



## Customizing – Create a Data view

Extension of the tree structure with own views

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<b>AUTHOR</b>	Docusnap Consulting
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## 1. INTRODUCTION

In addition to creating your own views and tables via the **customizing** area, Docusnap also supports individual customization using Docusnap Connect.

The idea behind Docusnap Connect is to compile specific data content quickly and easily via the user interface without having to know the table structure. You can find a corresponding **HowTo** in our Knowledge Base - **Docusnap Connect Export / Import**

For requirements that cannot be covered by Docusnap Connect, this document will help you. It describes the possibility of creating your own views of the Docusnap database data in the tree structure. It is a guide for Microsoft SQL experienced system administrators.

One view can be used to display data from different tables in the Docusnap database in a common list.

As an application example, a view is created in which all workstations are displayed with the host name and the operating system used. This serves as a basis for adding further information to this view.

## 2. PREPARATIONS

### 2.1 IDENTIFY DATA SOURCES

The first step is to identify the data sources (tables and columns) that you need within the view and familiarize yourself with them.

You can manage this in Administration - Customizing - Manage Objects.

This area contains the structure of the data tree. The data tree is built from meta objects of different categories. The two most common categories are **heading** and **dates**.

The relevant category for you is **data**. On the following screenshot you can see that for the objects of the category **Data** the field **Table** is filled - **tDocu**. In this case, this is the table in which the data of the snapshots of a system are stored.

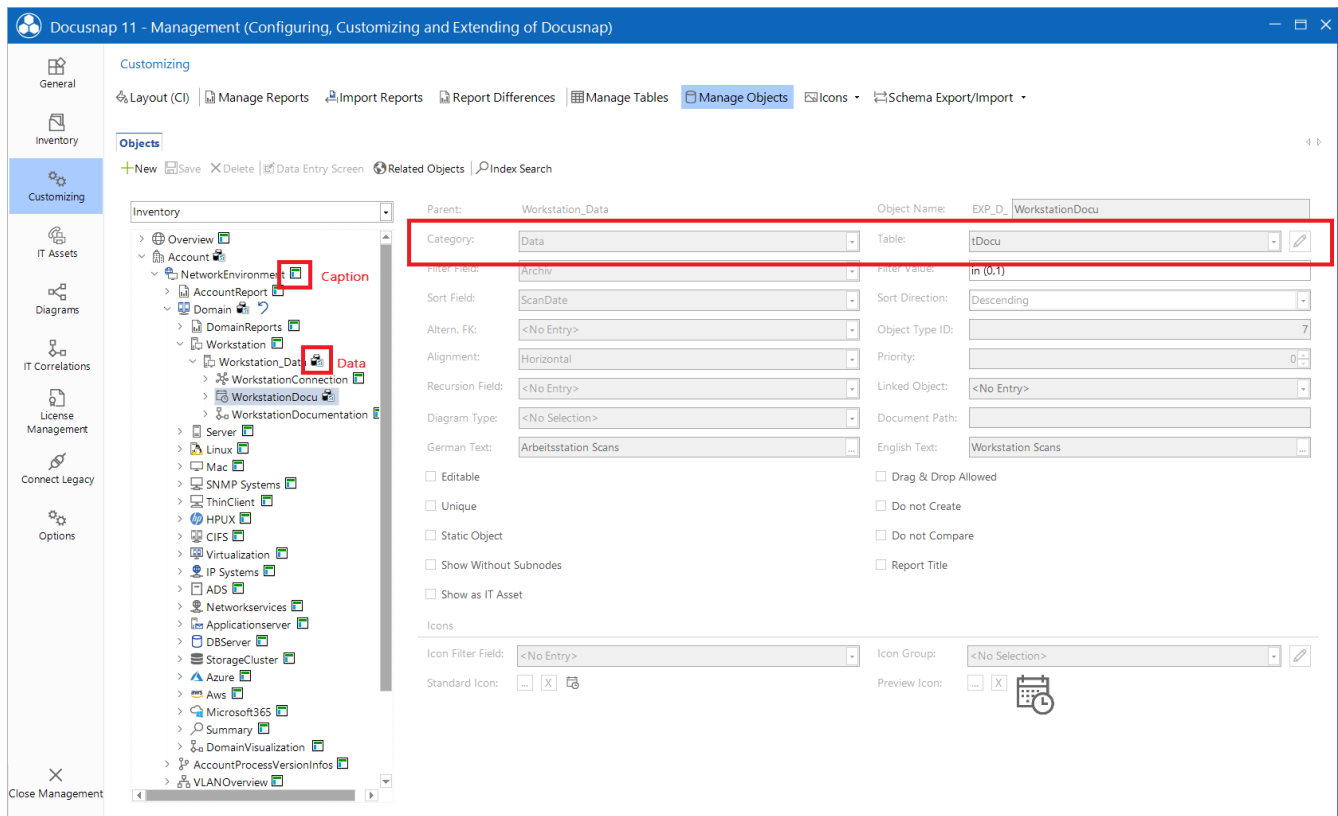


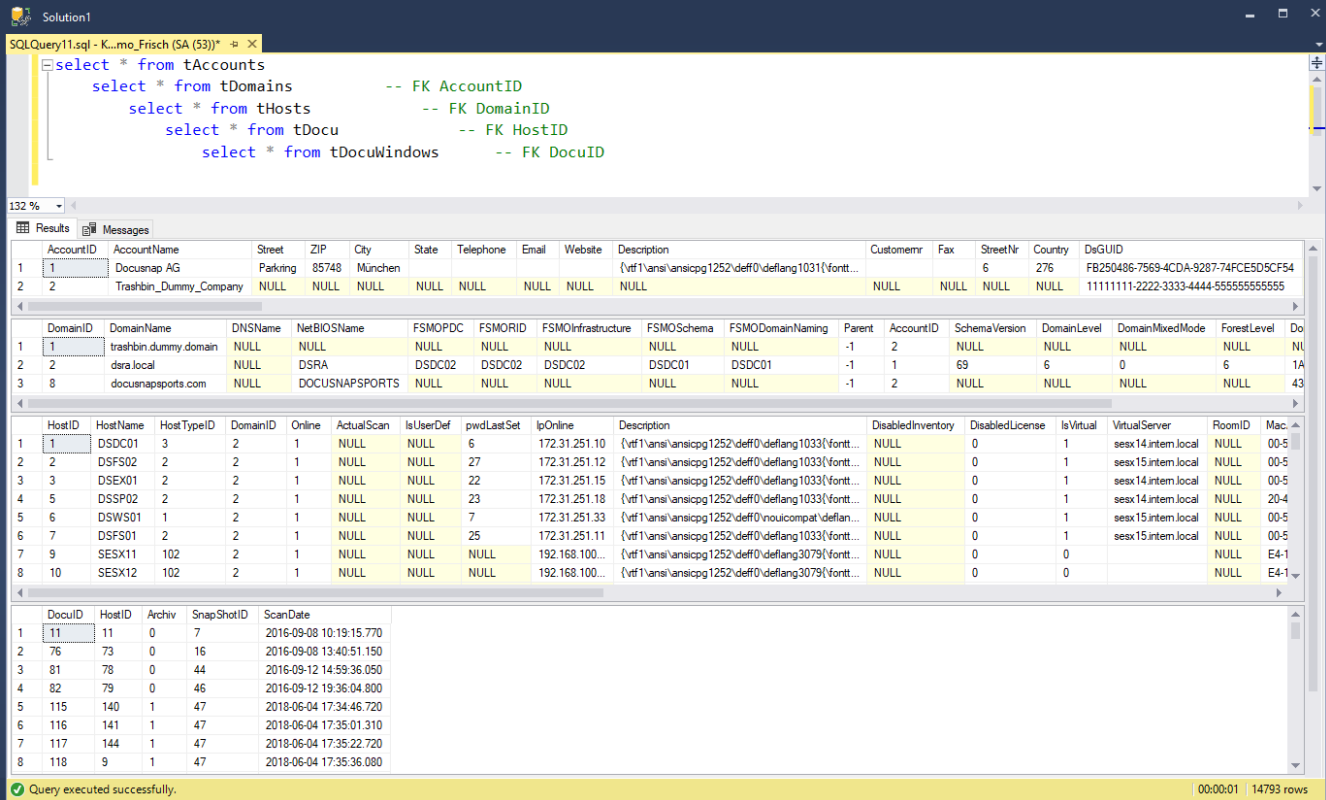
Fig. 1 - Docusnap data tree

Also check the tables for the following objects:

- Account
  - Domain
    - Server\_Data
      - ServerDocu
        - ServerDetails\_Data

tAccounts  
tDomains  
tHosts  
tDocu  
tDocuWindows

If you now look at these tables within SQL Management Studio, you will see the corresponding dependencies between them.



