

Customizing

Create reports



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1. INTRODUCTION

Docusnap takes an inventory of your IT infrastructure using various inventory assistants. Information is collected in the course of these inventories. The output and analysis of this information can be done by means of reports.

Docusnap comes with a number of reports that provide information in various forms.

- Information about the whole company
- Information about a domain
- Information about a system, application or service

The following HowTo should give you an introduction to reporting in Docusnap. Reports are created and output in Docusnap with the third-party product **Stimulsoft Report Designer**, which provides its own comprehensive user manual. In addition, you will find further information on the handling of reports in our **Configuration Manual - Reporting**.

Please note that the HowTo is aimed at experienced Docusnap users with knowledge of SQL and the Docusnap database.

Chapter 2 deals with the management of the reports. Where can the reports be managed in Docusnap and what options are available here.

Chapter 3 provides a basic description of the Stimulsoft Report Designer, including the interface, commonly used components, and also the structure of a report.

Chapter 4 describes in detail how to create a report. The chapter has a number of subchapters that describe step by step how to create a report.

- Identify data sources which tables from the Docusnap database are required?
- Prepare data sources create the necessary SQL queries to be executed within the report
- Create a new report create the report in Docusnap
- Create data sources Create the data sources within the report
- Creating the components Create the necessary components in the report for data output



2. MANAGEMENT OF REPORTS

All reports contained in Docusnap can be found and managed in Administration - Customizing - Manage Reports.

When you select a report, you can then find and adjust the name, author, file name and availability in the data tree.

The report selection provides you with the following decision-making options:

- Use customer report, otherwise system report
 - o If the report exists in the setting paths, then this is used
- Always use system report
 - o The predefined report from the program directory is always used
- Use latest report
 - The modification date of the reports is checked and the current one is used

These settings are relevant if you customize the predefined reports.

You cannot reassign the predefined reports within the tree structure without modification. For this purpose it is usually necessary to make appropriate adjustments in the report.

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Hyper-V Datasheet	Description:	
Hyper-V Overview	bechpuoli.	
IIS Datasheet		
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IIS Overview	Import File:	
IIS SMTP	🗈- 👶 Documentation	
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License Account Product Details	- 🔒 IT Security	
License Account Summary	🗵 🚳 License Management	
License Group Product Details		
License Group Product Overview		
License Group Summary		
License Key		
Laij cicense Product Details		

Figure1 - Managing Reports



3. REPORTS DESIGNER

You can edit a report within the Report Designer. You can open the Report Designer for existing reports in two ways.

1. Administration - Customizing - Managing Reports - Report Selection - Designer

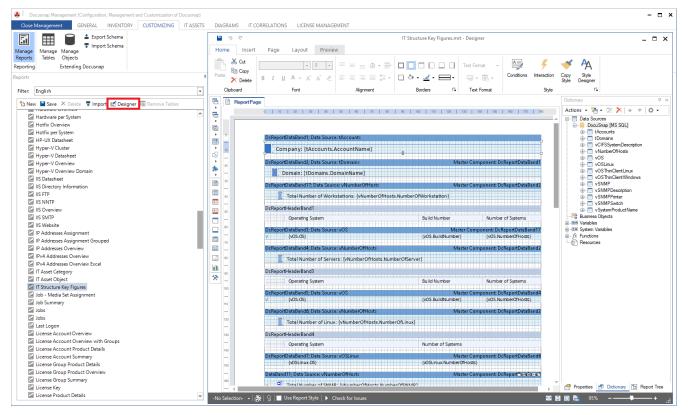
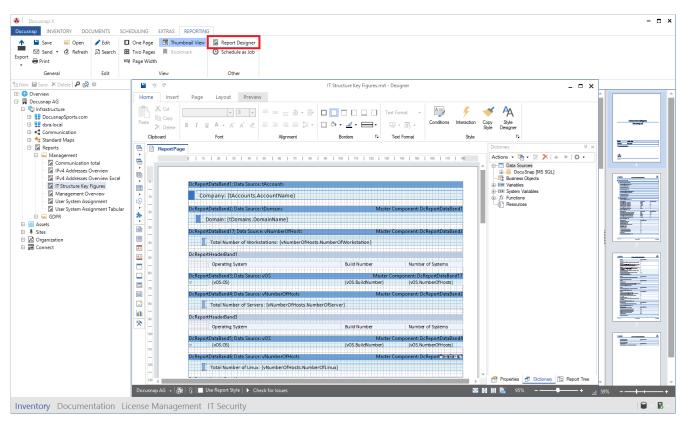


