

OVERVIEW

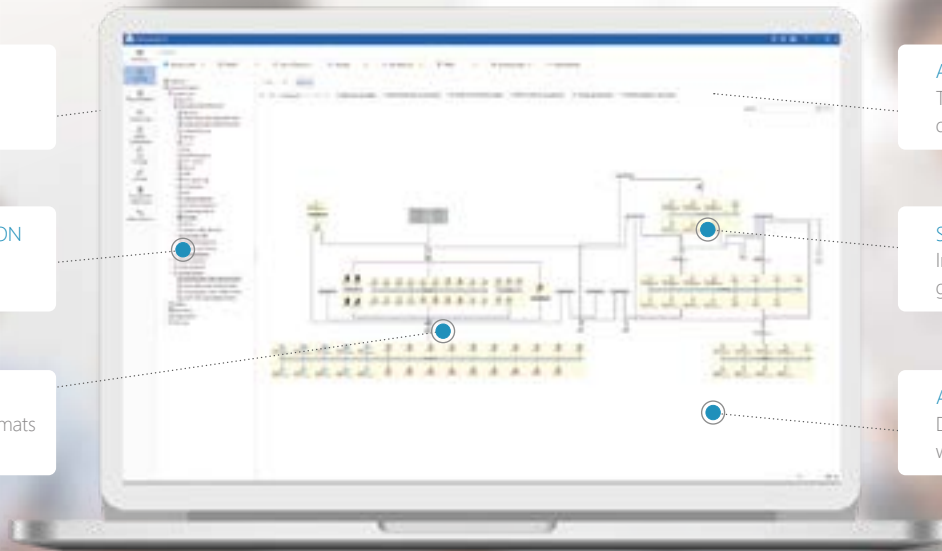
Clear and understandable structures

SINGLE POINT OF INFORMATION

Plans, reports, concepts, and much more in one place

FLEXIBLE

Export to all common office formats as well as PDF & HTML



AUTOMATED

Time-controlled inventory and document creation

SCALABLE AS REQUIRED

Inventory from single servers to group structures

ASSISTANT-SUPPORTED

Document the entire network with just a few clicks

Tips & recommendations for the

START WITH DOCUSNAP

Your DocuSnap implementation is about to start. To ensure that this is a successful start and that the creation of your network inventory and IT documentation with DocuSnap is not a one-day wonder, we have summarized the following tips and recommendations.

1. Preparations in the team

1.1. Responsibilities

First, define who will be responsible for the DocuSnap software in the future. Experience shows that the implementation and regular use of DocuSnap is successful for those who put the „DocuSnap head“ on one or more employees right from the start. Determine who will assume organizational responsibility. This could be the IT manager, for example, who then takes care of issues such as renewing the DocuSnap subscription/service contract etc. and regularly reviews the targets that have been set. There also needs to be a person with technical responsibility - e.g. the IT admin, who is responsible for technical implementation and data maintenance.

1.2 User administration

Do not disregard whether user administration will be necessary. In DocuSnap, you can set up a granular user assignment via a user role concept. This ensures that, for example, the trainee cannot see any passwords stored in DocuSnap.

Link to our HowTo: [DocuSnap - User administration](#)

1.3 Relevant group of people

Think about who will benefit from the results obtained with DocuSnap and how you would like to inform them. Examples would be sending regular reports by email to the heads of the specialist departments, with the authorization assignments of their employees or reporting to the data protection officer.

2. Objective

2.1 Definition of objectives

Remind yourself what your specific pain points are with regard to your existing IT documentation and why you now want to optimize it with DocuSnap. You may have already set yourself a few goals or can now gradually define which requirements should be realized with DocuSnap.

3. Installation & configurations

3.1. Database selection

Since successful installation and configuration are the cornerstone and will be the common thread running through your further steps with DocuSnap, we recommend that you allow sufficient time (approx. one hour) for this and consider the following topics in advance:

A database system is required to store the data in DocuSnap. The Microsoft SQLServer Express LocalDB, Microsoft SQLServer Express (from version 2012) or a fully-fledged Microsoft SQLServer (from version 2012) can be used as the database system.

