Docusnap 12

New features, changes, and upgrade of Docusnap 12

TITLE	Docusnap 12
AUTHOR	Docusnap Consulting
DATE	12/20/2022
VERSION	1.0 | valid from 12/14/2022

This document contains proprietary information and may not be reproduced in any form or parts whatsoever, nor may be used by or its contents divulged to third parties without written permission of Docusnap GmbH. All rights reserved.

CONTENTS

1. Introduction 4
2. Perform Upgrade 6
3. Cloud Infrastructure 8
4. Microsoft 365 Inventory 9
5. Date of initial recording of systems and applications – First Record 11
6. Customizing – Namespaces 12
7. Distribute and update script files / inventory modules via DDS. 13
8. Scheduled CSV import 14
9. Changes in the automatic site assignment 14
10. Changes in DNS and DHCP inventory 15

1. Introduction

With the release of Docusnap 12, some new features and changes are introduced to Docusnap. This document is intended to present these new features and changes. It also describes how to upgrade from Docusnap 11 to Docusnap 12.

With Docusnap 12, .Net Framework version 4.8 or higher is mandatory. This applies to the Docusnap Client systems, the Docusnap Server and the systems the Docusnap Discovery Service is installed on!

When you run the Docusnap 12 setup, .Net Framework version 4.8.1 is automatically installed. However, the update of .Net on the DDS systems cannot/will not take place automatically, as this "only" exchanges files and does not perform an installation routine. If you run the setup of the DDS again, .Net Framework version 4.8.1 will also be installed. The setup file can be found in the installation directory: C:\Program Files\Docusnap 12\Setup

With Docusnap 12, systems are now automatically moved between sites. This means that systems are assigned to another location, even if you have assigned this system to a room, etc. The movement of systems between the sites is carried out using assignment criteria and inventory via Docusnap Discovery Services. Further information can be found in the chapter – Changes in the automatic site assignment.

Cloud inventories (Azure, Office365, AWS and Exchange Online) can now be stored in a new node within the tree structure – cloud infrastructure. This node is located directly below the company. The data of the already inventoried cloud environments are **not** automatically found there. New inventory orders must be scheduled.

There are new features in DNS and DHCP inventory. As a result of these changes, the DHCP and DNS services must be running at least on systems running the Windows Server 2012 operating system.

Innovations

- New node in the tree structure – cloud infrastructure
- Microsoft 365 Inventory
  - Azure Active Directory
  - Exchange Online
  - Office365 / Microsoft 365 (licensing and usage)
  - OneDrive
  - SharePoint Online
  - Teams
- The date of the first inventory is now recorded
- Namespaces for Customizing – Targeted Export of Customizing
- Script files used by DDS are now updated in the application directory
- Scheduled CSV-Import

Changes

- .Net Framework 4.8 or higher is mandatory
- Changes to Automatic Site Assignment
  - Systems that have already been assigned to a site can now be automatically reassigned
- DNS
  - DNS servers must be running at least Windows Server 2012
  - New data is inventoried
  - New reports are available
- DHCP
  - DHCP servers must be running at least Windows Server 2012
  - New data is inventoried
  - New reports are available

Upgrade

1. Active service contract / rental available
2. Install .Net Framework 4.8 or higher on all participating Docusnap systems
   Docusnap Server, Docusnap Client Systems, Docusnap DDS Systems
3. Start upgrade on the Docusnap server
   Download setup file – Run – Install
4. Customize links with central configuration file -UseConfig
   Program path to Docusnap.exe is now ...\Docusnap 12\...
5. Perform database update
   Check in advance when the last database backup was performed
6. Exchange used script files / adjust share path
   DocusnapScript.exe, DocusnapExchange13.exe, Scan-ADDS/DNS/DHCP.exe etc.
7. Check status and plugin versions of DDS
8. Updating Docusnap Client Systems

2. Perform Upgrade

For the free upgrade to Docusnap 12, an active service contract or rental is required! The existing activation key remains valid.

