



Import Customizings

Integrate customizing in DocuSnap

TITLE	Import Customizings
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DATE	8/12/2021
VERSION	1.0 valid as of August 12, 2021

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1. Introduction

This document describes how you can implement the customized Inventory List in Docusnap.

Before importing a new customizing, you should backup the Docusnap database!

2. Introduction to customizing in Docusnap

Customizing in Docusnap means adapting and creating your own reports, extending the database and tree structure (meta objects) as well as data entry screens.

Reports can be newly created or the available ones in Docusnap can be adapted to your requirements.

The database structure can be extended. You can add new columns to existing tables or create new tables.

Adjustments to the database structure are usually completed with an adaption of the meta objects (extension of the tree structure) and data entry screens.

Adapted / newly created reports are stored as MRT files within the system paths - Local / Team Settings - Reporting. These system paths should be included in every client installation of Docusnap (central storage and shared via the network). This ensures that every colleague has access to the customized or newly created reports.

Adjustments to the database structure and meta objects are stored directly in the database and in Docusnap's metaschema. This metaschema can be seen as a directory of existing tables, columns and meta objects. By exporting this metaschema, customized database structures and meta objects can be exported / imported. The export of a metaschema is stored into a .DSU file.

Reports are available as MRT files and are imported within the administration of Docusnap.

Like reports, data entry screens are available as files. Customized or newly created data entry screens can also be found within the system paths - Local / Team Settings, in the subfolder DataEdit. Data entry screens have the file extension .DEU.

3. Implementing customzings

Components of a customizing can be metaschemas and input masks. In addition, reports can also be imported into Docusnap. As described in the previous chapter, metaschemas end in the file extension .DSU, input masks in the file extension .DEU and reports in .MRT.

Before importing a new customizing, you should backup the Docusnap database!

3.1 Importing the metaschema

You can import the metaschema in the Docusnap Management - Customizing - Import Schema.