Figure 2 - Opening a report in the Report Designer





2. Opening a report from the tree structure - Reporting - Report Designer

Figure 3 - Opening a report in Report Designer II



3.1 REPORTS DESIGNER - SURFACE

The Report Designer consists of five sections:

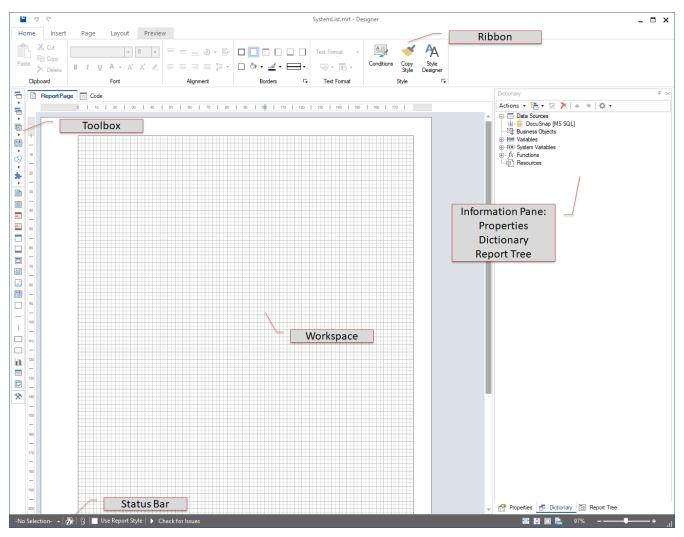


Figure 4 - Areas of the Report Designer

• Ribbon

The Ribbon is used to define settings regarding layouts, font designs and report categories. Furthermore, the preview of a report can be called up here.

• Toolbox

Provides reporting components with which the actual report is constructed. This includes, but is not limited to, data tapes, headers and footers, text fields.

Mainly the components tapes and text fields are used. For example, a data tape acts as a placeholder for the data to be output. The tape is output as often as there is data in the database.

The data header can be used, for example, as a heading / identifier for the data.



• Workspace

The components required for the report are stored within the work area.

- Information Pane
 - o Properties
 - o Dictionary
 - o Report tree

The **Properties** tab displays properties of selected components. Among other things, the report layout, the component style of text fields, size, position and other properties can be defined here.

The Dictionary includes the data sources, variables, system variables and functions used to display information from the Docusnap database within the report. By default there is always a connection to the Docusnap database. But other data sources can also be used.

The Report tree shows the hierarchical structure of the report with the components used.

• Status Bar

Within the status bar, adjustments to the designs and layout styles used in the report can be made and also switched between them.



3.2 THE STRUCTURE OF REPORTS WITHIN THE REPORT DESIGNER

The following screenshot shows you the structure of the predefined report - IT Structure Key Figures.

You can find the report in Docusnap as follows: Your company - infrastructure - reports - management.

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Figure 5 - Report Designer - Report Structure IT Structure Key Figures



In the work area of the report you can see the components used. The first component is a data tape with the data source tAccounts. This data tape displays the name of the company under which the report is called up.

A glance at the Dictionary section shows you the corresponding data source. The data source can be edited and viewed with a double click. As you can see here, the data sources are SQL queries.

select * from tAccounts where tAccounts.AccountID = {PrimaryKey}

The WHERE area and especially {PrimaryKey} is striking in the present data source.

The reports are linked to an object from the data tree. Each object has a primary key that identifies the data records of the table behind it. To ensure that the reports only display the data that belongs to this object, you can set a filter that compares the primary key with the table. This ensures that the correct data is output for the client, domain, system, etc. The variable {PrimaryKey} is assigned the respective value when the report is executed.