Check .Net version on DDS systems

The first step is to check that all Docusnap systems involved have .Net Framework 4.8 or higher installed. This applies in particular to the systems that have installed the Docusnap Discovery Service (DDS).

You can check which .Net version is present on the systems as follows:

- Docusnap icon in the title bar – Docusnap Discovery Service Configuration
- Check the existing columns DDS Hostname and .Net Framework Version

When you re-run the Docusnap Discovery Setup from the installation directory (C:\Program Files\Docusnap 12\Setup) on the systems, the DDS is fully updated and .Net Framework version 4.8.1 is also installed. The complete update will also provide the function for storing the inventory modules / script files.

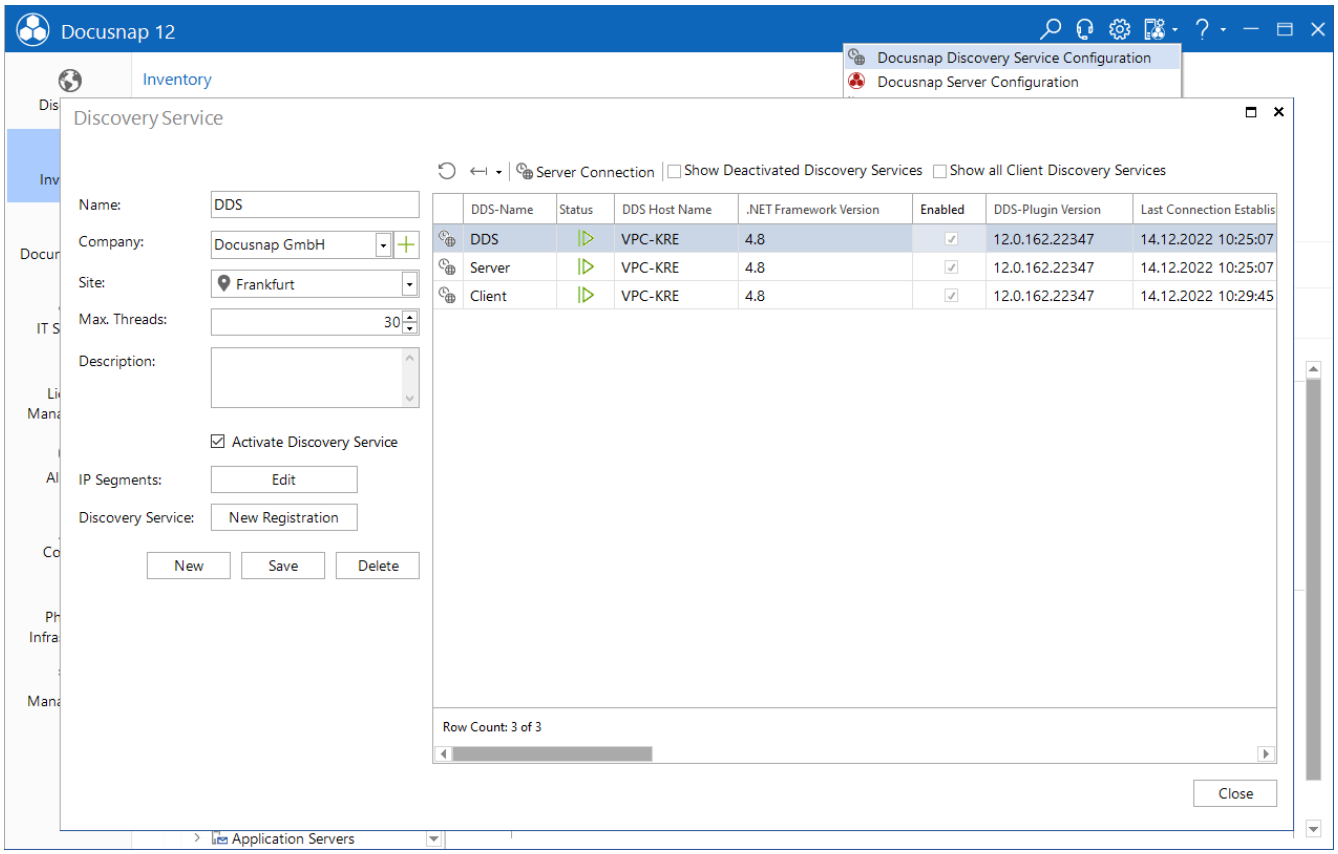

Figure 1 - Checking the .Net version on the DDS systems

Start upgrade on the Docusnap server

The next step is to start the upgrade on the Docusnap Server. To do this, download the setup file from the homepage and run the installation.

