



## User System Assignment (Assets User)

Creating Reports on User Assets and Systems

<b>TITLE</b>	User System Assignment (Assets User)
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## 1. Introduction

Docusnap enables you to assign inventoried systems and assets to users. To give you an overview of which assets have been assigned to a particular user, two more reports have been added to Docusnap.

In addition, systems that were inventoried automatically by Docusnap (e.g. Windows notebooks), but also any other IT assets (e.g. mobile phones), can optionally be assigned to ADS users. This data is used by the report described here to provide a list of assets for one or more ADS users.

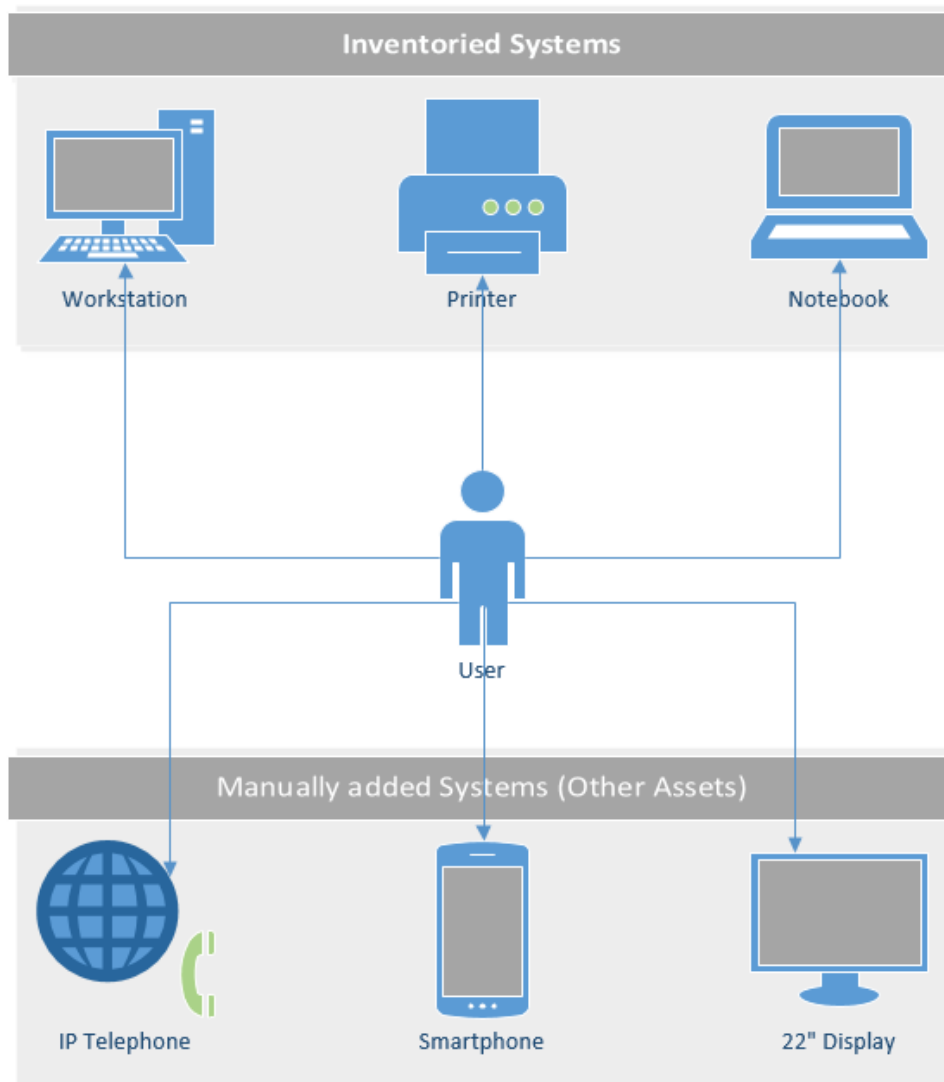


Fig. 1 – Schematic representation of a user and his / her assets

## 2. Assigning Automatically Inventoried Systems to an ADS User

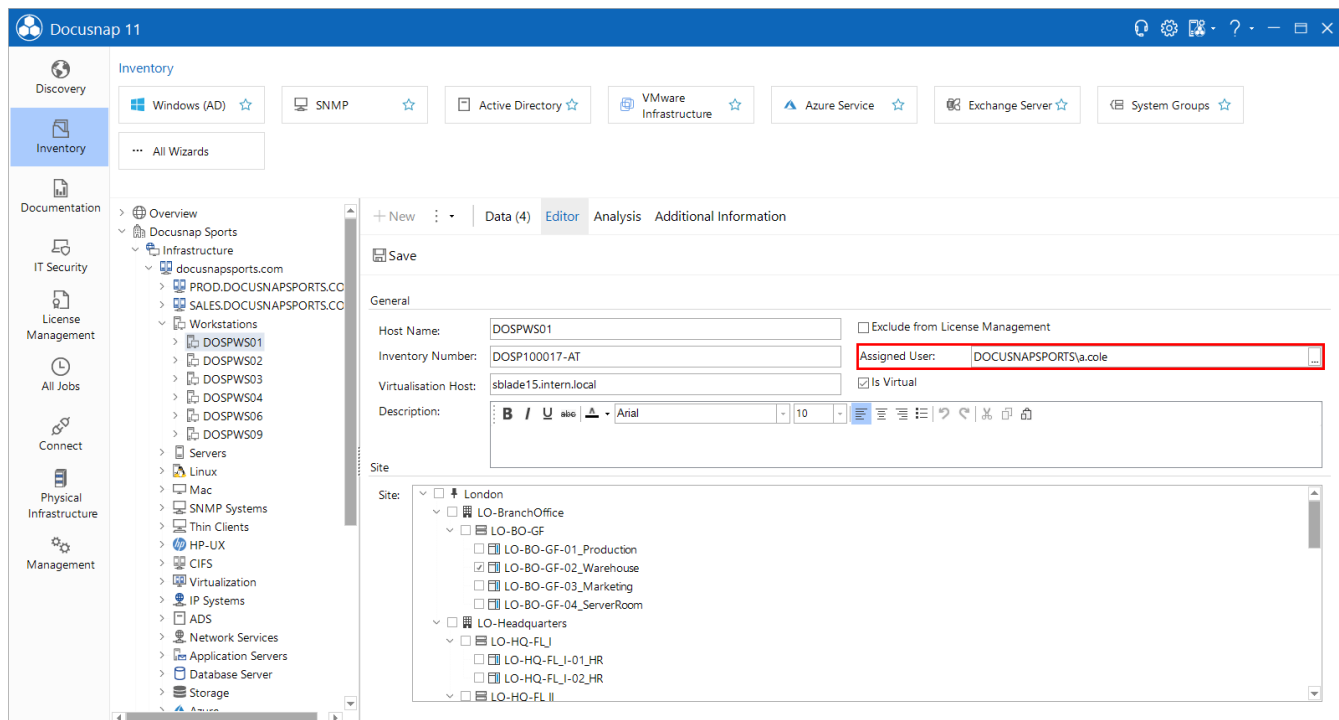


Fig. 2 – Assigning automatically recorded systems to an ADS user

You can enter additional information that is relevant to the system in its editor panel. Besides details on the location (site) or inventory number, the system also accepts the name of an ADS user.

Example: Workstation **DOSPWS01** was assigned to the ADS user **A. Cole** in the editor.

### 3. Adding User Information to IT Assets

Since IT assets are freely definable, it cannot be assumed that an ADS user data field exists by default. Creating and maintaining Docusnap IT assets is a highly complex topic. It is covered in a separate functional description and in a comprehensive HowTo document:

- HowTo – Other Assets
- IT Assets Online User Manual

#### 3.1 Cloning the Existing iPhone Class

In this example, the existing class IT Systems - Mobile Phones - Apple - iPhone will be cloned using the Clone Class feature which is available in the Docusnap Management - IT Assets - Manage IT Assets.

In addition, we will adapt the German and English texts (iPhone with user assignment).

This action could also be skipped. The predefined Asset Classes can also be extended with additional properties.

