



Docusnap 13

New features, changes, and upgrade of Docusnap 13

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1. Introduction

The Docusnap 13 release introduces a number of new features and changes to Docusnap. This document is intended to give you an overview of the new features and changes. It also describes how to upgrade from Docusnap 12 to Docusnap 13.

As of Docusnap 12, .Net Framework version 4.8 or higher is required. This applies to the Docusnap client systems, the Docusnap server and the systems on which the Docusnap Discovery Service (DDS) is installed!

When Docusnap 13 is installed, the .Net Framework version 4.8 is automatically installed. However, updating .Net on the DDS systems cannot/will not be automatic, as "only" files are exchanged here and no installation routine is performed. If you run the DDS setup again, the .Net Framework version 4.8 will also be installed. The installation file is located in the installation directory: C:\Program Files\Docusnap 12\Setup.

What's New

- Docusnap Connect
 - Connect queries can now be sent via email
- Objects in the tree structure can be hidden
- Active Directory – hierarchical group resolution in the tree structure

Changes

- Exchange Inventory by Script
 - Do not perform a prior "empty" Exchange inventory
 - **Customization required!**
- DFS Inventory
 - Script variant now available
 - Inventory Changes
 - **Customization required!**
- Veeam Inventory
 - Script variant now available
 - Inventory Changes
 - **Customization required!**
- Uniform naming and filing of all script variants
 - All script variants available for inventory are now stored in the Tools folder
 - In addition, they now have a uniform designation
 - **Customization required!**

Upgrade

1. Active service contract / rental available
2. Install .Net Framework 4.8 or later on all participating Docusnap systems
Docusnap Server, Docusnap Client Systems, DDS Systems
3. Start the upgrade on the Docusnap server
[Download the installation file](#) – run it – perform the installation
4. Customizing Shortcuts with Central Configuration File -UseConfig
5. Program path to Docusnap.exe is now ...\\Docusnap 13\\...
6. Perform database updateCheck beforehand when the last database backup was performed!
7. Replace Used Script Files / Adjust Share Path
8. Check the status and plugin versions of the DDS
9. Updating Docusnap Client Systems

2. Perform upgrade

To upgrade to Docusnap 13 for free, an active service or rental contract is required! Existing activation keys remain valid. [Here you can download Docusnap 13](#).

Start the upgrade on the server

The first step is to start the upgrade on the Docusnap server. To do this, download the setup file from the homepage and perform the installation.

Customize Central Configuration File (-UseConfig)

If you are using a central configuration file that uses the variant with the -UseConfig parameter in the desktop shortcut, it will need to be customized. In the shortcut, adjust the paths for Target and Run in - Docusnap 12 becomes Docusnap 13.

Check/perform database backup

Before you perform the database upgrade, you should perform a database backup if you haven't already done so.

Perform a database upgrade

When you start Docusnap after upgrading, Docusnap will prompt you to update the database. If there is still an active connection to the Docusnap database, this will be displayed. Close all Docusnap client applications and then perform the database upgrade. The upgrade on the Docusnap Server is complete.

Replace Used Script Files / Adjust Share Path

If you are performing inventories with one of the script variants, it is now imperative that you replace them in their storage location. This replacement should be done after every update/upgrade of Docusnap.

If you didn't save the script files in a central location, but shared the Bin folder and/or Tools directly, you'll need to adjust the sharing accordingly.

As of Docusnap 13, all script files are located in the Tools folder. Further information can be found in the chapter – Uniform naming and filing of all script variants:

C:\Program Files\Docusnap 13\Tools

Check the status and plugin versions of the DDS

As part of the upgrade, you should check the plugin versions or the status of the DDS. Please note that it may take up to two hours to update the DDS. This depends on the bandwidth and its utilization.

Update of Docusnap client systems

Now you can upgrade to the rest of the client systems. When Docusnap is started there, the message that an update is available automatically appears. -> Proceed as described!

3. Send Docusnap Connect queries by e-mail

With Docusnap Connect, you can create your own queries on the information available in Docusnap. You can use these queries for further evaluations in Docusnap itself.

In addition to being used in Docusnap, the processed data can also be exported. For example, you can use the information available in Docusnap in third-party products. The export can be done both automatically and time-controlled.

