



## **DocuSnap – Additional Information**

Adding Additional Information to DocuSnap

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## 1. Introduction

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

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

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

- Comments
- Financial Records
- Contracts
- Passwords
- Tasks

## 2. Additional Information – General

To create or assign additional information to an object, it must be selected in the tree structure. Afterwards it is possible to switch to the tab **Additional Information**.

By selecting **New**, new additional information can be created for the currently selected object. With the **Assign Additional Information** function, existing additional information can be assigned to the object.

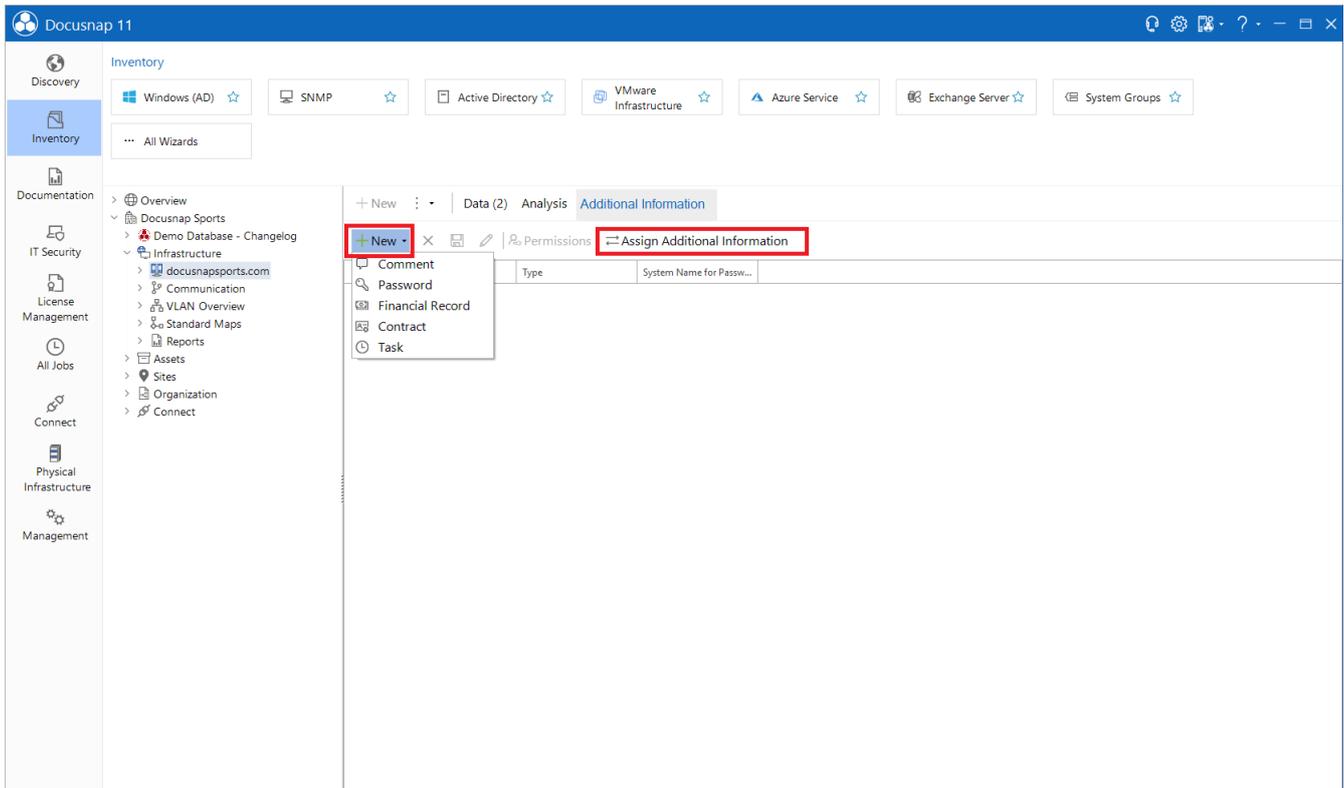


Fig. 1 -Adding additional information

It is also possible to create additional information via the overview. The desired type is selected in the tree structure and a new entry is created via **New**.