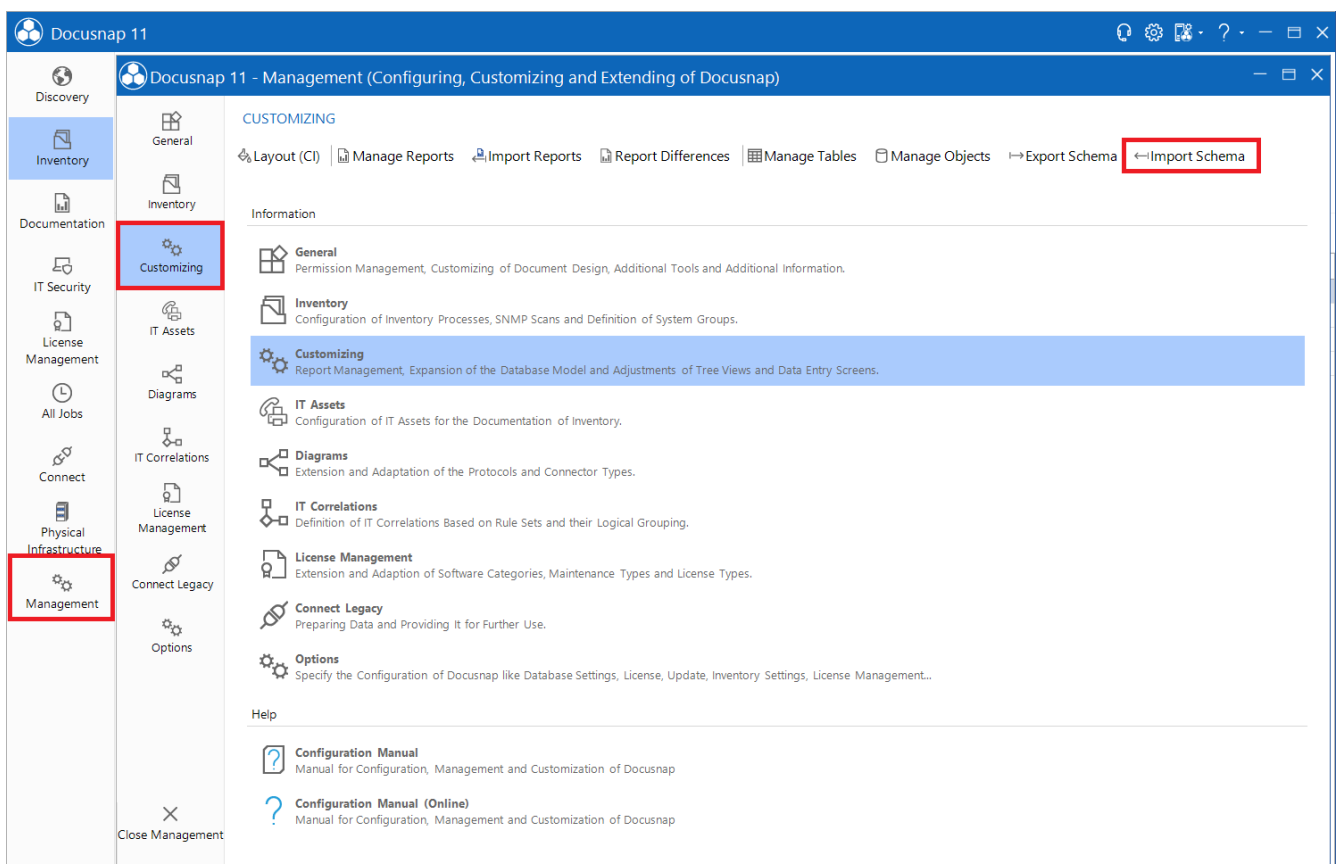


Figure 1 - Importing the metaschema

In the first step you select the metaschema from the file system.

In the second step the objects which will be implemented will be listed and checked. The objects are checked to see whether objects with corresponding IDs are already available.

Import Metaschema □ ×

1

2

3

4

5

Select File
Check Objects
Check Tables
Summary
Report

Metaobjects Check

If an object already exists in the target database, a checkbox is displayed at the beginning of the row. If the checkbox is enabled, the object in the database will be overwritten. Otherwise, a new object will be created.

<input type="checkbox"/>	Object Name	Type ID	Name	Type	Parent
<input checked="" type="checkbox"/>	EXP_U_BackupExecBackupJobs_Data	1000089	Backup Exec Backup Jobs System	Data	EXP_
	EXP_U_BackupExecBackupJobsSystem_LinkedObject	1000090	BackupExecBackupJobsSystem_LinkedObject	Linked Object	EXP_
<input checked="" type="checkbox"/>	EXP_U_LinkedAWSEC2_Data	1000055	AWS EC2	Data	EXP_
	EXP_U_LinkedAWSEC2_LinkedObject	1000056	LinkedAWSEC2_LinkedObject	Linked Object	EXP_
<input checked="" type="checkbox"/>	EXP_U_LinkedAzureVM_Data	1000053	Azure VM	Data	EXP_
	EXP_U_LinkedAzureVM_LinkedObject	1000054	LinkedAzureVM_LinkedObject	Linked Object	EXP_
<input checked="" type="checkbox"/>	EXP_U_LinkedBackupExec_Data	1000047	Backup Exec	Data	EXP_
	EXP_U_LinkedBackupExec_LinkedObject	1000048	LinkedBackupExec_LinkedObject	Linked Object	EXP_
<input checked="" type="checkbox"/>	EXP_U_LinkedBackupExecJobs_Data	1000088	Backup Exec Linked Backup Jobs	Data	EXP_
	EXP_U_LinkedCIFS_Data	1000064	CIFS	Data	EXP_
	EXP_U_LinkedCIFS_LinkedObject	1000065	LinkedCIFS_LinkedObject	Linked Object	EXP_
<input checked="" type="checkbox"/>	EXP_U_LinkedCitrixHypervisor_Data	1000091	Linked Citrix Hypervisor	Data	EXP_
	EXP_U_LinkedCitrixHypervisor_LinkedObject	1000092	LinkedCitrixHypervisor_LinkedObject	Linked Object	EXP_
	EXP_U_LinkedDFS_Data	1000040	DFS	Data	EXP_

✓
The object model has been checked successfully.

