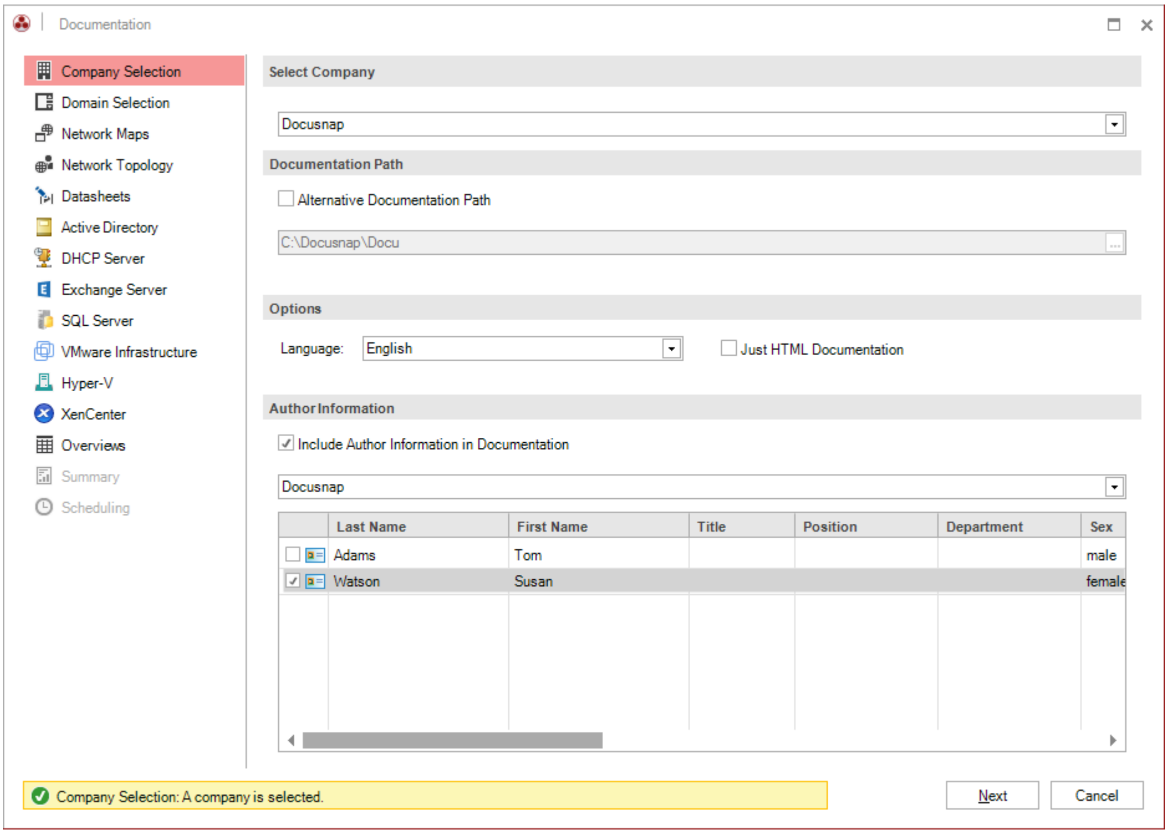
4.2.1.1 Company Selection

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 Configuration dialog. The documents will be stored in this path. The *Alternative Documentation Path* option allows you to select a different path for the current documentation. This path will be used exclusively for the documents created by running this wizard. This setting does not change the documentation path you have set in the Configuration dialog. If you want the documents to be created at a later time by using the Docusnap Server and the documentation path has been changed, make sure that the path exists on the executing system and that the Docusnap Server has the necessary permissions.

The documentation can be created in English or in German. You can even create a German documentation if the Docusnap user interface has been set to English.

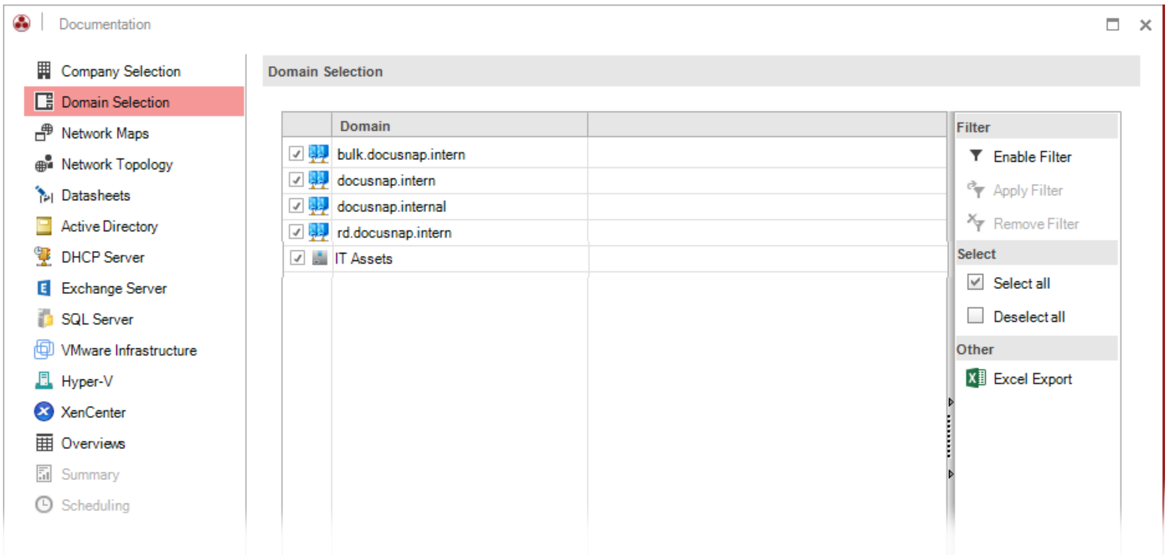
If desired, you can set the names of the company and of the author to appear on the document. The same or a different company can be selected as the authoring company. After you have selected a company, the table displays the names of all persons who were created as contacts in this company. Enabling the checkbox for a contact sets the name of this contact person as author in the document.



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.

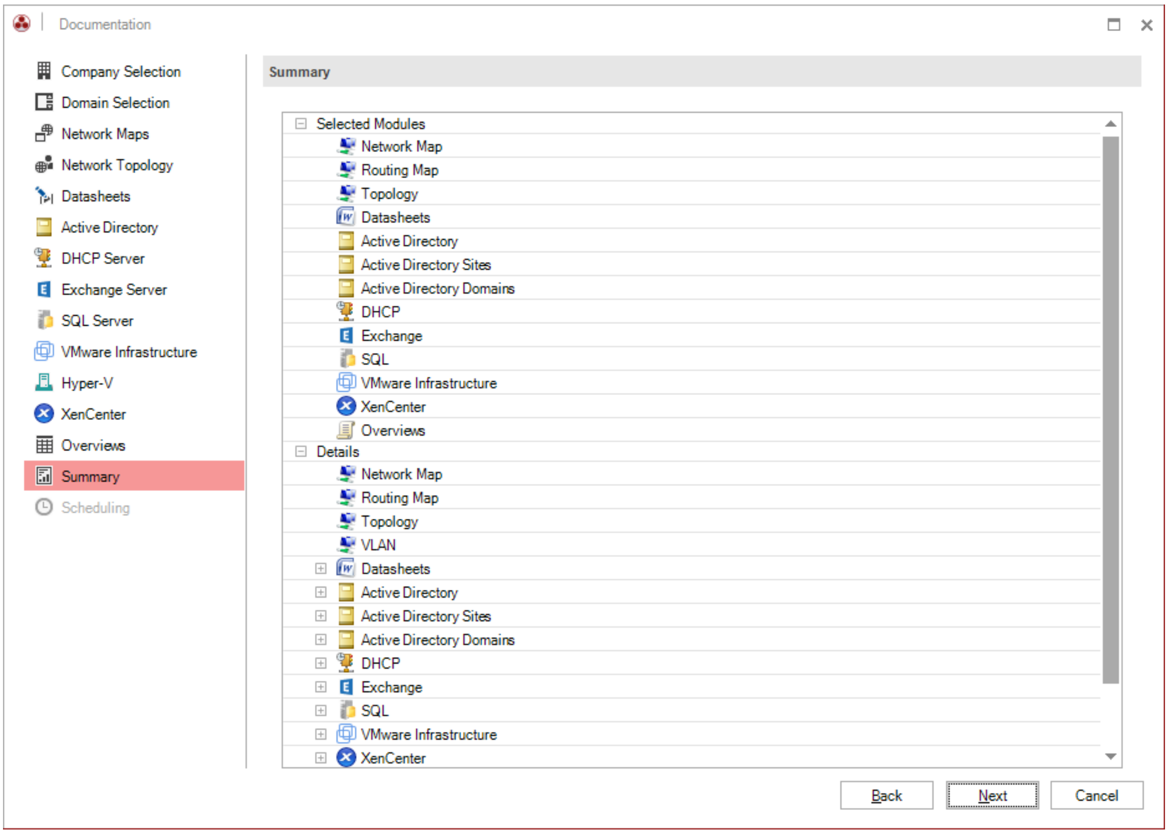
In addition it is defined, whether IT assets should be included in maps.



4.2.1.3 Summary Page

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

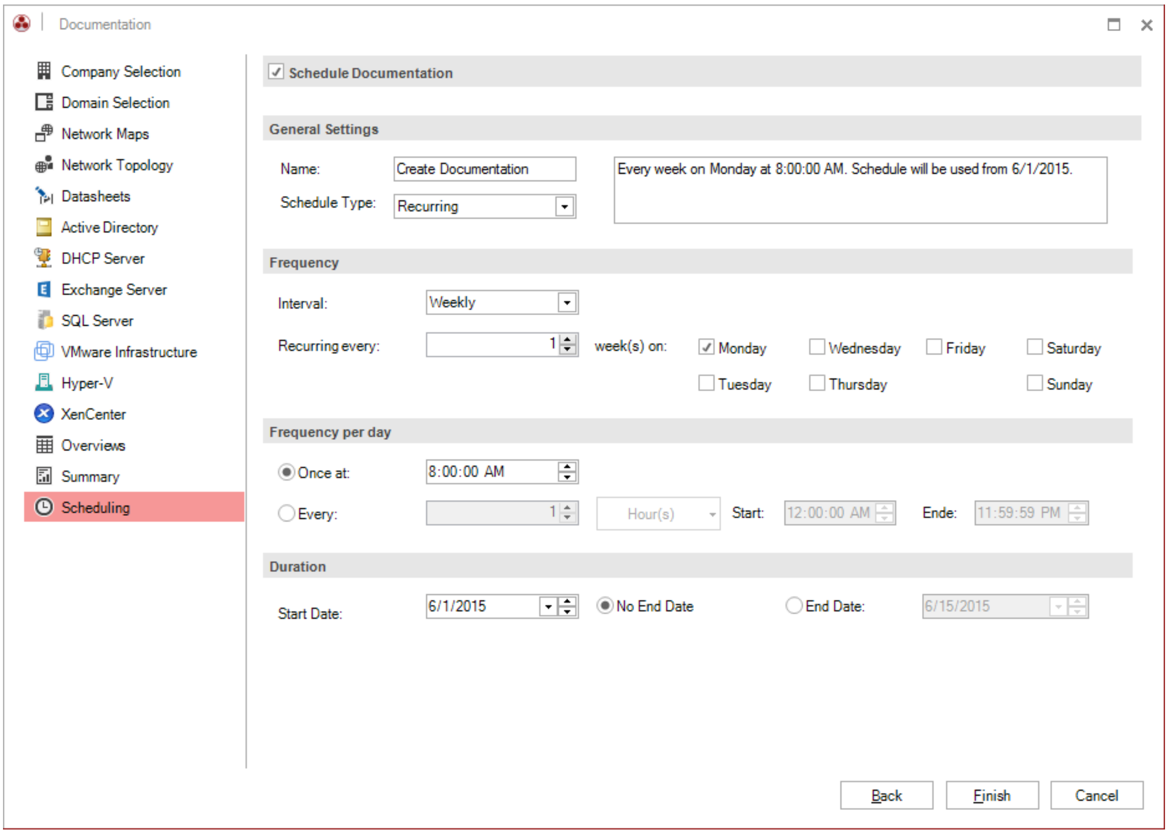
For each step, you can specify to create the respective document or not. For example, if you do not need to create network maps, you can disable their creation in the *Network Maps* step. With each step, you have the option to skip creation of the current document type. If you have cleared the document creation checkbox of each step in the *Create Docu* wizard, the *Next* button will be disabled on the Summary page when you are done with the wizard. In this case, you must either click *Back* to enable at least one document or exit the wizard by clicking *Cancel*. This is also true if you open a wizard for a single document type and you clear the corresponding checkbox.



4.2.1.4 Scheduling

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

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



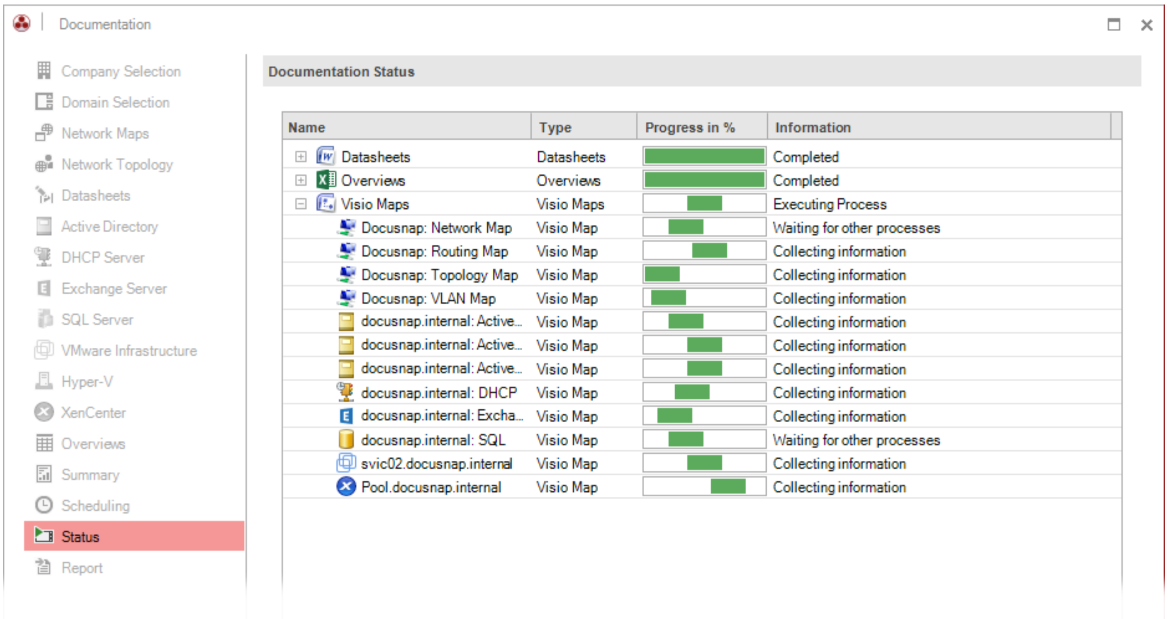
4.2.1.5 Status

The Status dialog shows the documentation creation progress. While the system creates the documentation, the navigation pane is disabled. So, if you need to abort this process, you can only click the *Cancel* button.

The actual progress of each task will be displayed by means of progress bars which can take on various states:

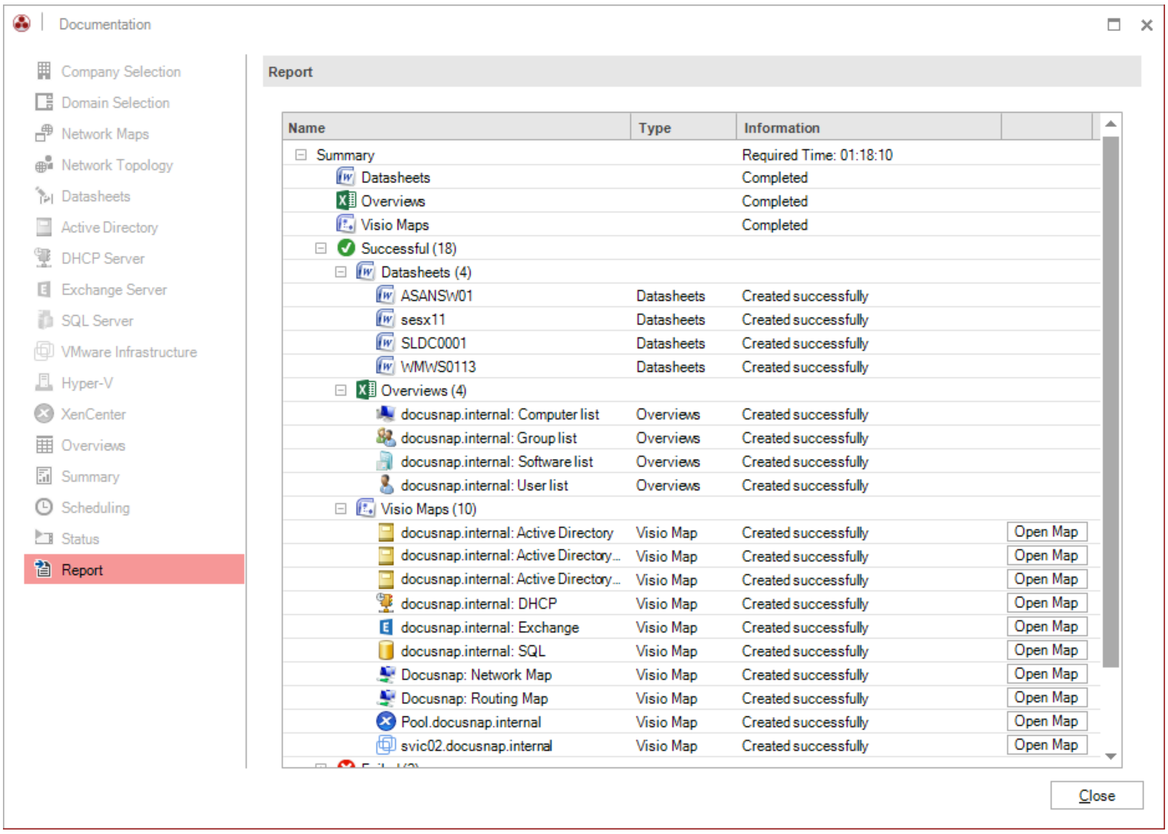
- A green progress bar indicates that a task has been performed successfully.
- A red progress bar indicates that an error has occurred during the creation of the respective document.

After creating the documentation, the wizard automatically takes you to the Report page where a final report is displayed.



4.2.1.6 Report Page

The final report shows which documents have been successfully created and which caused errors. The structure of the view reflects the individual documentation steps that were performed successfully or caused errors. Error messages will been shown for the steps that caused errors. If you wish to open the document right after its creation, click the *Open Map* button.



4.2.2 Map Files

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

Network Maps

Topology

Active Directory

Exchange Server

VMware Infrastructure

Hyper-V

SQL Server

DHCP Server

Overview

System Groups

Xen Server

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.

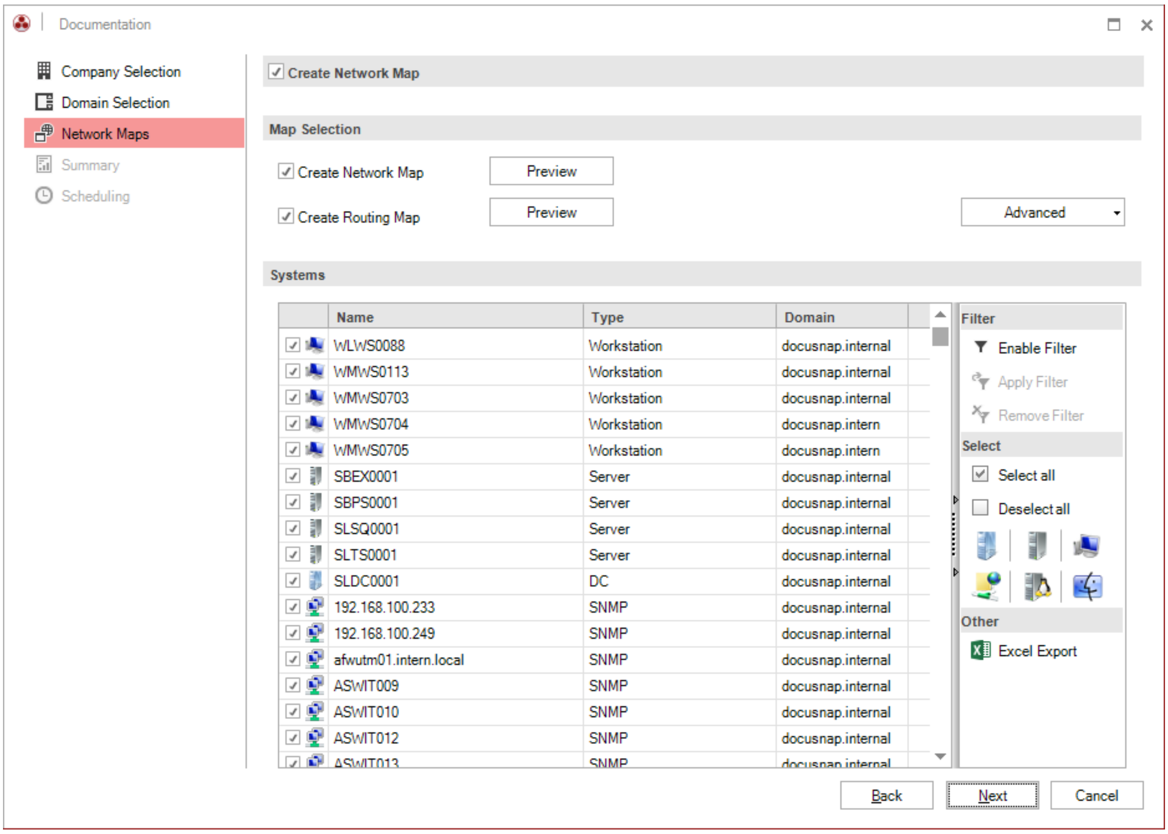
On this page, you can specify whether to create the network map and/or the routing map.

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 Filters chapter. To include only servers, workstations, Linux systems, etc. into your network map or routing map, click the corresponding icon(s). Clicking each icon a second time will exclude the respective system type again.

You can create datasheets for the individual systems. These datasheets can be linked to the objects in the network map and the routing map. The options under Advanced, which are also available as preferences in the *Configuration* dialog, allow you to specify the formats used for datasheet linking, if desired. The links will be created even if that particular datasheet does not exist yet. This way, datasheets created subsequently will also be linked to the systems in the network map and the routing map.

Docusnap also provides Management tools. For example, you can establish a remote desktop connection to a previously found system. The management tools can also be used with the two map types and the HTML file. For this purpose, a Scripts folder that contains the scripts required for the management tools will be created in the Datasheets folder.

If IT assets with a value of the *Network Information* type have been defined, they will be shown in the list. To include an IT asset in the network map, tick the corresponding checkbox.



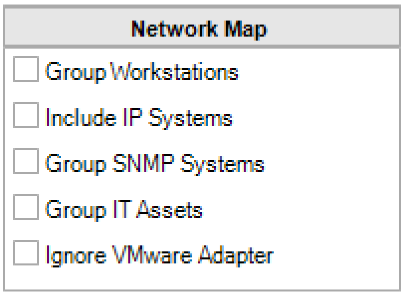
The preview window reflects the layout of the network map or routing map. You can change the layout, if required. For most network and routing maps, it is recommended to use the default settings. You can adjust both map types individually in the preview:

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.

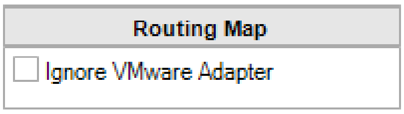
By enabling the *Group IT Assets* checkbox, you can group all IT assets and output them as a single object.

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 Maps folder.



Routing map

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



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 SNMP systems inventory scan. For virtual switches, you need to perform a VMware Infrastructure 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.

Use the *Ignore Virtual Structures* checkboxes to determine, if the *Topology Maps* and the *VLAN Maps* should include virtual structures.

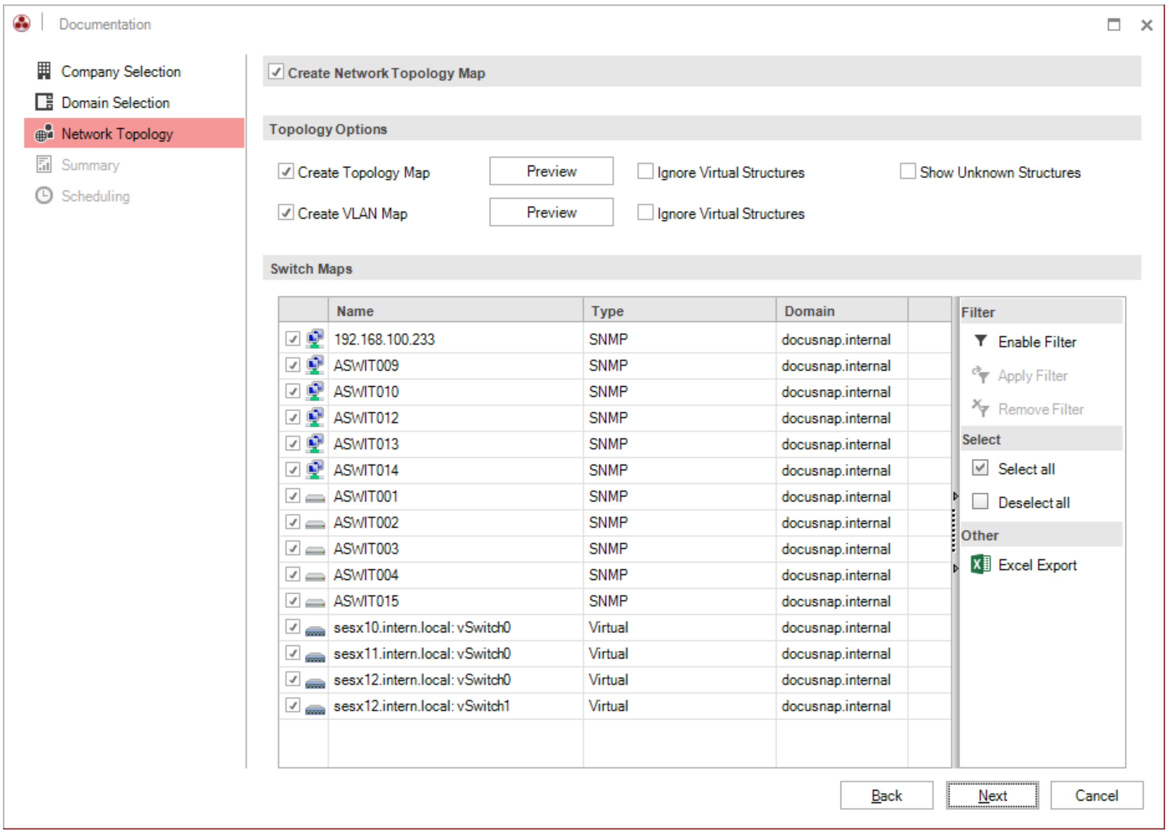
Docusnap will generate additional maps for switches and virtual switches that have been selected in the *Switch Maps* table. These maps will show the systems connected to the selected switch.

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.

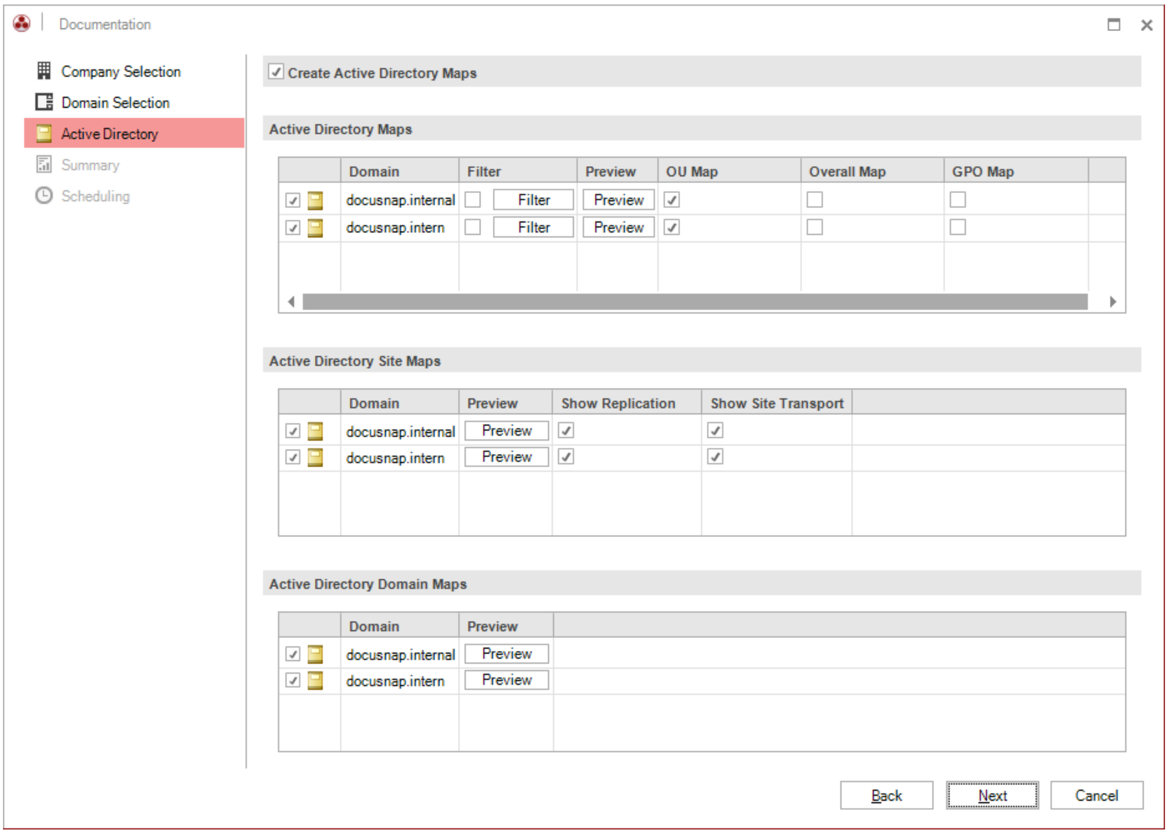
(\Documentation Path\Company\Domain\Maps\topology)



Documentation
Company Selection
Domain Selection
Network Topology
Summary
Scheduling
Create Network Topology Map
Topology Options
Create Topology Map
Preview
Ignore Virtual Structures
Show Unknown Structures
Create VLAN Map
Preview
Ignore Virtual Structures
Switch Maps
Name
Type
Domain
192.168.100.233 SNMP docusnap.internal
ASWIT009 SNMP docusnap.internal
ASWIT010 SNMP docusnap.internal
ASWIT012 SNMP docusnap.internal
ASWIT013 SNMP docusnap.internal
ASWIT014 SNMP docusnap.internal
ASWIT001 SNMP docusnap.internal
ASWIT002 SNMP docusnap.internal
ASWIT003 SNMP docusnap.internal
ASWIT004 SNMP docusnap.internal
ASWIT015 SNMP docusnap.internal
sesx10.intern.local: vSwitch0 Virtual docusnap.internal
sesx11.intern.local: vSwitch0 Virtual docusnap.internal
sesx12.intern.local: vSwitch0 Virtual docusnap.internal
sesx12.intern.local: vSwitch1 Virtual docusnap.internal
Filter
Enable Filter
Apply Filter
Remove Filter
Select
Select all
Deselect all
Other
Excel Export
Back
Next
Cancel

4.2.2.3 Active Directory

The Active Directory wizard step presents a choice of three different maps. Use the checkboxes on the left to select the domains and the maps to be created. The generated maps will be added to the directory structure.



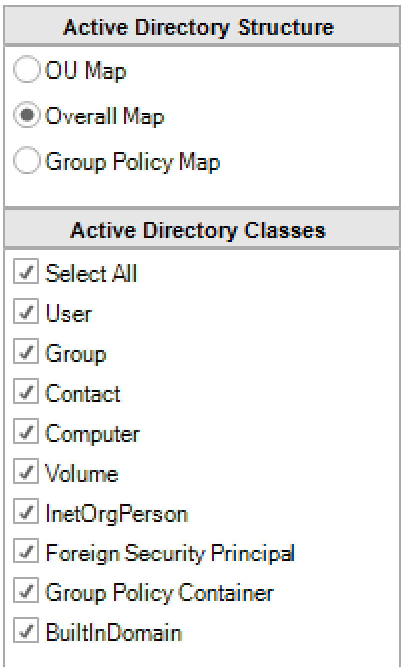
The preview allows you to check the look and feel of the maps. You can change the map layout, if desired. For most cases, we recommend to use the default settings.

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.

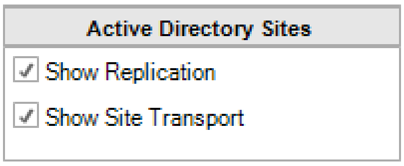


Active Directory Site Map

(\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.



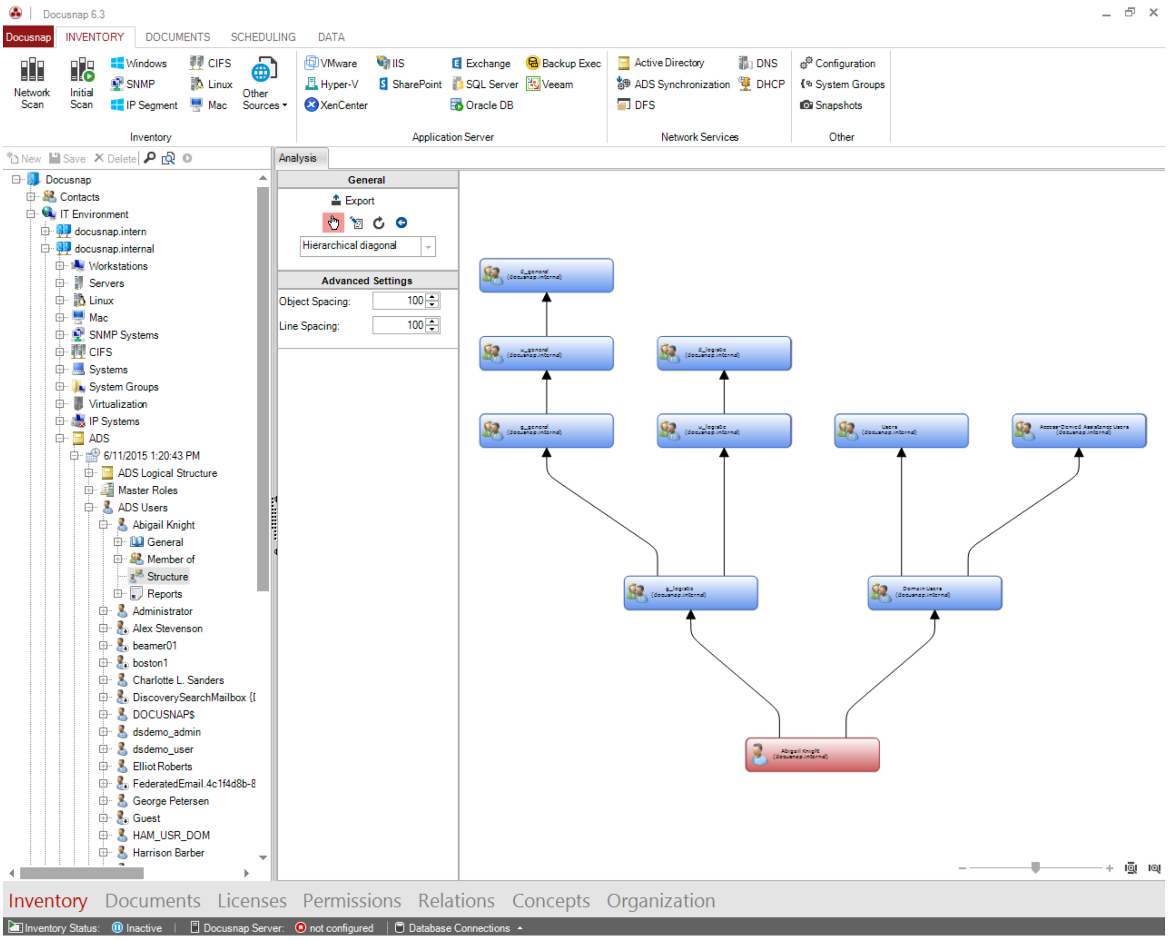
Active Directory Domain Map

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

An Active Directory Domain map graphically represents the domains that exist in a structure. This includes the trust relationships within the overall structure and within other structures. This map also shows the distribution of the operations master roles for the overall structure and the domains.

Active Directory structure of individual groups and users

The Active Directory map displays all groups and users. It is also possible to show only the relationship between a certain ADS user and an ADS group, or all ADS users belonging to an ADS group. The Structure tab in the main window displays all associated groups for the selected user or all group members for the selected group. You can export this structure.



4.2.2.4 Exchange Server

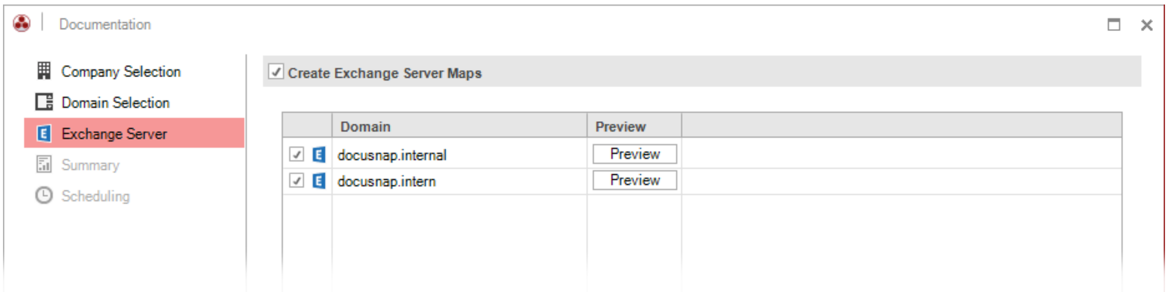
Exchange Server maps can be created either from the *Create Docu* wizard or the *Exchange Server* wizard.

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.



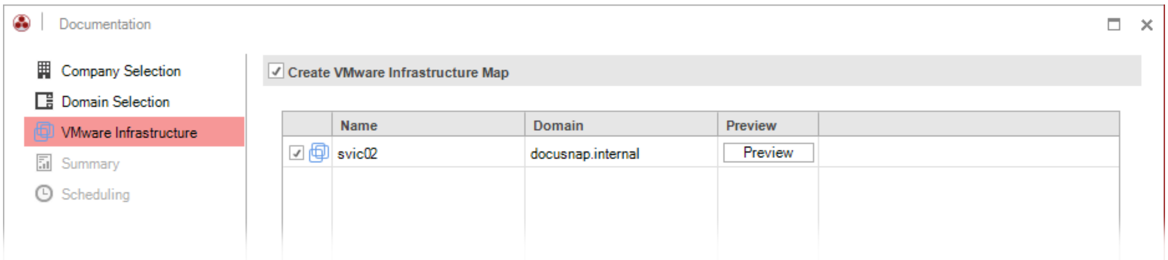
4.2.2.5 VMware Infrastructure

The VMware Infrastructure map can be created either from the *Create Docu* wizard or the *VMware Infrastructure* wizard.

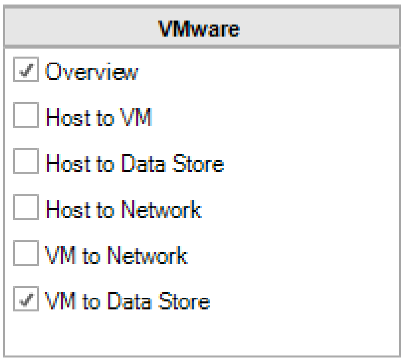
The preview allows you to check the look and feel of the maps. You can change the map layout, if desired. For most cases, we recommend to use the default settings.

The VMware map will be stored in the *VMware* subfolder of the documentation directory.

(\Documentation Path\Company\Domain\Maps\VMware\VMware name)



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.



4.2.2.6 Hyper-V

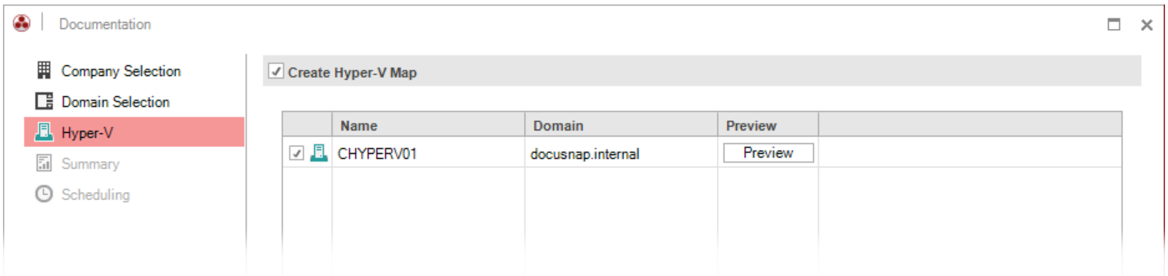
The Hyper-V Server map can be created either from the *Create Docu* wizard or the *Hyper-V* wizard.

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.

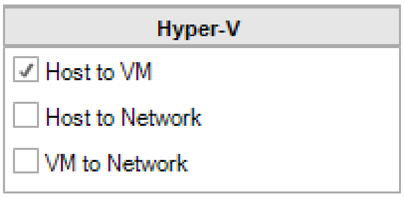
The preview window reflects the layout of the Hyper-V map. You can change the layout, for most Hyper-V maps, however, we recommend to use the default settings.

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)



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.

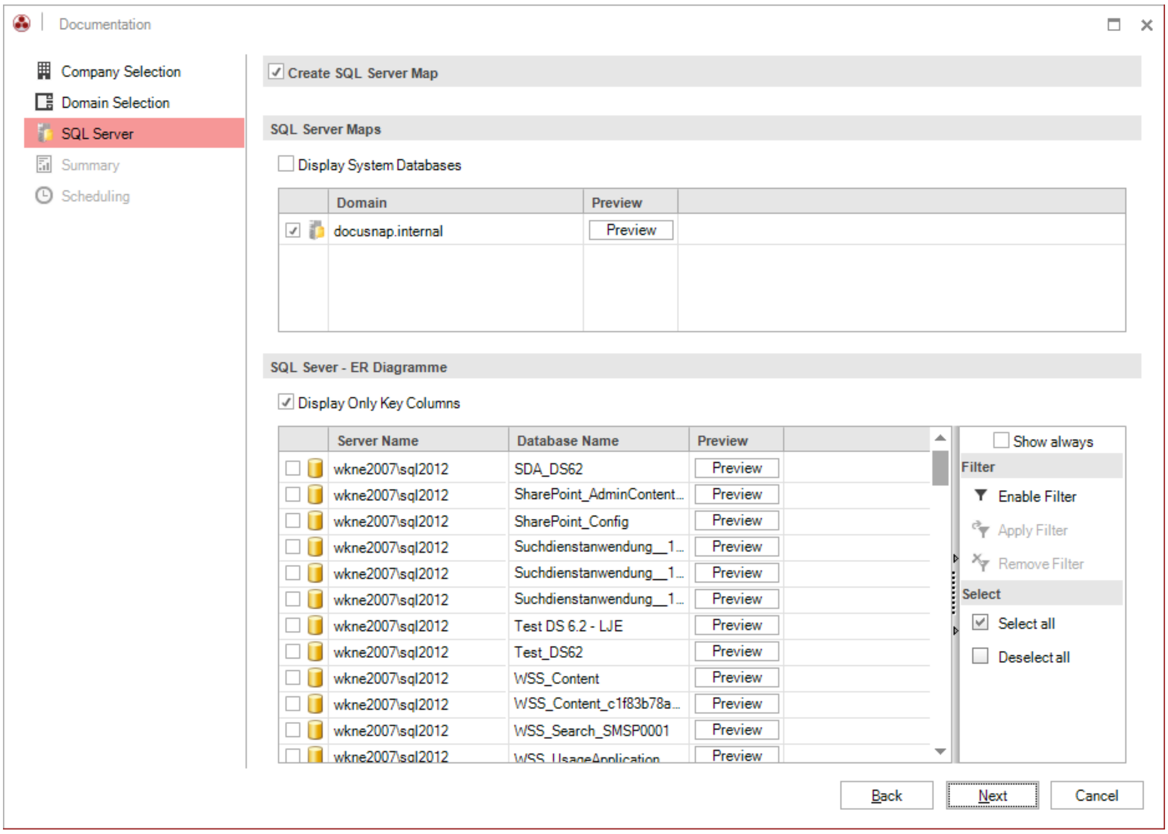


4.2.2.7 SQL Server

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

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

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



4.2.2.8 DHCP Server

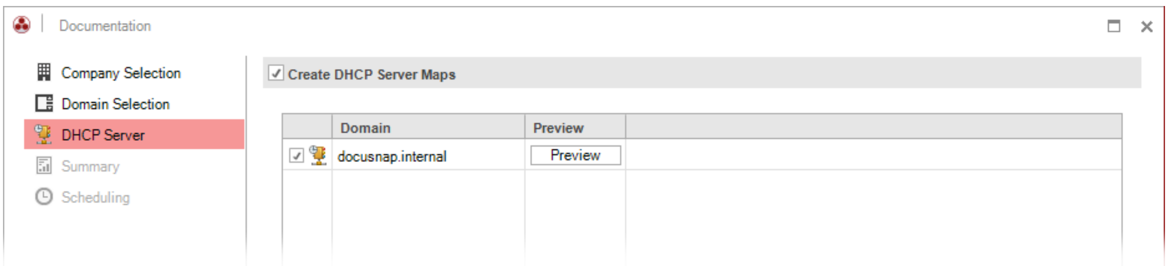
The DHCP Server map can be created either from the *Create Docu* wizard or the *DHCP Server* wizard.

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)



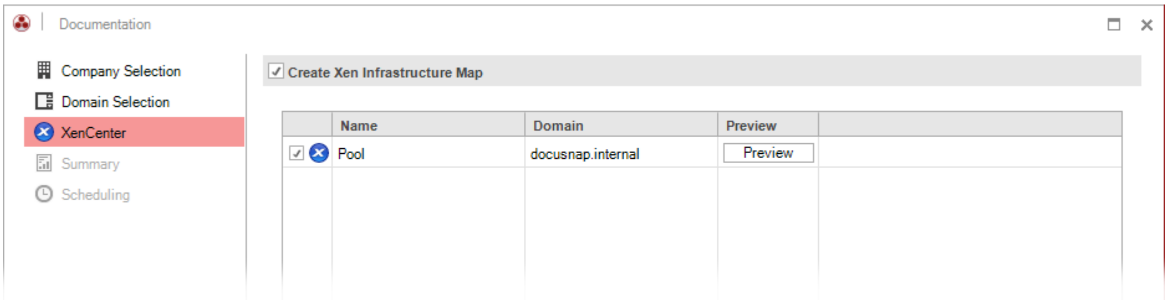
4.2.2.9 XenCenter

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)

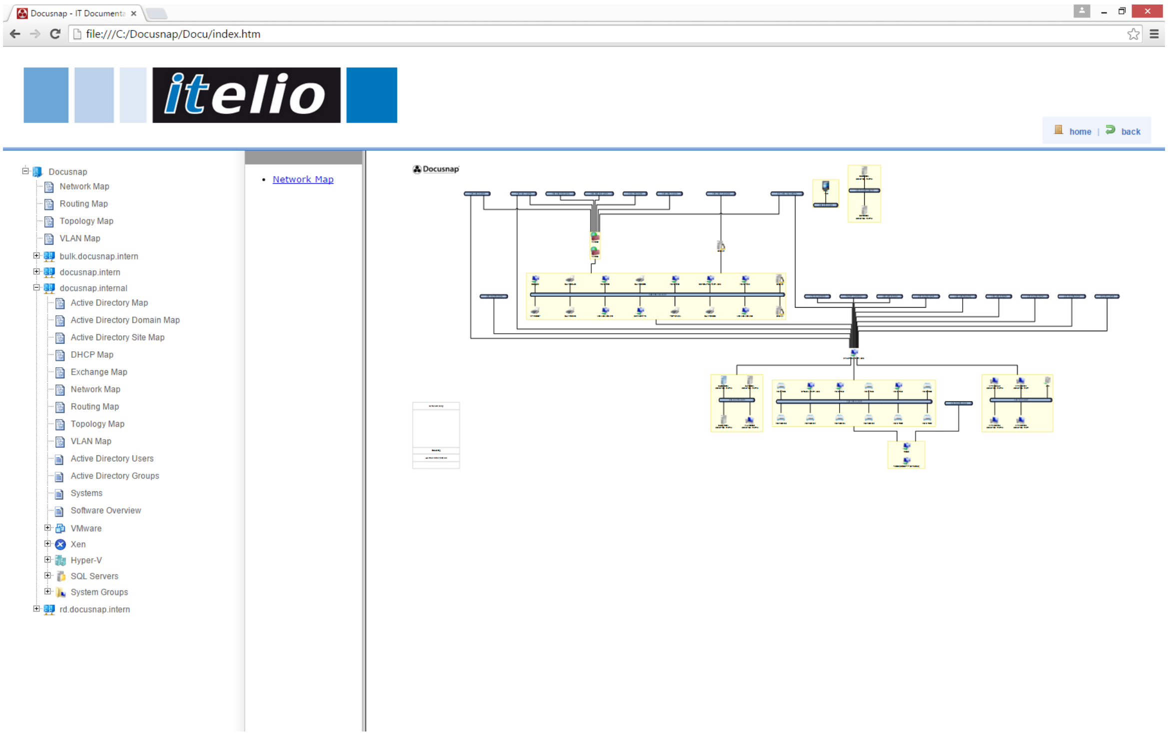


From the generated preview, you can specify which maps to create. The graphics display the interconnections between the various entities existing in a Xen environment. These entities are virtual machines, networks, hosts, and data stores. Each map reflects the respective assignments.

4.2.2.10 Overview Map

To create overview maps, either use the *Create Overview* wizard.

An overview map displays all maps that can be generated. If this map already exists in the directory, a link will be established so that you can open either the HTML map or the Visio map.



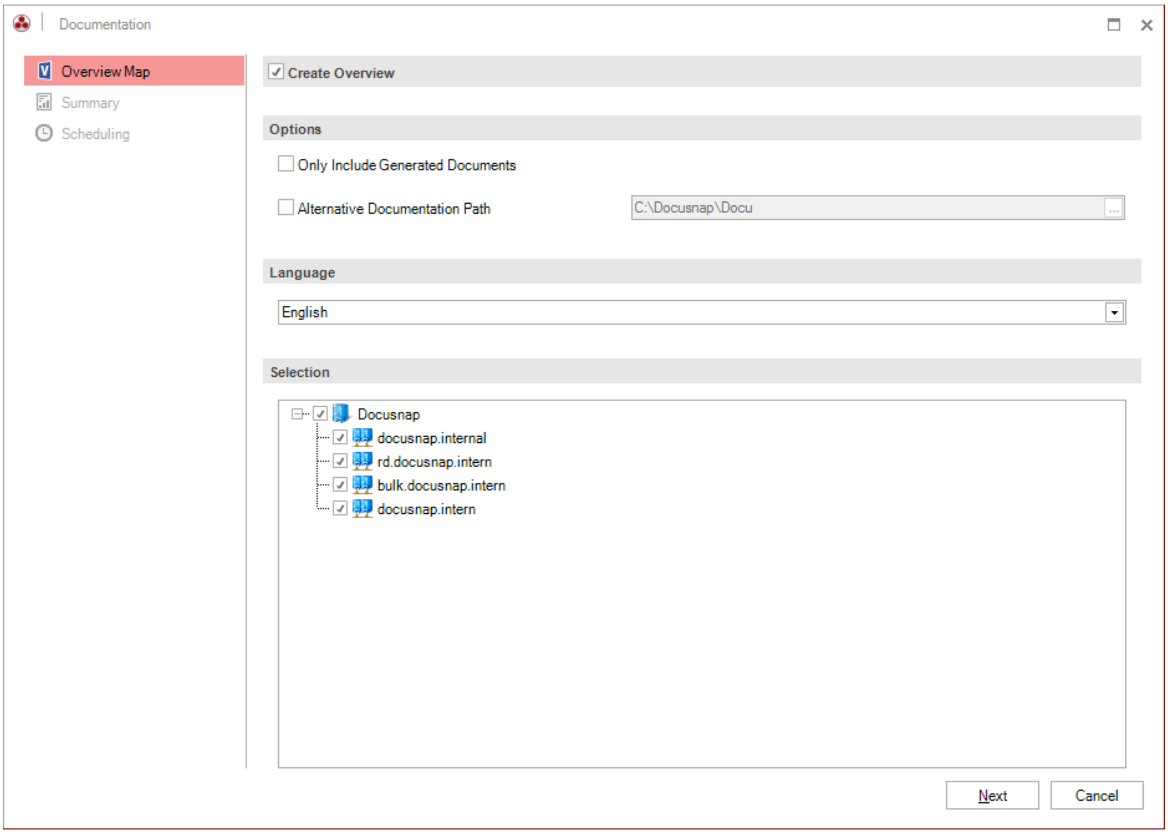
When creating the map select the company and the domains the map should include. Check the *Only Include Generated Documents* to only include links to documents which were already created. Otherwise all documents are listed and will be linked in the *Overview Map* once they are generated.

By specifying an *Alternative Documentation Path* a different path for the overview can be used.

The preview window reflects the layout of the overview map. You can change the layout, if required. For most overview maps, however, we recommend to use the default settings.

Overview maps will be stored in the *Maps* directory below the documentation directory for the corresponding company.

(\Documentation Path\index.htm)

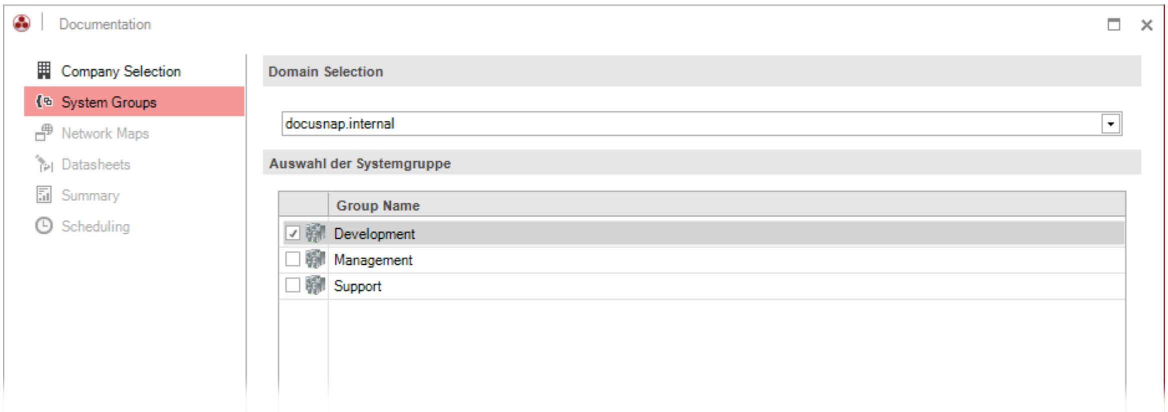


4.2.2.11 System Groups

In Docusnap, it is possible to define system groups. This means that systems belonging for example to the same department can be combined into one group.

For these system groups, you can create network maps, routing maps and datasheets. To create the documents for the system groups, use the *System Groups* button. The *Create Docu* wizard is not available for this kind of documentation.

In the first step, you select the domain. When creating network maps and datasheets for system groups, you must additionally select the desired system group. Only one group may be selected at a time.

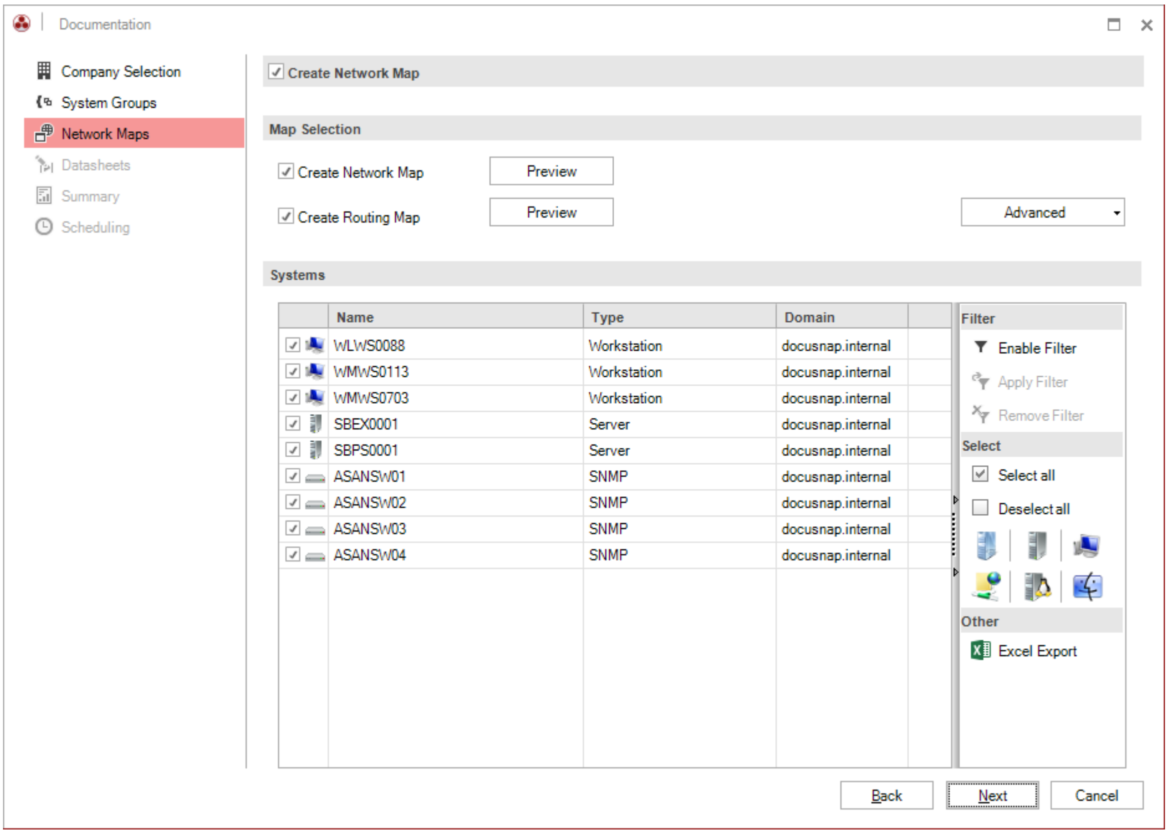


Then, you can select the systems to be included in the network map and/or routing map. Docusnap will only display systems that have been assigned to the selected system group. When you create network maps for system groups, you can also group workstations and SNMP systems. To include a system in the network map, tick the corresponding checkbox. Using the filter to the right of the selection list, you can enhance transparency by displaying only the desired systems. For more information about filtering, see the Filters section. If you want to include only servers, workstations, Linux systems, etc. into your network map, click the corresponding icon(s). Clicking each icon a second time will exclude the respective system type again.

In the next step, you can create datasheets for each system. These datasheets can be linked to the objects in the network map. The options under *Advanced*, which are also available as preferences in the Configuration dialog, allow you to specify the formats for datasheet linking, if desired. The links will be created even if that particular datasheet does not exist yet. This way, also datasheets created at a later time, will be linked to the systems in the network map.

The preview window reflects the layout of the network map or routing map. You can change the layout, if required. For most network and routing maps, you get the best results when using the default settings. What is more, the preview enables you to make the same changes as described under Network Map.

If you want to create only the datasheets for the system group, but not the network and routing maps, this step can be skipped. To do so, clear the *Create Network Map* and/or *Create Routing Map* checkbox.



In the next step, you can select the systems for which to create datasheets. The datasheets will contain all information about the selected systems, such as software, hardware, networks, services, local users, etc.

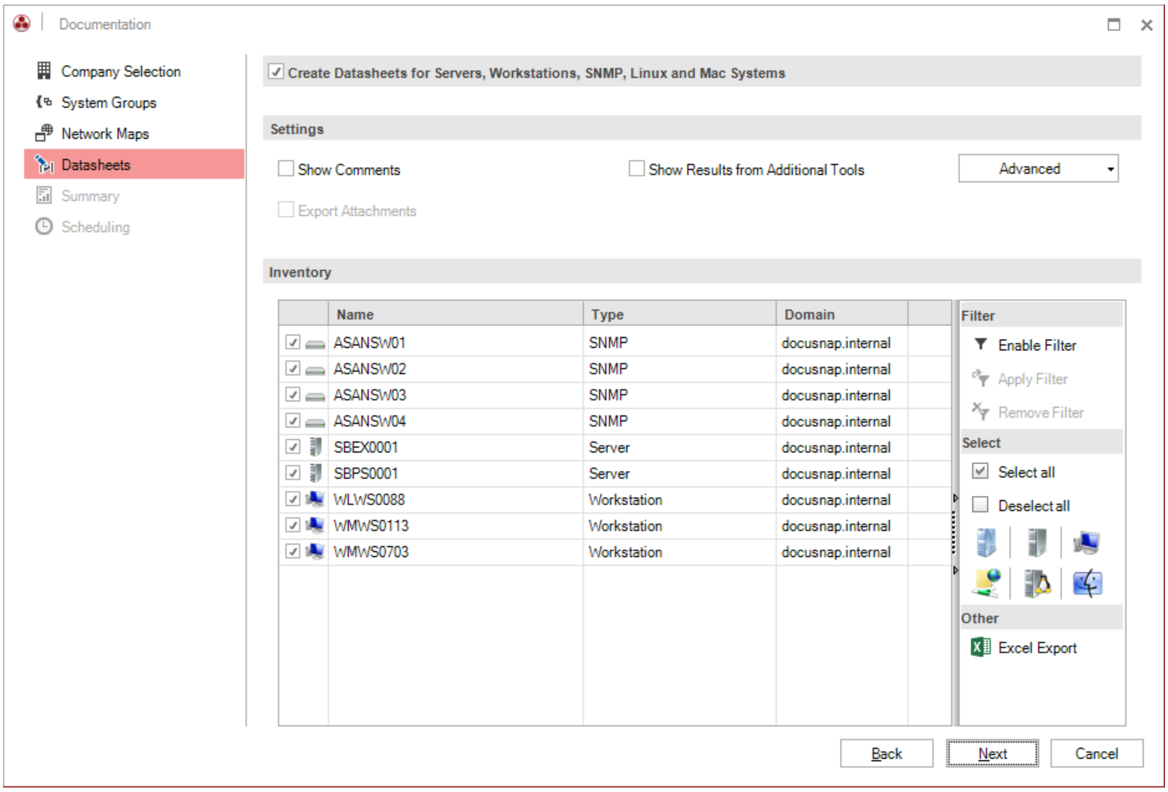
To create the network maps without any datasheets, disable the *Create Datasheets for Servers, Workstations, SNMP, Linux and Mac Systems* checkbox.

The datasheets may also include comments that have been stored with the systems. Comments saved at the system level will be shown, but no comments created for lower levels. In addition, the attachments can be included. If you enable the *Export Attachments* checkbox, the attachments to the comments will be listed in the report and the attachments themselves will be stored in the Comments folder.

(\Documentation Path\Company\Domain\System Groups Name\DataSheets\Name of the System\Attachments\Comments)

It is possible to integrate additional tools into the scanning process. You can add these tools from the *Additional Tools* in the Docusnap Management. In case an additional tool is used for inventorying, the results can be output along with the datasheet. If the *Show Results of the Additional Tools* checkbox is enabled, the results found by the additional tool for each system will be exported to a folder under the Datasheet folder.

(\Documentation Path\Company\Domain\System Groups Name\DataSheets\Name of the System\ToolResults)



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, SNMP, Linux and Mac systems that exist in the selected domains will be displayed. If the checkbox next to a system is enabled, a datasheet will be created for it.

Each datasheet contains all current information that is located at the levels below the node of the selected system.
The datasheets may also include comments that have been stored with the systems. Comments saved at the system level will be shown, but no comments created for lower levels. In addition, the attachments can be included. If you enable the *Export Attachments* checkbox, the attachments will be listed with the comments in the report and the attachments themselves will be stored in the *Comments* folder.

(\Documentation Path\Company\Domain\Datasheets\Name of the System\Attachments\Comments)

When performing an inventory scan, additional tools can also be included. You can add these tools from the Additional Tools page in the Docusnap Management. The results of an additional tool used for inventorying can be output along with the datasheet. If you enable the *Show Results from Additional Tools* checkbox, the results this tool found for the respective system will be exported to a folder under the Datasheet folder.

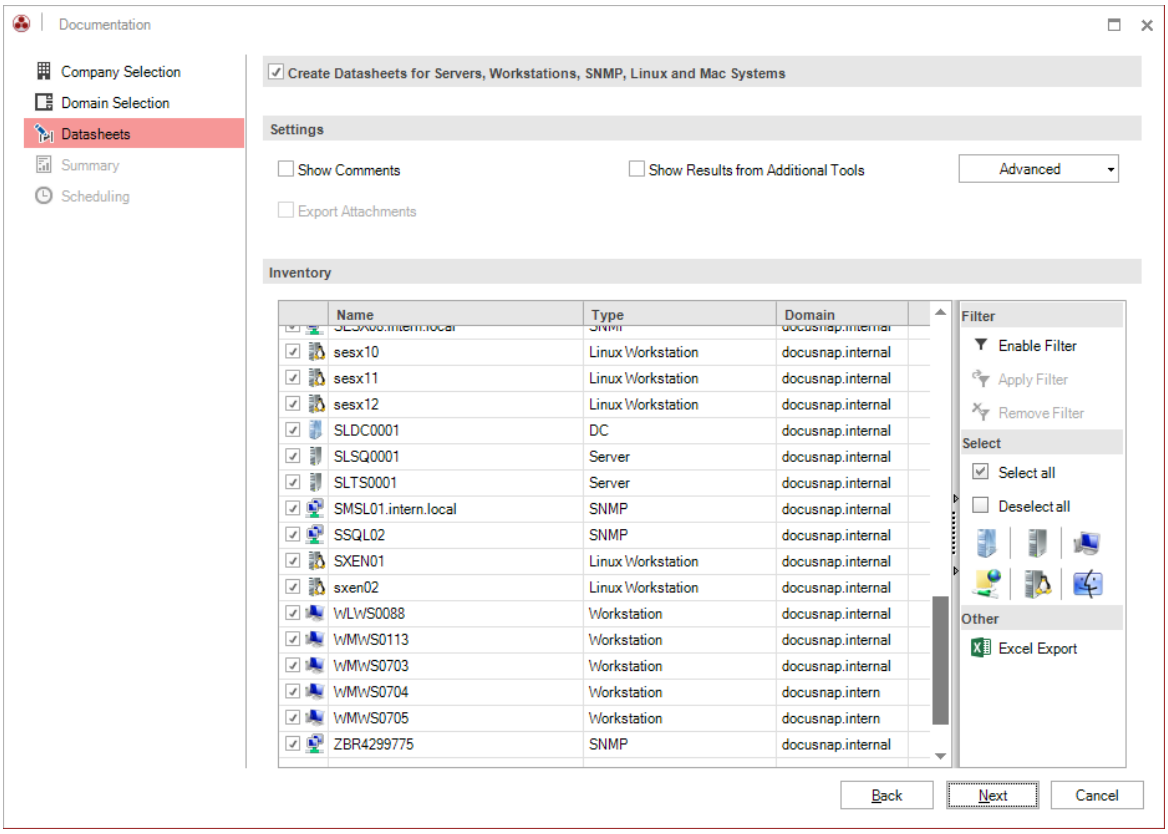
(\Documentation Path\Company\Domain\Datasheets\Name of the System\ToolResults)

To filter the display, you can select one of the filter buttons on the right.

When creating datasheets, you can additionally enable the *Print Preparation* option. It can be used to generate an additional file with the *.mdc* file extension. This file is required if you want to use the *Print Docu* wizard to print the documentation.

The documentation will be stored in the *Datasheets* subfolder of the documentation directory.

(\Documentation Path\Company\Domain\Datasheets)



4.2.4 Overviews

Overviews can be created using either the *Create Docu* wizard or the *Overviews* wizard.

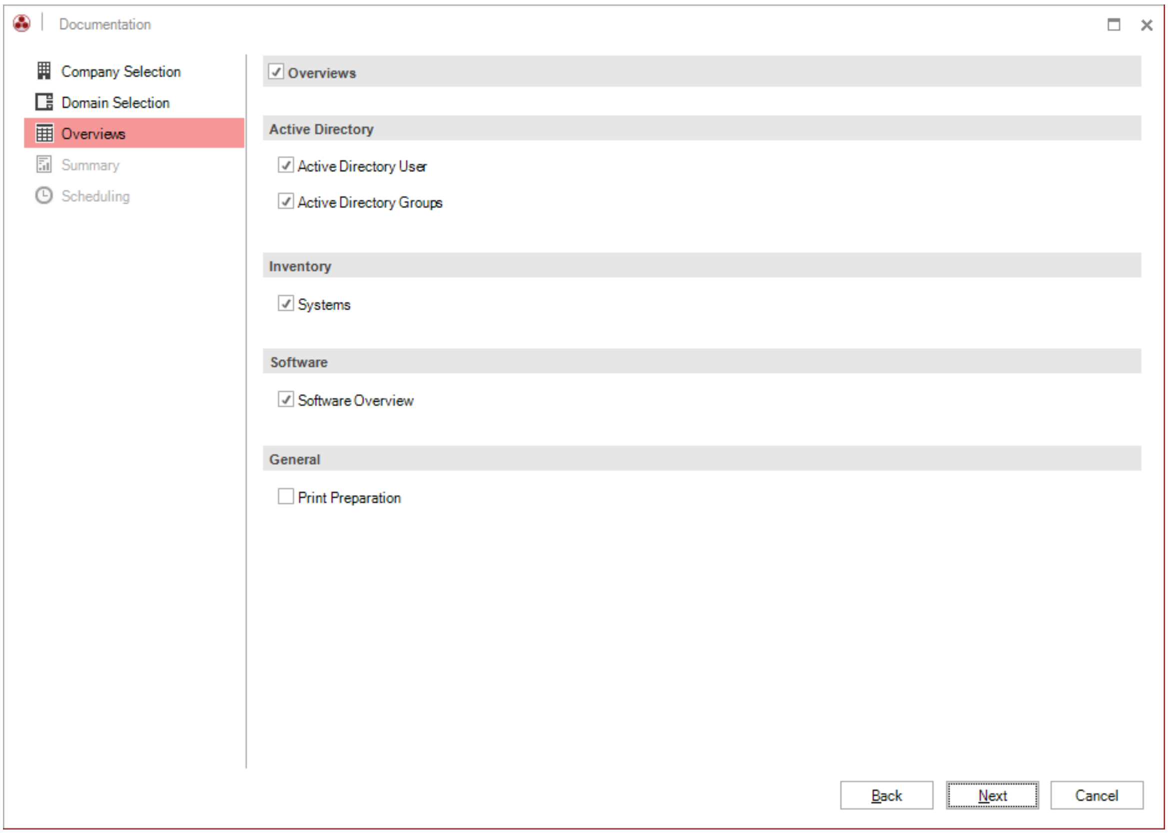
After you have selected the domains, you are presented with a choice of overview documents that can be created. Enable the checkbox of every overview type you wish to create.

The overviews will be stored in the *Overview* subfolder of the documentation directory under the corresponding company and domain. Creating an overview results in three files. The *computerlist_en.html* and *computerlist_en.xlsx* files are based on the report and include the company and the name of the author. The *computerlist_plain_en.xlsx* file is a flat table in Excel format.

When creating overviews, you can also tick the *Print Preparation (MDC)* checkbox. It can be used to generate an additional file with the *.mdc* file extension. This file is required if you want to use the *Print Docu* wizard to print the documentation.

The files will be stored in the *Overview* folder.

(\Documentation Path\Company\Domain\Overview)

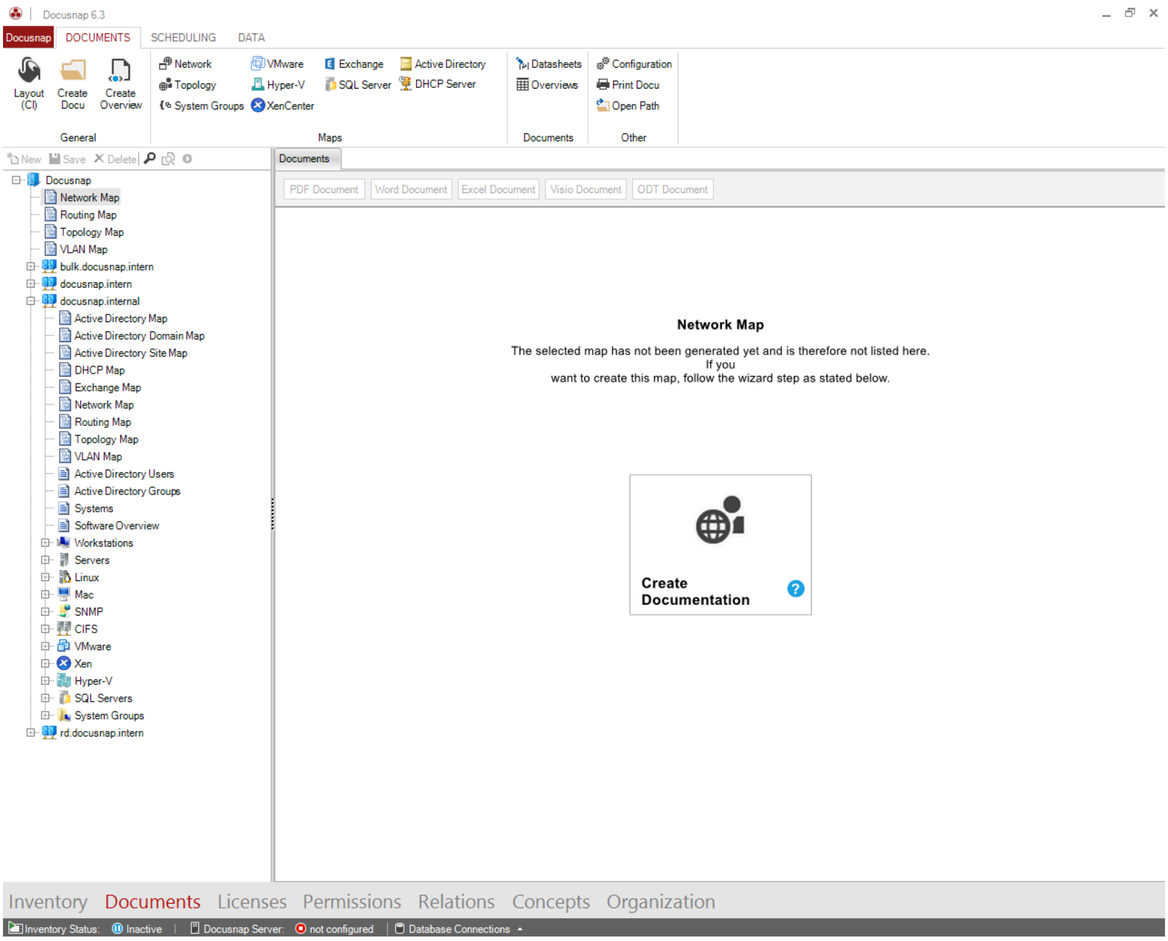


4.3 Documentation Tree View

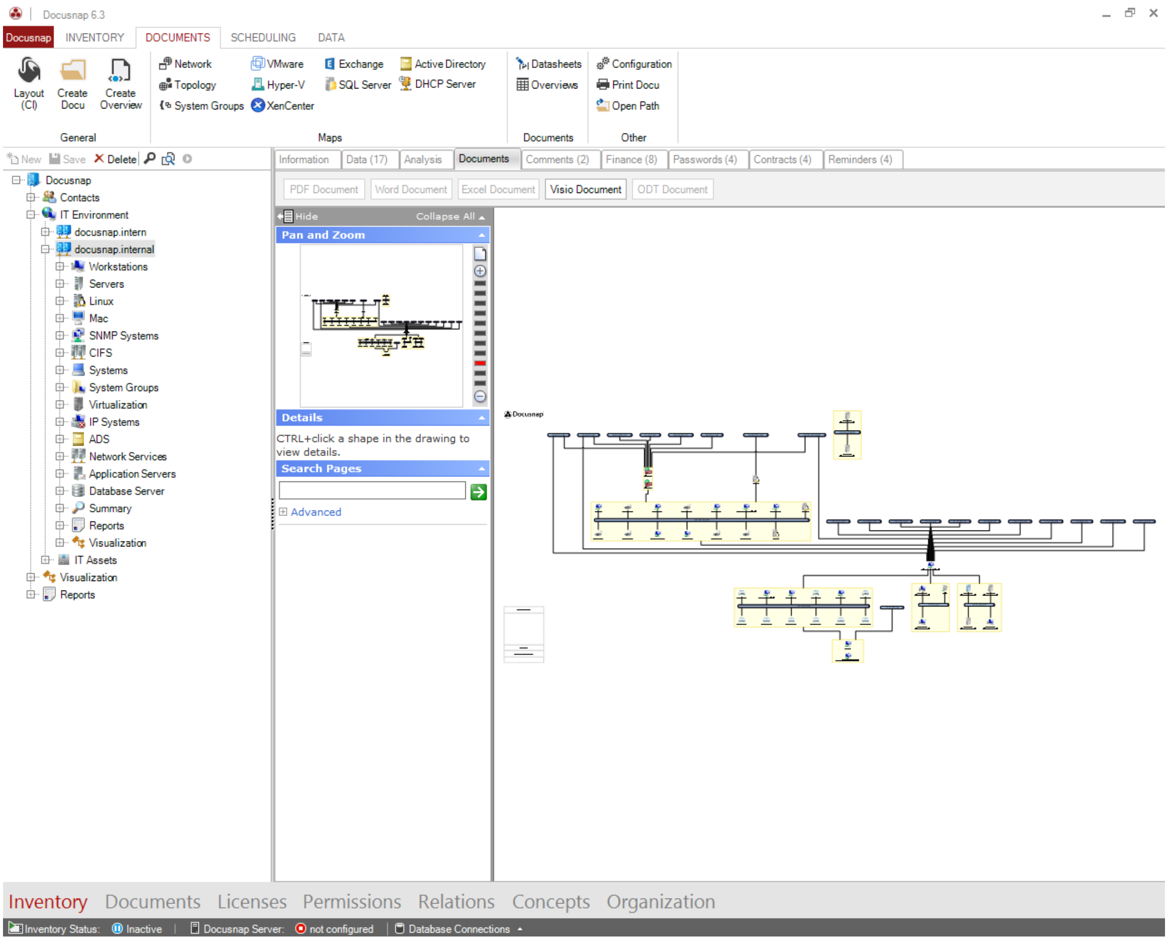
The Documents tree view was designed to help you manage and create your documentation and enhance the transparency of the entire process.

If no maps, datasheets or overviews have been created for the selected Explorer node yet, the *Documents* tab in the right pane displays a dashboard-type indicator that helps you to create the respective document. What is more, it allows you to access the specific online help for the desired map.

You can use the Dashboard as a shortcut to launch the required wizard without accessing the ribbon.



If the document exists already, the desired map is displayed instead of the Dashboard. The *PDF Document, Word Document, Excel Document, Visio Document* and *ODT Document* buttons allow you to display the map in the desired format. The desired format is only available if the document was created in that format.



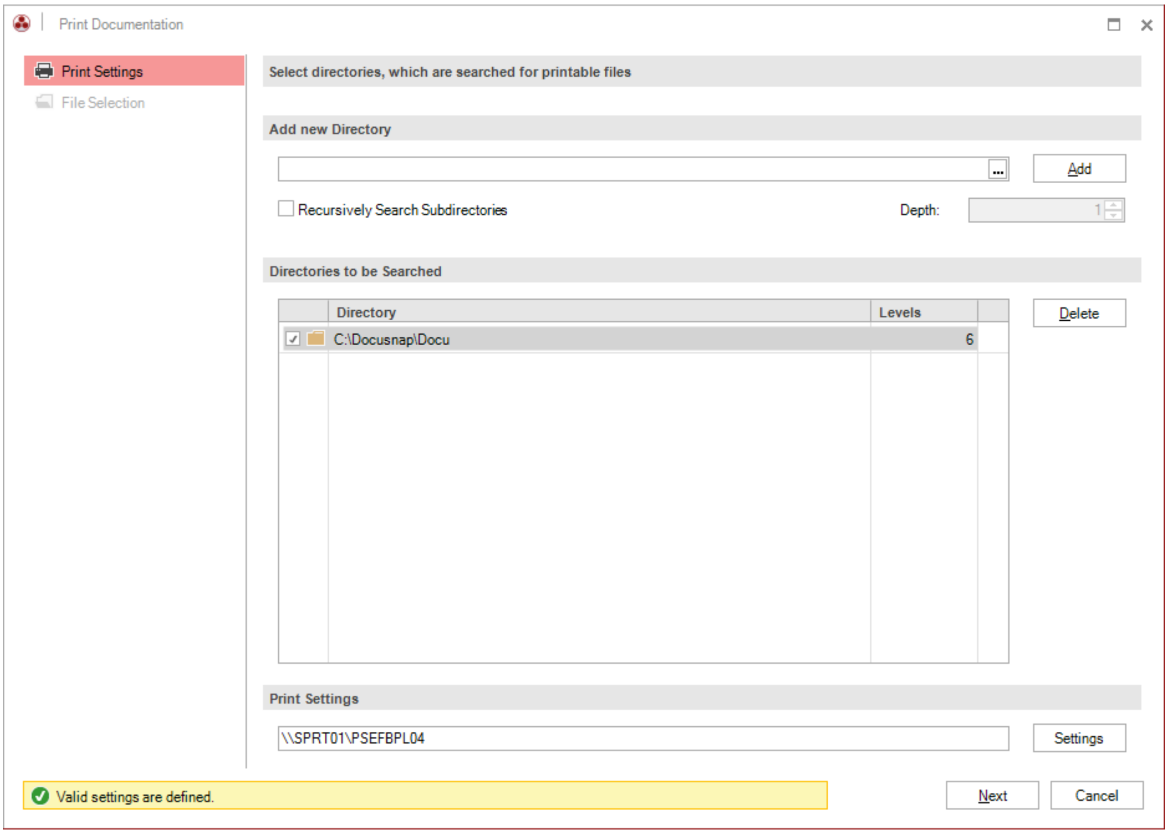
4.4 Print Documentation

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.

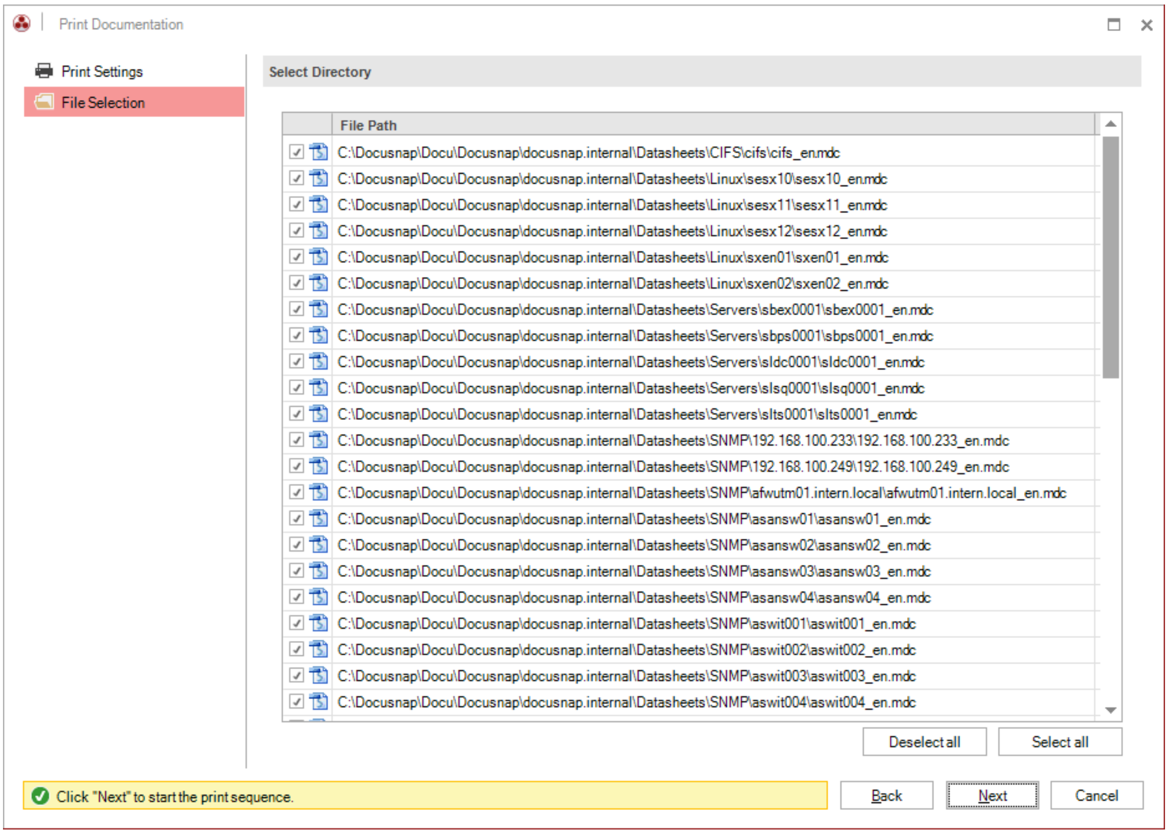
To start the *Print Documentation* wizard, click the *Print Docu* button. In the *Print Settings* step, select the folder where the documents are stored. If files to be printed are located in subfolders of the selected folder, you can include them by ticking the *Recursively Search Subdirectories* checkbox. 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 already.