Additional information created in the overview are not directly assigned to an object. This assignment is made when the additional information is filled with details.

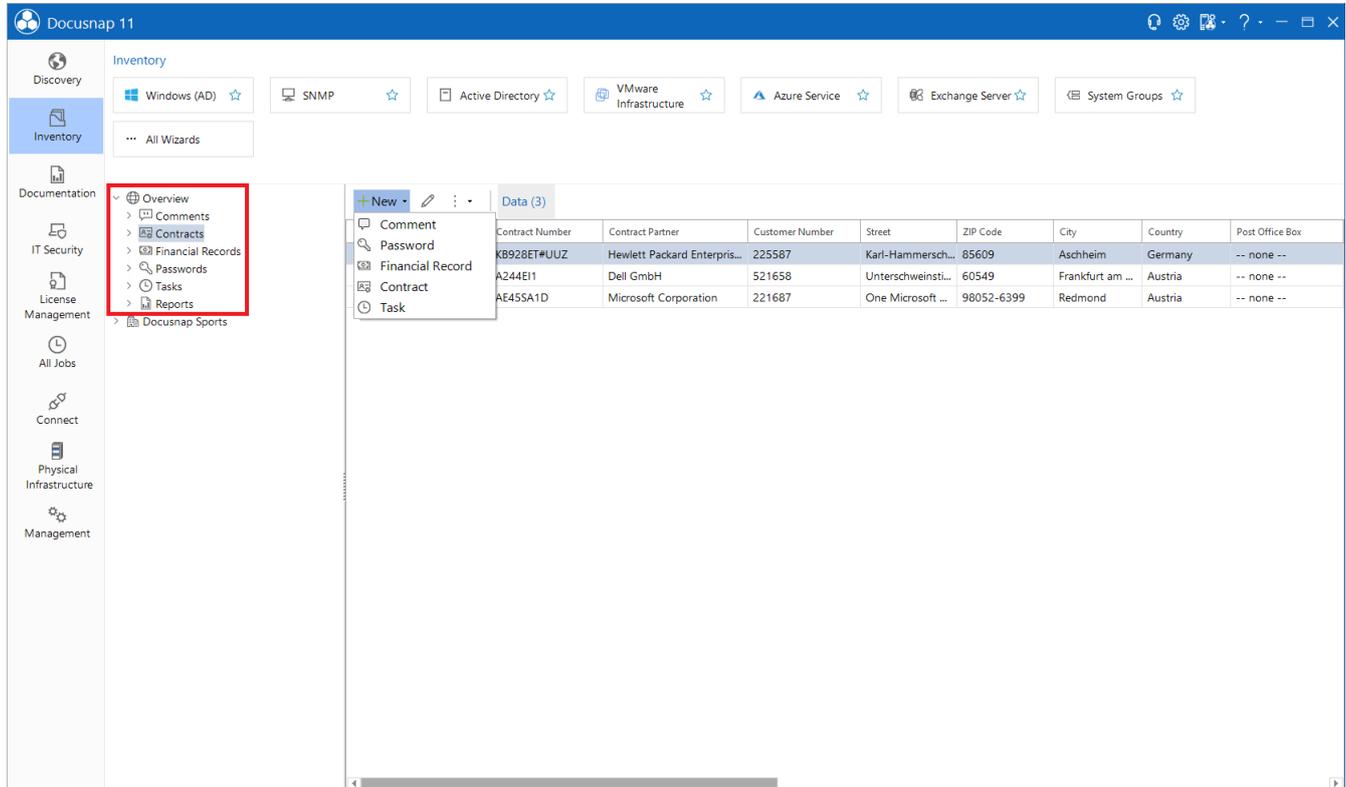


Fig. 2 - Additional information in the overview

### 2.1.1 Overview

Activities such as creating, naming, authorizing and assigning are identical for each additional information type. The common fields are explained using a comment as an example.