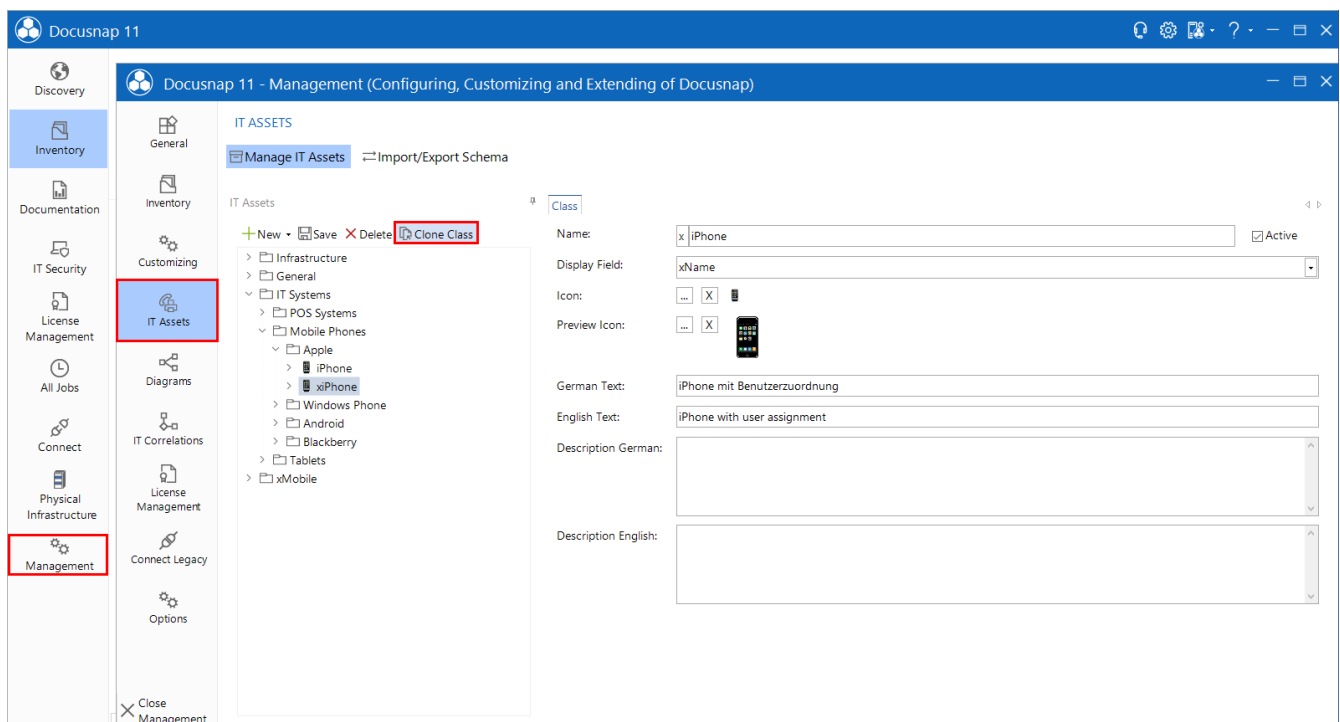


Fig. 3 – Cloning the existing iPhone class

## 3.2 Adding a User/Group Selection to the xiPhone Class

- Navigate to the newly created xiPhone class
- Select xiPhone - General - right-click xGeneral - Create Property
- Create the ADS User data field as **Type User/Group Selection** (as shown in the screenshot below)