The screenshot shows a SQL query executed in SQL Server Enterprise Manager (SSMS). The query is as follows:

```
select * from tAccounts
select * from tDomains      -- FK AccountID
select * from tHosts       -- FK DomainID
select * from tDocu        -- FK HostID
select * from tDocuWindows -- FK DocuID
```

The results pane displays four tables:

AccountID	AccountName	Street	ZIP	City	State	Telephone	Email	Website	Description	Customerr	Fax	StreetNr	Country	DaGUID
1	Docusnap AG	Parking	85748	München					{vtf1\ansi\ansicpg1252\deff0\deflang1033\fontt...			6	276	FB250486-7569-4CDA-9287-74FCE5D5CF54
2	Trashbin_Dummy_Company													11111111-2222-3333-4444-555555555555

DomainID	DomainName	DNSName	NetBIOSName	FSMOPDC	FSMORID	FSMOInfrastructure	FSMOschema	FSMODomainNaming	Parent	AccountID	SchemaVersion	DomainLevel	DomainMixedMode	ForestLevel	Do
1	trashbin.dummy.domain	NULL	NULL	NULL	NULL	NULL	NULL	NULL	-1	2	NULL	NULL	NULL	NULL	NU
2	dsra.local	NULL	DSRA	DSDC02	DSDC02	DSDC02	DSDC01	DSDC01	-1	1	69	6	0	6	1A
3	docusnapports.com	NULL	DOCUSNAPSPTS	NULL	NULL	NULL	NULL	NULL	-1	2	NULL	NULL	NULL	NULL	43

HostID	HostName	HostTypeID	DomainID	Online	ActualScan	IsUserDef	pwdLastSet	IpOnline	Description	DisabledInventory	DisabledLicense	IsVirtual	VirtualServer	RoomID	Mac
1	DSDC01	3	2	1	NULL	NULL	6	172.31.251.10	{vtf1\ansi\ansicpg1252\deff0\deflang1033\fontt...	NULL	0	1	sesx14.intern.local	NULL	00-5
2	DSFS02	2	2	1	NULL	NULL	27	172.31.251.12	{vtf1\ansi\ansicpg1252\deff0\deflang1033\fontt...	NULL	0	1	sesx15.intern.local	NULL	00-5
3	DSEX01	2	2	1	NULL	NULL	22	172.31.251.15	{vtf1\ansi\ansicpg1252\deff0\deflang1033\fontt...	NULL	0	1	sesx14.intern.local	NULL	00-5
4	DSP02	2	2	1	NULL	NULL	23	172.31.251.18	{vtf1\ansi\ansicpg1252\deff0\deflang1033\fontt...	NULL	0	1	sesx14.intern.local	NULL	20-4
5	DSWS01	1	2	1	NULL	NULL	7	172.31.251.33	{vtf1\ansi\ansicpg1252\deff0\deflang1033\fontt...	NULL	0	1	sesx15.intern.local	NULL	00-5
6	DSFS01	2	2	1	NULL	NULL	25	172.31.251.11	{vtf1\ansi\ansicpg1252\deff0\deflang1033\fontt...	NULL	0	1	sesx15.intern.local	NULL	00-5
7	SESX11	102	2	1	NULL	NULL	NULL	192.168.100...	{vtf1\ansi\ansicpg1252\deff0\deflang3079\fontt...	NULL	0	0		NULL	E4-1
8	SESX12	102	2	1	NULL	NULL	NULL	192.168.100...	{vtf1\ansi\ansicpg1252\deff0\deflang3079\fontt...	NULL	0	0		NULL	E4-1

DocuID	HostID	Archiv	SnapShotID	ScanDate
1	11	0	7	2016-09-08 10:19:15.770
2	76	73	0	2016-09-08 13:40:51.150
3	81	78	0	2016-09-12 14:59:36.050
4	82	79	0	2016-09-12 19:36:04.800
5	115	140	1	2018-06-04 17:34:46.720
6	116	141	1	2018-06-04 17:35:01.310
7	117	144	1	2018-06-04 17:35:22.720
8	118	9	1	2018-06-04 17:35:36.080

Query executed successfully. 00:00:01 14793 rows

Fig. 2 - Analysis of tables in SSMS

## 2.2 CREATION OF AN SQL QUERY

In a view, an SQL query is required to determine the data.

This SQL query can be created, for example, with the Query Designer in SQL Management Studio.