If you have the export run automatically and time-controlled, Docusnap 13 now allows you to send the query results by e-mail. The already familiar wizard, which allows you to plan the Connect packages, has been extended to include the additional step of mail distribution.

Requirements for mail distribution:

- Mail distribution supports XML, Excel and CSV formats
- Mail distribution can only be performed for scheduled jobs
- The Docusnap server must be configured to send mails ([Server Mail Settings](#))

4. Hide objects in the tree structure

With Docusnap 13 it is now possible to hide unnecessary objects in the tree structure. These settings are user-specific and can be set individually for each user who launches Docusnap.

Objects hidden in the Docusnap Client will then also be hidden in Docusnap Web. The prerequisite for this is that you have activated [user management](#) and that [Docusnap Web is not running anonymously](#).

Under Infrastructure - Your Domain, you'll find the objects that represent each inventory that can be performed with Docusnap. If you don't have some of these inventoriable systems, services, or applications in use, you can now hide them. Of course, you can also hide all other objects. You can hide objects in the following ways

- Select the parent object you want to hide - for example, your domain.
- Right click
- **Hide Meta Objects**
- Selection of which objects should be hidden (check box)

If you want to unhide hidden objects, you can do so in the same way as described above.

In addition, you can also unhide all meta objects:

- To do this, select an object in the tree structure again with the right mouse button.
- Select **Show all meta objects again**.

In the Overview - Reports - Docusnap section, you will find the Hidden Object Types - All Users report. For all users who have hidden objects, this lists a corresponding overview of which objects have been hidden.

5. Active Directory – hierarchical group resolution in the tree structure

With Docusnap 13, group memberships and group members are now resolved hierarchically in the tree structure within the Active Directory inventory. This means that not only the direct, but also the indirect memberships and members can now be displayed in the tree structure.

The new features are as follows:

- Your Company – Infrastructure – Domain – Active Directory – Scan Date – User
 - All Group Memberships
 - Direct Group Memberships
- Your Company - Infrastructure - Domain - Active Directory - Scan Date - Groups
 - All group members
 - All Group Memberships
 - Direct group members
 - Direct Group Memberships
- Your Company – Infrastructure – Domain – Active Directory – Scan Date – Computer
 - All Group Memberships
 - Direct Group Memberships

6. Changes to Exchange Inventory by Script

If Exchange inventory is scripted, an "empty" Exchange inventory must be performed in addition to the actual script execution. This empty inventory collects the Exchange information from Active Directory. Script execution collects the mailbox information.

With Docusnap 13, the script execution now inventories not only the mailbox information but also the information from the Active Directory. This means that the "empty" Exchange inventory is no longer necessary. This scheduled job can be deleted.

7. DFS Inventory

DFS inventory has been adjusted with Docusnap 13. The data from DFS inventories performed with previous versions of Docusnap can be found in Docusnap 13 as follows:

- Your Company – Infrastructure – Your Domain – Network Services – DFS Legacy

The data from DFS inventories performed with Docusnap 13 can be found as follows:

- Your Company – Infrastructure – Your Domain – Network Services – DFS

Existing scheduled DFS inventory orders can be adjusted.

7.1 Necessary adjustments

DFS Inventory

In step 3 of the DFS Inventory Wizard, you can use the **Start Search** button to find and list all DFS namespace servers for inventory. Standalone namespace servers must be specified manually.

Specifying the domain name is no longer sufficient as of Docusnap version 13. If you have stored the domain name in existing jobs, you must change it.

NTFS analysis (IT security)

Step 4 - DFS has been added to the NTFS Analysis Wizard. Existing NTFS analyses need to be adapted.

Use of reports and data

The data structure of the DFS inventory has changed fundamentally and the reports have been adapted. For this reason, it is necessary to adapt the reports and data used so far, which you can have sent to you by e-mail or use in the documentation within the IT concepts.

7.2 Remote Inventory

The prerequisites for DFS inventory with Docusnap 13 are the following:

- Local administrator on all systems involved in DFS
- Member of the domain that contains the namespaces to be inventoried.
- Be aware of User Account Control (UAC) when executing
 - If the DSI result file cannot be imported and is only 1 KB in size, the permissions were insufficient.