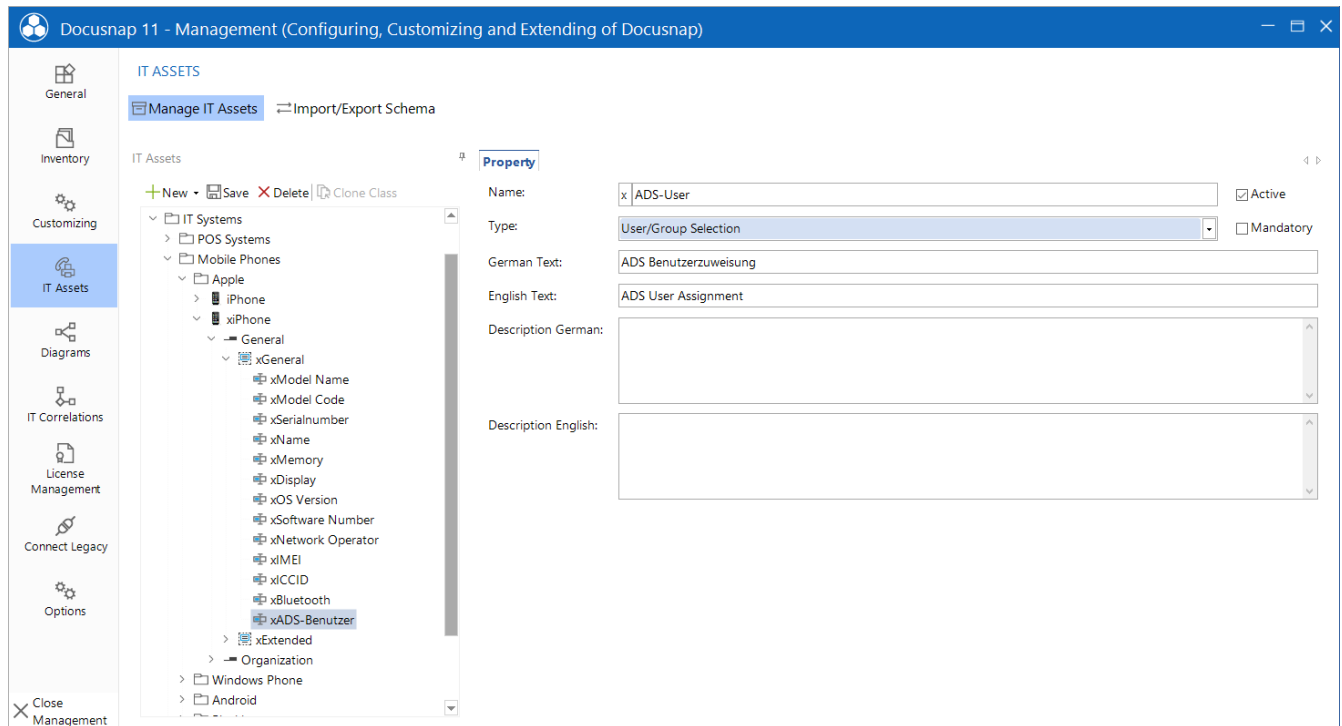


Fig. 4 – Creating the ADS User data field

Now, you can create new IT assets of the xiPhone type and assign these mobile phones to ADS users.

### 3.3 Creating a New IT Asset of the xiPhone Class – Creating a Mobile\_Devices Folder

In the first step, navigate to the Inventory area, click the company, and go to Assets - Other Assets. Then, right-click Other Assets to create a new folder called Mobile\_Devices.

Right-click on the created folder to navigate to the previously created class iPhone - with user assignment and create the IT asset and enter the required values.