- MS SQL Server Installation Guide has been set as the **Title**. The title is a mandatory field.
- The **description field** allows a description with formatting, UNC and URL links are supported. Text files can be dragged and dropped into this field
- This additional information can be assigned to any objects in the **hierarchy**
- If the additional information was saved, any **attachments** can be assigned to the additional information.
- All additional information has a **category**. These can be customized.
- In the Docusnap user administration you can assign Docusnap users to categories. If a **category** has been defined for additional information, only those users who belong to this category have access. This function is optional.

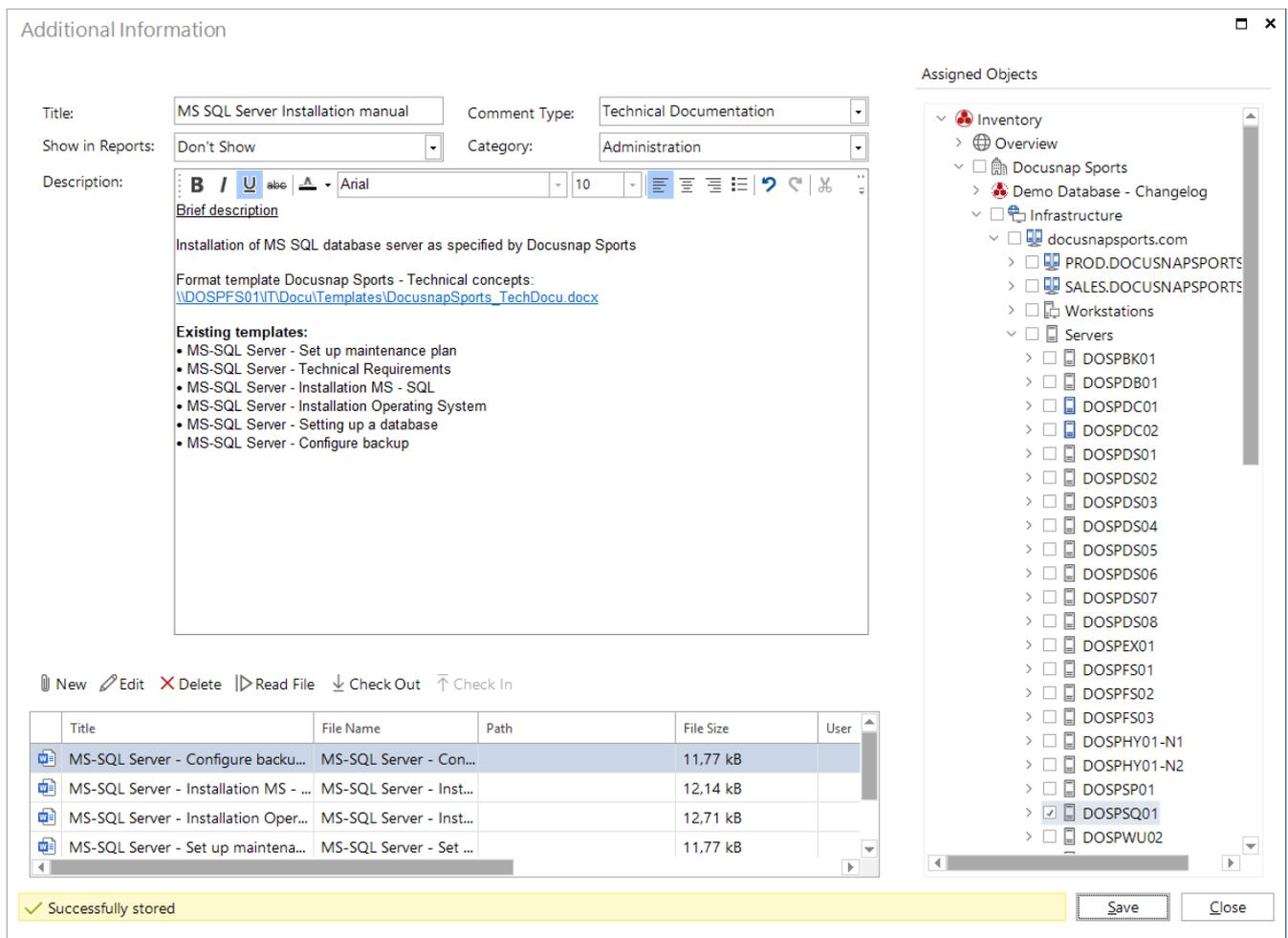


Fig. 3 - Common features

## 2.1.2 Add attachments

With additional information, files required in Docusnap, e.g. maintenance plans, manufacturer documentation or the firmware of a switch can be provided as an attachment.