Customize the central configuration file (-UseConfig)

If you use a central configuration file where you use the variant with the -UseConfig parameter in the desktop shortcut, it must be adapted. Within the link, adjust the paths for **Target** and **Run in** – Docusnap 11 becomes Docusnap 12.

Check / perform database backup

Before you perform the database upgrade, you should perform a database backup if it does not already exist.

Upgrading the database

If you now start Docusnap, you need to run the database upgrade. If there is still an active connection to the Docusnap database, you will be noticed. Close all Docusnap Client applications and then run the database upgrade. The upgrade on the Docusnap Server is completed now.

Replace used script files / adjust share path

If you perform inventories using one of the script variants, it is now essential to exchange them at their storage location. You should perform this exchange after each update / upgrade of Docusnap.

The script files used are located in the following folders in the Docusnap installation directory:

- C:\Program Files\Docusnap 12\Tools
  - DocusnapScript.exe, DocusnapExchange13.exe, Scan-ADDS/DNS/DHCP.exe

- C:\Program Files\Docusnap 12\Bin
  - DSMac, DSLinux

If you have not saved the script files to a central location, but have directly shared the Bin and/or the Tools folder, the sharing must be adjusted accordingly.

Check status and plugin versions of the DDS

In the course of the upgrade, you should check the plugin versions and the status of the DDS. Please note that updating the DDSs can take up to two hours, depending on the number of DDSs in use and the available bandwidth.

Upgrade Docusnap Client Systems

Now you can perform the upgrade on the remaining client systems. When Docusnap is started there, the message that an update is available appears automatically.

3. Cloud Infrastructure

If you are doing a previous cloud inventory in Docusnap, the information can be found below your domain. In Docusnap 12, there is now a Cloud Infrastructure in addition to the Infrastructure.

Here, the infrastructure primarily maps the OnPremise environment and the cloud infrastructure maps the cloud services.

In order for the inventoried cloud data to end up in the cloud infrastructure, the new inventory wizards must be used:

- Microsoft 365
- Azure Service
- AWS

The permissions, or the app created for Azure inventory as well as the policies created for AWS inventory can still be used.

The old cloud services inventory wizards are now designated as legacy. If the inventories continue to be performed using them, then the data will also continue to be found under the domain. The inventory jobs that have already been scheduled do not need to be adjusted:

- Exchange Online
- Azure Service - Legacy
- AWS – Legacy
- Office 365 – Legacy

Exchange Online takes a special role here. The existing wizard has not been designated as legacy. However, the inventoried data is still stored under the domain. Further, data that is not inventoried via Microsoft 365 is inventoried via this wizard:

- Permissions
- Public folders
- Mobile Devices

4. Microsoft 365 Inventory

With Microsoft 365 inventory, the following cloud services are combined in one inventory wizard:

- Azure Active Directory
- Exchange Online
- Microsoft 365 / Office365 (licensing and usage)
- OneDrive
- SharePoint Online
- Teams

The Microsoft 365 inventory requires an Azure app. This forms the interface between Docusnap of Microsoft 365. As you already know it from Exchange Online inventory, the required app is simply created from Docusnap. The prerequisites for creation are:

- The user used must be a Global Administrator
  - Only necessary for the creation of the app
  - The app to be created will not have this permission!
- Clear the browser cache before creating the app!
  - Microsoft itself uses Internet Explorer for part of the app creation. Therefore, it is important to clear the cache of as many browsers as possible (at least Default Browser and Internet Explorer) before creating the app.
- Internet Explorer security settings - the Internet zone should be set to "medium to high"

The following also applies to the creation of the app:

- The Azure App Name is automatically generated from entering the Azure tenant and the name of the global administrator used
- Azure App generates a key that is valid for two years
- If the Azure App is deleted in Docusnap, the app is not deleted in Azure at the same time

After the inventory, the data is available in the cloud infrastructure.