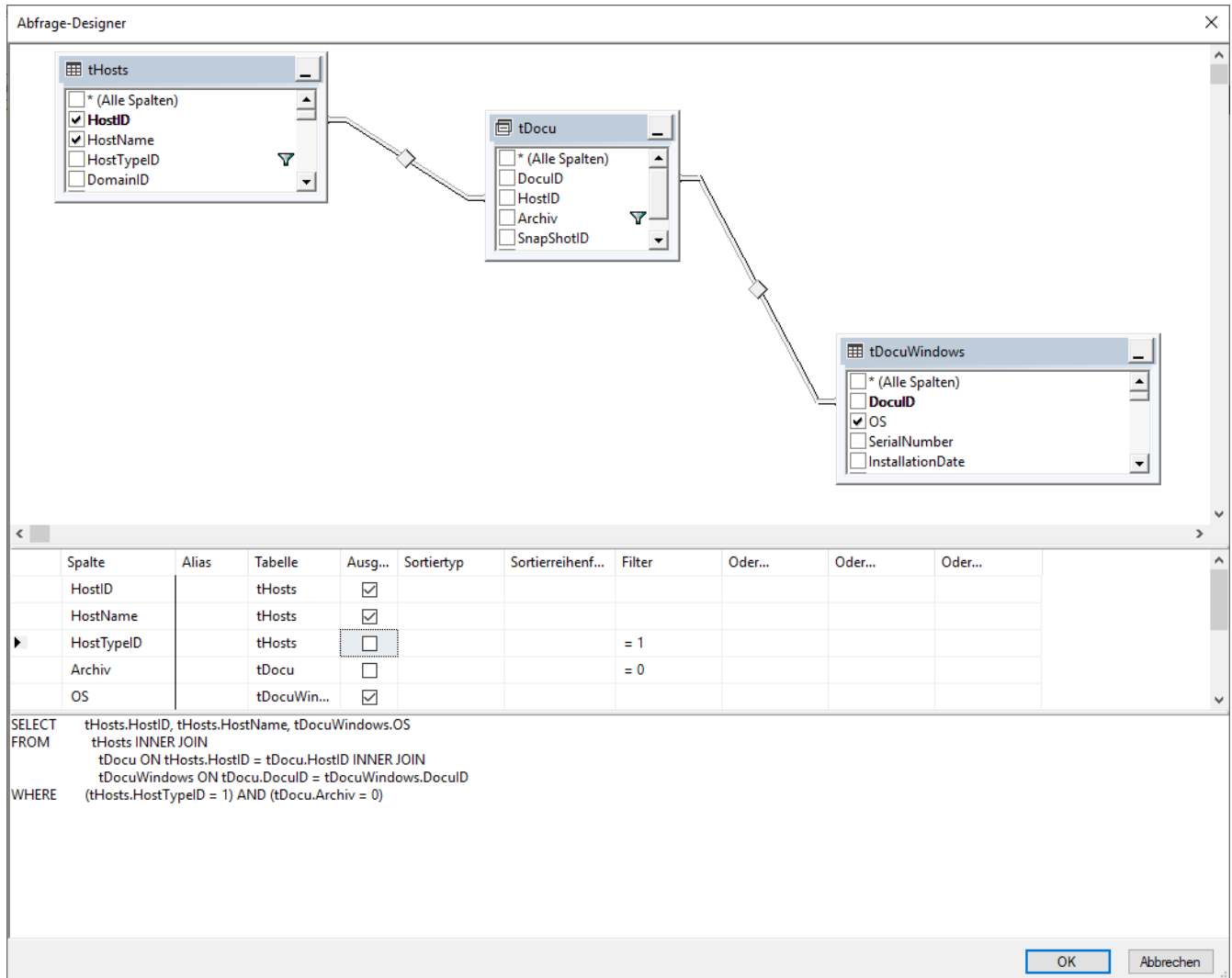


Fig. 3 - Query Designer

The tables required for the application example are

- **tHosts** contains information about the hosts inventoried (e.g. the host name)
- **tDocuWindows** contains general information about a host (e.g. the operating system)
- **tDocu** contains information about the different snapshots of the hosts

Since there can be several snapshots for one host, the query must be restricted to the most recent snapshot by **WHERE tDocu.Archiv = 0**. With the specification **tHosts.HostTypeID = 1** only workstation are selected.

## 2.3 OPTIMIZATION OF THE SQL QUERY

The SQL query generated by the Query Designer:

```
SELECT      tHosts.HostID, tHosts.HostName, tDocuWindows.OS
FROM        tHosts INNER JOIN
            tDocu ON tHosts.HostID = tDocu.HostID INNER JOIN
            tDocuWindows ON tDocu.DocuID = tDocuWindows.DocuID
WHERE       (tHosts.HostTypeID = 1) AND (tDocu.Archiv = 0)
```

can be optimized as follows:

```
SELECT tHosts.HostID, tHosts.HostName, tDocuWindows.OS
FROM tHosts, tDocu, tDocuWindows
WHERE tHosts.HostID = tDocu.HostID
AND   tDocu.DocuID = tDocuWindows.DocuID
AND   tDocu.Archiv = 0
AND   tHosts.HostTypeID = 1
```

This query produces the same result but is much easier to read.

## 2.4 LIMITING THE SQL QUERY

The SQL query determined so far covers all entries in the Docusnap database, regardless of whether they belong to a client or a domain.

To ensure that the view only contains the devices that belong to the respective area in the tree structure (e.g. a domain), the SQL query must be extended by **AND tHosts.DomainID = {FilterID}**.

Advanced SQL query:

```
SELECT tHosts.HostID, tHosts.HostName, tDocuWindows.OS
FROM tHosts, tDocu, tDocuWindows
WHERE tHosts.HostID = tDocu.HostID
AND   tDocu.DocuID = tDocuWindows.DocuID
AND   tDocu.Archiv = 0
AND   tHosts.HostTypeID = 1
AND   tHosts.DomainID = {FilterID}
```

The **FilterID** is a Docusnap internal variable that can be used to restrict a query to the parent object in the tree structure. In the application example, the view is mounted below the domain, whereby the **FilterID** dynamically contains the value of the **domainID** of the respective domain where it is called.

If, for example, the view was to be integrated directly under a company, the **FilterID** would dynamically have the value of the **AccountID** under which it is located. A comparison of the **AccountID** of a company with the **DomainID** of a host leads to a faulty SQL query, which returns either no result or a wrong result.

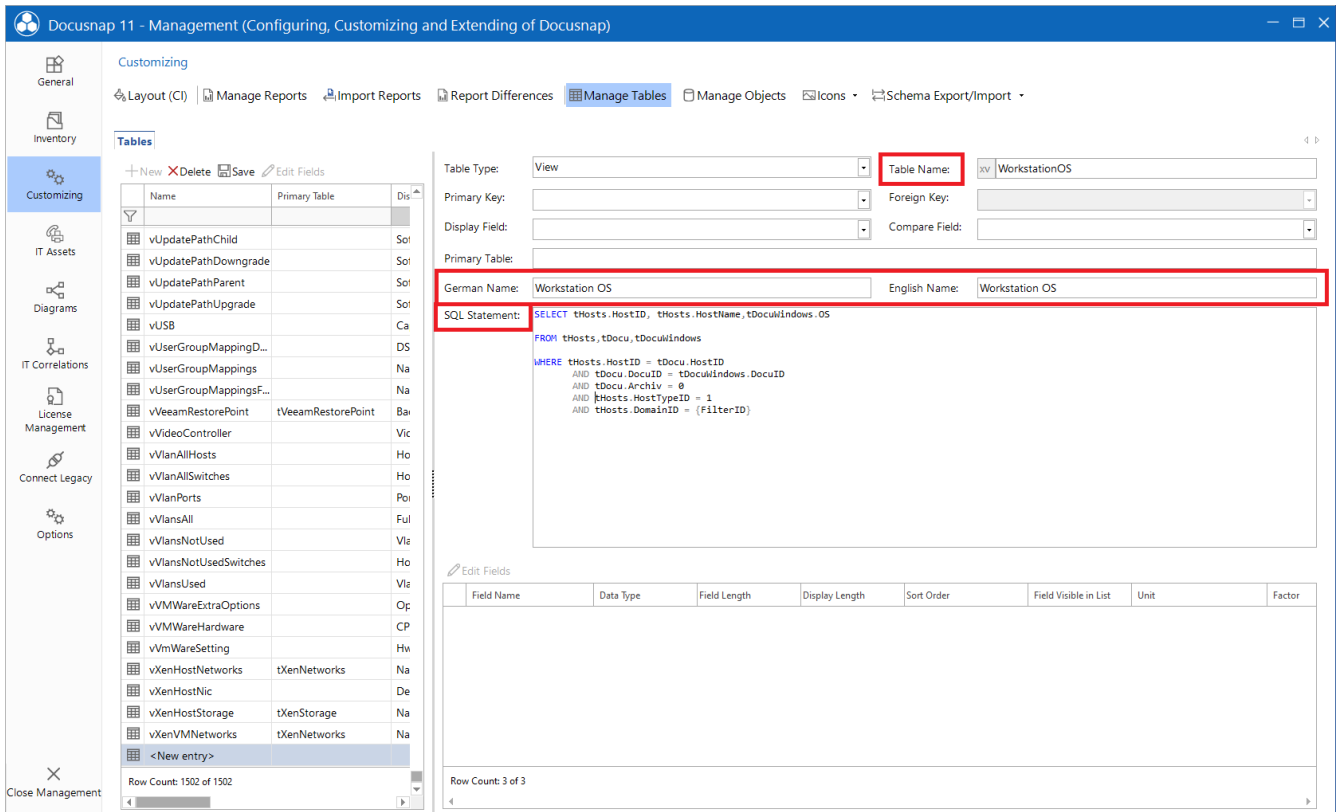


### 3. IMPLEMENTATION

#### 3.1 SIGHT APPLICATION

In the Docusnap Management - Customizing, you can create a new view via Manage tables.