If you clear the checkbox next to a folder, the documents from that folder will not be available for printing.

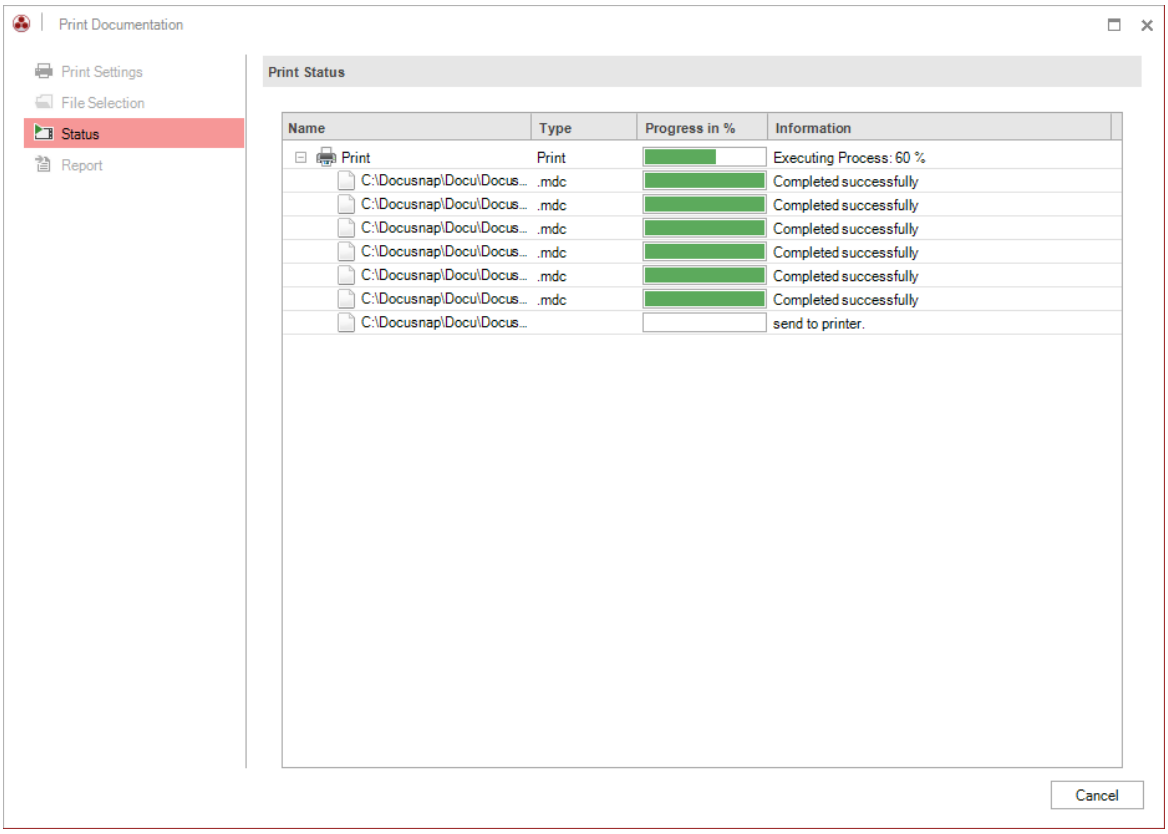
The selected printer will be displayed in the Print Settings area at the bottom of the dialog. A different printer, as well as additional print settings, may be selected by clicking the *Settings* button. Clicking the *Next* button takes you to the *File Selection* step in the wizard. The *Next* button will remain disabled until a folder has been selected.



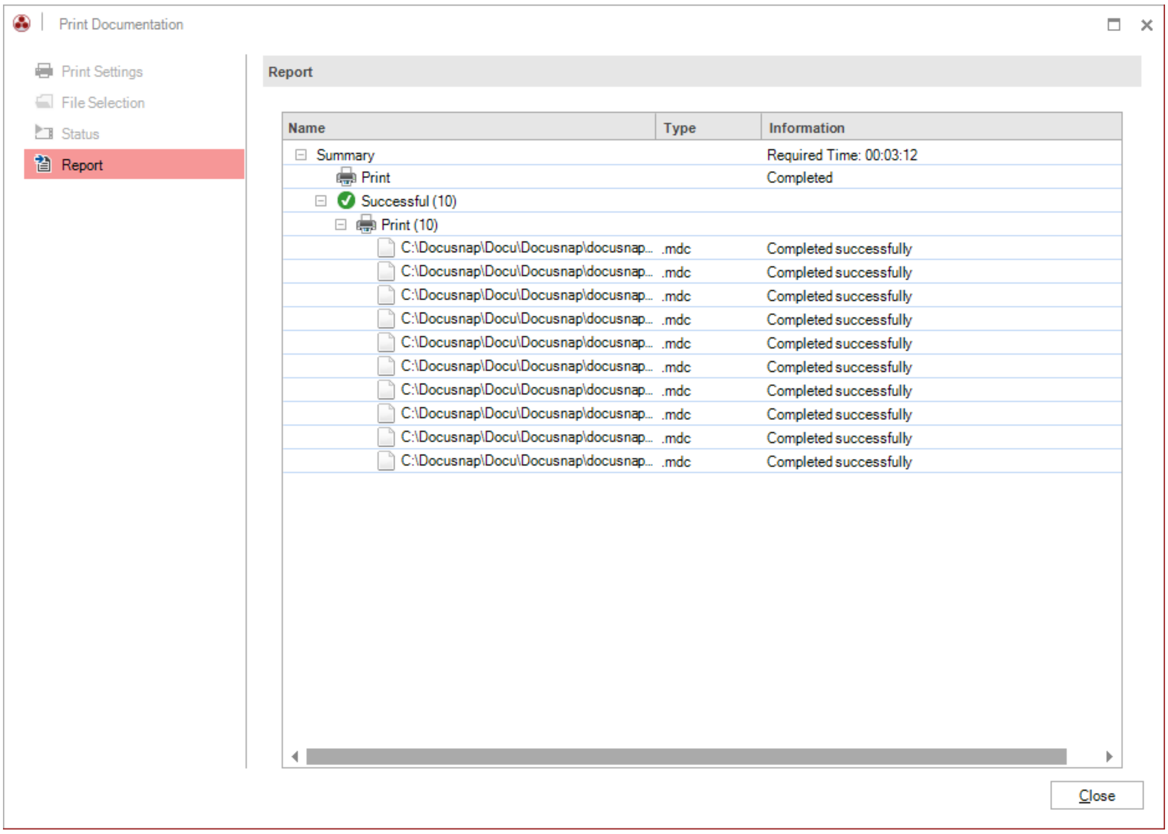
All files that have been stored in the selected folder and have the *.mdc* file format will be displayed in the file selection step. When you click the *Deselect All* button, your document selection will be undone. Only selected documents will be printed. To start the print job, click the *Next* button. The button will remain disabled until at least one document has been selected.



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.



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



4.5 Configuration

Settings to create the documentation can specified in the *Configuration - Documentation* dialog. Click the *Configuration* button in the *Documents* ribbon or the *Documentation* button in the Docusnap Menu to open the dialog.

General Settings

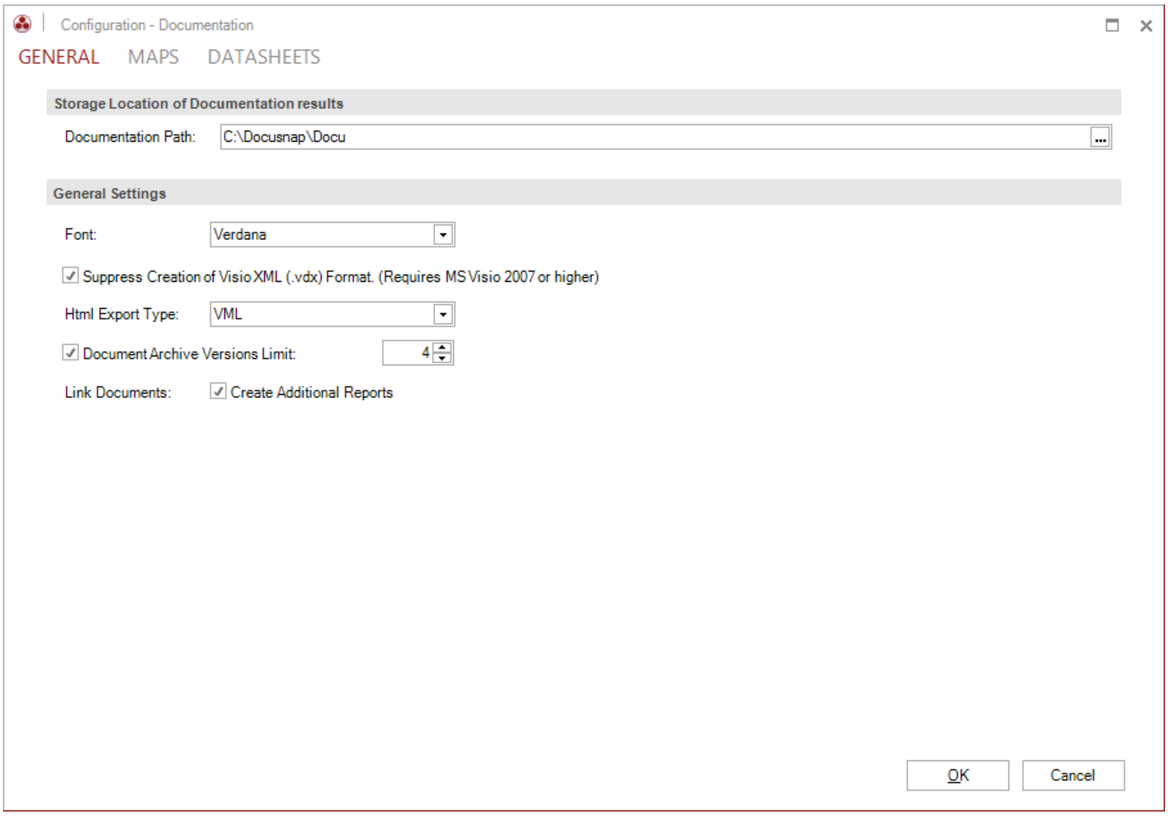
In the *Documentation Path* field, you can specify the location where documents (overviews, data sheets, maps) will be stored when the program creates the documentation. Click the ... button to select the folder for storing the documents.

Changes to the font only affect the information area in the various Visio maps.

By specifying the *Document Archive Versions Limit* using the checkbox of the same name and the number field, you can set how many versions of the documents created using the Documentation module will be archived in the archive folder.

When you create maps, reports are created along with them. These are saved in the *Reports* folder which is a subfolder in the documentation path. If you do not want these reports to be created, disable the *Create Additional Reports* checkbox.

Maps can be generated in the native Visio format (.vsd) and in the Visio XML format (.vdx). You can choose which format should be created. When maps are generated with the Docusnap Server only the .vdx format can be created automatically.



Maps

In network maps, it is possible to link documents to various devices and overviews. Using the *Word, HTML, PDF, Excel*, and *ODT* checkboxes, you can specify the document types to be linked.

Save Document Pages as Separate Documents: When creating some of the maps, the information is distributed on several tabs. By activating the *Save Document Pages as Separate Documents* option each tab is saved as a separate document. This is especially helpful for a large network, if the document cannot be saved, because of the number of tabs.

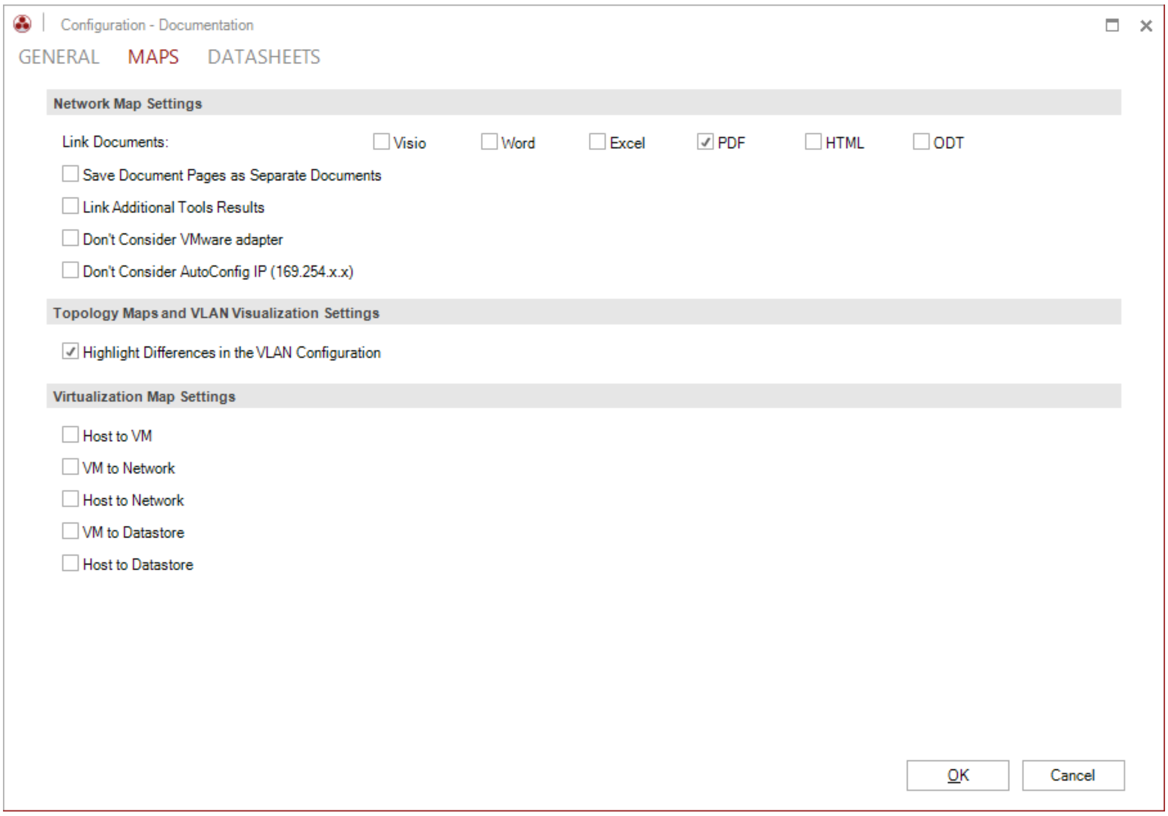
If additional tools were used when inventorying Windows systems, the results file can also be linked with the Visio maps.

When creating the network map, you can choose that network adapters created by the VMware Player/VMware Server software will be ignored. This checkbox is also available when you open the network map preview. You can change the setting there, too.

Don't Consider AutoConfig IP: Through this option the AutoConfig IP is ignored in network maps and routing maps.

If the *Highlight Differences in the VLAN Configuration* checkbox is activated, then the port-to-port configuration in VLAN map is highlighted in color.

In the group *Virtualization Map Settings*, you can specify the VMware maps to be created by default in Docusnap. (For more information, see VMware Maps.)



Datasheets

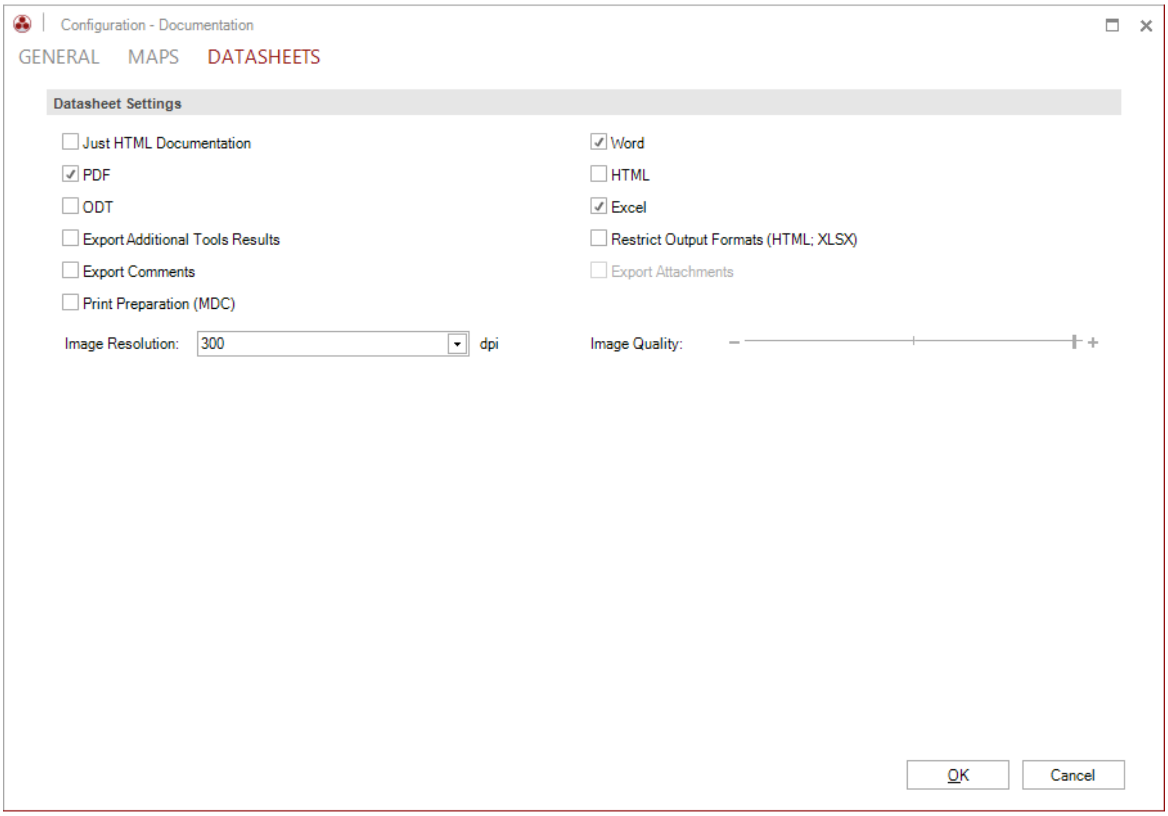
Datasheets contain a summary of the data for Windows, Server, Linux, Mac, SNMP systems and CIFS. For each device, a separate datasheet will be created. Datasheets can be created in Word, HTML, PDF, Excel or ODT format. In the *Datasheet Settings* group, you can determine which files will be created by default.

If you enable the *Export Additional Tools Results* option, the files will be saved in an additional folder below the folder containing the documents.

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.



Part V

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 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 *Permissions* 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.

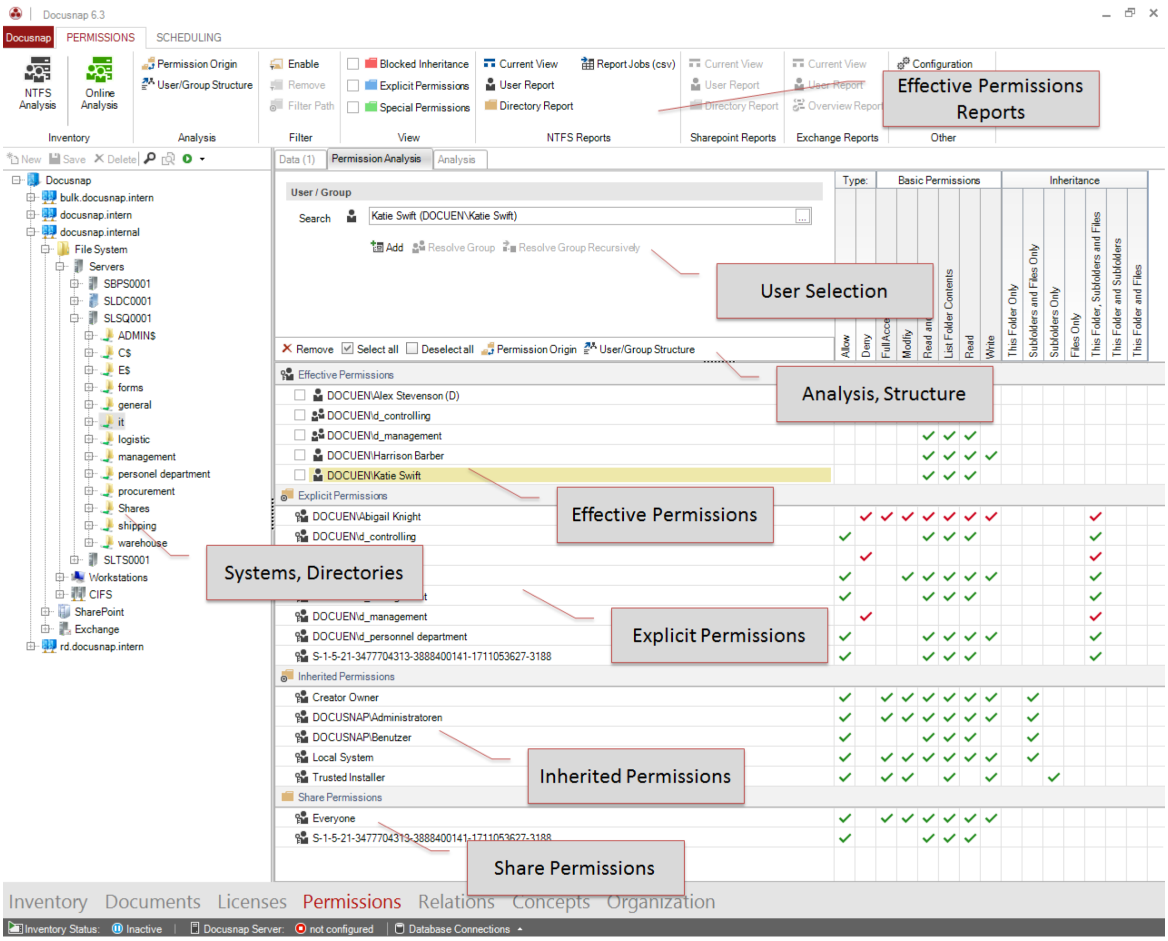
The Permission Analysis tab shows the current situation based on the permissions to a directory or SharePoint.

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.



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 *Permissions* ribbon.

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

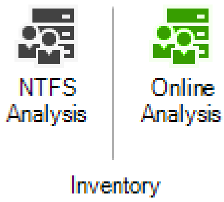
Click the *User/Group Structure* button to display a diagram showing the nesting of users or groups for the selected user/group.

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.

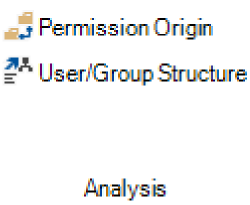
Inventory

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



Analysis

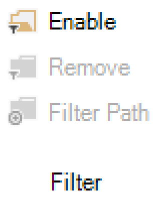
- Permission Origin: Click the *Permission Origin* button to open the permission structure for the currently selected user.
- User/Group Structure: Click the *User/Group Structure* button to display the group or user nestings diagram.



Filter

- Enable/Remove: The Data Explorer displays all directories of a scanned system. To display the filter below the permissions list, click the *Enable* button in the *Filter* group of the ribbon. Once you have defined the desired filter criteria (Write, Read, etc.), only those directories will be displayed in the Data Explorer that match the selected user or group filter.

- Filter Path: The *Filter Path* dialog only opens for the analysis of SharePoint permissions. Since the SharePoint permission structure is different from the structure of NTFS permissions, this dialog is used to select the desired starting point for the analysis. According to the filter you set, only the directories below the starting node that correspond to the selected users/groups will be displayed.



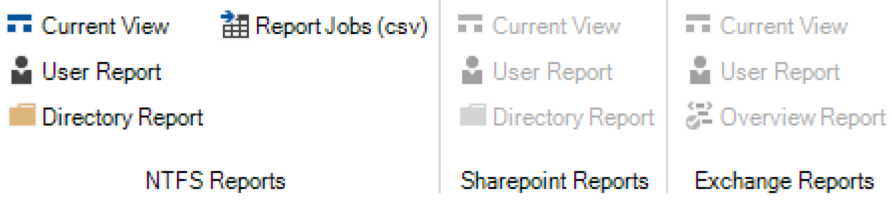
View

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

NTFS Reports / SharePoint Reports / Exchange Reports

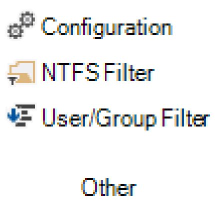
- When you click the *Current View* button, the permissions displayed on the Permission Analysis tab will be output in a report.
- By clicking the *User Report* button, you can create a report which shows the effective permissions to the selected directory and its subdirectories or for Exchange permissions to the mailboxes, mailbox folders, and public folders.
- Clicking the *Directory Report* button creates a report which displays all users who have a permission to the selected directory and its subdirectories.
- Clicking the *Overview Report* button creates a report which displays all users who have permissions to the mailboxes, mailbox folders, and public folders.

- Report Jobs (csv): By importing a CSV file multiple jobs to generate Directory Reports for NTFS can be created simultaneously.



Other

- The setting, if the number of inventoried levels for the NTFS analysis should be limited, is set in the *Configuration - Permission Analysis* dialog.
- Clicking the *NTFS Filter* option opens the *Manage NTFS Filter* dialog. In this dialog, you can specify directories to be excluded from the NTFS analysis. For an explanation of this dialog, refer to the NTFS Filter section.
- You can use the User/Group Filter to exclude selected users and groups from the directory reports.



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 Network Inventory function. Also, users and groups must have been inventoried with of a complete Active Directory scan. If this is the case, you can start the inventory process for NTFS permissions.

SharePoint Servers

To perform a permission analysis for a SharePoint environment, you need to scan the SharePoint servers first. Moreover, a complete Active Directory scan must have been performed in order to obtain the users and groups required for the analysis. Docusnap will determine the SharePoint permissions during the SharePoint inventory scan.

Exchange

Docusnap will determine the Exchange permissions during the Exchange inventory scan. In order to perform a permission analysis, an Active Directory scan is required as well.

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

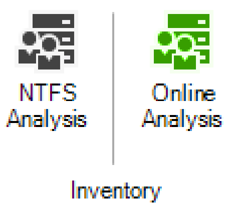
Note: Steps 1 and 2 are described in the Inventory section.

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 *Permissions* ribbon.

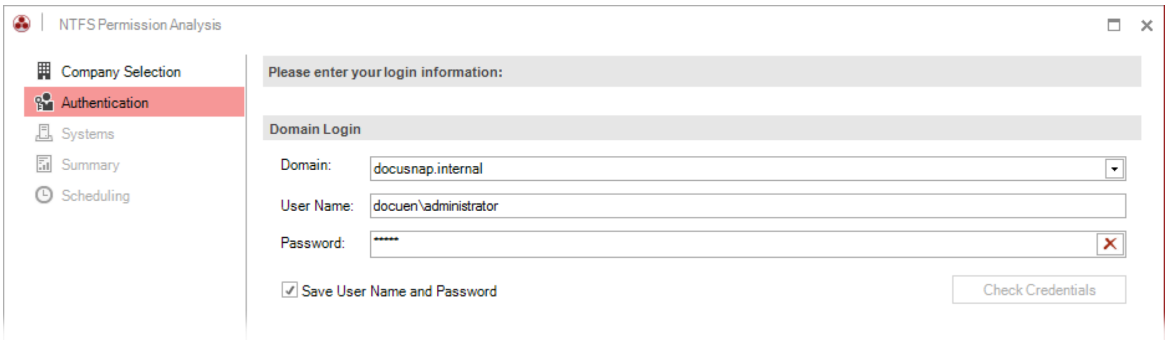


Company Selection

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.

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.



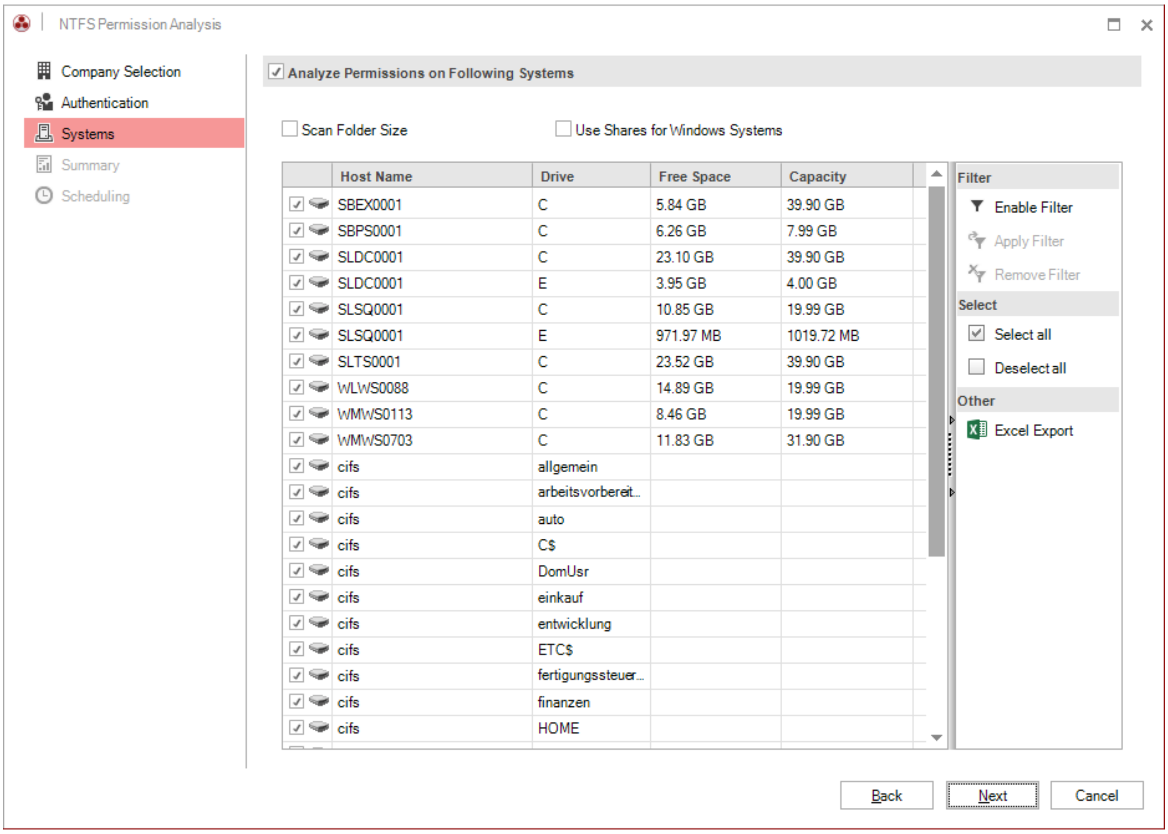
Systems

All Windows systems that have been scanned will be displayed on the *Systems* page. In addition, it lists all drives on the corresponding systems. Alternatively, the individual shares of a system can be listed by checking the checkbox *Use Shares for Windows Systems*. Use the checkbox next to each system to indicate whether the permissions for that system are to be scanned or not. If a system has multiple drives, a separate system entry will be listed for each drive. If the checkbox *Use Shares for Windows Systems* is checked, then all the shares of a system are available for selection. Thus, the scope of the permission scan can be selected individually for every system. The Filter group is displayed on the right. Using a filter, you can filter the systems list for individual values.

For systems based on the SMB or CIFS protocol, such as NetApp Filer or Samba Server, the available shares rather than the local drives will be displayed for selection on the those systems.

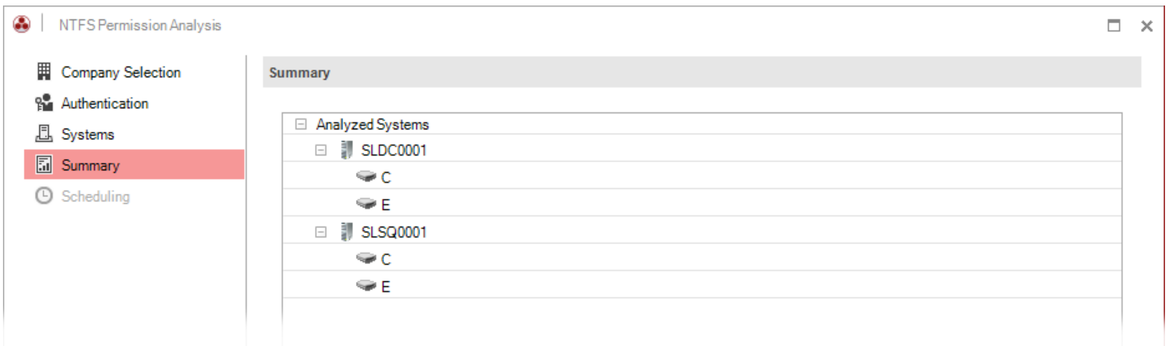
If the checkbox *Scan Folder Size* is selected, the folder size is inventoried for each folder. Otherwise, each folder will be displayed with the size 0. To determine the folder size for large folders can prolong the duration of the inventory.

If you wish to exclude a directory from the inventory scan, you can specify this exclusion in the Manage NTFS Filter dialog. When you add a directory to this list, all its subdirectories will be excluded from the analysis as well. For example, this is helpful for user profiles or temporary Internet directories.



Summary Page

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



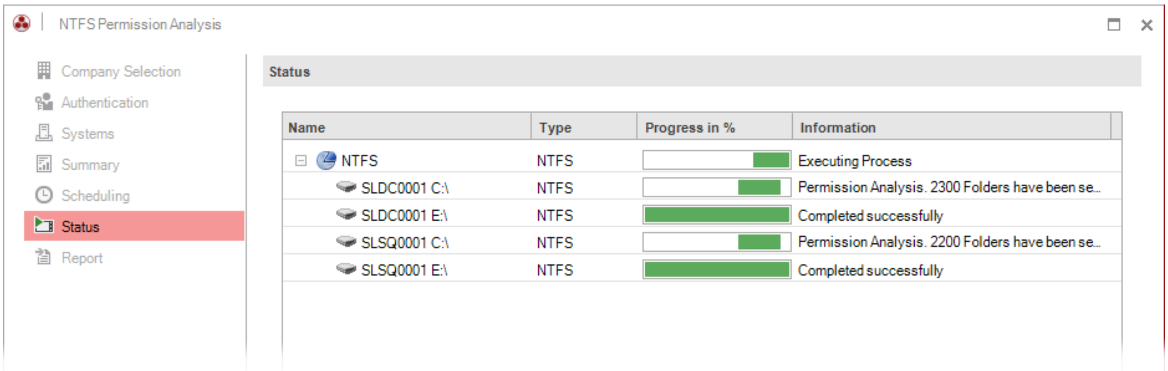
Scheduling

By using the scheduling feature, you can specify a later time for the automatic start of the permission scan. In the scheduling window, you can indicate whether the scan should be performed only once or repeatedly.

In order to use this feature, the Docusnap Server component must be configured on a system in the network.

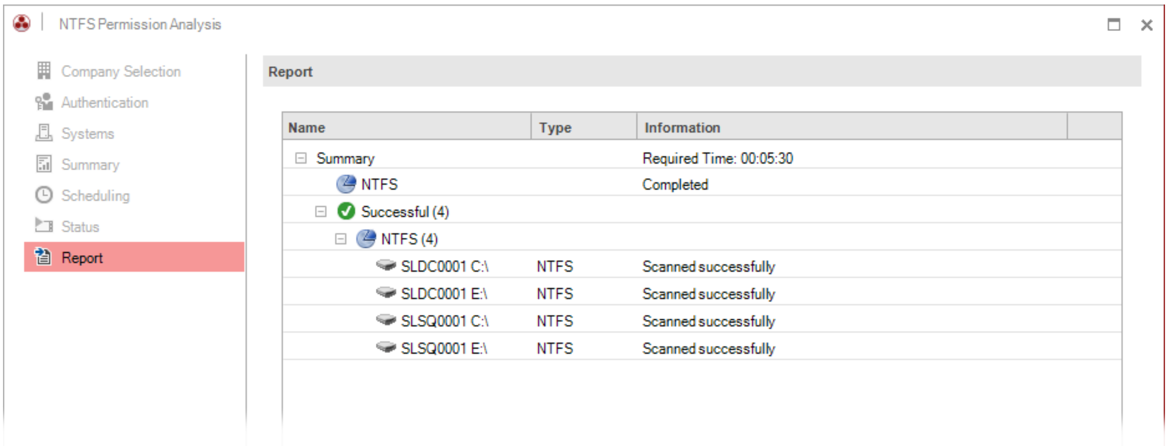
Status

After the process has started, this page will display the progress of the inventory scan. If you wish to abort the inventory process, click the *Cancel* button. The NTFS permissions of all scanned systems with the *Completed* status will be written to the database. Permissions for systems where the scan process has not yet been completed will not be saved.



Summary Page

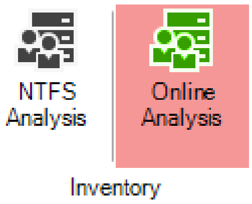
The *Report* page displays how many systems have been successfully inventoried. To exit the wizard, click the *Close* button.



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 *Permissions* ribbon. Just like the normal analysis, the Online Analysis process uses the share permission, user and group data from the database. Only the NTFS permissions and the directory structures will be loaded directly from the network for each item clicked in the hierarchy.



The Online Analysis process allows you to create the tree view without having to execute the *NTFS Permissions* wizard first. In principle, the Online Analysis process works exactly like a permission scan, with the difference that the data will not be stored in the database and only the permissions for the directory that is currently open in the tree view will be scanned. The Online Analysis process will use the credentials of the currently logged-on user. For this reason, the user who has logged on must have the right to access the NTFS permissions for the system.

To enable this feature, click the *Online Analysis* button. When it is enabled, the permissions will be re-scanned from the network as soon as you open directories and subdirectories.

Since the Online Analysis process does not write data to the database, it is not possible to create reports in this mode.

5.3.1.3 NTFS Filter

When performing a permission analysis, Docusnap scans the permissions users and groups on existing directories.

Use the *Manage NTFS Filter* dialog to define which directories should be included or excluded from the analysis.

It is possible to specify directories that should be inventoried, to exclude directories that are not needed in the permission analysis, or to define a combination of included and excluded directories.

The specification to include directories is only used when permissions for certain directories are of interest, for example who has access to directories which contain client data or project information.

Definitions to exclude directories are used to exclude big folder structures like *Windows* or *Program Files*.

The conditions can be grouped and linked with either *AND* or *OR*.

Click the button to add another row. Click the button to delete the current row.

- Operator

In the column *Operator* you can choose between *Contains* or *Not Contains*. Wildcards can be used to specify the selection in greater detail.

- Contains: The specified condition must match the directory.
- Not Contains: The specified condition must not match the directory.

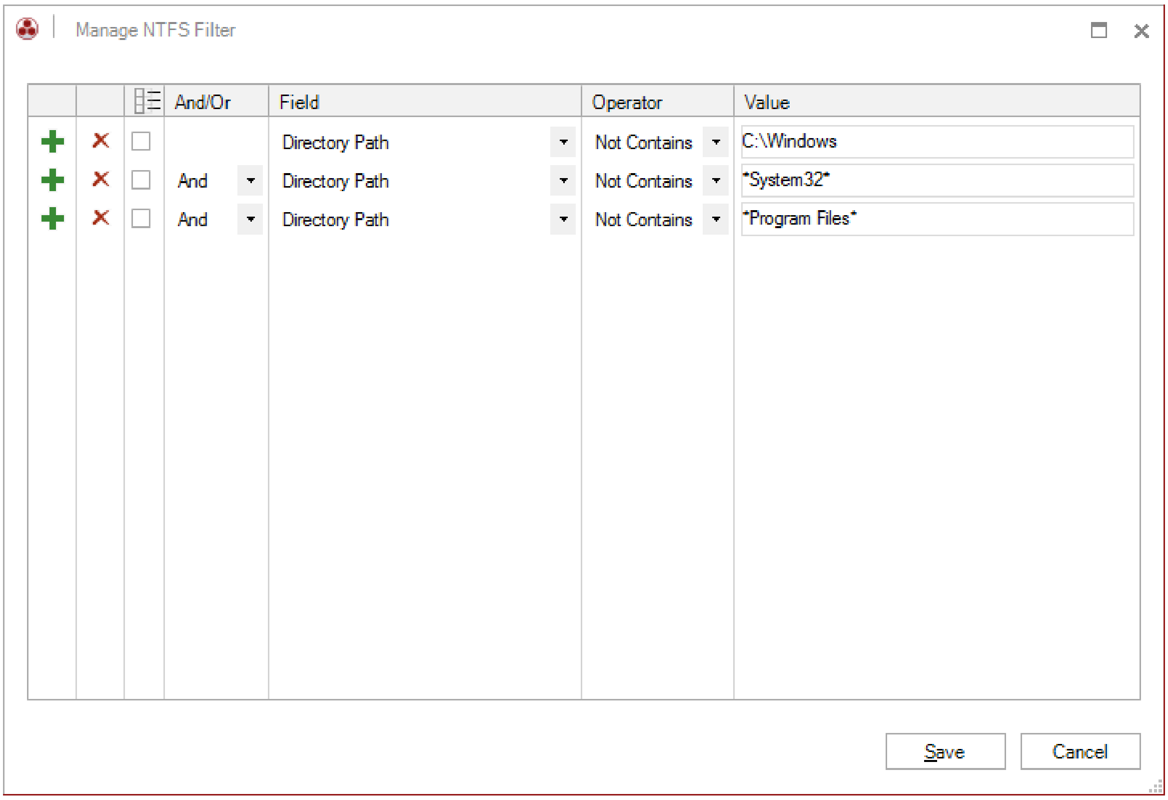
- And/Or

Once several directories are specified, select in the *And/Or* column whether the conditions should be linked with *And* or *Or*. If the terms are linked with *And*, then all conditions have to apply to the directory. If the conditions are linked with *Or*, only one of the terms has to match the directory.

- Grouping

Use grouping to nest the conditions as needed. For example two terms can be linked with *Or* and then be extended with *And* to include another condition. Click the checkbox to select the conditions, then click the button to group the selected entries to one condition. Only conditions listed one below the other can be grouped. The button marks the start of the group. Click the button to revoke the grouping. It is possible to organize the grouping in several levels. Select more than one group and click on the button to group them into one condition.

Click *Save* to apply the settings.

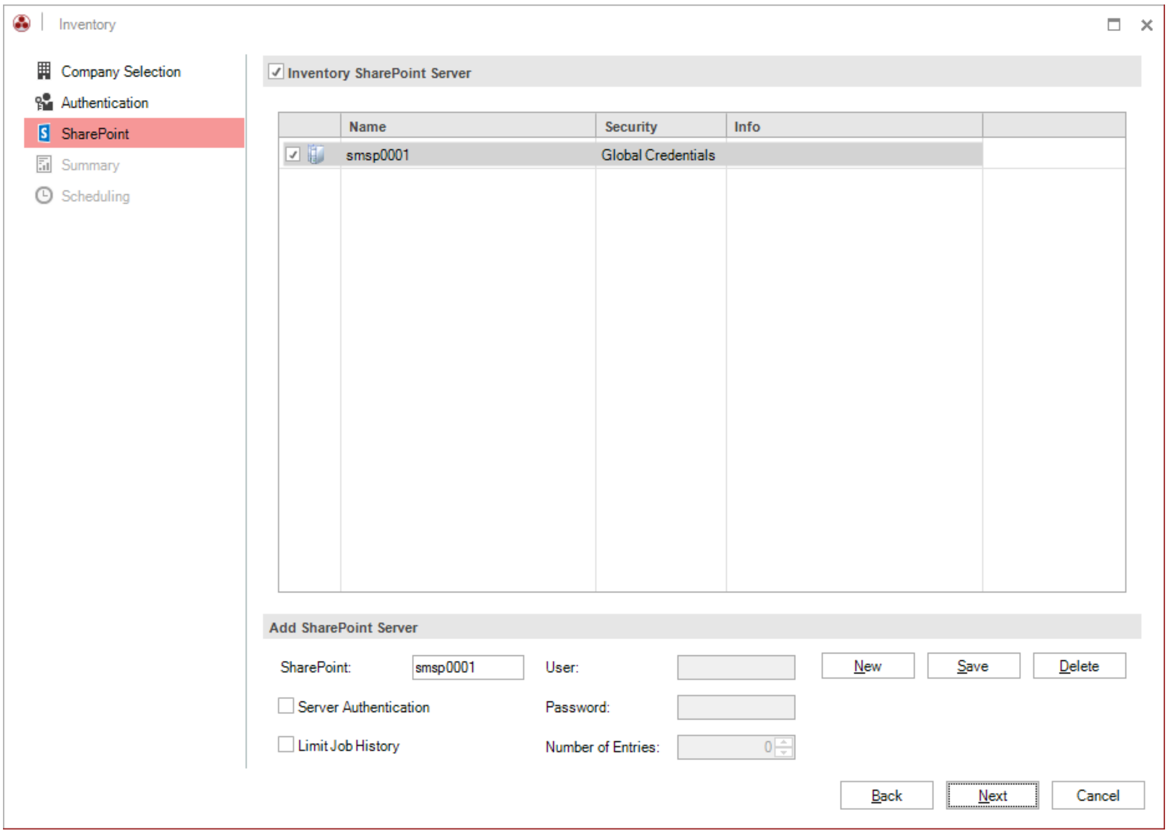


If the full name of the directory is specified, then the time needed for the inventory of the NTFS permissions can be shortened, since these directories can be skipped during the inventory.

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: Basic Steps).

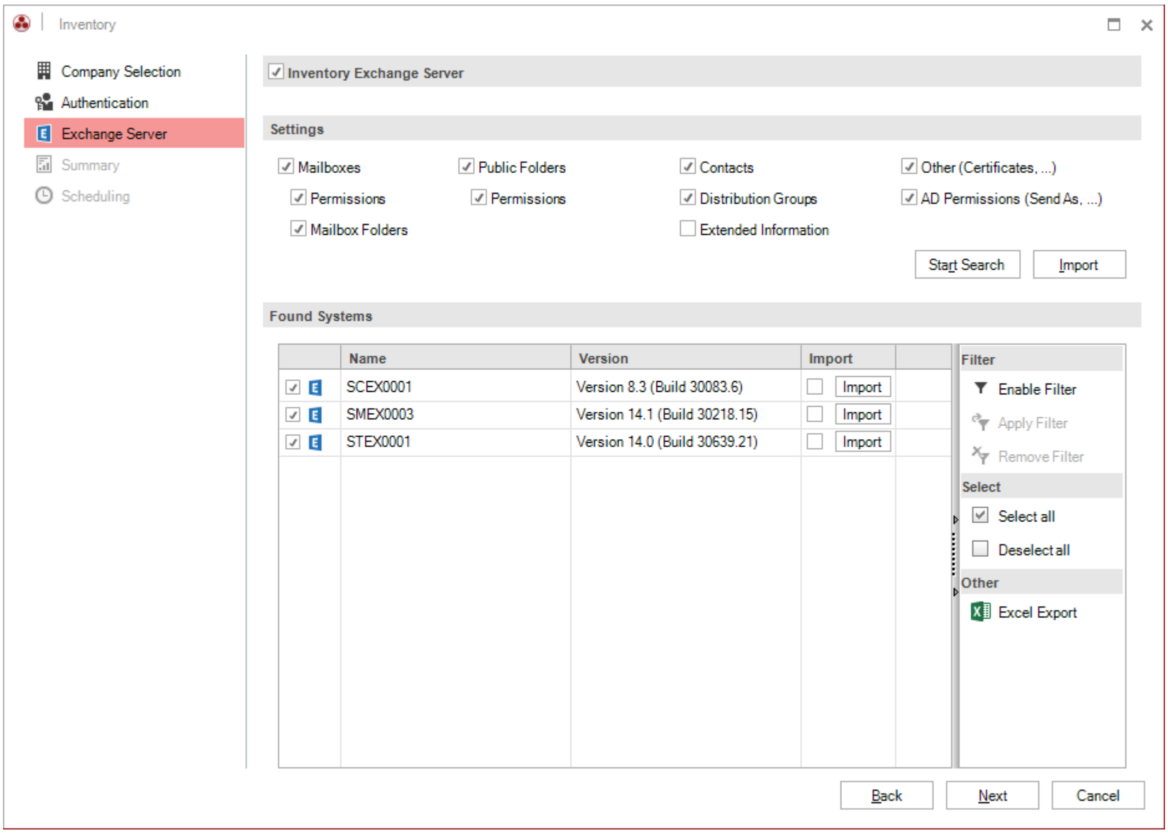


There are two ways to scan SharePoint servers: You can either use *global credentials* for login. In this case, only the name of the SharePoint server is required for the scanning process. Or you log in using *specific credentials*. For this purpose, you need to enable the *Server Authentication* checkbox. 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: Basic Steps). Then, the *Exchange* step will be displayed.



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*

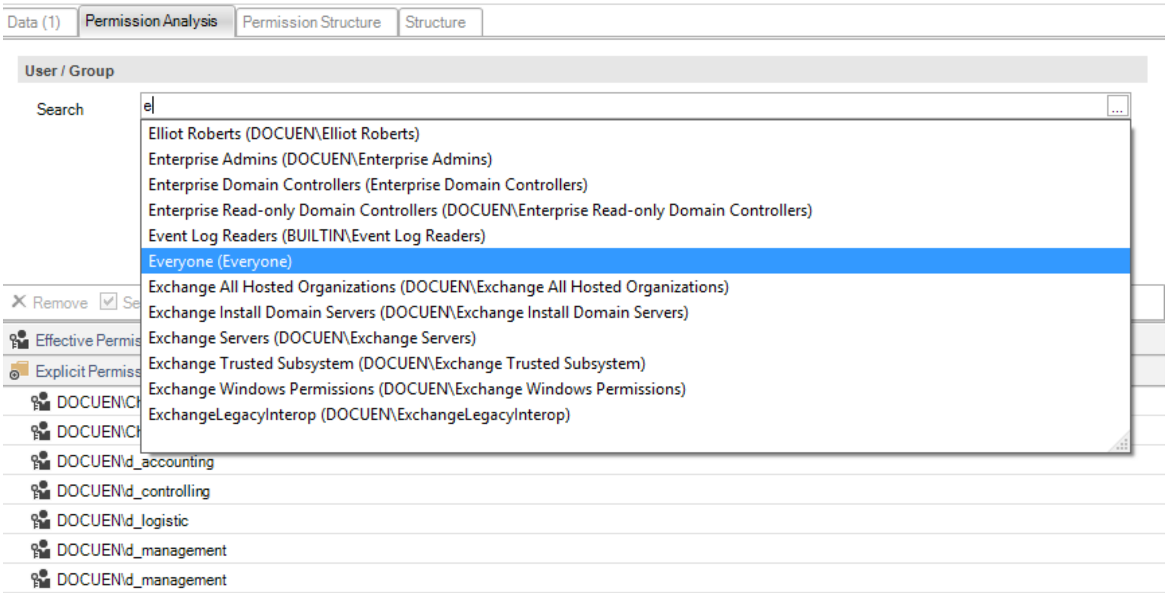
Permissions and the *Share Permissions*.

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.

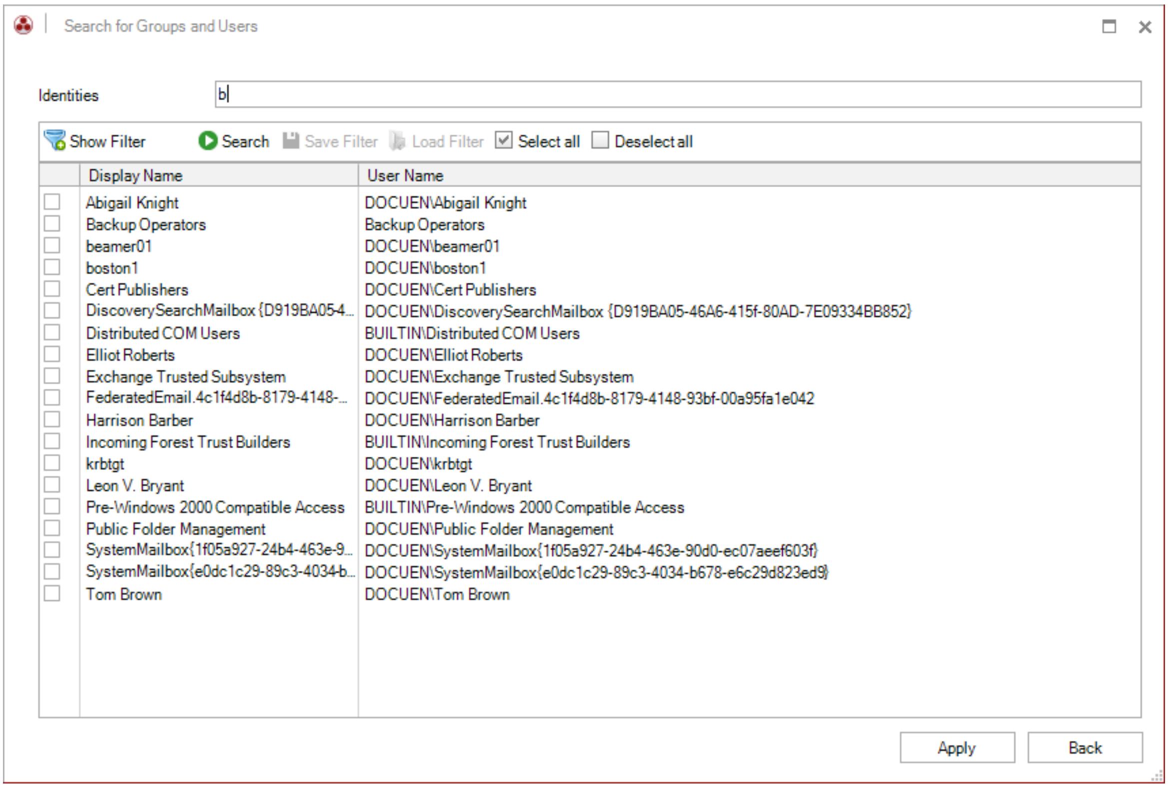
Enter the name of the wanted user or the wanted group. Users are identified by the icon and groups by the icon. Once the first letter is entered, the matching entries are suggested. Users and groups can be added via enter key, selection via the mouse from the suggestion list or via click on the *Add* 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.



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.



Click the *Show Filter* button to open the filter. The filter provides the ability to select users and groups through the definition of one or more conditions.

Click the button to add another row. Click the button to delete the current row.

- Field

The column *Field* lists all ADS properties for users and groups. Depending on the selected property different operators and suggestions are offered. For *User Account Control* the different options like *Account activated* are provided. If the property is a string the first twenty entries are displayed. Subsequently the suggestion list can be filtered by tipping the first letters of the wanted entry. For properties which are a period of time a date has to be given in MM/DD/YYYY or MM.DD.YYYY format. To find users and groups who for example don't have an expiry date, enter as value the word *"never"* instead of a date.

- Operator

The column *Operator* provides several operators.

- Contains: The specified value must be contained in the properties of the user or the group.
- Not Contains: The specified value must not be contained in the properties of the user or the group.
- Starts with: The value of the user or group must begin with the specified value.

- Ends with: The value of the user or group must end with the specified value.
- =: The value of the user or group has to match the specified value exactly.
- <>: The value of the user or group must not match to the specified value.
- <=,>=,<,>: The value of the user or group has to be less than or equal (<=), greater than or equal (> =), less than (<) or greater than (>) the specified value.

▪ And/Or

Once several conditions are specified, select in the *And/Or* column whether the conditions should be linked with *And* or *Or*. If the terms are linked with *And*, then all conditions have to apply to the user or the group. If the conditions are linked with *Or*, only one of the terms has to match the user or the group.

▪ Grouping

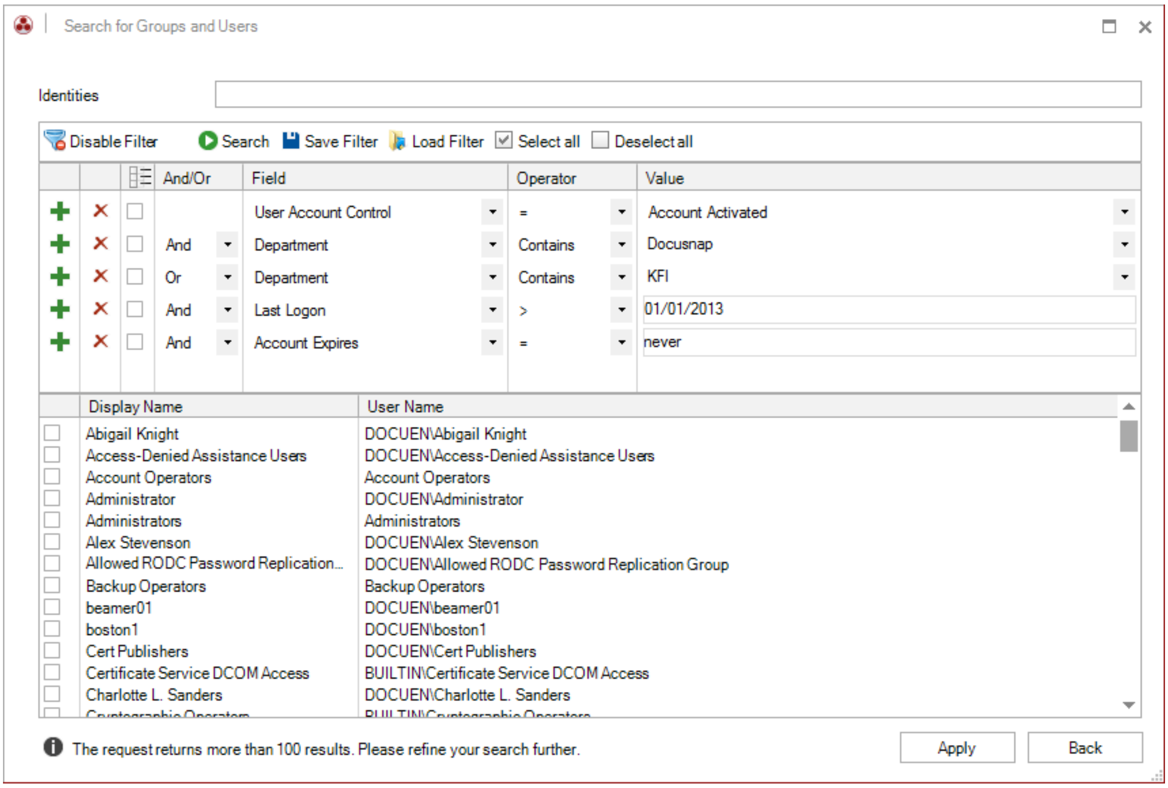
Use grouping to nest the conditions as needed. For example two terms can be linked with *Or* and then be extended with *And* to include another condition. Click the checkbox to select the conditions, afterward click the button to group the selected entries to one condition. Only conditions listed one below the other can be grouped. The button marks the start of the group. Click the button to revoke the grouping. It is possible to organize the grouping in several levels. Select more than one group and click on the button to group them into one condition.

Click the *Search* button to list the users and groups who match the specified filter.

If a term is entered in the *Identities* text box, then the users and groups are filtered by this search term and the specified conditions.

Click the *Save Filter* to save the specified conditions in an XML file. When the *Advanced Search* is opened the next time, click the *Load Filter* button to recover the conditions from the XML file so they don't have to be defined again.

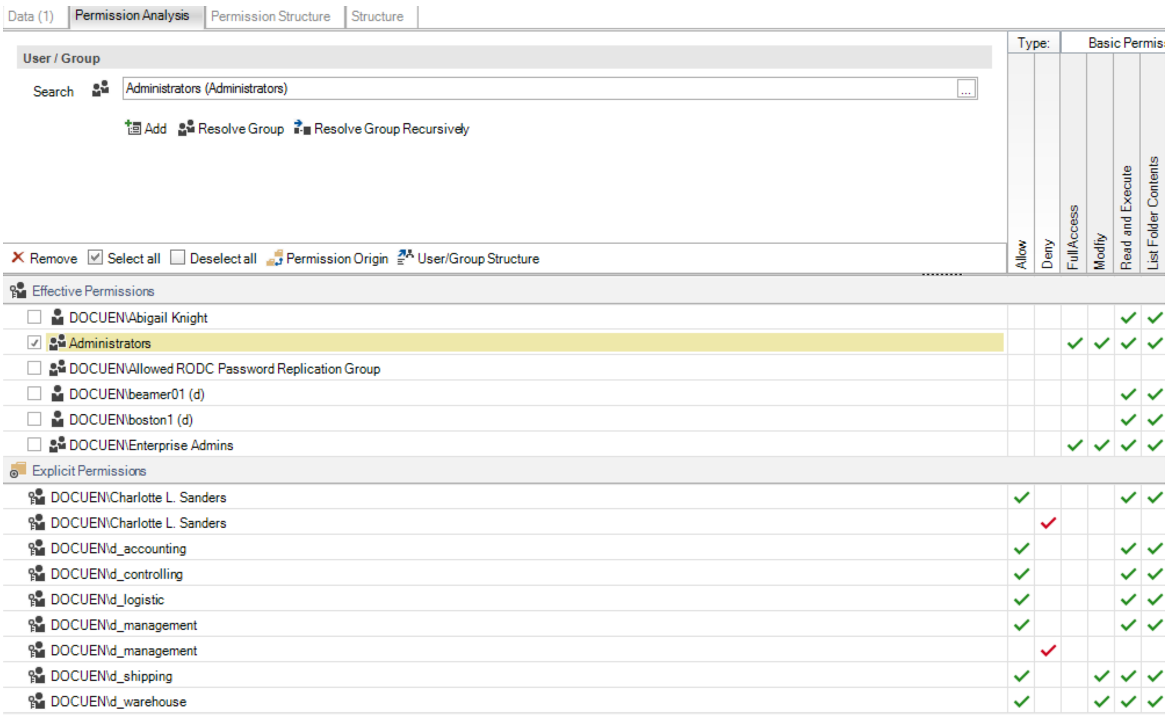
Select the wanted entries with the according checkbox and click the *Apply* button to add the users and groups.



Afterwards all added users and groups are listed in the *Selected User/Groups* field. Click the *Apply* button to add the users and groups below the *Effective Permissions* heading and display their associated permissions to the selected directory.

When a different node is selected, the users and groups will not be deleted. The effective permissions will be recalculated for the selected node and the selected users or groups. The users and groups are only deleted if you select a node from a different company since the selected users and groups are not part of this company. Click the *Permission Origin* button to display the analysis of the permissions for the selected user or group. To display the group memberships of the selected user or group click the *User/Group Structure* button.

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



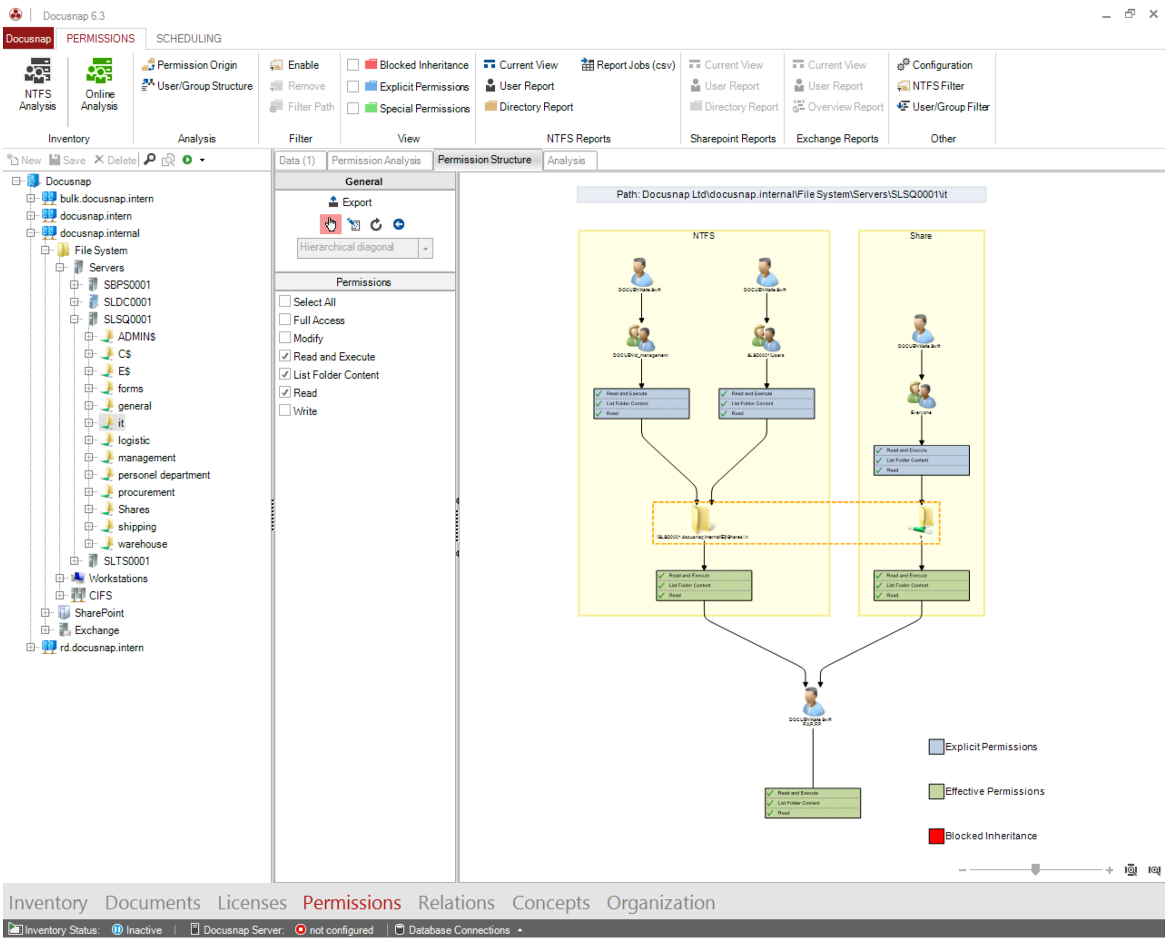
Filters

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.

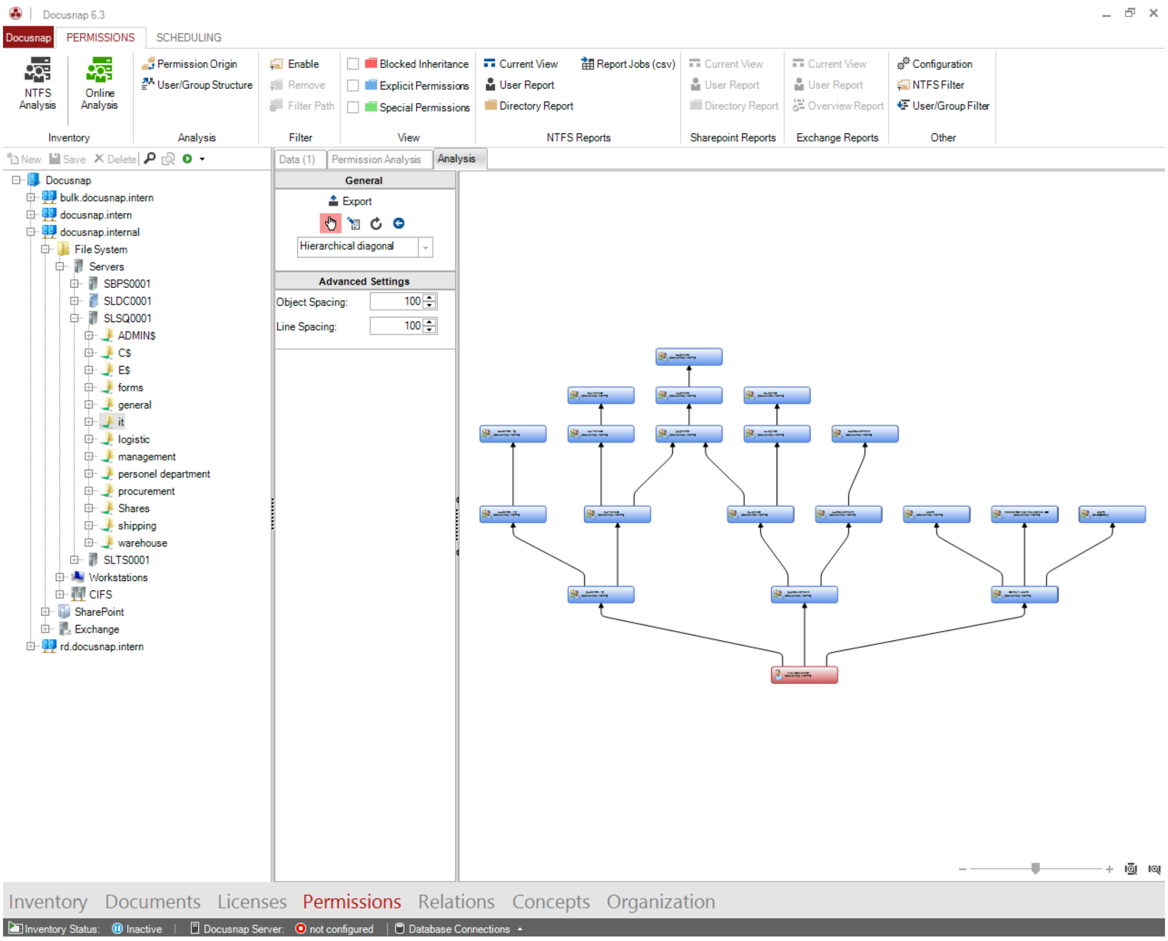
5.4.2 Analysis Diagram

The *Permission Analysis* tab displays the effective permissions for the selected user or group. Effective permissions consist of various permissions, such as NTFS and share permissions, explicit permissions and inherited permissions. In the diagram, you can see how a user or group obtained a certain permission.

Click the *Permission Origin* button to open an additional tab where the origin of the permission of the selected user or group is displayed. This button is available on the ribbon and on the *Permission Analysis* tab.



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



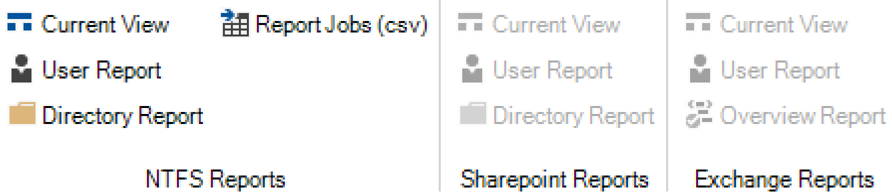
5.4.3 Determining the Effective Permissions

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 Report*, *Directory* Report or *Overview Report* to open the wizard to generate the reports.

To create the user reports at least one user or group has to be selected in the *User Selection* before opening the wizard.



The selected node will be used as the starting point.

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.

When calculating the effective permissions the share and NTFS permissions are used, taking into account the inheritance of permissions. By selecting the checkbox *Ignore Share Permissions*, only the NTFS permissions are analyzed.

By enabling the *Show Only Changes* option, you can significantly reduce the resulting number of report pages and thereby improve the readability of the report

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.

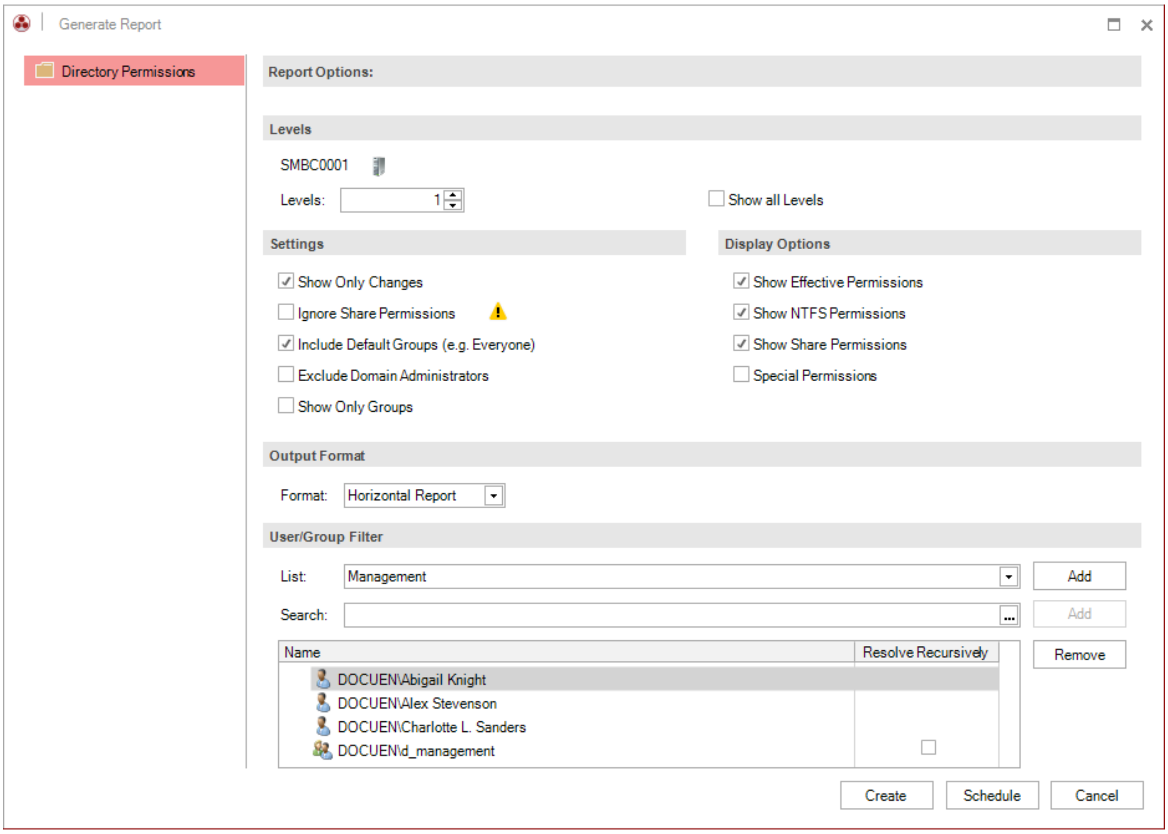
For the user, directory and overview reports three different output formats are provided.

- 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 Path\Company\Domain\Starting Point\Reports\EffectivePermission)

With the *User/Group Filter* users or groups can be excluded from the directory report. This can be useful, for example, so users and groups, that are not of interest, or who have access to all directories, are not listed in the reports. In the *List* combo box defined lists of users and groups can be added. These are compiled in User/Group Filter dialog. Click the *Add* button to add the users and groups of the selected list. Via the *Search* text box, users and groups can be added individually. Once the first letter is entered, the matching entries are suggested. Users and groups can be added via click on the *Add* button. Click the ... button in the *Search* text box to open the *Advanced Search* dialog. The selection of users and groups in the advanced search works the same way as when you add the user for the analysis of the effective permissions. For groups you can select via the *Resolve Recursively* checkbox, if only direct users of this group should not be considered or if the users of the subordinate groups will also not be listed in the reports. Click the *Remove* button to delete a currently selected entry.

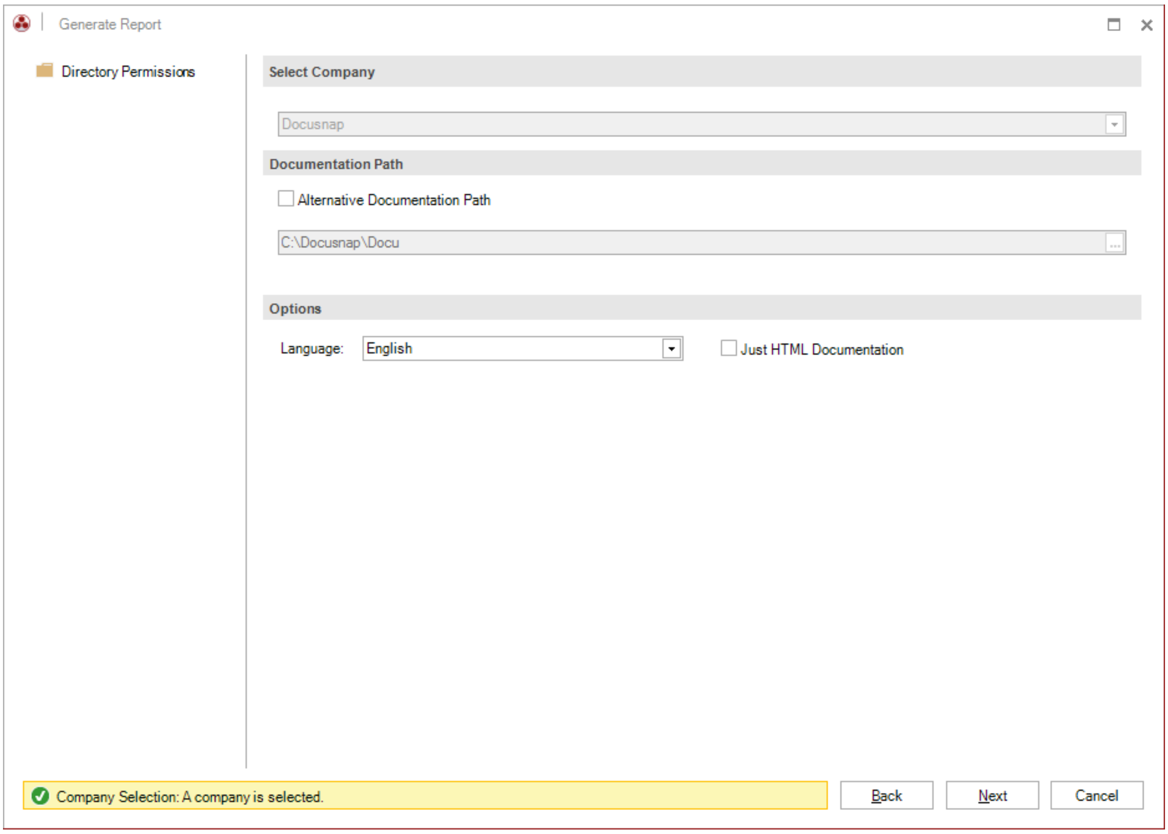


The report may be exported to various file formats. Click the *Export* button on the *Reporting* ribbon and select the desired format. Clicking the desired format opens a dialog where you can select the pages to be exported. Click the *+* sign to expand the Settings group. Then, you can select format-specific settings. If the file should automatically be opened after the save, enable the *Open After Export* checkbox.

Scheduling

With Docusnap, you can schedule the creation of reports and have them generated automatically at a later point in time.

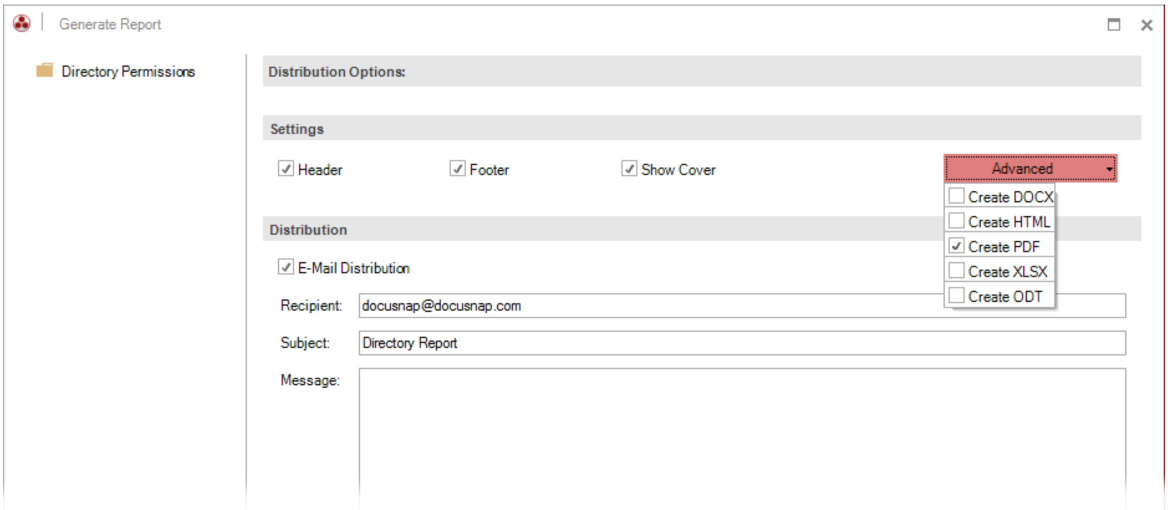
Click the *Schedule* button to open the next step. In case you do not want to create the report using the predefined directory (documentation path), specify an alternative path. By default, the documentation path defined for the Docusnap Server will be used. If you specify an *alternative documentation path*, that path will be used. In addition the language can be chosen.



In the next step, you can select the desired report format. The following formats are available: docx, xlsx, html, odt and pdf.

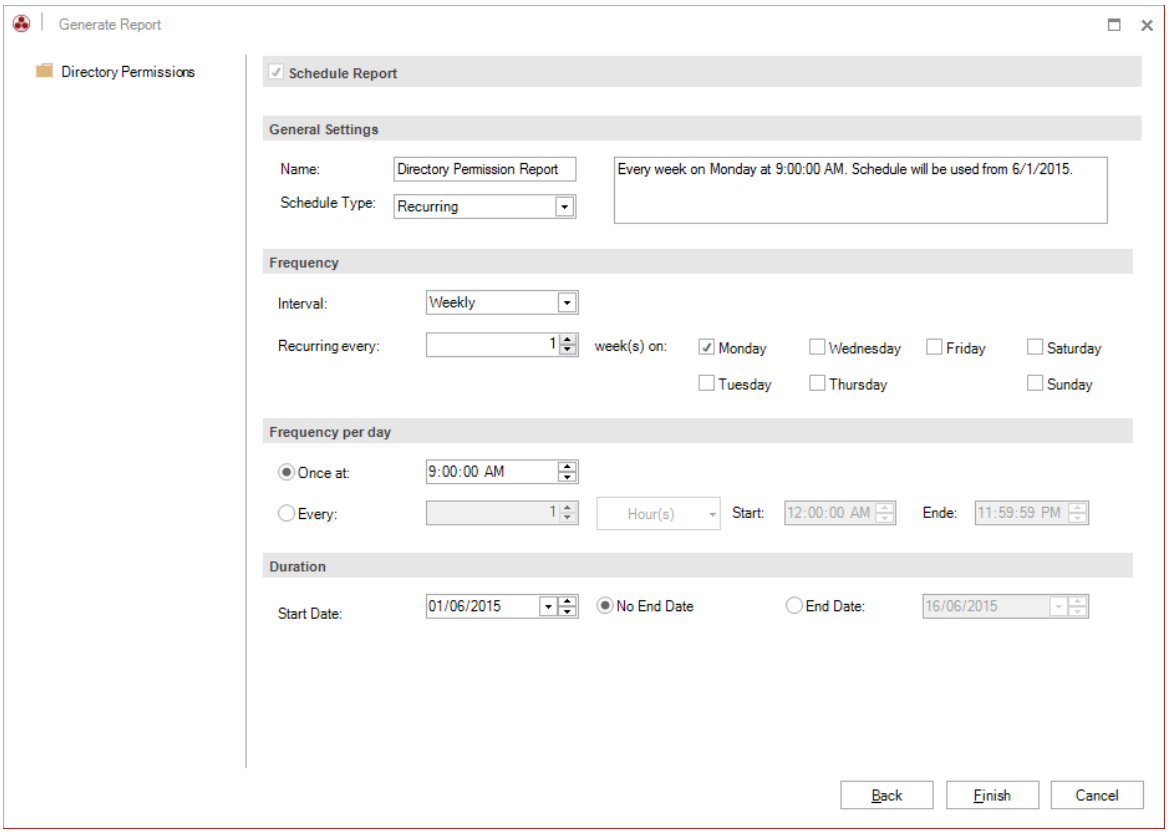
Additionally, you can specify here whether to include a cover page, a header and a footer in your report. If you do not make any changes, the settings from the *Layout (CI)* dialog will be used.