You can use the inventoried data

- Get an overview of all users with the Microsoft 365 licenses used
- Get a listing of critical roles (such as global administrators) in Azure Active Directory
- Check for teams that are no longer active or for users' memberships to teams
  - thus "grown team structures" can be prevented
- Detect OneDrive drives that are reaching their capacity limits
- Analyze the use of SharePoint Online websites

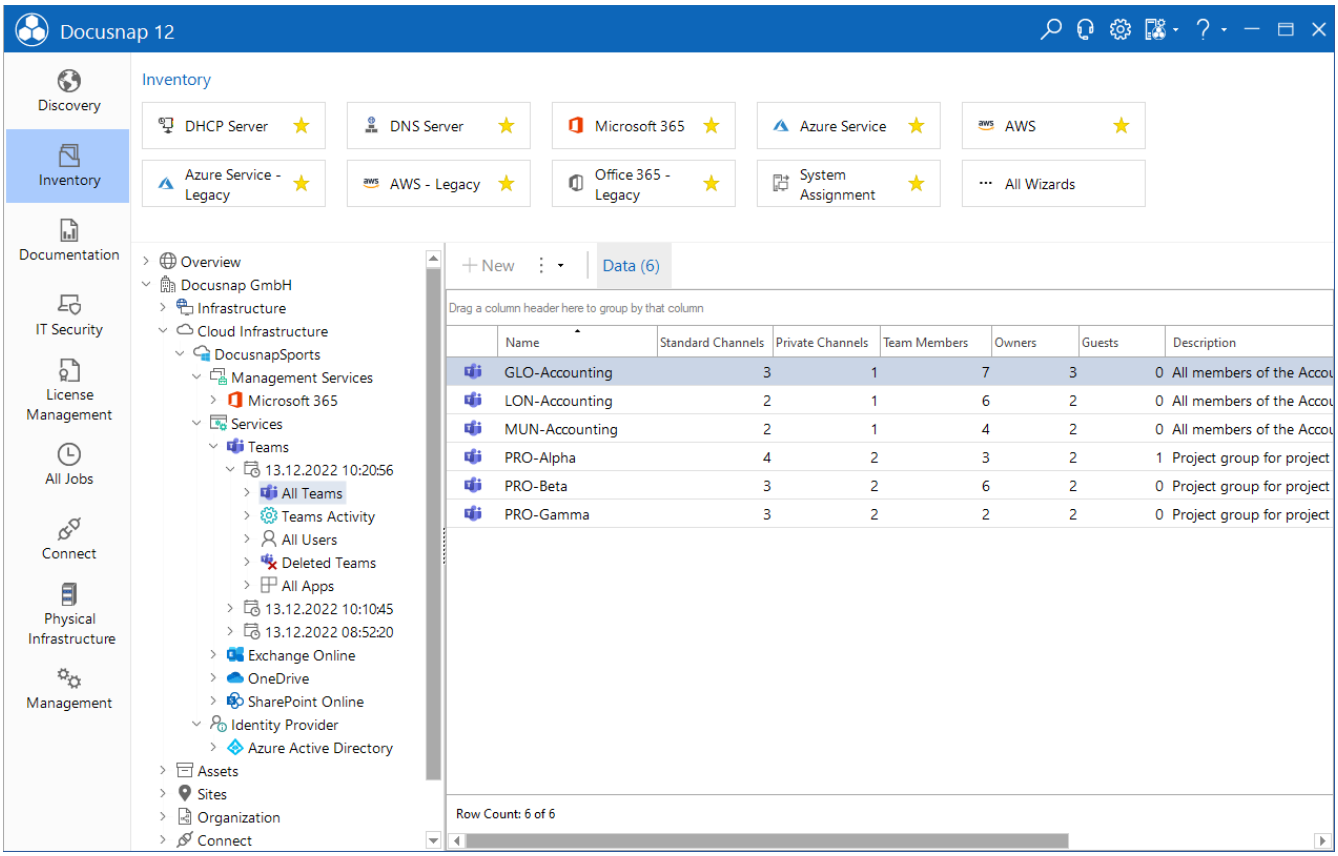

Figure 2 - Micrososft365 Inventory

5. Date of initial recording of systems and applications – First Record

In the course of inventories, except Active Directory and Microsoft 365, the date of the first inventory is now stored.

This makes it possible to see how long a system has been known in Docusnap. Furthermore, queries can be created, for example, with Docusnap Connect about which systems were newly inventoried in the last week.

You can find the First Inventory column in the respective overviews:

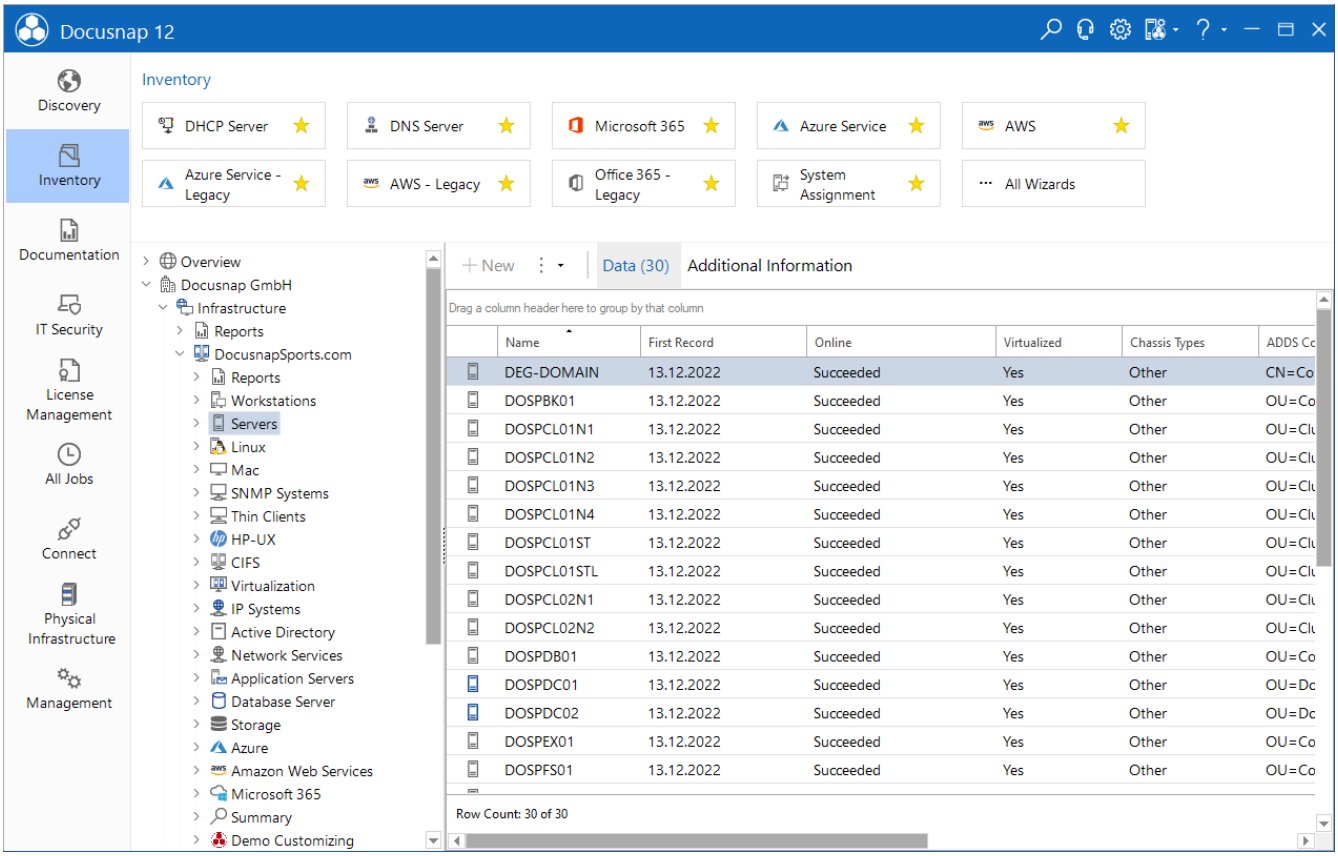

Figure 3 - Initial recording of servers in Docusnap

6. Customizing – Namespaces

Namespaces in customizing mean that each extension of the metaschema (tables, views, data tree objects) can be provided with a namespace.

This way, all objects belonging to a larger customizing can be related to each other. This is especially useful if a specific customizing is to be exported and further customizing exist in this database.

In the course of the export, the specific namespace can now be selected, and the associated tables, views and data tree objects exported.

The namespaces can be specified or selected when creating a new view, table, and meta objects.

- The namespace may have a maximum length of 10 characters
- Special characters, umlauts and spaces are not allowed!

For new tables, views and data tree objects the namespace can be assigned in the properties. For standard tables of Docusnap, the namespace can be specified in the context menu.