- Assign a table name
- A German and English text
- And the SQL statement



Docusnap 11 - Management (Configuring, Customizing and Extending of Docusnap)

Customizing

Layout (CI) | Manage Reports | Import Reports | Report Differences | **Manage Tables** | Manage Objects | Icons | Schema Export/Import

Tables

+ New X Delete Save Edit Fields

Name	Primary Table	Dis...
vUpdatePathChild	SoI	
vUpdatePathDowngrade	SoI	
vUpdatePathParent	SoI	
vUpdatePathUpgrade	SoI	
vUSB	Ca	
vUserGroupMappingD...	DS	
vUserGroupMappings	Na	
vUserGroupMappingsF...	Na	
vVeeamRestorePoint	tVeeamRestorePoint	Bar
vVideoController	Vic	
vVlanAllHosts	Ho	
vVlanAllSwitches	Ho	
vVlanPorts	Poi	
vVlansAll	Ful	
vVlansNotUsed	Vle	
vVlansNotUsedSwitches	Ho	
vVlansUsed	Vle	
vVMWareExtraOptions	Opc	
vVMWareHardware	CP	
vVmWareSetting	Hw	
vXenHostNetworks	tXenNetworks	Na
vXenHostNic	De	
vXenHostStorage	tXenStorage	Na
vXenVMNetworks	tXenNetworks	Na
<New entry>		

Row Count: 1502 of 1502

Table Type: View

Table Name: WorkstationOS

Primary Key:

Foreign Key:

Display Field:

Compare Field:

Primary Table:

German Name: Workstation OS

English Name: Workstation OS

SQL Statement:

```
SELECT tHosts.HostID, tHosts.HostName, tDocuWindows.OS
FROM tHosts, tDocu, tDocuWindows
WHERE tHosts.HostID = tDocu.HostID
AND tDocu.DocuID = tDocuWindows.DocuID
AND tDocu.Archiv = 0
AND tHosts.HostTypeID = 1
AND tHosts.DomainID = {FilterID}
```

Edit Fields

Field Name	Data Type	Field Length	Display Length	Sort Order	Field Visible in List	Unit	Factor

Row Count: 3 of 3

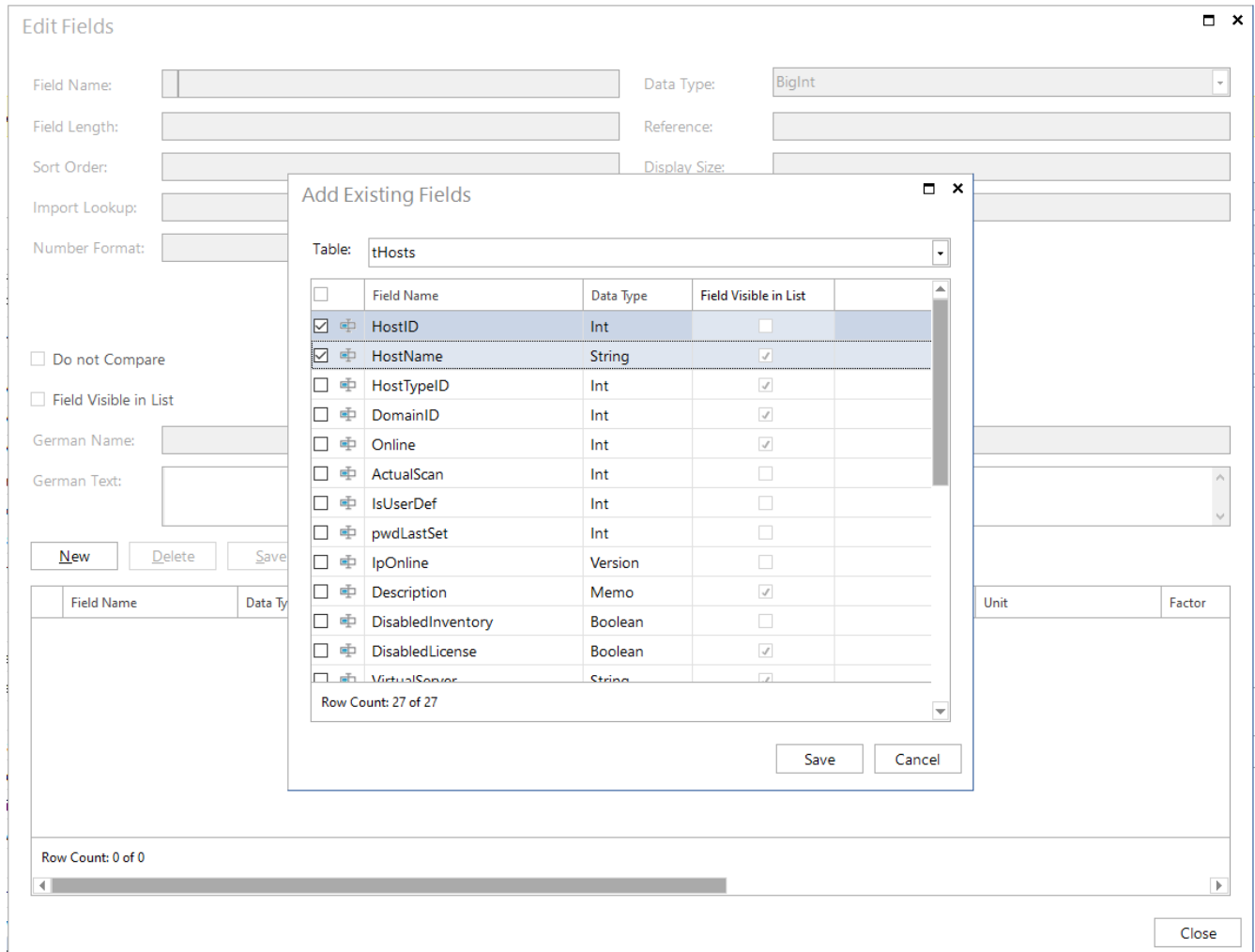
Fig. 4 - Create a view

After creating the view, the next step requires the appropriate fields.

These can be created or imported via **Edit Fields**. Imported means here that you can import the fields that you want to display in the view from existing tables or views.

Alternatively, you can create the fields manually.

The option **Show Field in Lists** defines that a field is also displayed in the list. This option is only available for fields you create yourself.



**Edit Fields**

Field Name:  Data Type:

Field Length:  Reference:

Sort Order:  Display Size:

Import Lookup:

Number Format:

☐ Do not Compare

☐ Field Visible in List

German Name:

German Text:

Field Name | Data Type

Row Count: 0 of 0

**Add Existing Fields**

Table:

<input type="checkbox"/>	Field Name	Data Type	Field Visible in List
<input checked="" type="checkbox"/>	HostID	Int	<input type="checkbox"/>
<input checked="" type="checkbox"/>	HostName	String	<input checked="" type="checkbox"/>
<input type="checkbox"/>	HostTypeID	Int	<input checked="" type="checkbox"/>
<input type="checkbox"/>	DomainID	Int	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Online	Int	<input checked="" type="checkbox"/>
<input type="checkbox"/>	ActualScan	Int	<input type="checkbox"/>
<input type="checkbox"/>	IsUserDef	Int	<input type="checkbox"/>
<input type="checkbox"/>	pwdLastSet	Int	<input type="checkbox"/>
<input type="checkbox"/>	IpOnline	Version	<input type="checkbox"/>
<input type="checkbox"/>	Description	Memo	<input checked="" type="checkbox"/>
<input type="checkbox"/>	DisabledInventory	Boolean	<input type="checkbox"/>
<input type="checkbox"/>	DisabledLicense	Boolean	<input checked="" type="checkbox"/>
<input type="checkbox"/>	VirtualServer	String	<input checked="" type="checkbox"/>

Row Count: 27 of 27

Unit | Factor

Fig. 5 - Importing columns of the view

Edit Fields

Field Name: OS

Field Length:

Sort Order: 0

Import Lookup:

Number Format:

Data Type: String

Reference:

Display Size: 150

Factor:

Icon: X ...

Icon Preview: X ...