If you tick the *E-Mail Distribution* checkbox, the report will be sent to the e-mail address(es) specified below. Even if *E-Mail Distribution* is enabled, the reports will always be saved to the specified *documentation path*.



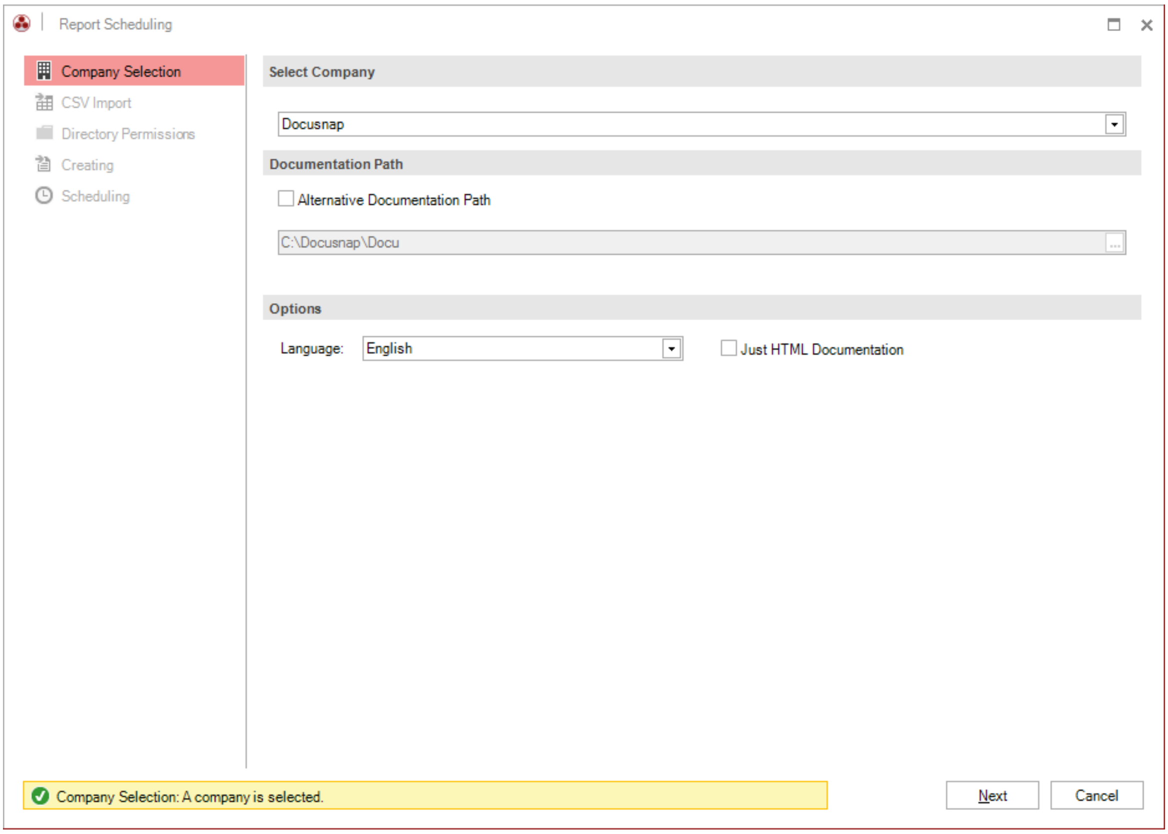
In the last step, you can define scheduling details. This step determines when and how often the report will be created. Click the *Finish* button to save the task.

Scheduling will only work if the Docusnap Server service has been set up.



Report Jobs

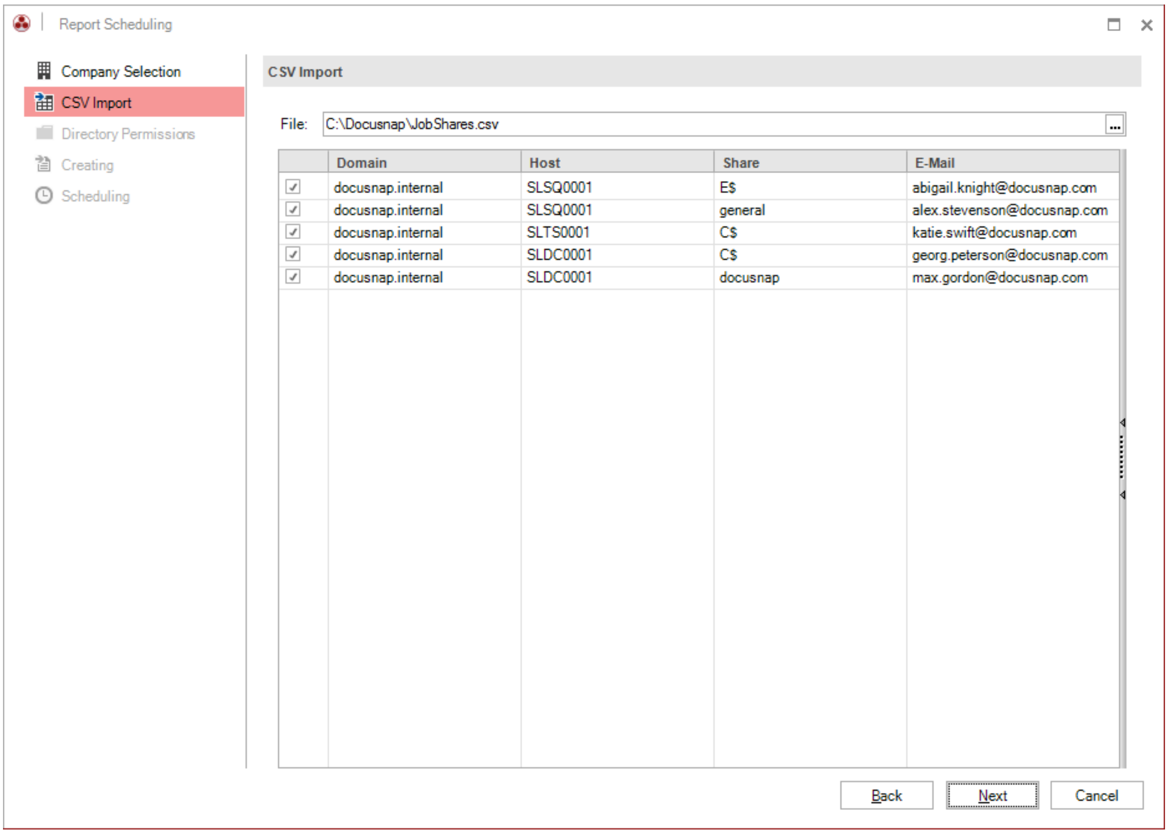
Additionally it is possible to schedule the Directory Report for several shares simultaneously and send it to a defined e-mail address. Thereby a CSV file is imported where the desired shares are listed. Click the *Report Jobs (csv)* button to open the wizard. Select the company in which the shares are located. In addition, an alternative documentation path and the language can be selected.



In the next step, the CSV file is imported. In the CSV file the values for *Domain*, *Host*, *Share* and *E-Mail* must be listed in that order separated by ";". For example:

```
docusnap.internal;SLSQ0001;E$;abigail.knight@docusnap.com
docusnap.internal;SLSQ0001;general;alex.stevenson@docusnap.com
```

For each entry is checked whether the share was inventoried for the specified host in the specified domain. The report can only be scheduled, if the directories and permissions for the specified share are available. When executing the job the report will be sent to the specified email address. If no email address is specified, the report will only be saved in the specified documentation path. Check the respective checkbox to select the shares for which a task should be created. The CSV file can be created and edited using Excel or a text editor.



Click the *Next* button to switch to the *Directory Permissions* step. In this step, the options for generating the report are selected which have already been described in this chapter. After the format of the report and the subject for the email are defined in the *Reporting* step, you can define in the step *Scheduling* when the jobs should be executed. Click the *Finish* button to create a job for every selected share, which will be executed at the scheduled time.

5.4.4 User/Group Filter

The directory report lists all users or groups, which have a permission to a specific directory. In the *User/Group Filter* users and groups can be defined that are to be excluded from the report. After that, the defined lists are displayed in the wizard and can be selected.

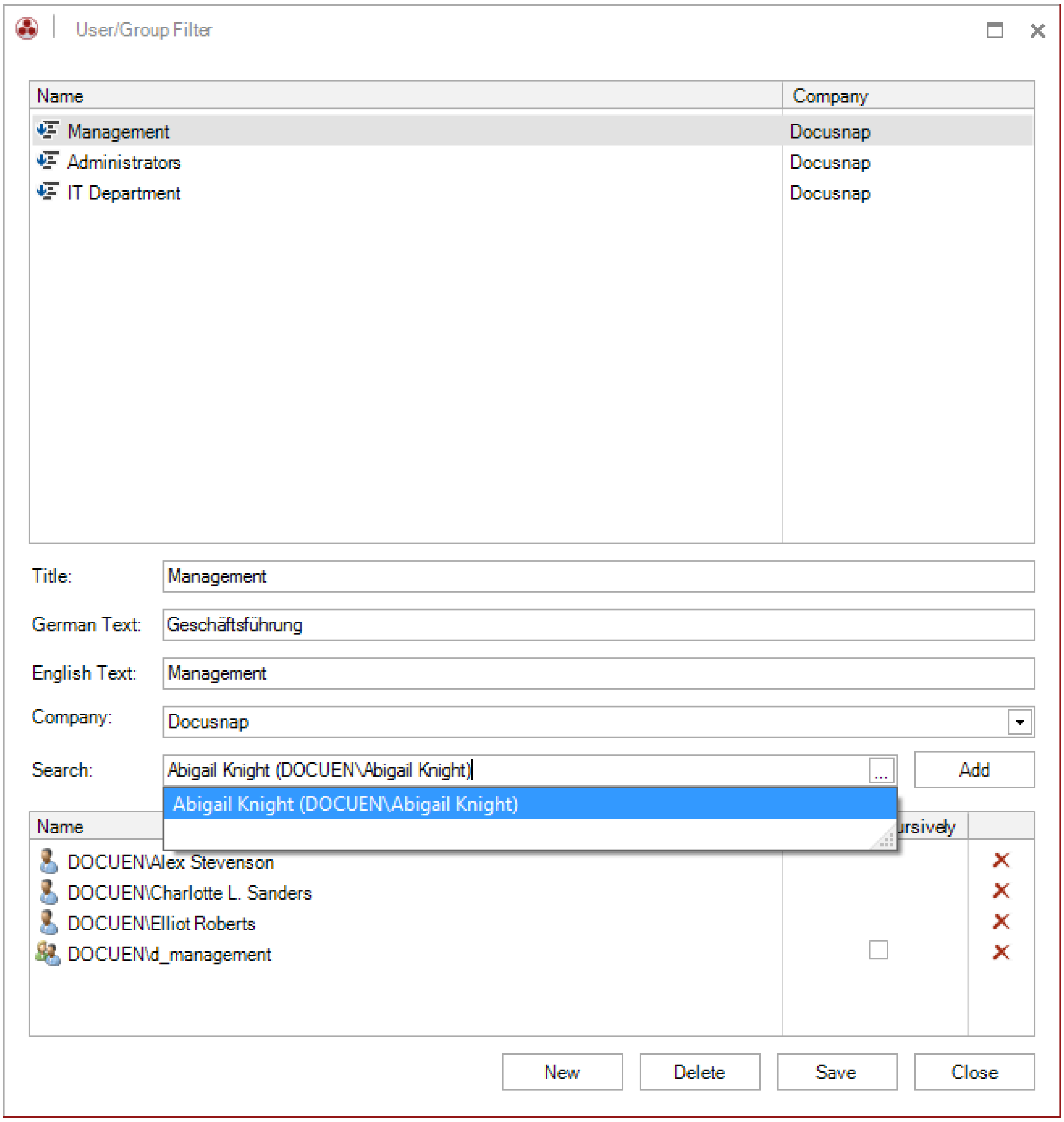
Click the *User/Group Filter* button in the *Permissions* ribbon to open the *User/ Group Filter* dialog. Via the *New* button a new list is created. For every list a title and a designation in English and in German is required. Select in the Company list field, the company for which the list of users and groups should be defined. Enter the name of the wanted user or the wanted group in the *Search* text box. Once the first letter is entered, the matching entries are suggested. Users and groups can be added via click on the *Add* button.

Click the ... button in the *Search* text box to open the *Advanced Search* dialog. The selection of users and groups in the advanced search works the same way as when you add the user for the analysis of the effective permissions.

For groups you can select via the *Resolve Recursively* checkbox, if only direct users of this group should not be considered or if the users of the subordinate groups will also not be listed in the reports.

Click the × button to delete the respective entry.

Click the save button to save the new list or the changes.



The users and groups that should be excluded, can also be defined in the *Directory Permissions* wizard. If the same users and groups are excluded regularly from the report, the user/group filter offers the advantage that the list must be only defined once.

5.5 Configuration

Settings for the execution of the inventory of permissions can specified in the *Configuration - Permission Analysis* dialog. Click the *Configuration* button in the *Permissions* ribbon or the *Permission Analysis* button in the Docusnap Menu to open the dialog.

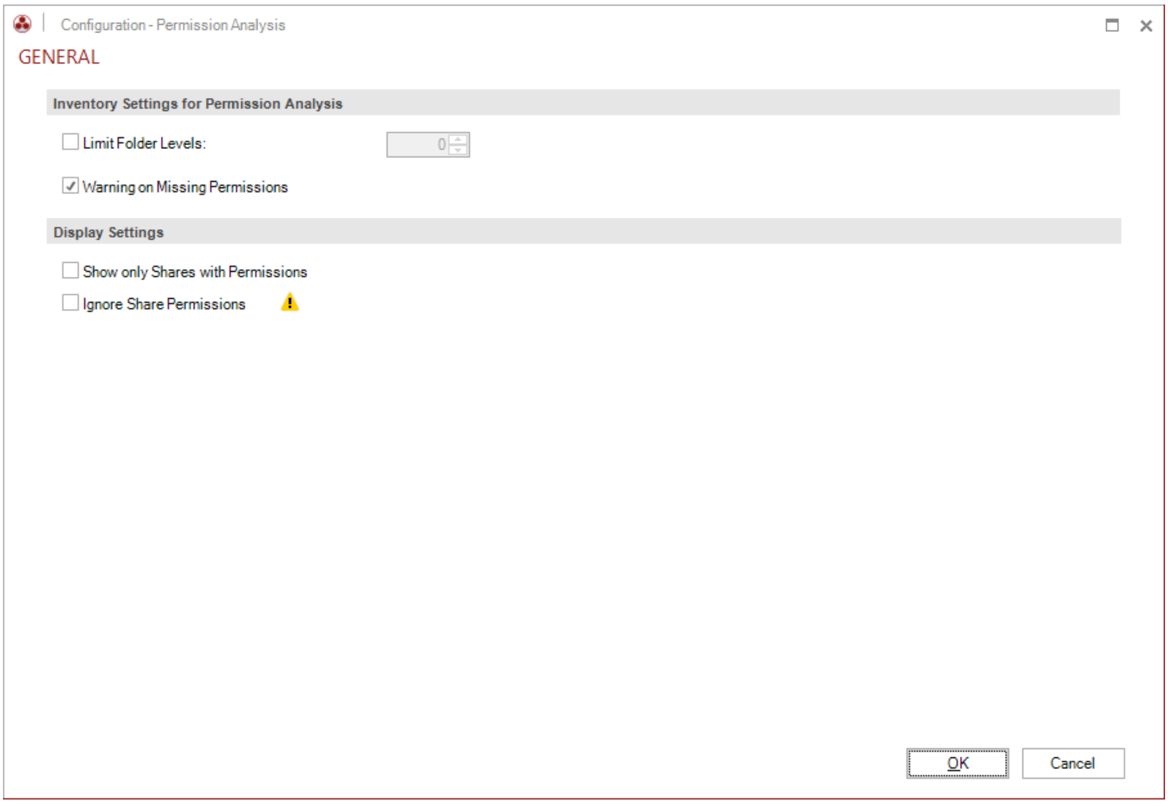
General

When performing the inventory scan of NTFS permissions, the system will read the permissions of all folders on the selected systems. The *Limit Folder Levels* option allows you to specify the number of folder levels to be scanned. This can be helpful if, starting with a certain level, the permissions are always inherited.

Through the check box *Warning on Missing Permissions* you can determine whether warnings should be displayed for the NTFS inventory.

When the checkbox *Show only Shares with Permissions* is checked, only shares, for which permissions exist, are displayed in the Permission tree view.

The option *Ignore Share Permissions* means that no analysis of the effective access permissions takes place. Only the explicit NTFS permissions are analyzed.



Part VI

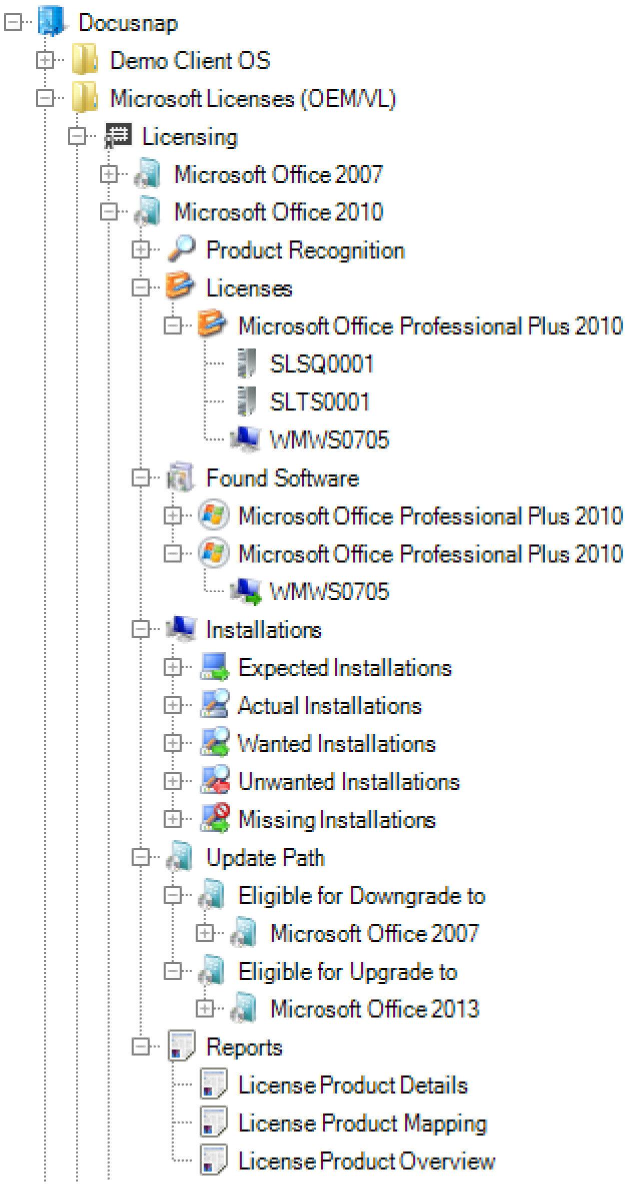
6 License Management

The Docusnap License Management allows you to enter the license agreements for purchased software based on the respective licensing model. Docusnap then associates the installed software base with the license agreements and detects any over-licensing or under-licensing situation. Docusnap is able to map all common variants of licensing models, such as per-device, per-user, per-processor, and per-core licensing. Of course, this also allows for upgrading and downgrading as well as for terminal server licensing. Comprehensive features which are suitable to map nearly all use cases relevant to licensing are available, all evaluations being performed at the company level. Some selected examples for such evaluation options will be given in a separate section.

The dataset on which License Management is based consists of the software found during the most recent Network Scan of the systems inventoried in the network. All software installations found will be considered, regardless of the device type or the installed operating system, provided that they have been enabled in the License Management options. In addition, all installations found through the Software Search process, as well as manually entered software products will be included in the License Management evaluations.

Basically there are two ways how the software products are assigned to licensing. Docusnap provides a list of installed software products for which a license can be created. In license management wizard, these products can then be assigned to licensing. As a result all installations of this software product are counted for this licensing. Alternatively you can also use search words. These keywords help you to determine the Software Products found on the inventoried systems. This means that, e.g., different versions of the same software product can be easily covered just by specifying appropriate keywords. An in-depth explanation of the use of keywords and the possibilities they offer will be given in the description of the License Management wizard.

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



- Company: As in the Data Explorer, 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 example according to 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 a particular group independently from the products in the remaining groups.
- Licensing: 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 devices or users a license has been issued for are located below each license.

- Product Recognition: In the product recognition all directly assigned software products are listed.
- Update Paths: 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 separate section. The Undesired Products node represents a special issue regarding software that should not be found on the target systems. The License Management module provides many comprehensive evaluations in the form of reports.

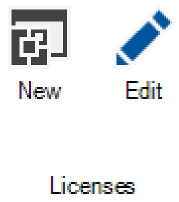
6.1 General

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

Licenses

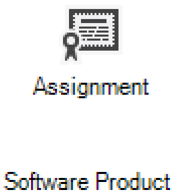
Clicking the *New* button will start the License Management Wizard. The desired license can be created using this wizard.

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



Software Product

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



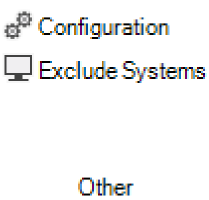
Definition

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.

Other

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

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

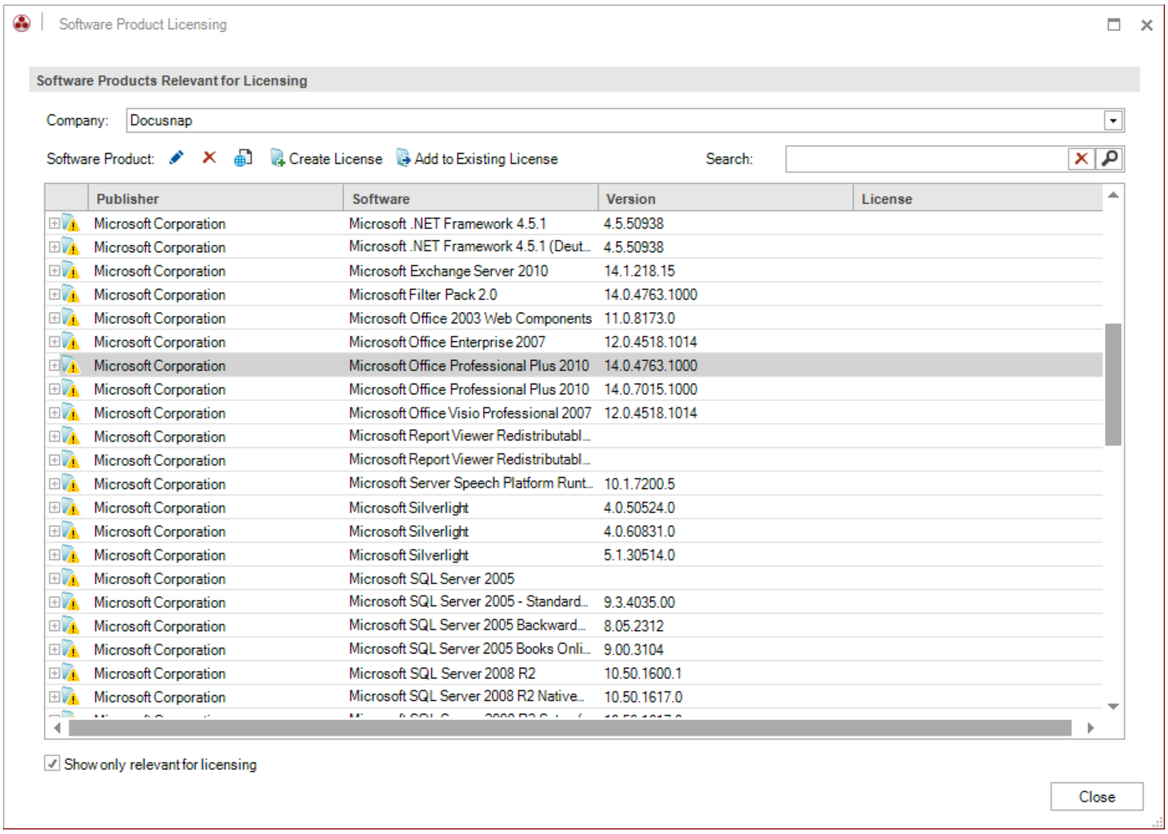


Edit

In general, you can create and edit software products by using the License Management wizard. It is possible to edit existing software products with the Editor tab. Make sure to restrict manual edits to minor changes.

6.2 Software Product Licensing

Click the *Assignment* button in the *Software Product* group to open the *Software Product Licensing* dialog. This dialog lists all software products with the respective versions, which were found at least once on an inventoried system and are not yet assigned to a license.



- Company: Use the *Company* combobox to select the company from which the software products should be listed.
- Edit Software Product: Click the button to open the currently selected software product for editing. To edit multiple software products simultaneously select the respective software products, by using the Ctrl or Shift key and clicking on the software products. Then click on the button to open the dialog for editing all of the selected software products.
- Delete Software Product: Software products can be deleted, but only products which were not found with the latest inventory. If the product is, however, still installed, it will be found again at the next inventory and re-entered in the list. Click the ✕ button to delete the selected software product.
- Look up Software Product: By clicking on the button the selected software product is looked up on the Web.
- Create License: By clicking on the *Create License* button the license management wizard opens. The name of the currently selected software product is used as a

descriptive name.

- Add to Existing License: By clicking the *Add to Existing License* button, a dialogue with all already created licenses opens. All selected software products will be assigned to the licensing selected in the dialog.
- Search: In the textbox for the search, a search term is entered, which is then compared with the manufacturer, the software and the version. Then all software products which contain this term are displayed.

If you click the ⊞ button all systems on which this software product is installed are displayed.

To also list software products for which a license has been created, the checkbox *Show only relevant for licensing* must be deactivated.

6.3 License Management Wizard

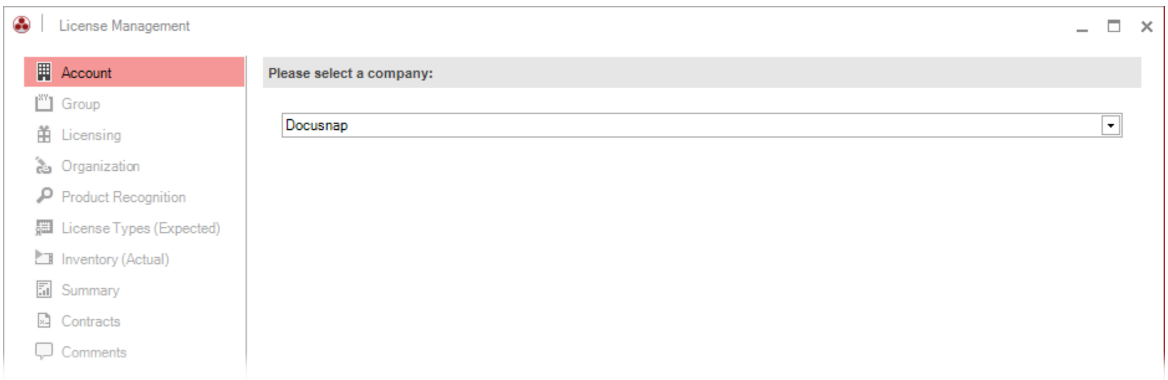
The easiest way to create new software products or to edit existing entries in the License Management module is by using the *License Management* wizard. The wizard for creating a new license can be opened in the *Software Product Licensing* dialog for software products or on the *Licenses* ribbon by clicking on the *New* button. If a software product or a node at a level below it is selected in the tree view, you can click the *Edit* button to open that software product for editing in the *License Management* wizard.

Depending on the selected options, the License Management Wizard features a varying number of steps.

6.3.1 Company

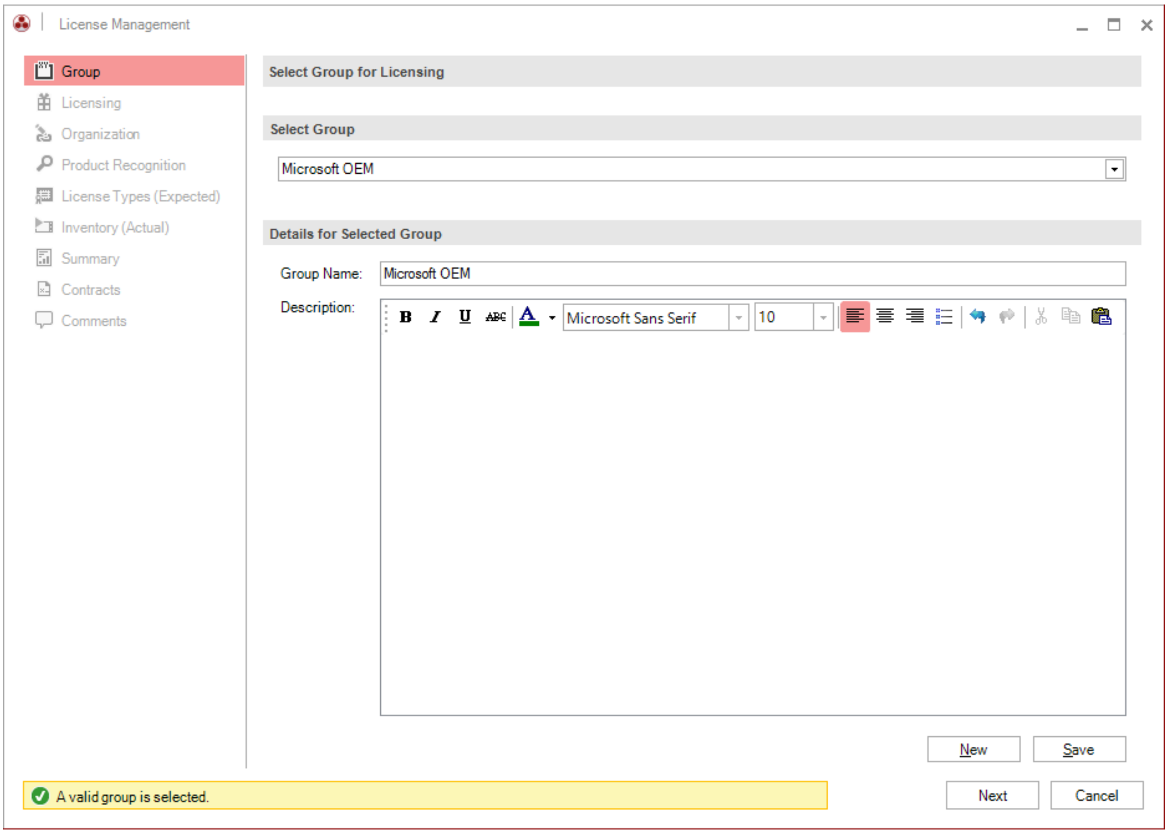
If the *License Management* wizard is started by clicking on the *New* button a company must be selected for which the licensing should be created. When the wizard was opened with the Software Product Licensing dialog, no company needs to be chosen because the company was already defined in the dialog.

Since all evaluations in the License Management module are performed at the company level, the selection determines which data will be available in the wizard.



6.3.2 Group

Each software product must be assigned to a specific group. The software groups ultimately help with the ability to present and evaluate the whole catalog of inventory clearly and enable detached consideration of products in separate groups. Either an existing group may be selected, or a new group created, during this step. The fact that a new group will only be saved after the successful completion of the License Wizard should be kept in mind. In the event that the License Wizard is terminated, a newly created group will be lost. Aside from this, several groups can be created at the same time during this wizard step, however a software product may only be assigned to one specific software group. Each group name must be unique for each company, in order to avoid confusion.



6.3.3 Licensing

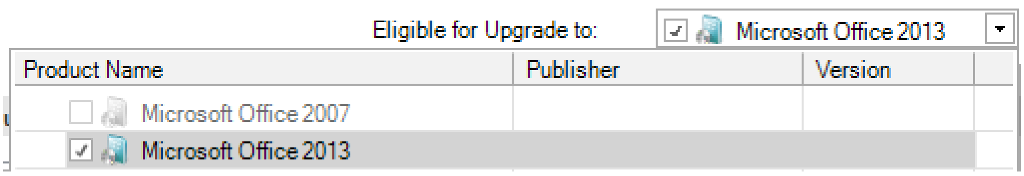
In this step, you can define the software products, which are at the core of the Docusnap License Management, by specifying their most important attributes. For identification, the product name, the publisher and the version are used, similarly to the information Docusnap collects when automatically inventorying the software on the scanned computers. You must enter the product name here. Details about the publisher and the version are optional, but specifying them is highly recommended as they help to generate meaningful evaluations. However, the values entered here are only used for display in the program and in the evaluations. They do not affect the analysis procedures in any way.

Every software product is assigned to a specific category. 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 keywords and define system assignments or user assignments in later wizard steps. Use the Docusnap Management to add software categories or edit existing ones. 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 number of used licenses manually. With the license category *Devices and Users (manual)* it is possible create licenses for devices and users. The device licenses are used for calculating the license balance, the user licenses are listed additionally.

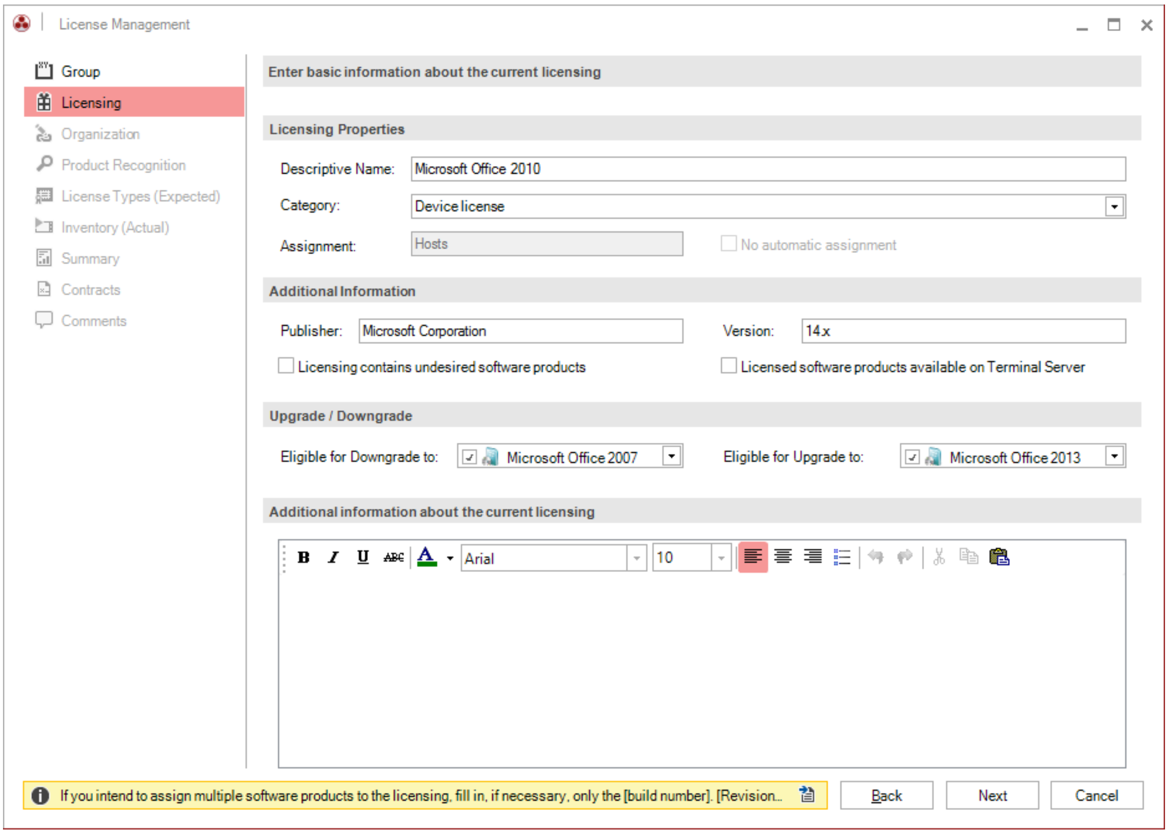
In addition to the general data about the software product, you can specify here whether it is an undesired software product or whether the software is hosted on a terminal server. Undesired software products are displayed under a separate node in the License tree structure, allowing a quick overview. They may later be evaluated separately. This topic will be discussed further in a separate section.

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 2010 that it is an upgrade from MS Office 2007 and a downgrade from MS Office 2013. If multiple downgrade versions of a particular software product exist, you can easily select the ones relevant to your company 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.



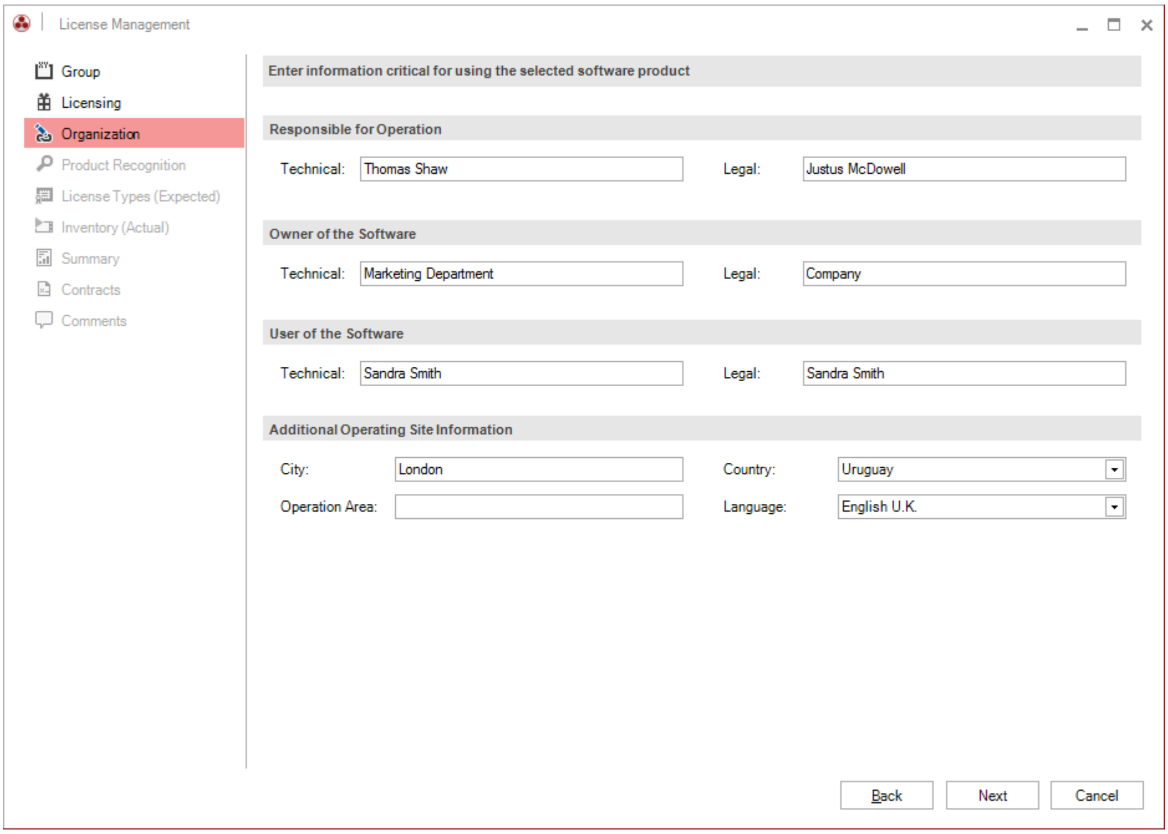
You can also specify additional information on the current software product, i.e. details for which not dedicated entry or selection fields are available. As with other descriptive fields, you can enter any desired text here. This can be, for example, special licensing conditions, instructions for use or notes about the licensing method used in the company. This is also the place where you can enter crossreferences to other products or information from the software vendor.



6.3.4 Organization

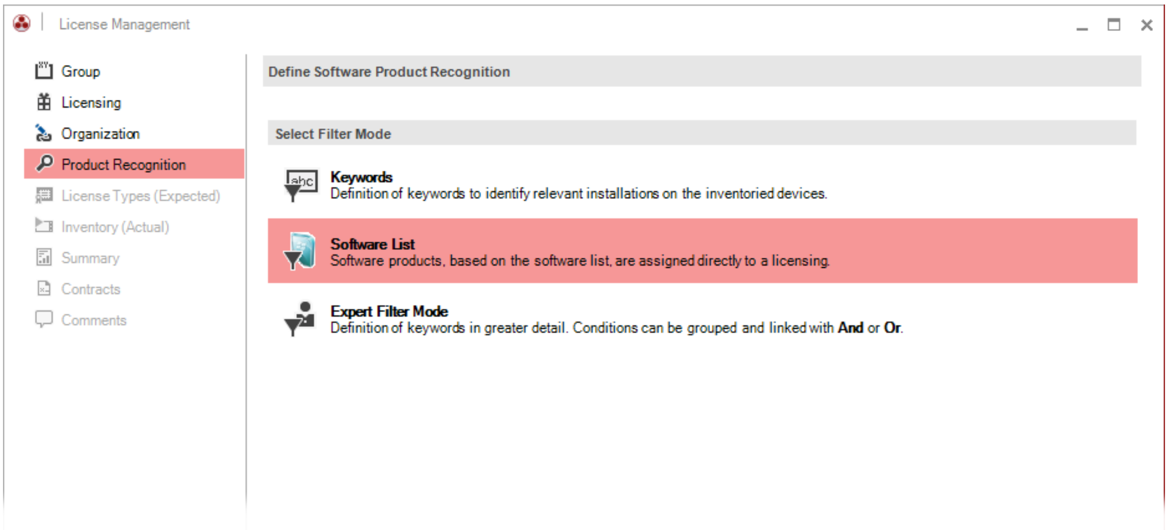
The next step of the *License Management* wizard allows you to enter additional information about the current licensing. These entries will be displayed in reports. Thus, for example, the persons or groups responsible for the software as well as the operation area and the language setting for the software can be entered here.

All entries on this wizard page are optional. If this information is not required, you can leave the fields empty. The data on this page is used for display only and does not affect the way Docusnap determines the license balance.



6.3.5 Product Recognition

The Docusnap license management offers several options to determine the number of needed licenses. The number of licenses can be calculated on one hand by defining search words to determine the software products, on the other hand by assigning software products via the software list directly to a license or by using the advanced filter mode.



Keywords

For the license evaluation keywords can be defined in order to determine respective installations on the inventoried systems. The almost unlimited combination of keywords lets you adjust the keywords individually to each and every situation.

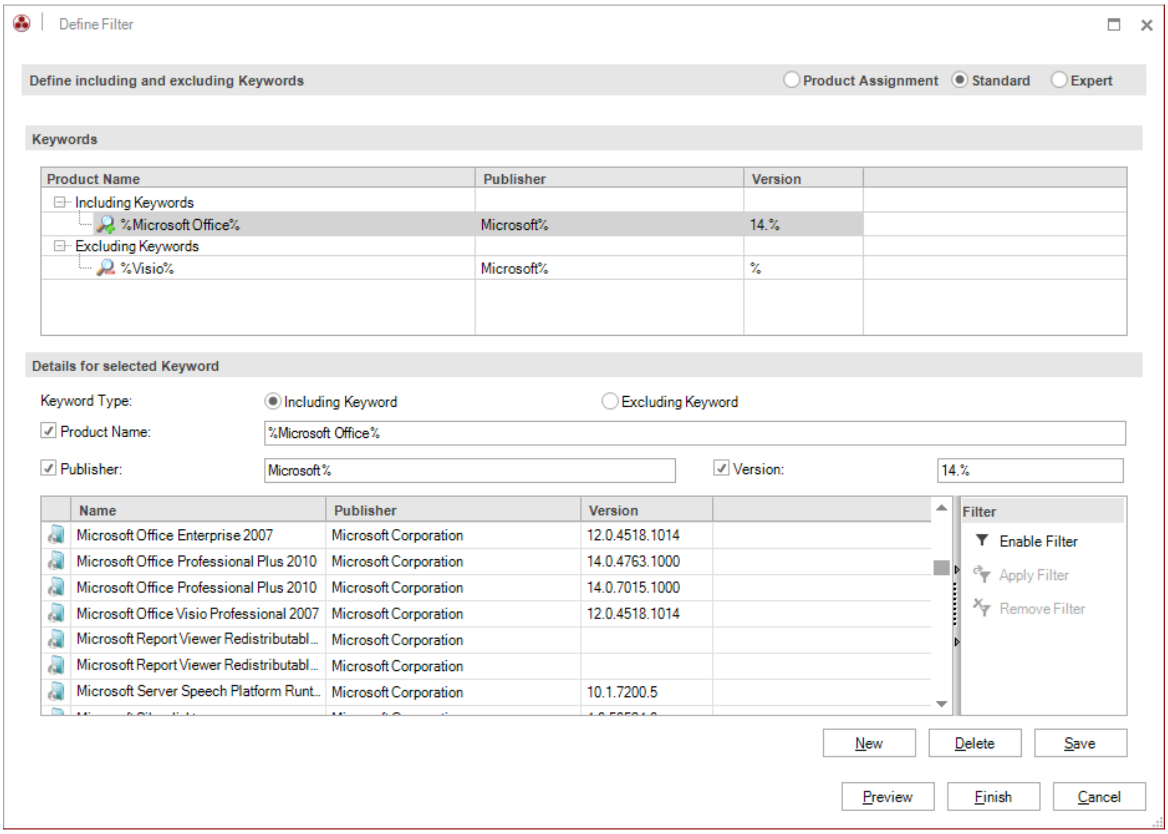
Click the *Keywords* button to open the *Define Filter* dialog.

Generally, you need to distinguish inclusive and exclusive keywords. Inclusive keywords identify all installations that contain the specified keyword, whereas exclusive keywords identify all installations without the specified keyword. Each keyword, regardless of whether inclusive or exclusive, represents a trifold combination consisting of product name, publisher and version. These three components are additively combined for each keyword type, which means that only if all three individual components match for an installation, the entire keyword will return a positive result. You can combine any desired keywords to identify the corresponding installations as precisely as possible, using both inclusive and exclusive keywords to further narrow down a first interim result. Please note that, when using multiple inclusive keywords, every installation that matches any one of these keywords will be returned and, when using multiple exclusive keywords, all installations will be excluded that match any one of those keywords. If you combine inclusive keywords with exclusive keywords, the specified inclusive keywords will only be applied to that set of installations which still remain after applying the exclusive keywords to the entire set of data available.

Click the *New* button to specify a new keyword. If you uncheck the checkbox next to one of the three keyword components, that component accepts any character string. This is indicated by a "%" in the respective field.

As with other Docusnap items, you can edit existing keywords. To do so, select the desired keyword, edit it and then click the *Save* button once editing is finished. To remove a keyword, select it and click *Delete*. A list of all inventoried software installations is displayed at the bottom of the wizard page to help you with selection. By selecting an entry the name, the manufacturer, and version are entered into the text boxes, and must not be entered manually.

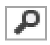
After the keywords have been defined, the dialog is closed by clicking on the *Finish* button and the filter is stored.



Software List

When the *License Management* wizard is opened via the *Software Product Licensing* dialog, the respective software product is already assigned.

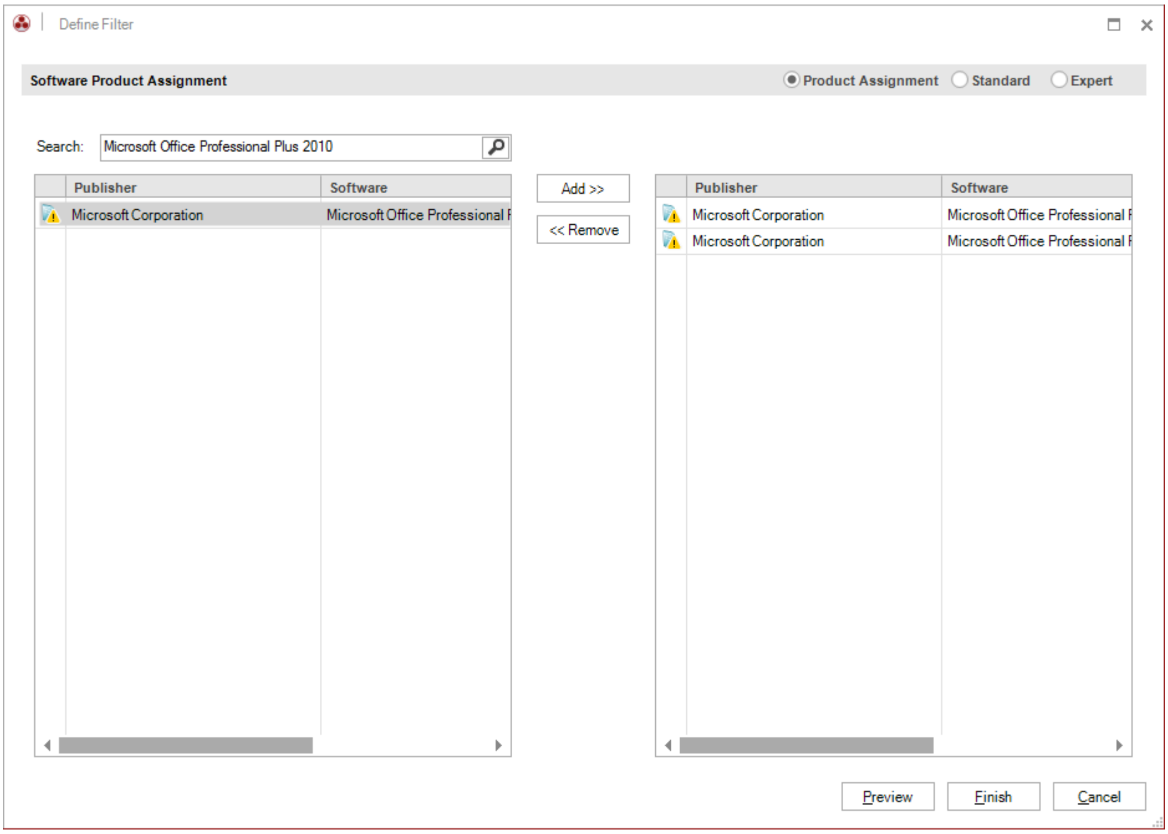
Clicking the *Software List* button opens the *Define Filter* dialog.

In the left list, the software products are listed which can be assigned to the licensing. In the *Search* field the name of the software product is specified by default, and all versions of this software product can be assigned. The search can be adapted and software name, software manufacturers and software version can be searched. To list all software products clear the *Search* field and click the  button.

By clicking on the *Add* button all selected software products are assigned to the current licensing. To delete assignments select the software products in the right list and click the *Remove* button.

In the license evaluation the number of needed licenses will be determined by counting on how many systems the associated software product has been installed.

After the assignment has been defined, the dialog is closed by clicking on the *Finish* button and the filter is stored.



Expert Filter Mode

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

Clicking the *Expert Filter Mode* button opens the *Define Filter* dialog.

Select in the column *Field* if the specified value has to match the product name, the name of the publisher or the version of the software product. Click the button to add another row. Click the button to delete the current row.

- Operator

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

- Contains: The specified value must be contained in the *Software Name*, *Publisher* or *Version*.
- Not Contains: The specified value must not be contained in the *Software Name*, *Publisher* or *Version*.
- =: The value has to match the *Software Name*, *Publisher* or *Version* exactly.
- <>: The value must not match to the *Software Name*, *Publisher* or *Version*.

- And/Or

Once several keywords are specified, select in the *And/Or* column whether the conditions should be linked with *And* or *Or*. If the terms are linked with *And*, then all conditions have to apply to the *Software Name*, *Publisher* or *Version*. If the conditions are linked with *Or*, only one of the terms has to match the *Software Name*, *Publisher* or *Version*.

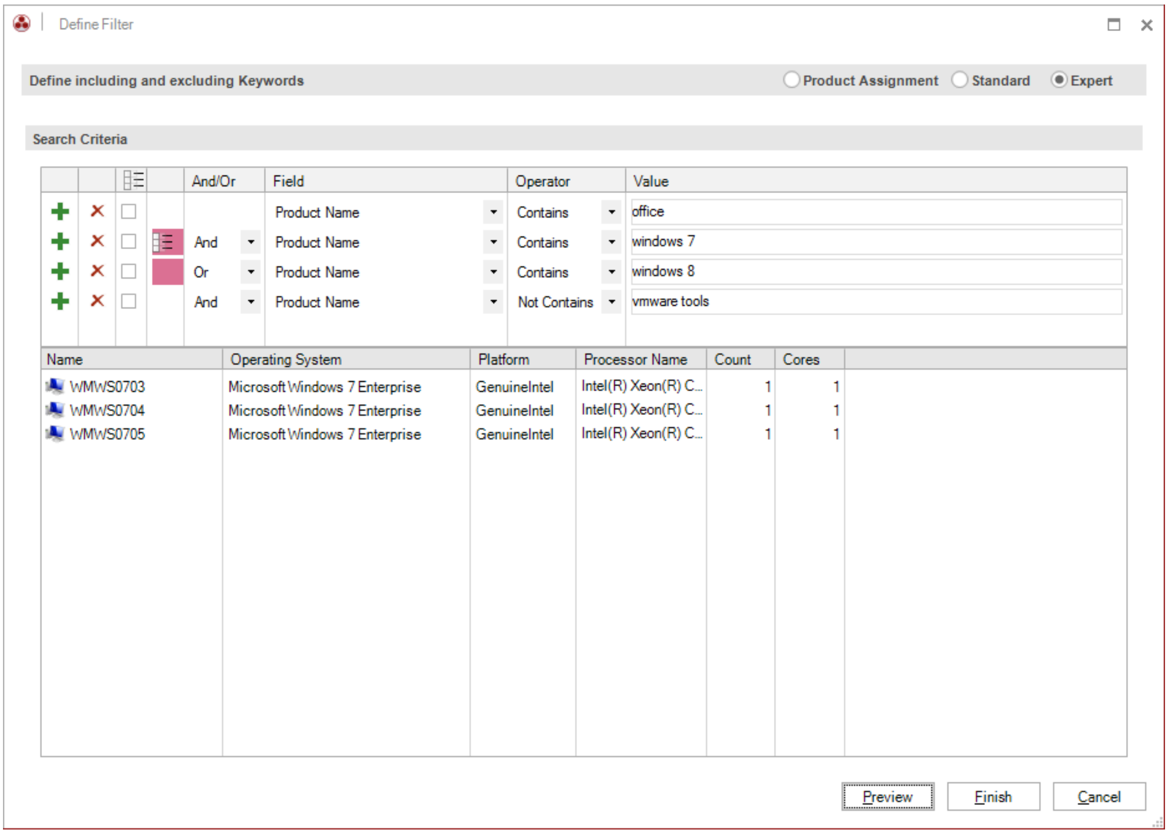
- Grouping

Use grouping to nest the conditions as needed. For example two terms can be linked with *Or* and then be extended with *And* to include another condition. Click the checkbox to select the conditions, afterward click the button to group the selected entries to one condition. Only conditions listed one below the other can be grouped. The button marks the start of the group. Click the button to revoke the grouping. It is possible to organize the grouping in several levels. Select more than one group and click on the button to group them into one condition.

Product name and publisher and/or versions, which are listed directly under each other and are linked with *And* will be regarded as one combination. These components are additively combined, which means that only if all the individual components match for an installation, the entire keyword will return a positive result. The next specified product name is considered as a new combination.

- Example

In the expert mode you can define that additionally to the Office Product either Windows 7 or Windows 8 has to be installed, to be taken into account in this software product. Also no VMware tools are allowed to be installed, since they indicate that a system is part of a virtual environment. This scenario can be defined as follows.



- Preview

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

After the filter has been defined, the dialog is closed by clicking on the *Finish* button and the filter is stored.

Use of Wildcards

In addition to entering exact keyword strings, you can use wildcards as placeholders for other characters to make your keyword entries even more flexible. The table below briefly shows the available wildcards, which characters they can replace and how the wildcards are applied.

Wildcard	Meaning and application	Example
% or *	Any sequence of zero or more characters. Application: %	%Docusnap% --> returns all entries that contain the word "Docusnap" in any position.
_ (underscore)	Replaces any single character.	_ocusnap -->

Wildcard	Meaning and application	Example
	Application: _	returns all entries that end with "ocusnap" and are preceded by any single character.
[]	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.

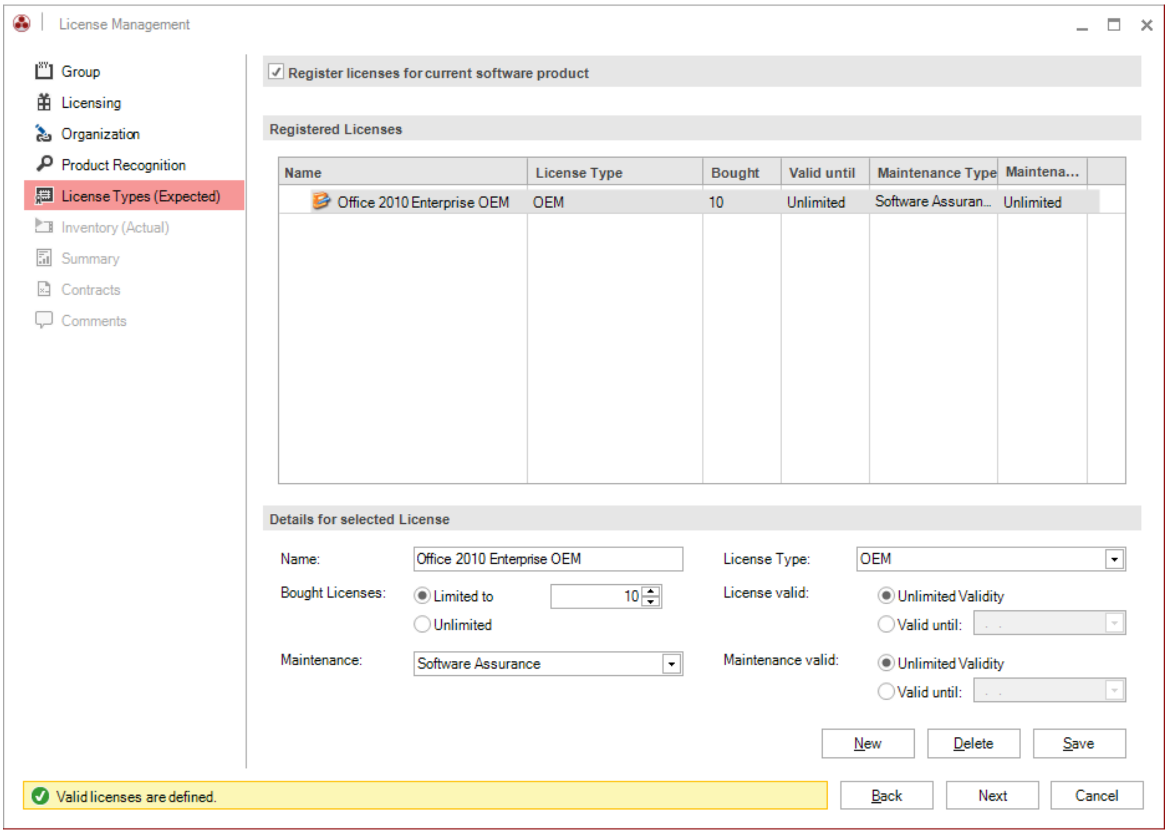
6.3.6 License Types (Expected)

You can assign multiple licenses to each software product registered in Docusnap. These licenses represent the real-life software licenses actually purchased or the corresponding license agreements. When performing an evaluation, Docusnap uses the total number of registered licenses to determine the inventory of licenses purchased for a particular product and to compare it with the number of installations actually found. This results in the balance of the licenses which shows an over- or under-licensing status which might exist. In this step, you can completely disable the use of licenses for the current software product by unchecking the checkbox at the top of the window. This means, of course, that Docusnap will stop counting the expected licenses for this product.

Specify a unique name for each license registered for this software product in order to be able to identify the entry later. Additionally, select the license type for the current software product, enter the number of licenses purchased and their expiration date. By selecting the corresponding options, you can specify that the current software product is unlimited with respect to the number of licenses and/ or their validity period. At the bottom of the wizard window, you can specify whether the license includes a maintenance contract and, if any, and enter its expiration date. Licenses that have expired will no longer be taken into account in the License Management evaluations, however, this is not true for systems assigned to these licenses.

Using the Docusnap Management to edit or delete existing license types and software maintenance types or add new ones. The license types and software maintenance types are for information only and do not affect the behavior of Docusnap when determining the corresponding license balance.

Licenses that have already been entered for the current software product will be displayed in the table at the top of the wizard. The area at the bottom can be used to edit or delete existing licenses or to add new licenses for the current software product.



6.3.7 System Assignment

If, in the second step of the License Management wizard, you selected a category which allows you to 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 in the *Configuration - License Management* dialog. If in the second step, a category without automatic assignment (manual) was chosen, which allows the allocation of equipment, the existing IT assets are also made available and can be assigned.

All previously entered licenses for the current software product as well as any systems or IT assets that might have been assigned already will be displayed in the list on the right side of the wizard page. Within the context of a software product, systems are always assigned on the license level. Thus, a specific system can only be assigned to a specific license.

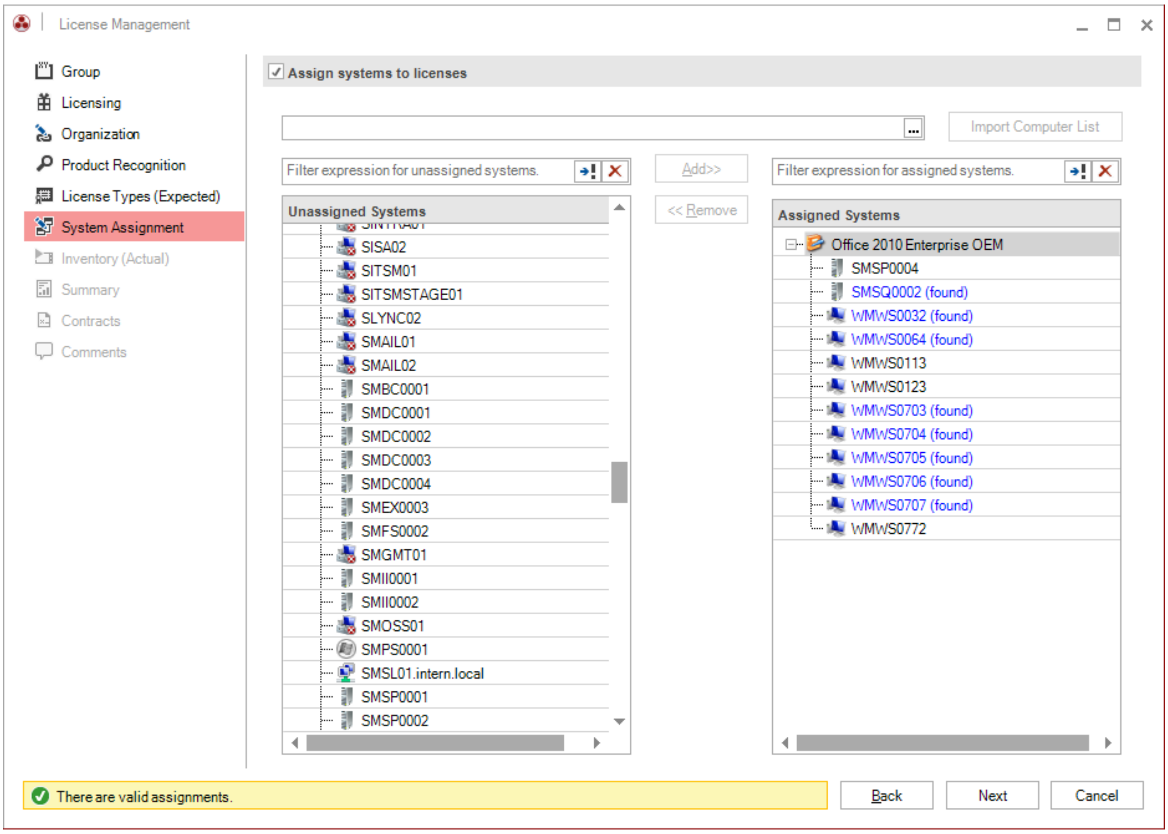
To assign a system to a particular license, select the corresponding system in the list on the left and the corresponding license in the list on the right. Click the *Add >>* button to assign the system to the license. To undo an existing assignment, simply select the desired system in the list on the right and then click the *<< Remove* button. You do not have to select the domain the system belongs, since it will automatically be placed in its correct position. In both cases (adding and removing), you can select multiple systems at a time. To do so, simply hold down the Ctrl key while clicking individual systems with the mouse, or hold down the Shift key to select a contiguous group of systems. Please note that it is not possible to select systems across domain or license boundaries.

The assignment of the IT assets is performed in the same manner. Given that IT assets are not inventoried, but are entered manually, no automatic assignment via the inventoried software can be carried out. Therefore, IT assets can only be assigned to manual licenses. In this case the number of assigned devices and IT assets is used to calculate the number of needed licenses.

Theoretically, you can also assign licenses to systems which could not be scanned by the inventory process. However, these systems cannot be considered in an evaluation before you have not performed a new, successful inventory scan. If the systems could not be found during the inventory process due to given circumstances, but might be successfully scanned in the future, it might make sense to assign them anyway. All evaluations in the License Management module update automatically to reflect the new data.

Depending on the use case and 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 a category with system assignment, the number of processors if a category with processor assignment, and the number of processor cores if a category with processor assignment was chosen. For 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.

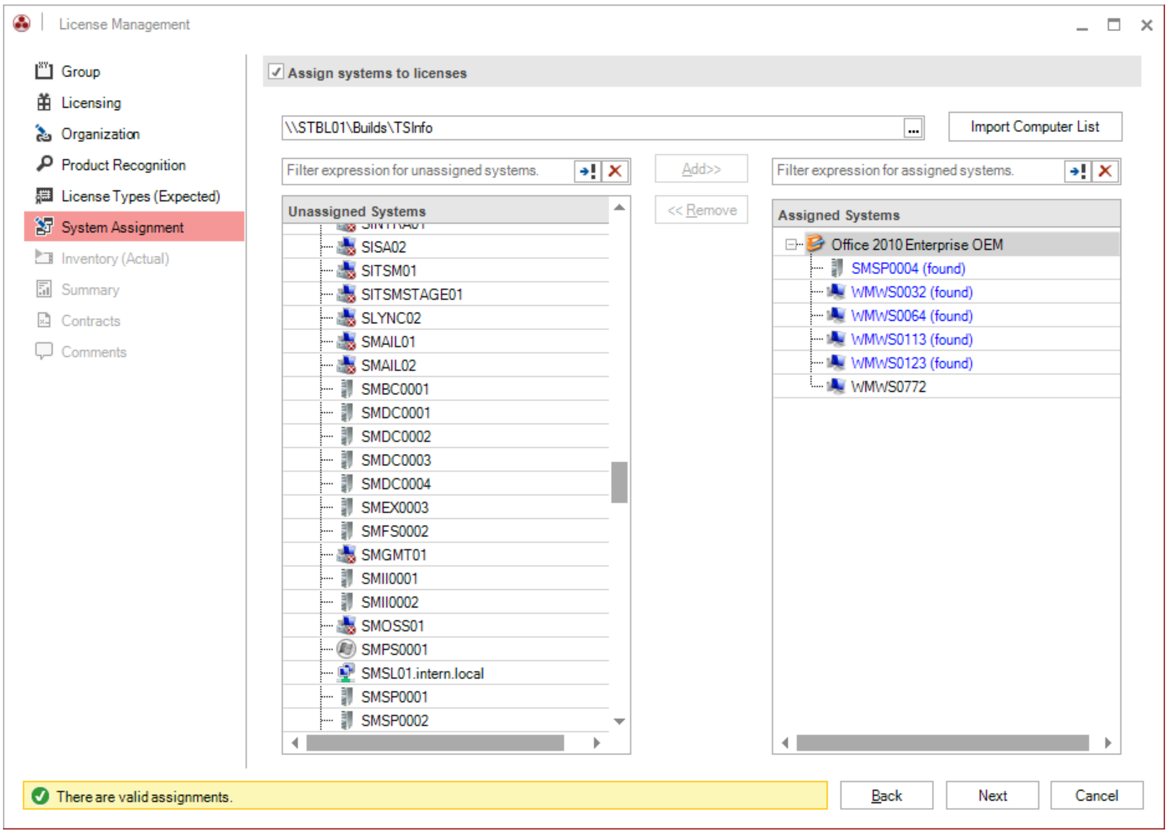


Import Computer List

In Docusnap, you can use the DocusnapTSInfo application to create a log of all systems which log on to a Terminal Server. Based on the information retrieved, these systems can be assigned to the licenses. This requires, however, that the systems have previously been inventoried by Docusnap.

To import the computer list, first select the path where the XML files are located. Then, select the license. This finally enables the *Import Computer List* button. Click the *Import Computer List* button to search the specified folder for the XML files. All systems listed will be assigned to the selected license.

If necessary, you can assign more systems later or undo the assignment of previously assigned systems.

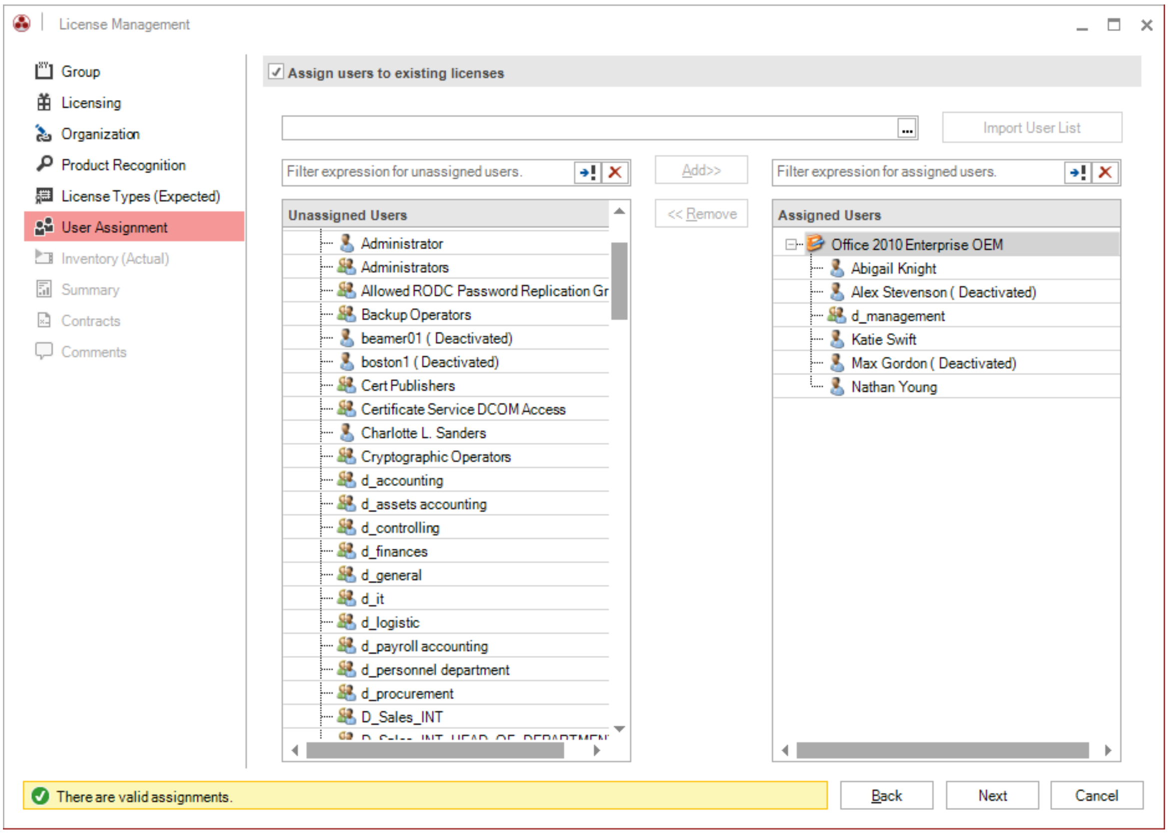


6.3.8 User Assignment

If, in the second step 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.

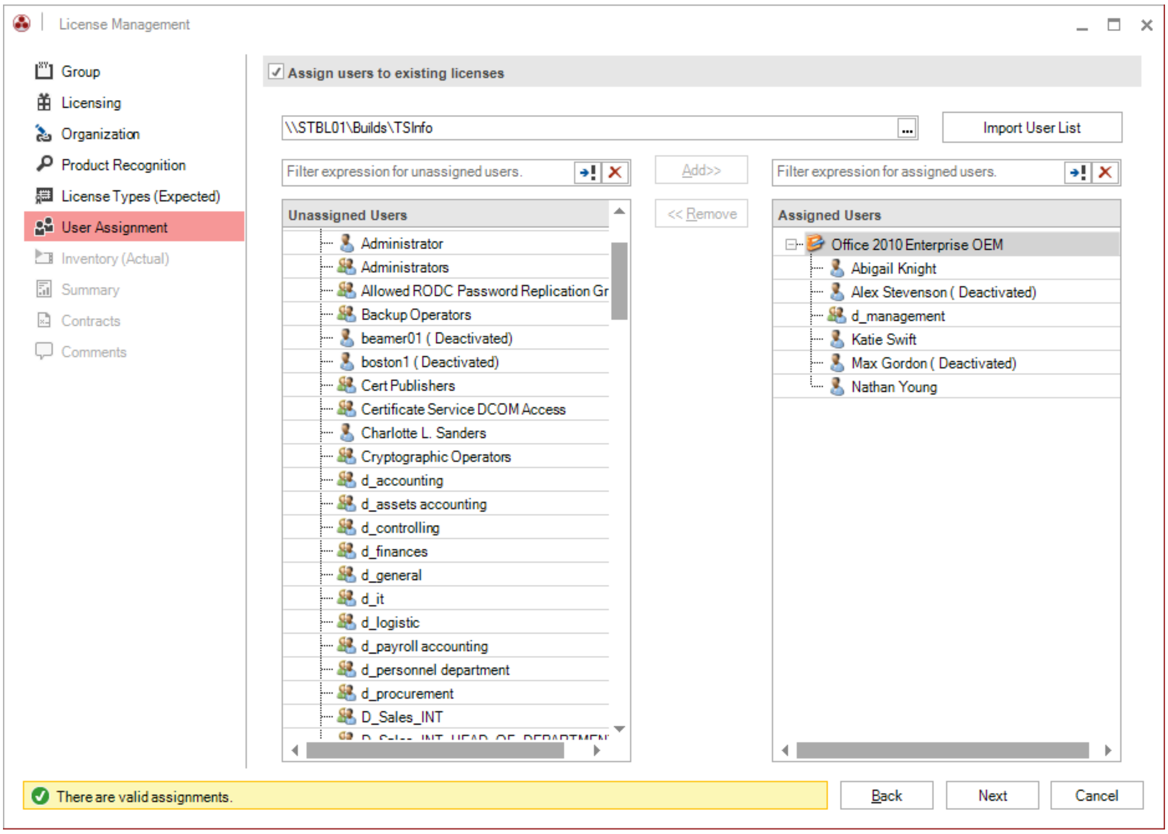


Import User List

In Docusnap, you can use the DocusnapTSInfo application to create a log of all users who log on to a Terminal Server. Based on the information retrieved, these users can be assigned to the licenses. This requires, however, that the users have been inventoried by Docusnap previously.

To import the user list, first select the path where the XML files are located. Then, select the license. This finally enables the *Import User List* button. Click the *Import User List* button to search the specified folder for the XML files. All users listed will be assigned to the selected license.

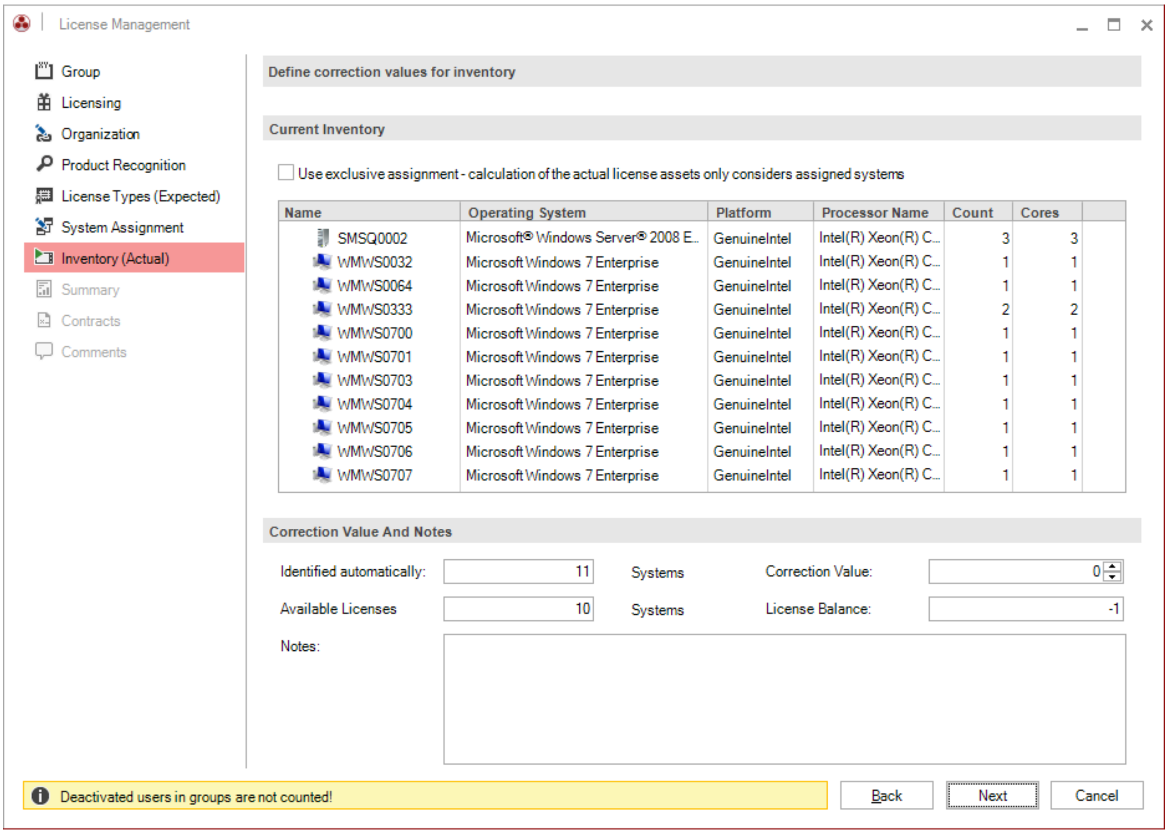
If necessary, you can assign more users later or undo the assignment of previously assigned users.



6.3.9 Inventory (Actual)

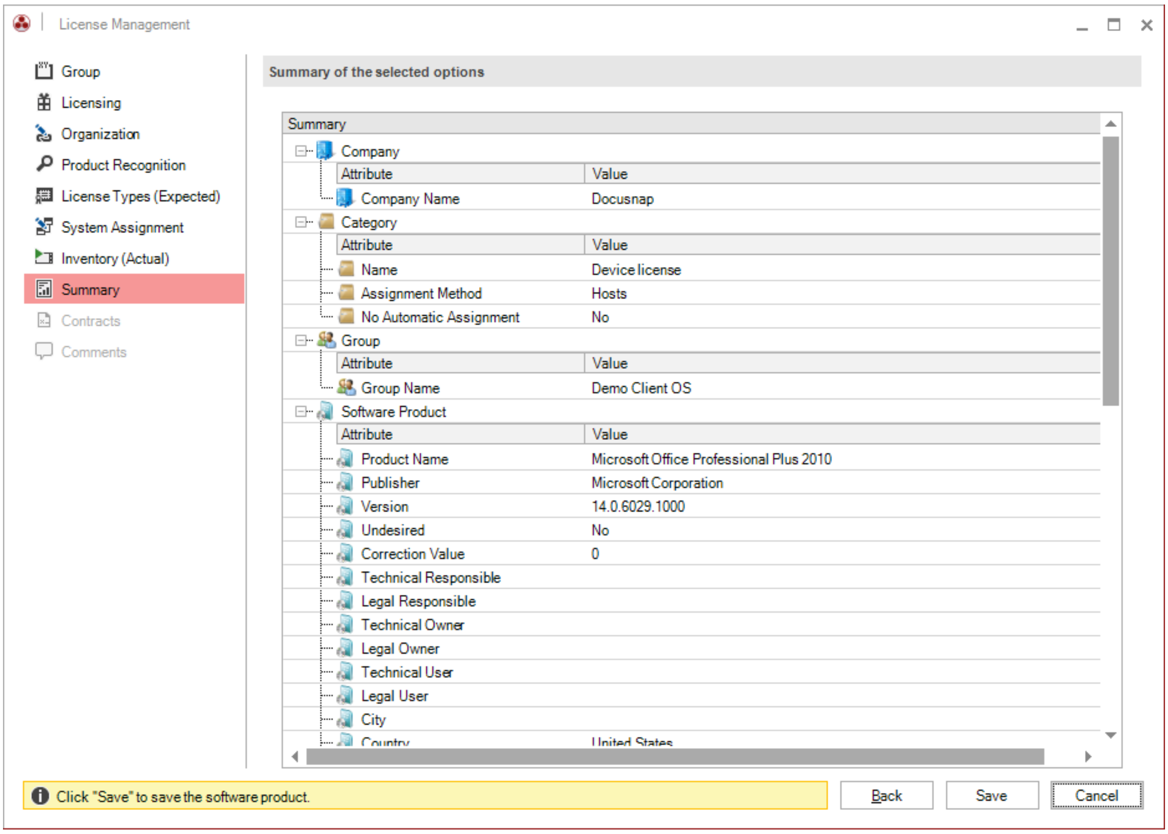
In this step, you can take corrective action with respect to the automatic determination of the existing installations and the associated evaluations in the context of License Management. At the top of the wizard page, a list will be displayed which contains the current inventory. It shows all systems where a software installation was found which matches the previously entered definitions. If the *Use exclusive assignment* checkbox is enabled, the list only includes those systems which were actually assigned to the current software product in the System Assignment step. This is an alternative way to assign licenses to systems. This procedure is not available for user assignment. This exclusive assignment will not be reflected in the way how the software products are displayed in the license tree view. It will, however, be taken into account in the evaluations and reports.

The number of licenses in use in the company, as determined by the automatic software inventory mentioned above, will be displayed in the *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 more licenses were found to be in use than are in reality. In this case, you can adjust the automatic inventory to the lower value. A correction value of zero means that the evaluation will only be based on the result from the automatic inventory. Manual correction values are kept beyond the expiration date of the registered licenses.