Examples of these primary keys / PrimaryKeys are:

• The output of all domains of a client - Linking the domain to the clients

```
select * from tDomains where tDomains.AccountID = {PrimaryKey}
```

• The output of all inventoried systems from a specific domain - Linking the systems to the higherlevel domain

select * from tHosts where tHosts.DomainID = {PrimaryKey}



4. CREATE YOUR OWN REPORT

The creation of reports is divided into the following steps

- Identify data sources in which tables is the data stored?
- Prepare data sources in SQL Management Studio
 - o Check relationships between the necessary tables
- Create report in administration
- Create and configure data sources
- Create components and drag them into the report
 - Linking components Transferring variables
- Formatting of the components

In this HowTo we want to create the following report, which can be called within the data tree as follows: Your company - infrastructure - reports - management.

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dsra.local				
Hostname	IP Online		Virtual	
DSSP02	172.31.251.18			✓
Operating System	Installation Date		Model Type	
Microsoft Windows Server 2008 R2 Enterprise	18.06.2010		VMware, Inc. VMware	/irtual Platform
Software Name	·	Software Version	Software Publisher	Software Install Dat
Active Directory Rights Management Services Cli	ent 2.0	1.0.621.117	Microsoft Corporation	06.09.2016
AppFabric 1.1 for Windows Server		1.1.2106.32	Microsoft Corporation	06.09.2016
Google Chrome		77.0.3865.90	Goog le LLC	24.09.2019
Microsoft .NET Framework 4.7.2		4.7.03062	Microsoft Corporation	12.09.2019
Microsoft CCR and DSS Runtime 2008 R3		2.2.760	Microsoft Corporation	06.09.2016
Microsoft Identity Extensions		2.0.1459.0	Microsoft Corporation	06.09.2016
Microsoft SharePoint Server 2013		15.0.4569.1506	Microsoft Corporation	
Microsoft SQL Server 2005 Analysis Services ADO	M D.NET	9.00.1399.06	Microsoft Corporation	06.09.2016
Microsoft SQL Server 2008 R2 Native Client		10.51.2500.0	Microsoft Corporation	06.09.2016
Microsoft Sync Framework Runtime v1.0 SP1 (x64	4)	1.0.3010.0	Microsoft Corporation	06.09.2016
Microsoft Visual C++ 2008 Redistributable - x64	9.0.30729.6161	9.0.30729.6161	Microsoft Corporation	23.02.2015
Microsoft Visual C++ 2008 Redistributable - x86	9.0.30729.4148	9.0.30729.4148	Microsoft Corporation	23.02.2015
Microsoft Visual C++ 2017 Redistributable (x64)	- 14.12.25810	14.12.25810.0	Microsoft Corporation	
Microsoft Visual C++ 2017 Redistributable (x86)	- 14.12.25810	14.12.25810.0	Microsoft Corporation	
Microsoft Windows Server 2008 R2 Enterprise	Vicrosoft Windows Server 2008 R2 Enterprise			18.06.2010
VMware Tools		10.3.5.10430147	VMware, Inc.	10.01.2019
WCF Data Services 5.0 (OData v3)		5.0.51212.0	Microsoft Corporation	
WCF Data Services 5.6 Tools		5.6.61587.0	Microsoft Corporation	
Windows Internet Explorer 11		11.0.9600.19463	Microsoft Corporation	

Figure6 - Self-Created Report



4.1 IDENTIFY DATA SOURCES

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

You can manage this in Administration - Customizing - 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.

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Figure 7 - Docusnap data tree



Also check the tables for the following objects:

- Account
 - o domain
 - Server_Data
 - ServerDocu
 - o ServerDetails_Data
 - o ServerSoftware_Data
- tAccounts tDomains tHosts tDocu tDocuWindows tSoftware

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

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	8	docus	napsports	.com	NULL	DOCUSN	IAPSPORTS	NULL	NULL	NU	JLL	NULL	NULL	-1	2	NU	ILL	NULL	N	IULL	NULL	
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	5	DSSP02	2		2		NULL	NULL	23				52\deff0\deflang1033		NULL		0	1		sx14.intem.local	NULL	20-4
	6	DSWS01			2		NULL	NULL	7				52\deff0\nouicompat\		NULL		0	1		sx15.intem.local	NULL	00-5
	7	DSFS01	2		2		NULL	NULL	25				52\deff0\deflang1033		NULL		0	1	se	sx15.intem.local	NULL	00-5
	9	SESX11	102		2		NULL	NULL	NULL				52\deff0\deflang3079		NULL		0	0			NULL	E4-1
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	198										3 00.00-00 00	0 VMware Inc. VM		Service F	a 1033					NULL		20971

Figure 8 - Analysis of tables in SSMS



4.2 PREPARE DATA SOURCES

For the report we need four data sources, which are listed below. Details and explanations of these data sources can be found in the following chapters.