☐ Do not Compare

☒ Field Visible in List

German Name: Betriebssystem

German Text:

☐ No Display if NULL

☒ Field Visible in Webclient

English Name: Operating System

English Text:

New
Delete
Save
Add Fields from Other Tables

	Field Name	Data Type	Field Length	Display Length	Sort Order	Field Visible in List	Unit	Factor
	HostID	Int	0	0	0	No		0
	HostName	String	255	120	0	Yes		0
	<New entry>		0	0	0			0

Row Count: 3 of 3

Close

Fig. 6 - Create fields of the view manually

After the creation of the fields, the specifications regarding the primary key and the display field must still be made for the view. It should be noted that a primary key must be selected for the view. However, this does not have to be unique.

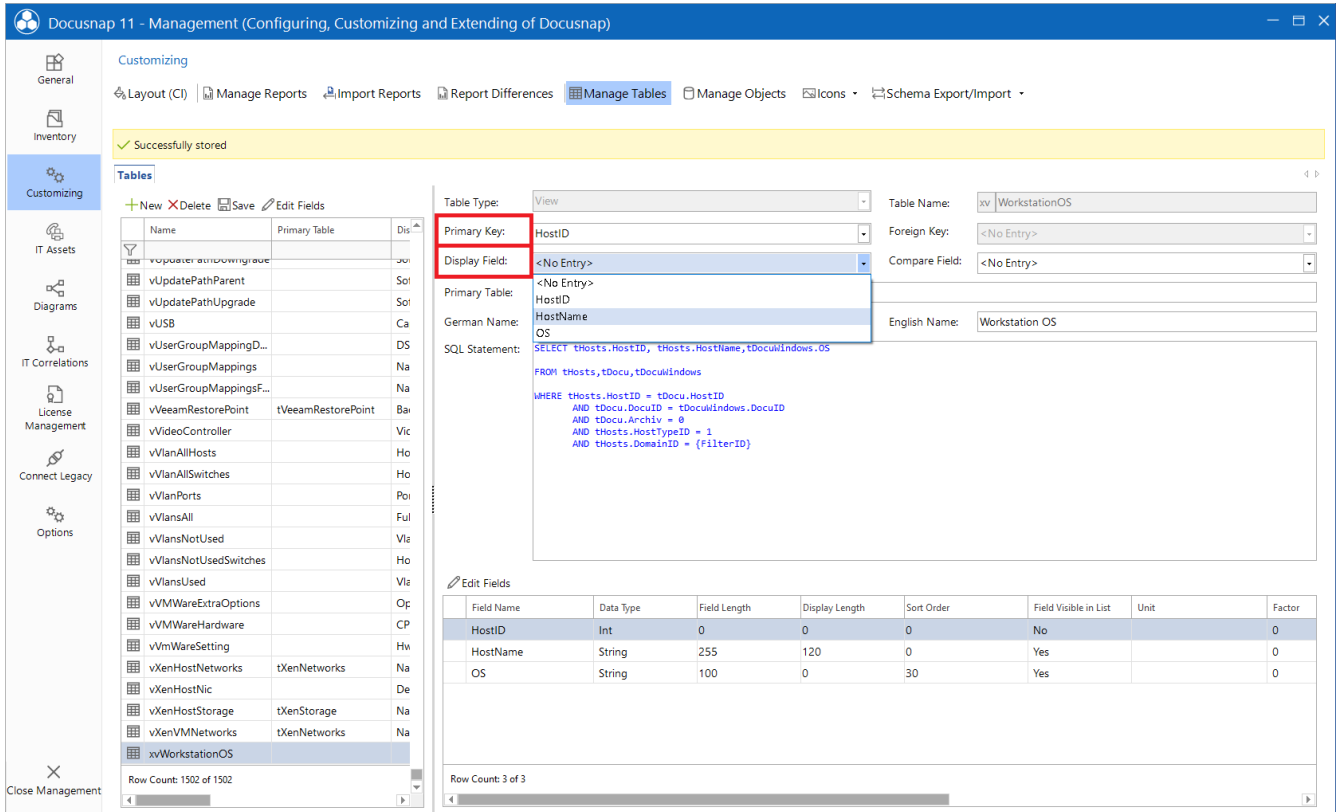


Table Type: View Table Name: xv WorkstationOS

Primary Key: HostID Foreign Key: <No Entry>

Display Field: <No Entry> Compare Field: <No Entry>

Primary Table: <No Entry>

German Name: HostName

English Name: Workstation OS

SQL Statement:

```
SELECT tHosts.HostID, tHosts.HostName, tDocuWindows.OS
FROM tHosts, tDocu, tDocuWindows
WHERE tHosts.HostID = tDocu.HostID
AND tDocu.DocuID = tDocuWindows.DocuID
AND tDocu.Archiv = 0
AND tHosts.HostTypeID = 1
AND tHosts.DomainID = {FilterID}
```

Row Count: 1502 of 1502

Field Name	Data Type	Field Length	Display Length	Sort Order	Field Visible in List	Unit	Factor
HostID	Int	0	0	0	No		0
HostName	String	255	120	0	Yes		0
OS	String	100	0	30	Yes		0

Row Count: 3 of 3

Fig. 7 - Choosing the primary key and display field

## 3.2 CREATE HEADING

To display the view in the Docusnap tree, you must first create an object of type Heading in the Customizing - Manage Objects area.

- To do this, click **New**
- Assign an **object name**
- Select **Heading** as category
- Furthermore, new meta objects need a **German and English text**
- In the Icons section you can create a **standard icon (16x16)** and a **preview icon (100x100)**.
  - In our [community](#) you can download an icon pack

For more information about the additional available options, please refer to the user manual, which you can open by pressing the F1 key.