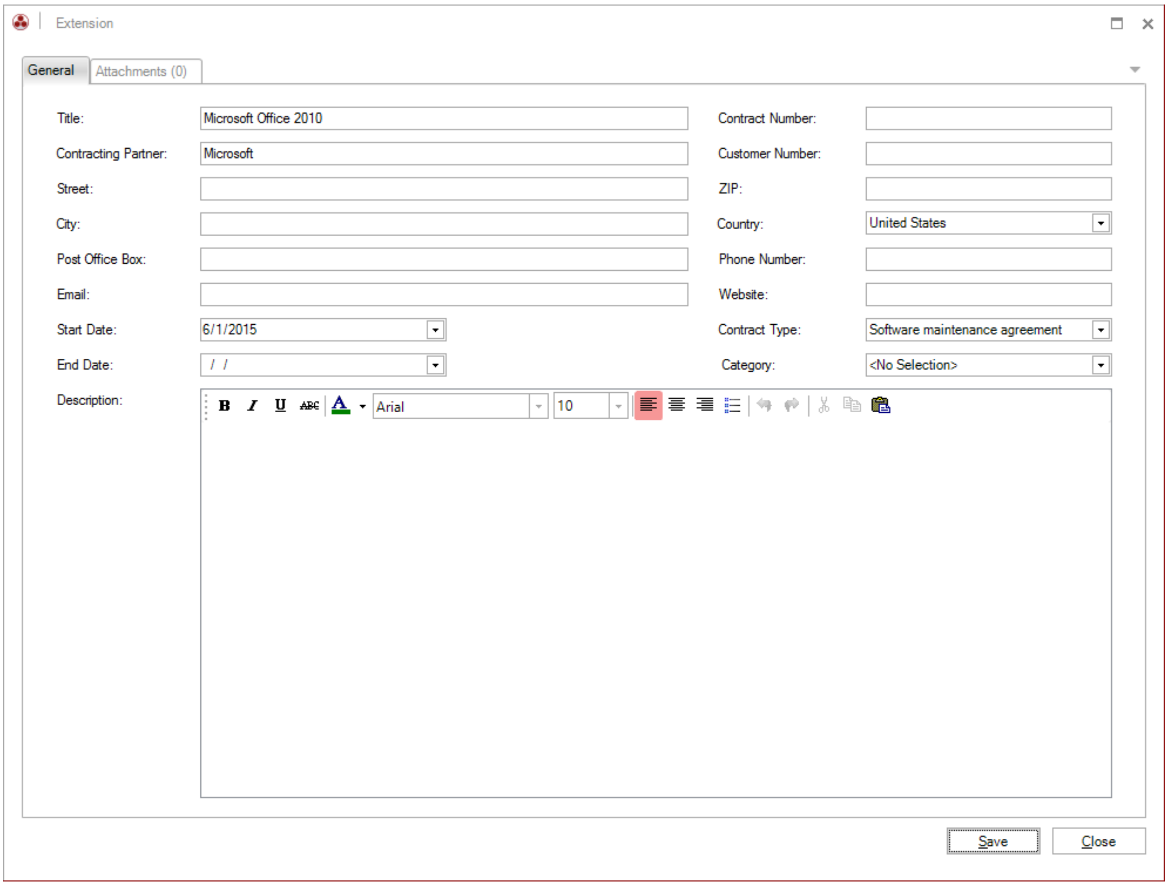
6.3.10 Summary

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



6.3.11 Contracts and Comments

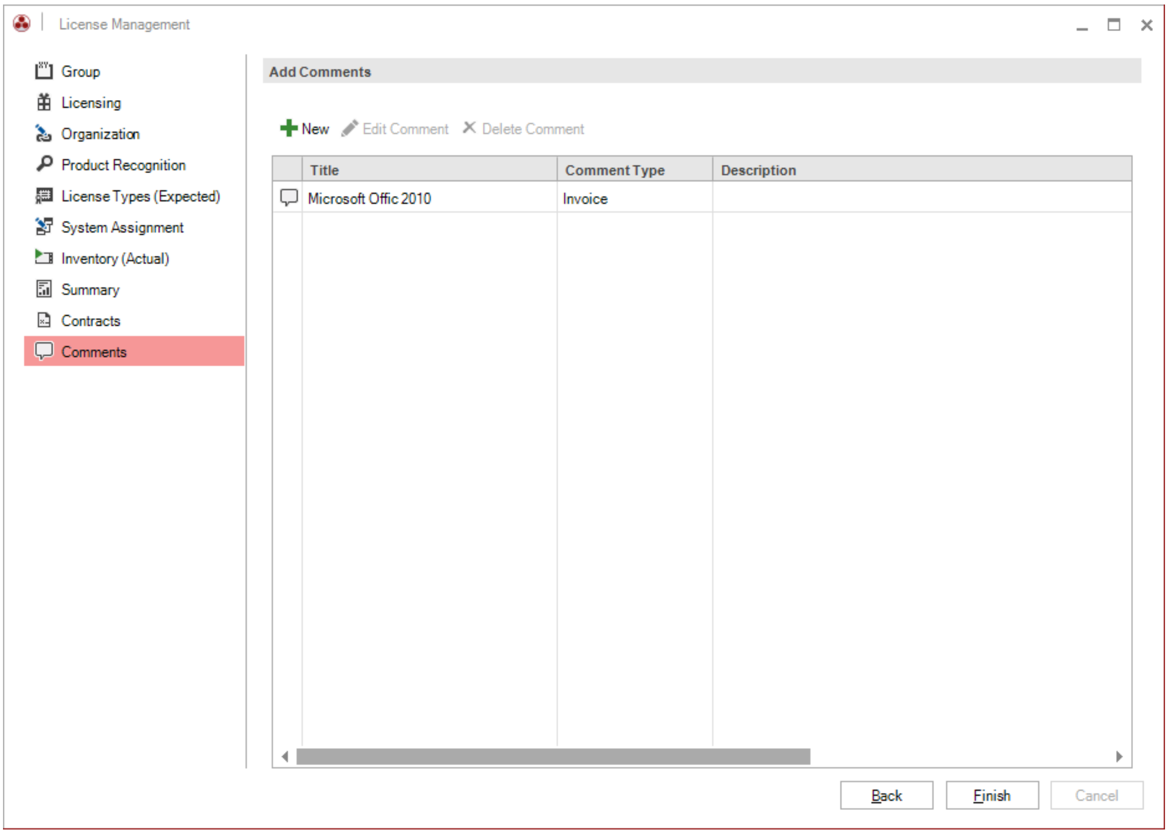
For a created licensing the extensions contracts and comments can be added through the wizard. Click the *New* button to open the dialog for creating the extension. After all required values have been entered, the extension is saved by clicking on the *Save* button. After the contract or the comment has been saved, you can switch to the *Attachments* tab to attach documents. Subsequently, the dialog is closed by clicking the *Close* button.



To edit an existing contract or comment, select the contract or comment and click on the *Edit Contract* or *Edit Comment* button to open the dialog for editing.

The created contracts and comments are displayed in the Comments and Contracts tab of the respective licensing in the tree view and can be edited. In addition, the contracts and comments are displayed in the tree under the respective heading.

By clicking on the *Finish* button the *License Management* wizard closes.

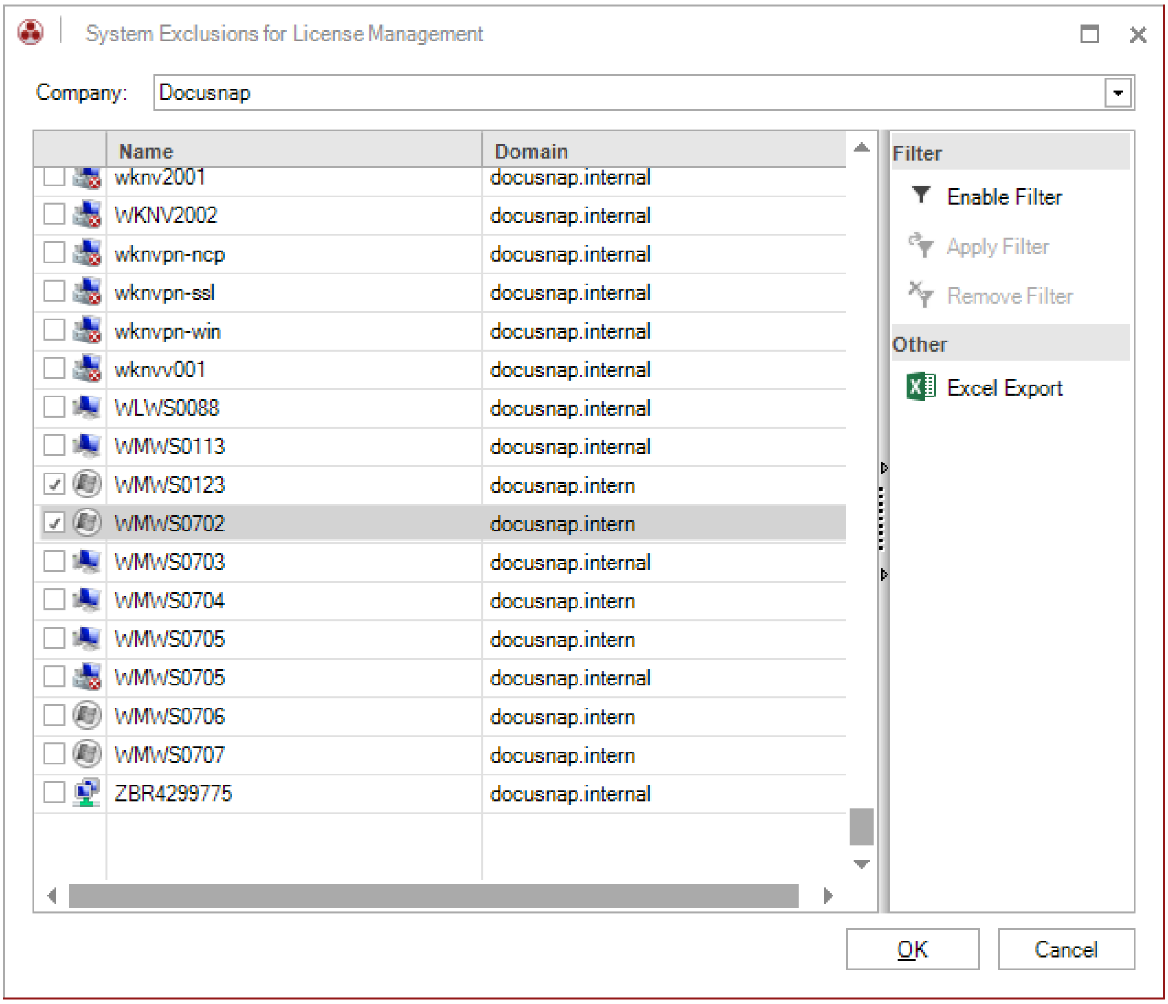


6.4 System Exclusions

Systems, and the software installed on them, may be excluded from license management either by means of the *Exclude Systems* button or the *Exclude from License Management* checkbox in the editor window. Clicking the *Exclude Systems* button opens a dialog where you can edit the exclusion list.

After you have selected the corresponding company, all systems associated with this company and running an operating system which is taken into account in License Management will appear in the list below it. By enabling the checkbox next to a particular system, you can exclude it from License Management. Accordingly, systems without a checkmark will be included in the License Management process. You can quickly and easily undo a previous system exclusion by clearing the corresponding checkbox again.

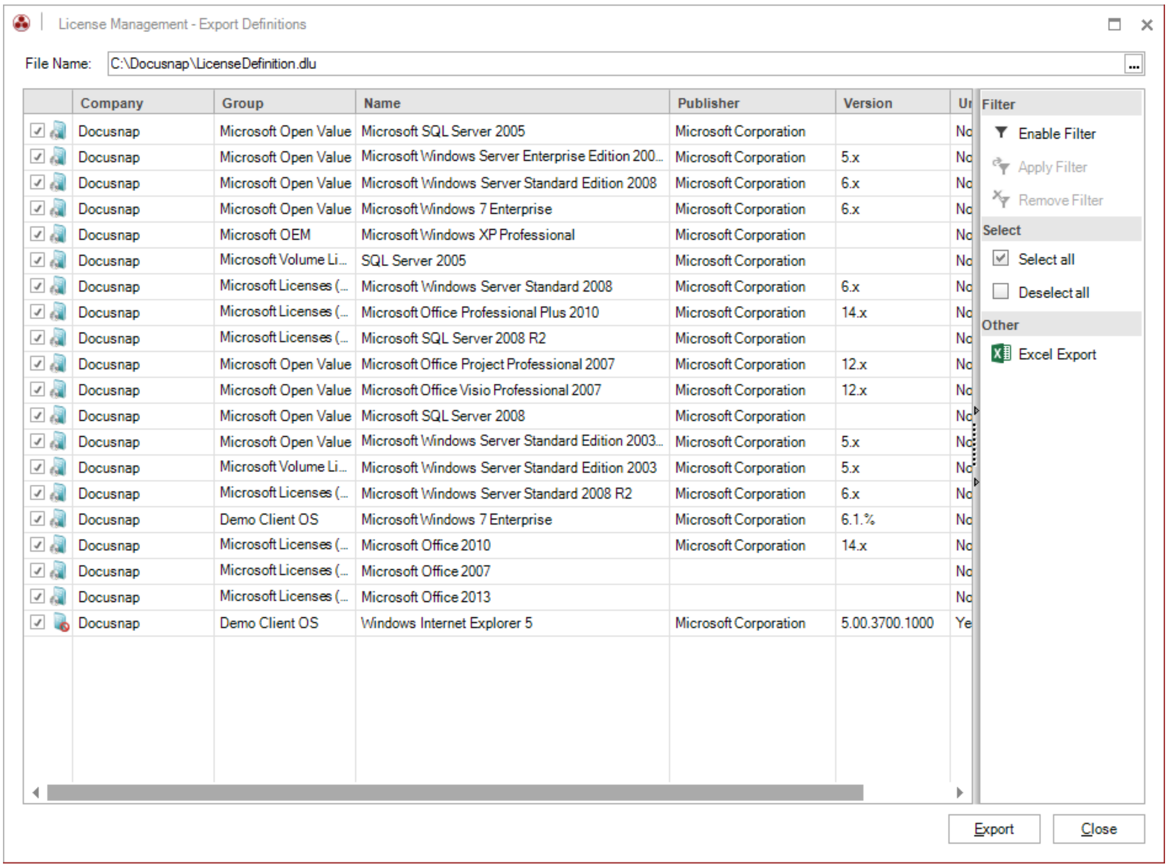
Excluding certain systems from license management may be useful, for example, if a system is operated as a test environment for which no actual license is required. If a company has a great number of inventoried systems, it might be a good idea to use the filter options next to the list to filter the systems, for example, by domain and thus facilitate their selection.



6.5 Export Definitions

You can export all static data related to the registered software products to an external file, so that these settings need not be re-entered from scratch, for example, when switching between databases. Click the *Export* button in the *Licenses* ribbon to open a dialog where you can save the data on registered software products to an external file.

You can specify the file to which you want to export the corresponding data in a field at the top of the dialog. Clicking the ... button will open a file/path selection dialog. The table in the *Export Definitions* dialog shows a list of all products registered for all companies in this database. Click 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.



6.6 Import Definitions

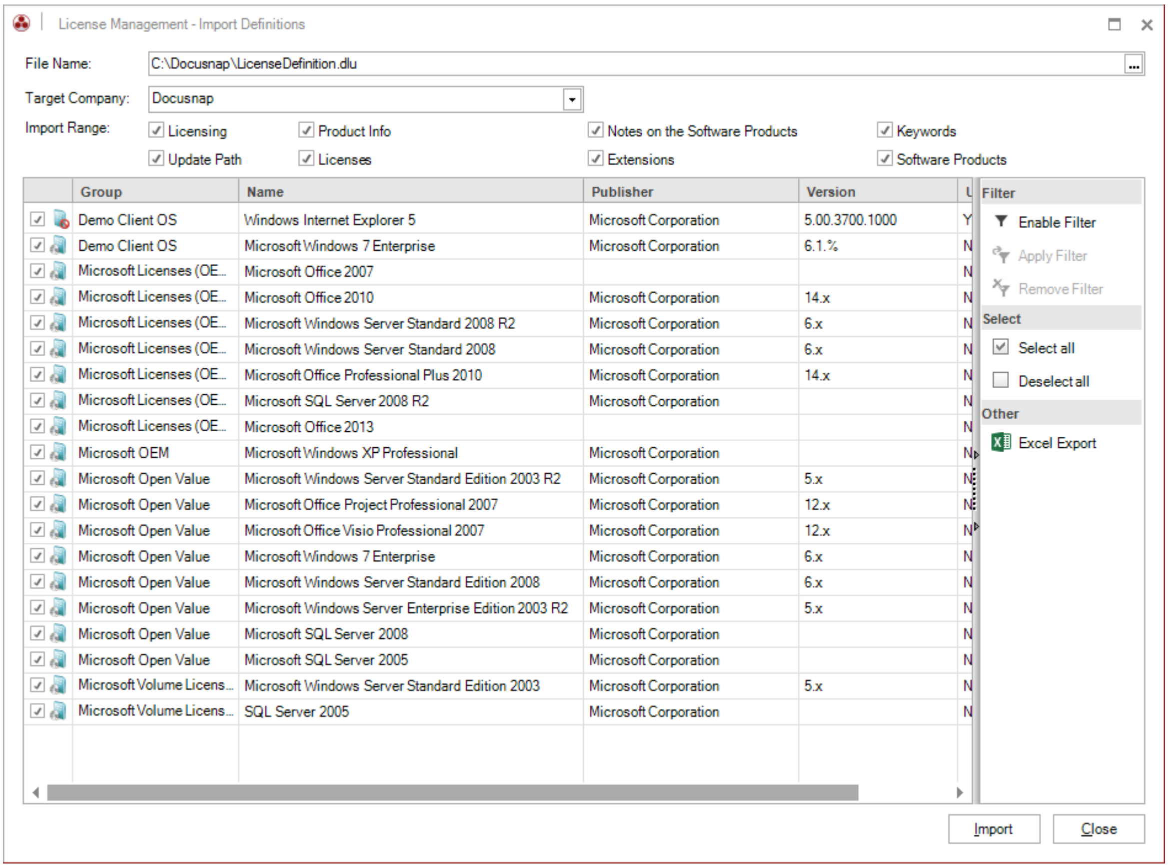
You can import previously exported license definitions to another database. To do so, click *Import* button in the *Licenses* ribbon. A dialog for configuring this import process opens.

After clicking the ... button next to the field at the top of the dialog, you can select a previously exported definition file. It is also possible to import data from earlier Docusnap versions into a 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.

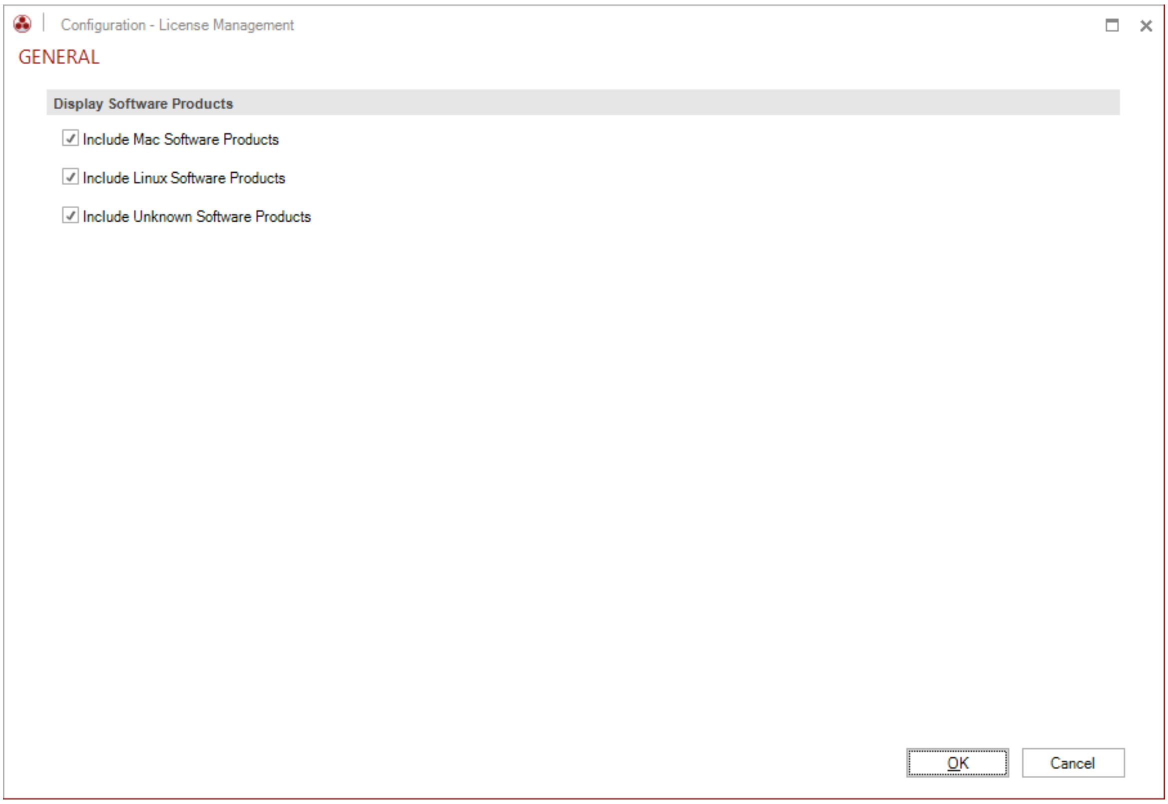


6.7 Configuration

Settings for the license management can specified in the *Configuration - License Management* dialog. Click the *Configuration* button in the *Licenses* ribbon or the *License Management* button in the Docusnap Menu to open the dialog.

General

Use the *Include Mac Software Products, Include Linux Software Products* and *Include Unknown Software Products* checkboxes to specify which software products should be provided for selection in the *Software Product Licensing* dialog.



6.8 Evaluations

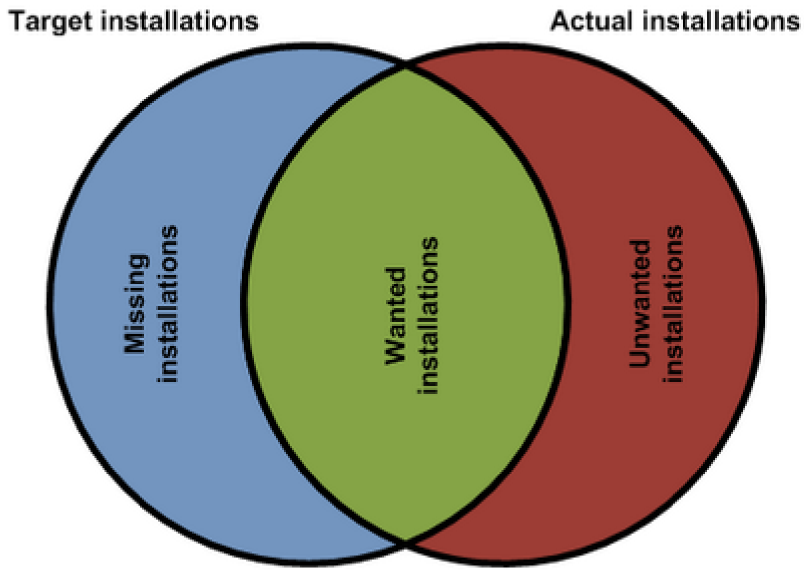
To evaluate the results in terms of licensing, many different options, that can be adjusted and extended using the Customizing module, are available in Docusnap. Basically, you have the choice between evaluations available directly from the tree view in the License Management module and evaluations presented as reports. Please note that the report-type evaluations usually provide more functionality, especially when it comes to determining the licenses currently in use in the company. Most automated evaluations will result from applying the assigned software products or the defined keywords to the inventoried software dataset and thus are based on the identified systems where the corresponding installations have been found. Undesired Products refer to a special form of evaluation that will be explained in a separate section.

Tree view evaluations

All tree view evaluations described in this section feature a consistent use of icons which enable you to easily differentiate between the various operating systems and system types where the corresponding installation was found. Under the *Found Software* node, you will find the most basic evaluation in the License Management tree view. All software products found on the inventoried systems that where assigned to the licensing or match the corresponding combination of keywords are displayed here. Accordingly, installations of products for which no keywords have been defined or products of categories with no automatic assignment will not be shown under this caption. Found installations are grouped by name, publisher, version and operating system. Each node lists all systems where the corresponding installation was found. The icons displayed in the tree help you to identify whether the corresponding installation is wanted or unwanted, the icon representing a wanted installation and the icon an unwanted installation. Whether a certain installation is wanted or unwanted, depends on the assignment of systems to individual product licenses. All installations on systems that have been assigned to a valid license for the corresponding product are considered as wanted installations, all others are considered as unwanted installations.

For a quick overview of the current licensing situation, five additional nodes are available below the *Installations* node in the *License Management* tree. Under the *Expected Installations* node, you can find the systems assigned to all licenses available for the respective software product in a flat list. The *Actual Installations* node features a list of all systems where at least one installation was found which was assigned to the licensing or matches the specified combination of keywords. All systems that have been assigned to a valid license of the current software product and on which at least one installation was actually found by applying the filters are listed under the *Wanted Installations* node. This exactly represents the intersection between the *Actual Installations* and *Expected Installations* categories. Contrary to this, the *Unwanted Installations* node lists all systems to which no valid license for the respective software product has been assigned. The *Missing Installations* node lists those systems where an installation should have been found, but where this was not the case when Docusnap applied the definitions from the product recognition. Ideally, the two categories *Expected Installations* and *Actual Installations* should be identical and exactly the same systems should be found under the *Wanted Installations* node. In a perfect environment, the two categories *Unwanted Installations* and *Missing Installations* would be empty. If any systems are listed under these two nodes, corrective actions are necessary on the network level or with the respective installations.

The figure below graphically illustrates this fact, the circle on the left representing the expected installations and that on the right the actual installations found by the inventory process. The green intersection of the two circles in the figure represents the wanted installations; this results in the missing installations being the remaining set of the expected installations, depicted in blue, and the unwanted installations being the remaining set of the actual installations, depicted in red. In an ideal environment in terms of licensing, the two circles would be congruent.



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.

Variance Analysis

Available Licenses	10
In use (assigned automatically)	2
Correction Value (manual)	0
Subtotal	8
Correction Upgrade / Downgrade Licenses	-5
Total	3

Sum of all valid licenses. If the number of licenses is unlimited the needed amount of licenses is displayed.

Number of systems the software is installed on.

Number of licenses used by update or downgrade paths.

Number of missing or surplus licenses.

License Evaluation

All software products associated with the group or company will be displayed in a license evaluation table. A chart with an overview of missing or unnecessary licenses is displayed below the table.

Company: Docusnap AG

Group: Microsoft

Product Name	Available	In use (automatical)	Correction Value (manual)	Subtotal	Upgrade/ Downgrade	Total
Microsoft Office Enterprise 2007	3	3	0	0	0	0
Microsoft Office Professional Plus 2010	10	1	0	9	0	9

6.9 Undesired Products

Products that should not be installed on any system in the company are referred to as undesired products in Docusnap. You can define this classification at the respective product level 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.

6.10 Docusnap TS Info

Docusnap provides the DocusnapTsInfo.exe utility to help you identify all systems and users that log on to a terminal server. This makes it easier, in the context of License Management, to assign licenses to systems and users that use the terminal server.

To start the logging process, add the *DocusnapTsInfo.exe* executable file e.g. to the login script for the domain. You can set a particular parameter to define the directory where the XML files will be stored. As a parameter, you need to specify the path to that location:

DocusnapTsInfo.exe "\\STBL01\Builds\TsInfo"

This folder contains the XML files that hold information on the logged-in users and devices.

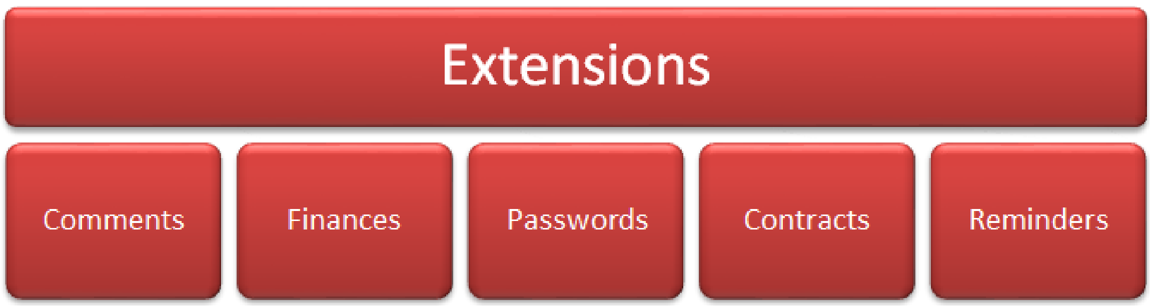
The script is located in the *Bin* folder of the installation path.

Part VII

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.

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

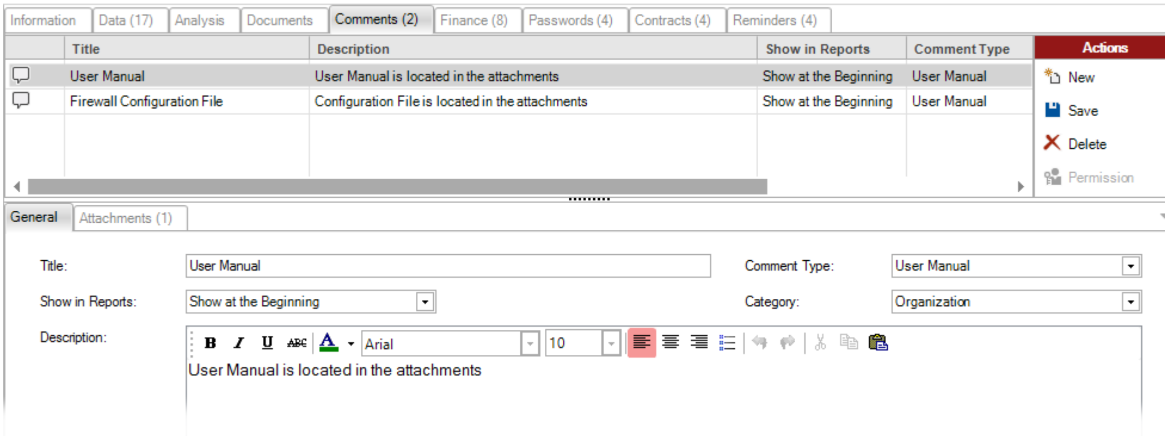
Comments can be used to store additional information about individual objects. You can, for example, store the current configuration file for a firewall (SNMP device). Comments can also be shown on datasheets and in reports.

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. 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.

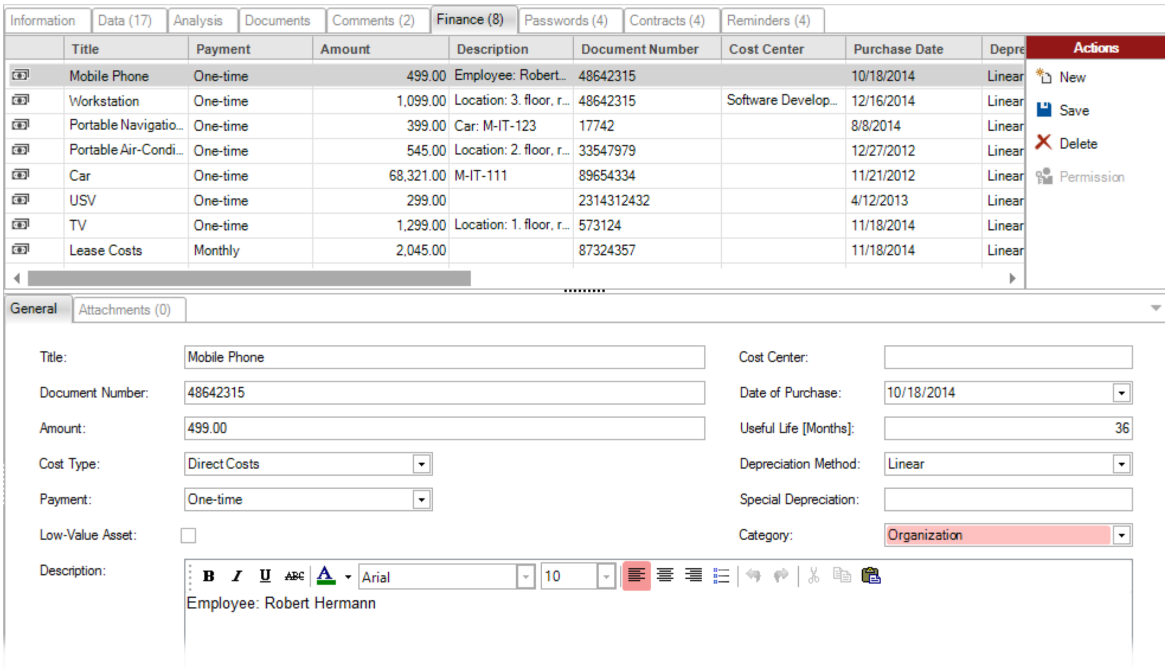


7.1.2 Finances

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. 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.



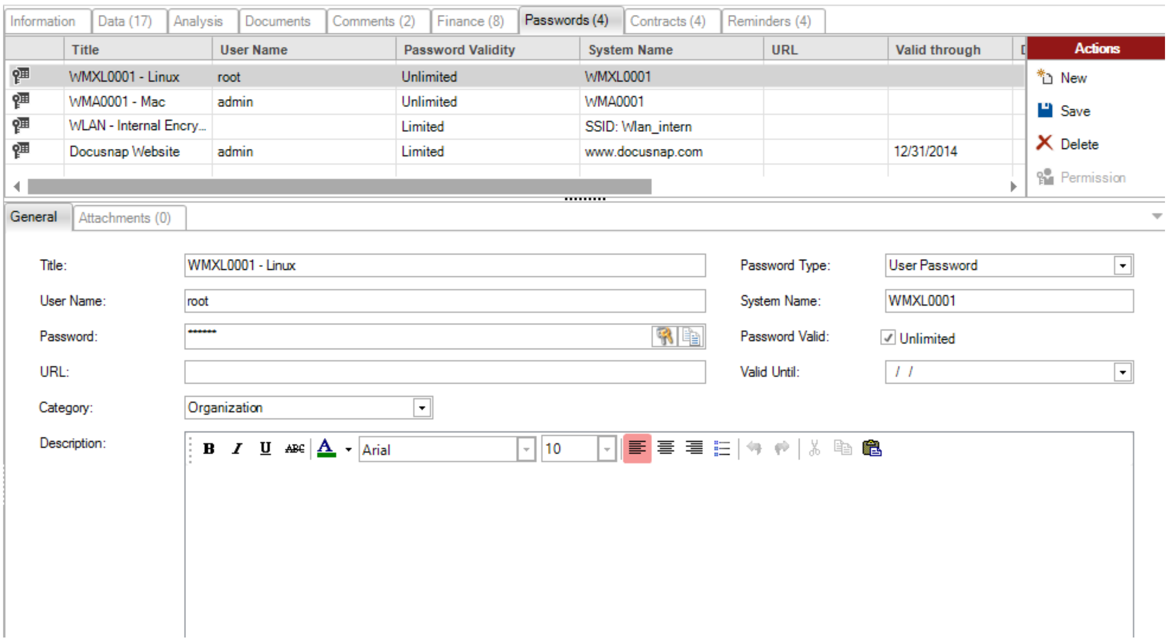
7.1.3 Passwords

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. Its content will be displayed on the *General* tab.

Click the icon in the *Password* field to displays the password as plain text. Clicking the icon again will replace the passwords by asterisks again. Using the icon, you can copy the password to the clipboard. If Password Logging is enabled, Docusnap will keep a log of all users who copied or displayed the password.



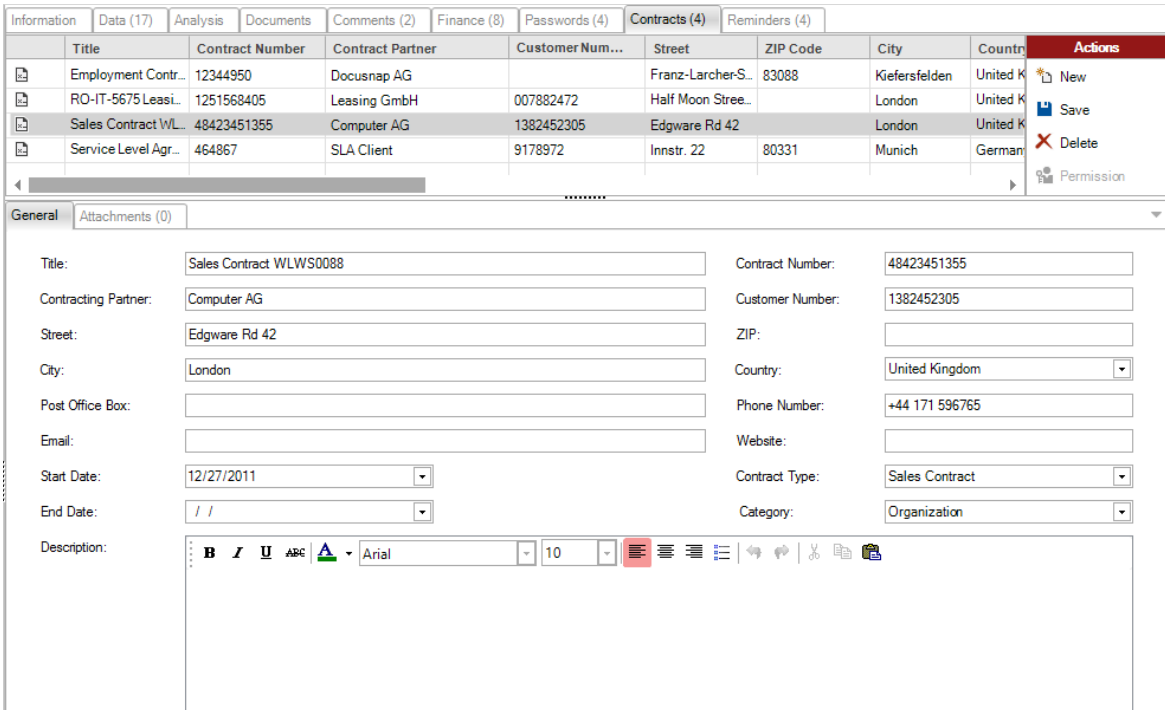
7.1.4 Contracts

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 notifications when the contract has expired.

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

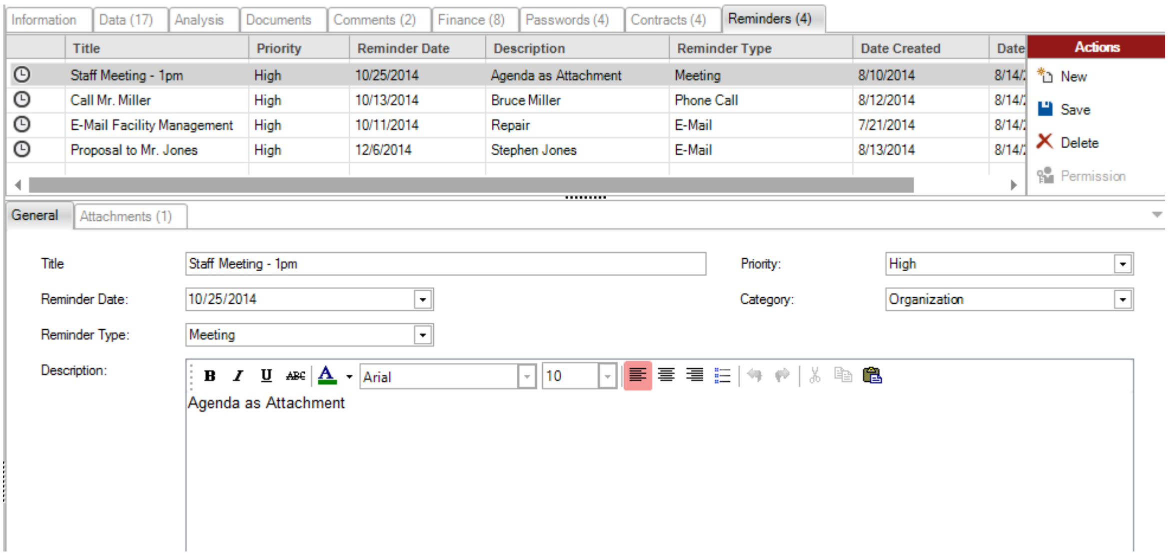


7.1.5 Reminders

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

Thanks to the *Notifications* feature in Docusnap, you can have the program automatically send an e-mail if the reminder date is the same as the current date or lies ahead. Thus, the overdue reminders are listed in the email attachment.

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



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.

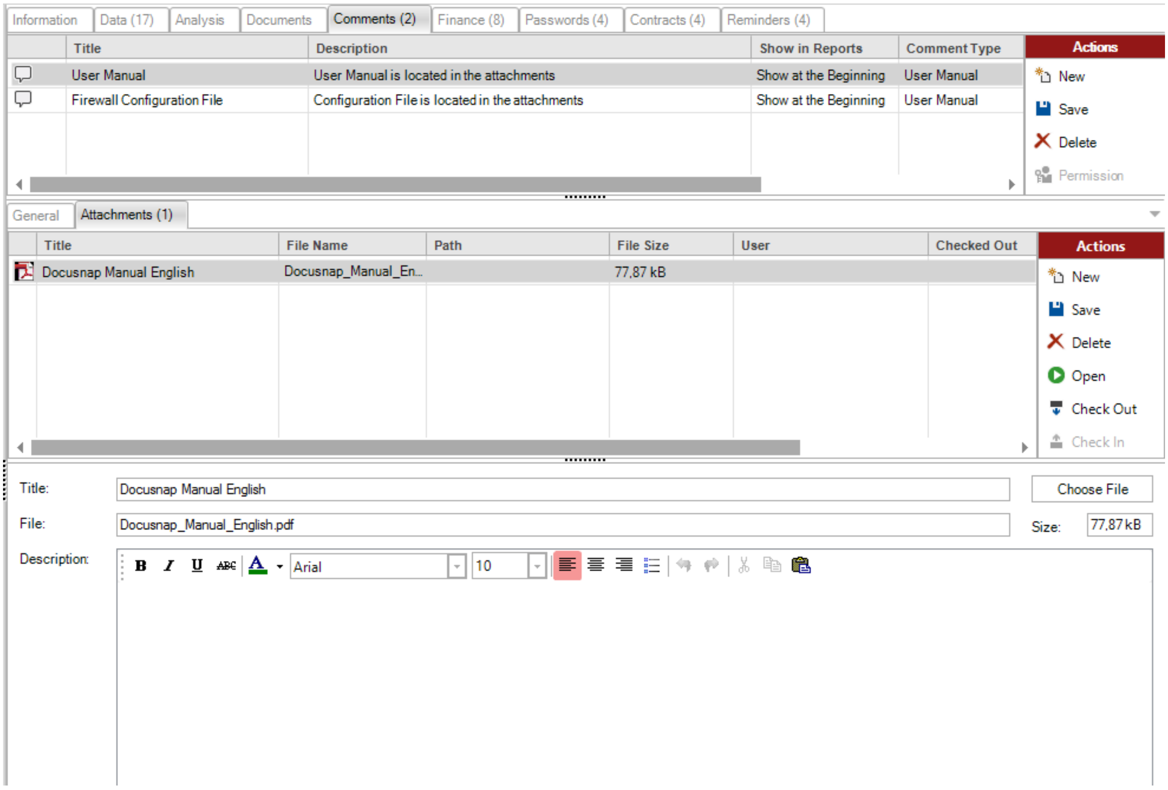
- Click the *New* button on the Attachments tab to enable the data entry screen where you can define the attachment. When you click the *Choose File* button, a dialog opens where you can select the desired file. After you have selected the desired file, the *Title* text box will automatically be populated 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 *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 to open the file with the program that is set as the default program for that file type on your system.

Editing Attachments

Attachments can be edited at any time. To edit the file, you must select it. Then, click the *Check Out* button. The file will be stored in the *check out path*. *Checking out* a file prevents the file from being edited by multiple users at the same time, which would introduce inconsistencies. To make the checked-out file available to other users again, release it by clicking the *Check In* button. *Checking in* the modified file saves it back to the database.



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.

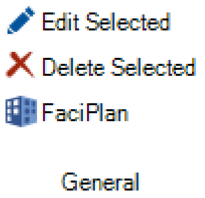
The organization tree is displayed in the tree view. It contains all extensions, both summarized under the *All* node and grouped by company. Additionally, reports for evaluating the extensions are available.

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

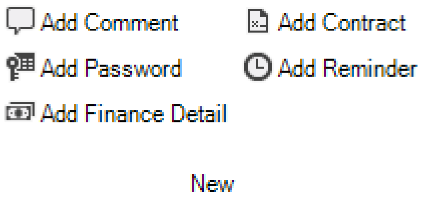
To open the selected extension in the editing window, click the *Edit Selected* button.

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

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.

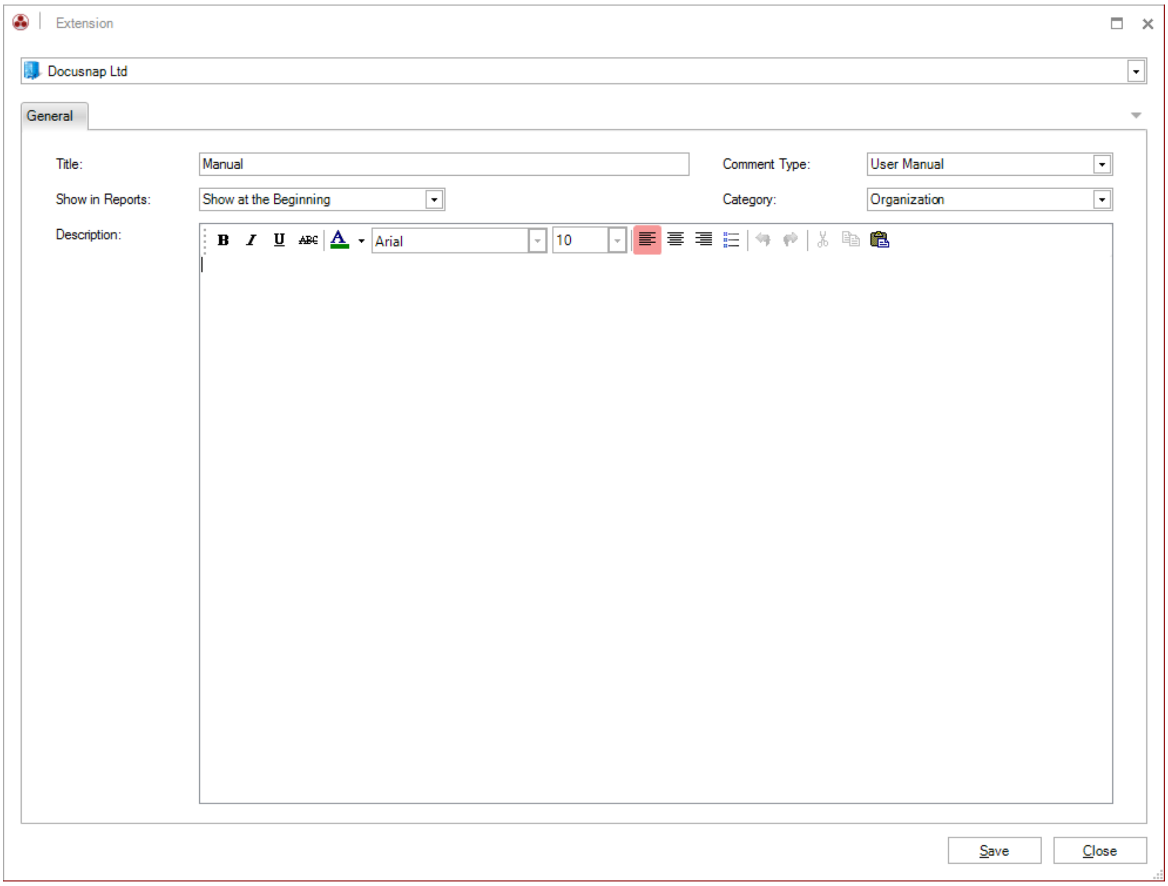


From the *Organization* ribbon, it is possible to create new extensions. From the *New* group, comments, passwords, financial elements, contracts and reminders can be added. Clicking one of the button there opens the corresponding dialog.



The same dialog is displayed 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 the same data entry screen as the one 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.



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.

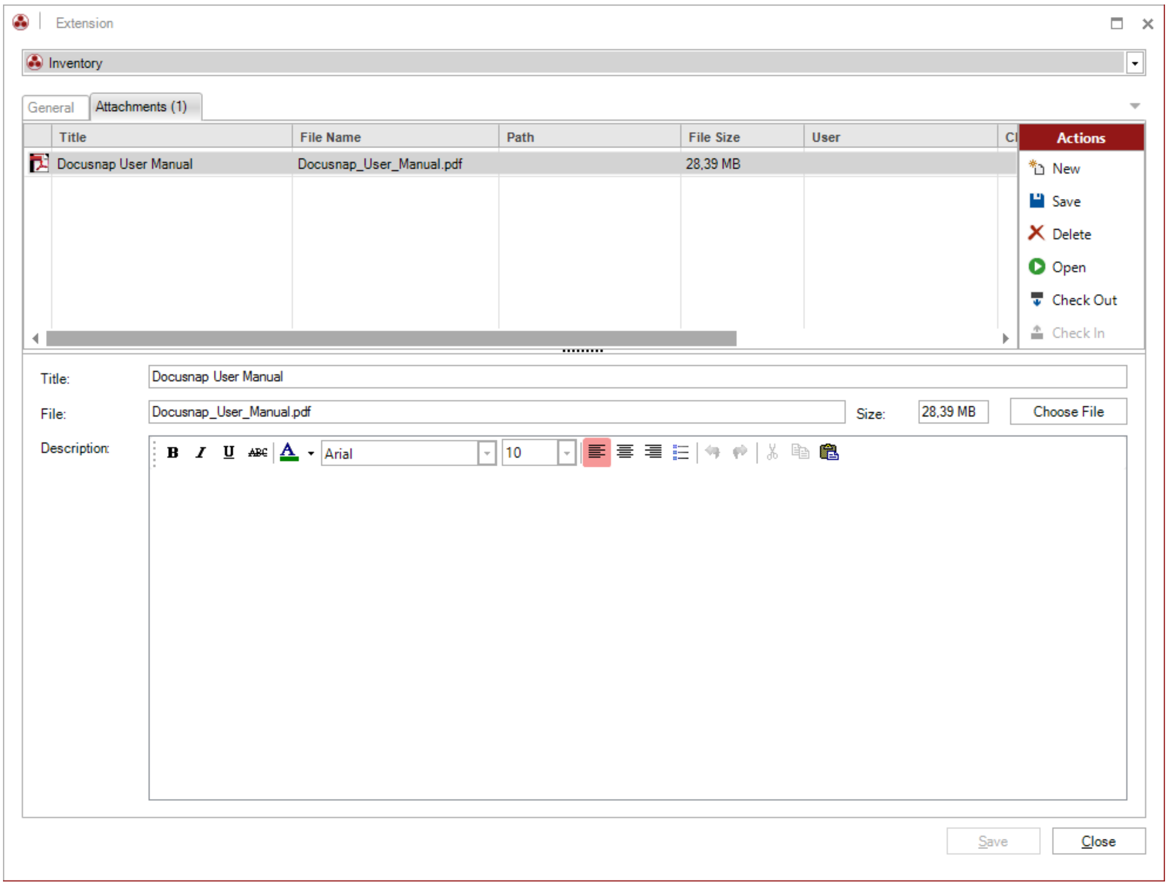
Opening Attachments

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

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 will be saved in the folder you specify here.

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.



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.

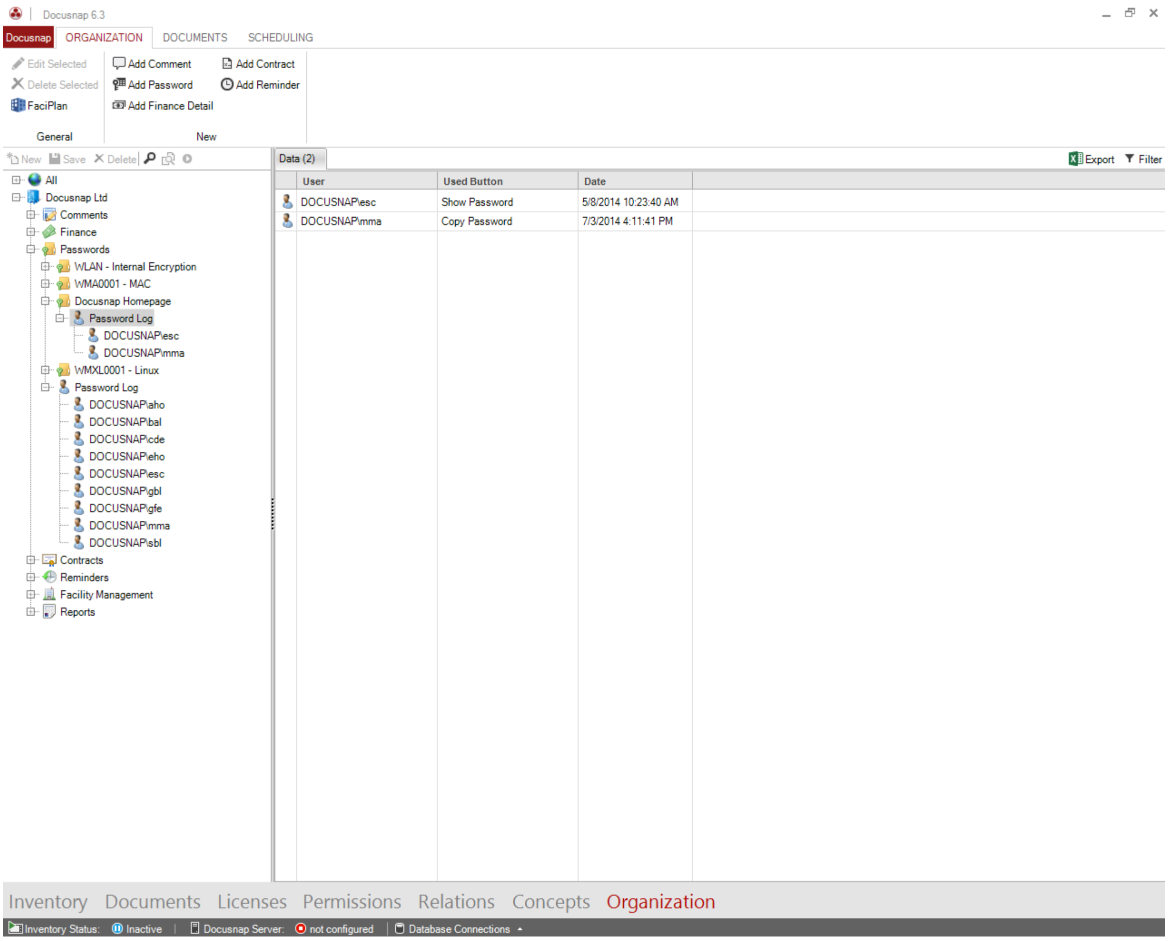
Password logging can be enabled and disabled from the *General* page of the *Options* dialog.

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.

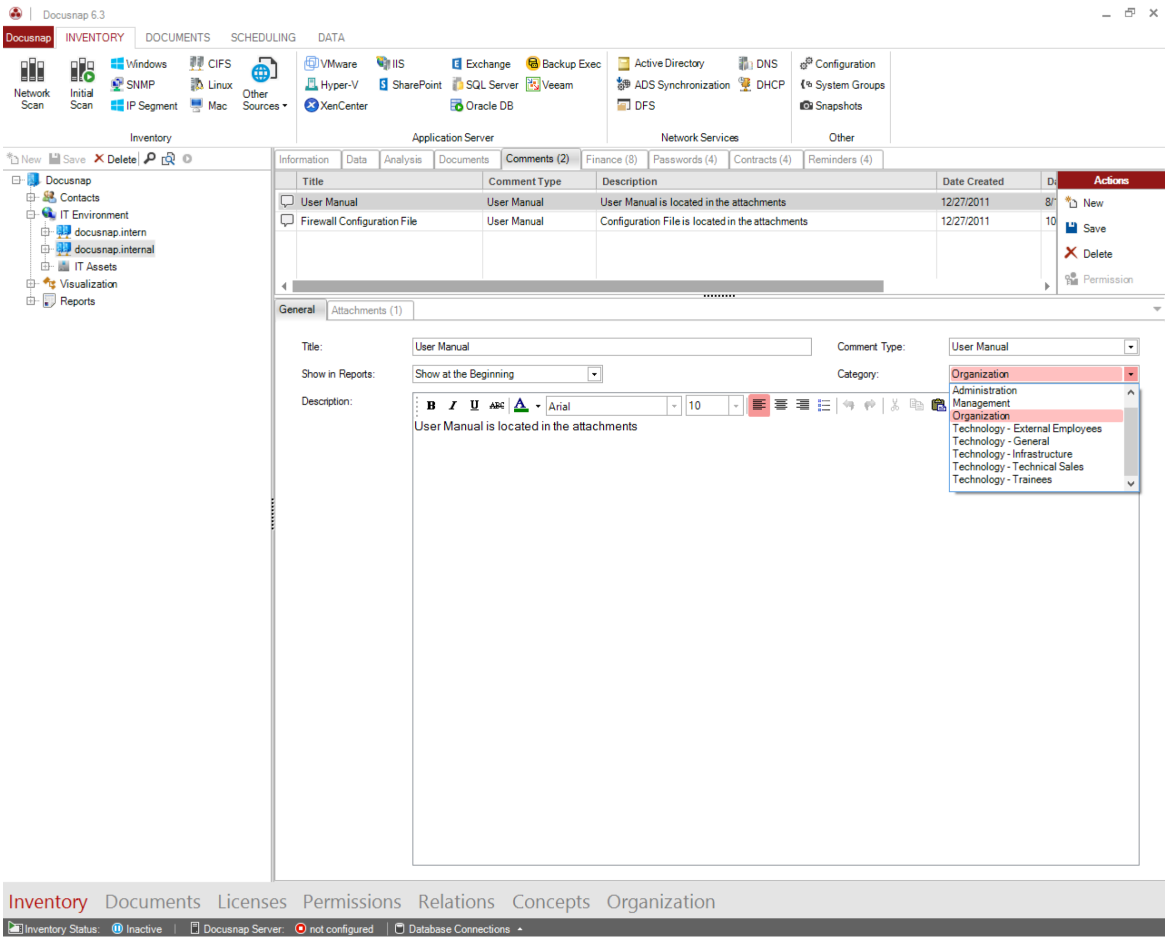


You can set permissions to limit the right to view the password log to particular users.

7.4 Categories and Permissions

To restrict access to the extensions, you can use categories and permissions. The user roles are assigned to categories in the Docusnap Management.

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.



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 *Permission* button. In the *Object Permissions* dialog, you can specify whether a person to whom this role was assigned may *Read, Write, Delete* and / or *Insert* the extension.

Part VIII

8 Relations

The 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.

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.

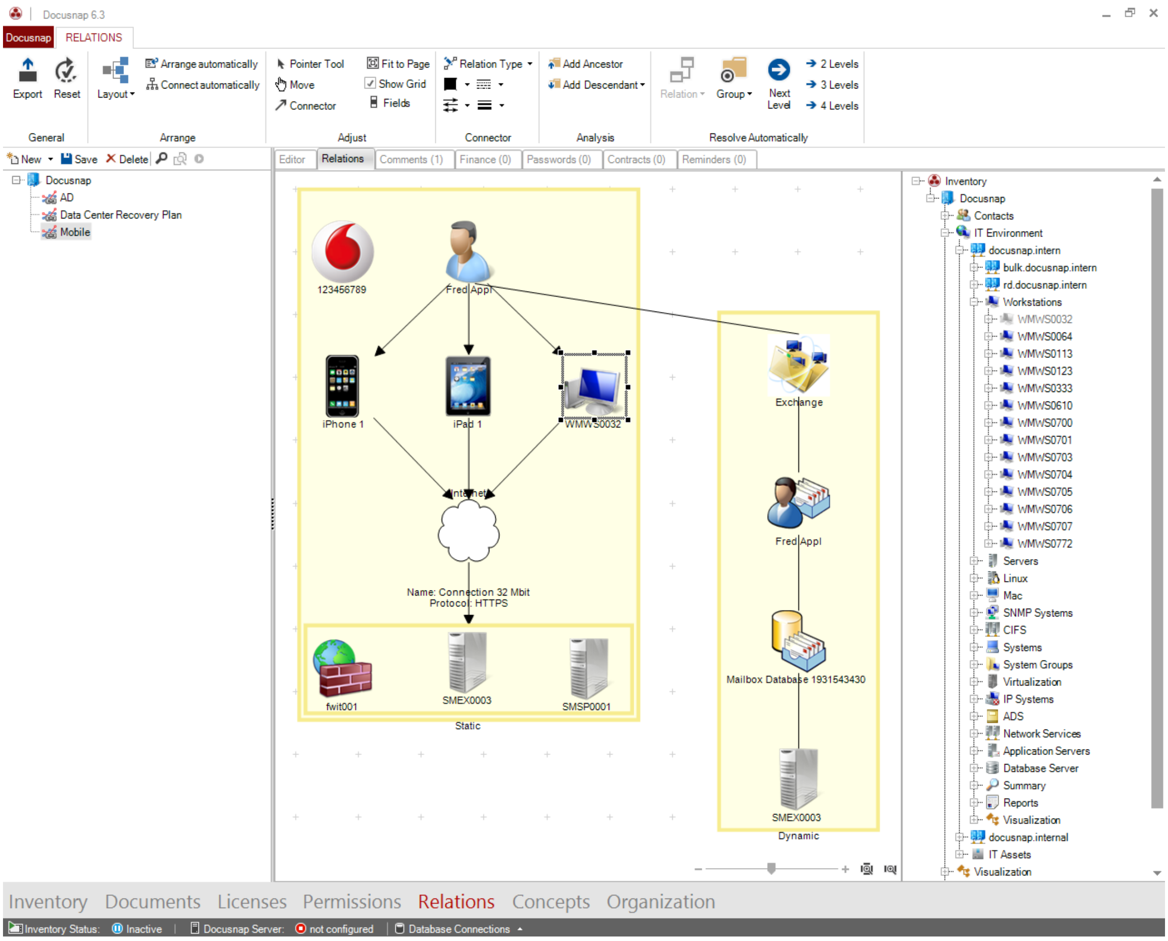
On the communications level, relations help you to determine the various connection types and the protocol used for each connection.

8.1 Create Relations

To create a new relation, navigate to the *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 Relation. Specify a name for the relation. Now you can create a diagram on the *Relations* tab.

The right pane shows the *Inventory* tree. It contains the data from the most recent network inventories.

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



Ribbon

The *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.

Adjust: The *Pointer Tool* allows you to select individual components by a mouse click.
To move the entire diagram, click the *Move* button.
If the *Connector* button has been selected, you can create a *Connector* using the mouse. Click a component and drag the mouse (while holding down the mouse button) to the second component. This will connect the two components.

Clicking the *Fit to Page* button resizes the diagram so that it fits the page.

Connector: The desired type and design for a connector can be selected from the *Connector* group.

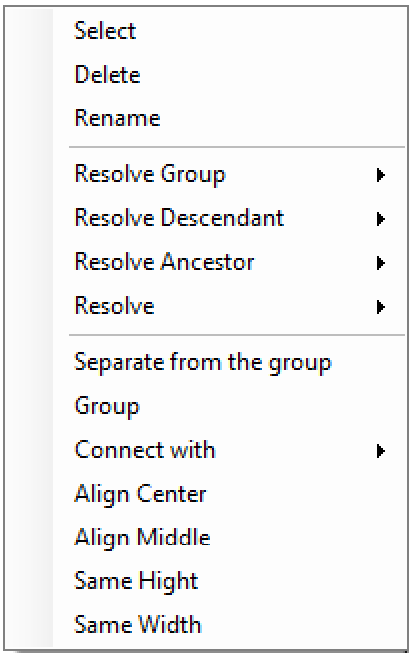
Analyse: Use the *Add Ancestor* and *Add Descendant* to add the hierarchical ancestor and descendants of the selected object.

Resolve Automatically: By clicking the *Relation* button you can add the *IT Correlations* of the selected object.
By clicking the *Group* button you can add groups of *IT Correlations* of the selected object.
By clicking the *Next Level* button or the *2 - 4 Levels* button you can choose how many levels of the *IT Correlations* should be added.

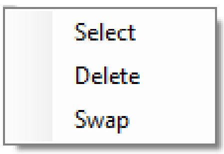
Context Menu

A context menu is available when you right-click the components and connectors.

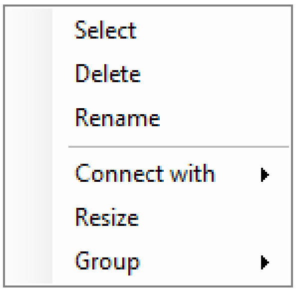
This menu contains options to delete the current object or to connect it with other objects. When selecting multiple objects, you can align them horizontally or vertically or set them to the same height or width. Additionally IT Correlations, ancestors and descendants can be added.



The connectors can be deleted from the context menu. What is more, you can swap the starting and ending points or select a different starting or ending point.



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



Properties

Once a connector has been selected, the *Properties* entry screen appears. Here, you can specify additional information about the selected connector. The properties will be displayed along with the connectors. You can select the properties to be displayed from the *Fields* dialog. Optionally, you can add to the properties by editing the *tRelLink* table. Adding columns to the databases and entry screens is described in the Configuration Manual.

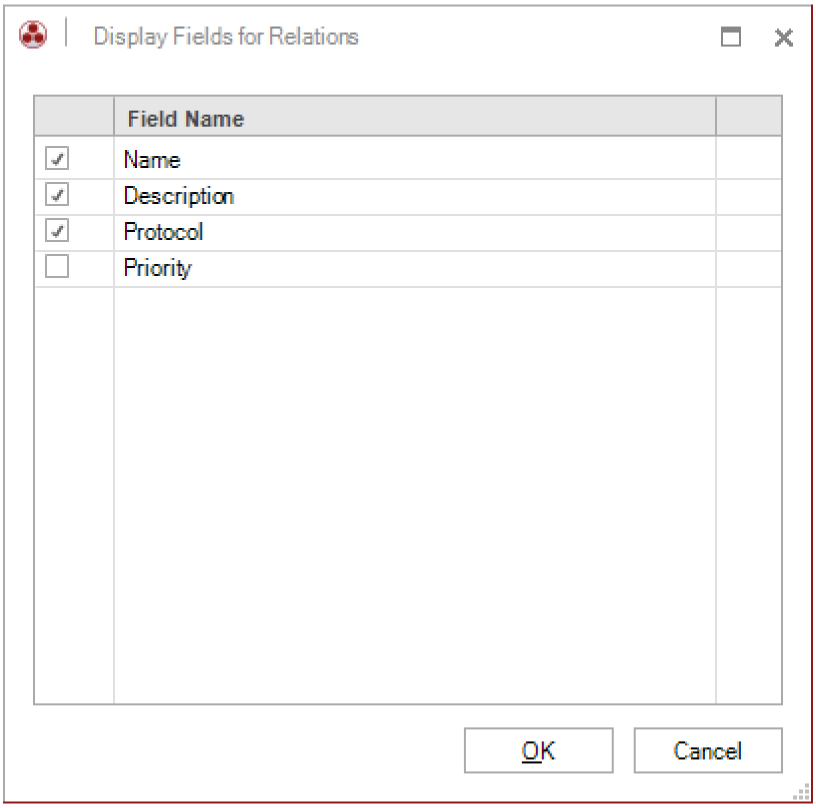
IT Correlations

When creating the relations objects of IT Correlations can also be added. Unlike *Relations* which represent the relationship between two given objects, the *IT Correlations* are defined between two types of objects. The context menu of the added objects lists under *Resolve Relation* entry all IT Correlations and by clicking on it the desired one can be resolved. IT Correlations can also be added by clicking the *Relation* button in the ribbon. Groups can also be added via the context menu and the ribbon.

Additionally the hierarchical ancestors and descendants can be added via the context menu. Click on the entry *Resolve* to select how many levels of IT Correlations should be resolved.

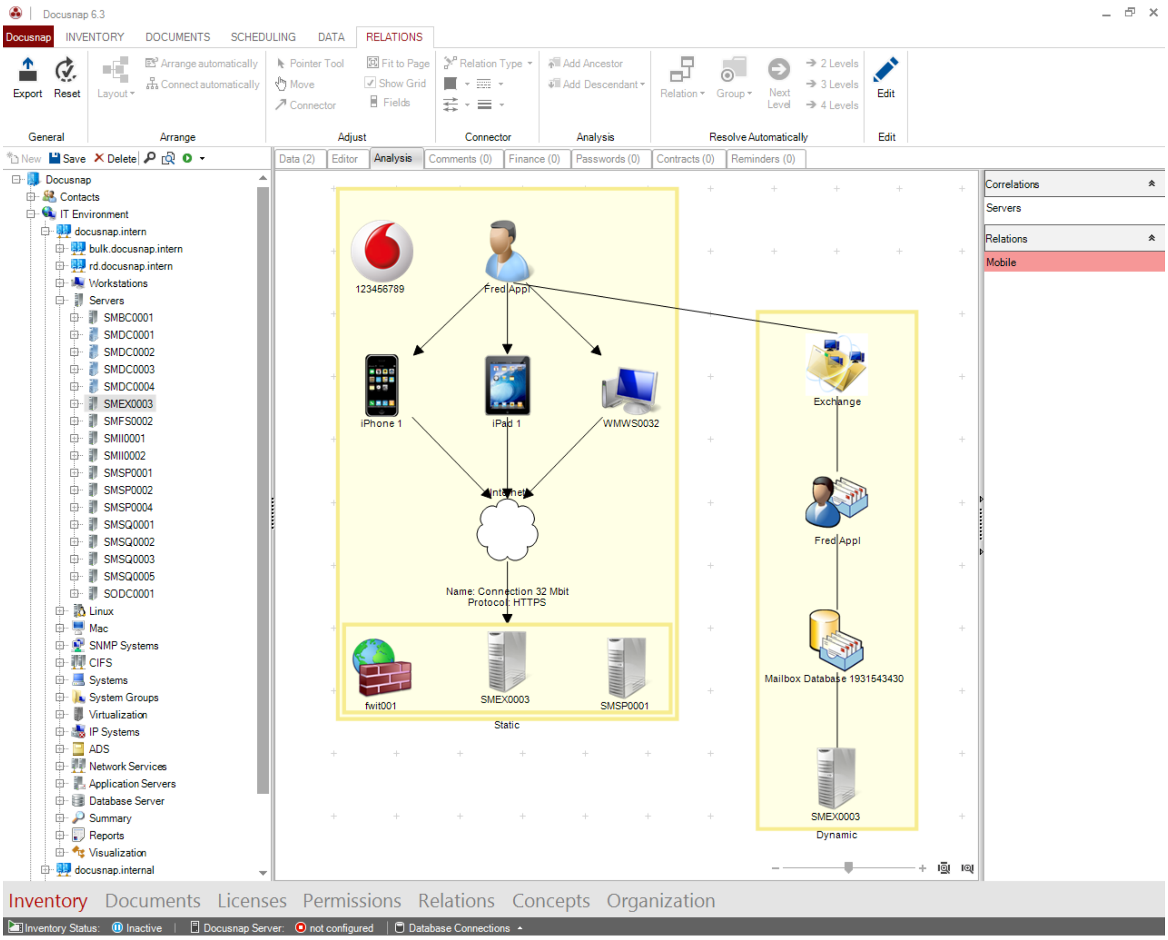
Fields

Each connection has properties, such as a name, a description, a priority, etc. that you can select for display in the relation diagram. Click the *Fields* button in the *Relations* ribbon to open the dialog. For each relation, you can select the fields to be displayed from the *Display Fields for Relations* dialog.



Opening relations from other tree views

The *Analysis* tab is displayed for each object you select in the Data Explorer. If the selected object is used in a diagram, that diagram will be displayed on this tab. In the *Analysis* tab the relation can be exported. To edit the relation click the *Edit* button to open the relation in the Relations tab.



Part IX

9 Concept

The Concepts module in Docusnap allows you to create concepts by using the whole set of retrieved data, associated documentation, and relations so that there is no need for an additional word processor.

What is more, the inventoried data and documentation are always updated to keep the concept current at any time. It is also possible to insert variables, such as the name of a workstation or the last inventory data, into the various text areas.

Once the concept is complete, it can be exported to the desired format (.docx, .pdf, .html, or .rtf) and thus becomes available for further use.

The creation and export of the document can be automated using the *Scheduling* feature, allowing timed updates of the document.

Ribbon

Creating a Concept

Versioning

Templates

Designs

Styles

Export and Scheduling

Assignment

9.1 Menu Ribbon

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

IT Concepts

- Edit: A click on the *Edit* button launches the Concept Editor where you can edit the selected concept.
- Refresh: Use the *Refresh* button to update the concept. This reloads the data for data elements, reports, etc. and recreates the table of contents.

- Export: 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 selected concept.
- Templates: Clicking the *Templates* button opens the *Concept Templates* dialog.
- Assign: Clicking this button opens the *Assign Concept* dialog which allows you to insert the desired concept into other tree views. It is also possible to add a *concept folder* to a node in one of the other trees.
- 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.
- Schedule as Job: Clicking this button opens a wizard which allows you to schedule creation of a concept for a certain date and time.

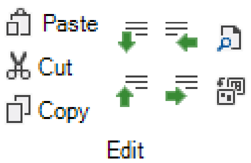
Text Editor

General

- Save: After clicking the *Save* button, you can decide whether to simply save the concept, to save it as a new version, or to save it as a template.
- Refresh: Use the *Refresh* button to update the concept. You can specify whether you would like to refresh the entire concept or just the document outline. A refresh of the entire document reloads the data for data elements, reports, etc. and recreates the table of contents. When you just refresh the document outline, the system recreates the table of contents and reloads the entries in the navigation pane.
- Export: Using the *Export* button, you can export your concept to Word, PDF, or other formats.
- Print: By clicking the *Print* button, you can print the open concept.
- Draft View: By enabling the draft view elements such as reports, plans, relationships, etc. are not completely displayed, only a placeholder is shown at the location at which they were inserted. Thereby the concept has not as many pages and is easier to process.

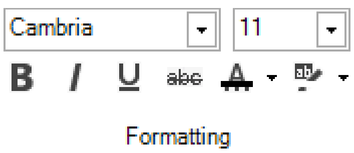
Edit

- Paste: Using the *Paste* button, you can insert elements from the clipboard into the text area.
- Cut: This button allows you to cut selected text elements.
- Copy: This button allows you to copy selected text elements to the clipboard.
- Hierarchical structure: By clicking the arrows, you can change the hierarchical level and order of the headings in your concept.
- Find: The button allows you to find particular parts in the entire text quickly and easily.
- Replace: The button allows you to find and replace certain text parts.



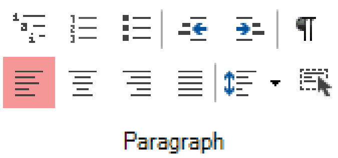
Formatting

This group contains buttons that can be used to change the font, color, and typeface of your text.



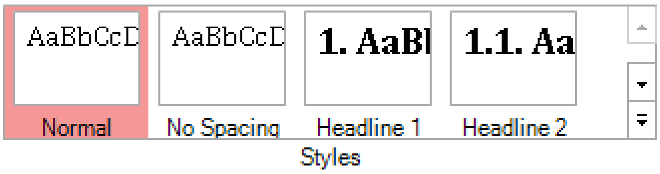
Paragraph

The buttons in the *Paragraph* group allow you to adjust the alignment and formatting of the paragraphs in your text area.



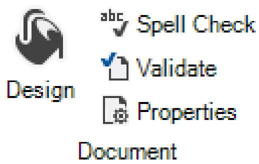
Styles

For text formatting, Styles are available which allow you to edit the text in your entire document in a centralized way. These styles are also needed when creating the table of contents.



Document

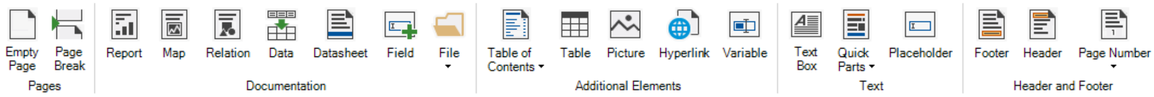
- Design: Clicking the *Design* button opens the *Designs and Styles* dialog. This dialog allows you to individually define the design of your concept.
- Spell Check: Click the *Spell Check* button to start the integrated spell checker.
- Validate: By clicking the *Validate* button, you can check the concept for validity. Any errors found will be displayed in the error list. An error is present if, e.g., an inserted 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 concept. Here, the title and author of the concepts may be changed. You can also enter an additional description. The properties also include additional information such as the date when the concept was last modified.



Insert

Use the Insert ribbon to insert different elements into your concept.

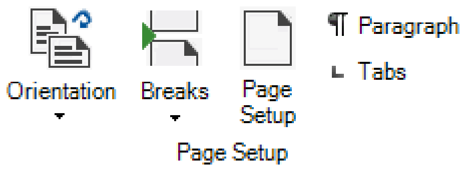
- Header and Footer: Use the Header or Footer button to open an additional tab where you can specify your header and footer settings.



Page Layout

- Orientation: The options below this button can be used to specify portrait or landscape format.
- Breaks: Click the *Breaks* button to insert a page break. Two different types of page breaks, i.e. *Continuous* and *Next Page* can be selected.
- Page Setup: Click the *Page Setup* button to adjust the margins, paper size, header and footer, columns, and borders of your document.
- Paragraph: This button opens a dialog that allows you to change the formatting, indents, frame, and page breaks of your document.

- Tabs: This button opens the *Tabs* dialog where you can set and change various indents.

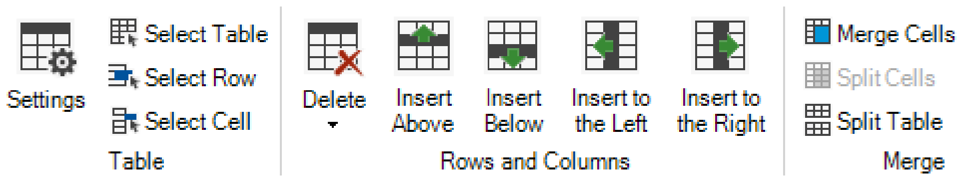


Data Elements

If you highlight a certain element such as a map, a 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.
- Draft View: By enabling the draft view the selected element is not completely displayed, only a placeholder is shown at the location at which it was inserted.

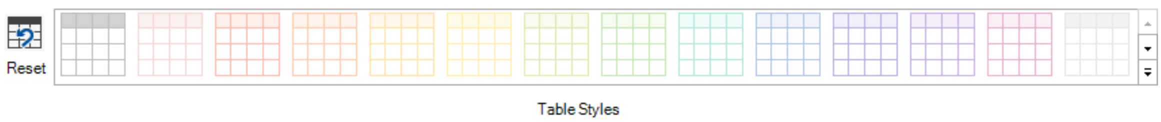
Table Tools



The Table Tools ribbon display when you insert a new table or select an existing table.

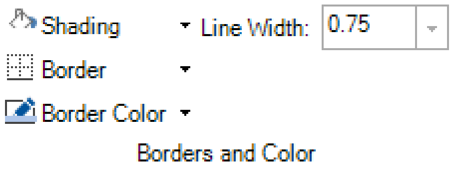
Table Styles

Various styles are available for tables. Click the little arrows next to the buttons and select the desired basic shading for your table.



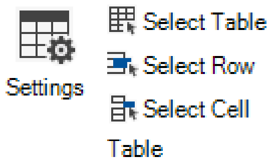
Borders and Color

In the *Borders and Color* group, you can select the shading, border color, border, and line width for the selected part of the table.



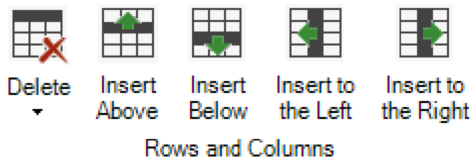
Table

- Settings: Here, you can change table properties such as the distance from text or the cell height.
- Select Table: Click the *Select Table* button to select the entire table.
- Select Row; Select Cell: These two buttons can be used to select the row or cell where the cursor is currently placed.



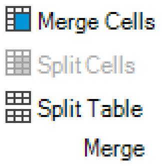
Rows and Columns

- Delete Table; Delete Columns; Delete Rows: These options can be used to delete the entire table, selected columns, or selected rows. These options display when you click the *Delete* button.
- Insert Above; Insert Below; Insert to the Left; Insert to the Right: These four buttons can be used to insert more columns and lines into an existing table.

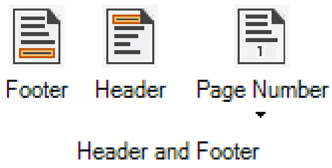


Merge

- Merge Cells: Click this button to merge the selected cells into one.
- Split Cells: Clicking this button allows you to split the highlighted merged cell again.
- Split Table: Click this button to split the existing table into two.



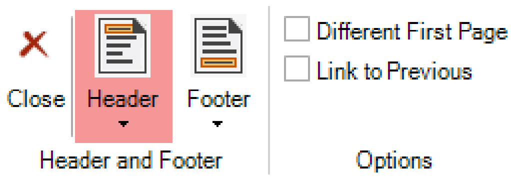
Header and Footer



This ribbon allows you to create headers and footers.

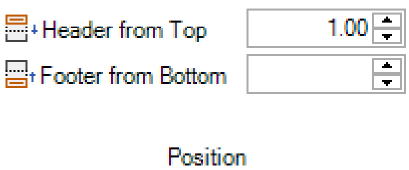
Header and Footer

- Close: Click this button to end the editing of your headers and footers. You are taken back to the *General* ribbon.
- Header; Footer: Use these buttons to enable, disable and modify your headers and footers.
- Different First Page: Tick this checkbox to create a special header and footer for the first page of your document.
- Link to Previous: If you enable the *Link to Previous* feature, a document with multiple sections will always use the header and / or footer of the previous section.



Position

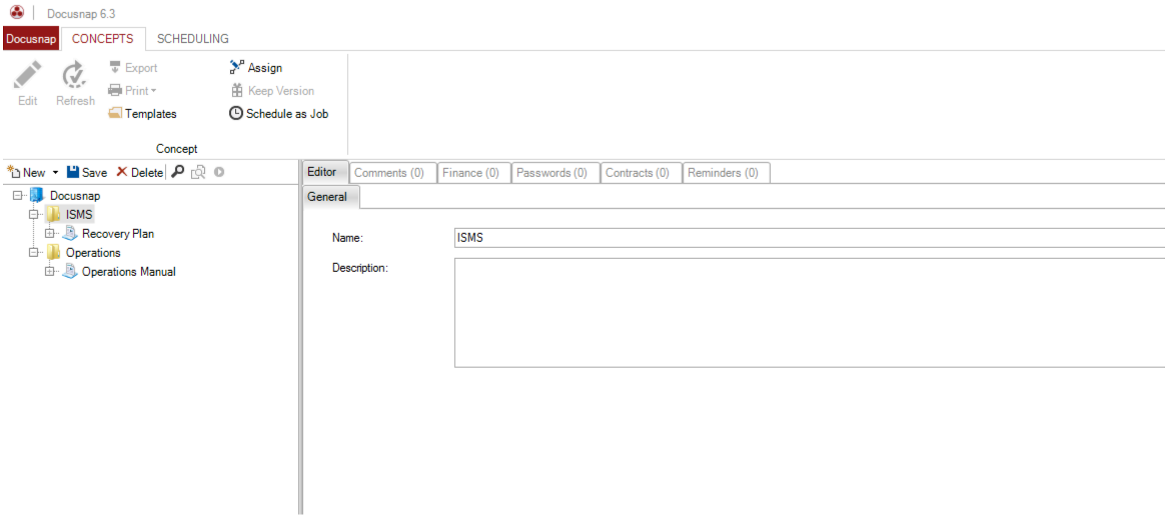
In the *Position* group, you can change the position of your headers and / or footers.



9.2 Create Concept

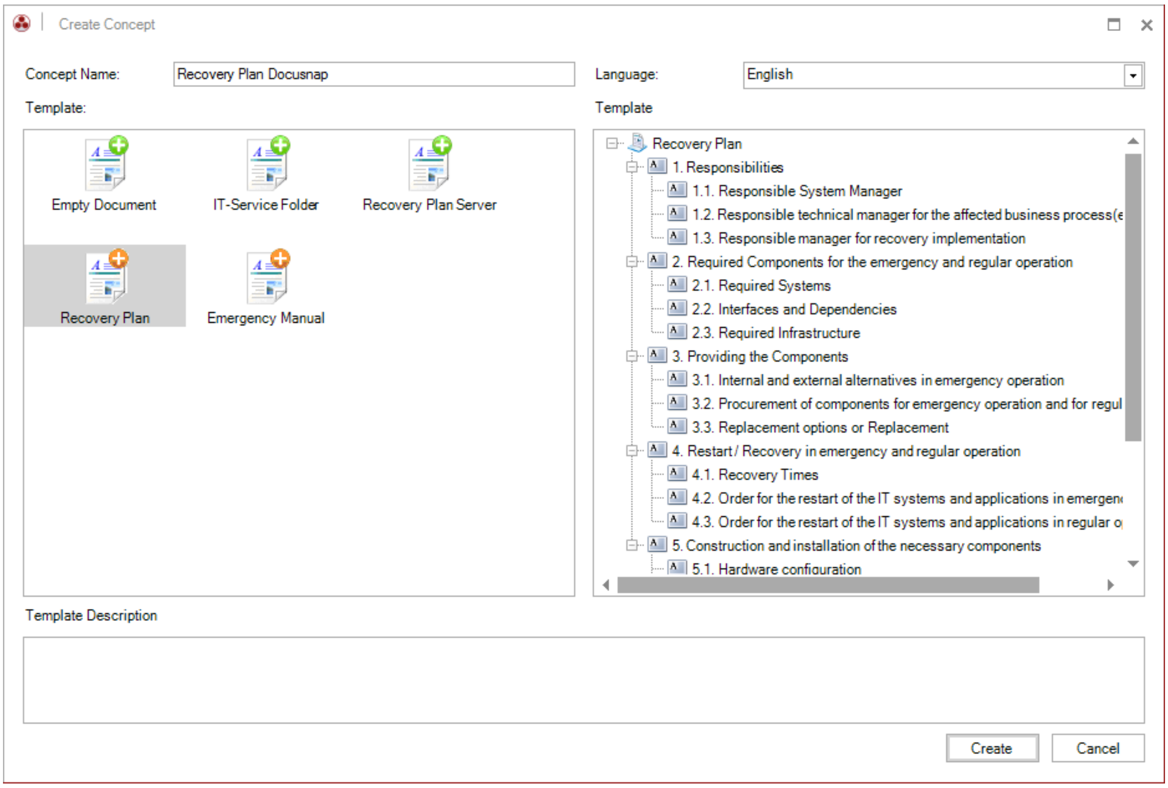
To create a new concept, change to the *Concepts* module. You can either create a directory below the company where the concepts will be stored or integrate your concepts directly below the company.