1. Domain output - filtered to the client's domains

```
SELECT tDomains.*
     FROM tDomains
             WHERE tDomains.AccountID = {PrimaryKey}
      2. Output of Windows Server - filtered to the above domain
SELECT *
     FROM tHosts
             WHERE tHosts.HostTypeID in (2,3)
                                                                  -- Filtering Windows servers and DCs
                   AND tHosts.DomainID = @DomainID
      3. Output of general information - filtered to the appropriate Windows server
SELECT *
     FROM tDocuWindows, tDocu
            WHERE tDocuWindows.DocuID = tDocu.DocuID
      AND tDocu.archive = 0
                                                                  -- Filtering to final scan!
       AND tDocu.HostID = @HostID
      4. Installed software - filtered on the appropriate Windows server
SELECT *
     FROM tSoftware, tDocu
            WHERE tSoftware.DocuID = tDocu.DocuID
```

-- Filtering to final scan!

AND tDocu.archive = 0

AND tDocu.HostID = @HostID



4.3 CREATING THE REPORT

The new report is created in Administration - Customizing - Manage Reports - New.

Enter the name, author, file name and activate the report using the Activated report option. If you do not activate the report, it is not displayed in the data tree.

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📓 Virtual Machine Datasheet	beschpton.	
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	Er 🚳 License Management	
		

Figure 9 - Creating the new report in Docusnap Administration



4.4 CREATE / EDIT DATA SOURCES

4.4.1 USE OF EXISTING DATA SOURCES

Open the report just created from the tree structure in Docusnap and switch to the Report Designer.

You can also open the report directly from the administration - but then you have to specify the primary keys manually for previewing and checking the data sources. If you open the report from the tree structure, the primary keys are automatically transferred (preferred).

Within the Report **Designer - Dictionary** you will now find that all tables available in Docusnap can be found as data sources.

The data sources there can now be adapted accordingly. For our report:

- tDomains
- tHosts
- tDocuWindows
- tSoftware

If you use the available data sources, you must make sure that you activate them before use. To do this, select the data source, e.g. tDomains - right click tDomains - Properties - Connect at startup - True.

If all data sources were active right at the beginning, this would have a considerable impact on the performance of the report production.