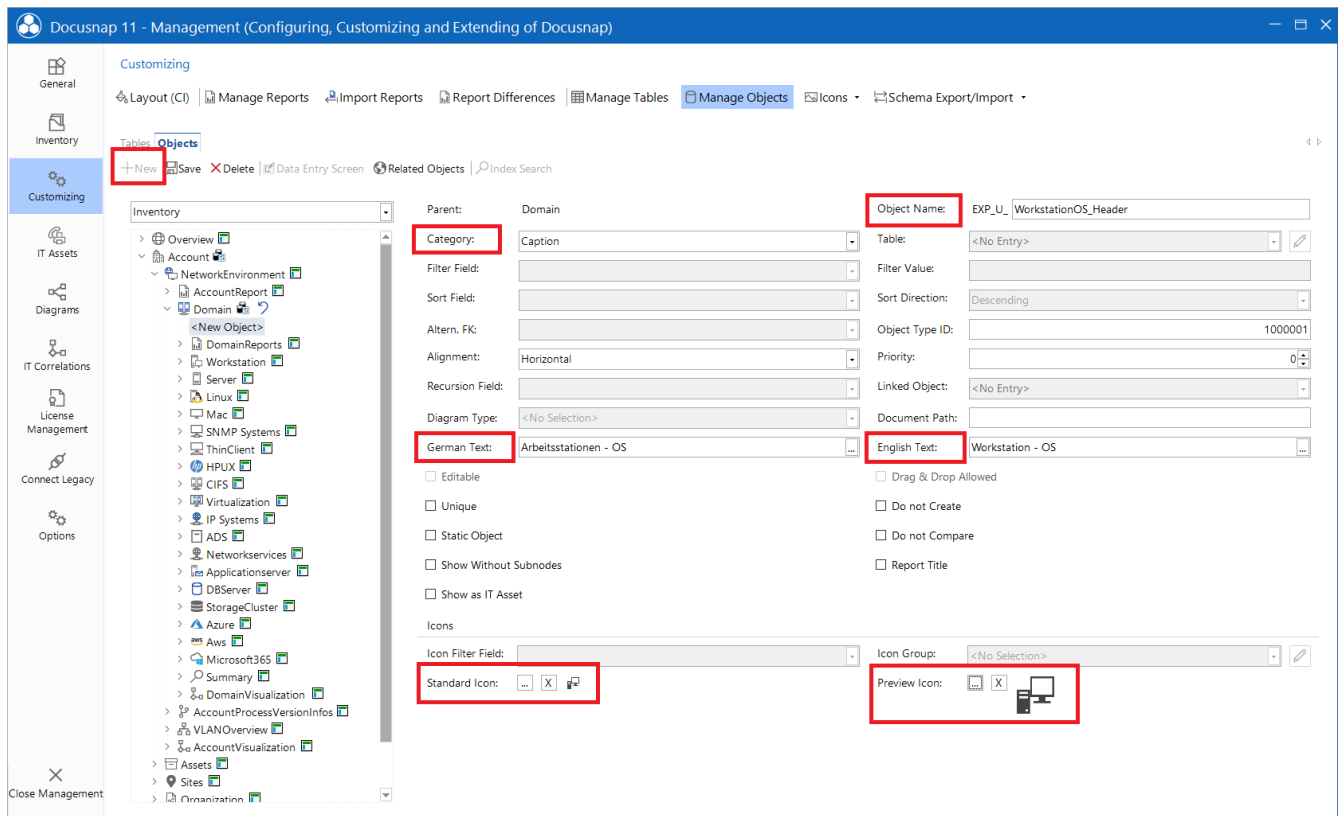
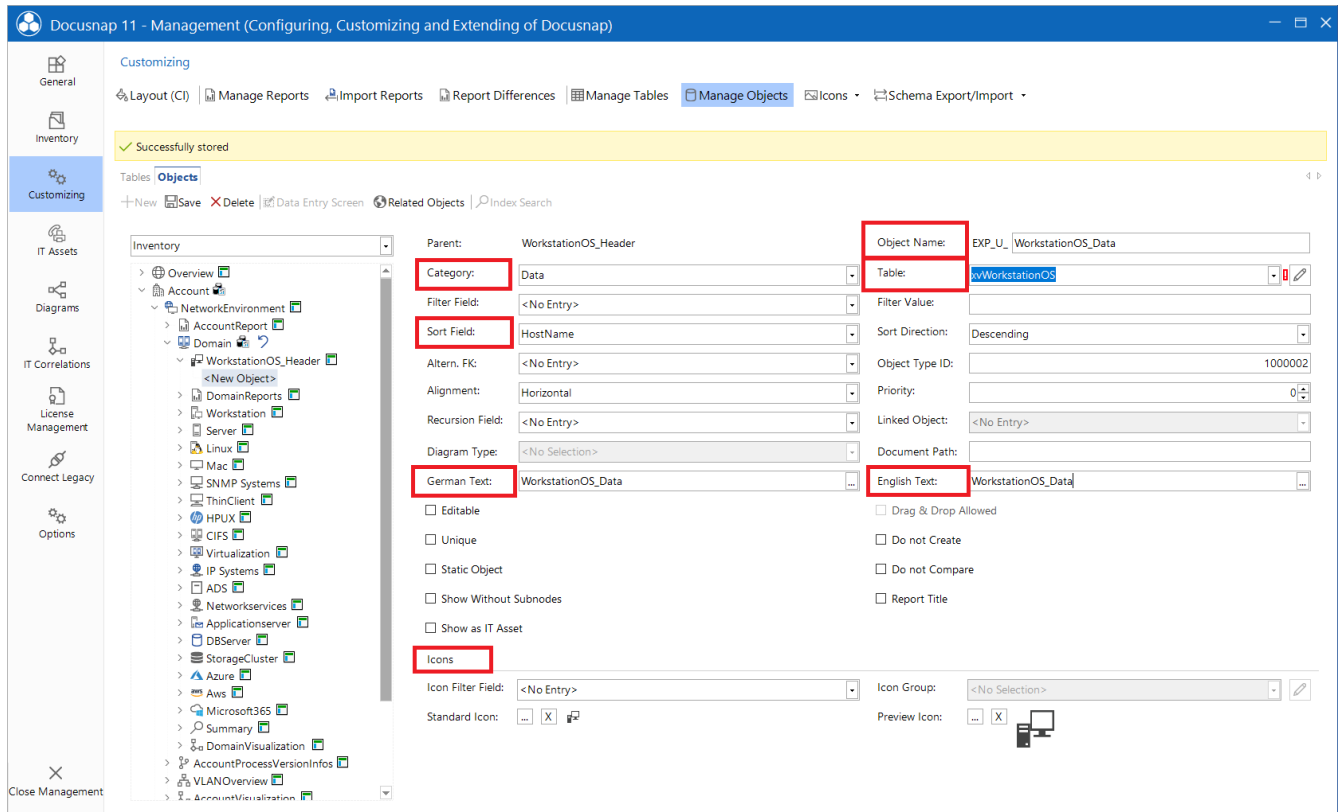


Fig. 8 - Creation of Caption

### 3.3 CREATE DATA OBJECT

In the next step, a new meta object of the type Data is needed.

- For this click on **New**
- Assign an **object name**
- Select **Data** as category
- Store the previously created view as **table: xv...**
- Create a **sort field**
- Assign a **German and English text** as well as icons again



The screenshot shows the 'Docusnap 11 - Management (Configuring, Customizing and Extending of Docusnap)' window. The 'Manage Objects' tab is active, displaying a configuration form for a new object. The left sidebar shows the 'Inventory' tree with 'WorkstationOS\_Header' selected. The main form has the following fields and values:

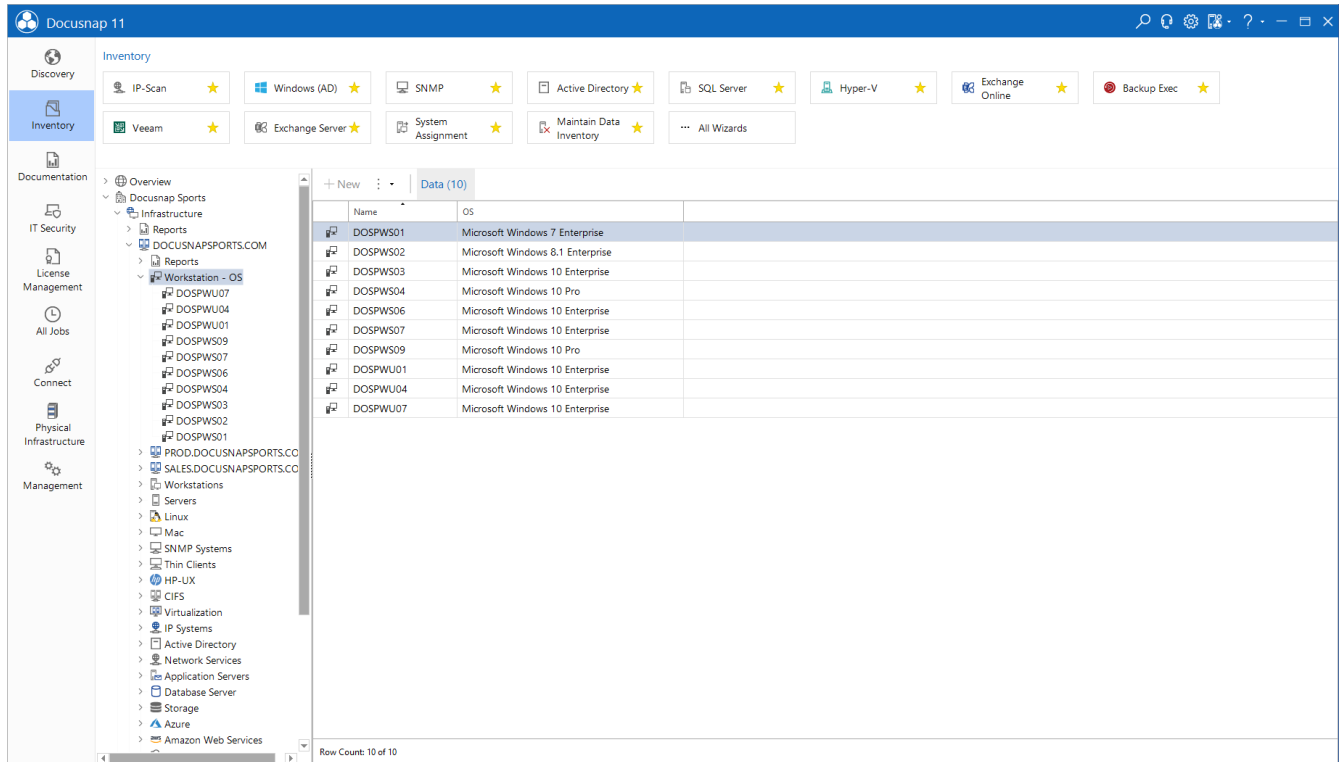
- Parent:** WorkstationOS\_Header
- Object Name:** EXP\_U\_ WorkstationOS\_Data
- Category:** Data
- Table:** xvWorkstationOS
- Filter Field:** <No Entry>
- Filter Value:**
- Sort Field:** HostName
- Sort Direction:** Descending
- Altern. FK:** <No Entry>
- Object Type ID:** 1000002
- Alignment:** Horizontal
- Priority:** 0
- Recursion Field:** <No Entry>
- Linked Object:** <No Entry>
- Diagram Type:** <No Selection>
- Document Path:**
- German Text:** WorkstationOS\_Data
- English Text:** WorkstationOS\_Data
- Icons:** (checked)
- Icon Filter Field:** <No Entry>
- Icon Group:** <No Selection>
- Standard Icon:** (selected)
- Preview Icon:** (selected)