Figure 2 - Checking objects for the import

ATTENTION!

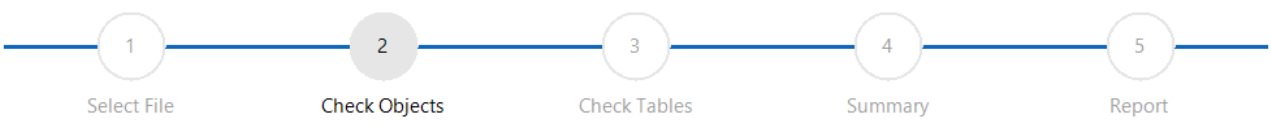
If an object already exists in the database, a checkbox is available, and the font color is red.

If the checkbox is enabled, the existing object will be overwritten, otherwise a new object is created in the target database.

Disable any checkboxes. You do not want to overwrite any objects while importing this metaschema!

Confirm the remaining steps and start the import.

Import Metaschema
□ ×



Metaobjects Check

If an object already exists in the target database, a checkbox is displayed at the beginning of the row. If the checkbox is enabled, the object in the database will be overwritten. Otherwise, a new object will be created.

	Object Name	Typ ID	Name	Type	Parent
<input type="checkbox"/>	EXP_U_BackupExecBackupJobs_Data	1000089	Backup Exec Backup Jobs System	Data	EXP_U_
<input type="checkbox"/>	EXP_U_BackupExecBackupJobsSystem_LinkedObject	1000090	BackupExecBackupJobsSystem_LinkedObject	Linked Object	EXP_U_
<input type="checkbox"/>	EXP_U_LinkedAWSEC2_Data	1000055	AWS EC2	Data	EXP_U_
<input type="checkbox"/>	EXP_U_LinkedAWSEC2_LinkedObject	1000056	LinkedAWSEC2_LinkedObject	Linked Object	EXP_U_
<input type="checkbox"/>	EXP_U_LinkedAzureVM_Data	1000053	Azure VM	Data	EXP_U_
<input type="checkbox"/>	EXP_U_LinkedAzureVM_LinkedObject	1000054	LinkedAzureVM_LinkedObject	Linked Object	EXP_U_
<input type="checkbox"/>	EXP_U_LinkedBackupExec_Data	1000047	Backup Exec	Data	EXP_U_
<input type="checkbox"/>	EXP_U_LinkedBackupExec_LinkedObject	1000048	LinkedBackupExec_LinkedObject	Linked Object	EXP_U_
<input type="checkbox"/>	EXP_U_LinkedBackupExecJobs_Data	1000088	Backup Exec Linked Backup Jobs	Data	EXP_U_
<input type="checkbox"/>	EXP_U_LinkedCIFS_Data	1000064	CIFS	Data	EXP_U_
<input type="checkbox"/>	EXP_U_LinkedCIFS_LinkedObject	1000065	LinkedCIFS_LinkedObject	Linked Object	EXP_U_
<input type="checkbox"/>	EXP_U_LinkedCitrixHypervisor_Data	1000091	Linked Citrix Hypervisor	Data	EXP_U_
<input type="checkbox"/>	EXP_U_LinkedCitrixHypervisor_LinkedObject	1000092	LinkedCitrixHypervisor_LinkedObject	Linked Object	EXP_U_
<input type="checkbox"/>	EXP_U_LinkedDFS_Data	1000040	DFS	Data	EXP_U_

✓
The object model has been checked successfully.

Figure 3 - Check objects - Objects already available

3.2 Implementing data entry screens

The integration of input masks takes place within the system paths of Docusnap. Before integrating, you must check the path under which you have stored the local / team settings. Open the options (gear wheel) from the title bar and select System Paths.

Then open the System Paths - Local / Team Settings - DataEdit and insert the input masks.