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



To create a new concept, you must either select 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 Concept*.

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



Concepts are created and managed in Docusnap. For editing concepts, the Concept Editor is available.

9.2.1 General

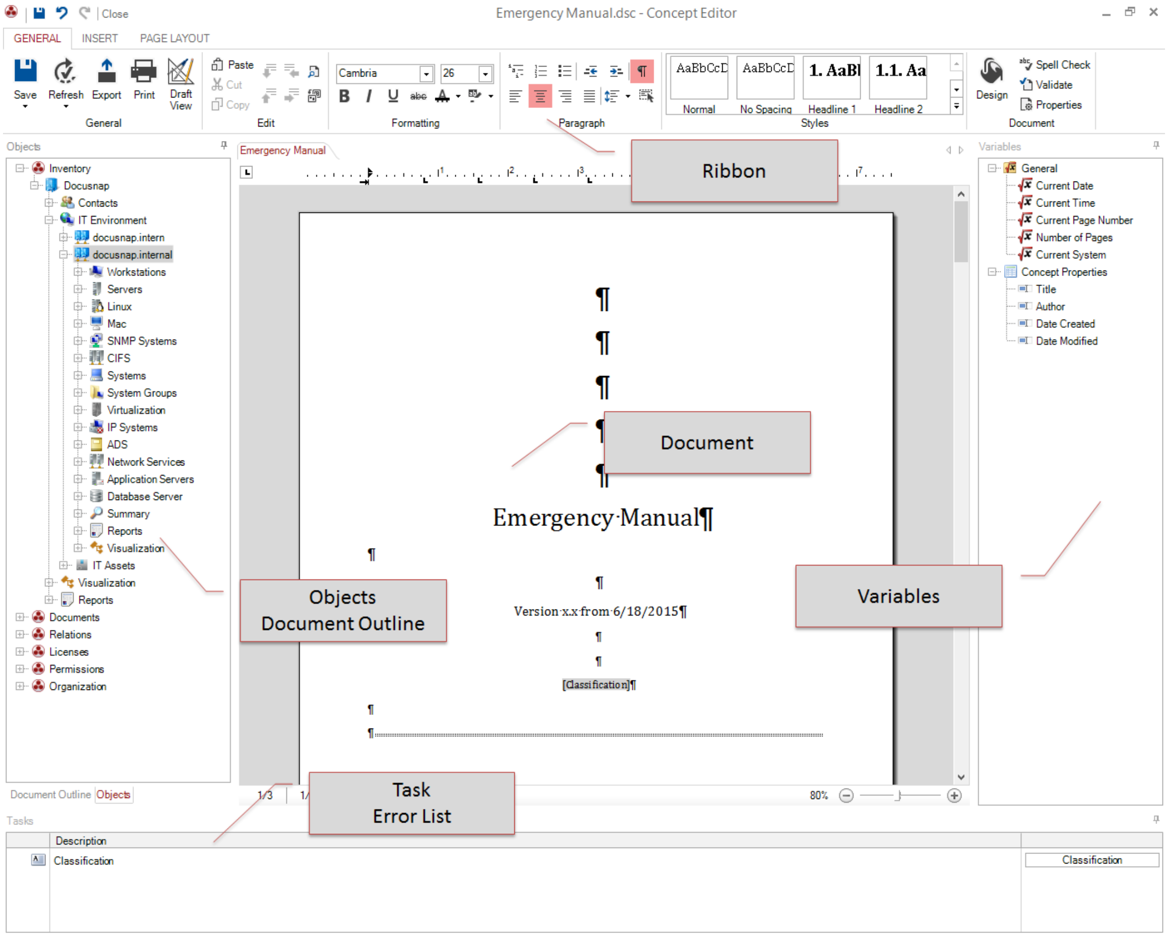
When you create a concept, the files are stored in the directory you have selected for concepts in the *Options* dialog. To enable multiple persons to work on the same concepts, you can select to store the concepts on a network drive. Every concept is assigned to a single company set up in a database. Once Docusnap is connected to this database, the corresponding concepts are displayed in the Explorer.

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

The various elements can be inserted either through the buttons located on the *Insert* ribbon or per drag & drop them from the object tree. For some elements such as maps, overviews, or data, further settings can be selected. To access the settings, either click the *Settings* button, select *Edit* from the context menu of the respective element, or double-click the element. The *Settings* button is located in an additional ribbon which is displayed as soon as you select the element in the document.

9.2.2 Concept Editor

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



Ribbons

The Ribbons allow you to define the settings for formatting, content, and view, etc. of your concept.

Document

Use the document area to create your concept. In this area, you can enter the text and drag all elements such as reports, data elements, etc. there.

Objects

The *Objects* window displays all Explorers from the various modules. From this area, you can drag documents, reports, data elements, etc. and drop them into your concept.

Document Outline

The *Document Outline* window lists the headings to which one of the *Headline* styles is assigned. By clicking on a heading here, you can jump to the corresponding section in your document. This way, it is easier to navigate in your document, especially if it is large.

Variables

The *Variables* window provides variables you can insert into your concept. The variables can also be inserted by clicking the *Variable* button from the *Insert* ribbon.

Tasks

If Placeholders were defined for a document, a description of each placeholder will be displayed in the *Tasks* window. Click the respective button in the *Tasks* window to open the selection window for data which is available for this placeholder. Once you have selected the data, it replaces the placeholder.

Error List

By clicking the *Validate* button, you can check the concept for validity. Any errors found will be displayed in the error list. An error is present if, e.g., an inserted relation was deleted or if a report does not exist any longer.

Layout

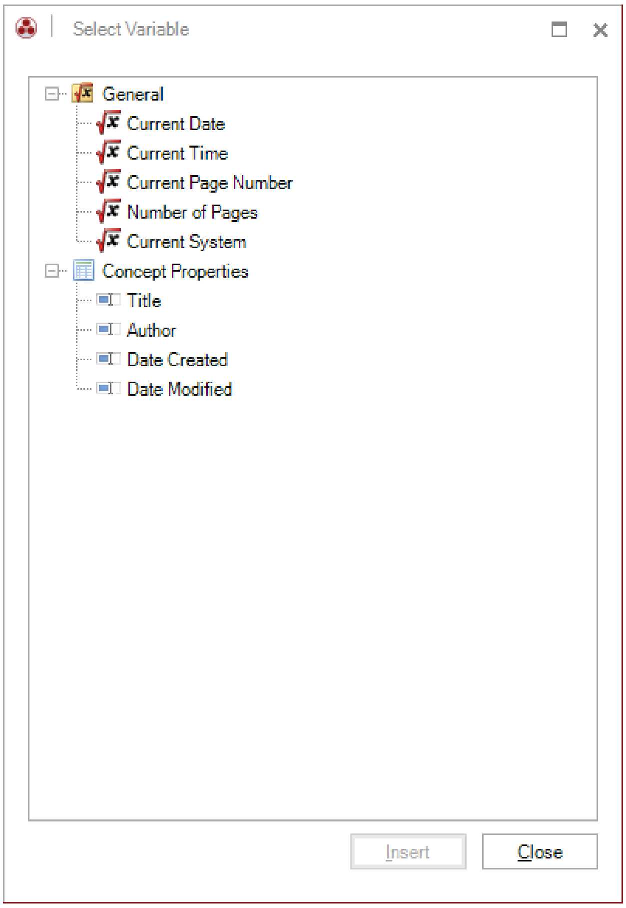
The windows can be arranged as desired by dragging and dropping. The position of each window is saved locally and will be remembered each time you open the Concept Editor.

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 concept such as the author or the creation date in your concept. Clicking the *Variable* button on the Insert ribbon opens a dialog where you can select the desired variable.



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

Header and Footer

You can also add headers and footers to your concept. Use the *Header* and *Footer* buttons to open the additional *Header and Footer* ribbon.

Clicking the *Header* button opens a header area in the document where you can enter the desired data. Proceed the same way for creating footers. To format your entries, use the existing ribbons.

By enabling the *Different First Page* option, a different header and/or footer can be created for the first page of the concept. If section breaks are inserted, the headers and footers on the first page of each section can be designed differently.

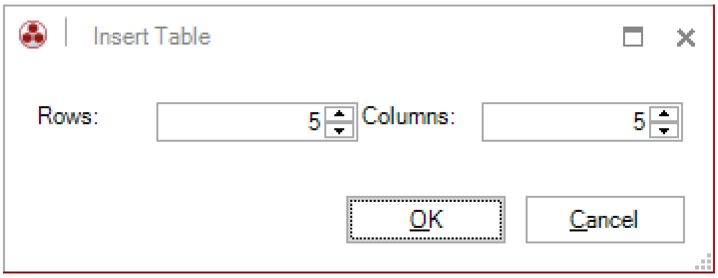
If a concept has multiple sections, you can enable the *Link to Previous* checkbox to use the header and/or footer from the previous section for the current header and/or footer.

The fields in the *Position* group can be used to change the header or footer position.

When you have completed the header and/or footer, you can close the ribbon by clicking the *Close* button and continue working in the text area.

Inserting tables

It is possible to insert tables into your concept. To do so, click the *Table* button. The *Insert Table* dialog opens.



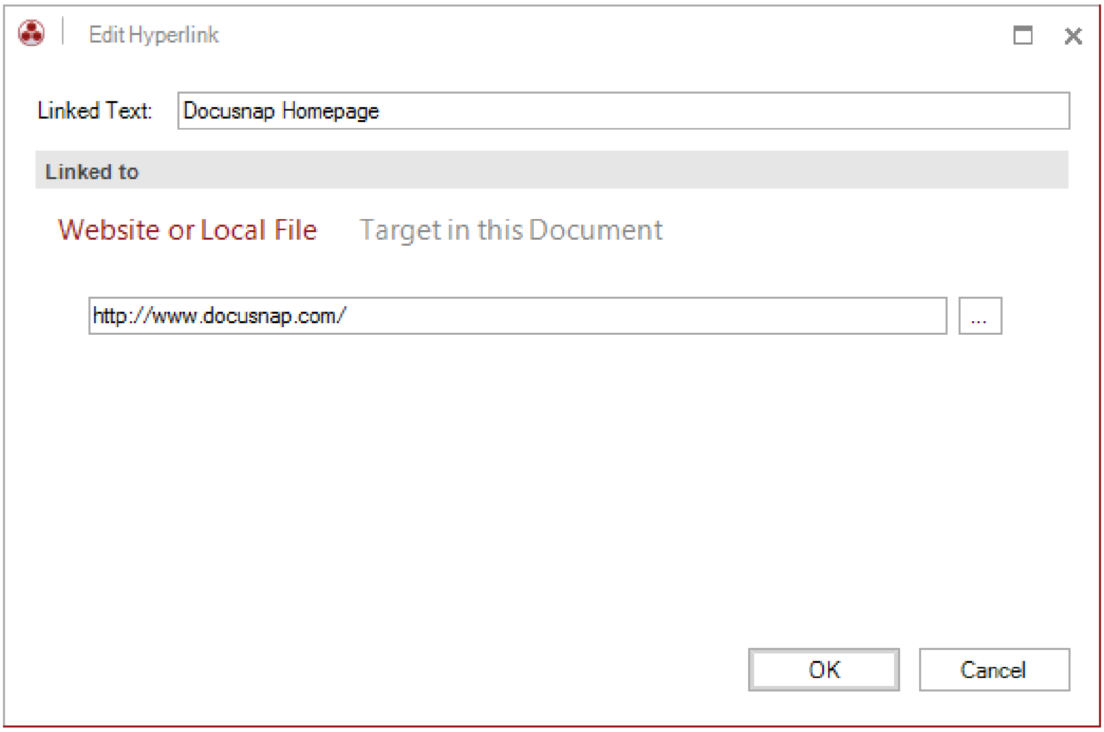
Here, you can specify the number of rows and columns for the table. Once you have created the table, the *Table Tools* ribbon becomes available to edit it.

Other buttons to modify the table such as options to insert columns or rows or to delete columns, rows or the entire table can also be found in the *Table Tools* ribbon.

Inserting Hyperlinks

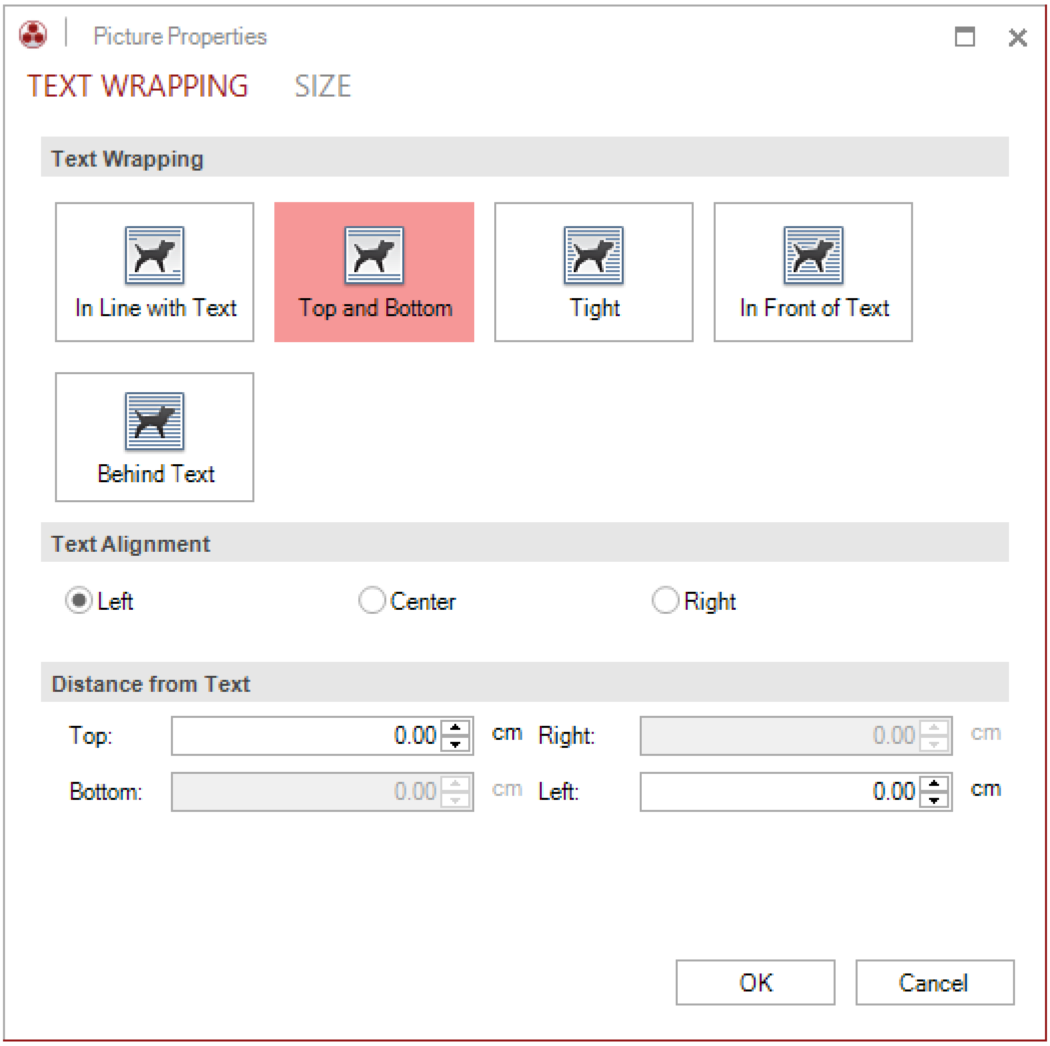
Click the *Hyperlink* button to open the *Edit Hyperlink* dialog. In the uppermost field, enter the text to be linked. On the *Website or Local File* tab, you can either enter a URL or select a locally saved file. On the *Target in this Document* tab, you can select a heading from the current concept to be linked.

After creating the hyperlink, you can use the *Settings* option from the context menu of the hyperlink to open the *Edit Hyperlink* dialog.



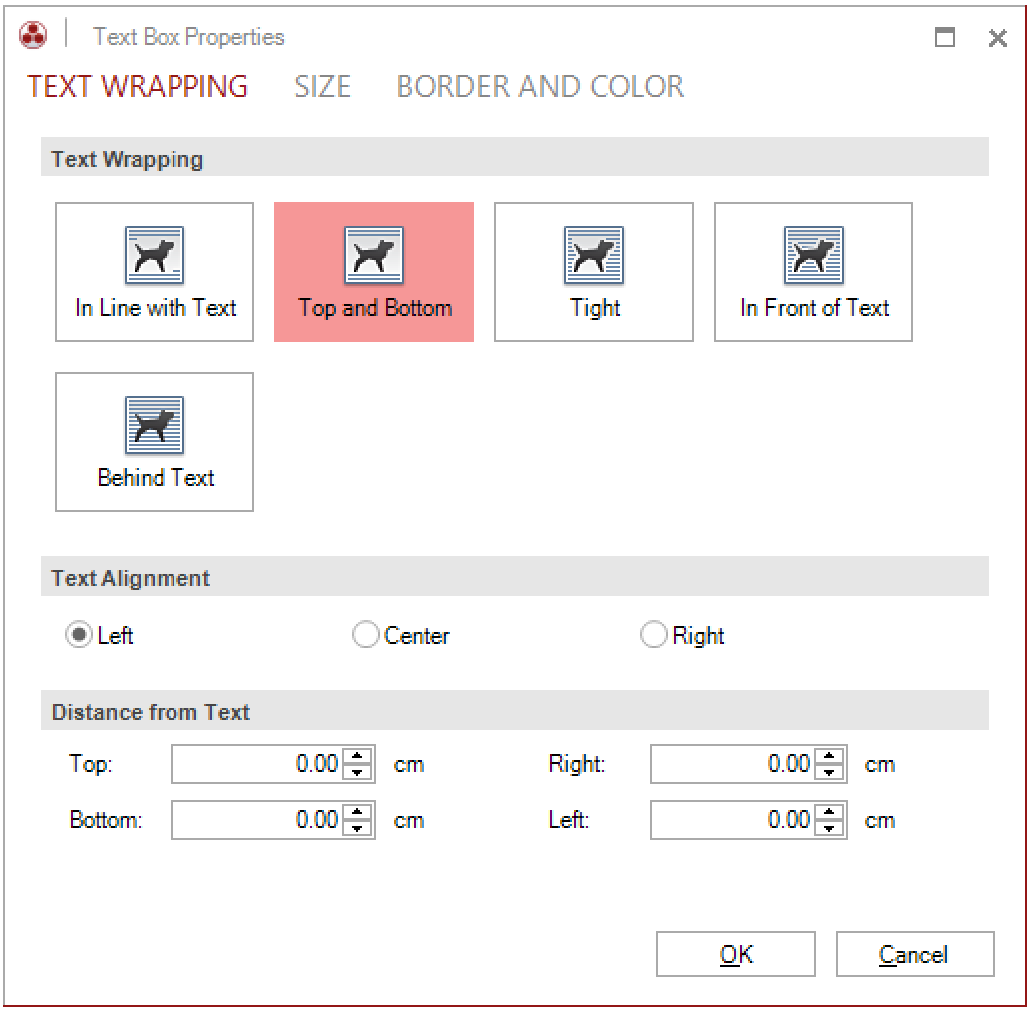
Picture

It is possible to add pictures to your concept. Click the *Picture* button to open a dialog where you can select a picture file to be inserted into the document. When you select the picture, the additional *Picture Tools* ribbon displays. To change the properties of a picture, either click the *Settings* button in the *Picture Tools* ribbon or select *Settings* from the context menu of the picture.



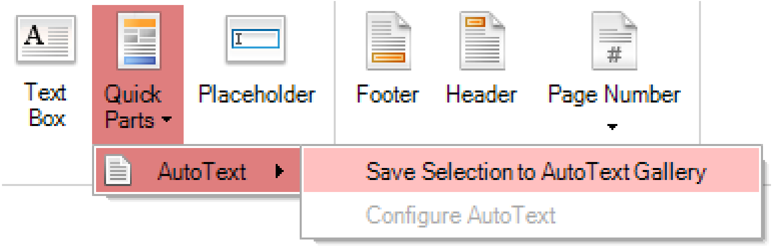
Text Box

To add a text box, click the *Text Box* button. A text box is an object which allows you to place and enter text at any desired location in the document. When you select a text box, the additional *Text Box* ribbon displays. To change the properties of a text box, either click the *Settings* button in the *Text Box* ribbon or select *Settings* from the context menu of the text box.



Quick Parts

Quick parts are stored, reusable contents which can be accessed repeatedly. You can store AutoText in the AutoText gallery by selecting the text to be reused, clicking *AutoText,* and then clicking *Save Selection to AutoText Gallery*. This opens the *Enter AutoText Title* dialog. The name you enter here will be listed in in the AutoText submenu where it is available for selection. The text saved under this name can be re-inserted as desired.

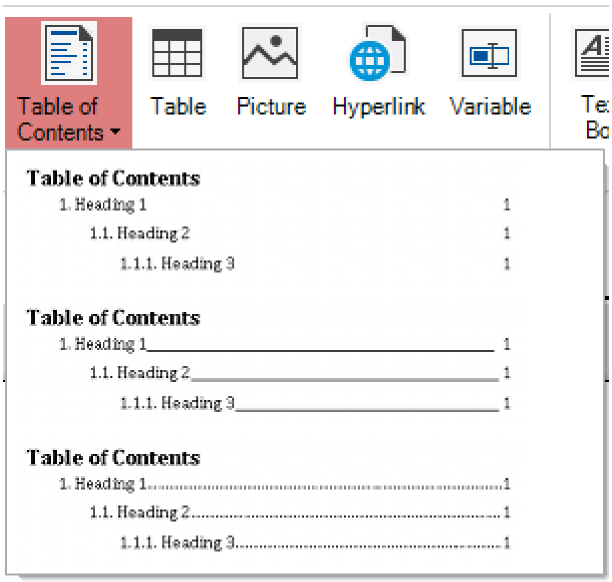


By clicking *AutoText* and then selecting *Configure AutoText*, you can open the dialog for managing the existing AutoText items.

9.2.4 Table of Contents

Click the *Table of Contents* button to add a table of contents to your concept. The captions of the individual elements are listed in the table of contents together with their page number. To create a table of contents, you must apply heading styles to the text you want to include, e.g. Headline 1, Headline 2, etc. The Concept Editor scans the concept for these headings and then generates the table of contents.

When you click the *Table of Contents* button, various designs are displayed that can be selected for the table of contents.

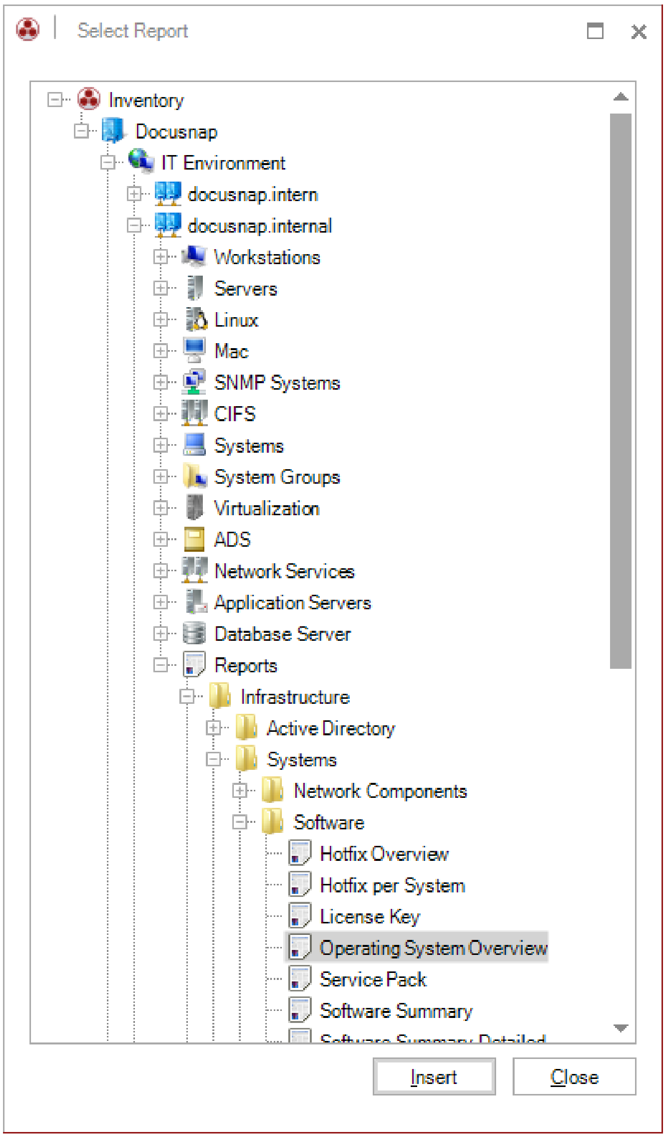


To update the table of contents, click the *Refresh* button in the *General* ribbon.

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 concept.

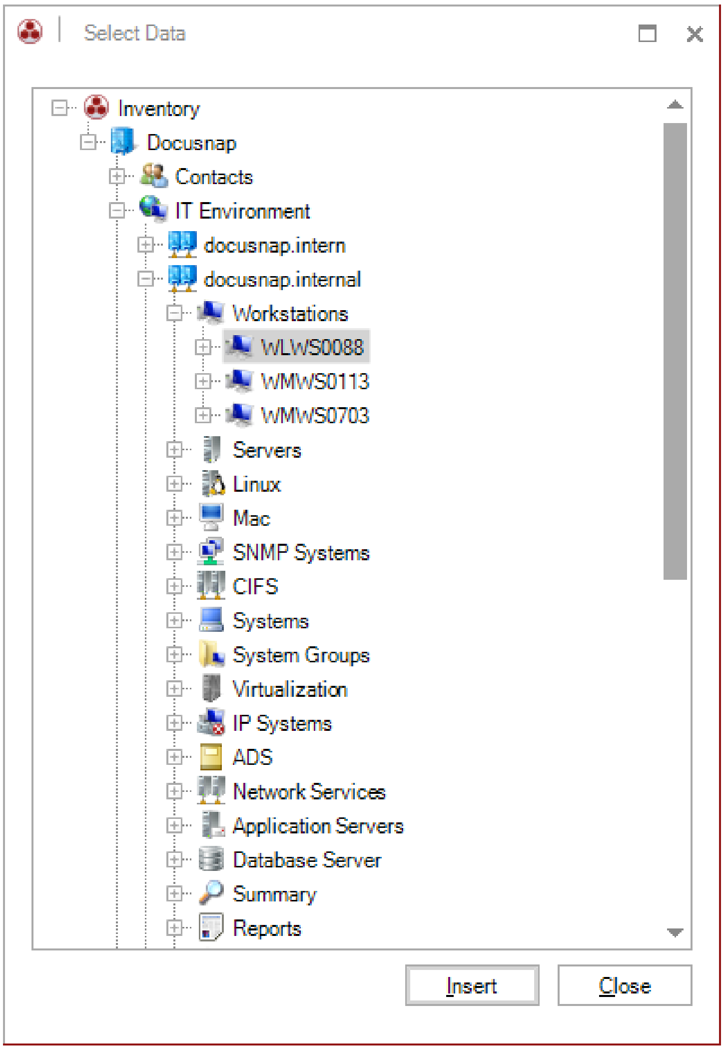
To insert a report into the document, either click the *Report* button from the *Insert* ribbon or can drag it from the object tree and drop it directly onto the desired location in the document.



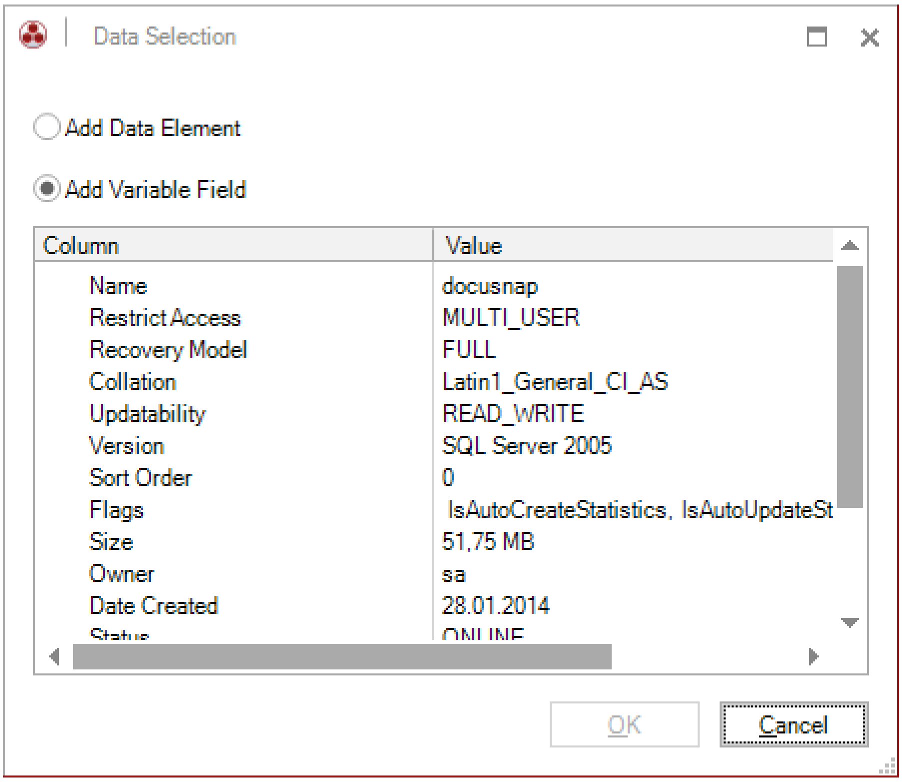
9.2.6 Data Element

You can insert current data from Docusnap into the concept. This loads table content into the concept. Any changes to the dataset automatically update the content.

Click the *Data* button to open the *Select Data* dialog. This dialog displays the existing trees and allows you to select the desired data. If you want to add the workstations table, for example, select the *Workstations* heading and click the *Insert* button to insert the data into the concept.

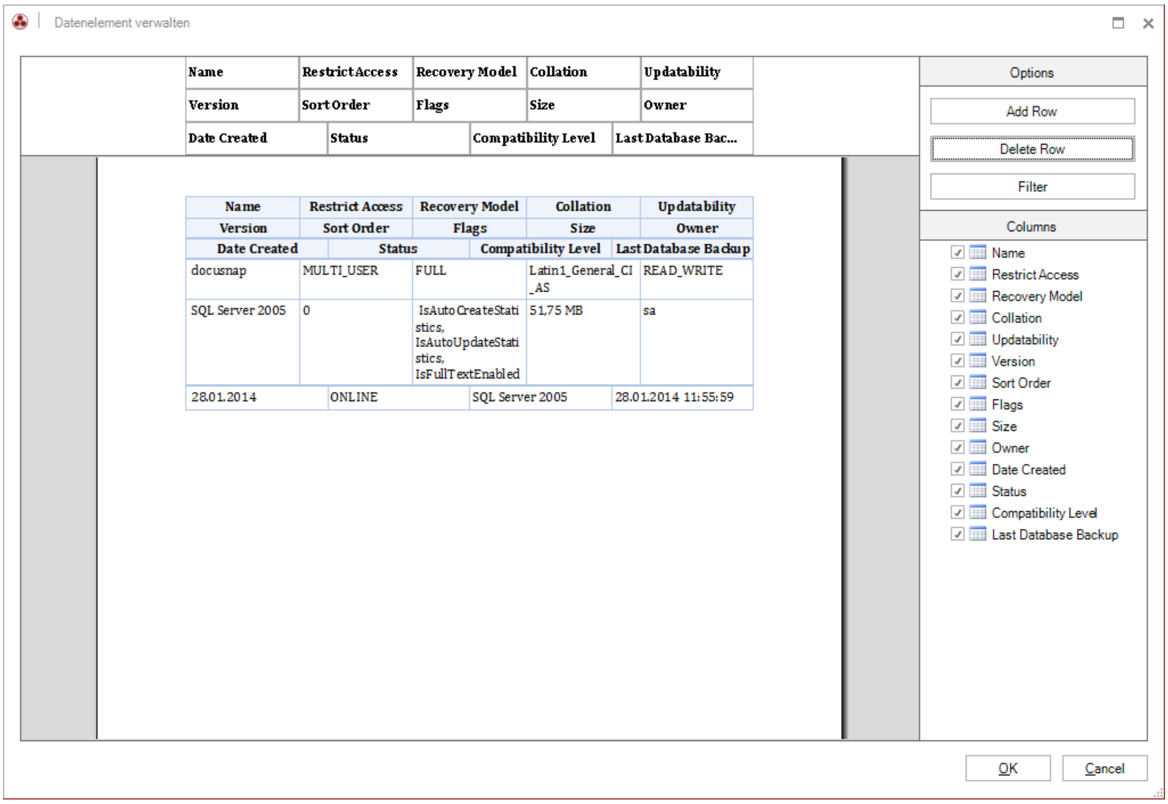


Alternatively, you also can select the desired table content from the *Objects* window and insert it by drag & drop. When you drag data from the object tree and drop it onto the concept, the *Data Selection* dialog opens. In this dialog, you can select to add a data element or a variable value.

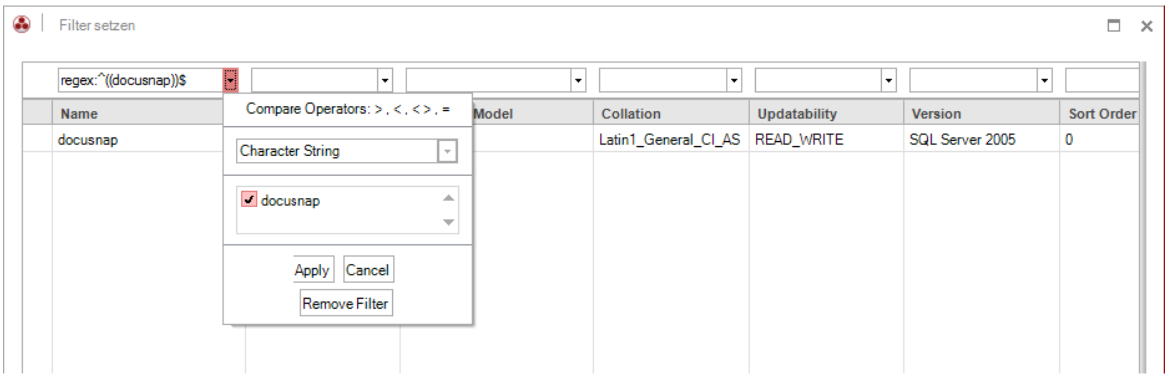


After the table with its data has been inserted into the concept, you can adjust the way its content will be output. When you select the data element, an additional *Data Element* ribbon displays. By clicking the *Settings* button or by selecting the *Settings* option in the context menu of the data element, you can open the *Manage Data Elements* window. You can drag and drop columns to a different position. The *Add Row* button allows you to add another row. You can move the columns to this row. By clicking the *Delete Row* button, you can remove the bottom row and distribute the columns which are still part of that row to the remaining rows.

With the *Column Options* button, you can select the columns to be displayed.



The filter allows you to filter the data that will be displayed in the IT concept. The filter options shown here are similar to the filter in the main window.



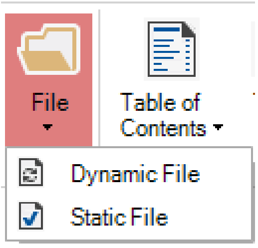
9.2.7 File

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. XML files are imported as readable plain text.

Inserting PDF files, however, only works to a limited extent. After a PDF file has been inserted, it will be displayed, but not necessarily with its correct formatting. PDF files do not usually contain any information about the order of text, text flow, etc. Docusnap extracts and converts all of the text it can find, adds missing spaces and paragraph breaks, and re-sorts the various text blocks and images, so that they appear in their logical order.

There are two different ways to insert files: To select the desired way, first click the *File* button and then select the desired option.



Dynamic File

When you insert a file as a dynamic file, its content is invariable. This method is advantageous in that the inserted file will be updated within the concept if the underlying original file is modified.

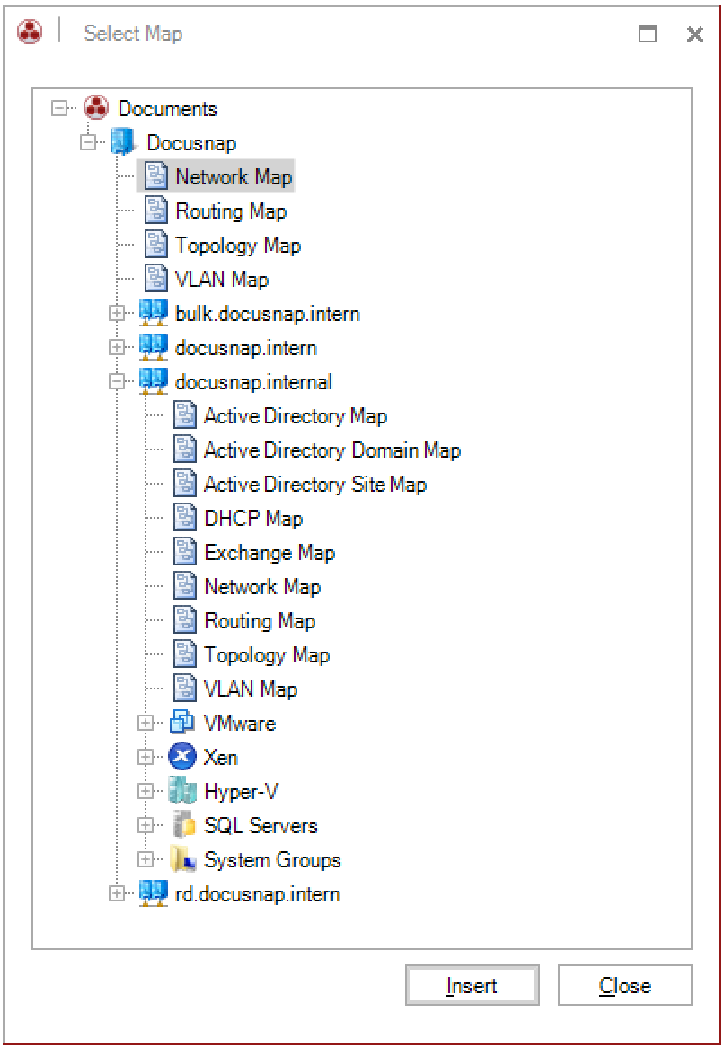
Static File

When you insert a file as a static file, its content is added and can subsequently be modified. In this case, changes to the original file will not be reflected in the concept.

9.2.8 Map

Maps can also be integrated into a concept.

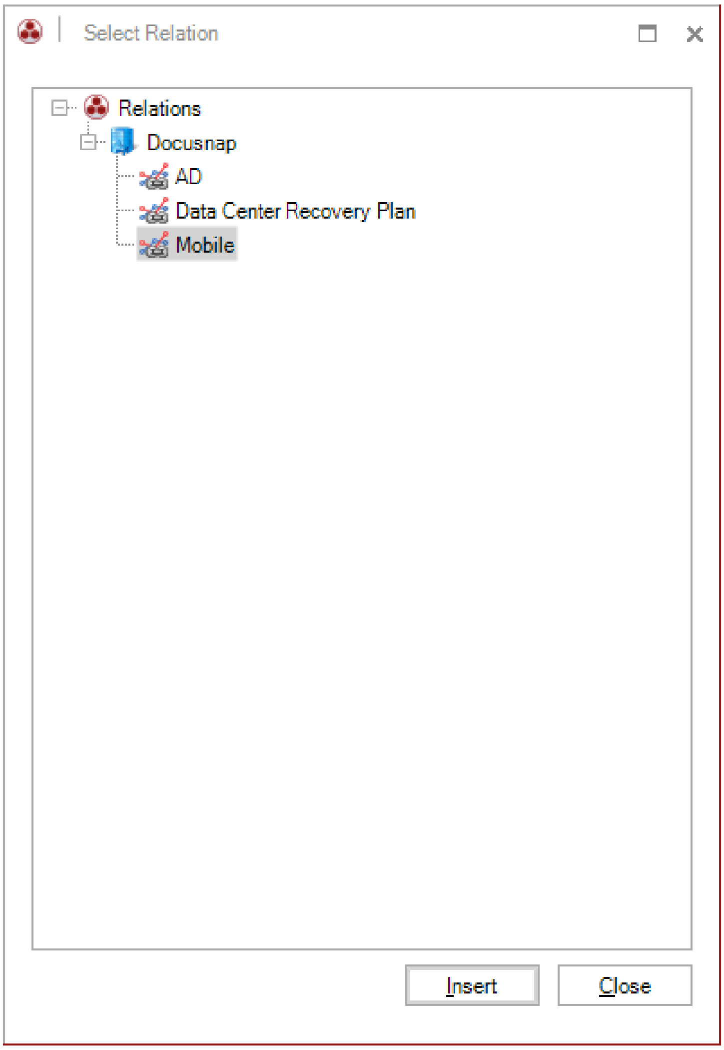
Click the *Map* button in the *Insert* ribbon to open the *Select Map* dialog. Here, you can select a map by expanding the *Documents* node and selecting the desired map. Then, click the *Insert* button to open the associated *Documentation* wizard. Now, you can create the map as described in the Documentation section. The settings you specify in the wizard are only used to create this map within the concept. They do not affect the maps generated previously in the *Documents* module. If you want to modify a map you generated previously, select it and click the *Settings* button to reopen the map generation wizard. This allows you to modify existing map properties. It is also possible to drag and drop the map onto the output element. This action also opens the map generation wizard.



9.2.9 Relation

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

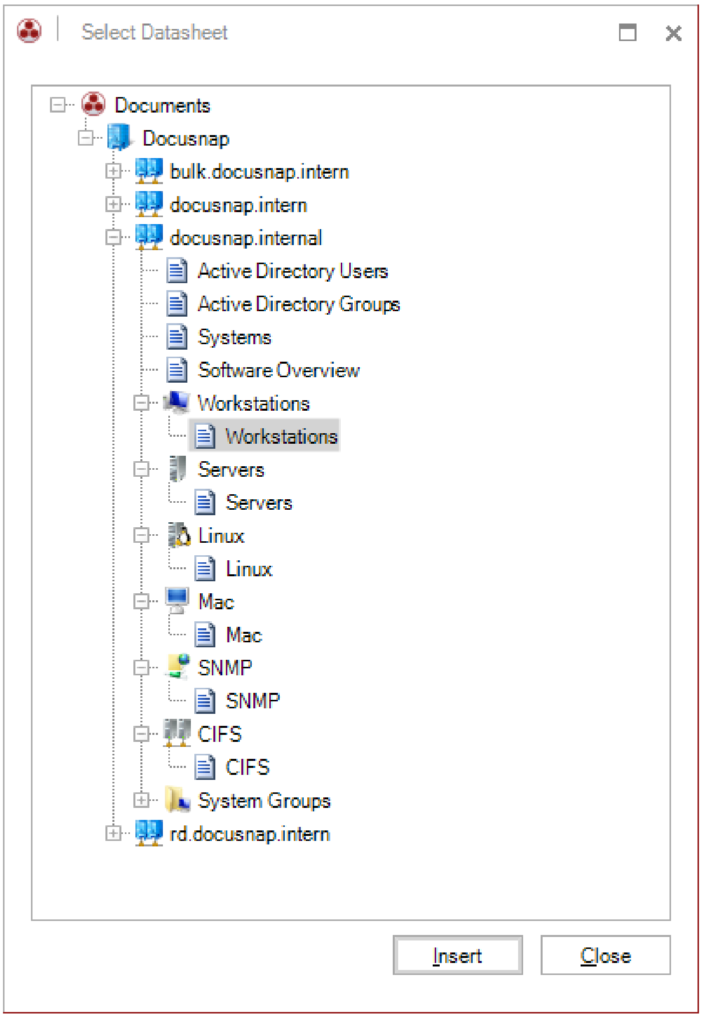
Click the *Relation* button on the *Insert* ribbon to open the *Select Relation* dialog. There, you can select a relation from the *Relations* explorer. To add the relation to your concept, select it and click the *Insert* button.



9.2.10 Datasheet

Overviews and datasheets can also be embedded into a concept.

Click the *Datasheet* button to open the *Select Datasheet* dialog. Here, you can select the desired overview or datasheet. This opens the associated documentation wizard. The datasheets or overviews can be created as described in the Documentation chapter. The settings in the wizard are used for creating the respective overview or datasheet in the output element and do not affect the existing overviews and datasheets in the *Documents* module.



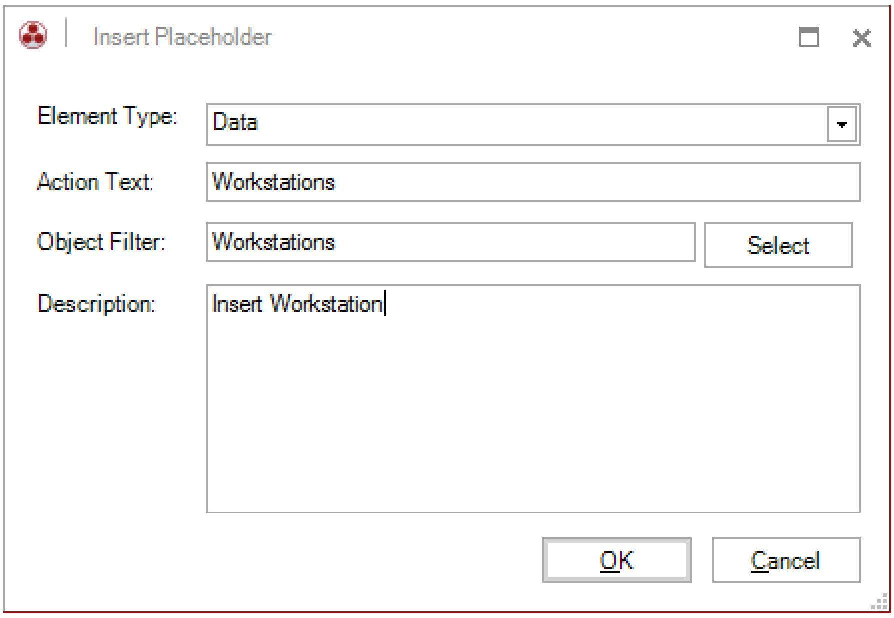
If you want to modify this new datasheet or overview, click the *Settings* button to reopen the Documentation wizard where you can generate datasheets or overviews. This allows you to modify existing properties. You can also drag a map or a datasheet and drop it onto the document. This will also open the *Documentation* wizard.

9.2.11 Placeholder

Using placeholders, you can identify the locations where particular information should be inserted. This allows you to define a structure a user should follow when creating a concept.

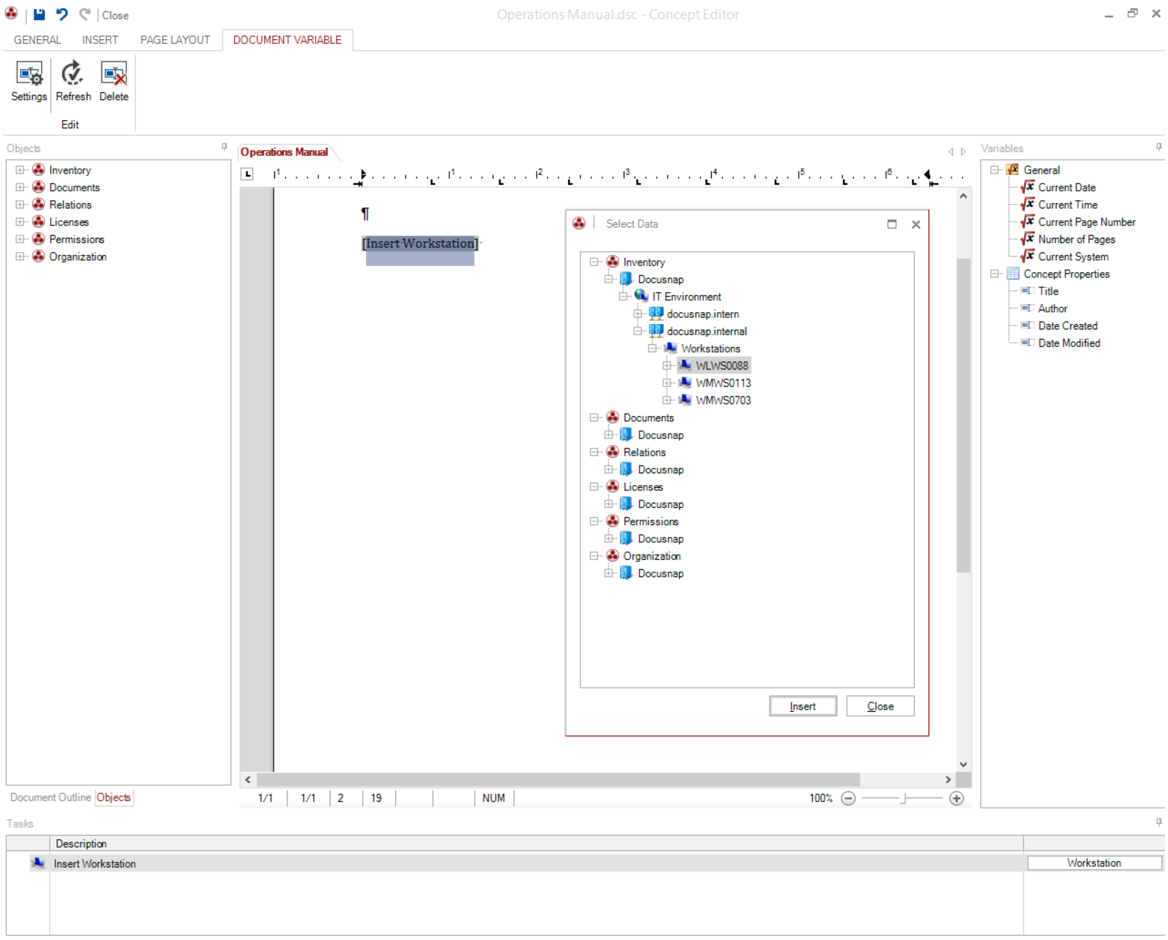
Creating Placeholders

Click the *Placeholder* button in the *Insert* ribbon to open the *Insert Placeholder* dialog. A placeholder can be defined for data, reports, maps, text, etc. Select the desired type from the *Element Type* dropdown list. The action text you specify is 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.



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.



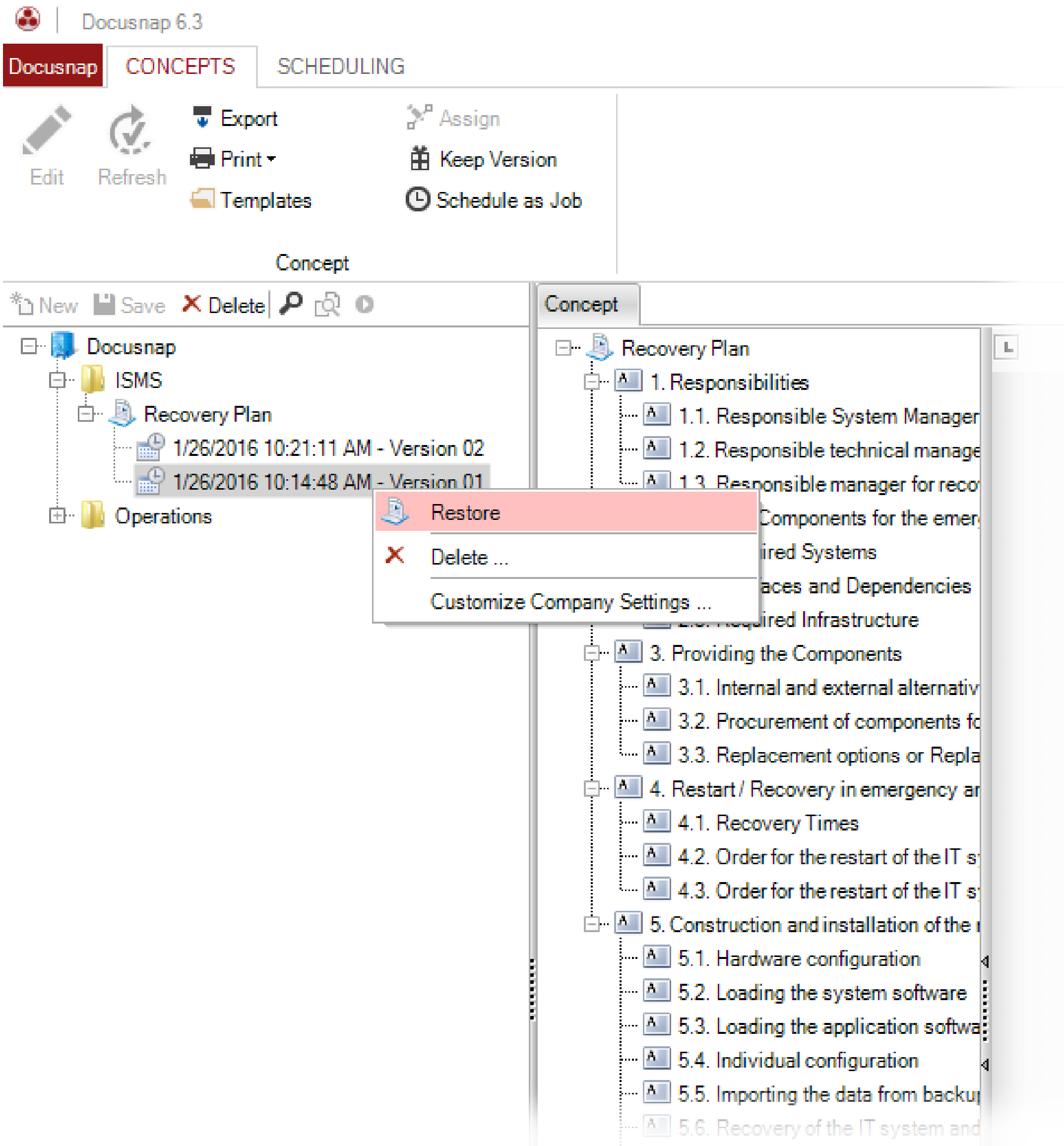
9.3 Versions

To save a concept, click the *Save* button. This opens a submenu where you can decide whether to simply save the concept, to save it as a new version, or to save it as a template. When you select *As New Version*, the current state of the concept will be saved as a separate version. Versions are displayed together with their save date below the concept node in the Docusnap tree view. You can also enter an additional description. This description is displayed behind the version.

For each concept, you may create up to ten different versions. When this number is reached and you save a new version, the oldest version will be deleted. 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.

Restore

By right-clicking on a version it can be restored. Thus, the current concept is discarded and the selected version can be edited. The restored version will remain.



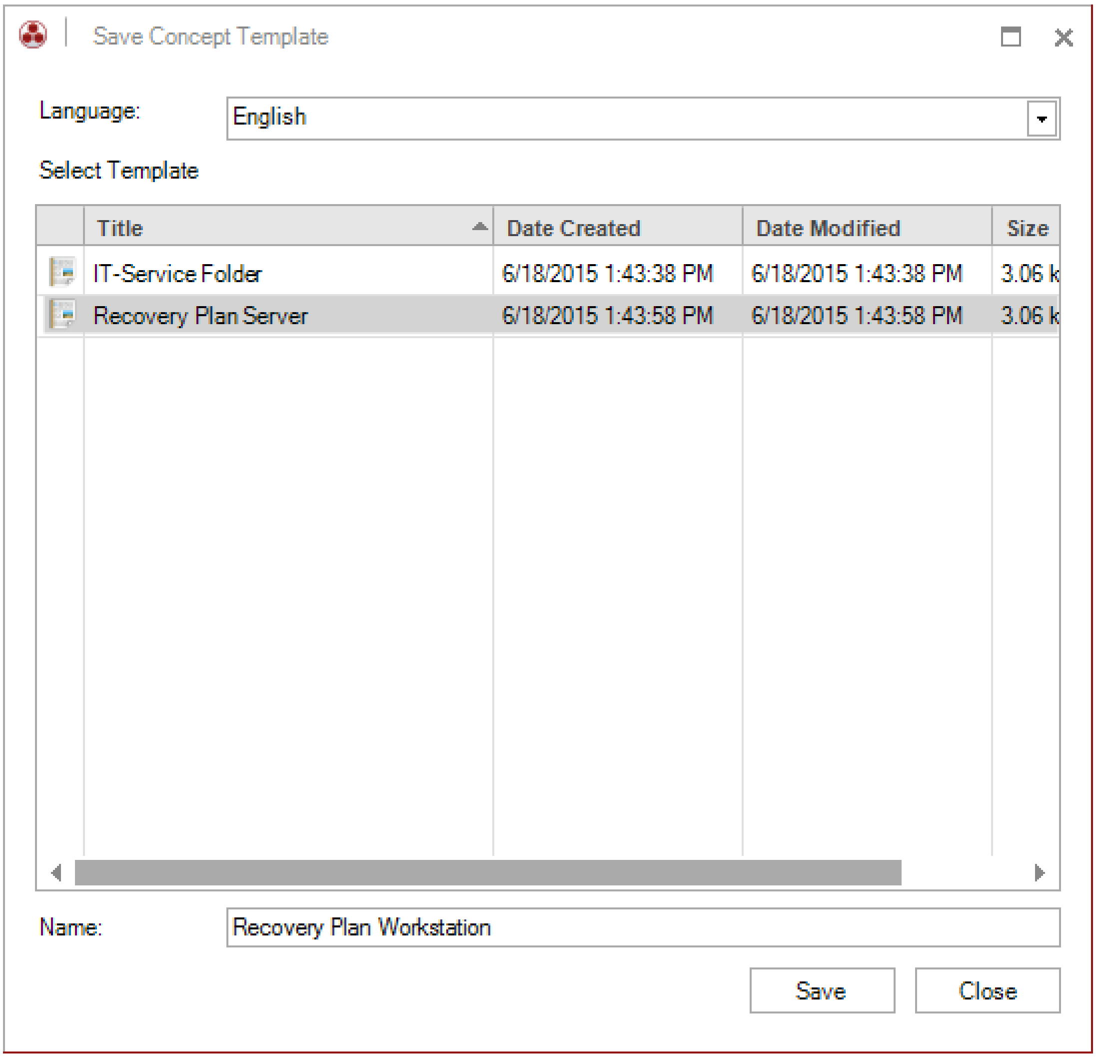
9.4 Templates

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

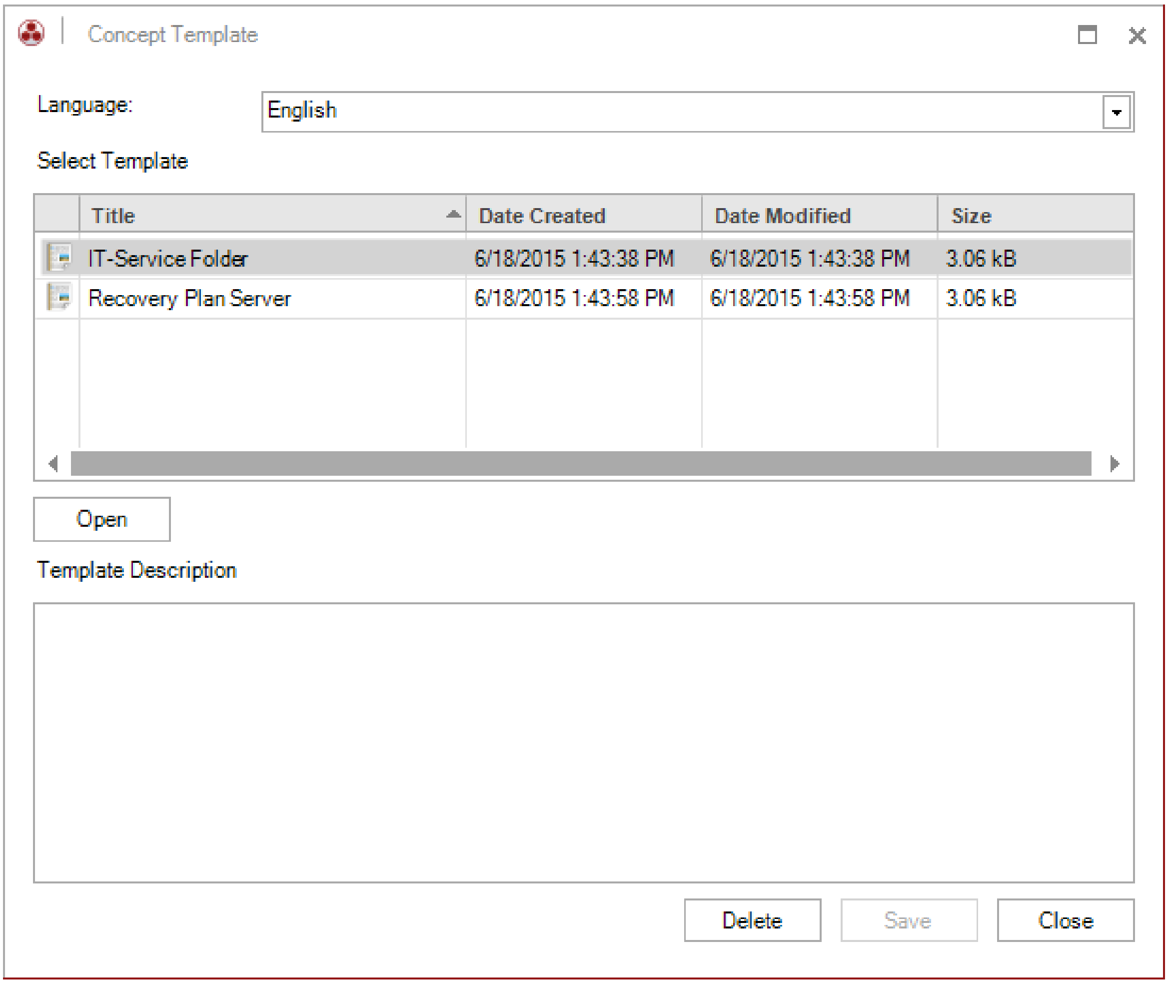
After creating your concept, you can it save as a template for further concepts. After a click on the *Save* button, you can select *As Template* to open the *Save Concept Template* dialog. Enter a name for the template in this dialog. The template will then be saved to the *ITConceptTemplates* folder 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 which is selected in the *Language* field. After entering the name, you can save the template which will then be available when creating new concepts.



Manage Concept Templates

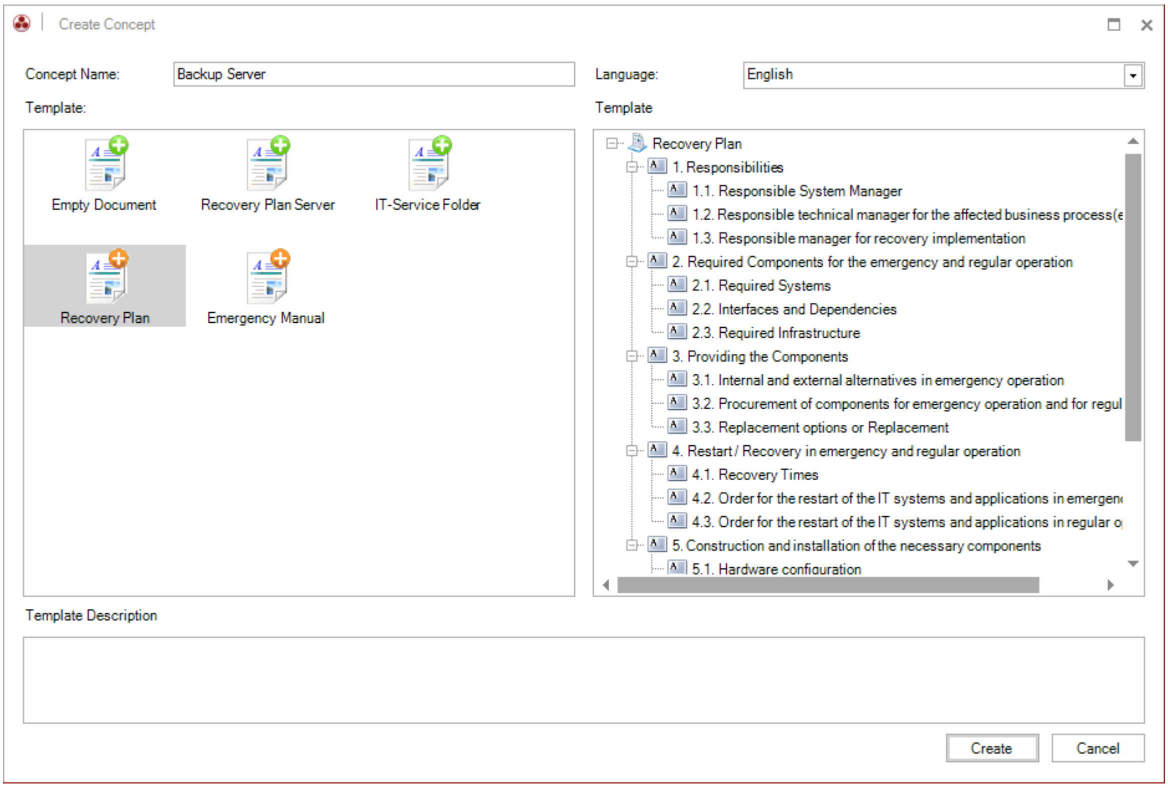
Existing templates can be deleted from the *Concept Template* dialog that can be opened by clicking *Templates* from the *Concepts* ribbon. In addition, you can add a description to each template. Use the *Language* drop-down list to select the German or the English templates to be listed.



Creating a Document from a Template

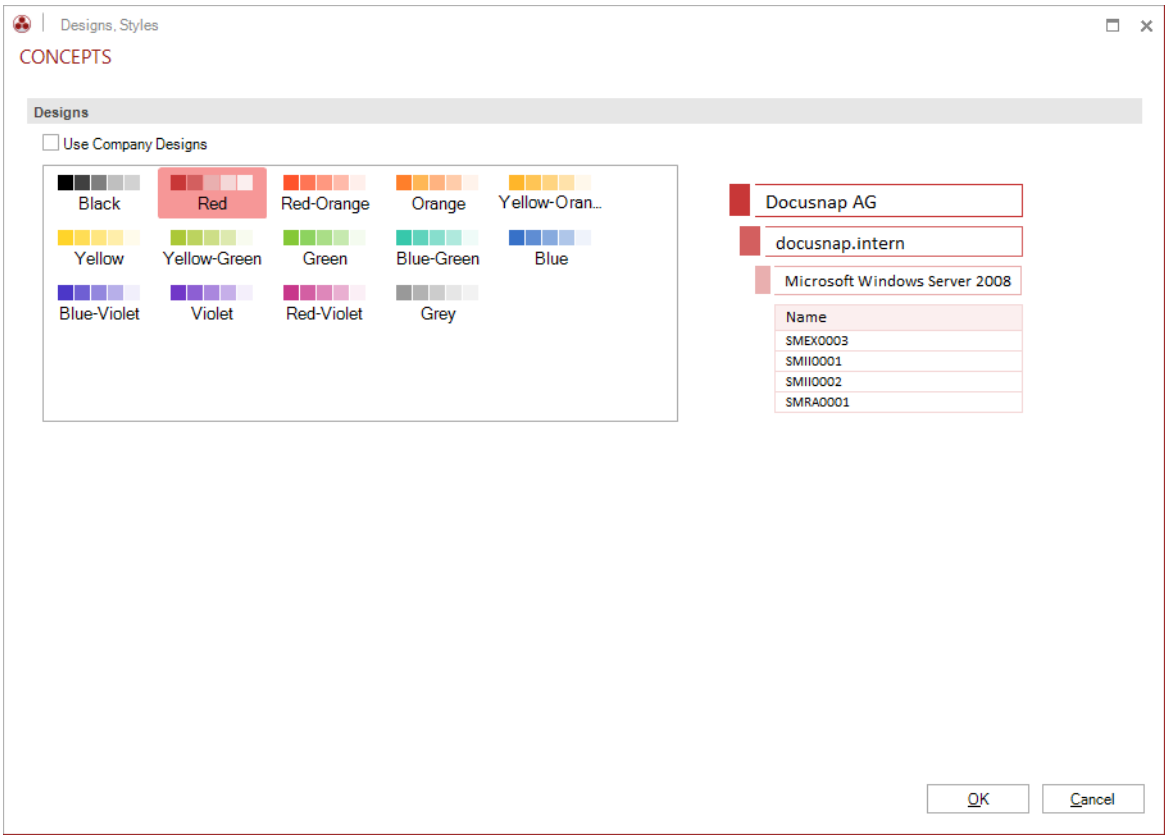
When creating a new document, you can either start with an empty document or select an existing template from the *Template* list. Depending on the language selected for the concept, the available templates are offered for selection.

When creating a document, you must specify a name for it. A click on the *Create* button creates a new document based on the selected template.



9.5 Designs

The design selected in the *Layout (CI)* dialog will be used for the concept. It is possible to choose an individual design for each concept. Clicking the *Design* button opens the *Designs and Styles* dialog. There, you can select a design for the currently open concept.

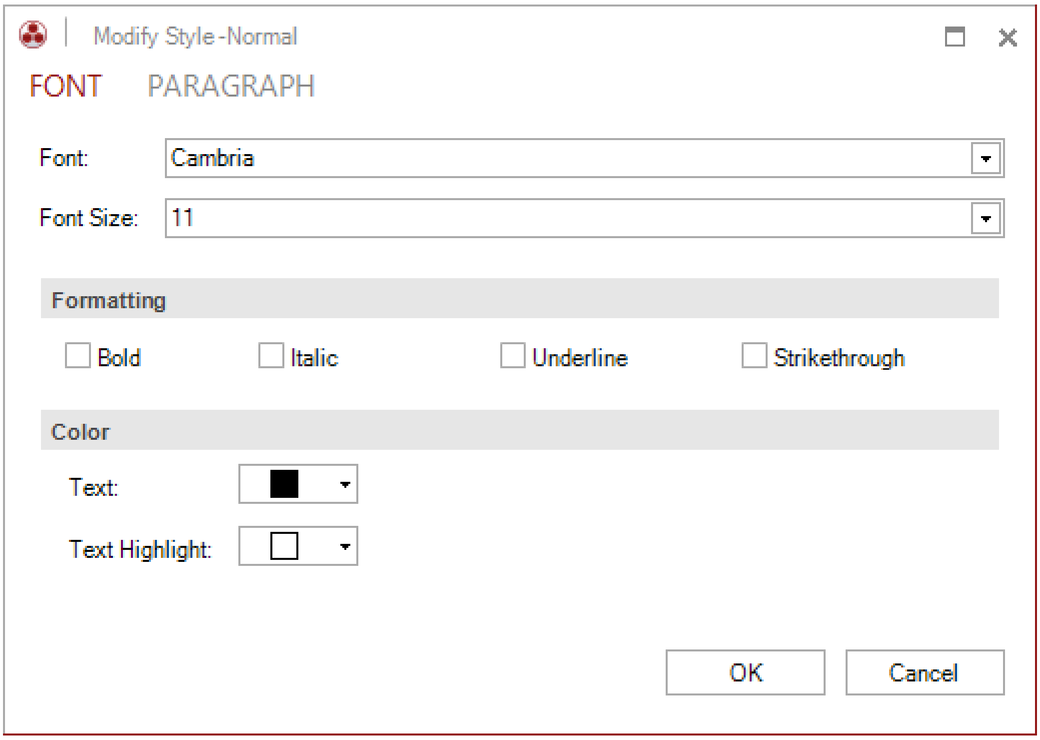


9.6 Styles

Styles are used to achieve centralized formatting of text.

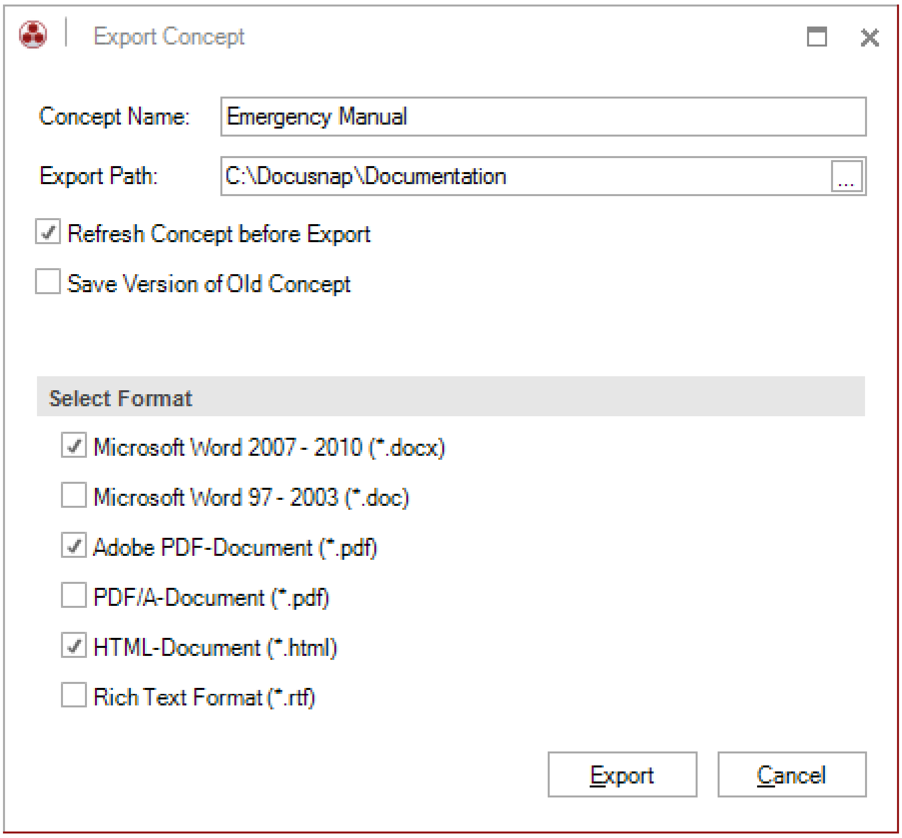
The *Headline 1* through *Headline 4* styles are used for headings. In addition, they are taken into account when creating the Table of contents and for the entries in the *Document Outline* window.

The context menu for each style in the *Styles* group allows you to modify the formatting. Click the *Modify* option to open the *Change Style* dialog. In this dialog, you can adjust the formatting for the selected style.



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 concept to. If the *Refresh Concept before Export* checkbox is checked, all inserted elements such as reports, plans, etc. are refreshed with the current data. If the *Save Version of Old Concept* checkbox is activated, the concept will be saved as a version before the refresh.

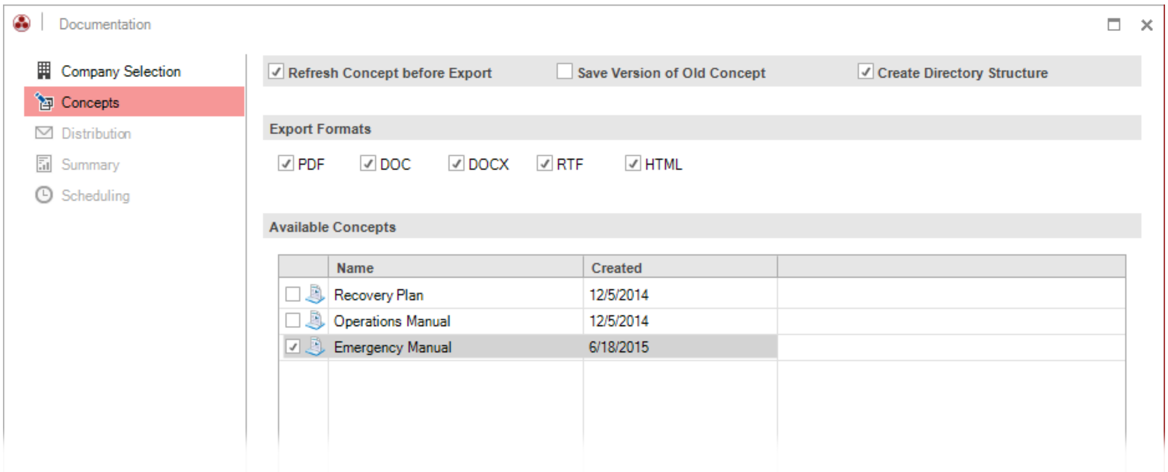


When creating a concept, you can also use the Scheduling feature. Click the *Schedule as Job* button on the *Concepts* ribbon to launch the *Documentation* wizard.

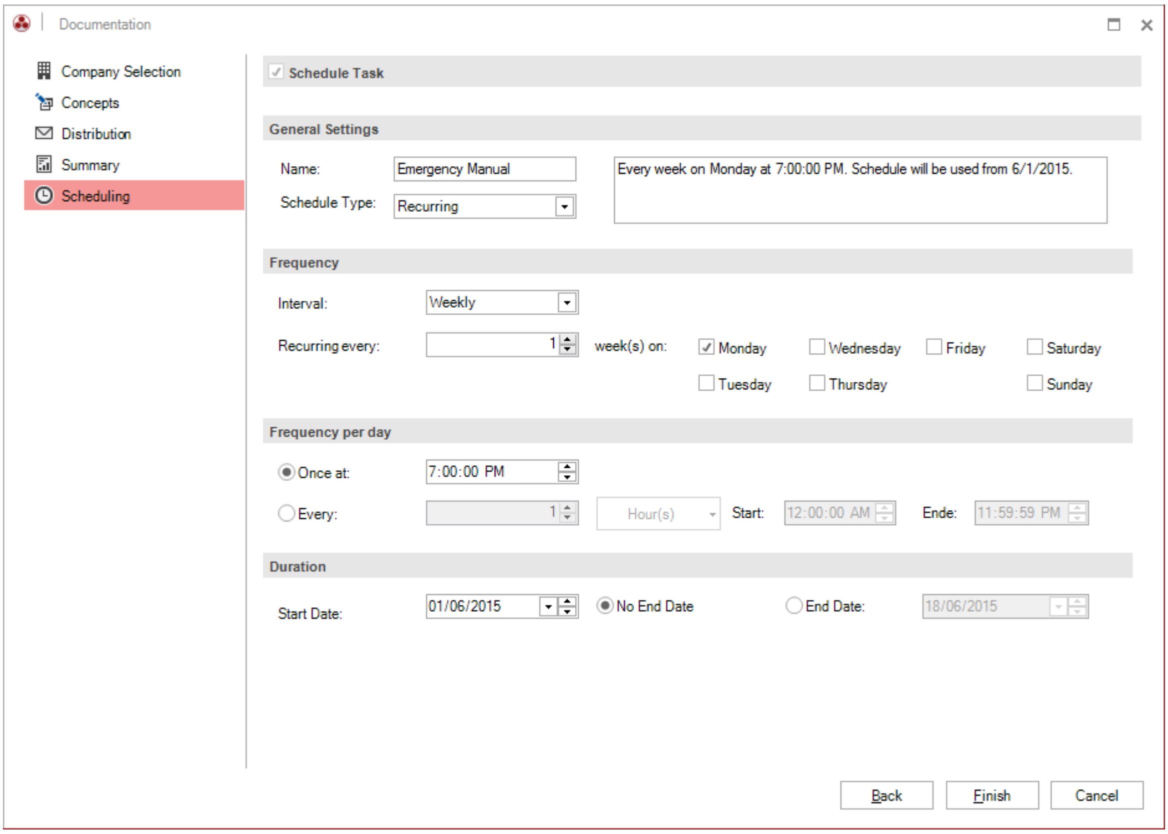
For a description of the basic steps in this wizard, refer to the Basic Steps section of the Documentation chapter. In the *Concepts* step, proceed as follows:

Under *Export Formats*, select the file type to which you want to export the concept. From the *Available Concepts* table, you select the concepts to be exported. The table lists all existing concepts. If the *Refresh Concept before Export* checkbox is checked, all inserted elements such as reports, plans, etc. are refreshed with the current data. If the *Save Version of Old Concept* checkbox is activated, the concept will be saved as a version before the refresh.

Concepts can be organized in folders. If the *Create Directory Structure* checkbox is activated, the folders which contain the concepts will be created during the export.

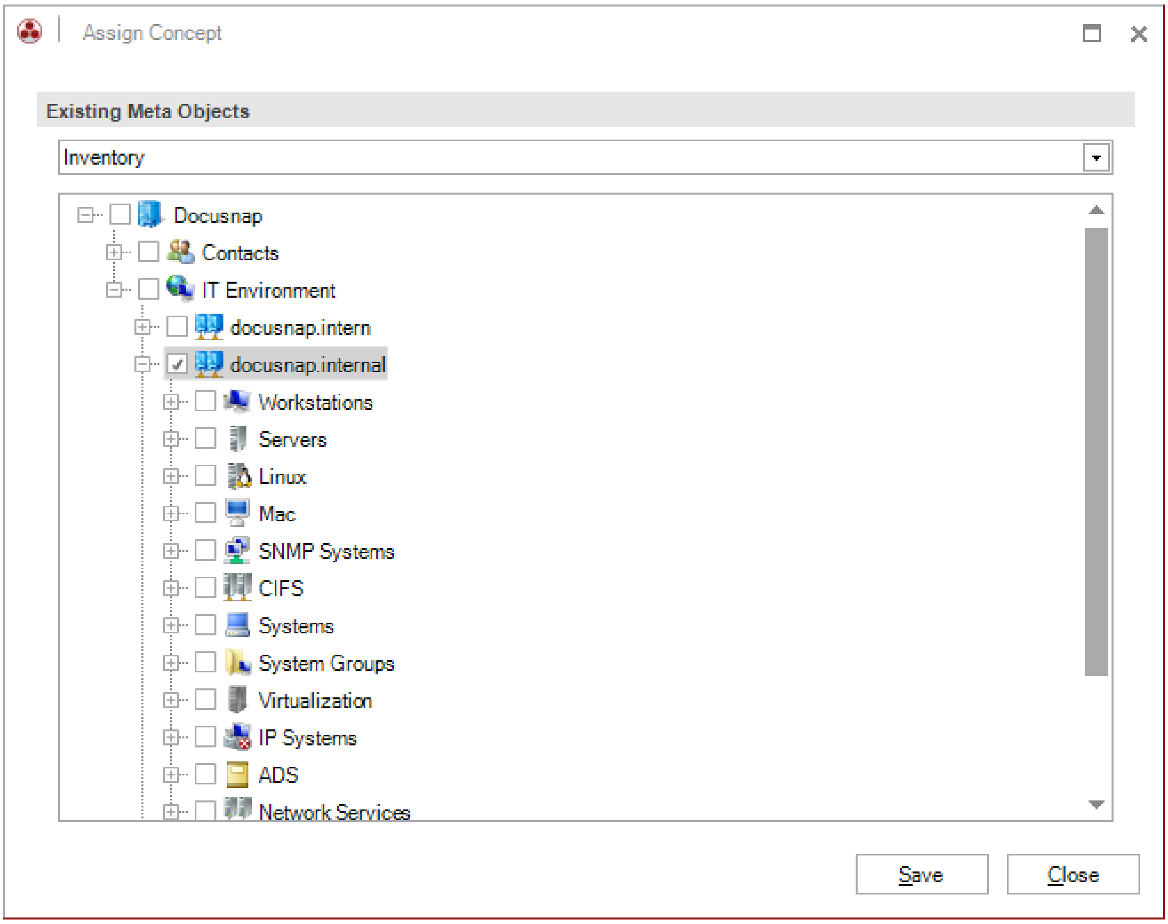


For proper scheduling, specify a name, the schedule type, the interval, the number of recurring executions, the starting date and time. Furthermore, the Docusnap Server must have been configured successfully. For more information on *Automatic Scheduling*, refer to the Scheduling chapter.