Below the main form, there are several checkboxes: Editable, Unique, Static Object, Show Without Subnodes, Show as IT Asset, Drag & Drop Allowed, Do not Create, Do not Compare, and Report Title. The 'Inventory' tree on the left shows a hierarchy starting with 'Overview', 'Account', 'NetworkEnvironment', 'Domain', and 'WorkstationOS\_Header'.

Fig. 9 - Creation of the data object

### 3.4 RESULT OF THE ADJUSTMENT

There is now a new object in the tree structure, which displays a list of workstations and the respective operating system.



The screenshot shows the Docusnap 11 interface. On the left is a navigation tree with categories like Discovery, Inventory, Documentation, IT Security, License Management, All Jobs, Connect, Physical Infrastructure, and Management. The 'Inventory' section is expanded, showing a list of workstations under 'Workstation - OS'. The main pane displays a table with 10 rows of data.

Name	OS
DOSPWS01	Microsoft Windows 7 Enterprise
DOSPWS02	Microsoft Windows 8.1 Enterprise
DOSPWS03	Microsoft Windows 10 Enterprise
DOSPWS04	Microsoft Windows 10 Pro
DOSPWS06	Microsoft Windows 10 Enterprise
DOSPWS07	Microsoft Windows 10 Enterprise
DOSPWS09	Microsoft Windows 10 Pro
DOSPWS01	Microsoft Windows 10 Enterprise
DOSPWS04	Microsoft Windows 10 Enterprise
DOSPWS07	Microsoft Windows 10 Enterprise

Row Count: 10 of 10

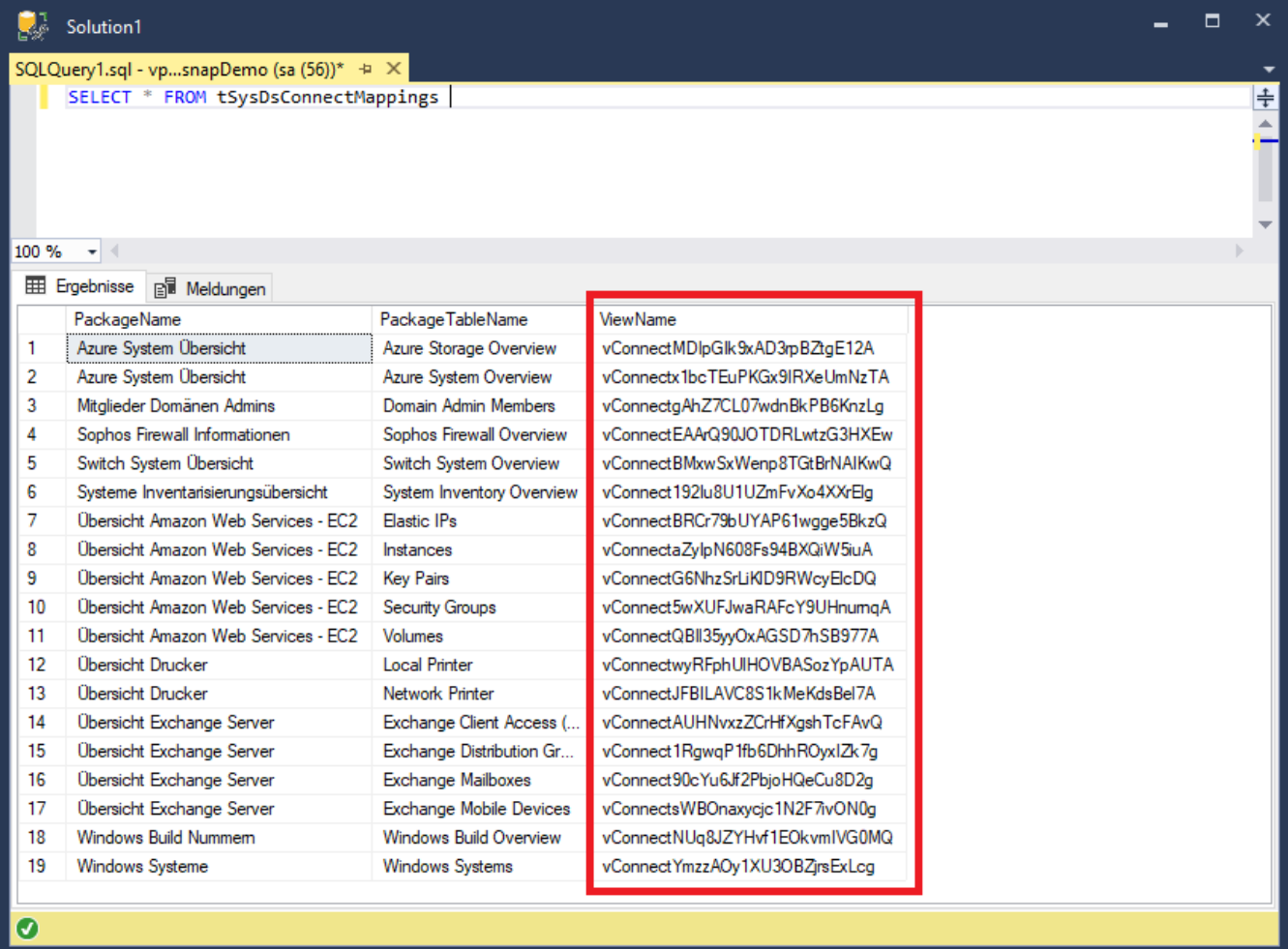
Fig. 10 - Result of the adjustment

The result of a self-created view can also be filtered or exported to an Excel file.

## 4. FURTHER TOPICS

### 4.1 OFFER OF VIEWNAMES

As already described in the introduction, individual requirements can also be easily implemented using Docusnap Connect. Additionally, it is possible to view the previously created Connect packages via the table `tSysDsConnectMappings`, so that the corresponding name of the Connect package can be used for a view, for example.