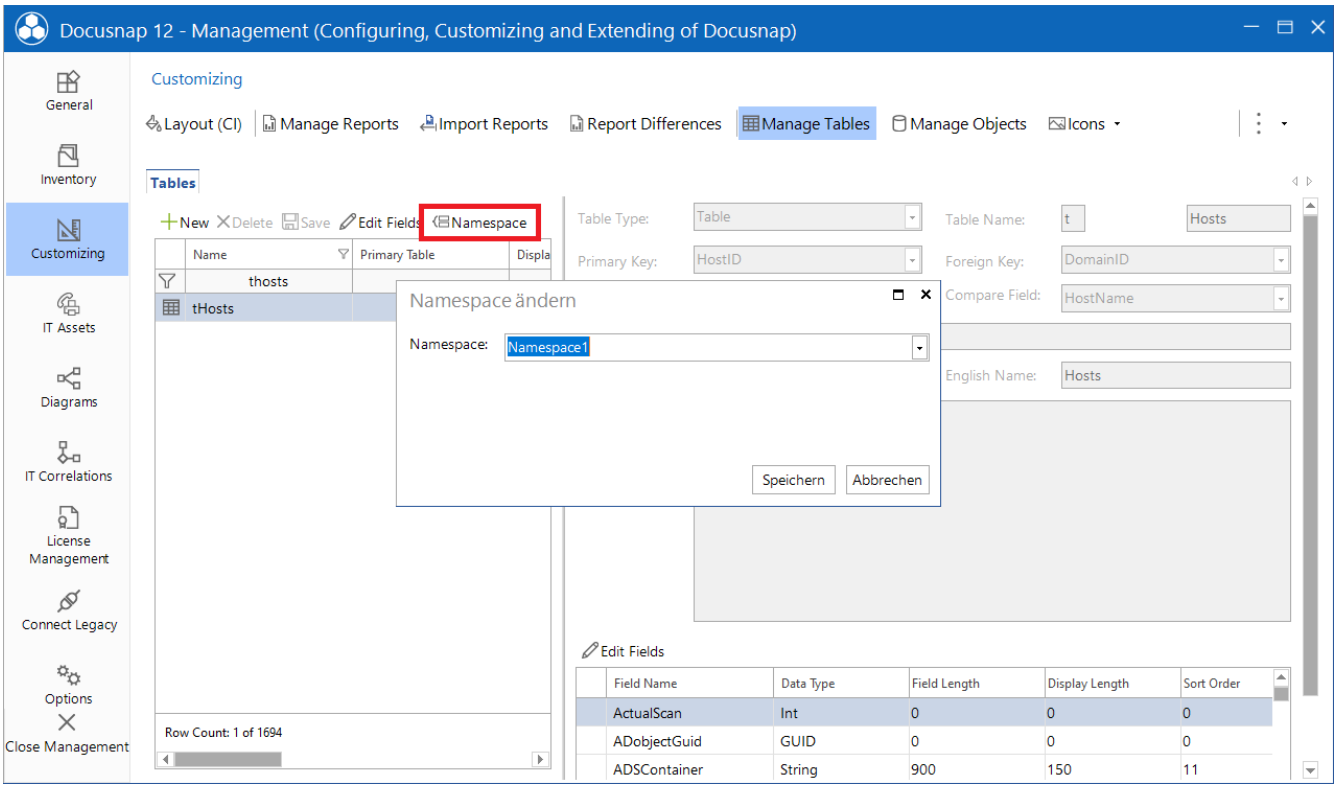

Figure 4 - Default Table Namespaces

7. Distribute and update script files / inventory modules via DDS.

If you are now upgrading Docusnap Discovery Service (DDS) installations to version 12 through the installer, a new option is available: Deploy Inventory Modules.

This option causes that all files needed for the inventory can be stored in this additional folder.

Especially when using the script variants, for example for the Windows inventory, this is an advantage. Thus you can automatically keep the used files up to date.