After additional information has been saved, you can add attachments to it. These can be any files. These files are stored directly in the database as binary large objects (BLOB). This means that the Docusnap database grows with each additional piece of information. Several files can be added as attachments via drag and drop.

### Check-in and check-out of attachments

Added attachments can be saved directly from Docusnap back to the file system. After editing, the file must be checked into the database manually. These actions are executed with control elements in the attachments. Read File tries to load the attachment and open it with the linked application (depending on the file type).

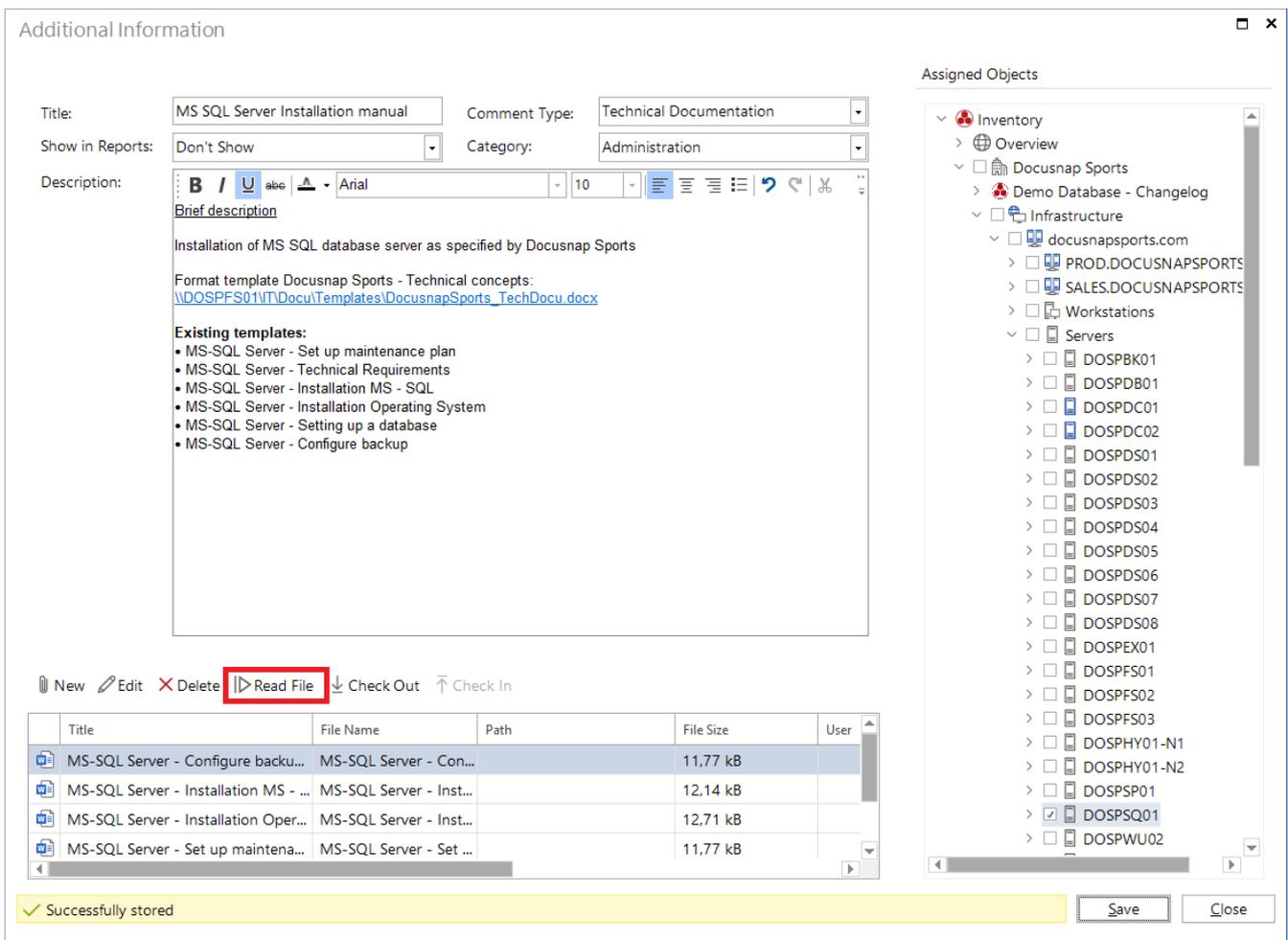


Fig. 4 - Managing attachments

By specifying the check-out path (Options - General - System paths), you can determine the directory in which the attachment is written to the file system. Write access is only possible if the file is checked out of the database.

### 2.1.3 Edit categories

All additional information types can be assigned to categories for better subdivision. Various categories are already included in the Docusnap standard. These categories can be extended, edited and deleted.

You can find the corresponding function in the navigation area in Administration - General - Additional Information.