The Microsoft SQLServer Express LocalDB is only recommended for test purposes. If this is used, the DocuSnapServer service (time-controlled execution of tasks), the DocuSnap WebClient and the DocuSnapDiscoveryServices (decentralized inventory of remote locations) cannot be used.

Link to our video tutorial: [Installation - Video tutorials from DocuSnap experts](#)

Link to our HowTo: [DocuSnap - Installation and configuration](#)

3.2 Installation & configuration checklist

STEPS	STEPS	REQUIREMENTS & IMPLEMENTATION
1. DOCUSNAP-SERVER	Installation and configuration of the Docusnap server	<input type="checkbox"/> Windows 10 / Windows Server 2016 / Server 2019 <input type="checkbox"/> 4 to 8 GB RAM <input type="checkbox"/> 2 to 4 CPU cores <input type="checkbox"/> .NET Framework 4.8 or higher <input type="checkbox"/> 64 bit operating system architecture
2. DATABASE SERVER	Install and configure a database server or check the configuration of an existing server Important: The Docusnap database must be created using the Docusnap wizard!	<input type="checkbox"/> Database instance <input type="checkbox"/> Full text search <input type="checkbox"/> Authentication scheme (Windows / SQL) <input type="checkbox"/> Set up users and authorizations <input type="checkbox"/> Network configuration / remote access set up <input type="checkbox"/> Set up firewall shares
3. DOCUSNAP INSTALLATION	Installation of Docusnap	<input type="checkbox"/> Select installation directory <input type="checkbox"/> Database selection (use existing SQLServer) <input type="checkbox"/> Install NPCAP driver
4. DOCUSNAP CLIENT CONFIGURATION	Configuration of the Docusnap Client	<input type="checkbox"/> Perform activation <input type="checkbox"/> Establish database connection <input type="checkbox"/> Store system paths <input type="checkbox"/> Create encryption file <input type="checkbox"/> Create central configuration file
5. DOCUSNAP SERVER CONFIGURATION	Configuration of the Docusnap Server service	<input type="checkbox"/> Set up execution of the service <input type="checkbox"/> Establish database connection <input type="checkbox"/> Store encryption file <input type="checkbox"/> Enter SMTP server <input type="checkbox"/> Set up server API <input type="checkbox"/> Store system paths

4.4. Commissioning

4.1 Preparation

Before implementing DocuSnap, it is important to be familiar with the network conditions. It may be manageable for a single domain. However, your company may have multiple locations that you want to capture in DocuSnap. It is therefore helpful to know the network structure to be inventoried in order to ensure a smooth and complete inventory.

DocuSnap is your „data collector“ in the network. Collecting data regularly and recurrently is the basis for preparing the information obtained about your systems as reports, network plans or IT concepts. Only if your inventory scans are carried out completely and regularly will your data be up-to-date and your IT documentation reliable.

4.2. Inventory - choosing the right scan assistants

Inventory comes before documentation! Before you get down to work and collect your first data with DocuSnap, get an overview of the various scan assistants. This ensures that you receive exactly the information you need for your evaluations. For example, use the IP-Scan to inventory all active network devices to complete the inventory and discover unknown devices or the Windows AD-Scan to inventory domain-integrated Windows systems with software, hardware, etc. We have summarized all the technical requirements for the inventories, such as ports used, protocols and authorizations in detail.

Link to our video tutorial: [Inventory - Video tutorials from DocuSnap experts](#)

Link to our HowTo: [Whitepaper DocuSnap Inventory](#)

4.3 Inventory of decentralized locations

Our DocuSnap Discovery Service is available for the inventory of decentralized locations. This enables automated inventory processes to be carried out in a decentralized network and the results to be transmitted to a central DocuSnap server.