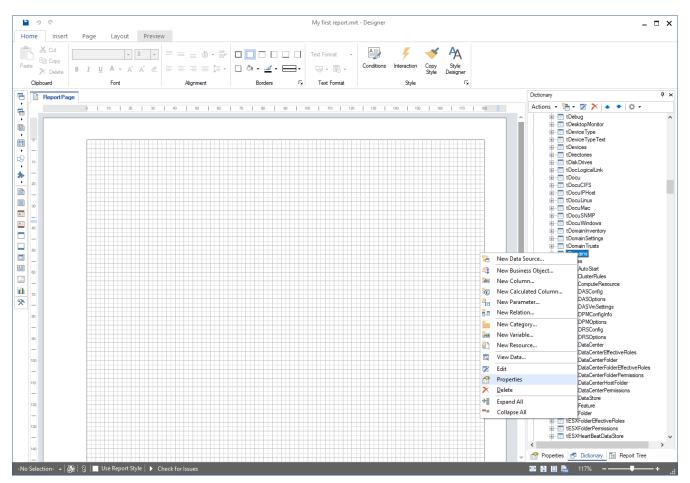


Figure 10 - Open data source properties



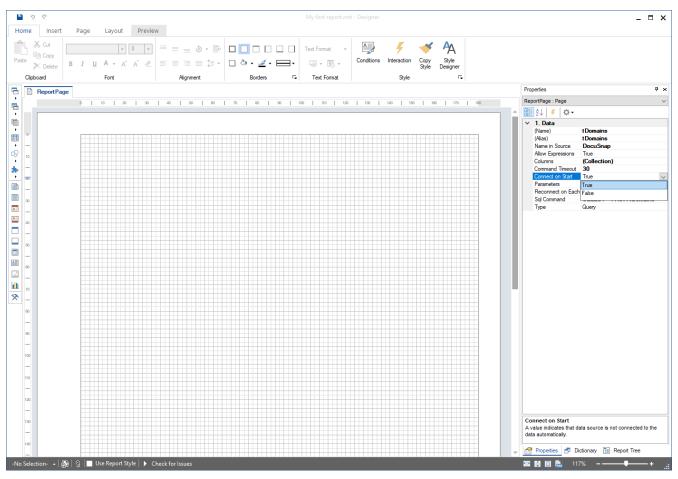


Figure 11 - Connect data source at startup



4.4.2 REMOVING THE EXISTING DATA SOURCE AND CREATING YOUR OWN

For reasons of clarity, we recommend that you remove the existing data sources and create them independently. In this way the data sources are also directly connected.

You can remove the data sources in Administration - Customizing - Manage Reports - Remove Tables.

The further preparation of the report involves removing the existing data sources and creating our own.

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Local Administrators (Users and Groups)	Author: Docusnap Consulting	Language:	English	-
Local Administrators per System	Addition. Doctamap consulting	Language:	English	
Local Administrators with Group Resolution	Report Cache: Off	 Report Cho 	ce: Use customer report, otherwise system report	•
I Local User Groups	File Name: EN My_First_Report		obal Format Settings	
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Multiple Installations of Software Versions	🗄 🗔 🌉 Company			
My first report	💠 🗔 🏠 Infrastructure			
Network Datasheet	🖶 🗔 👯 Domain			
Network Printer	🖶 🗆 📢 Communication			
Networks	🞰 🗔 🔩 Standard Maps			
Never logged on User	🗄 🗔 🔚 Reports			
No Longer Installed Software	🕮 🗆 🖬 Reports			
Not current inventories older than 3 months	🕂 🗌 🛁 Management			
Office 365 Offline Systems	L Z Report			
J Operating System Overview	iiii GDPR			
Oracle Details	⊡- □ 😁 Assets ⊕- □ 🖡 Sites			
a Oracle Overview				
Oracle System Parameters	B- B Connect			
Oracle System Privileges	B- A IT Security			
Oracle Table				
Oracle Tables Privileges				
Organization Datasheet				
Orphaned ACL Entries				
Outdated Inventory				
Outdated Inventory				

Figure 12 - Remove existing data sources / tables from the report



4.5 CREATING THE REQUIRED DATA SOURCES IN THE REPORT

4.5.1 CREATING THE DATA SOURCE - tDomains

Now create the data sources according to the following scheme:

- Dictionary Data Sources New Data Source DocuSnap
- Assign a name the alias will then be adjusted as well
- Define the SQL query
- Add the queried columns Select all columns

- 🗎 - S	2	¢	My first report.mrt - Designer	×
Home		New Data Source	x	
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Paste	Ne X	i DocuSnap	/e grer rs	
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•		🕨 MS SQL 🔍 MySQL	Edit Data Source X 100 1 100 Actions • 🛅 • 🖾 🗡 🚸 • 🔆 •	
•		a woode introde	Name in Source DocuSnap	
(iii) •			New Data Source Dijects	
• -		MS Access RostgreSQL	anables	
D 10			Alas tDomains Barton Ba	
* =		DB2 DB2	Ouery New Category P	
20			SQL 🔯 Run Query Builder	
		Universal (dotConnect)	SELECT tDomains.*	
			FROM tDomains + Expand All	
A 40		E NOSQL	WHERE tDomains.AccountID = {PrimaryKey}	
		MongoDB Azure Table Storage	Type Query	
		± File	Query Timeout 30 O	
60		⊞ REST		
 ∎∎		Objects	Columns & Parameters	
33			🛅 🐻 🎭 🗙 🗛 Retrieve Columns 🗛 -	
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-			FSMOPDC	
100		Skip Schema Wizard		
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-				
130				
-				
140			🗸 😭 Properties 📑 Dictionary 🔁 Report Tree	1
Docusna	ap A	አG 🔺 🚓 👔 🔲 Use Report Style 🕨 Check for Issu		.2