9.8 Assignment

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



Use the drop-down list to select the desired Explorer and tick the checkbox for the hierarchical level where you want to insert the concept or the directory. The inserted concept or directory is always located directly below the desired node in the selected Explorer.

Part X

10 IT Assets

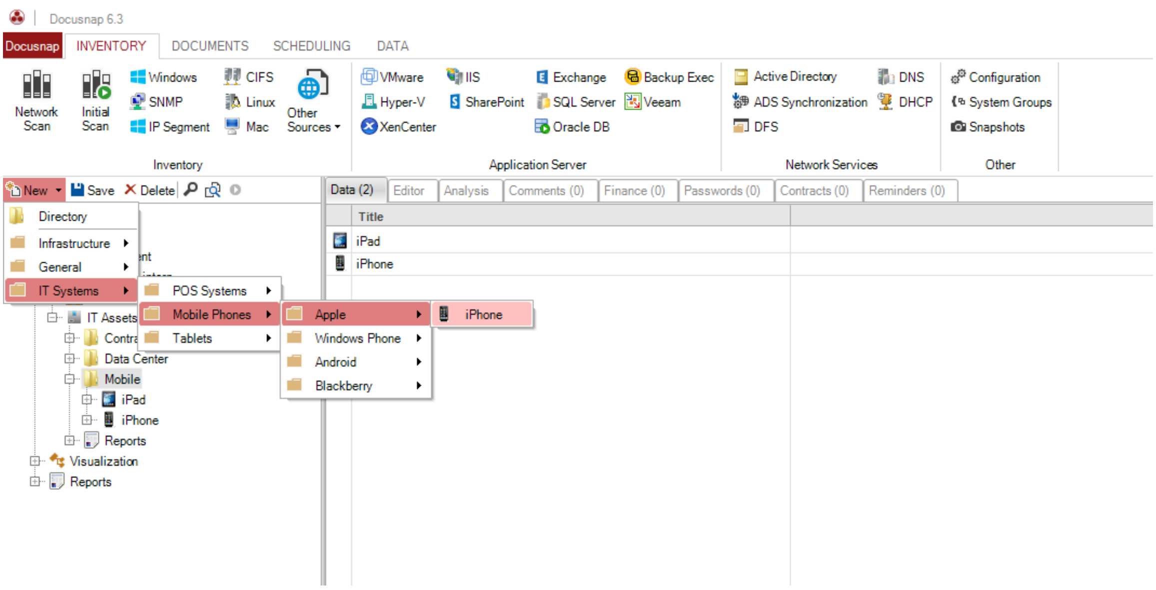
Using the IT Assets functionality, it is possible to inventory systems which cannot be scanned automatically by Docusnap. This can be done manually or by data import.

Docusnap comes with different predefined IT asset types. They can be extended and added to, as required, by creating additional types or classes with minimum effort. Docusnap generates the required data entry screens automatically.

The different IT assets can be embedded into concepts, relations, reports, and maps.

10.1 Create IT Assets

IT assets are created from the *Inventory* tree view. In the first step, create a directory under the *IT Assets* heading. Then, you can create the IT assets under this directory by clicking the *New* button and selecting the desired category. It is possible to clone existing IT assets. When you clone an IT asset, all values except the value defined for the display field will be copied.



In addition to creating IT assets manually, you can import the content of CSV files as IT assets using the Data Import feature.

Under the *IT Assets* heading in the tree structure, you can open the Reports node where two reports are displayed which list the values of the IT assets.

Part XI

11 IT Correlation

IT Correlations are used to visualize and evaluate IT relationships between IT objects and can be accessed by using the drill-down function.

The correlations between the IT objects are defined in Docusnap Management. To identify the connection between two objects, the *IT Correlation* is defined between selected values of these objects. Then the possible *IT Correlations* are displayed, if matching objects are found for the definition.

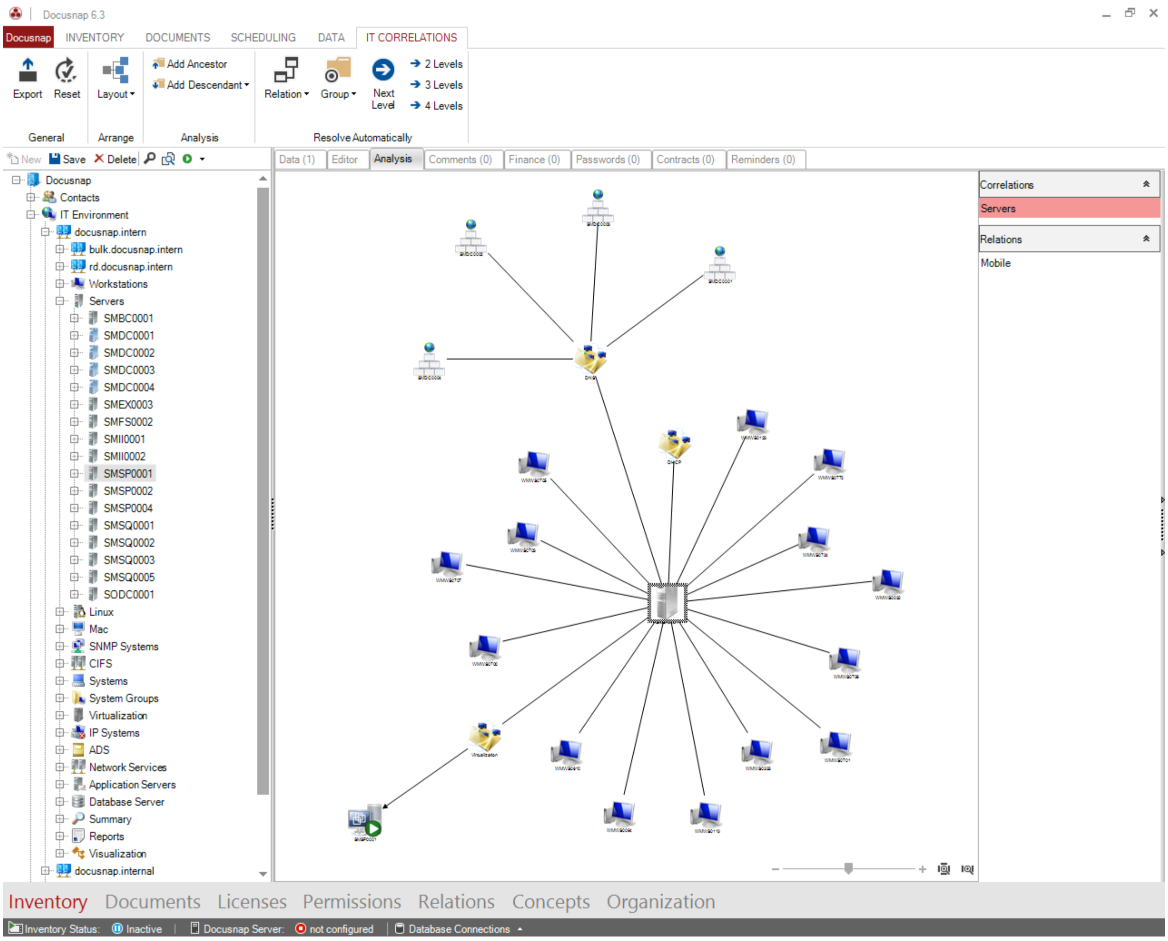
The *IT Correlations* are displayed in Docusnap in the *Analysis* tab if, for the selected object, a correlation is found. From this object, the user can start the evaluation of any or all *IT Correlations*.

For example, a correlation between the inventory workstations and virtual machines in the VMware, or between the Active Directory users and mailboxes on the Exchange server, are defined. Several definitions of IT Correlations are already included in Docusnap.

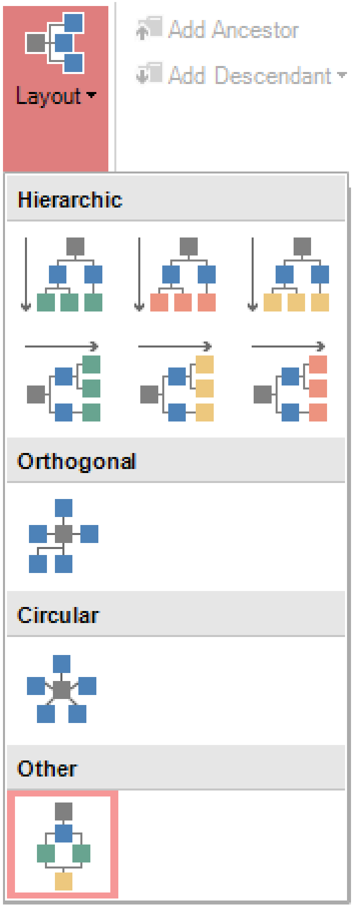
11.1 Using IT Correlation

Every *IT Correlation* has a start object. For this object all the correlating objects are displayed. If for the selected object an *IT Correlation* is defined, the corresponding objects are displayed in the *Analysis* tab. Additional to the directly dependent objects further *IT Correlations* can be shown.

Use the context menu of the object or the *IT Correlations* ribbon to resolve IT Correlations or groups of the object. Additionally, hierarchical ancestors and descendants of the objects can be added. Via the *Level* buttons in the ribbon and the entry *Resolve* context menu you can determine how many levels of IT Correlations should be displayed. This drill-down functionality simplifies the analysis, since you can work through layer by layer.



Depending on the selected algorithm the arrangement of the objects changes accordingly.



Click the *Export* button to export the IT Correlations and the added relations into a file.

11.2 Create IT Correlation

The IT Correlations are configured in Docusnap Management in the *IT Correlations* ribbon. Click the *Relations* button to open the tabs to define IT Correlations.

IT Correlations

You can create new IT Correlations or alter existing ones.

Click the *New* button to create a new IT Correlation. Every IT Correlation has a name and a description in German and English. Every IT Correlation can be defined by what kind of relationship it is. For different types of relationships, different line formats and colors are used.

Every IT Correlation has a start object (Start Type) and a result object (Result Type). These two objects are compared according to the defined filter.

Filter

In the filter, the IT Correlation is defined. In the *Field* column, all the tables and columns of the selected starting object and the hierarchical parent and child objects are displayed. In the *Value* column, all the tables and columns of the selected result object, as well as the hierarchical parent and child objects, are available for selection.

The selected columns in the *Field* column are used for the comparison, e.g. column *ObjectPath* of the table *tADSObject*. In the *Value* column, the column is chosen which identifies the result object to be compared with, for example, the column *ObjectIdentity* of the table *vExchangeMailboxRec.* In this example for each Active Directory user account the corresponding Exchange mailboxes are displayed.

Use the *Operator* column to define the desired relation between startup type and result type.

The comparison of the data does not take domains and companies into consideration. If the filter compares only the name and not the corresponding ID, then objects from other companies or domains could be accidently displayed as IT Correlations. In this case you should include a filter, which compares the DomainID or the AccountID of the relevant tables.

The filter conditions can be grouped and linked with either *And* or *Or*.

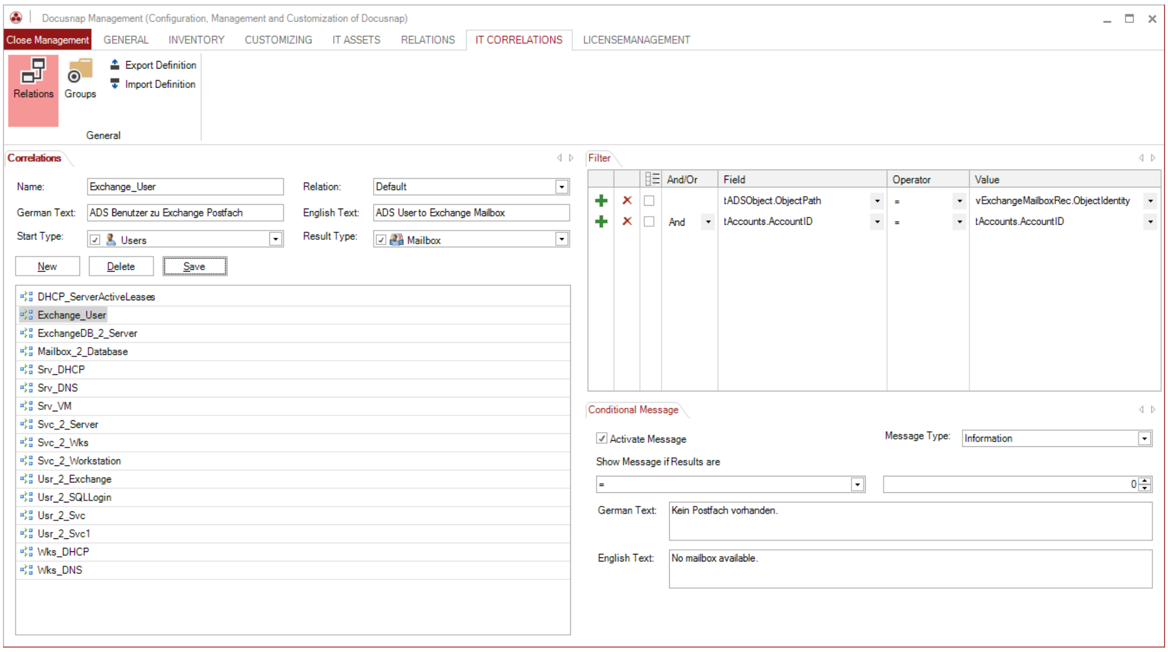
If you want to display workstations and servers as IT correlations for an object two IT Correlations have to be defined. One relation for workstations and one for servers.

The IT dependencies are defined in one direction, from the start to the result object. To display the start object at the result object, an additional IT Correlation must be defined that shows this relation.

Conditional Message

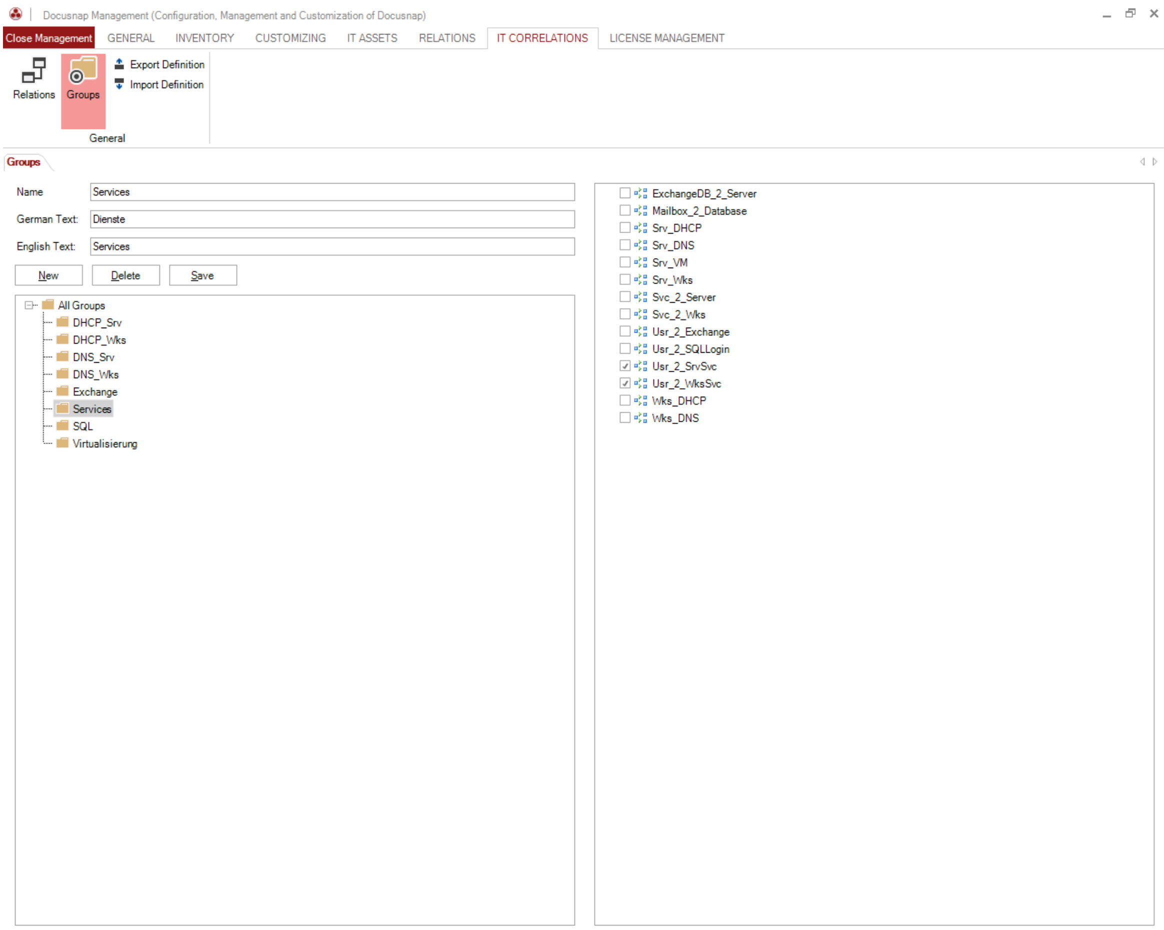
Use conditional messages to define how many result objects should be found. When the condition is true, then the icon and the defined message will be displayed in the diagram of the IT Correlation.

Check the checkbox *Activate Message* to create a message for the IT Correlation. You can define if the number of result objects should be greater than, less than or equal to the specified value to display the message. Select in the field *Message Type* which icon (Info, Warning, Error) should be displayed with the message. For every message you can enter an English or German text.



Group

Groups are used to group multiple IT Correlations. Thereby the diagram in the *Analysis* tab will be less crowded. IT Correlations which have the same start object can be grouped together.



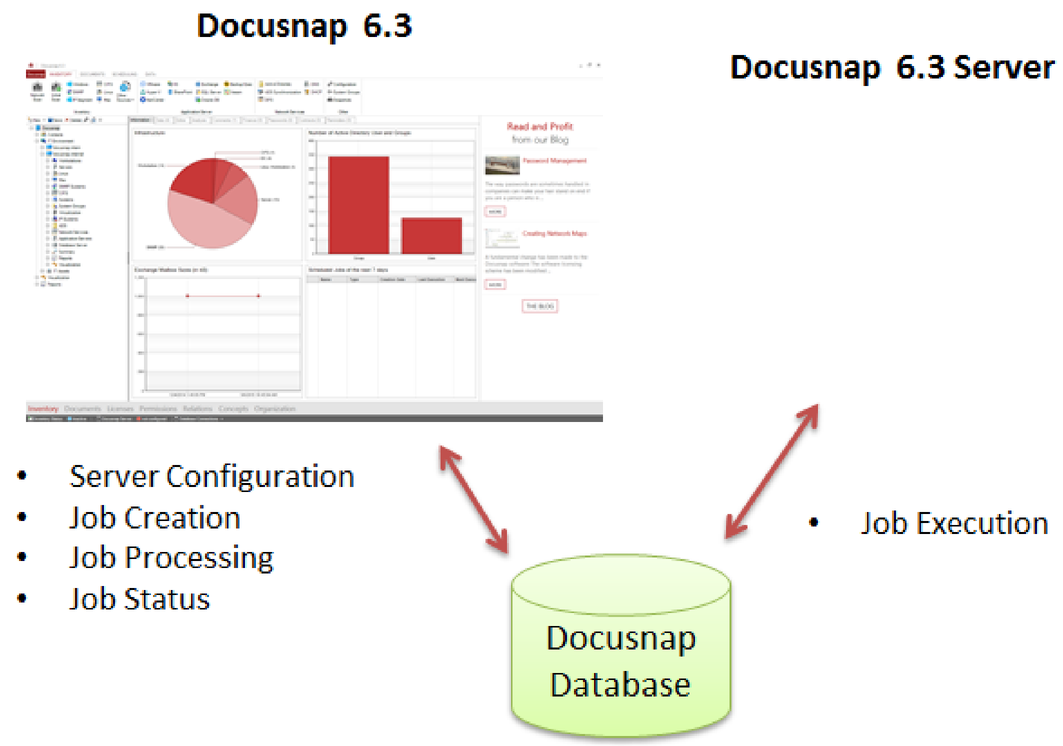
Export / Import Definitions

Click the *Export Definition* button to export the IT Correlations to a file. Firstly, this is to secure the user-defined IT Correlations. Secondly, they can be imported into another Docusnap installation later. This is especially interesting when different IT networks and thus different Docusnap installations are in use. Click the *Import Definition* button to import the IT Correlations from a file. In this way, once defined IT Correlations can easily be reused elsewhere.

Part XII

12 Docusnap Server

The server component of Docusnap allows you to fully automate processes, such as creating an inventory or the associated documentation. This section explains the underlying concept and the configuration of Docusnap Server.



Docusnap

To create, process or monitor jobs, you will use the Docusnap application. The Scheduling step is available in the wizards (see Scheduling). In the *Scheduling* step, you can schedule the automated execution of the current inventory or documentation job for later or repeated execution. The jobs will be saved in the Docusnap database and are immediately available for execution by the Docusnap Server.

The *Job Management* dialog allows you to edit, monitor, delete and, if necessary, start the scheduled jobs (see Job Management).

Docusnap Server

The Docusnap Server is installed as a Windows service and is therefore the central element for the timed execution of scheduled jobs. The Docusnap Server can be configured using the Configuration wizard in Docusnap. The Docusnap server can also be configured during the first start Docusnap. The configuration wizard can also be launched from the *Configuration* button in the *Scheduling* ribbon during operation.

As already described previously, the jobs are configured, scheduled and saved in the Docusnap database. The jobs will be loaded by the Docusnap Server upon startup or during normal operation and executed as scheduled.

By default, the Docusnap Server service will be installed using the local system account. At this point, make sure that the specified account has sufficient access rights to the SQL Server, since otherwise, the Docusnap Server service cannot be started.

The Docusnap Server can only be used, if a SQL Server database is selected. The use of the local database (Microsoft Server Express LocalDB) is not supported.

12.1 Configuration

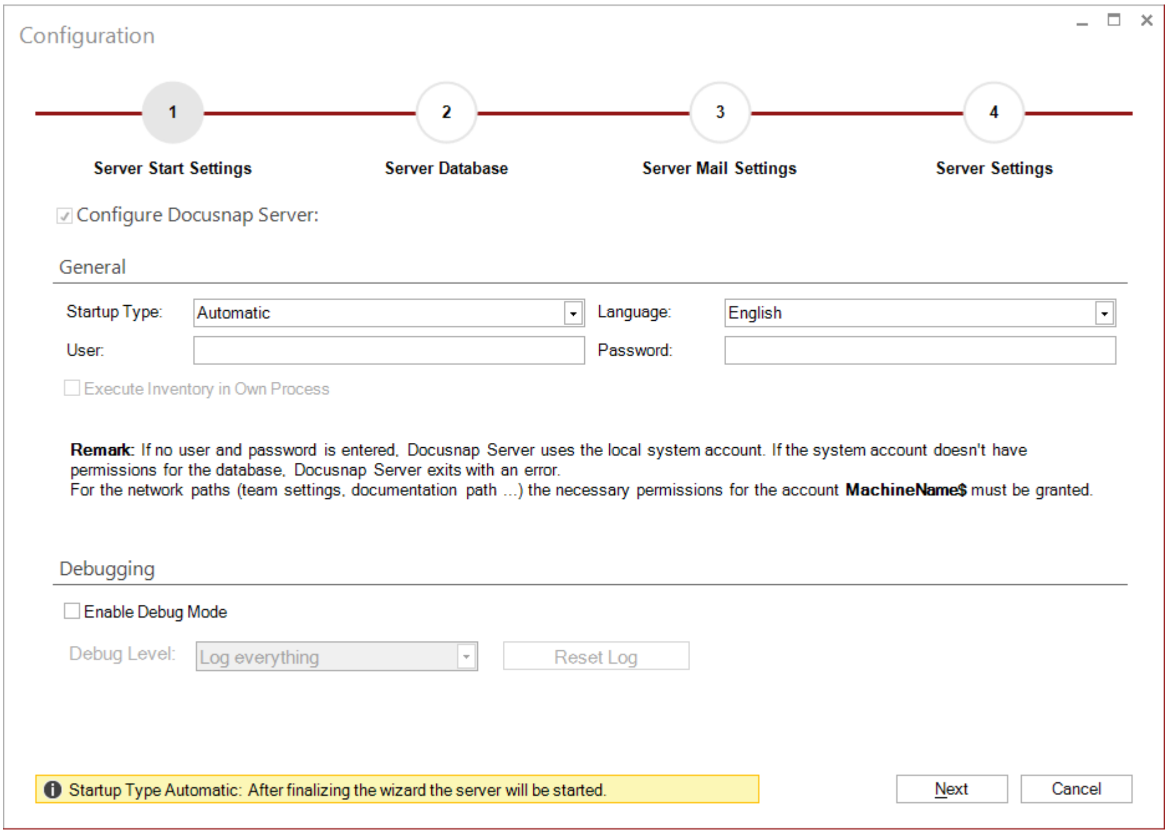
Click the *Configuration* button in the *Docusnap Server* group of the *Scheduling* ribbon to open the configuration dialog for the Docusnap Server.

Server Start Settings

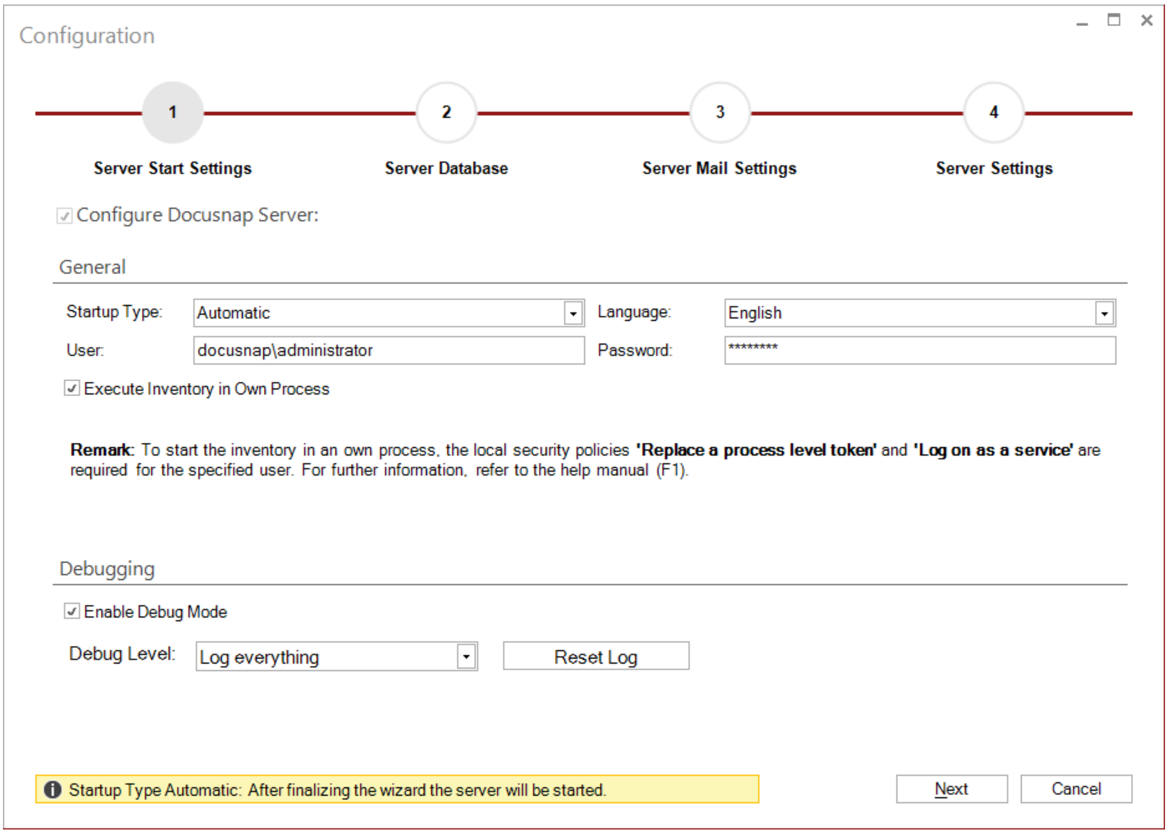
Select the startup type *Manual* or *Automatic* for the service in the *Server Start Settings* step.

In addition, you can turn on the debug mode for the Docusnap Server here.

By default the service runs under the system local account. To ensure the connection to the database, it is recommended to provide a SQL Server Authentication in the wizard step *Server Database*.



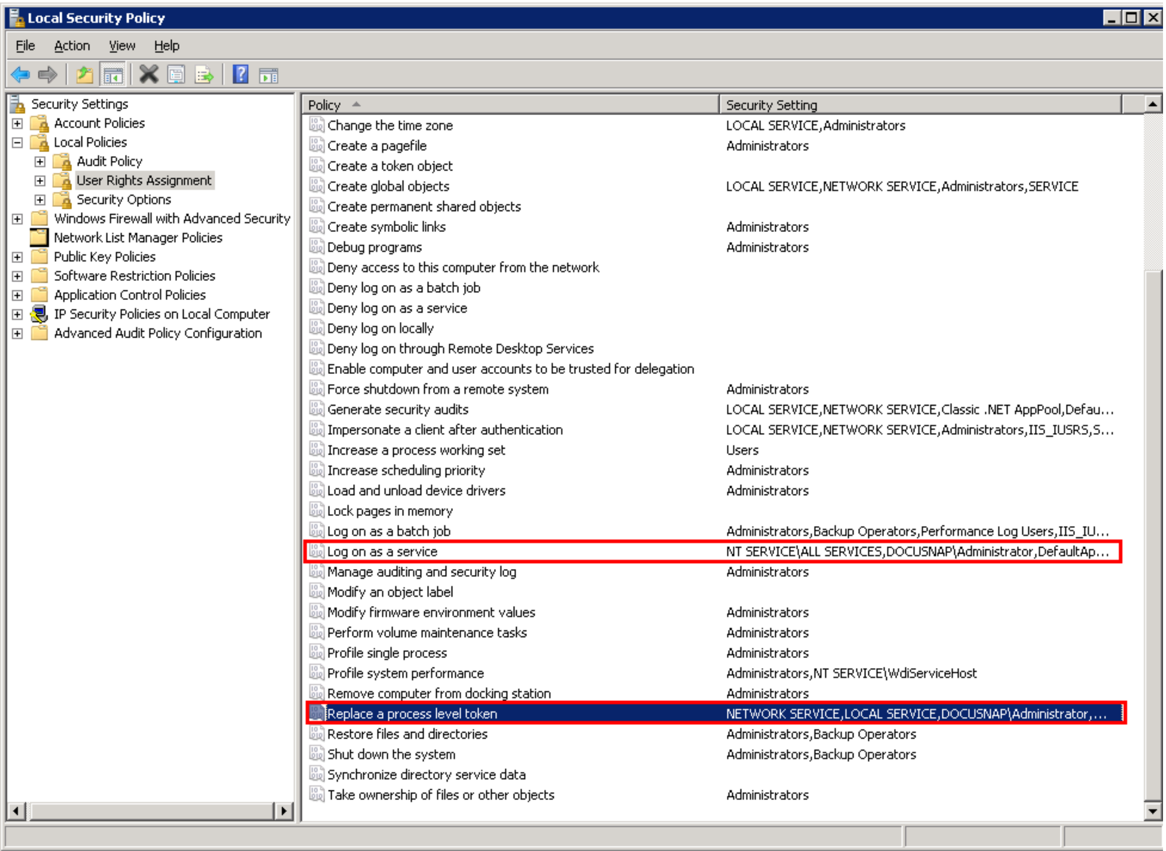
It is also possible to specify a user, who is used for the execution of the service.



In order to execute a correct inventory, the local security policies *Replace a process level token* and *Log on as service* must be set for the specified user, if a specified user is defined.

Check the checkbox *Execute Inventory in Own Process* to confirm that the security policy has been set.

If a user is entered, but the local security policy has not been set or the checkbox has not been checked, than several inventory processes might not be executed correctly.



Server Database

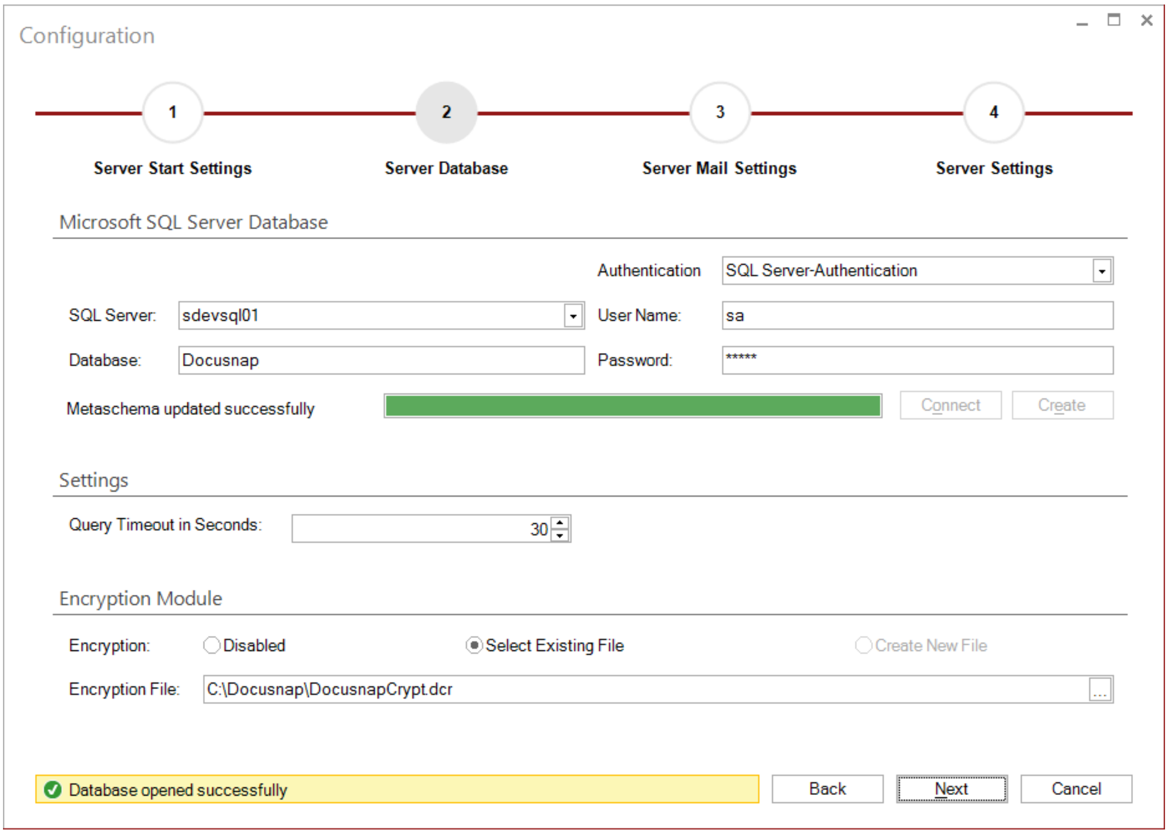
The Docusnap database is the key element for performing the jobs. It holds the jobs to be processed by the Docusnap Server.

Only one Docusnap server is defined for each database. If an active Docusnap server of another system is already registered in the database, the Docusnap server will not be started at the end of the wizard. In this case only the defined settings are saved.

By default, the Docusnap Server service will be installed using the local system account. At this point, make sure that the specified account has sufficient access rights to the SQL Server, since otherwise, the Docusnap Server service cannot be started.

By default, the timeout for database queries is 30 seconds. For large databases, however, it may happen that database queries take longer. To execute these queries nonetheless, the query timeout can be increased.

The change of the Timeout will be stored in a configuration file located on the computer where Docusnap is running and will be used for every connection to a database.



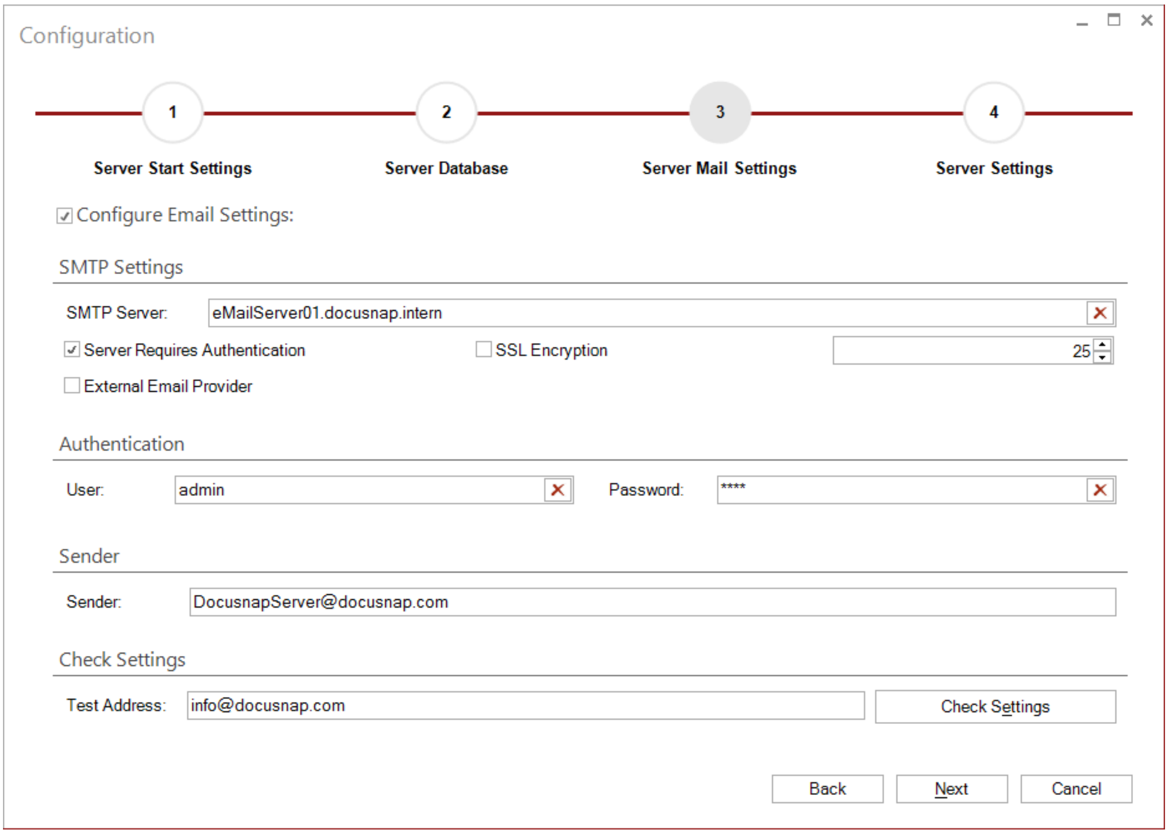
Server Mail Settings

Docusnap provides notifications for particular occasions, e.g. when a contract has expired. These notifications are sent out by e-mail.

In the SMTP Settings group, you can enter the SMTP server data and select additional options for authentication and SSL encryption. If the SMTP server requires authentication, the *User* and *Password* text fields will be enabled so that you can enter the required information. With an *External Email Provider* no separate domain information in the credentials is used (not required for user authentication from external providers).

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.



Server Settings

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

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

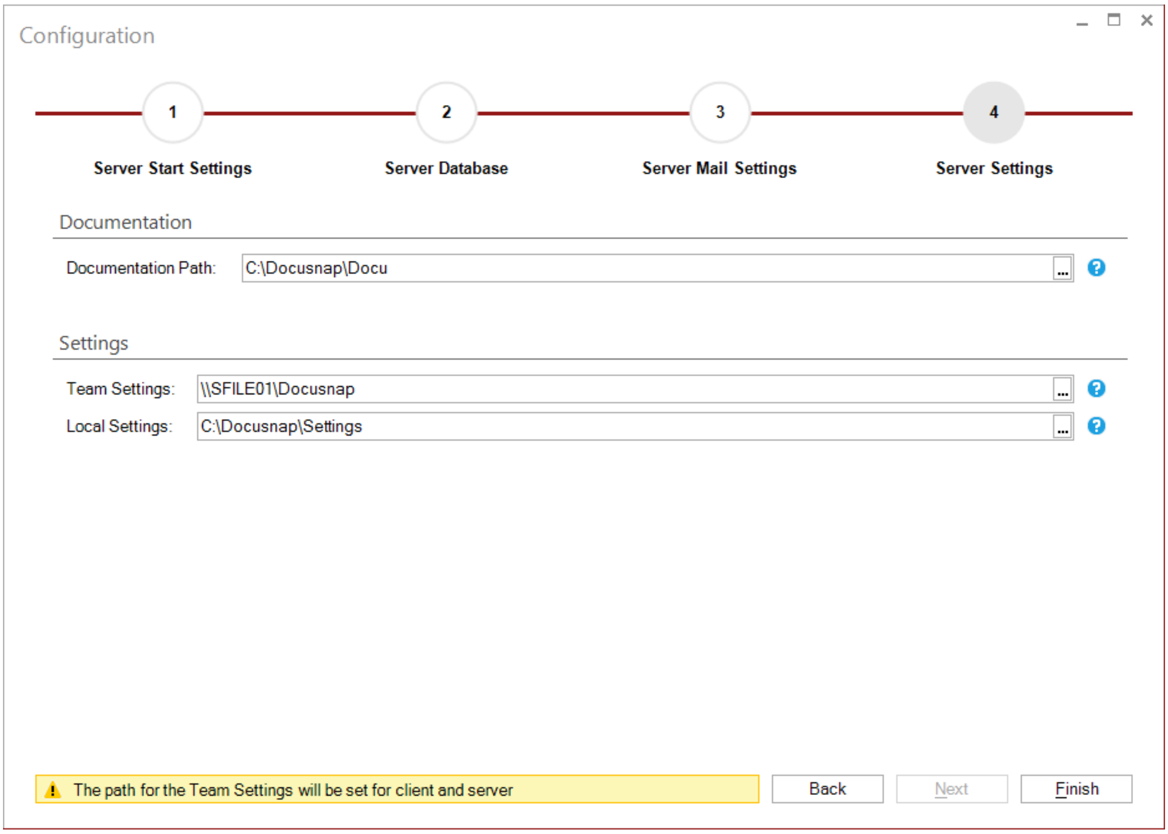
The files and templates used by Docusnap may either be stored on the local hard disk, on a server or on another computer in the network. To obtain consistent results, the same team settings path is used for the Docusnap client and Docusnap Server. If the path is changed in the options dialog, it will be changed for the

Docusnap Server and vice versa, when both are connected to the same database. If no path was selected for the *Team Settings* or if that path no longer exists, the path specified for the *Local Settings* will be used.

The IT concepts 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.



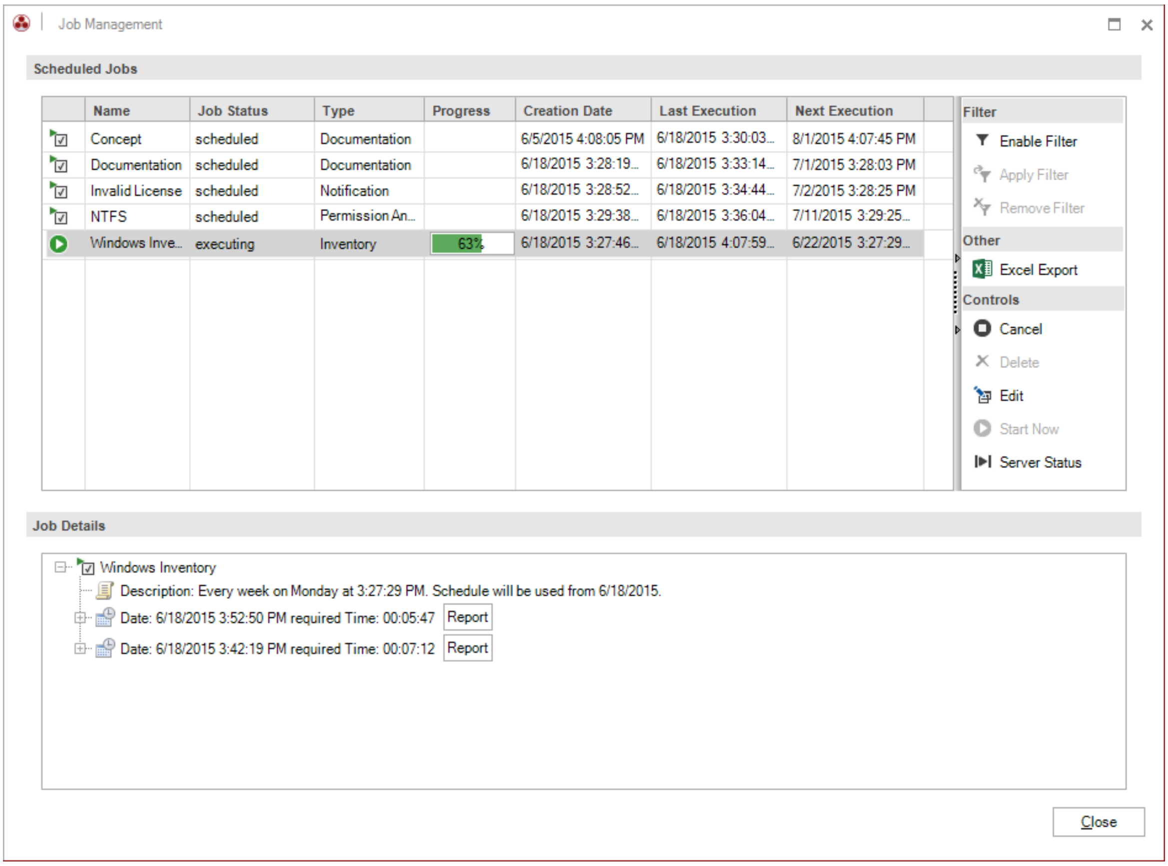
Click the *Finish* button to apply the settings and start the Docusnap Server.

12.2 Job Management

The Job Management feature in Docusnap provides advanced management options for your jobs. Click the *Jobs* button in the *Scheduling* 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*.

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 Cancel button. To delete a job from the database, select it and click the Delete button. Clicking the Start Now button immediately starts the selected job, provided that no other job is currently in progress. When you click the Edit 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 *Server Status* button.

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.

12.3 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, Oracle, Backup Exec, DFS and Veeam.

XML Import

By executing *DocusnapScript.exe* you can save the information from a particular system in an XML file. The location for these files can be defined by means of various parameters in the *DocusnapScript.exe* file. For example, you can use the logon script to define the share to be used for saving these files when DocusnapScript.exe is executed. These files can be automatically retrieved and imported through the automation of this process. For details on this topic, refer to the Importing Scripts section.

Permission Analysis

You can schedule the inventory of NTFS permissions and the creation of the associated documentation for a particular date and time.

Documentation

Datasheets, overviews and maps can be created automatically in the documentation process.

IT Concepts

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

Notifications

The Notification feature sends an e-mail, for example, when a license or contract expires.

Reports

It is possible to schedule the creation of reports and have them created at any desired time. The reports will be exported in the selected format.

Docusnap Connect

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

12.4 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 Configuration wizard.

Enabling debug mode results in a multitude of debug information being recorded in the database. Make sure to enable this mode only in case of need, as it dramatically reduces the performance of Docusnap due to the analysis executed at runtime.

Part XIII

13 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 or MySQL database or save it as an XML, CSV or Excel file.

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.

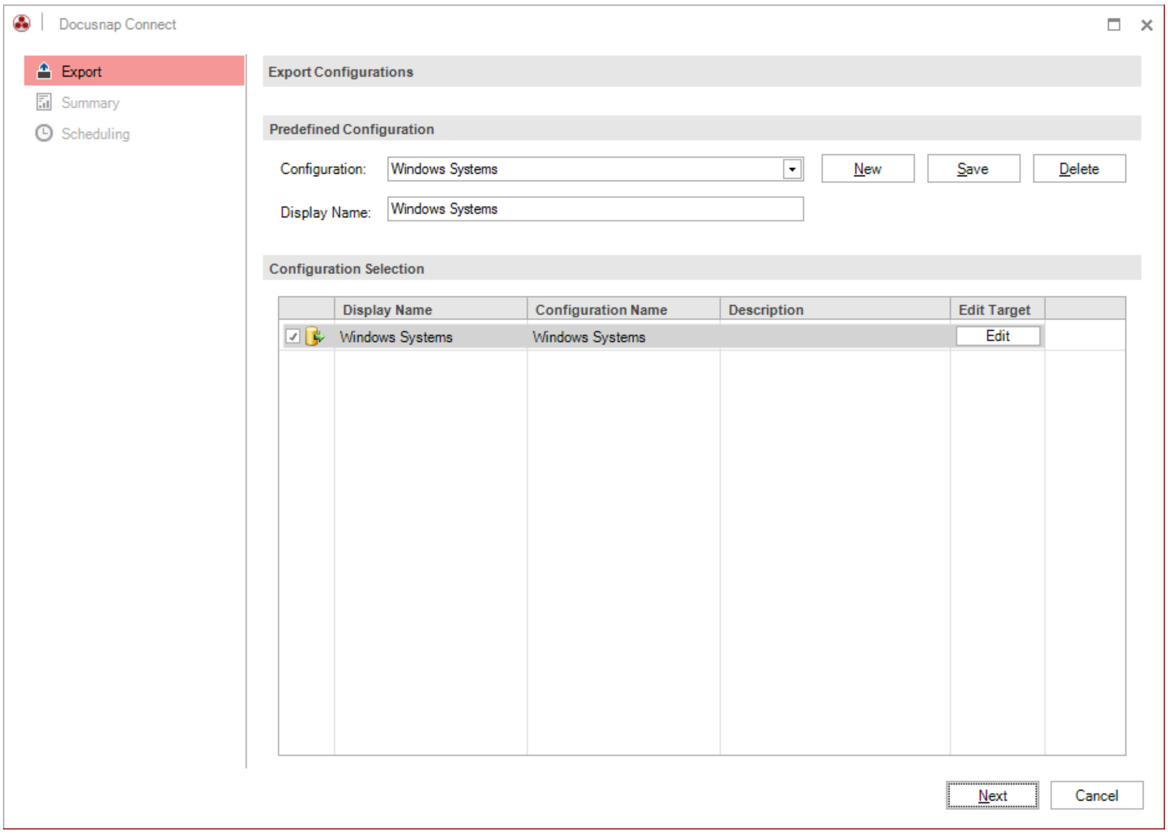
13.1 Schedule Package

Once you configured the packages in Docusnap Management, you can export the corresponding data.

Click the *Schedule Package* button in the *Scheduling* ribbon to launch the *Docusnap Connect* wizard. In the first step, select the package to be exported. To do so, click the *New* button. Then, save your selection and configure the target.

You can select as many packages for export as desired. In addition, it is possible to export them to different targets.

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

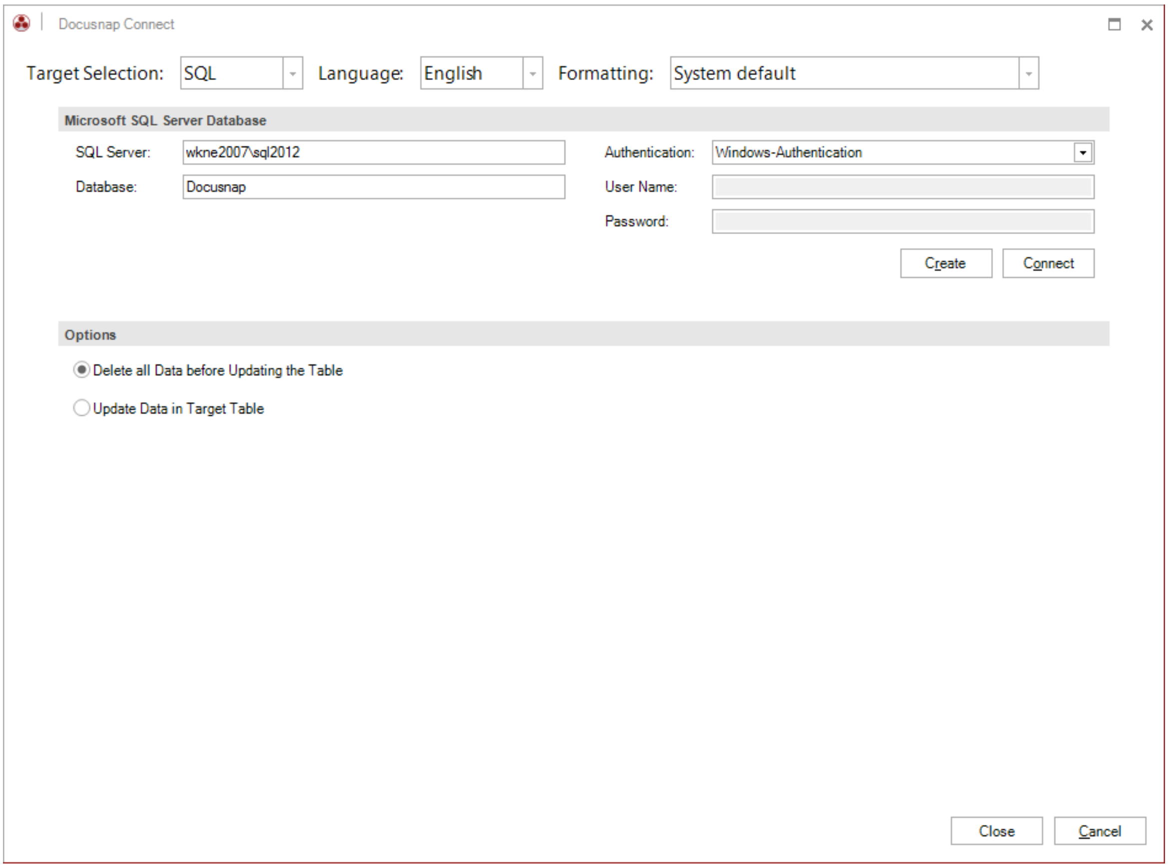


Configuring Docusnap Connect Targets

You can export the data to an SQL or MySQL database or save it as an XML, CSV or Excel file from within Docusnap. First, select the target in the *Target Selection* field. In the *Language* field, select the language in which you want the references to be written.

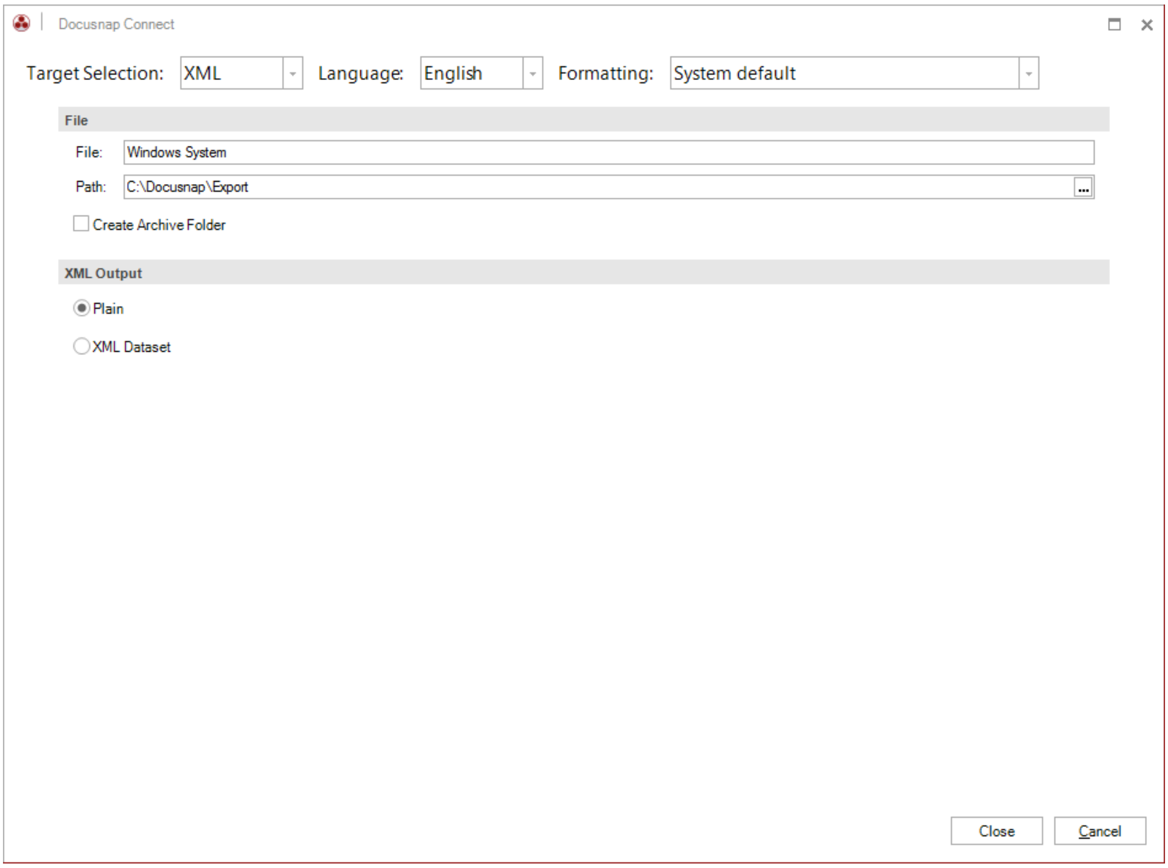
SQL

Before you can export the data to an SQL database, the connection to the SQL server and the desired database must be checked. If the specified database does not exist on the SQL server, it may be created. When exporting data to an SQL database, you can specify whether previously exported data should be updated or if you want to delete all data and populate the tables with the new export data.



XML

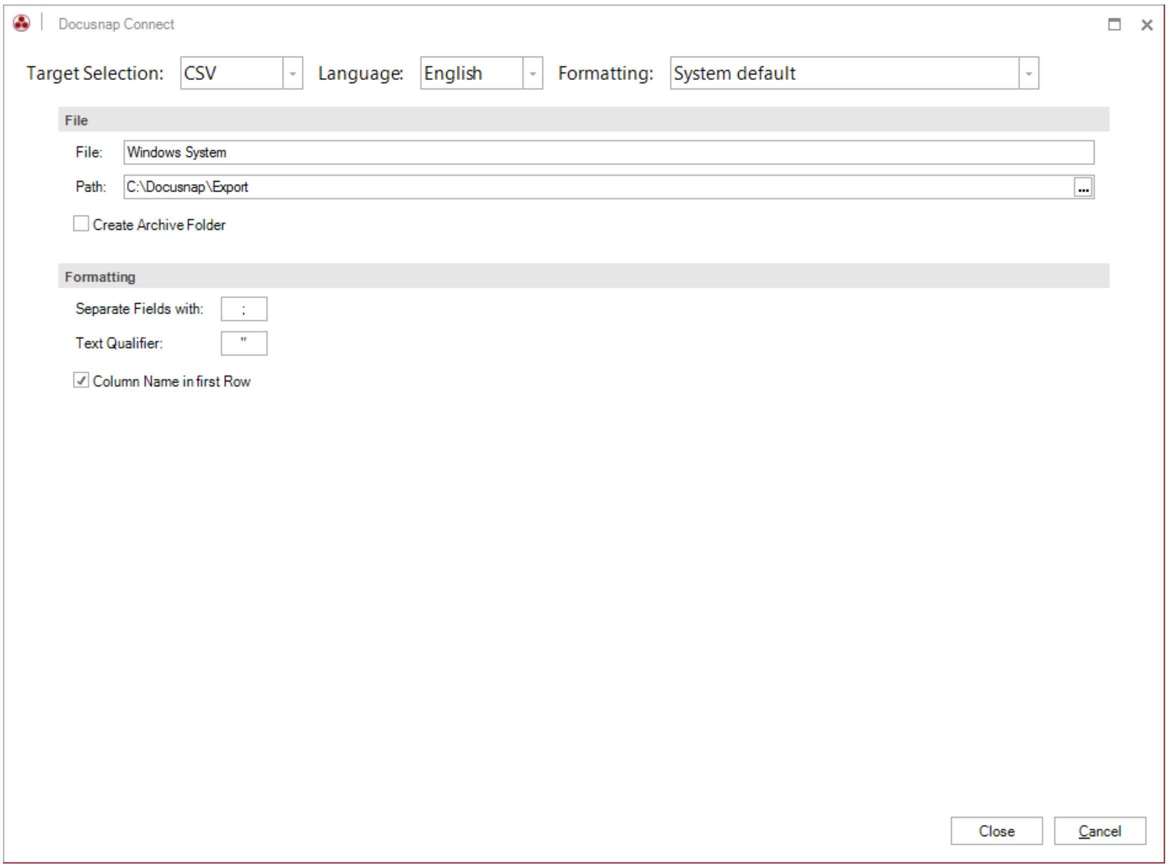
When exporting data to an XLM file, you must specify its name and path. By enabling the *Create Archive Folder* checkbox, you can move older files to an archive folder. For the output, you can select a plain format or XML Dataset.



CSV

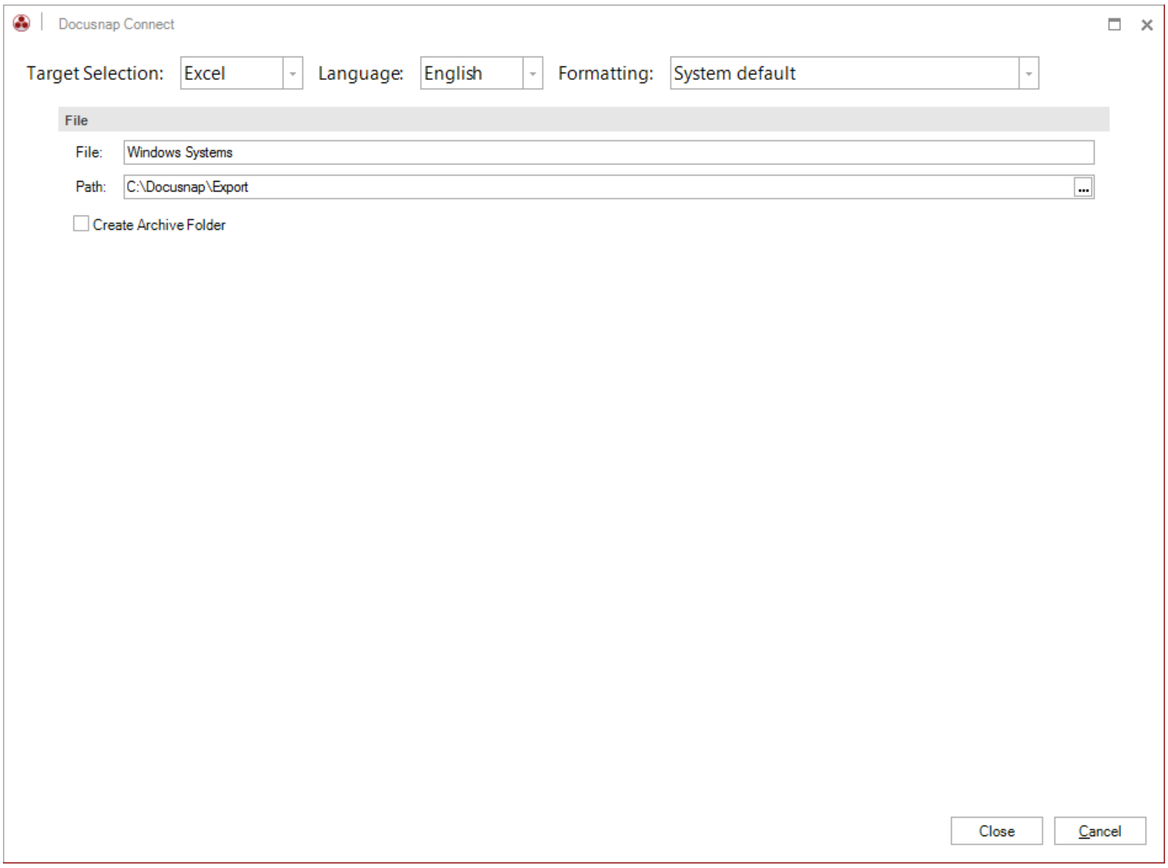
When exporting data to a CSV file, you must specify its name and path. In the *Separate Fields with* field, you can specify the field separator. The character you specify in the *Text Qualifier* field defines all text between two occurrences of this character as a unit. By ticking the *Column Name in 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.



Excel

When exporting data to an Excel file, you must specify its name and path. By enabling the *Create Archive Folder* checkbox, you can move older files to an archive folder. If during configuration you decide to distribute the data output to multiple tables, a separate worksheet is created in the Excel file for each table.



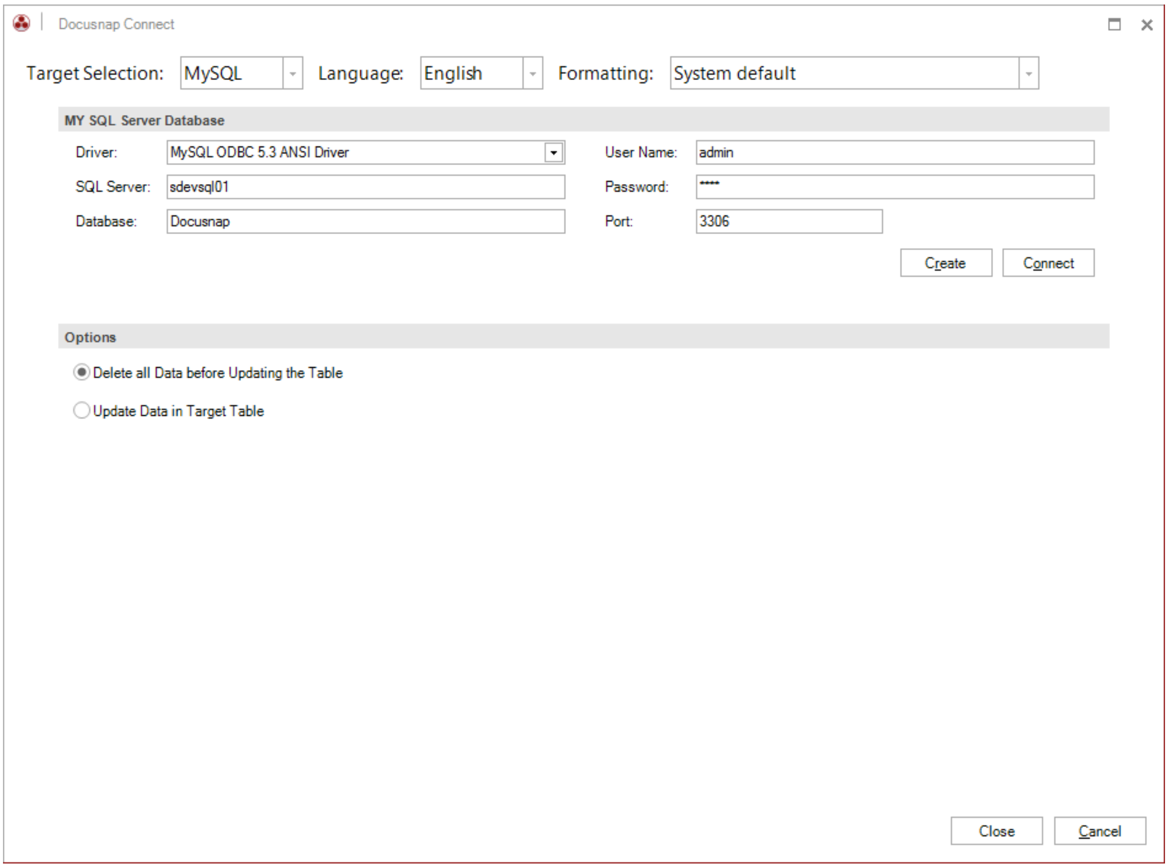
MySQL

Before you can export the data to a MySQL database, the connection to the MySQL server and the desired database must be checked. If the specified database does not exist on the MySQL server, you create it in this dialog. When exporting data to a MySQL database, you can specify if previously exported data should be updated or if you want to delete all data and populate the tables with the new export data.

The Driver drop-down list lists all installed MySQL ODBC drivers.

The MySQL ODBC driver is not supplied with Docusnap and must be installed manually. You can download the driver from the MySQL website. Follow the instructions and make sure you download and install the correct version.

Docusnap requires the 64-bit version of the MySQL ODBC driver for a 64-bit operating system and the 32-bit version of the MySQL ODBC driver for a 32-bit operating system. There are some known problems with the 3.51 version of the 64-Bit ODBC Driver. Please install version 5.3 or higher.



Summary

The Summary page shows all packages to be exported.

Scheduling

By using the Scheduling feature, you can specify that the automatic start of the data export starts at a later time.

In order to use this feature, the Docusnap Server component must be configured for this database on a system in the network.

Status

After the export has started, the dialog will display its progress. To abort the export process, click the *Cancel* button. All packages flagged as *Completed* have already been exported. They will not be deleted.

Final Report

The final report shows which packages could be exported successfully. To exit the wizard, click the *Close* button.

Part XIV

14 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.

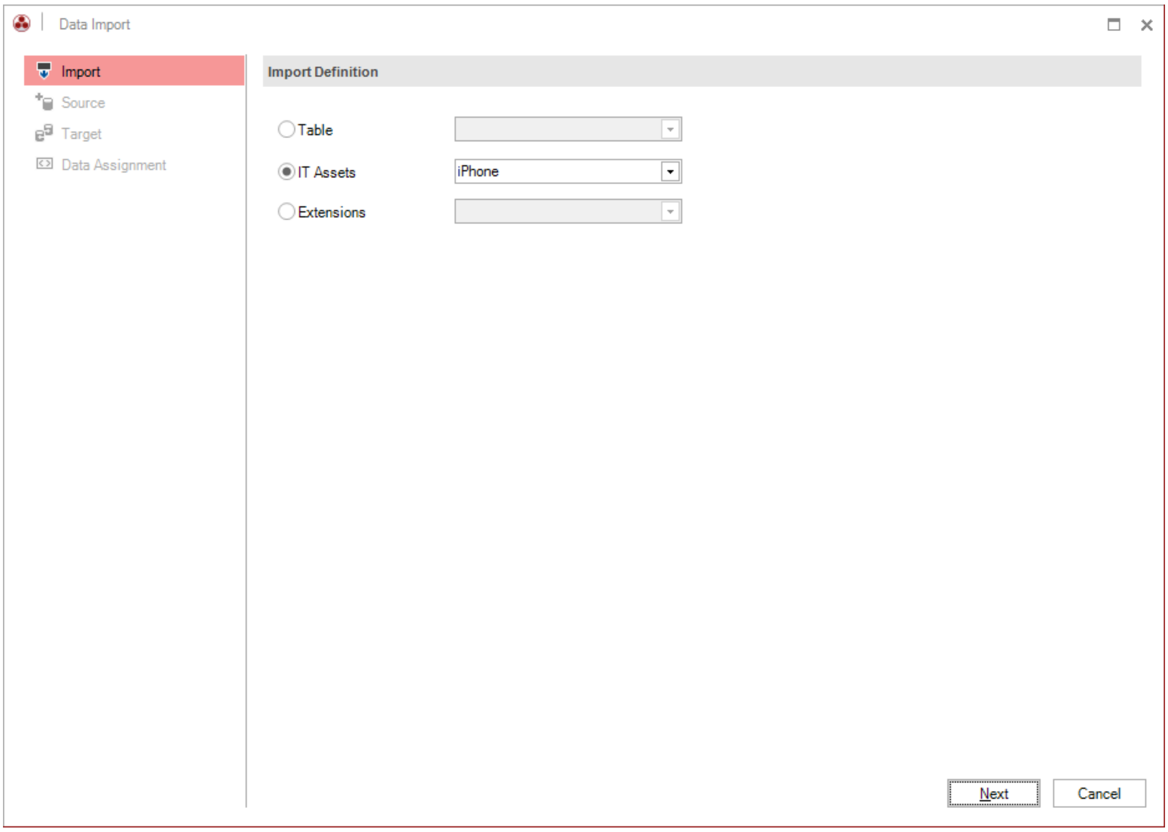
This data can be imported to IT assets, extensions, and any desired tables.

14.1 Wizard

Click the *Data Import (csv)* button in the *Data* ribbon to open the data import wizard.

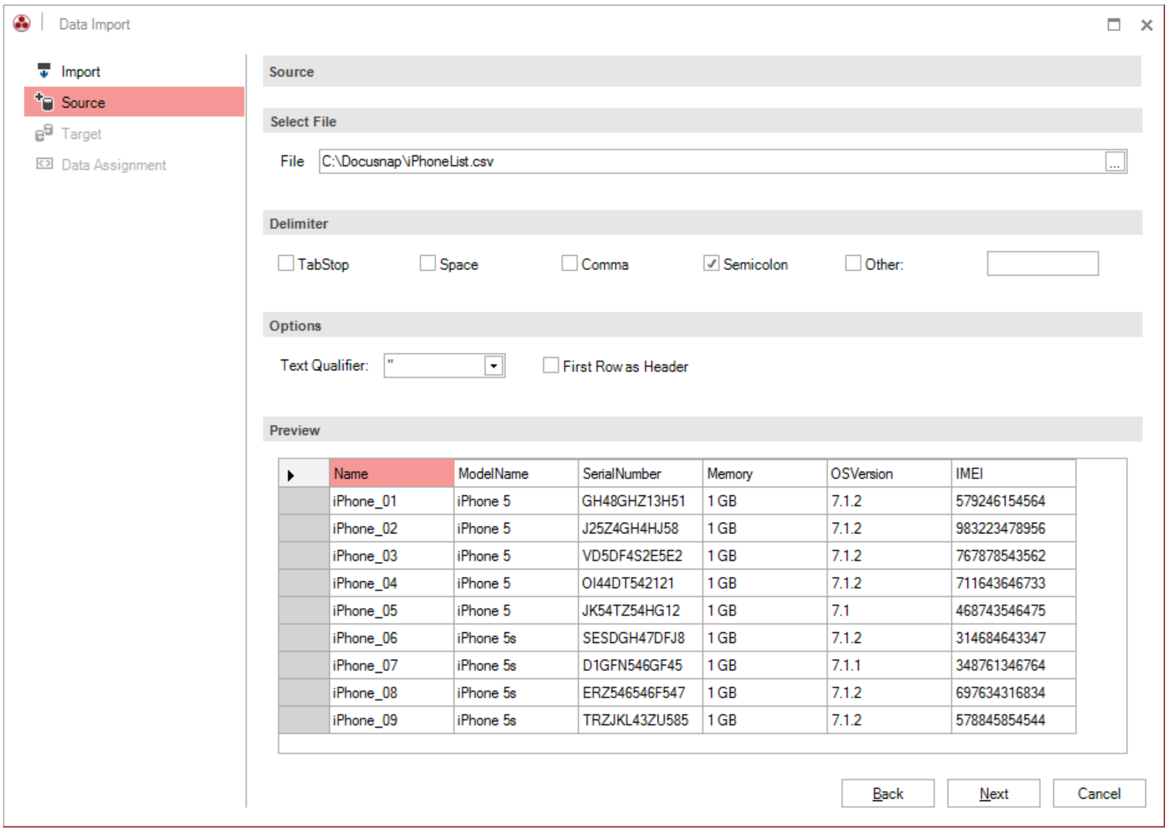
Import

In the first step, you can specify where to import the data. The following options are available: IT Assets, Extensions, and Table. Under IT Assets, all existing classes can be selected as the target. For the import to tables, you can select any available real tables. Under Extensions, you can select the Comments, Finances, Reminders, Contracts, or Passwords category. The import of passwords is only possible if an encryption file has been selected.



Source

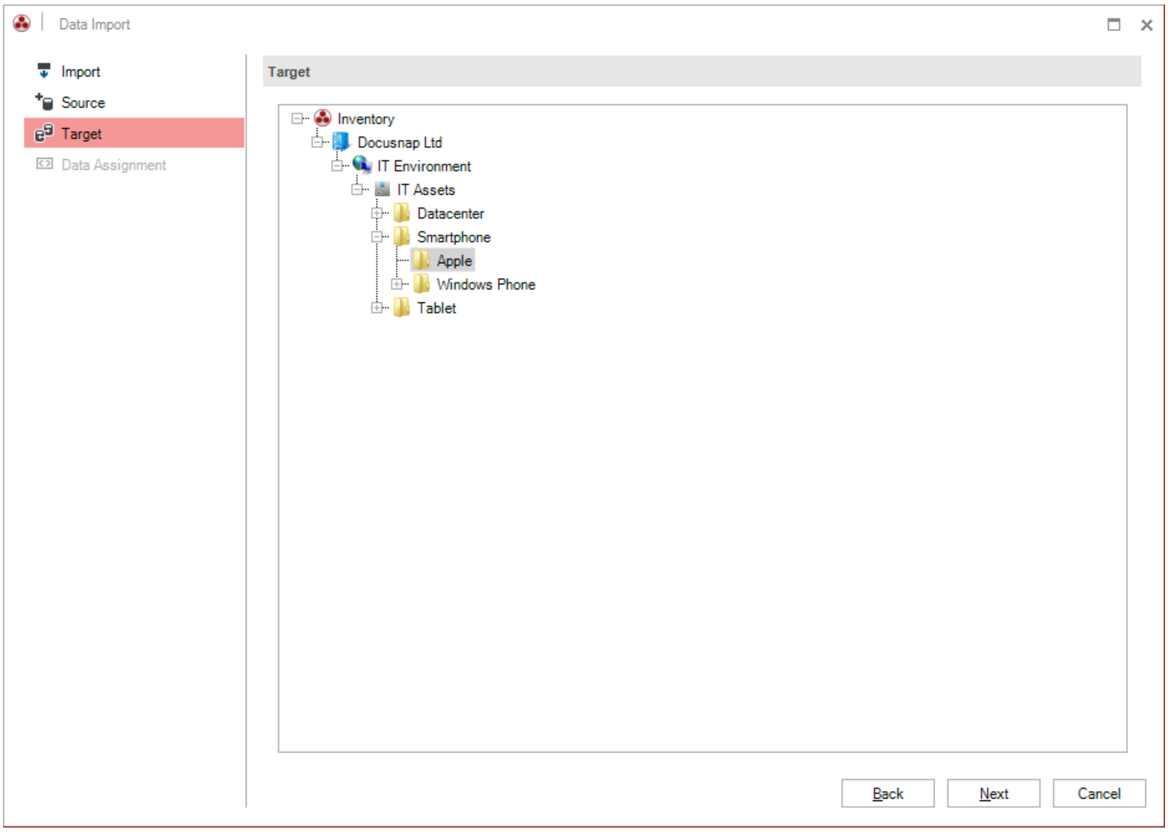
Once you have selected the import type, specify the import file in the next step. The preview shows the first ten entries of the selected file. In the *Delimiter* group, you can specify the character used as separator for the data. The character specified in the *Text Qualifier* field defines all text between two occurrences of this character as a unit. Tick the *First Row as Header* checkbox to specify that the first row contains headers that should not be treated as data.



Target

The window for the *Target* step is only shown when you import IT assets or extensions.

- IT Assets: In the case of IT assets, select the folder for the IT assets to be imported.
- Extensions: Extensions are assigned to existing static objects. When importing extensions, specify the object to which the data should be associated. All static objects are available for selection.



Data Assignment

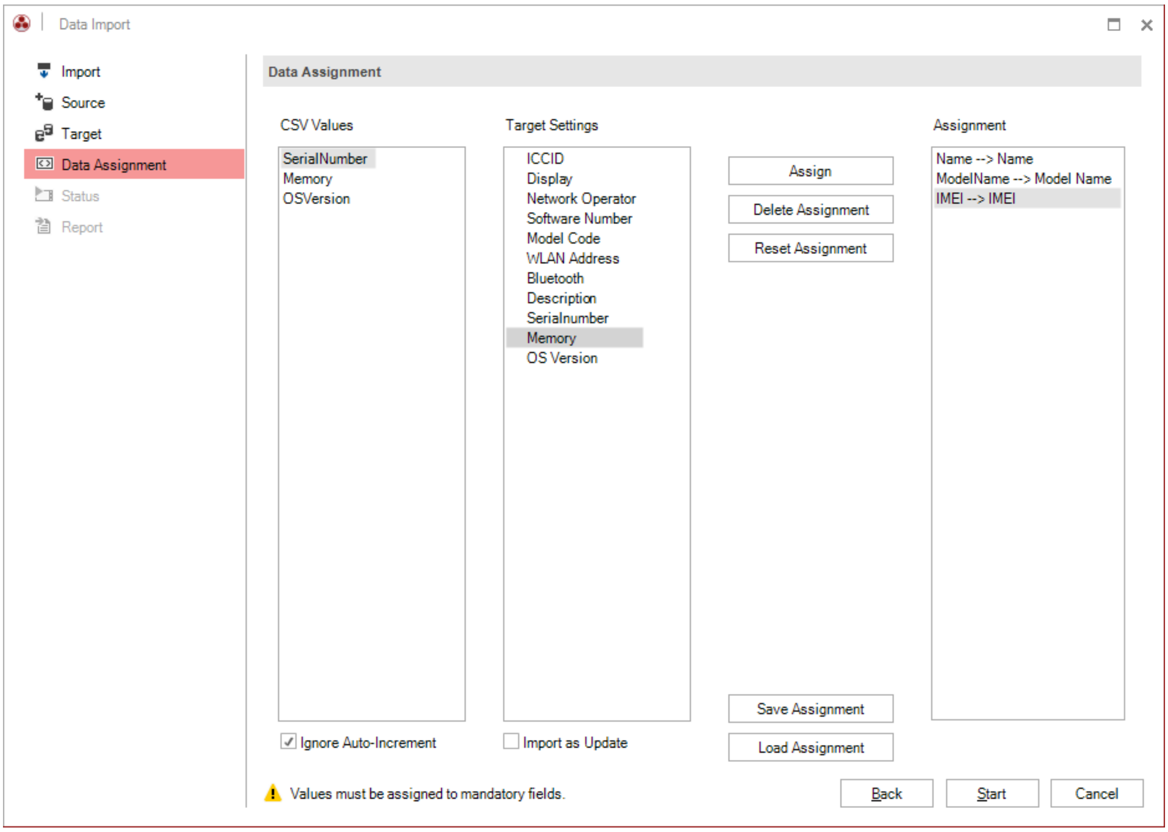
In the Data Assignment step, you can specify the columns to be used for storing the data to be imported. Mandatory fields, i.e. fields that must be filled in the database, are flagged by a yellow exclamation mark.

The *CSV Values* field lists the column headers from the CSV file. The *Assign* field shows all columns available in the selected table or all properties of the selected IT asset. To assign a field from the *CSV Values* field to a field listed in the *Target Settings* field, select the respective fields and click the *Assign* button to link them. To delete all assignments, click the *Reset Assignment* button.

When you click the *Save Assignment* button, an XML file which contains all specified assignments will be saved to the folder where the selected CSV file resides. If you later select the same CSV file, whose contents may have changed, again for import, load the assignments from this XML file by clicking the *Load Assignment* button. This way, you need not define the assignment again.

Columns filled with an auto-increment value will be hidden by default. To display them, enable the *Ignore Auto-Increment* checkbox.

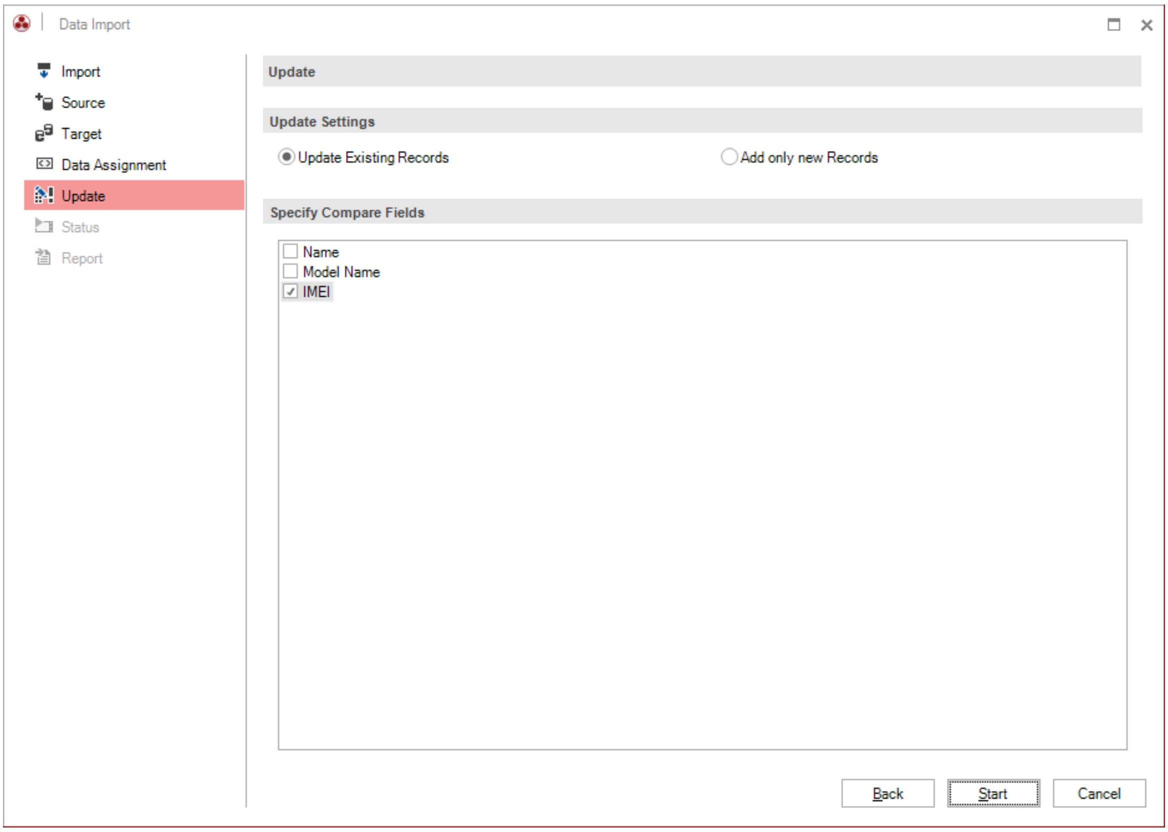
If you want to update previously imported data or compare new data with the previously imported data, enable the *Import as Update* checkbox. Then, you can specify settings related to the update in the *Update* step which displays next.