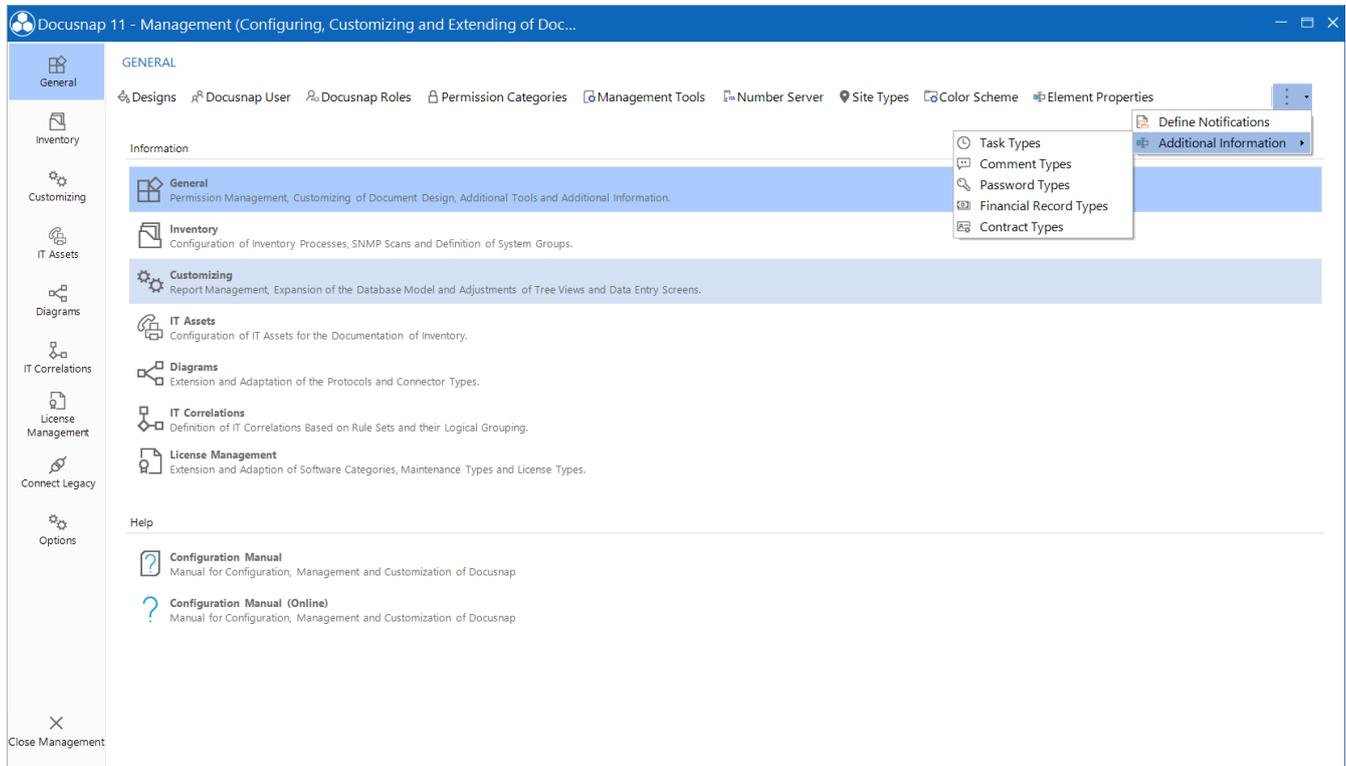


Fig. 5 - Edit Categories

## 2.2 Comments

This additional information is most universally applicable. The large comments field allows to create formatted comments using URL and UNC links. Typical examples are maintenance plans, change logs of systems, installation instructions and documents from the data security environment.

The Docusnap data sheet is a very detailed report of a system. For this report, you can select via the function **Show in Report** if this comment should be automatically printed at the beginning or end of the report.

### Special Case: License Management - Creating Comments

In addition to the method already described, comments can also be created in the License Management - Create License Wizard. These comments are automatically linked to the created license

## 2.3 Financial Records

This additional information enables objects to be expanded with business information. There are data fields for acquisition, depreciation and cost accounting.

Financial documents can also be displayed in the report.

## 2.4 Passwords

The additional information Passwords allows to store passwords encrypted in the Docusnap database with object reference like system, user or domain passwords. Especially for this additional information it can be useful to use the Category data field. This allows access only to a selected group of people.

A validity date can also be stored for passwords. With the help of a notification it is possible to receive an automatic message if passwords expire. Further information on message definition is documented in the [HowTo Defining Notifications](#) in the Docusnap [Knowledge Base](#).

The password can also be displayed or copied in plain text within the password control.

### 2.4.1 Encryption Module

The passwords are encrypted twice. First with the 256-bit key after Rijndael contained in Docusnap. This product is encrypted a second time with the customer key. The customer key is created via the **Create Database** dialog. Each Docusnap database can only be connected to a customer key once. If this key is lost, it is no longer possible for the manufacturer to decrypt the passwords in the database. One customer key can be used for several Docusnap databases.

## 2.4.2 Creating an Encryption Module

In this dialog the encryption module is created. This is done either during the basic installation or later in Options - General Options - Database.

If an encryption module is created subsequently, it must be ensured that the Docusnap server also has access to the module.