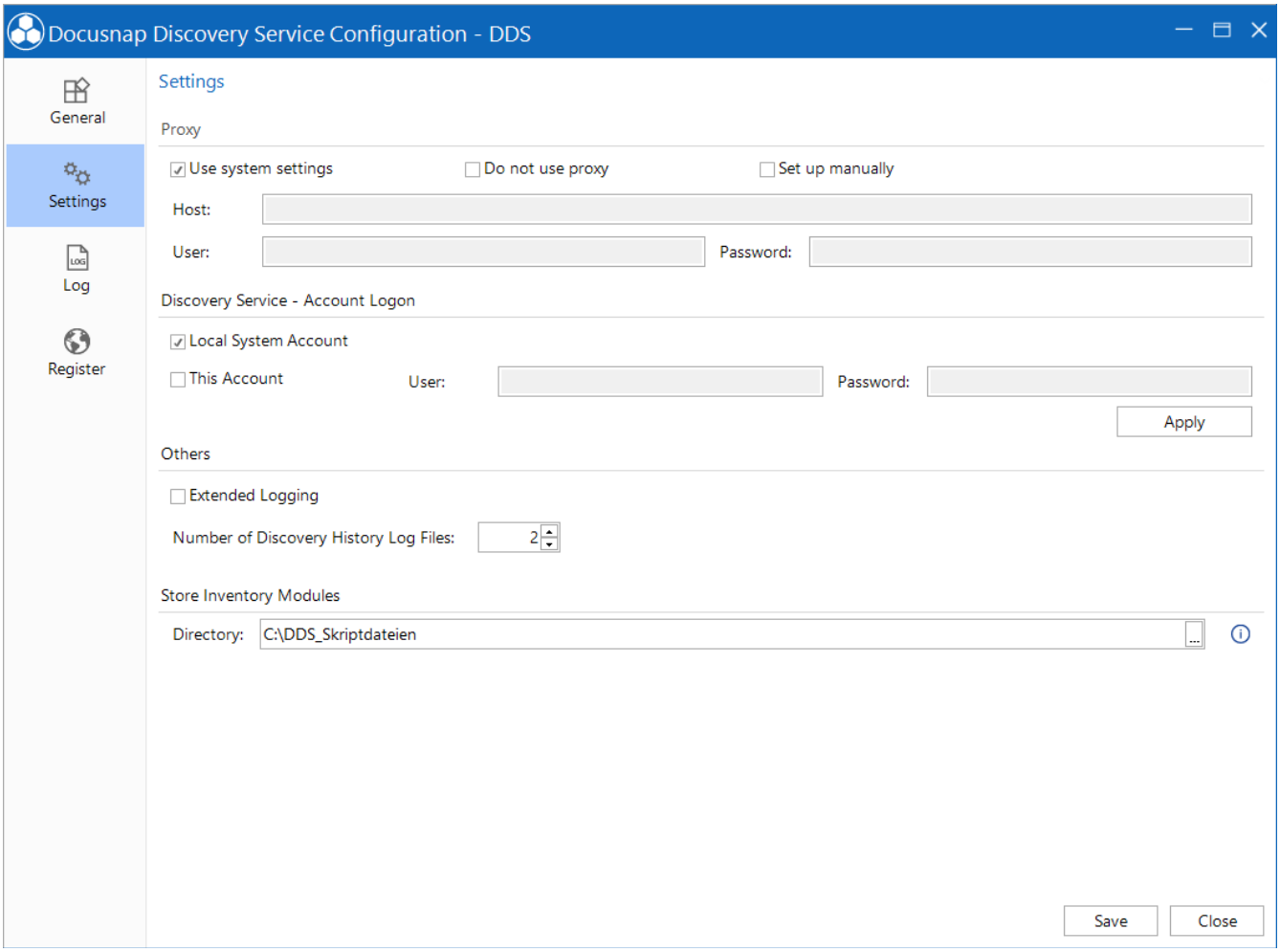

Figure 5 – Store Inventory Modules for the DDS

8. Scheduled CSV import

With Docusnap 12, CSV files can now be imported on a scheduled basis. The already known wizard has been extended with the additional step of scheduling.

You now save the CSV files at the path defined in the job and Docusnap performs the import automatically. The imported CSV file is then moved to a subfolder.

If no new CSV file is stored in the defined path at the time of the CSV import, nothing will be imported. This can be seen in the summary of the job (Successfully completed - no files had to be imported).

A HowTo regarding the CSV import can be found in our Knowledge Base - CSV Import.

9. Changes in the automatic site assignment

Systems can be automatically assigned to a site using assignment criteria (network address, systems name, ADDS container) and inventory via a Docusnap Discovery Services (DDS). Furthermore, this is also possible manually.

Until Docusnap 11, systems were only automatically assigned to a site if they were not yet assigned to a site. The automatic assignment of a system to a site always takes place during the inventory.

With Docusnap 12, you can now decide whether systems should be automatically moved between sites or not.

In the editor of a system you can now define this via the option Automatic site assignment.

By default, the option is active and causes systems to be moved automatically between sites, even if you have manually assigned them to a site.