Link to our HowTo: [DocuSnap - Discovery Service](#)

4.4. Manual addition of non-automatically inventoried systems

Our aim is to use DocuSnap to automatically capture around 80% of your network structure. However, your IT documentation would still not be complete. So what happens to the employees' smartphones, the air conditioning in the server room or the projector in the meeting room? No problem! Complete your documentation and simply add the desired systems manually as other assets.

Link to our HowTo: [Other assets \(docusnap.com\)](#)

5. Working with DocuSnap - Analyzing data

You have now completed many important steps. DocuSnap has been successfully installed and your IT environment has been inventoried. Now it's time to analyze and evaluate the data obtained. This is essential so that you can really exploit the added value of your new software. Four important options briefly presented:

5.1. Network plans

„A picture is worth a thousand words“. With DocuSnap, you can get a quick overview of your network and visualize it graphically, e.g. in the form of a topology plan, routing plan or Vlan plan. The plans generated with DocuSnap can be exported in any format, such as Microsoft Visio or HTML.

5.2. Reports

There are already over 200 predefined reports in DocuSnap. These range from a system report on the inventoried data of a Windows server to a directory report to evaluate which users have access to which directory. You can also create your own reports or customize existing ones using the report designer customize. The reports can be exported in various formats such as PDF, Microsoft Word or HTML. All reports can be sent automatically and recurrently by email to freely definable recipients.

You will find the sample reports under the inventory module.

Link to our sample reports: [Sample reports - DocuSnap](#)

5.3. Authorization analysis:

DocuSnap is also the perfect way to provide for IT security and create transparency. Our software automatically creates authorization analyses for the Windows file system, Microsoft Exchange, Active Directory and Microsoft SharePoint. Everyone knows, for example, the stories of the trainee who has collected more authorizations than the IT department and supervisor would like due to working in different business areas. With DocuSnap, this can easily be prevented.

Link to our video tutorial: [IT security - Video tutorials from DocuSnap experts](#)

5.4. License management:

Do you know which software products are used in your company and what their purchase receipts are? What would happen if Microsoft suddenly knocked on your door and asked for a self-disclosure of license usage? With DocuSnap, you now always have an overview of your license situation. You can automatically record the software already installed. By manually entering the corresponding invoices, contracts and cost centers, our software then provides you with the target/actual comparison. An e-mail notification, e.g. when a maintenance contract expires, can also be defined here.

Link to our video tutorial: [License management - Video tutorials from DocuSnap experts](#)

Link to our HowTo: [DocuSnap - Message definition](#)

6. Data quality

Data maintenance and data quality are particularly important to us. Only if the data collected with Docusnap is up-to-date and complete it can be relied upon. Therefore, the person responsible for Docusnap should check from time to time whether, for example, all (time-controlled) Docusnap jobs are running without errors, whether old computer accounts have accumulated in the Active Directory or whether manually adding valuable information to individual systems in Docusnap would be a useful addition.

Link to our HowTo: [Docusnap - Additional information](#)

7. We are happy to support you in the daily operation of Docusnap

We are also happy to support you from the manufacturer's side with your questions or problems. On our website you will find numerous free videos, tutorials, how-tos, our Docusnap blog with exciting articles and much more. Our Premium-Support is already covered during the Docusnap test phase and of course also for all current rental subscriptions and valid service contracts.

Of course, we also offer workshops and training opportunities to assist you with your implementation or to implement specific requirements with you. If you are interested, you will find an [overview of our fee-based service options on our website](#).

Contact details Docusnap Support:

Docusnap Support-Hotline	E-Mail Docusnap Support	Support-Tickets online
+49 (0) 8033 6978-4545 (available Mon-Fri from 08:00 to 17:00 with the exception of Bavarian public holidays)	support@docusnap.com	You can open tickets and view, edit and comment on your support requests via our web portal at support.docusnap.com .

Docusnap video tutorials: Our experts explain Docusnap from A-Z in entertaining and very informative videos. Link to our topic overview: [Docusnap video tutorials - for beginners and advanced users](#).

Docusnap Community: Here we look forward to an active exchange between all Docusnap users. You can register via the following link: [Docusnap Community](#)