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.



Status

The Status page displays information about the status and progress of the current import process.

Final Report

The final report lists the number of records imported successfully and specifies whether the import of any records failed.

Part XV

15 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 installer places this executable in the *Tools* folder. Parameters can be passed when starting this program: The first parameter is *-ONC* with the actual ONC path enclosed in quotation marks. The ONC path determines the object to be expanded. If you enter an invalid or no ONC path at all, Docusnap will only be launched, but no node will be selected in the Explorer.

If Docusnap is not running while you start the DocusnapLink feature, the system looks for a valid installation and starts it, if one is found. If Docusnap is active, the Docusnap window will get the focus.

ONC (Object Numbering Convention) refers to a coded path which takes you to an actual node in the Docusnap tree views. It uniquely identifies each node in Docusnap. When data is exported using *Docusnap Connect*, the ONC for every single entry is exported as well. This ensures that the ONC value is available when a database exported through *Docusnap Connect* is used.

Settings you define in the *Options* dialog will be stored in a configuration file located on the computer where Docusnap is running. If multiple employees want to use the same settings when working in Docusnap, it is possible to start the program using a shared configuration file.

This central configuration file should also be used for the execution of DocusnapLink in order to start Docusnap with the desired settings. In this case *-UseConfig* is specified with the path of the location of the central configuration file in quotation marks as an additional parameter. For example *-UseConfig "\\sfile01\ita\Docusnap\Configuration.xml"*

If the link to Docusnap does not work, the parameter *-log* can be specified to output error messages in the command line.

The parameters for the path, the configuration and the logging can be specified in any order.

Part XVI

16 Settings

In the next sections, you will learn about the settings available in Docusnap.

Options

In the Docusnap Options dialog, you can specify settings that relate to the entire Docusnap application.

Layout (CI)

For some modules such as Reporting, Documentation or IT Concepts, you need to select the design to be used. In the Layout (CI) dialog, you can select a common design to be applied to all modules.
Company settings are helpful if you have to manage multiple companies in Docusnap. It may be necessary, for example, to define specific headers and footers for the reports generated for a certain company.

Permissions

Docusnap features an integrated user management. The User Management feature enables you to grant users access to the Docusnap controls and features and allows them to use extensions.

16.1 Options

Click the *General Options* button in the Docusnap Menu to open the *Options* dialog.

The Options dialog consists of the following pages:

General

Licensing

Database

Update

16.1.1 General

General Settings

If the *Show Network Maps* option is enabled, created network maps will be displayed on the *Documents* tab. Loading large network maps may take a long time. For this reason, it is possible to disable the output and automated loading of network maps.

The *Password Logging* feature allows you to track which user copied which password and / or displayed it in plain text. By checking the *Password Logging* checkbox, you can enable or disable the password logging functionality.

The language for the program will be determined in the *Options* dialog. Docusnap provides the choice of either English or German. The language for Docusnap will be set by selecting it from the combo box. For a language change to take effect, the program must be re-started.

System Path / Files

In order to use Docusnap in a multi-user environment, settings can be stored centrally so that they are accessible to each user. These so-called *team settings* will then be loaded from the path defined in the *Team Settings* field. To obtain consistent results, the same team settings path is used for the Docusnap client and Docusnap Server. If the path is changed in the options dialog, it will be changed for the Docusnap Server and vice versa, when both are connected to the same database. If no path was selected for the *Team Settings* or if that path no longer exists, the path specified for the *Local Settings* will be used.

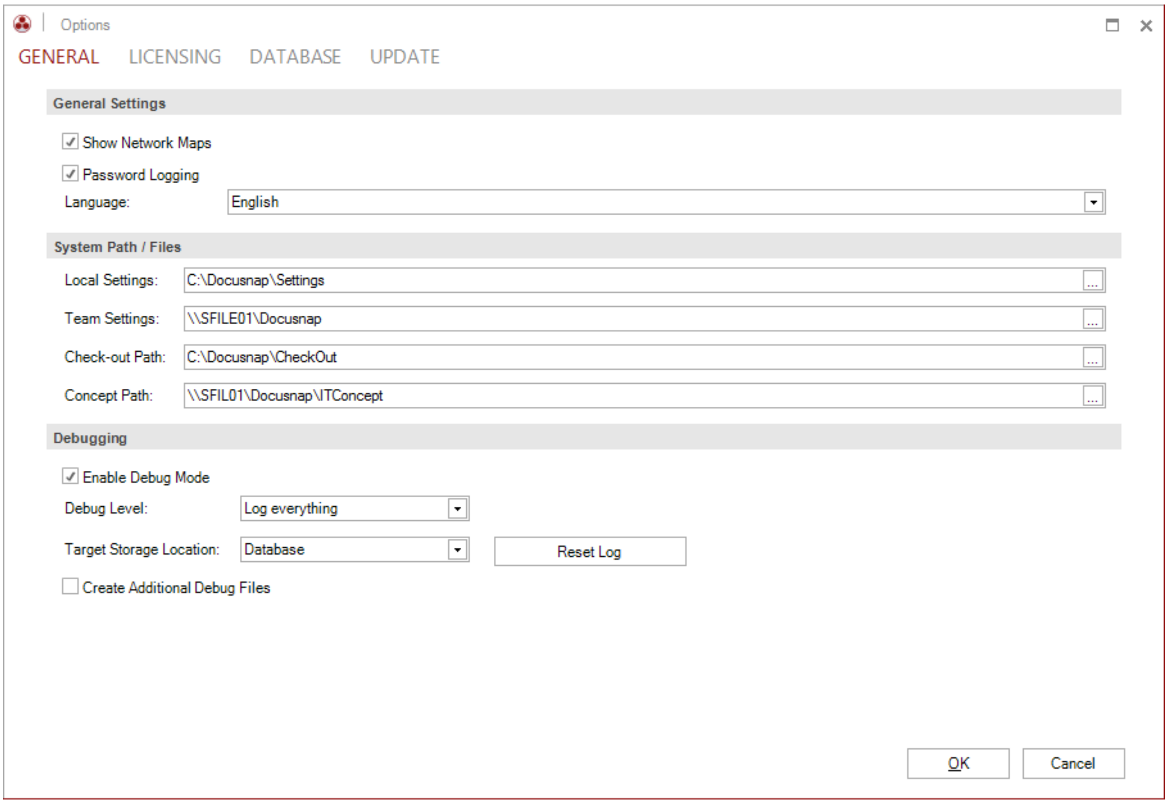
When you create Docusnap extensions (e.g. contracts, passwords, etc.), you can add attachments. Attachments are stored in the Docusnap database. If you need to edit an attachment, if first needs to be loaded from the database and then stored temporarily in a local directory. In the *Check-out Path* field, you can specify the path to be used for this purpose.

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

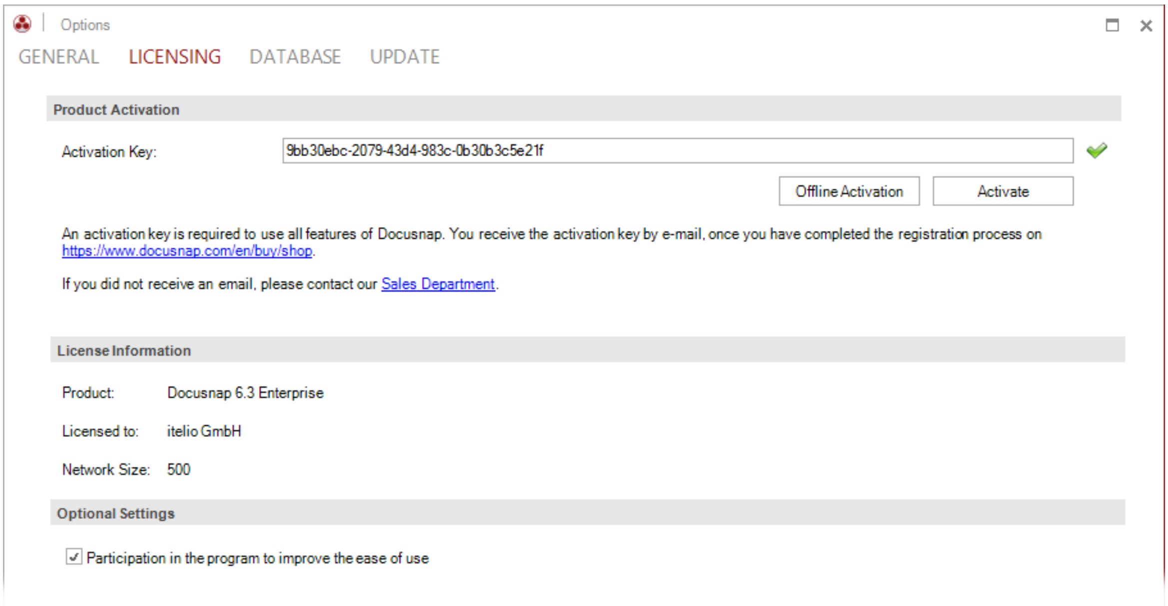
The debug mode helps you to obtain supporting information in case of problems. This information will be used by the Docusnap Support Team for efficient troubleshooting. Once this mode is enabled, any errors as well as additional information will be saved in the database. For more information on this 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.



16.1.2 Licensing

The *Licensing* page of the Options dialog shows information about the license currently in use. Insert in the Activation Key field the activation key received by e-mail. Click the Activate button, to check the license for validity.

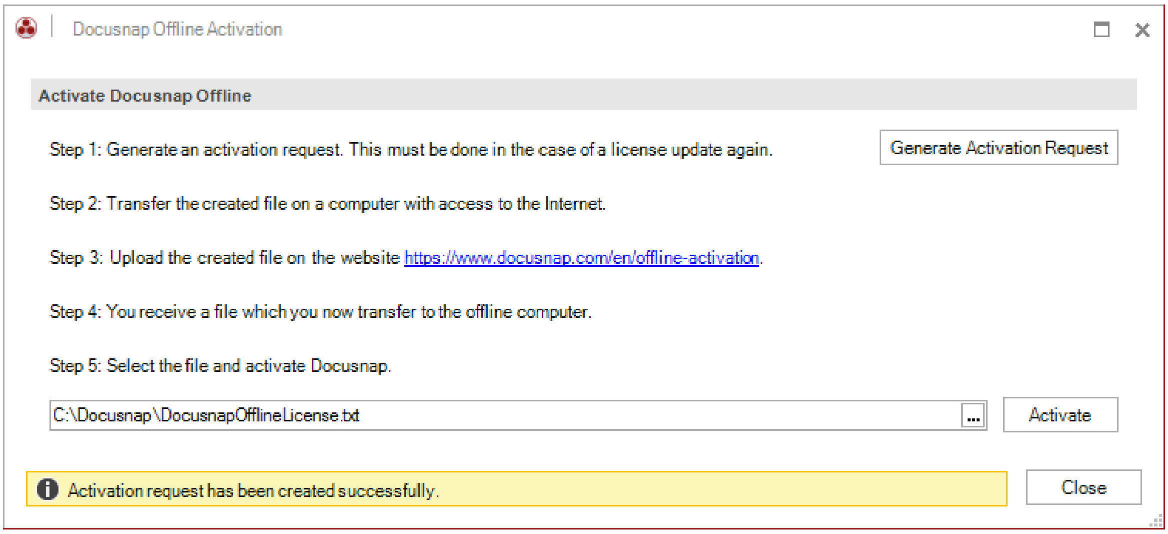


By using the offline activation it is possible to operate Docusnap in an isolated environment. In the first step it is necessary to enter the activation code. Then another dialog must be opened by clicking on the *Offline activation* button, by means of which the file (DocusnapActivationRequest.txt)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

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

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

Should modifications to the license setup be required, such as the extension of the number of licensed systems, the complete process of generating an activation request file, uploading it and importing the license file has to be repeated. Accordingly, the same steps are required if, for example, the virtual machine was reset.



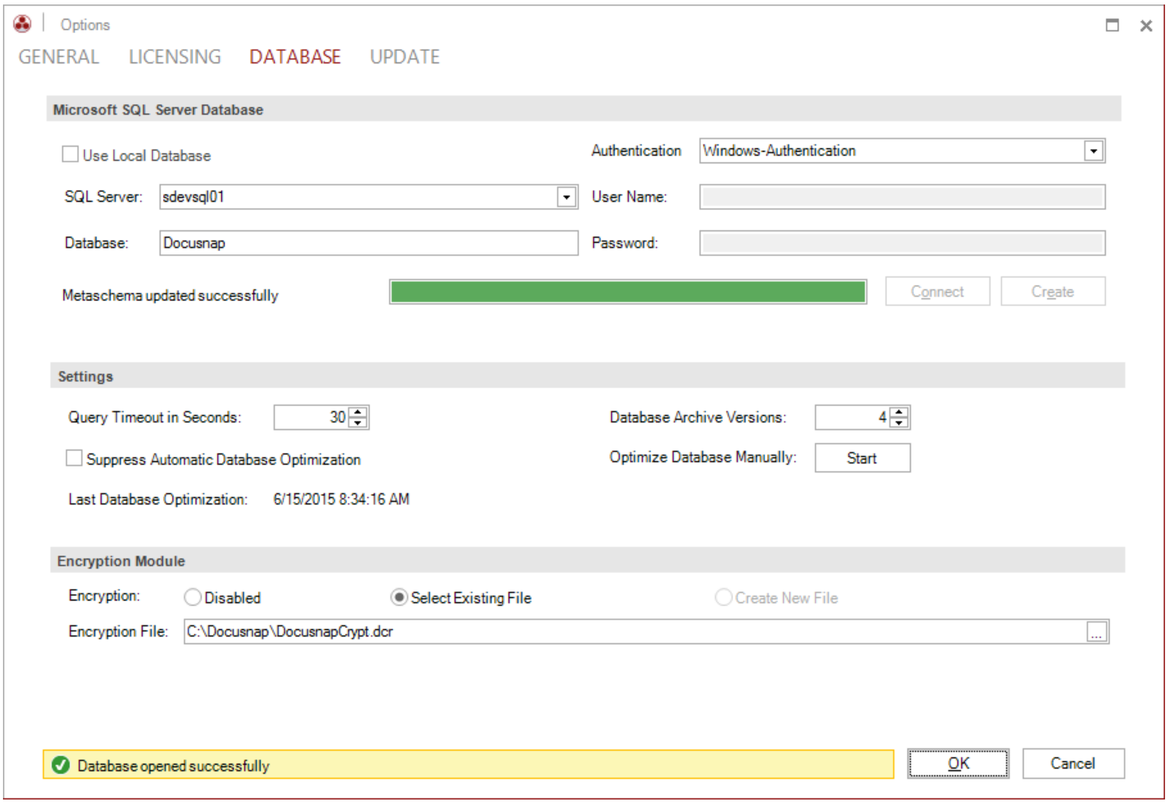
16.1.3 Database

On the *Database* page of the Options dialog, you can specify the database where the data will be stored. Docusnap supports Microsoft SQL Server and LocalDB.

SQL Server Database

In addition to the Microsoft SQL Server retail products (Standard 2005/2008 & Enterprise 2005/2008), the Express versions (2005/2008) of SQL Server are also supported.

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

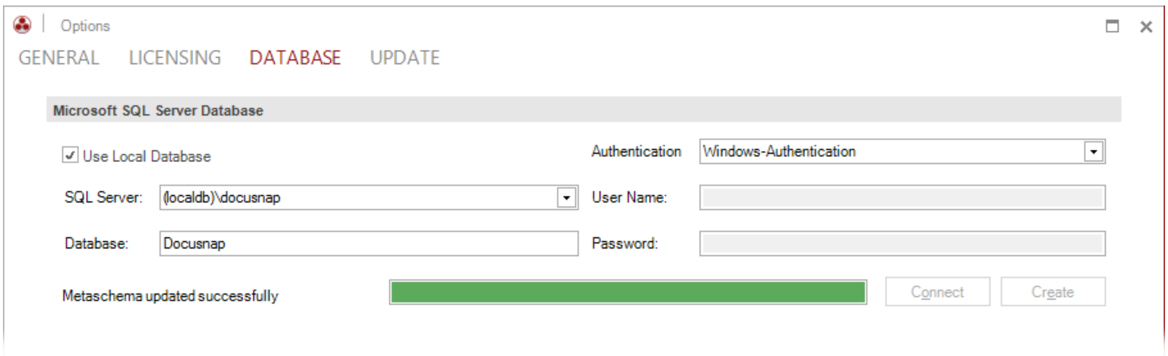


LocalDB

The LocalDB is a lightweight version of SQL Server, which can be used without complex or time consuming configuration. When installing Docusnap it can be decided whether the LocalDB should to be installed too.

By clicking the checkbox *Use LocalDB* the existing LocalDB instance for Docusnap is selected.

The files for the LocalDB databases are stored in the user profile. It is recommended that LocalDB only be used for smaller databases.



Settings

By default, the timeout for database queries is 30 seconds. For large databases, however, it may happen that database queries take longer. To execute these queries nonetheless, the query timeout can be increased.

The change of the Timeout will be stored in a configuration file located on the computer where Docusnap is running and will be used for every connection to a database.

The value specified in the *Database Archive Versions* field determines how many inventory scans of an object will be stored. If you set the *Database Archive Versions* field to 4, this means that the data of four inventory scans, e.g. for a Windows server, will be kept. When you perform the next inventory scan of that server, the scan with the oldest timestamp will be deleted so that the total number of inventory scans remains four. If particular inventory scans should not be deleted, you can exclude them from the automatic deletion using the Manage Snapshots dialog.

With the database optimization the indexes of the database are re-created, if necessary, in order to improve the database performance. The automatic optimization can be turned off via the checkbox *Suppress Automatic Database Optimization*. In addition the optimization can be started manually by clicking on the *Start* button.

Encryption Module

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

Make sure to treat the encryption file with great care, since it is not possible to replace or re-create this file should it become lost.

16.1.4 Update

Update Options

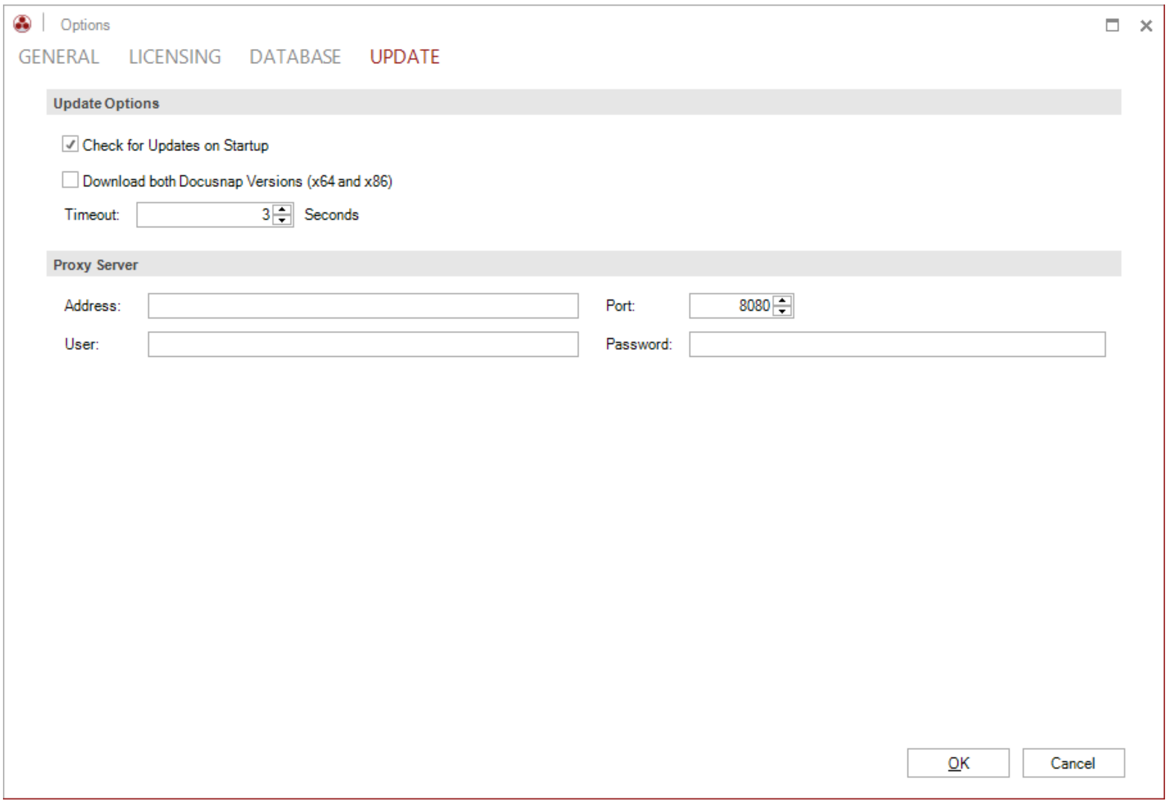
If the *Check for Updates on Startup* checkbox is enabled, Docusnap checks for new updates each time you start the program. To avoid the update check upon startup, clear the *Check for Updates on Startup* checkbox. The Update feature can also be started during program operation by clicking the *Update* button in the Docusnap Menu.

To update Docusnap even on systems that do not have an Internet connection, check the checkbox Download both Docusnap Versions (x64 and x86) to save the current Version during the next update in the Team Settings path. The next time Docusnap is started on a system without internet connection, the appropriate Docusnap version (x62 or x86) from the team settings will be installed.

In the *Timeout* field, you can specify (in seconds) how long the update routine will try to connect to the update server before a timeout occurs.

Proxy Server

By default, the proxy server set in the Internet Options of your machine will be used. If a different proxy server should be used for the update process, specify the details for this server in the Proxy Server group.



16.2 Layout (CI)

For some modules such as Reporting, Documentation or IT Concepts, you need to select the design to be used. In the Layout (CI) dialog, you can select a common design to be applied to all modules. In addition, you can change the settings for reports and IT concepts. All changes made to settings are only valid on the current computer.

Additionally it is possible to define the design specifically for one company. These settings will be saved in the database and will always be available when Docusnap is connected to this database.

Click the *Layout (CI)* button in the *Documents* ribbon to open the dialog.

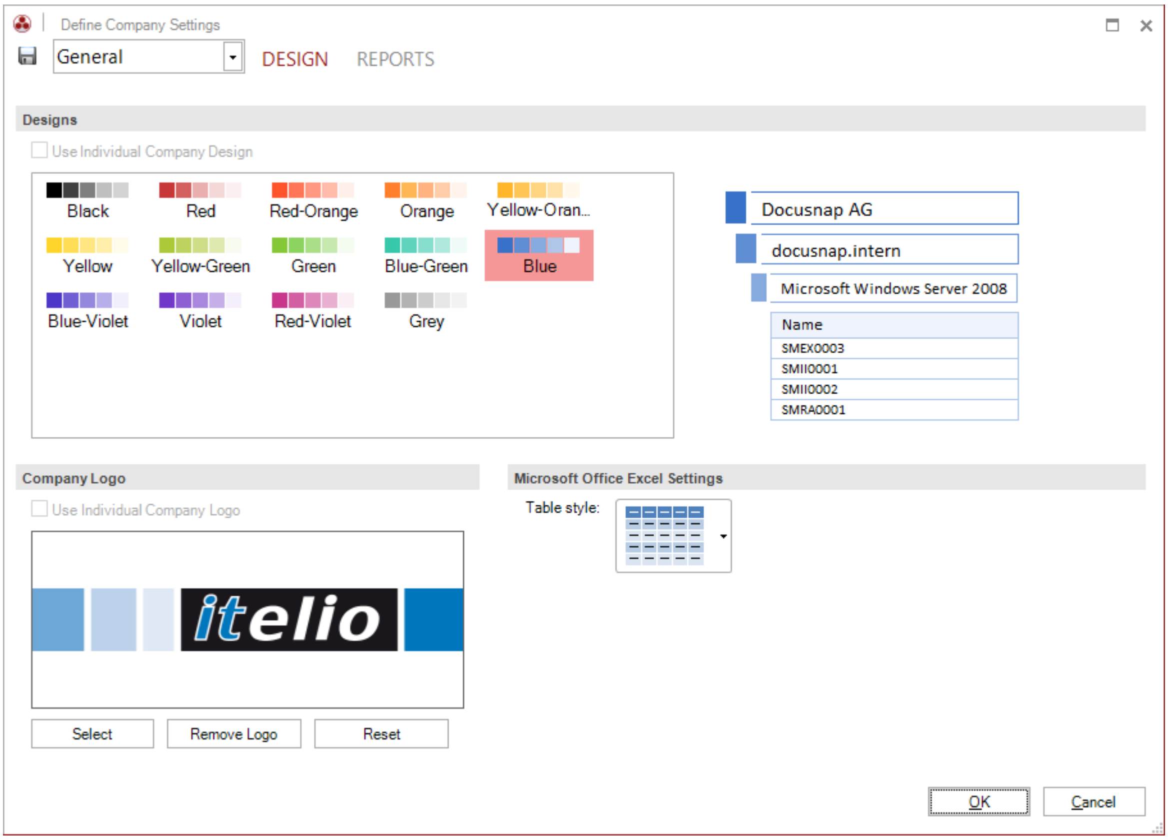
16.2.1 Designs

On the Designs page, you can select one of several predefined designs. The design you select here will be applied to reports and datasheets.

Additionally, you can select a customized image (company logo) in this dialog. This image will be shown in the header of the various documents and reports.

On the one hand you can select the design in general and on the other hand you can choose a design specifically for one company. In the combobox you can choose General or the name of the company for which the design should be saved.

Additional user-defined designs can be added in Docusnap Management.



Confirm the settings by clicking the button. If you switch to another company after modifying a setting without saving, the settings for the previously selected company will be reset. By clicking the OK button you can save the changes for the current company and close the dialog.

16.2.2 Report Settings

The report title is shown in the header. In addition, the header may include a logo. Page numbers will be inserted in the footer. The cover page will include the report title, a description (if specified), the report creation date, the author and the page count. By clicking the Design button, you can open the report in the Designer to customize it.

Using the *Show Cover, Show Header* and *Show Footer* checkboxes, you can specify whether those report elements will be included in the report.

Company Design

If a company is selected in the combobox, you can select one of the following Status settings: *Master Settings*, *Do not Use* or *Individual Settings*.

- *Master Settings*

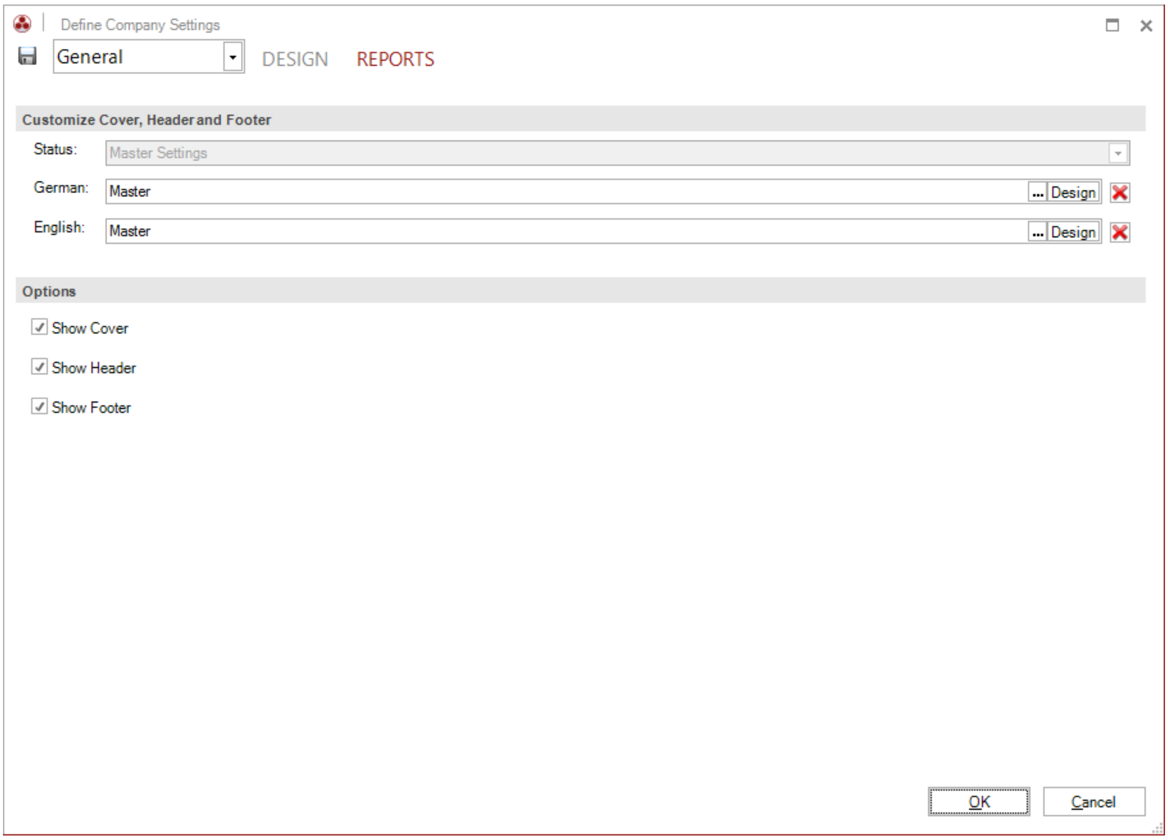
  If you select the Master Settings option, the system uses the default specified for the general use. If you only want to change the color of the header, footer or cover page for the selected company, it is sufficient to customize the design from the *Design* page.

- *Do not Use*

  If you select the *Do not Use* setting, the header, footer and cover page will not be used in the reports.

- *Individual Settings*

  If you select the *Individual Settings* option, you can create a company-specific report with a customized header, footer and cover page. Click the Design button to open the current report template and adjust it for the selected company. The adjustments on the company level are stored in the database.



16.3 Permissions

Docusnap features an integrated user management. The User Management feature enables you to grant users access to the Docusnap controls and features and allows them to use extensions. User management will be enabled once you have created and saved the first user in the Docusnap Management. If no users have been defined, any user who connects to this database may use all of the controls and the entire Docusnap functionality.

Additionally you can control who has access to which data individually. The permissions are assigned on the object in the tree views. Permissions can be set at the record or object level. This means that a user may only process data of a certain workstation or of all workstations.

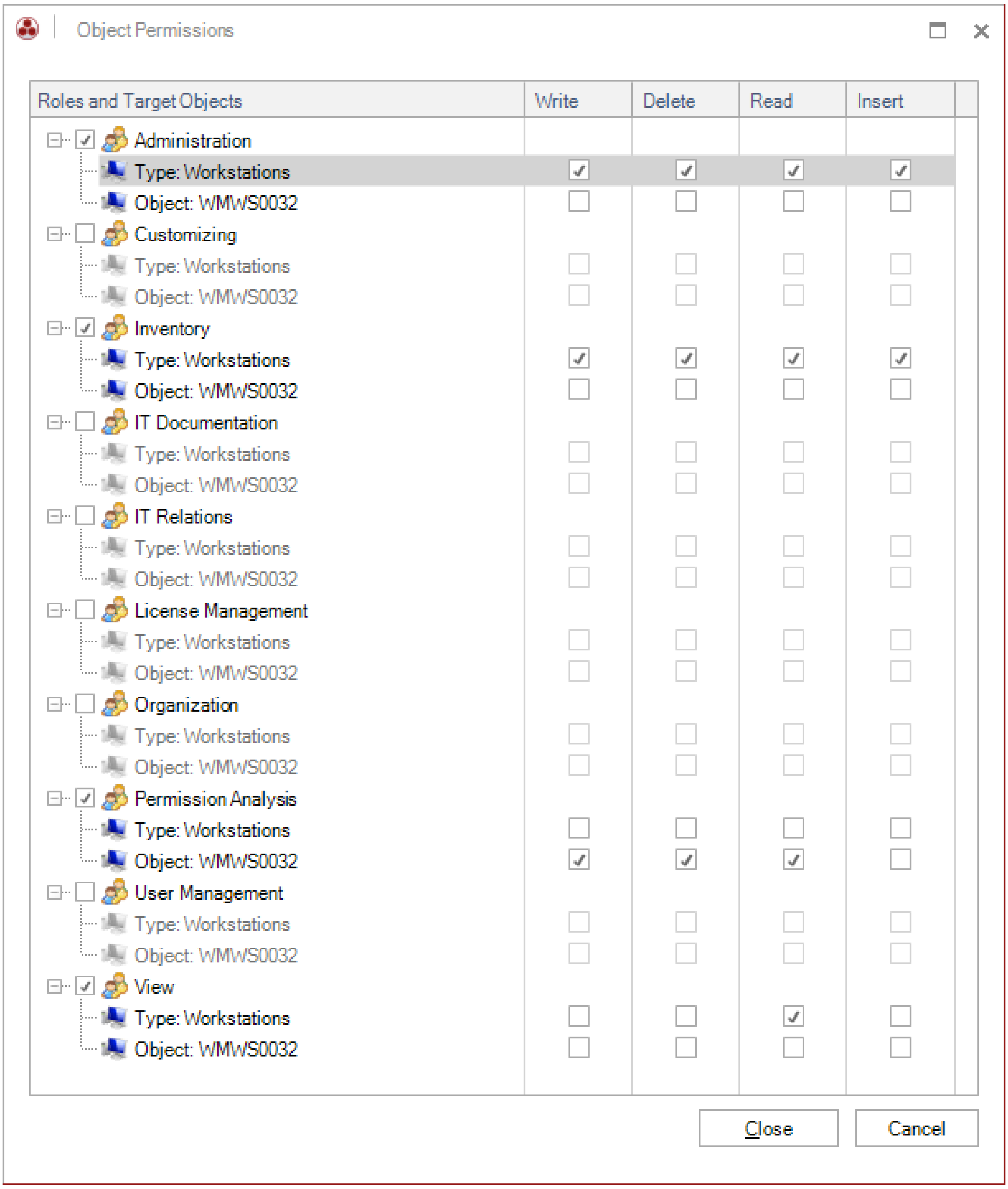
If permissions to an object have not been set, all users can process all entries. As soon as an object has been assigned a permission, this permission becomes active and only users to whom the corresponding role has been assigned will be able to see these entries.

To open the *Object Permissions* dialog, select the desired object in the tree view, right-click and select *Permissions* from the context menu.

The dialog displays all roles that are currently defined in the Docusnap database. Both the object selected in the tree view as well as the type of the object are displayed below the role node. Permissions set for the selected object will only apply to this single object. However, if you set permissions for the object type, they will apply to all objects assigned to that type, e.g. to all workstations. In case you have defined permissions for a *related type* object type, these permissions on the type level will apply to the *related type* as well.

The permissions are granted additively. This means that, if a user is granted a permission for a certain role, and the same permission has not been set for another role he is assigned to, the permission will be granted all the same. The highest permission level is the one that matters.

The following permissions can be granted in this dialog: *Read*, *Write*, *Delete* and *Insert*. If the *Read* permission is granted, the entries in the tree view will be displayed. If the *Write*, *Delete* and *Insert* permissions are granted, the *Save*, *Delete* and *New* buttons on the ribbon will be enabled. To enable the Save, Delete and New buttons, the user must also be assigned a role which has the right to use these buttons.


Object Permissions
Roles and Target Objects
Write
Delete
Read
Insert
Administration
Type: Workstations
Object: WMWS0032
Customizing
Type: Workstations
Object: WMWS0032
Inventory
Type: Workstations
Object: WMWS0032
IT Documentation
Type: Workstations
Object: WMWS0032
IT Relations
Type: Workstations
Object: WMWS0032
License Management
Type: Workstations
Object: WMWS0032
Organization
Type: Workstations
Object: WMWS0032
Permission Analysis
Type: Workstations
Object: WMWS0032
User Management
Type: Workstations
Object: WMWS0032
View
Type: Workstations
Object: WMWS0032
Close
Cancel

Part XVII

17 Data Organization and Analysis

The Data Organization and Analysis section covers Docusnap features that enable you to analyze and organize the collected data.

Comparing Data

Using the Compare Data function, you can compare the data resulting from two scans (snapshots) to find the differences.

Managing Snapshots

Using the Manage Snapshots feature, you can delete individual snapshots or flag them as undeletable.

System Groups

Using the Docusnap System Groups feature, you can group systems logically and create network maps for partial networks based on particular system groups.

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.

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.

17.1 Comparison

Using the *Compare Data* feature, you can compare system configurations at various points in time.

Multiple snapshots can be compared with each other. The differences found by the comparison will be shown in a report. You can only open the *Compare Data* dialog after selecting a node in the tree view.

To open the *Compare Data* dialog, click the button at the top of the tree view.

The Start Point indicates the node where the comparison will begin.

A tree can have many levels. In order to compare only a certain number of levels, you can specifying a limit value in the *Levels* field. To compare all levels, tick the *Compare all Levels* checkbox. If you want to restrict the comparison to the differences, enable the *Show only Differences* checkbox. The captions will, however, always be shown in order to clarify the structure.

The changes will be highlighted in color according to the following pattern:

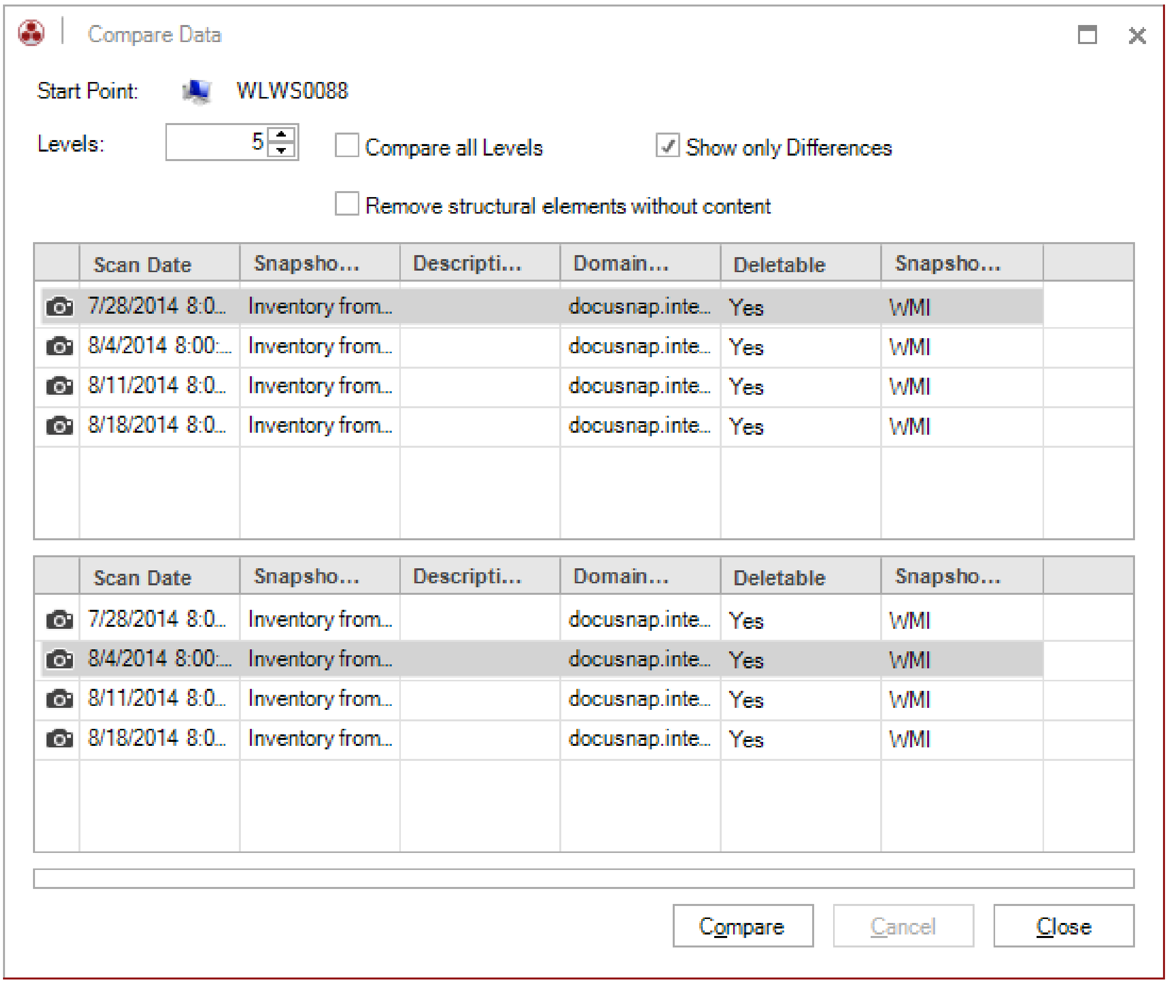
Changed	red
New	green
Deleted	blue
Unchanged	black

If the *Show only Differences* option has not been checked, the final report will include all data (even the unchanged ones).

By checking the checkbox *Remove structural elements without content* captions of areas, where no differences were identified, are removed from the report. As a result, the number of pages of the report can be reduced.

The available snapshots for the selected nodes are displayed in two lists. Docusnap always displays the snapshots that are located at the same level as the selected node or below it. If you select a node for which no corresponding snapshots exist, Docusnap will provide the snapshots that are located above that node for comparison.

In order to obtain relevant results, you should only compare snapshots resulting from scans of the same systems. When you click the *Compare* button, the snapshots will be compared and the results will be shown in a report. To cancel a running comparison, click the *Cancel* button. To close the dialog, click the *Close* button.



The report can be exported from the Reporting ribbon. For the export, several file formats are available. You can select the desired format by clicking the *Export* button. When you click a format, a dialog appears where you can specify the range of report pages to be exported. Click the plus sign to expand the settings dialog. Then, you can select format-specific settings. If you want the file to open automatically after it has been saved, enable the *Open After Export* checkbox.

17.2 Snapshot Management

To open the Manage Snapshots dialog, click the *Snapshots* button on the *Inventory* ribbon.

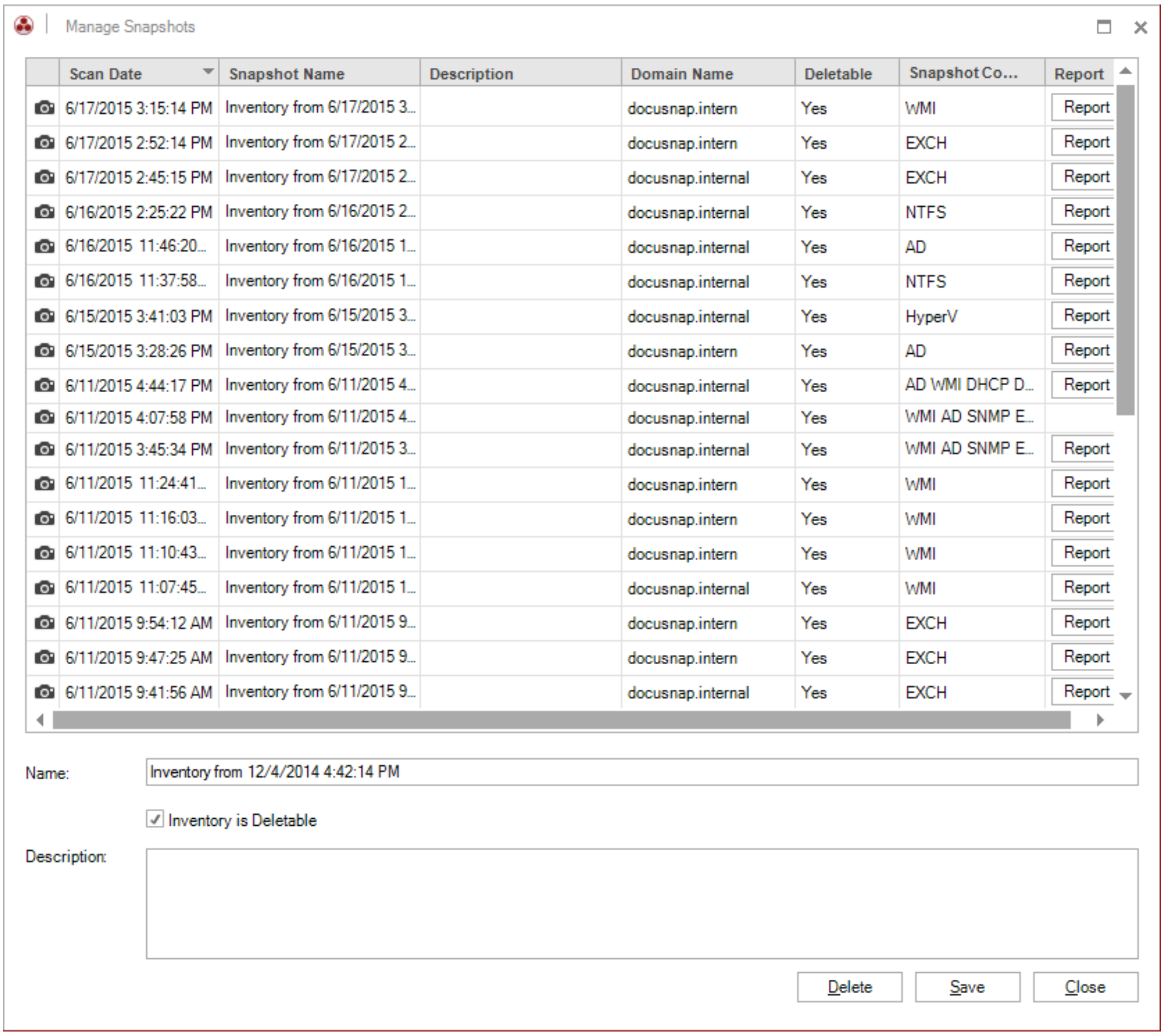
Each time you perform an inventory scan, Docusnap creates a snapshot. Its name is *Inventory from*, with the current timestamp appended to it. This dialog lists all snapshots that have been saved to the database. If required, you can rename a snapshot. Enter the new name in the *Name* field.

You can add a description to each snapshot. If you want to compare two snapshots, the descriptions can be very helpful in selecting the correct ones.

In Docusnap, only a certain number of snapshots is saved for each system. You can set this number in the Options dialog. If this number is exceeded, the oldest snapshots will be deleted. If you want to retain a snapshot, exclude it from the automatic deletion process by clearing the *Scan is Deletable* checkbox. Undeletable snapshots will not be counted among the number of archived snapshots.

To delete a snapshot, select it and then remove it from the database by clicking the *Delete* button.

When you delete a snapshot, all associated data will be deleted along with it!

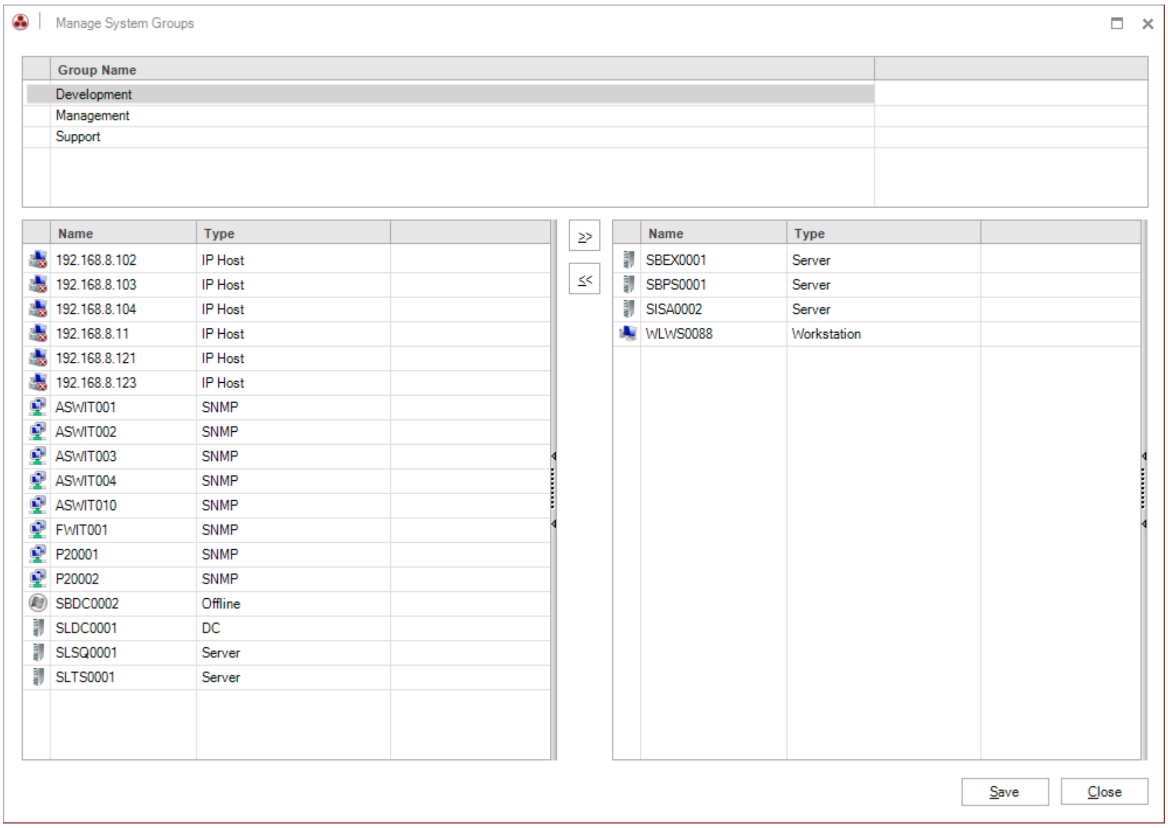


17.3 System Groups

The purpose of system groups is to document individual portions of a network. When creating the documentation, you can define the groups to be included.

To open the Manage System Groups dialog where you can manage system groups, click the *System Groups* button on the *Inventory* ribbon. To create the System Groups open the Docusnap Management.

All existing groups are listed in the top pane and may be selected for editing.



After the group has been saved, or an already saved group has been selected, all systems existing in the selected domain will be displayed in the table on the left of the dialog. In order to find a certain system to be included in the system group, you can filter the list of systems.

To add systems to the current system group, select them in the left table and click  to move them to the right table. All systems listed in the right table belong to this system group. To remove one or more systems from the group, select them and click the  button to move them to the left table.

Save the changes made to the systems in this group by clicking the *Save* button at the top of the dialog. To close this dialog, click the *Close* button.

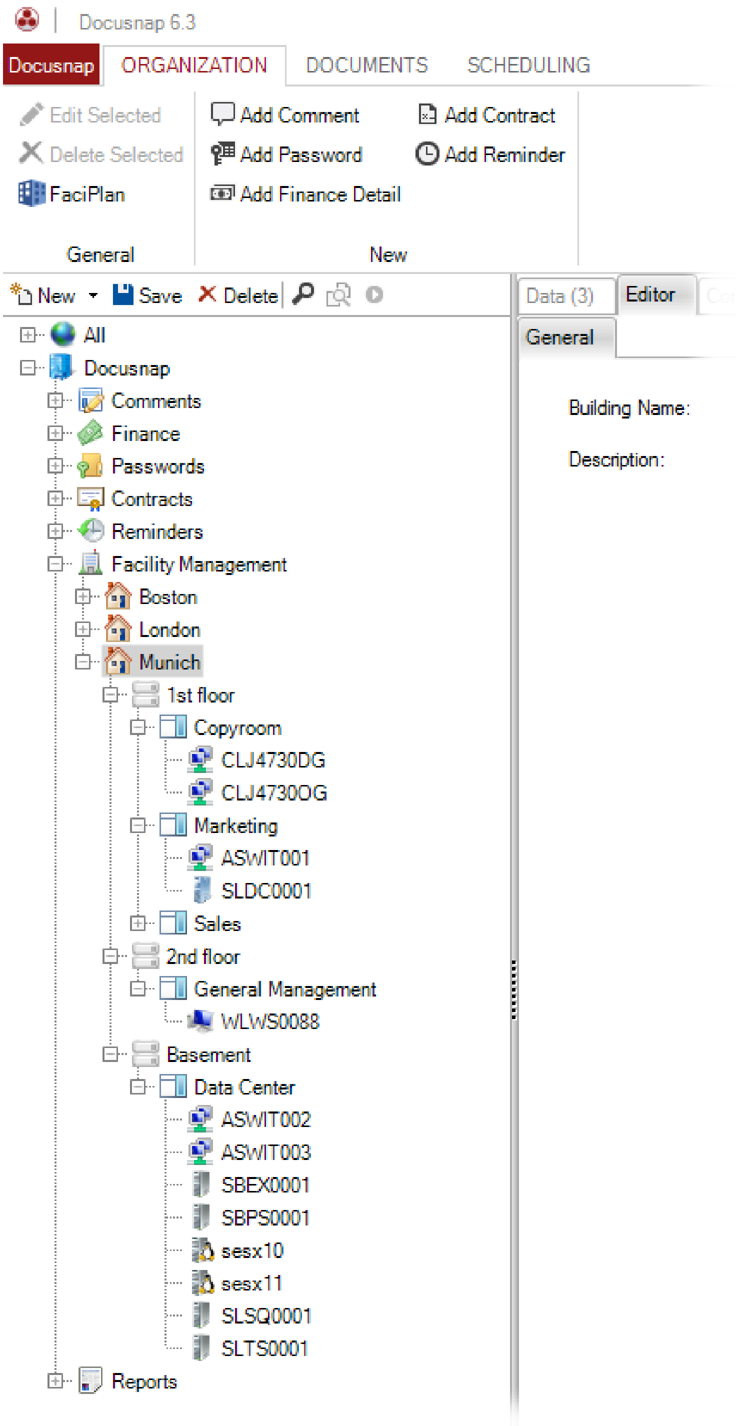
17.4 FaciPlan

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.

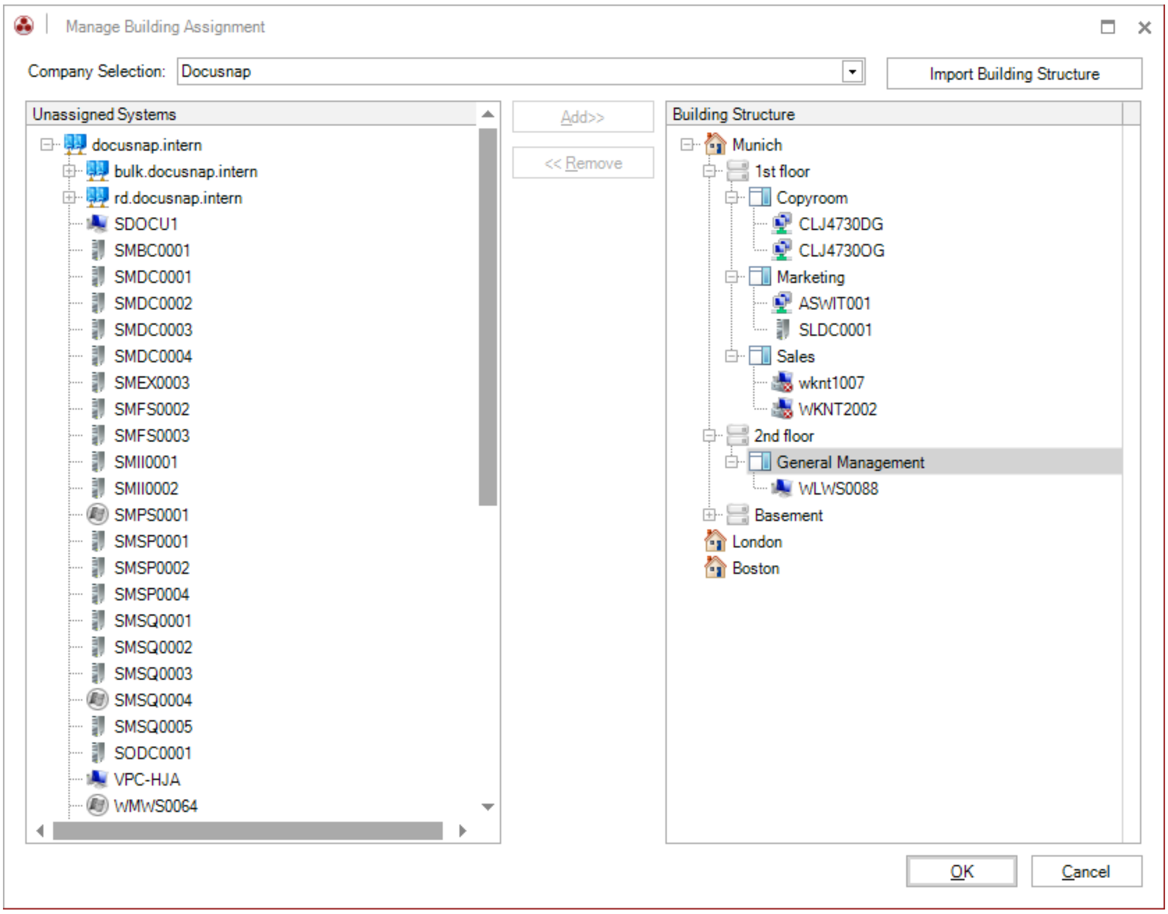
Managing Equipment in Docusnap

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 *Organization* 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.



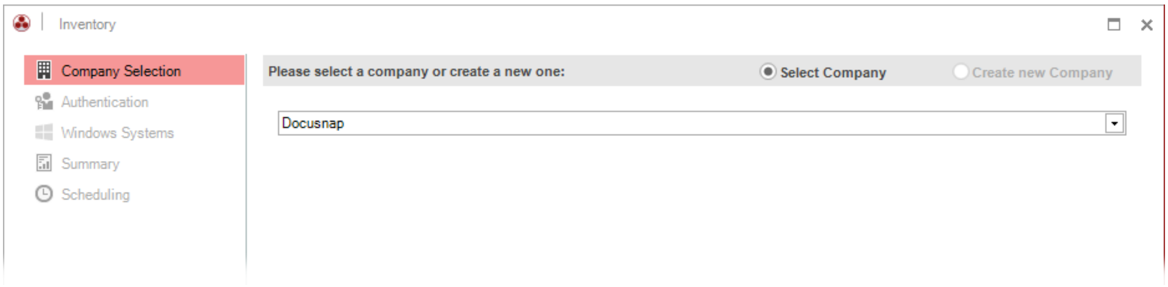
17.5 ADS Comparison

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 *Inventory* ribbon.

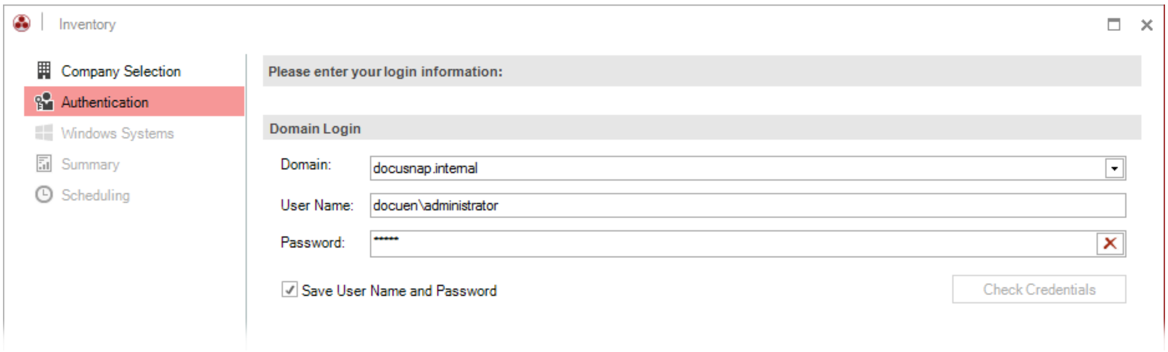
Company Selection

In the first step, select the company where the domain to be synchronized is located. As this process consists in comparing data from an existing company, you cannot create a new company from the ADS Synchronization wizard.



Authentication

In the second step, you need to select the domain to be synchronized. Select the desired domain in the *Domain* combo box. Then, enter valid credentials for this domain in the *User Name* and *Password* fields. Next, you need to check whether the user is a member of the domain and the password is correct by clicking the *Check Credentials* button. Only if this check is OK, the *Next* button will be available. If you do not specify a user name, the authentication will be performed based on the current user's login data. If you enable the *Save Username and Password* checkbox, this information will be stored for the next synchronization process.



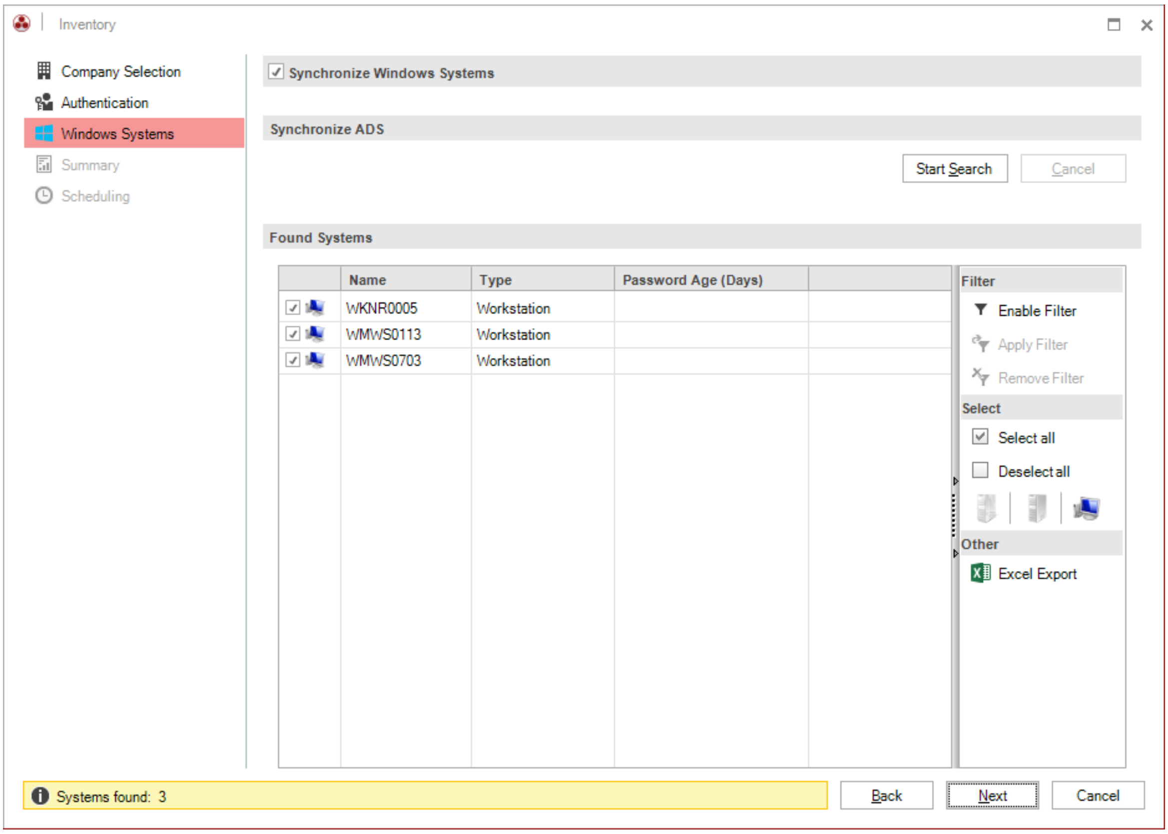
Windows Systems

When you click the *Start Search* button, Docusnap will compare the inventoried Windows computers with the Active Directory system. To abort this process, click the *Cancel* button.

When the search is complete, all Windows computers that have been scanned by Docusnap before, but no longer exist in the Active Directory system, will be displayed in the table. If the checkbox next to a system is enabled, this system will be deleted from the Docusnap database in the next step. By default, all systems are selected.

The table can be filtered using the Filter functions. For more information on filtering, see the Filters section.

Under *Select*, you can either select or deselect all devices.

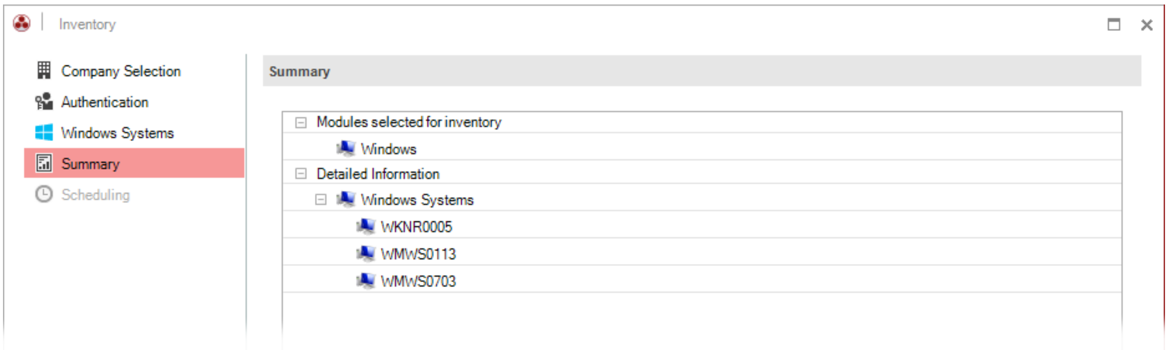


All systems of a domain that have been scanned during an IP Segment inventory process or that belong to a system group will also be deleted.

For this reason, it is recommended to create a separate domain for system groups if you do not want to delete them.

Summary

When you click the *Next* button, the next step displays where you can see all systems marked for deletion.



Scheduling

Through Scheduling, you can specify that the ADS Synchronization routine will start automatically at a later point in time. In the *Scheduling* step, you can define whether the ADS Synchronization routine will be a one-time or a recurring event. Please note, however, that this feature can only be used if the Docusnap Server is installed on a system in the network.

Status

Once you started deleting the devices, the dialog will display the progress of the deletion process. To abort this process, click the *Cancel* button. All systems with the *Completed* status have been deleted from the database. Systems for which the deletion process has not been completed yet remain in the database.

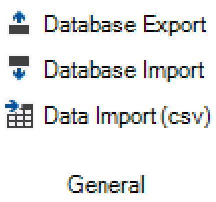
Final Report

On the Report page, you can see which computers have been deleted successfully. To close the wizard, click the *Close* button.

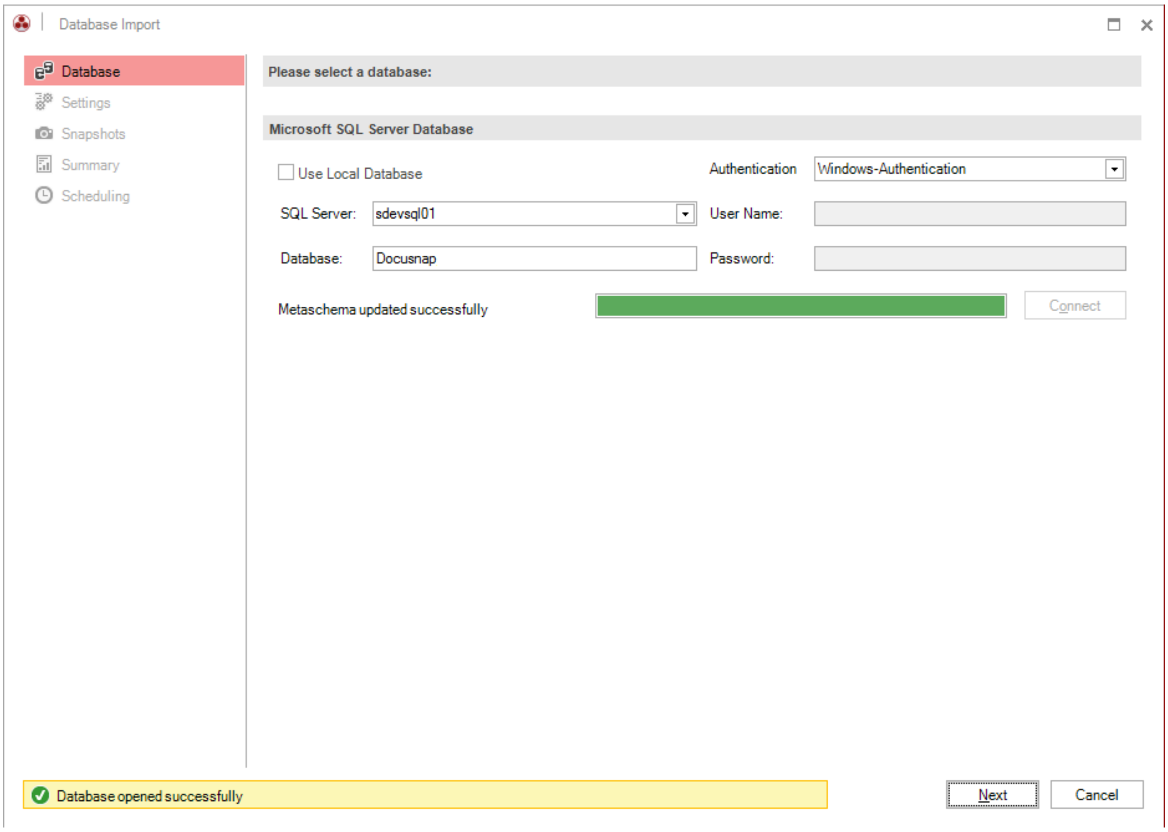
17.6 Database Import

Docusnap allows you to export data for import into another database. This way, it is possible to get the data from a temporary database on a notebook into a central database.

To open the Database Import dialog, click the *Database Import* button on the *Data* ribbon.



In the first step, you need to select a source database from which the data will be imported. For this purpose, you can select an SQL or a local database. These two database systems are fully compatible with each other. This means that data exported from an SQL database can be imported into a local database, and vice versa.



In the next step, select the import settings. The companies and domains that exist in the database to be imported are displayed on the left. The companies existing in the target database are displayed on the right. You can import an entire company, or an individual domain into the target database. As you go, you can either import the domain data to an existing company, or you can re-create the original company from the source database.

For the target database, you can decide to re-create the company from the source database in the target database or to integrate the data into an existing company. If you select the *Integrate Company from Source Database* option, a new company will be created. If a company with the same name already exists, a second company with this name will be created.

If you select the *Integrate in an existing Company* option, the exported data will be integrated into the selected company.

When assigning companies automatically, Docusnap does not compare by company name, but rather uses an internal GUID (Globally Unique IDentifier). This may result in two companies existing with the same name after the export. The best method is to select a company in the target database explicitly.

During the import process, Docusnap will check whether a specific snapshot has already been imported. If this is the case, this snapshot will be excluded from the import process. Furthermore, Docusnap will check for each system whether the number of allowed archives will be exceeded. The oldest snapshots will be deleted, if necessary.

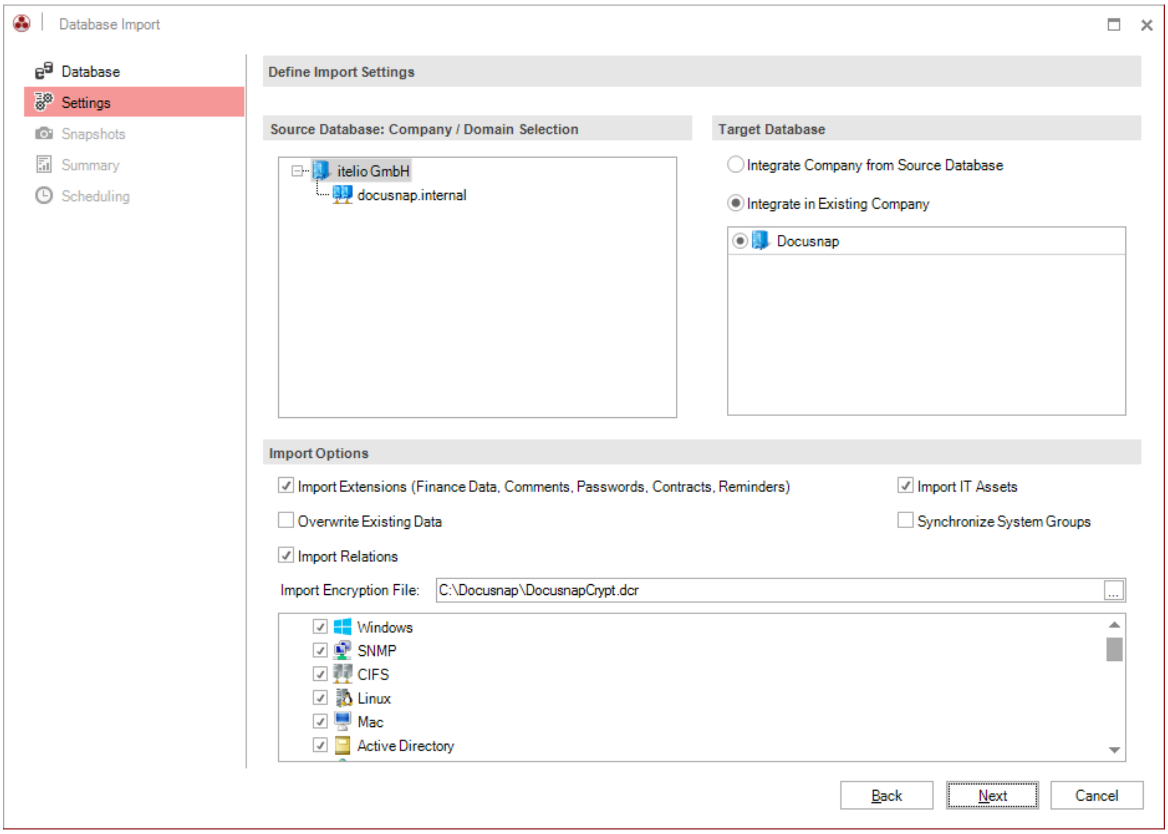
To import extensions associated with source database objects, enable the *Import Extensions* checkbox in the *Import Options* group.

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 relations that exist in your database, enable the *Import Relations* checkbox.

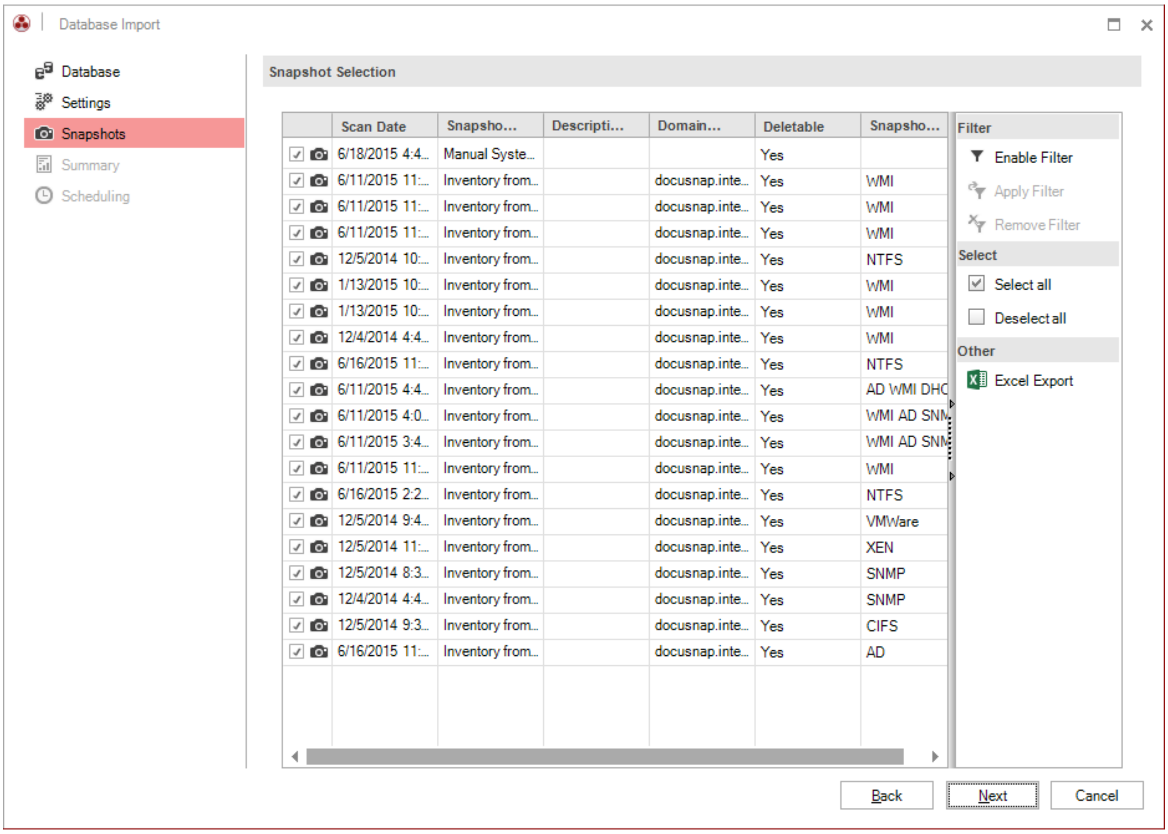
In addition, you can import any passwords that have been created. For this purpose, an encryption file is required. To select it, click the ... icon and select the file. Its name will then be displayed in the *Import Encryption File* field.

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.

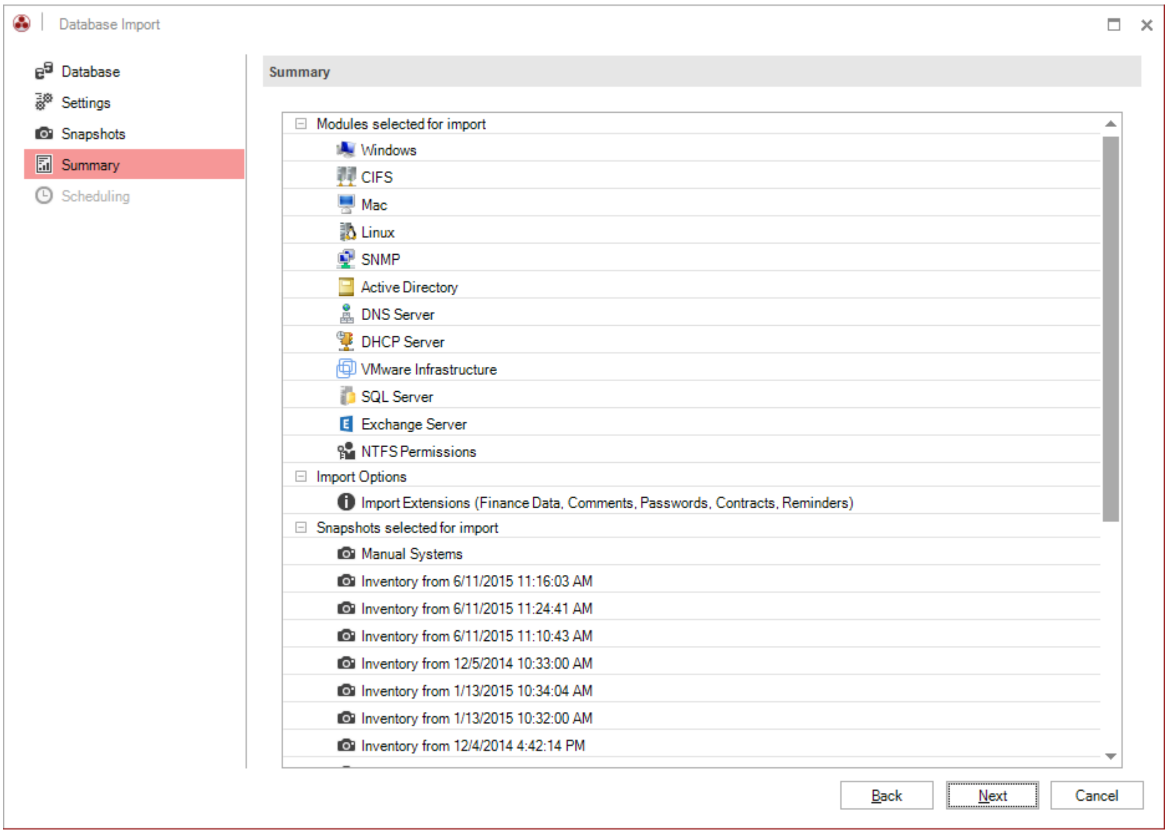


Here, a list of snapshots from the selected source database is displayed. To find snapshots more quickly, you can either name them when doing the inventory scan, or you can assign a name to them in the Manage Snapshots dialog. To the right of the snapshot list, a filter is available for easier selection of individual snapshots.

If the number of archives has been set to 4 in the Options dialog and the source database contains, for example, seven snapshots with WMI data, the 3 oldest snapshots will not be imported!



Finally, a summary page provides an overview of the modules and snapshots to be imported. If you want to change any of the data import settings, click the *Back* button. Click the *Next* button to switch to the *Scheduling* step.



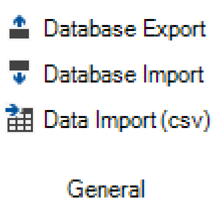
Through Scheduling, you can specify that the Data Import routine will start automatically at a later point in time. In the *Scheduling* step, you can define whether the import will be a one-time or a recurring event. Please note, however, that this feature can only be used if the Docusnap Server is installed on a system in the network. If the data import is scheduled, the schedule is saved by clicking on the *Finish* button and the wizard closes. If the checkbox *Schedule Database Import* was not activated, click the *Start* button to start the import process.

During the database import, its status will be displayed. To abort the import process, click the *Cancel* button. The data that has been imported up to that moment will be retained in the target database. Finally, the Report page will be displayed.

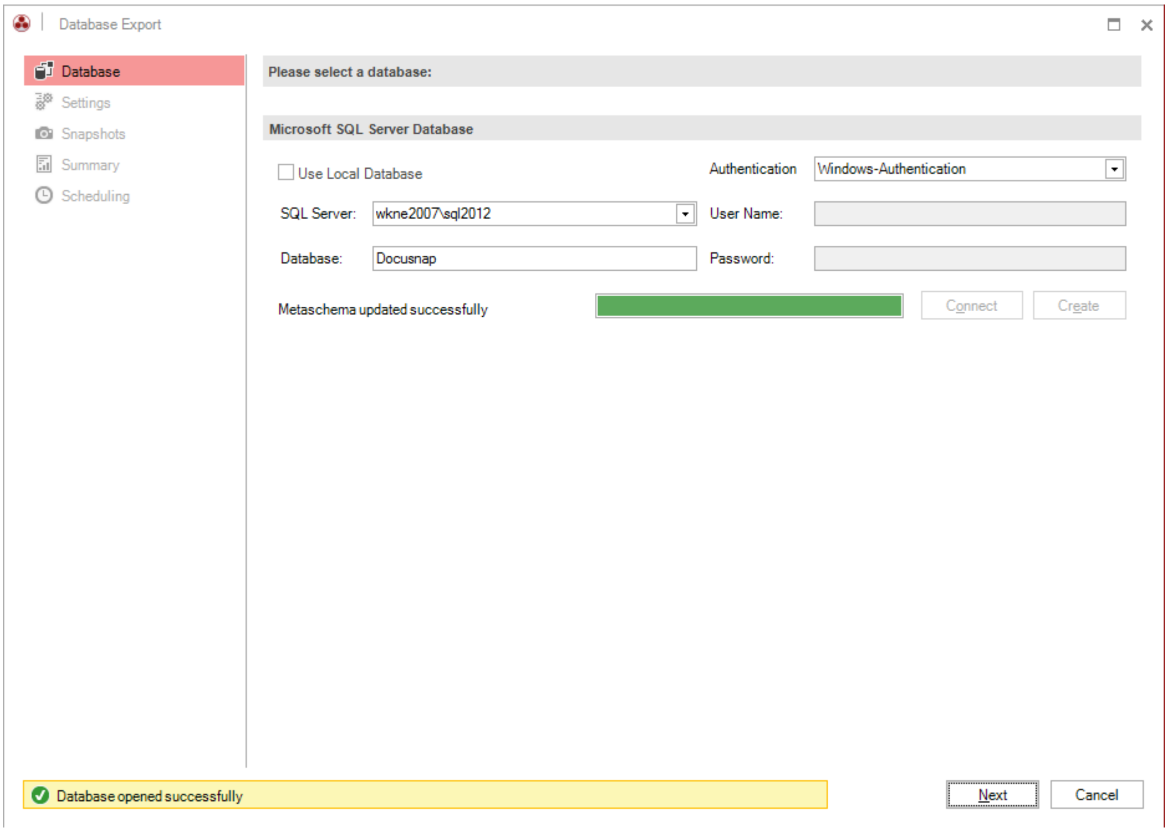
17.7 Database Export

With Docusnap, you can import data from another database.