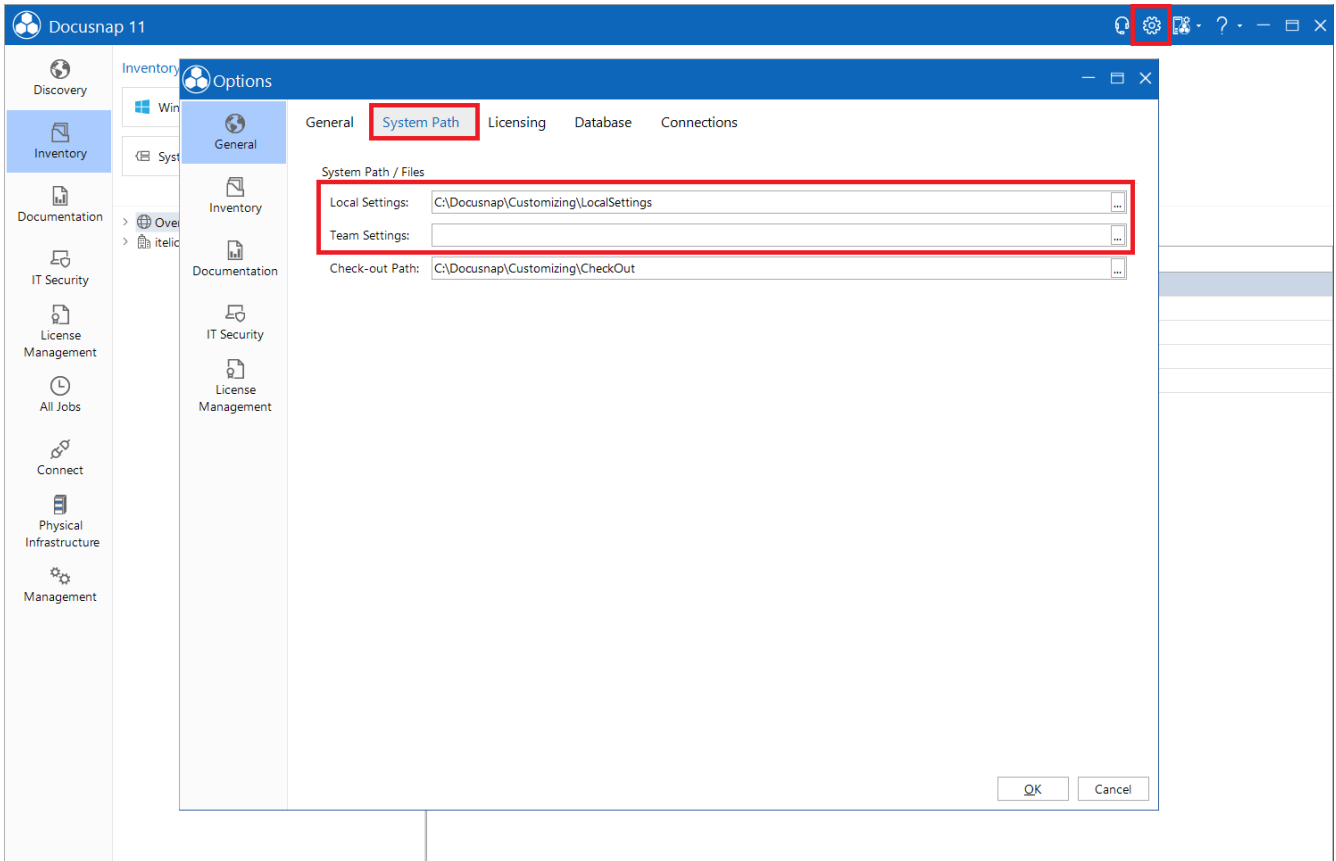


Figure 4 - Checking the system path

3.3 Importing reports

Reports are included within Administration - Customizing - Import Reports in Docusnap.

In the first step, the path where the report file was stored is specified - then the report(s) to be imported is/are displayed.