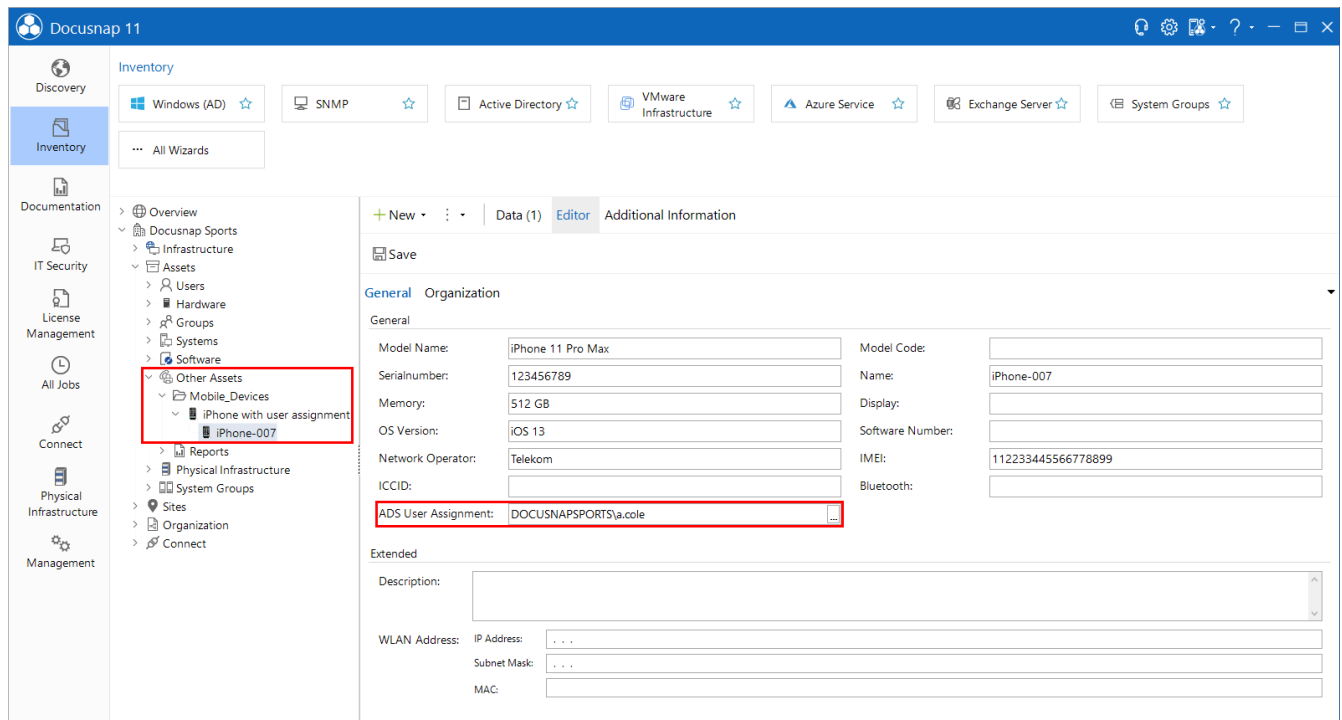


Fig. 5 – Creating a new iPhone



## 4. Creating the User System Assignment Report

Under Infrastructure - Reports - Infrastructure, there are two variants of the report: Assets User and Assets User - Excel. Before Docusnap creates the actual report, a dialog appears that enables you to select one or more ADS users for output.

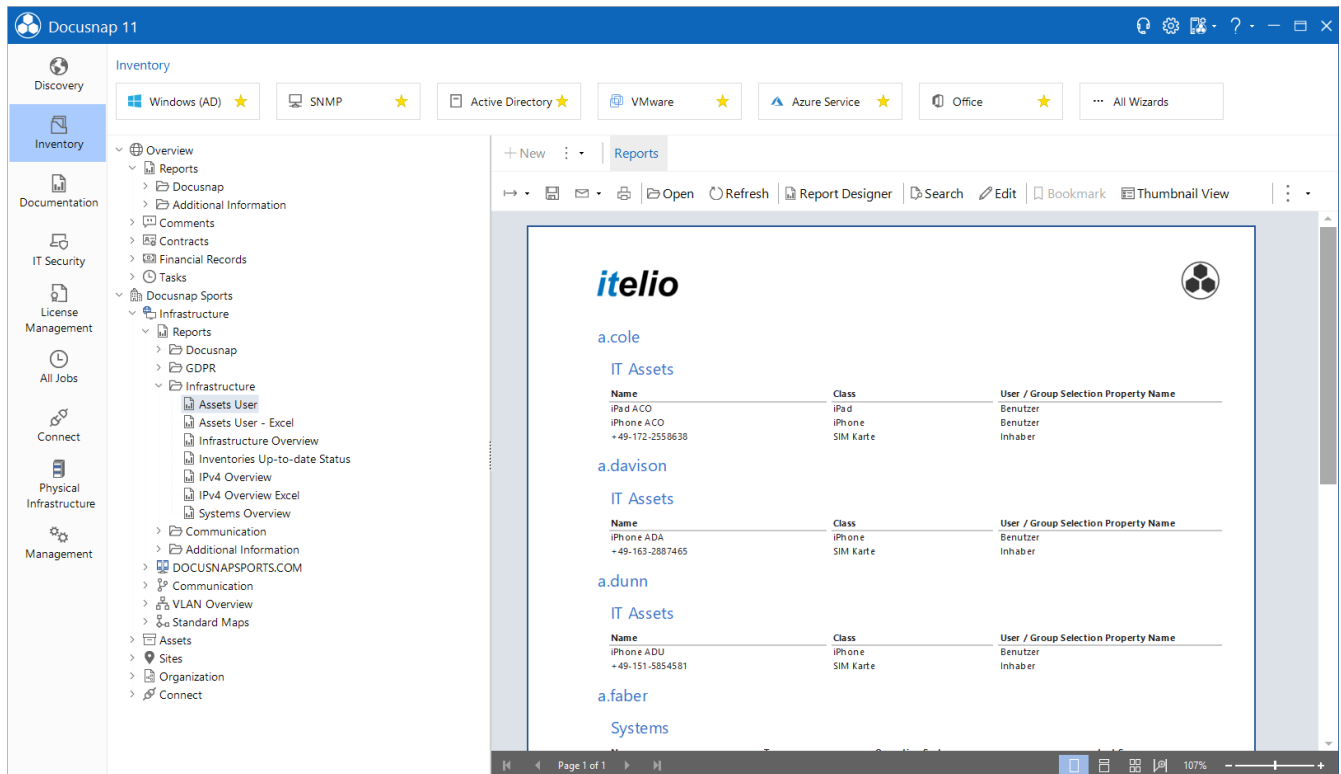


Fig. 6 – Creating the report

This satisfies the requirement, i.e. Docusnap is now able to generate this type of report as desired. If required, you can schedule the creation of these reports, which can be sent out automatically by e-mail in multiple output formats.

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## VERSION HISTORY

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Date	Description
December 06, 2017	Initial version
October 24, 2018	Screenshots adapted
April 27, 2020	Version 2.0 - Revision of the HowTos for Docusnap 11

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