To perform a data import, click the *Database Export* button on the *Data* ribbon.



In the first step, select the target database to which the data is to be exported. For this purpose, you can select an SQL or local database. These two database systems are fully compatible with each other. This means that data exported from an SQL database can be imported into a local database, and vice versa.



In the next step, specify the export settings. The left column lists the companies and domains that are found in the database to be exported. The companies existing in the target database are displayed on the right. You can export an entire company or an individual domain to the target database. As you go, you can either export the domain data to an existing company, or you can re-create the original company from the source database.

For the target database, you can decide to re-create the company from the source database in the target database or to integrate the data into an existing company. If you select the *Integrate Company from Source Database* option, a new company will be created. If a company with the same name already exists, a second company with this name will be created.

If you select the *Integrate in existing Company* option, the data will be integrated into the selected company.

When assigning companies automatically, Docusnap does not compare by company name, but rather uses an internal GUID (Globally Unique IDentifier). In some cases, two companies with the same name might exist after the import.
The best way to avoid this situation is to explicitly select a

company in the target database.

During the export, Docusnap will check whether a specific snapshot was exported before. If this is the case, the corresponding snapshot will be excluded from the export. Furthermore, Docusnap will check for each system whether the number of allowed archives will be exceeded. The oldest snapshots will be deleted, if necessary.

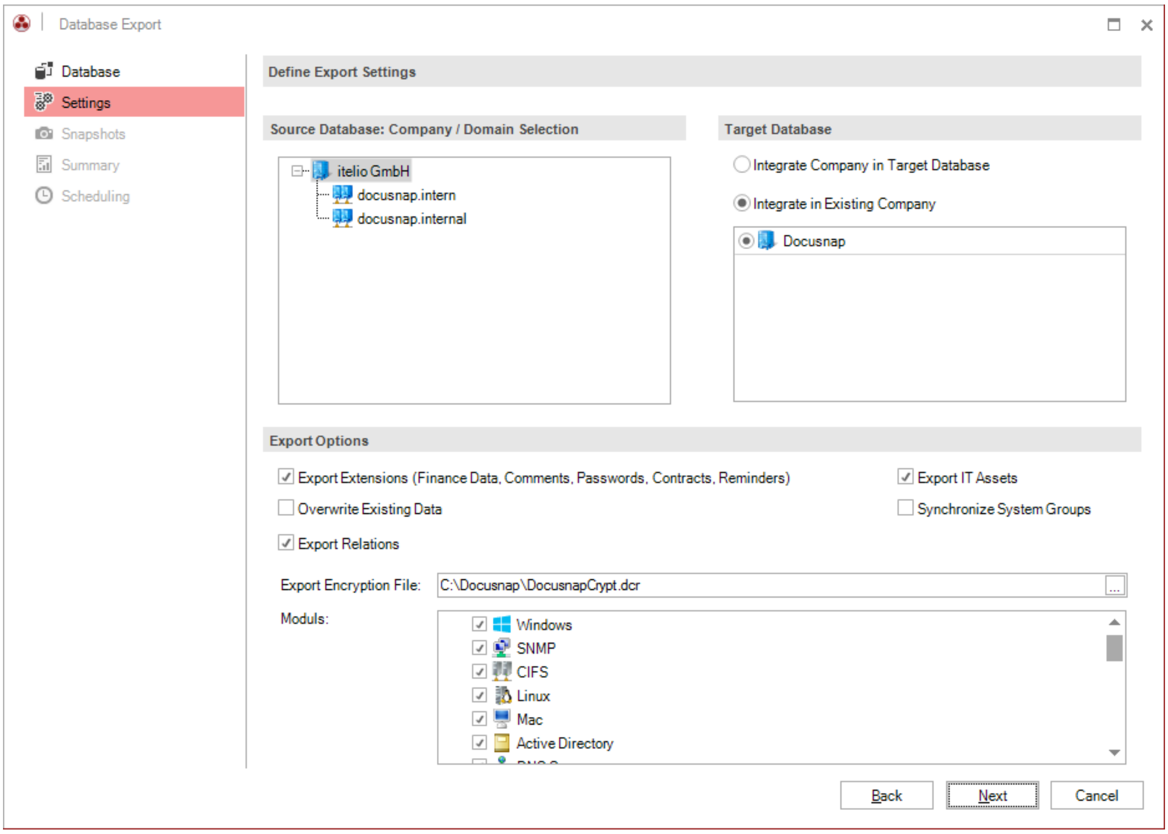
To export existing extensions associated with source database objects, enable the *Export Extensions* checkbox in the *Export Options* group.

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 relations created in your database as well, enable the *Export Relations* checkbox.

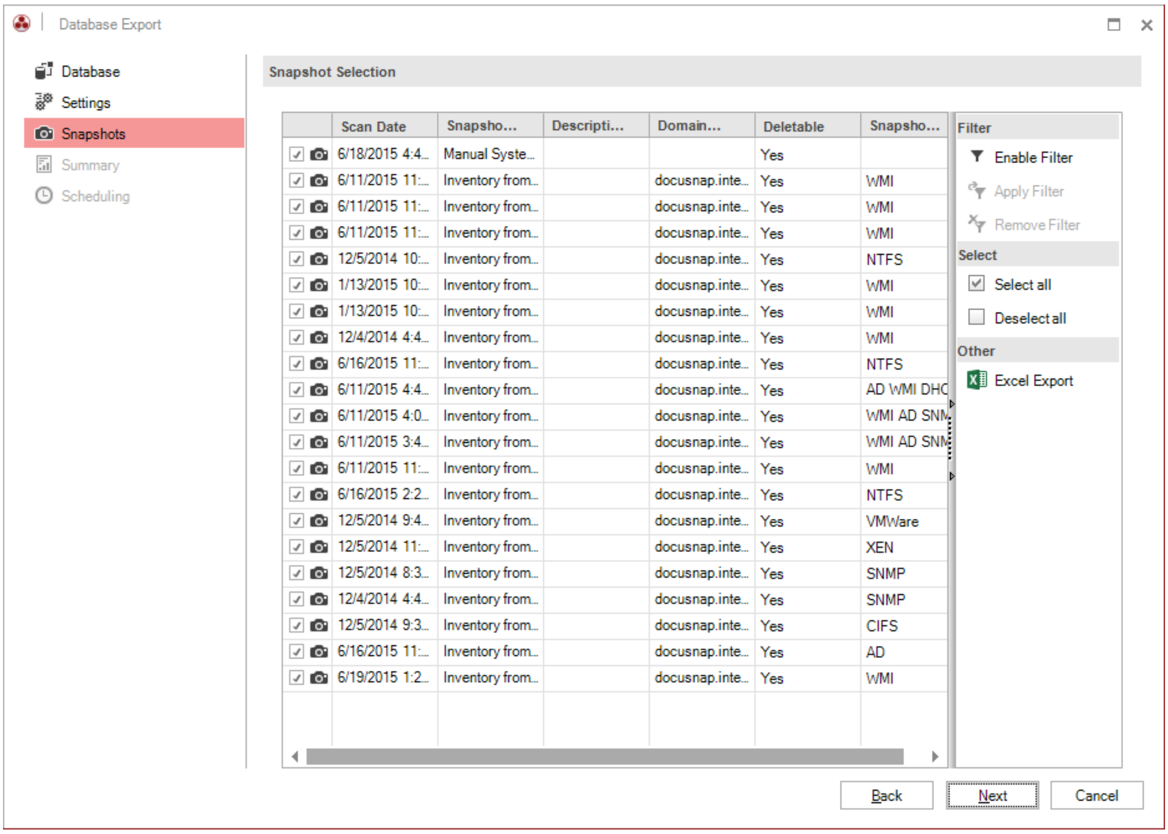
What is more, you can export any passwords that have been created. For this purpose, an encryption file is required. Click the ... icon and select the appropriate file. Its name will then be displayed in the *Export Encryption File* field.

If you want to exclude certain source database modules from the export, clear the checkmark for those which are not to be exported. If, for example, only the Windows checkbox is enabled, nothing but the workstation and server data will be exported. In addition, only snapshots containing data for the selected modules will be displayed in the next step.

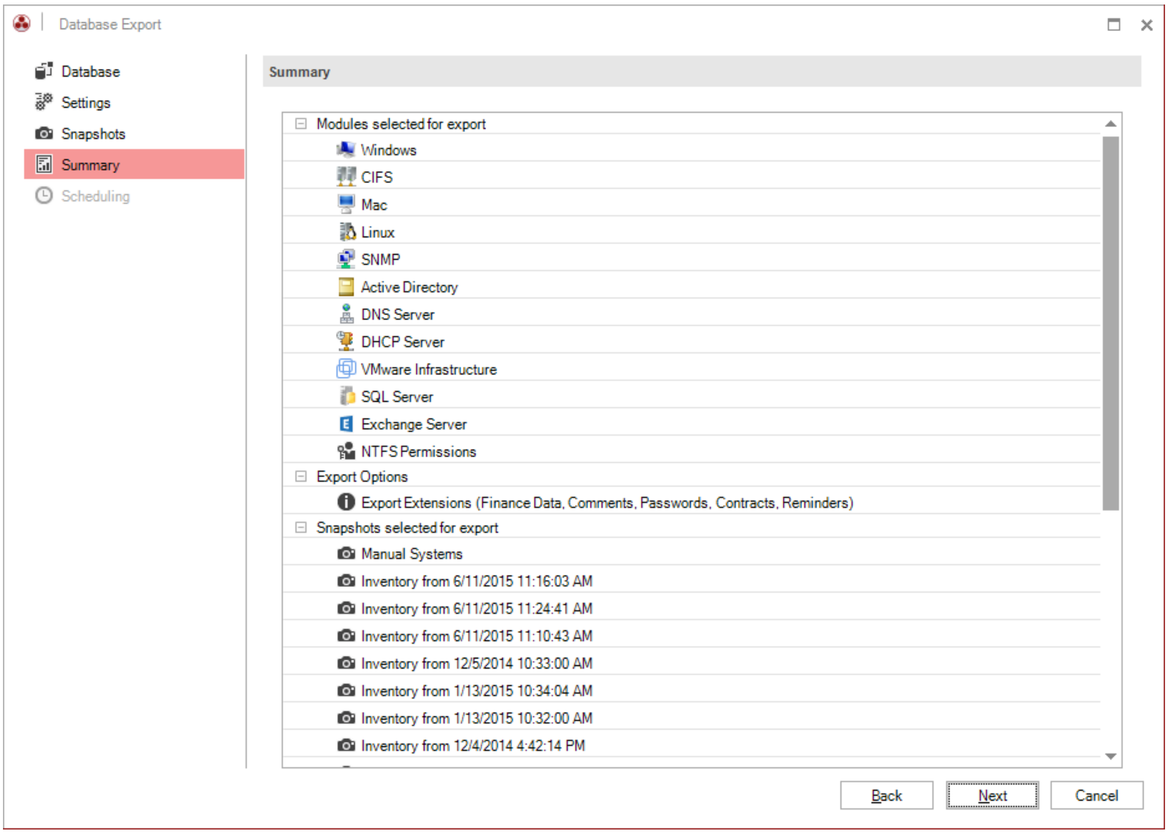


Here, a list of snapshots from the selected source database is displayed. To find snapshots more quickly, you can either name them when doing the inventory scan, or you can assign a name to them in the Manage Snapshots dialog. To the right of the snapshot list, a filter is available for easier selection of individual snapshots.

If the number of archives has been set to 4 in the Options dialog and the source database contains, for example, seven snapshots with WMI data, the oldest three will not be imported.



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.



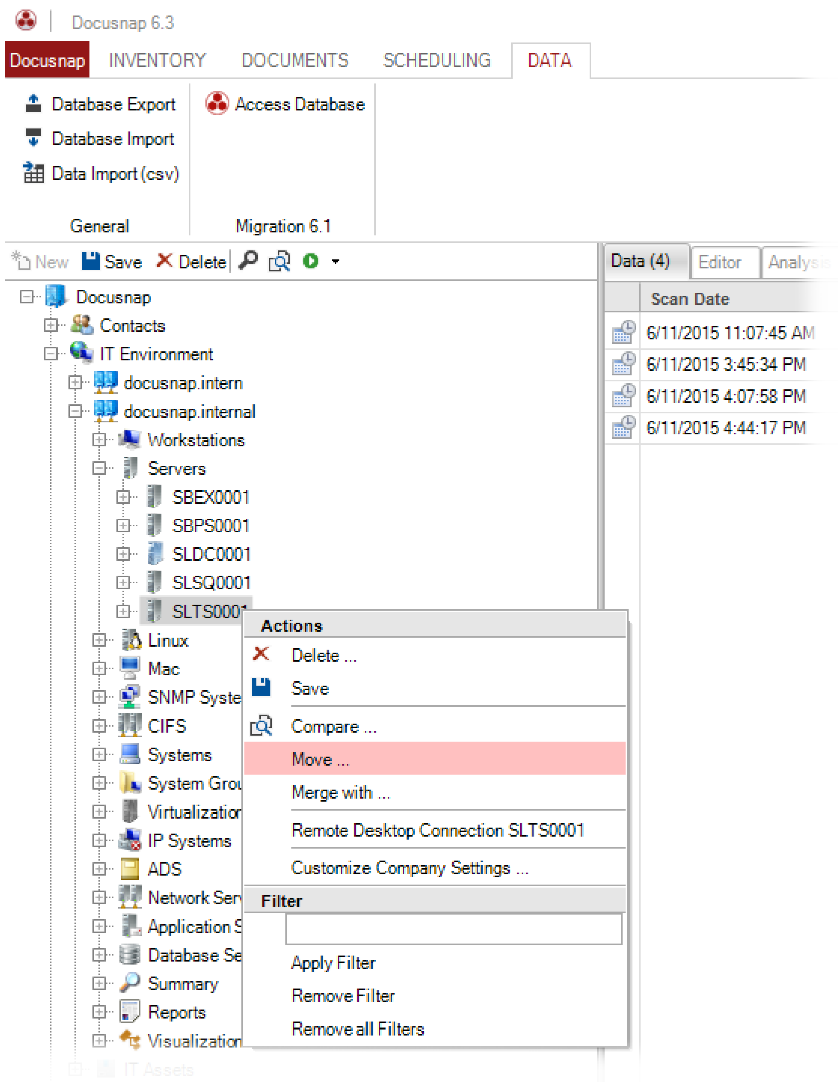
Through Scheduling, you can specify that the Data Export routine will start automatically at a later point in time. In the *Scheduling* step, you can define whether the export will be a one-time or a recurring event. Please note, however, that this feature can only be used if the Docusnap Server is installed on a system in the network. If the data export is scheduled, the schedule is saved by clicking on the *Finish* button and the wizard closes. If the checkbox *Schedule Database Export* was not activated, click the *Start* button to start the export process.

During the database export, its status will be displayed. To abort the export process, click the *Cancel* button. The data that has been exported up to that moment will be retained in the target database. Finally, the Report page will be displayed.

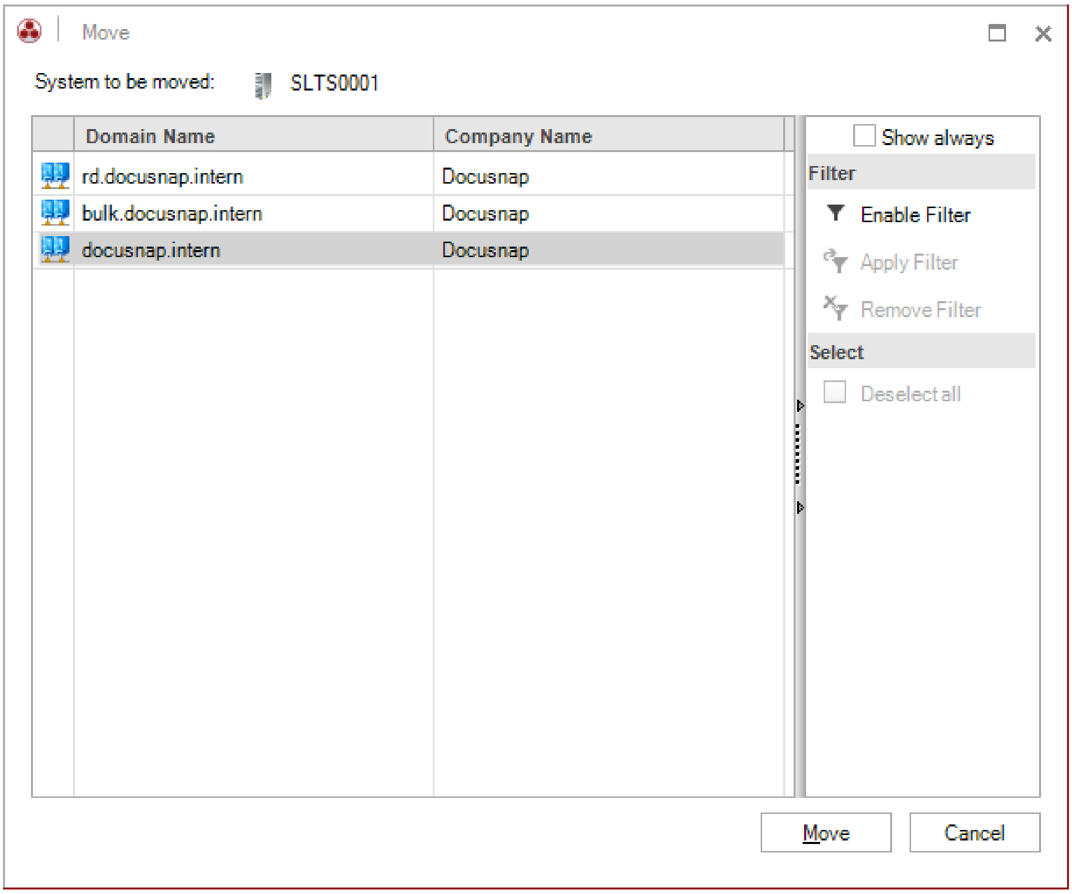
17.8 Move Systems

In Docusnap, you can move an inventoried system from one domain to another domain in the same or in a different company. Thereby the inventory data associated with a system that was moved to another domain, can also be moved in Docusnap. When you move a system, all related data is moved with it. The data of the system you moved will also be displayed in the License Management and Permission Analysis for the domain the system has been moved to. You can move inventoried Windows, Linux, Mac and SNMP systems.

To move a system, right-click it in the *Inventory* tree view and select *Move* from the context menu.



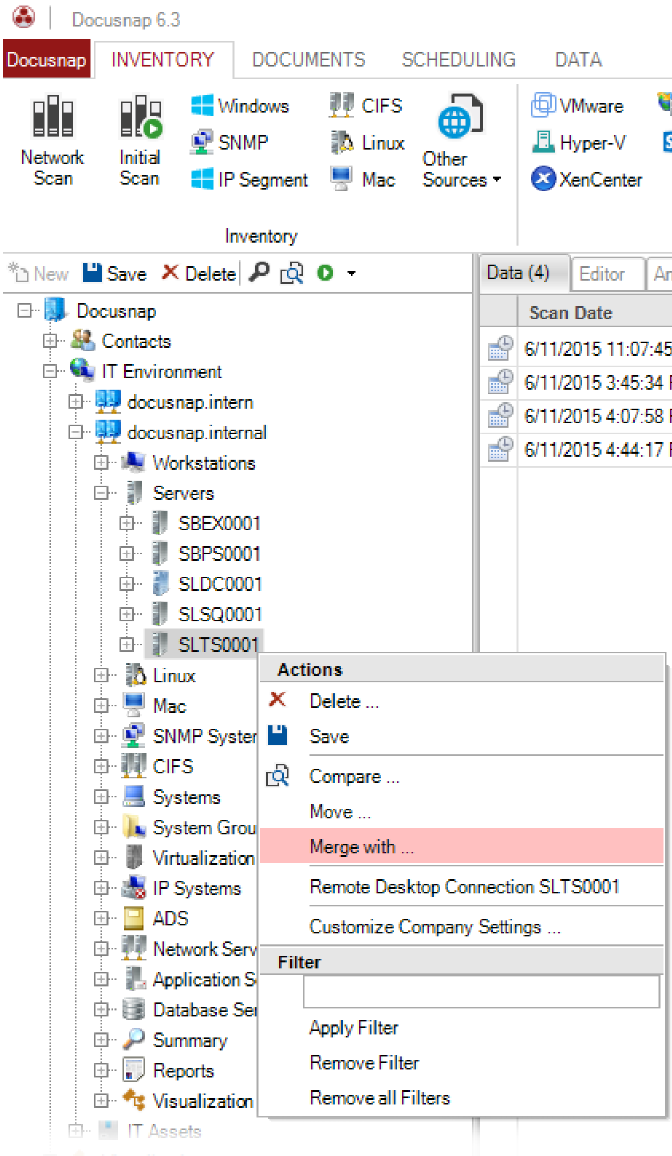
In the *Move* dialog, select the company and domain where you want to move the selected system. The system will be moved by when you click the *Move* button.


Move
System to be moved:
SLTS0001
Domain Name
Company Name
rd.docusnap.intern
Docusnap
bulk.docusnap.intern
Docusnap
docusnap.intern
Docusnap
Show always
Filter
Enable Filter
Apply Filter
Remove Filter
Select
Deselect all
Move
Cancel

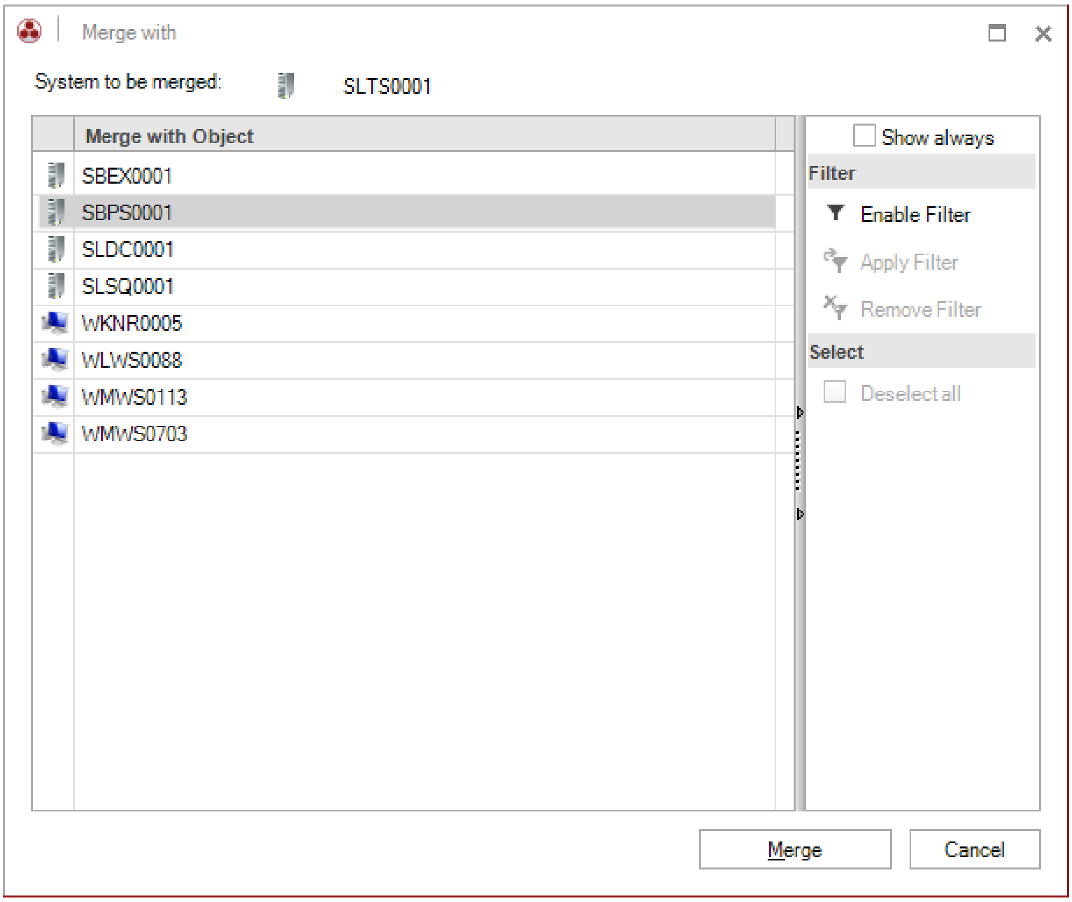
17.9 Merge Systems

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.



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.



Part XVII

18 Advanced Topics

Management Tools

Using the Management Tools feature, you can embed external programs into Docusnap or start them from there.

Report Differences

List of custom user reports in the report repository.

Notifications

Using the Notifications feature, Docusnap enables you to automatically send e-mail messages to users. These notifications are based on database queries. This way, it is possible to send warnings, for example, in case a contract is expiring.

Report Automation

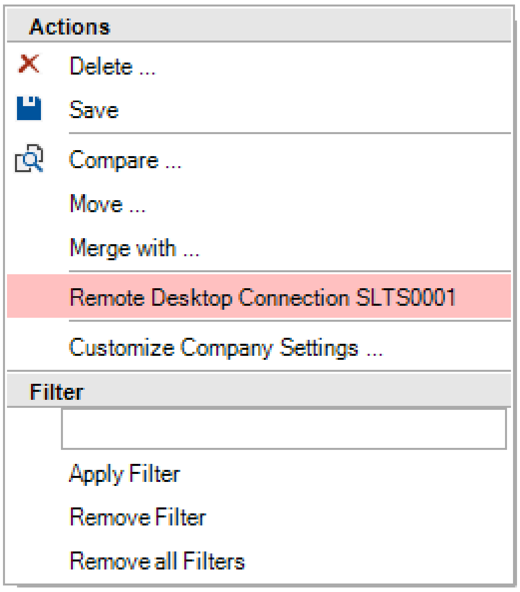
Using the automated reporting feature in Docusnap, you can schedule the automatic creation of reports.

18.1 Management Tools

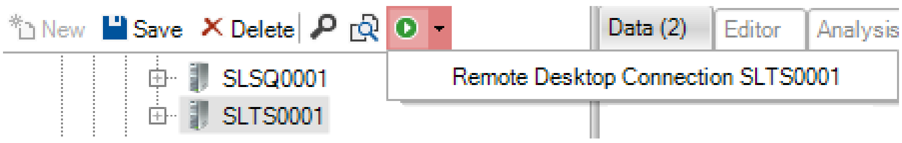
Using the Management Tools feature, you can embed external programs into Docusnap or start them from there. It is possible to specify additional parameters to be used when starting the program.

During the Docusnap installation process, the Remote Desktop Connection has already been created. When you create the management tools you can define for which host types they should be available.

The management tools are available from the context menu of items located in the tree at levels below the Workstations or Servers nodes.



The management tools can be started either from the context menu or using the button.



To define the *Management Tools* open the Docusnap Management.

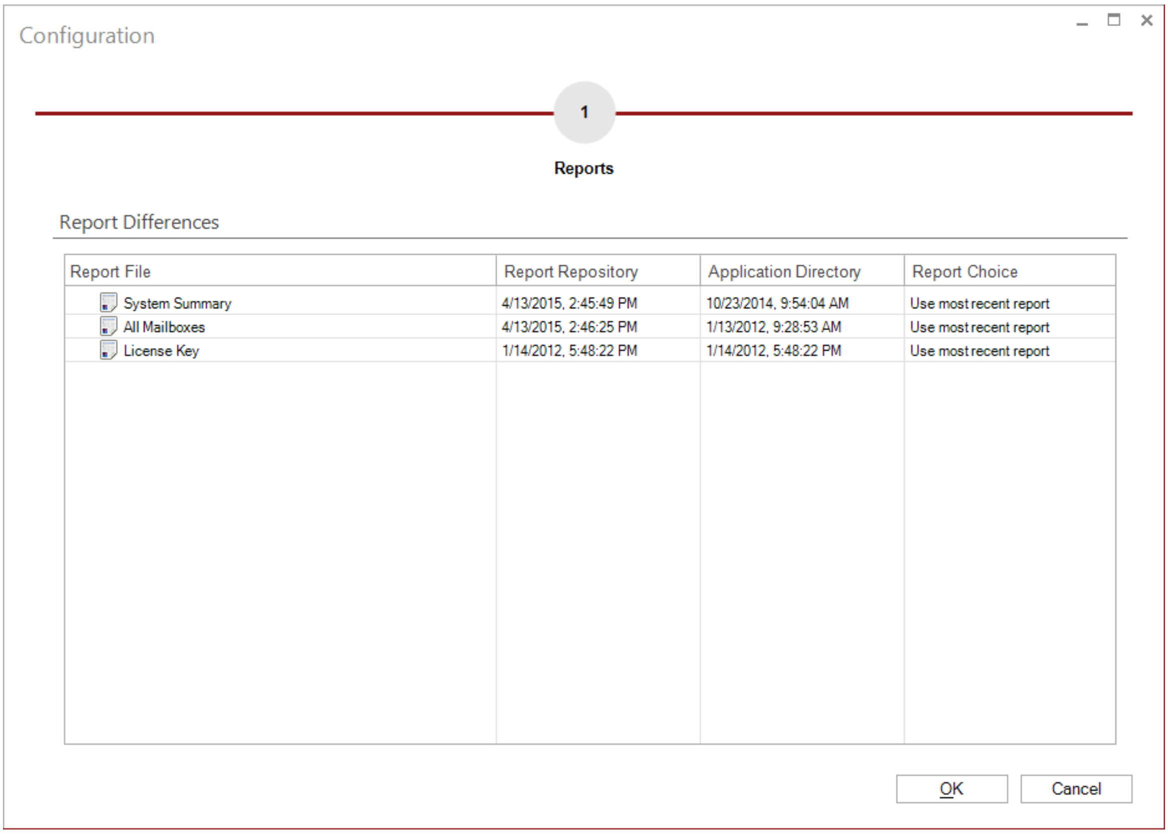
18.2 Report Differences

The reports supplied by Docusnap are stored in the program directory. When you start Docusnap for the first time, you will be prompted to specify the system paths for *Local Settings* and *Team Settings*. These paths can be changed later in the Options dialog. If a Team Settings path has been specified, it takes precedence, otherwise, the local path will be used.

User-adapted or newly created reports are subsequently stored in the report repository.

The *Report Differences* dialog will compare the report versions from the program directory and the report repository. Here all reports are listed for which there is a system version and a customer version. In addition it is specified which version is used. For each report can be defined, if always the latest report, the customer report or the system report should be used. Changes can be made in the *Manage Reports* tab of the *Docusnap Management*.

If new or updated reports have been downloaded during an update, they will be saved to the program directory.



18.3 Notifications

With this feature, you can have Docusnap automatically send an E-Mail when a license becomes invalid or an agreement expires on that day. To use the Notifications feature, the Docusnap Server component must be configured.

To define and transmit notifications, the *Define Notifications* dialog and the *Notification* wizard are required.

Define Notifications

Use the *Define Notifications* dialog to define the query statements for your notification. These statements determine which information will be sent in each e-mail and which criteria will trigger the transmission of a notification e-mail.

Notifications

Use the Notifications wizard to configure the intervals for checking the criteria.

18.3.1 Define Notifications

Click the *Define Notification* button in the *Scheduling* ribbon to open the *Define Notification* dialog.

In the Define Notification dialog, you can set the name and the statement for the notification. An e-mail will only be sent if the SQL statement returns a result set. If the query returns the same result as the previous query, nothing will be sent.

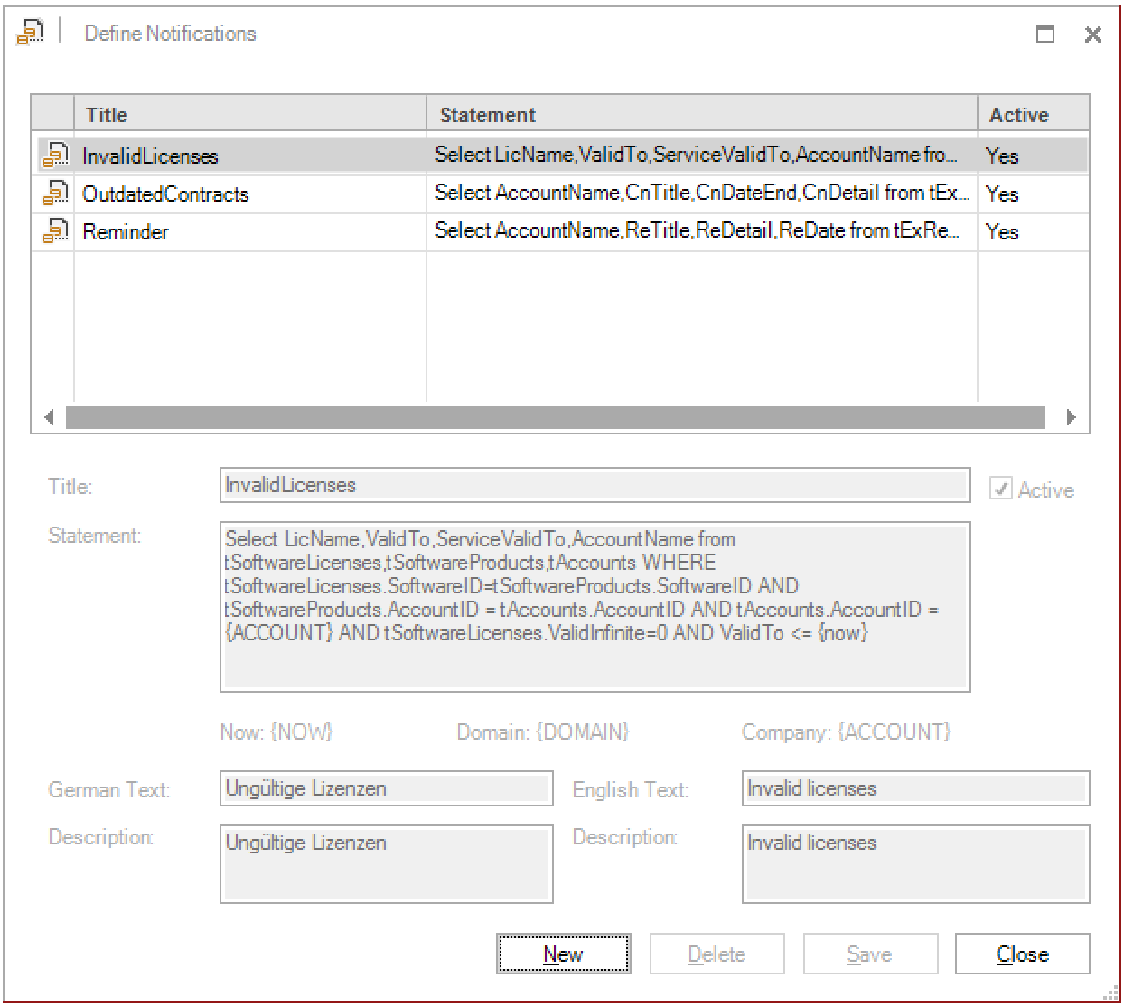
Some predefined notification types provided with the Docusnap installation.

You can choose the notification title as desired. If you work with the English user interface, the text you enter in the *English Text* field will be displayed when you select the notification from the wizard. If Docusnap has been set to German, the content from the *German Text* field will be used. You can optionally specify a description for each notification you define.

If the selected SQL statement returns at least one result row, an e-mail will be sent. The results will be submitted in an Excel file attached to the e-mail. All columns used in the SQL statement will be reflected in the Excel file. The SQL statement may use all tables available from the selected database.

You can use the company {ACCOUNT}, the domain {DOMAIN} and the current date {NOW} as variables in the SQL statement.

If you disable the *Active* checkbox, this definition will not be available for selection from the notification wizard.



18.3.2 Notifications

Click the *Notification* button in the *Scheduling* ribbon to open the *Notification* wizard.

This wizard allows you to set the interval for criteria checks and to specify the intended e-mail recipients.

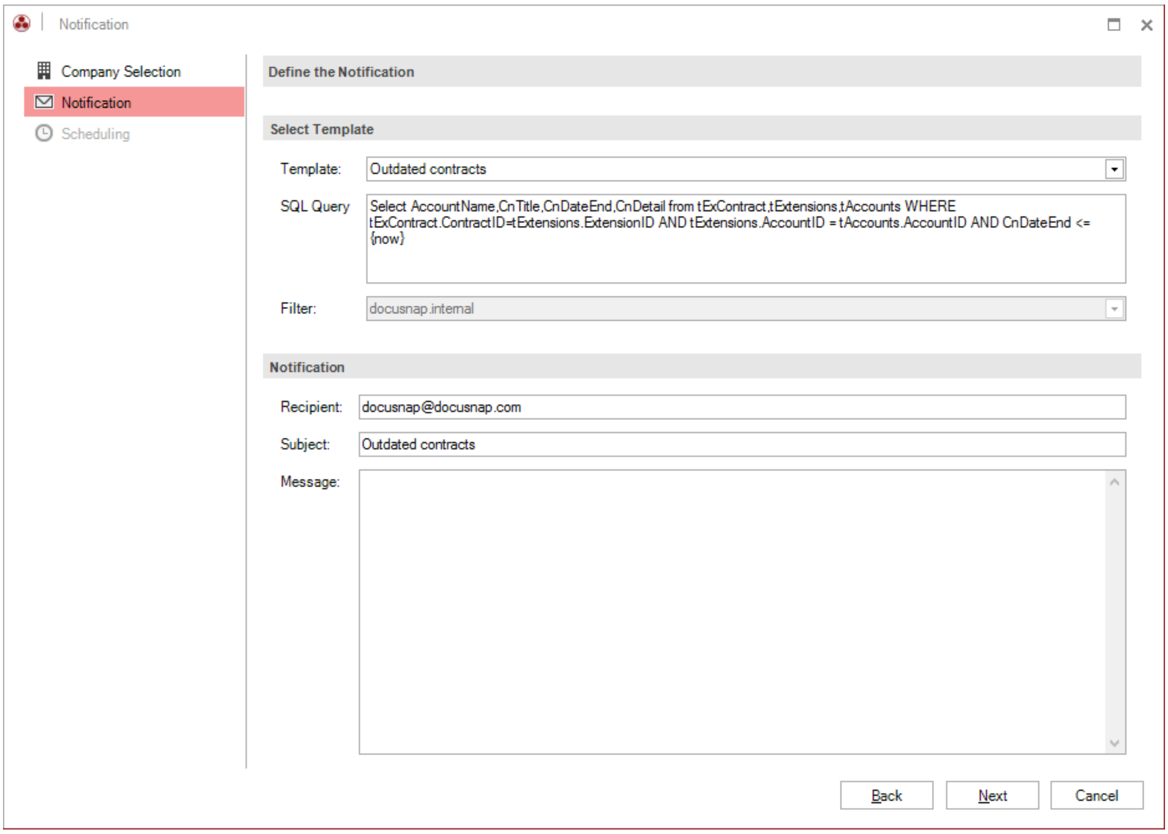
The first step is to select the company. By selecting the company, you determine which company will be used for the SQL Statement.

Here, you define the notification to be sent. The *Template* drop-down list offers some predefined notification types for selection. In the *SQL Query* field, you can see which SQL statement will be used for the selected notification type. If the {Domain} variable is part of the statement, you must select a filter. A domain must be selected for the {Domain} variable. Only domains for the in the first step selected company will be displayed as filters.

Specify the e-mail address of the intended recipient in the *Recipient* field and the subject of the notification in the *Subject* field.

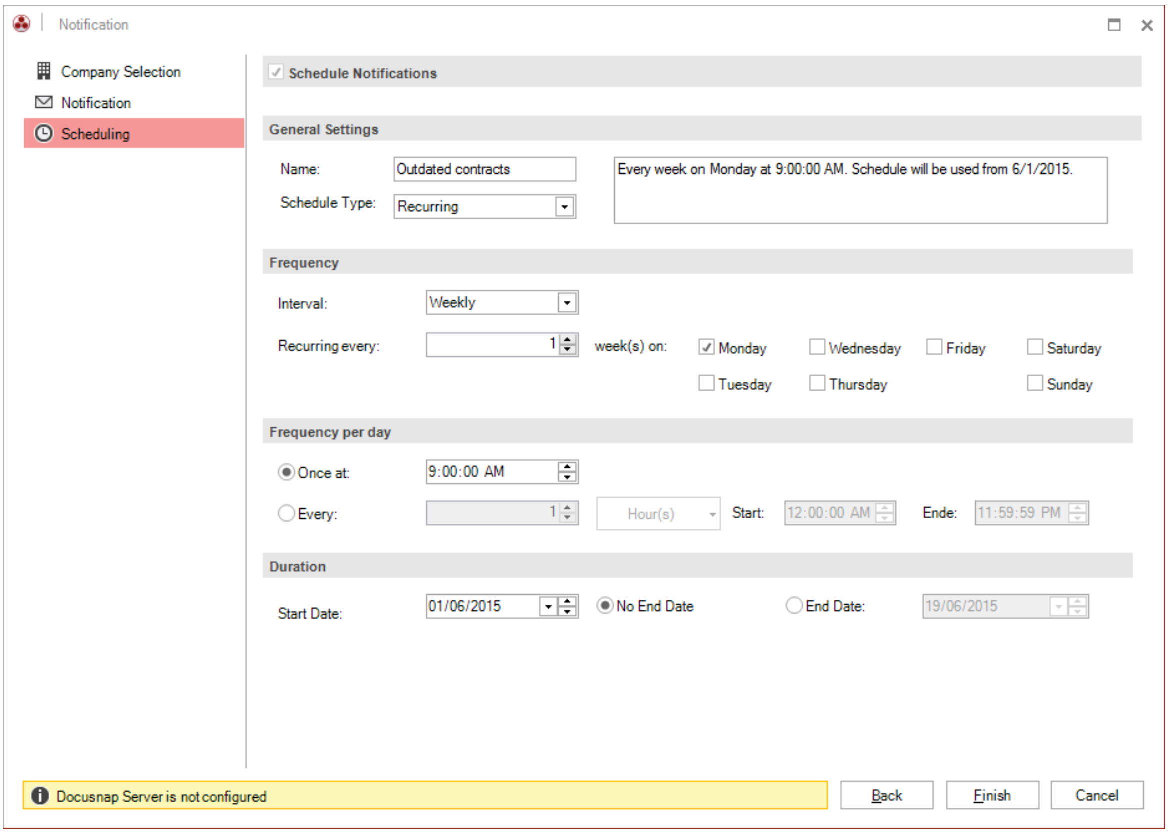
Then, enter the body text of the notification in the *Message* field.

The results from the SQL statement will be attached to the e-mail as an Excel file. If the execution of the statement does not return a result set, no e-mail will be sent. This could be the case, for example, if the program checks for invalid licenses and none of the license expiration dates is earlier than or matches the current date.



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.



18.4 Report Scheduling

With Docusnap, you can schedule the creation of reports and have them generated automatically at a later point in time.

The scheduled report will be created in the selected format and saved in the Docusnap Server documentation path. The following folder structure will be created in the target directory:

- Company\Reports
- Company\Domain\Reports

Standard reports that are created via the server Docusnap are loaded from the program directory and do not have to be treated specially. To generate user-customized or newly created reports with the Docusnap Server, they must be provided in either the Team Settings path of the Local Settings path of the Docusnap Servers.

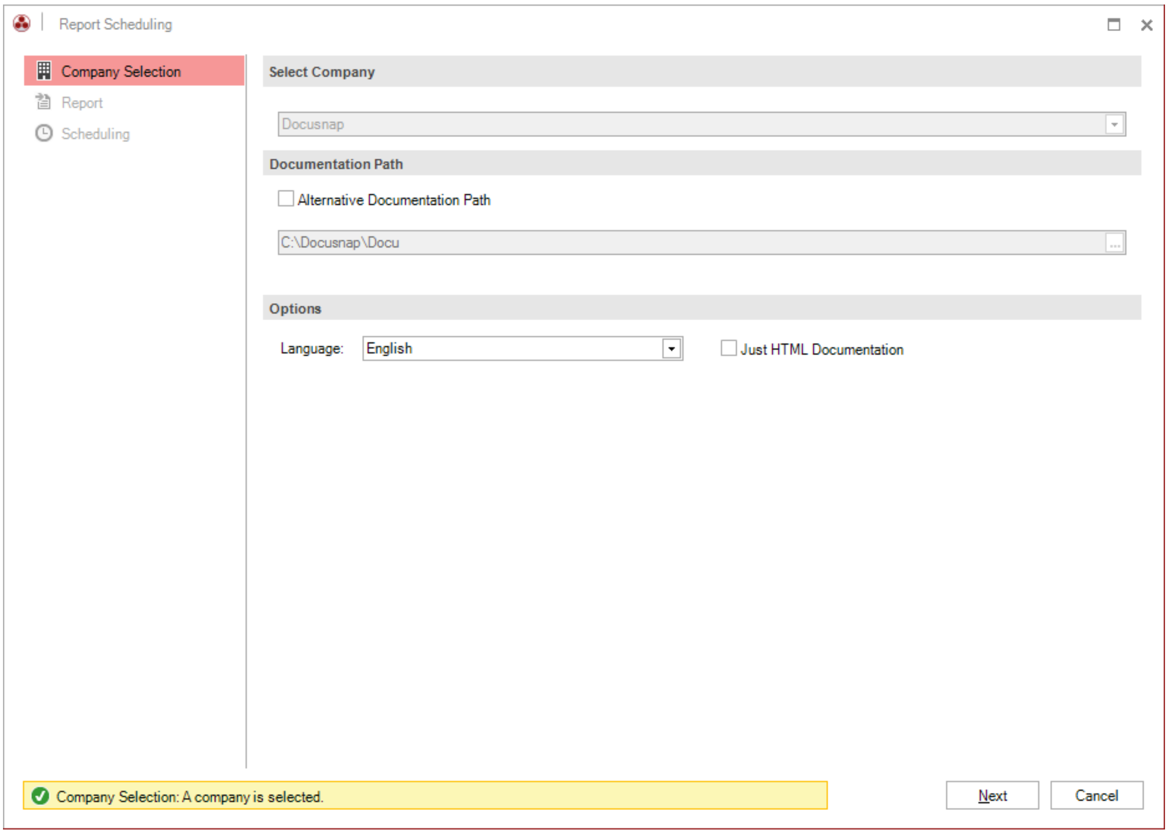
To start the report scheduling wizard, generate the corresponding report. Then, click the *Schedule as Job* button on the *Reporting* ribbon to start the wizard.

For Permission Analysis reports (*Users (Resources)*, *Directory (Resources)*) the wizard will be started by clicking the *Schedule* button in the corresponding dialog.

The settings you specify for your report will be saved and applied when the report is executed later.

In the first step, you can select the language of your report. All reports are available in English and German. These reports have the same file names and are distinguished only by their prefix, "EN_" or "DE_". If you change the language while creating the job, the report will be created in the newly selected language. So when creating user-defined reports, make sure to provide them in both languages.

In case you do not create the report using the predefined directory (documentation path), specify an alternative documentation path. By default, the documentation path defined for the Docusnap Server will be used. If you specify an *alternative documentation path*, that path will be used.

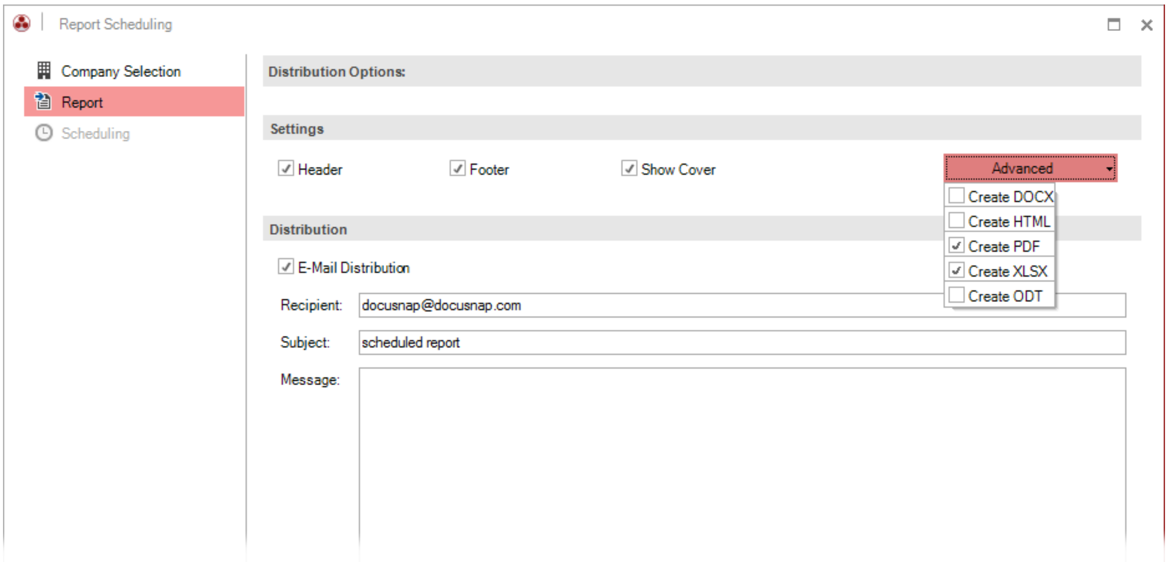


In the next step, you can select the desired report format.

The following formats are available: docx, xlsx, html, odt and pdf.

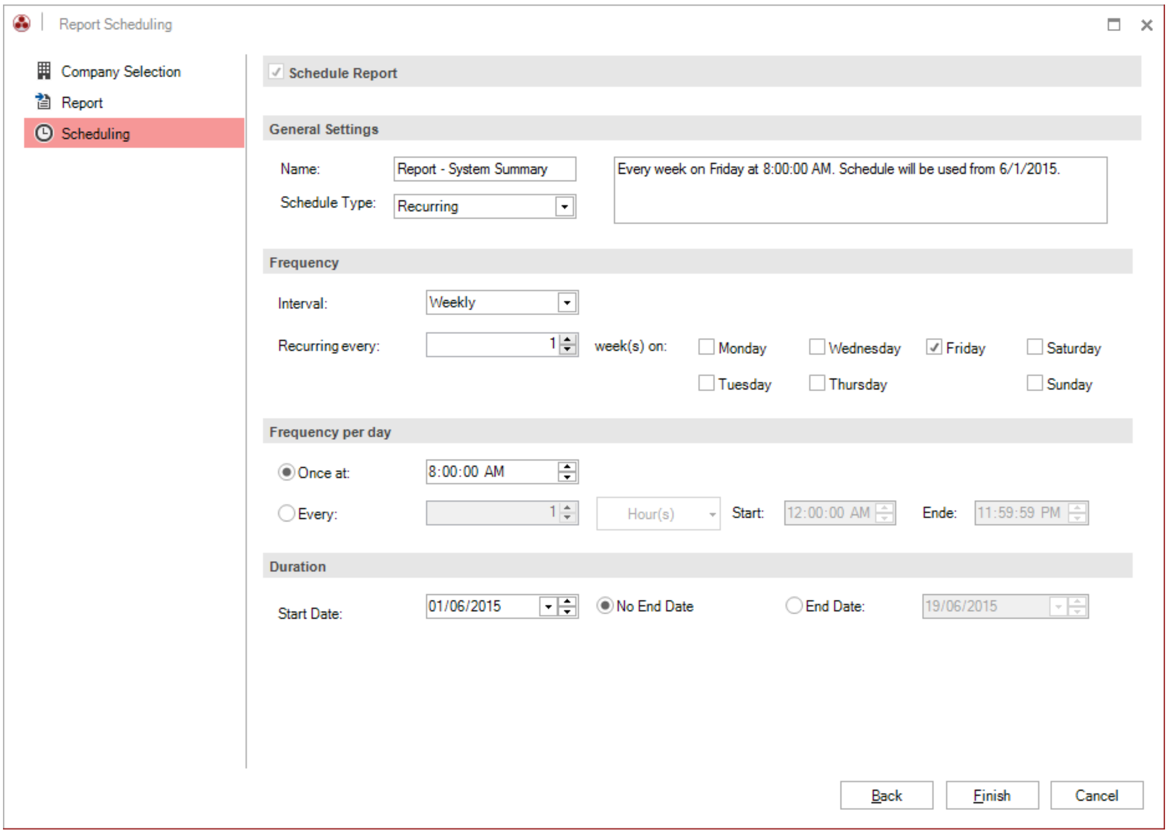
Additionally, you can specify here whether to include a cover page, a header and a footer in your report. If you do not make any changes, the settings from the *Layout (CI)* dialog will be used.

If you tick the *E-Mail Distribution* checkbox, the report will be sent to the e-mail address(es) specified below. Even if *E-Mail Distribution* is enabled, the reports will always be saved to the *documentation path* specified.



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.



18.5 Options Configuration File

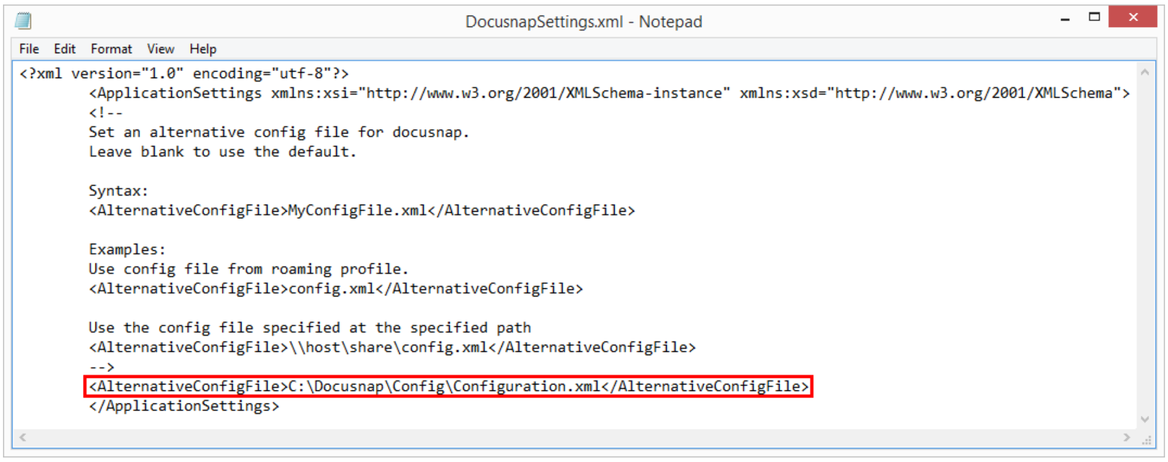
Settings you define in the *Options* dialog will be stored in a configuration file located on the computer where Docusnap is running. If multiple employees want to use the same settings when working in Docusnap, it is possible to start the program using a shared configuration file.

You can either directly append the corresponding parameter to the Docusnap.exe file or define it when starting Docusnap from the command line. The parameters are case-sensitive, i.e. they must be entered exactly as shown here: *-SelectConfig* and *-UseConfig*.

When Docusnap is update the Docusnap icon on the desktop is deleted and created again. Thereby the parameters *-SelectConfig* and *-UseConfig* are deleted.
The path can be set permanently in the file DocusnapSettings.xml, so the path does not have to be specified again after every Docusnap Update.

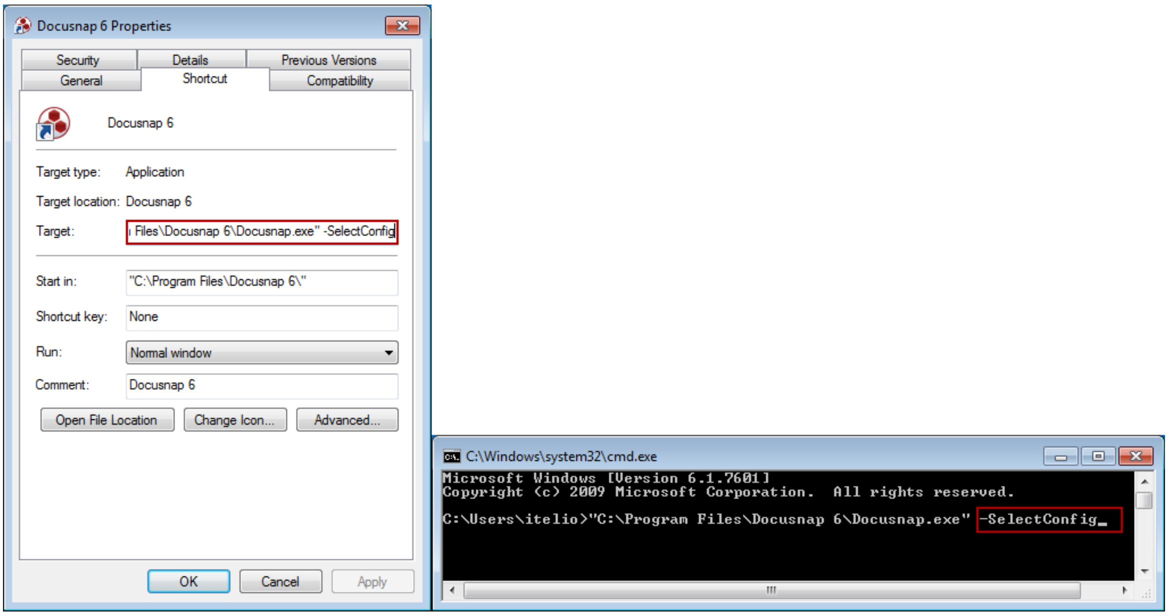
Configuration File

When installing Docusnap the file DocusnapSettings.xml is created in the directory "C:\ProgramData\Docusnap". In this file the tag <AlternativeConfigFile> specifies the path where the desired configuration file is saved. When updating Docusnap this file is not changed, as a result Docusnap always uses the defined configuration file. If no path is specified in this file the default configuration file is used.

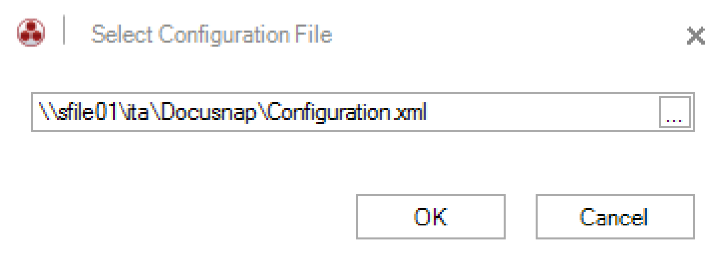

DocusnapSettings.xml - Notepad
File Edit Format View Help

```
<?xml version="1.0" encoding="utf-8"?>
        <ApplicationSettings xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance" xmlns:xsd="http://www.w3.org/2001/XMLSchema">
        <!--
        Set an alternative config file for docusnap.
        Leave blank to use the default.

        Syntax:
        <AlternativeConfigFile>MyConfigFile.xml</AlternativeConfigFile>

        Examples:
        Use config file from roaming profile.
        <AlternativeConfigFile>config.xml</AlternativeConfigFile>

        Use the config file specified at the specified path
        <AlternativeConfigFile>\\host\share\config.xml</AlternativeConfigFile>
        -->
        <AlternativeConfigFile>C:\Docusnap\Config\Configuration.xml</AlternativeConfigFile>
        </ApplicationSettings>
```

-SelectConfig

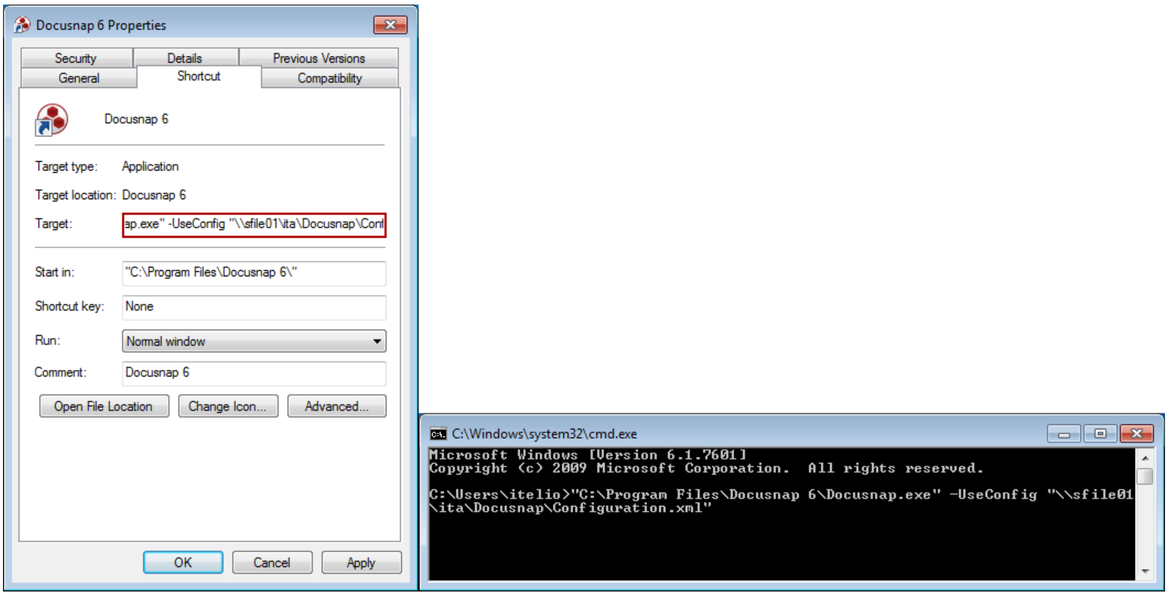


When you use the *-SelectConfig* parameter, a dialog appears before the Docusnap startup which allows you to select the path to the configuration file. Then, Docusnap will be started using the settings from the selected configuration file.



-UseConfig

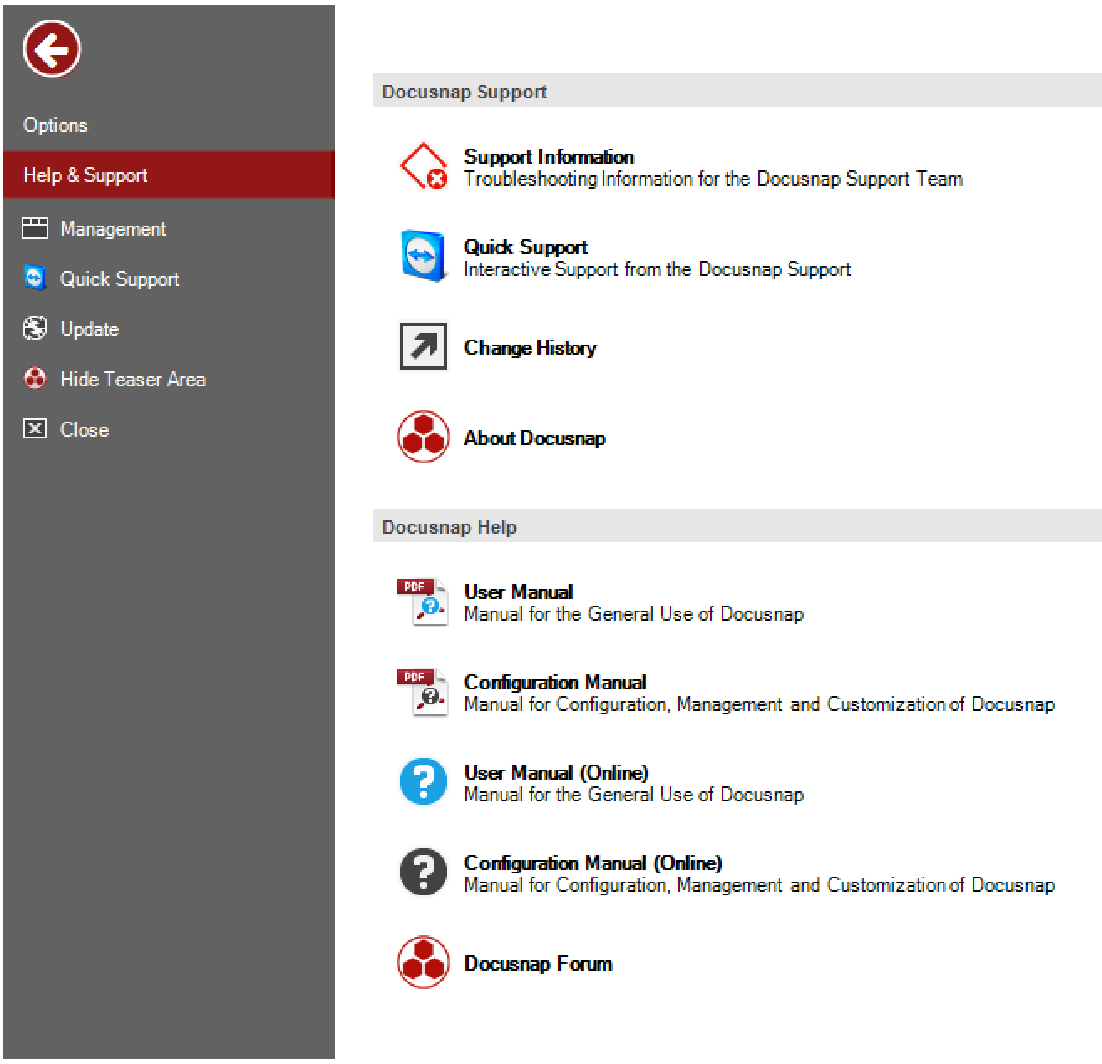
The *-UseConfig* parameter allows you to specify a particular configuration file to be used each time Docusnap is started. When using this parameter, you specify the path to the configuration file.



Part XIX

19 Support & Help

The Docusnap Menu in Help & Support includes all features provided by the Docusnap Support Team to assist you with problems or questions.



Update

To download an updated Docusnap version via an Internet connection, simply click the *Update* button.

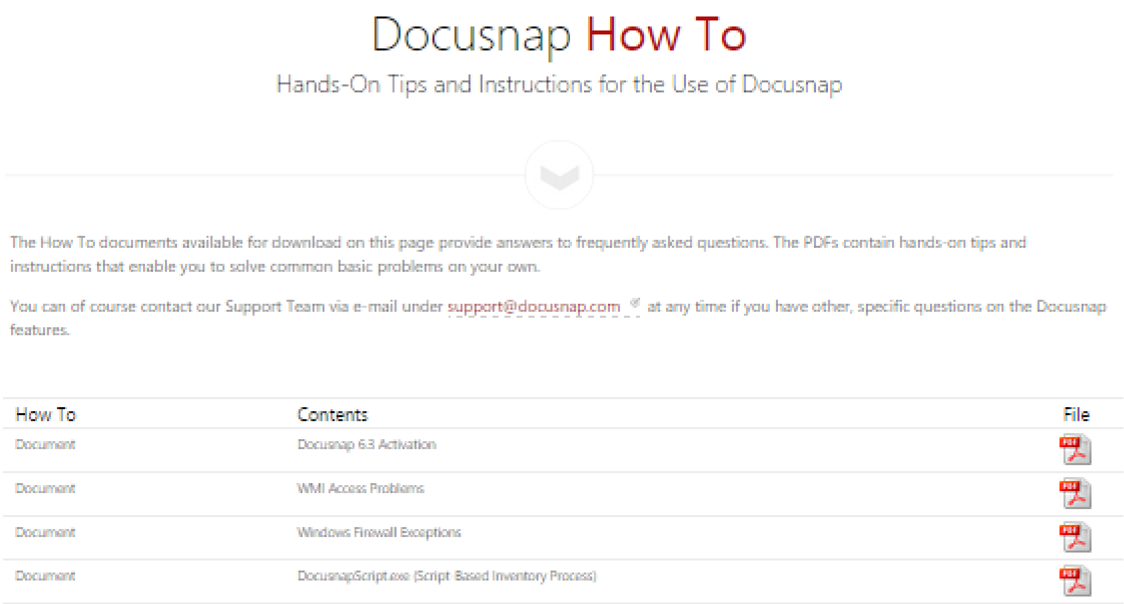
Support

This group provides features for generating log files and displaying general information about Docusnap. A Live Support feature is also available.

Manual / Online Help

This group provides access the manuals and help systems both for the use of Docusnap and the administration.

In addition, more how-to documents on the Docusnap website can be used for help. http://www.docusnap.com/en/support/how-to



Docusnap How To

Hands-On Tips and Instructions for the Use of Docusnap

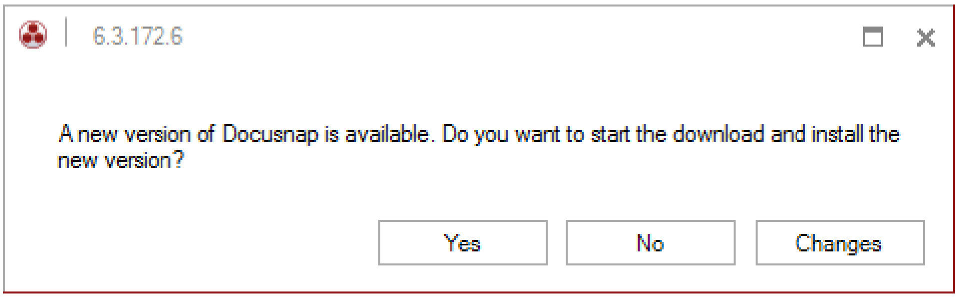
The How To documents available for download on this page provide answers to frequently asked questions. The PDFs contain hands-on tips and instructions that enable you to solve common basic problems on your own.

You can of course contact our Support Team via e-mail under support@docusnap.com at any time if you have other, specific questions on the Docusnap features.

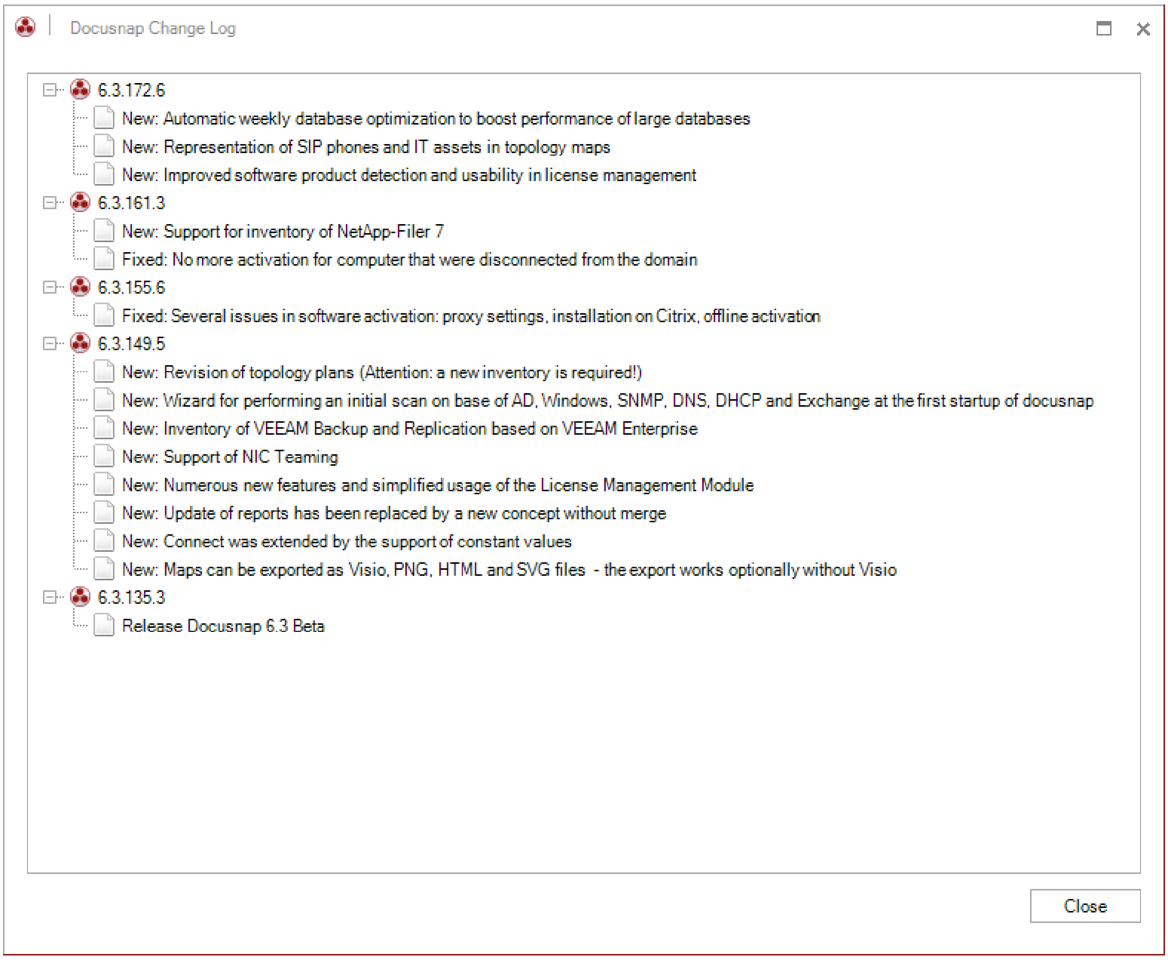
How To	Contents	File
Document	Docusnap 6.3 Activation	
Document	WMI Access Problems	
Document	Windows Firewall Exceptions	
Document	DocusnapScript.exe (Script-Based Inventory Process)	

19.1 Update

The *Docusnap Update* allows you to obtain updated versions and keep your Docusnap installation up to date. If a new Docusnap version is available, you will be prompted for an update upon startup, but you can also click the *Update* button to open the update dialog.



To see a list of the new features and/or bugfixes, click the *Change History* button.



When you confirm to start the update process, Docusnap downloads the update set. The installation automatically starts once the download has completed successfully. Upon completion of the installation, you can start the new Docusnap version.

If Docusnap has been installed on multiple workstations, the update must be performed for all of the installations.

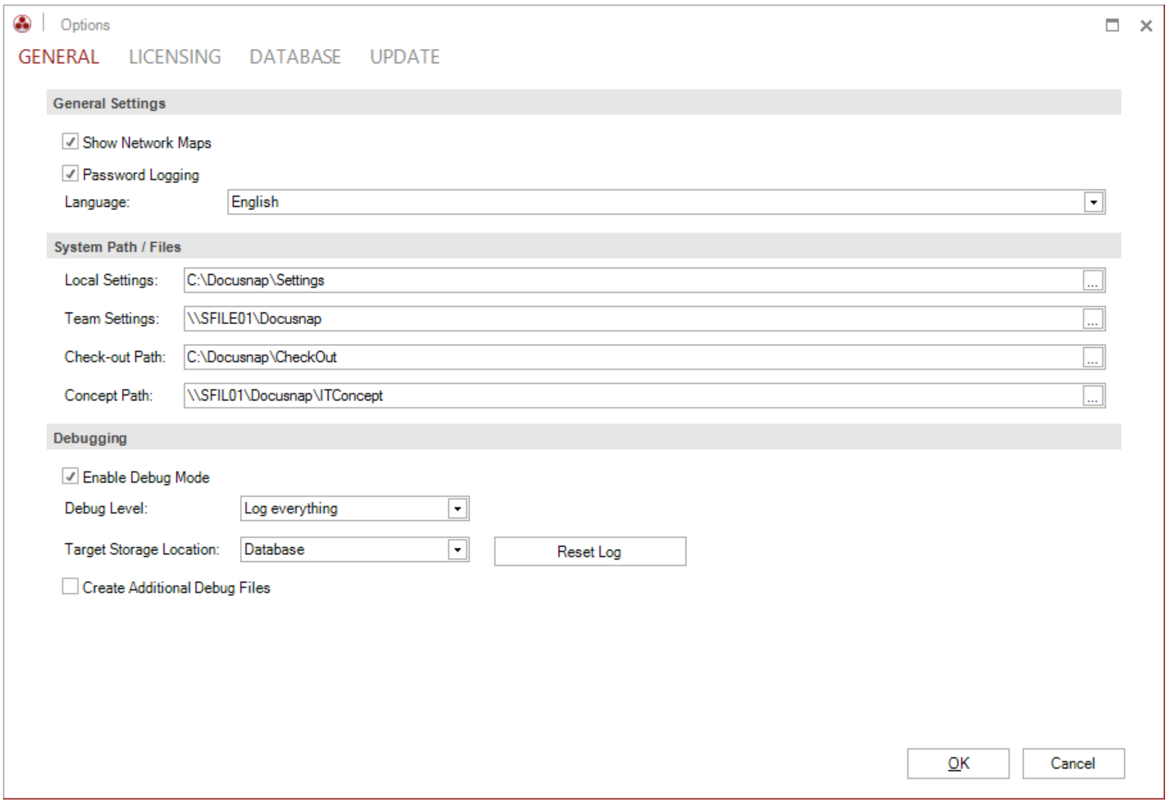
19.2 Problem Resolution

Enabling Debug Mode

If errors occur while using Docusnap, you can trace them. Check the *Enable Debug Mode* option in the Options dialog to log errors in the database. You have the option to either log all program events or exceptions only.

By clicking the *Support Information* button, you can open a dialog where you can save the logged data to a file and send it to the Docusnap Support team.

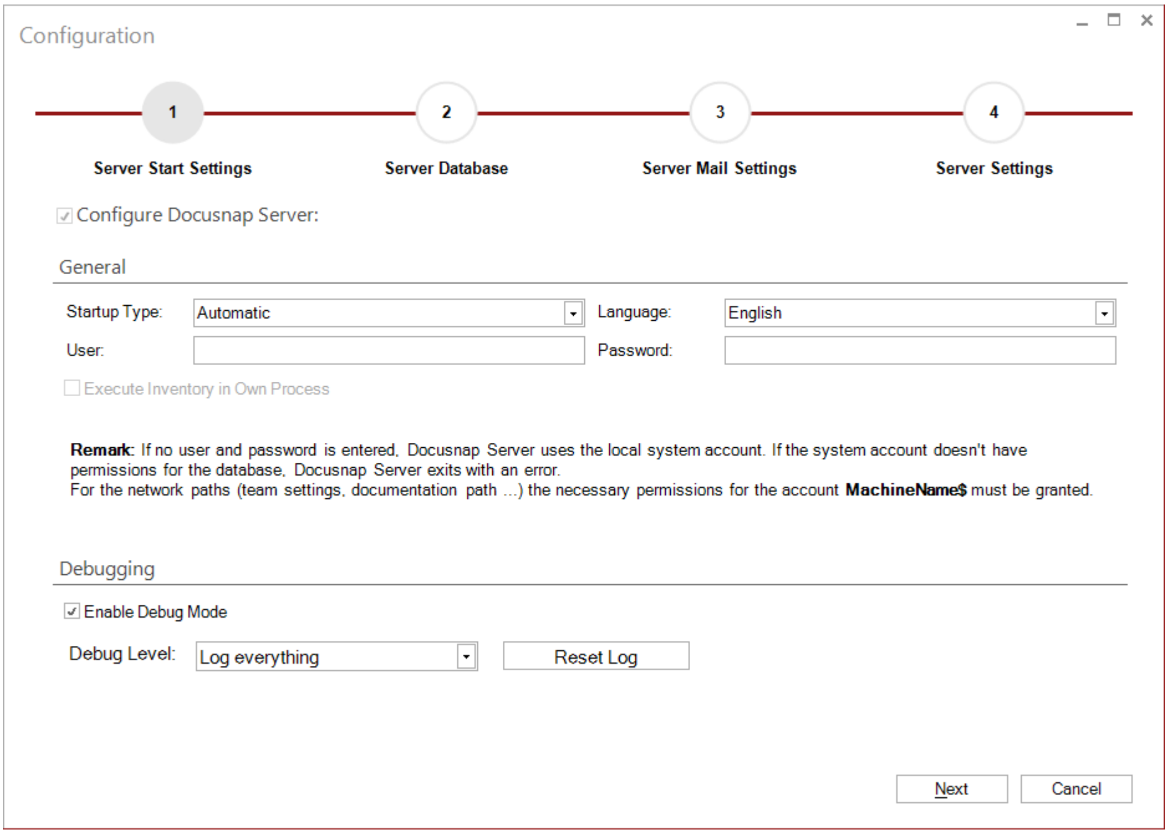
To delete all existing debug information from the database, click the *Reset Log* button on the General page of the Options dialog.



Enabling the Debug Mode for Docusnap Server

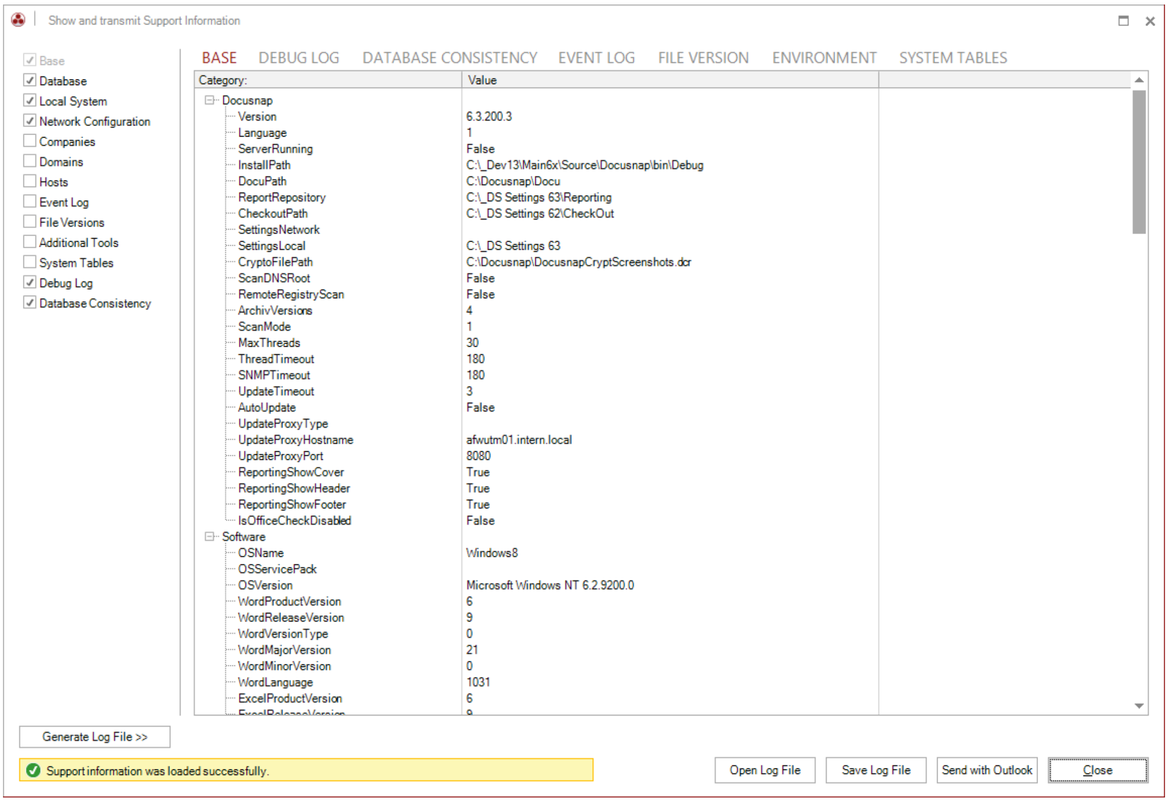
The Docusnap Server is required to schedule network scans, documentation creation processes, notifications, etc. to be performed automatically at a later time. To be able to analyze errors, the debug mode for the Docusnap Server component must be enabled.

You can do so in the *Configuration* wizard for the Docusnap Server. To set the desired level of debugging, you can select either *Log everything* or *Exceptions only* from the Debug Level dropdown list. The storage location is set to *Database*. Clicking the *Reset Log* button will delete all existing error information from the database.



Communicating Support Information to the Support Team

The *Support Information* dialog, allows you to generate log files and send them to the Docusnap Support team.



- **Generate Log File:** Generates a log file according to the selected options.
- **Open Log File:** Displays the generated log file content.
- **Send with Outlook:** Opens 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.