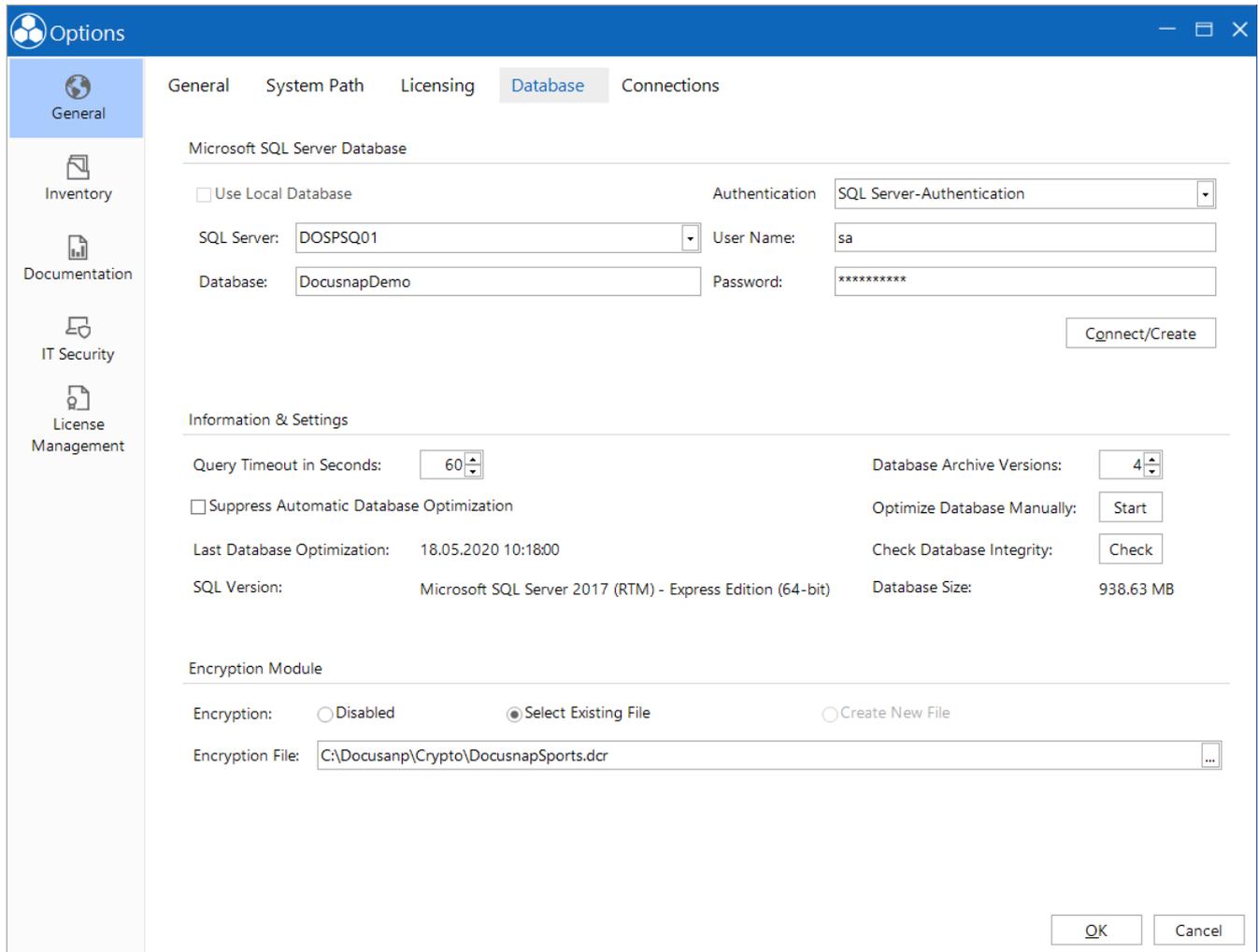


Fig. 6 - Encryption Module

## 2.5 Contracts

Contracts provide special data fields for the contact details of the contract partner, the contract number, the closing date, and the end date. A typical example are maintenance contracts for servers.

### Special case: License management - creation of contracts

In addition to the method already described, contracts can also be created in the License Management - Create Licenses wizard. These contracts are automatically linked to the created license.

In addition, a start and an end date can be stored. In this way, it is possible to be notified which contracts will expire within the next three months, for example. Further information about the message definition is documented in the [HowTo Message Definition](#) in the Docusnap [Knowledge Base](#).

Contracts can also be displayed in the report.

## 2.6 Tasks

The additional information Task is suitable for storing tasks (with the required documents as attachments) in Docusnap. An automatic notification is sent by message definition when the task is due. A typical application is the periodic maintenance of UPS devices.

If a reminder date is maintained, it is possible to use a message definition to configure a time-controlled order that checks, for example, which tasks are due next month.

Further information about the message definition is documented in the [HowTo Message Definition](#) in the Docusnap [Knowledge Base](#).

Tasks can also be displayed in the report.

### 3. Additional Information in Docusnap Web

Access to the additional information via Docusnap Web is also possible. The prerequisite for this is a working Docusnap server configuration.

Additional information can be accessed in Docusnap Web via the organization. Access via the assigned object is also possible.

If additional information contains attachments, they can be downloaded directly.

**Important:** Due to security reasons it is not possible to display passwords in Docusnap Web in clear text. Also, the report Passwords is not available in Docusnap Web.

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## VERSION HISTORY

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<b>Date</b>	<b>Description</b>
August 15, 2016	Version 0.1 – First draft
September 05, 2016	Version 1.0 – Screenshots adapted to the RTM version
September 15, 2016	Version 1.01 – Reference to section 2.1.4, Attachments corrected
October 24, 2018	Version 1.2 – Screenshots updated
April 27, 2020	Version 2.0 - Revision of the HowTos for Docusnap 11

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