©2023 Docusnap GmbH – All rights reserved

10. Changes in DNS and DHCP inventory

Changes are made to the inventoried data in both the DNS and DHCP inventories. The inventory itself does not have to be adapted.

It is now assumed that the services are operated on servers with at least the Windows Server 2012 operating system.

In the DNS area, the inventory now serves the following topics:

- Service configuration
- Security settings
- Recursion and forwarding settings
- Static data
- Zone data
    - Primary, secondary, stub, Active Directory integrated, reverse lookup zones.

In the DHCP section, the inventory now provides the following data:

- IPv4 ranges including multicast ranges.
- IPv4 range exclusions
- DHCP clustering
- Policies and classes
- Option definitions
- server configuration
- various statistics functions

For both inventories, the existing reports have been revised. As usual, you can find them directly below the inventory (Your company - Infrastructure - Your domain - Network services - DNS / DHCP).

LIST OF FIGURES

FIGURE 1 - CHECKING THE .NET VERSION ON THE DDS SYSTEMS 6
FIGURE 2 - MICROSOSFT365 INVENTORY 10
FIGURE 3 - INITIAL RECORDING OF SERVERS IN DOCUSNAP 11
FIGURE 4 - DEFAULT TABLE NAMESPACES 12
FIGURE 5 – STORE INVENTORY MODULES FOR THE DDS 13

VERSION HISTORY

Date	Description
12/14/2022	HowTo created

© Docusnap GmbH - www.docusnap.com