SQLQuery1.sql - vp...snapDemo (sa (56))\*

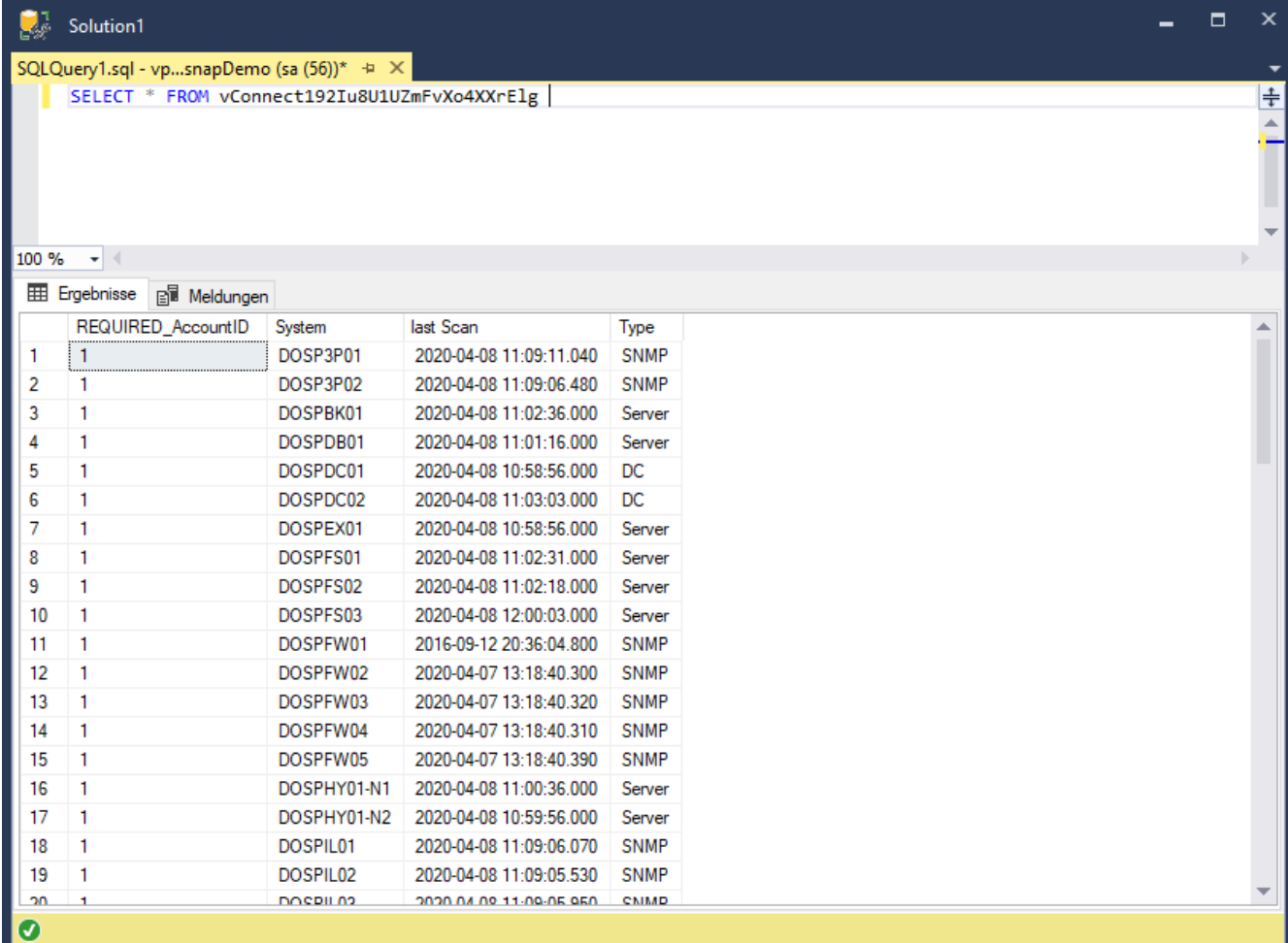
```
SELECT * FROM tSysDsConnectMappings
```

	PackageName	PackageTableName	ViewName
1	Azure System Übersicht	Azure Storage Overview	vConnectMDlpGk9xAD3pBZgE12A
2	Azure System Übersicht	Azure System Overview	vConnectx1bcTEuPKGx9lRXeUmNzTA
3	Mitglieder Domänen Admins	Domain Admin Members	vConnectgAhZ7CL07wdnBkPB6KnzLg
4	Sophos Firewall Informationen	Sophos Firewall Overview	vConnectEAArQ90JOTDRLwtzG3HXEw
5	Switch System Übersicht	Switch System Overview	vConnectBMxwSxWenp8TGtBrNAIKwQ
6	Systeme Inventarisierungsübersicht	System Inventory Overview	vConnect192lu8U1UZmFvXo4XXrElg
7	Übersicht Amazon Web Services - EC2	Elastic IPs	vConnectBRCr79bUYAP61wgge5BkzQ
8	Übersicht Amazon Web Services - EC2	Instances	vConnectaZylpN608Fs94BXQiW5iuA
9	Übersicht Amazon Web Services - EC2	Key Pairs	vConnectG6NhzSrLiKD9RWcyElcDQ
10	Übersicht Amazon Web Services - EC2	Security Groups	vConnect5wXUFJwaRAFcY9UHnumqA
11	Übersicht Amazon Web Services - EC2	Volumes	vConnectQBII35yyOxAGSD7hSB977A
12	Übersicht Drucker	Local Printer	vConnectwyRFphUIHOVBASozYpAUTA
13	Übersicht Drucker	Network Printer	vConnectJFBILAVC8S1kMeKdsBel7A
14	Übersicht Exchange Server	Exchange Client Access (...)	vConnectAUHNvxzZCrHfXgshTcFAvQ
15	Übersicht Exchange Server	Exchange Distribution Gr...	vConnect1RgwqP1fb6DhhROyxIzk7g
16	Übersicht Exchange Server	Exchange Mailboxes	vConnect90cYu6Jf2PbjoHQeCu8D2g
17	Übersicht Exchange Server	Exchange Mobile Devices	vConnectsWBOnaxycjc1N2F7ivON0g
18	Windows Build Nummern	Windows Build Overview	vConnectNUq8JZYHvf1EOkvmIVG0MQ
19	Windows Systeme	Windows Systems	vConnectYmzzAOy1XU30BZjrsExLcg

Fig. 11 - Table with Connect Packages



The view name can be used to list the content of the Connect package and to edit or extend it at any time.



SQLQuery1.sql - vp...snapDemo (sa (56))\*

`SELECT * FROM vConnect192Iu8U1UZmFvXo4XXrElg`

100 %

Ergebnisse Meldungen

	REQUIRED_AccountID	System	last Scan	Type
1	1	DOSP3P01	2020-04-08 11:09:11.040	SNMP
2	1	DOSP3P02	2020-04-08 11:09:06.480	SNMP
3	1	DOSPBK01	2020-04-08 11:02:36.000	Server
4	1	DOSPDB01	2020-04-08 11:01:16.000	Server
5	1	DOSPDC01	2020-04-08 10:58:56.000	DC
6	1	DOSPDC02	2020-04-08 11:03:03.000	DC
7	1	DOSPEX01	2020-04-08 10:58:56.000	Server
8	1	DOSPFS01	2020-04-08 11:02:31.000	Server
9	1	DOSPFS02	2020-04-08 11:02:18.000	Server
10	1	DOSPFS03	2020-04-08 12:00:03.000	Server
11	1	DOSPFW01	2016-09-12 20:36:04.800	SNMP
12	1	DOSPFW02	2020-04-07 13:18:40.300	SNMP
13	1	DOSPFW03	2020-04-07 13:18:40.320	SNMP
14	1	DOSPFW04	2020-04-07 13:18:40.310	SNMP
15	1	DOSPFW05	2020-04-07 13:18:40.390	SNMP
16	1	DOSPHY01-N1	2020-04-08 11:00:36.000	Server
17	1	DOSPHY01-N2	2020-04-08 10:59:56.000	Server
18	1	DOSPIL01	2020-04-08 11:09:06.070	SNMP
19	1	DOSPIL02	2020-04-08 11:09:05.530	SNMP
20	1	DOSPIL02	2020-04-08 11:09:05.950	SNMP

Fig. 12 - Table with Connect Packages

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## VERSION HISTORY

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Date	Description
April 29, 2020	Version 2.0 - Revision of the HowTos for Docusnap 11
November 4, 2021	Version 2.1 - Adjusted Screenshots

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