Select report by report and adjust the name of the report below the settings if necessary. Also make sure that the option **Report Active** is active - otherwise the report will not be displayed in the Data Explorer after import.

In the next step, select the Report Position in the Data Explorer. This position varies depending on the report. As a rule, a new position cannot be selected without adjusting the report.

After the report has been designated and positioned in the Data Explorer, activate the checkbox, and select **Import Reports**.

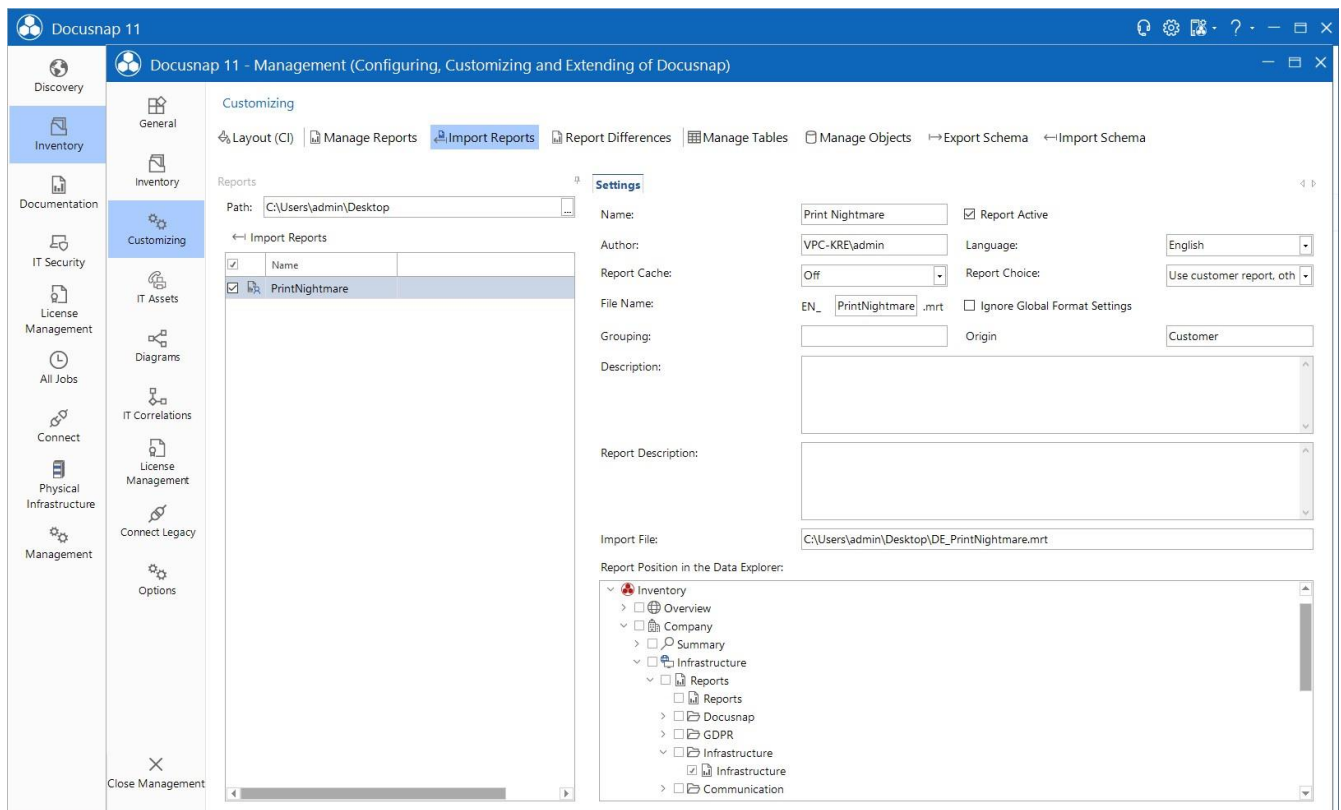


Figure 5 - Importing reports

VERSION HISTORY

Date	Description
August 12, 2021	Version 1.0 created