You can find the Inventory Wizard as follows:

- Discovery – All Assistants – DFS
- Inventory – All Assistants – DFS
- All Orders – All Assistants – DFS

7.3 Script Inventory

Starting with Docusnap 13, script-based DFS inventory is now also possible. The script file is executed on the appropriate DFS systems with a user with the appropriate permissions (see previous chapter). The DSI result file can then be imported via the File Import Wizard.

By default, the script file is located in the Docusnap installation directory:

```
C:\Program Files\Docusnap 13\Tools\Discovery-DFS.exe
```

7.4 Analysis of access authorizations (IT security)

In the IT Security section, the inventoried DFS authorizations are displayed. All DFS permissions inventoried up to Docusnap 13 can be found under Your Domain - File System - DFS Legacy. This also applies to existing timed jobs.

Until Docusnap 13, DFS permissions in the IT security area were selected in step 3. Starting with Docusnap 13, there is now step 4 - DFS. The new dialog lists all folder destinations of the entered namespaces.

The selection is not limited to the folder destinations that are located on the DFS servers themselves. It also offers all Windows servers that are configured as a folder destination for this DFS share. Even if the folder destination is in a subdomain, NTFS analysis is possible.

The permissions that are inventoried via the new wizard step will then be located below your domain - file system - DFS.

8. Veeam Inventory

Until Docusnap 13, Veeam inventory was based on the Veeam database (MS SQL). With Docusnap 13 the inventory is now done via PowerShell.

Docusnap 13 includes the Veeam Legacy Inventory Wizard and Veeam Backup & Replication. The Veeam Legacy Wizard is based on the Veeam database and will not be further developed in the future. The Veeam Backup & Replication Wizard is based on PowerShell and will be our standard wizard for Veeam inventory in the future.

8.1 Necessary adjustments

Set up and schedule a new Veeam inventory

The new Veeam inventory will need to be set up and scheduled for you or your customers.

Use of reports and data

The data structure of Veeam inventory has changed fundamentally and the reports have been adapted. For this reason, it is necessary to adapt the reports and data used so far, which you can have sent to you by e-mail or use in the documentation within the IT concepts.

8.2 Remote Inventory

Prerequisites for Veeam inventory with Docusnap 13 are the following:

- **Local Administrator** on Veeam Server
- Member of the **Veeam Backup Administrators** role
- Veeam Backup & Replication ab der Version 11

You can find the Inventory Wizard as follows:

- Discovery – All Assistants – Veeam Backup & Replication
- Inventar – All Assistants – Veeam Backup & Replication
- All Jobs – All Wizards – Veeam Backup & Replication

By default, the Inventory Wizard requires domain authentication in advance (step 2). If your Veeam Backup Server is no longer part of the domain, you can do the following two options:

- In Step 3 of the Veeam Inventory Wizard, select Server Authentication.
 - You can now specify a local user and their password.
 - The domain authentication you performed earlier will not be used in this case.
- In the options (gear in the title bar) - Inventory - Inventory, you can enable the option: No domain authentication for Hyper-V, IIS, DFS, and Veeam
 - Note that domain authentication will no longer be possible for all of the inventory wizards mentioned!

8.3 Script Inventory

Starting with Docusnap 13, script-based Veeam inventory is now also possible. The script file is executed on Veeam Backup servers with a user with the appropriate rights (see previous chapter). The DSI result file can then be imported using the File Import Wizard.

By default, the script file is located in the Docusnap installation directory:

- C:\Program Files\Docusnap 13\Tools\Discovery-VeeamBR.exe

9. Uniform naming and filing of all script variants

As of Docusnap 13, all available script variants for inventory are stored in the Tools folder within the installation directory and named uniformly:

C:\Programme\Docusnap 13\Tools

If you call the script variants directly from a share from the Tools folder, there are two necessary changes:

Customization of the share path to change the installation directory... \Docusnap 12\... on ... \Docusnap 13\...

Customization of the file name,

Hint:

When using the script variants, we recommend installing a [Docusnap Discovery Service \(DDS\)](#) on the Docusnap Server system.

In the configuration GUI of a DDS, see **Settings – Storage of Inventory Modules**. All script files are available in the directory specified there, and these script files are automatically updated when an update occurs.

The directory can be shared or a shared folder on a remote system. Note that the files will be copied/overwritten by the executing user of the Docusnap Discovery service. By default, the service runs under the local system account.

VERSION HISTORY

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