Figure 13 - Adding a new data source

The aim of the data source is to display the domains of the selected client. This data is queried using the following SQL query:

```
SELECT tDomains.*
FROM tDomains
WHERE tDomains.AccountID = {PrimaryKey}
```

The tDomains table contains all domains that exist in the Docusnap database. The AccountID is used to distinguish to which client these domains belong. The value for the variable {PrimaryKey} is automatically passed by Docusnap. This value depends on the client under which the report was called up.



4.5.1.1 READ ALL COLUMNS

The previously mentioned **Read All Columns** button ensures that all columns specified in the Select query are automatically available in the data source.

In our example above, the expression SELECT * FROM was used, which is why all columns from the table tDomains are now available.

If the SELECT query is specified on a few columns, only these columns are available afterwards.

If you have made changes to the SQL query that have an effect on the columns, you should delete the existing columns and read them out again:

- Open data source
- Select columns
- Select the red X this stands for "Delete

Edit Data Source	×				
Name in Source	DocuSnap				
Name	tDomains				
Alias	tDomains				
Query					
! SQL 🔍 🛛 Run Query Buil					
SELECT tDomains.Do: FROM tDomains WHERE tDom	mainName ains.AccountID = {PrimaryKey}				
Туре	Query ~				
Query Timeout	30				
Columns & Parameters					
🛅 🖏 🧞 🗡 🗛 Retr	ieve Columns 🛛 🖶 👻				
Columns Delete DomainID DomainName DNSName NetBIOSName FSMOPDC FSMORID FSMOInfrastructure FSMOSchema					
Save a Copy	OK Cancel				

Figure 14 - Deleting existing columns from the data source



4.5.2 CREATING THE DATA SOURCE - vWindowsServer

Now create the next data source: vWindowsServer. This data source will list the individual Windows servers.

Within the data source, a variable is now used, whose value we have to get from the data source / main component above (@DomainID - tDomains). The setup of a main component is described in chapter 4.6.

SELECT * FROM tHosts			
	ostTypeID in (2,3) sts.DomainID = @DomainID	Filtering Win	dows servers and DCs
Edit Data Source			×
Name in Source	DocuSnap		
Name	vWindowsServer		
Alias	vWindowsServer		
Query			
! SQL 🔯 🛛 Run Query	Builder		
	Hosts.HostTypeID in (2,3) tHosts.DomainID = @DomainID		^
Туре	Query \checkmark		
Query Timeout	30		
Columns & Paramete	rs		
🍢 🍇 🖓 🗙 🛤	Retrieve Columns 🛛 🖶 🗸		
Columns Parameters			
Save a Copy		ОК	Cancel

Figure 15 - Creating the vWindowsServer Data Source



If we now read all columns, we get the following error message:

Must declare the scalar variable "@DomainID".

We create the variable / parameter as follows:

- Right click on parameter New parameter
- Name: DomainID
- Expression: tDomains.DomainID
- Type: Int

Edit Data Source		×					
Name in Source	DocuSnap						
Name	vWindowsServer						
Alias	vWindowsServer						
Query							
🚦 SQL 🔯 🛛 Run Query Build	ler						
	s.HostTypeID in (2,3) osts.DomainID = @DomainID	<					
Туре	Query ~						
Query Timeout	30						
Columns & Parameters							
E & Parameters E Columns E Parameters E DomainID	eve Columns 🖳 -						
	(Name) Expression	DomainID fx tDomains.DomainID					
	Size Type	0 Int					
	(Name)						
Save a Copy		OK Cancel					

Figure 16 - Creating the Variable / Parameter DomainID



Now read out all columns, in this course you will receive a new message:



Figure 17 - Specifying the DomainID

Confirm this message with OK. Now the columns / fields of the data source have been added.

The used SQL query now gets the **DomainID** from the data source tDomains. As a result, only those Windows servers that are also members of this domain are listed after the domain is output.

There is also a filter within the SQL query: ... WHERE tHosts.HostTypeID in (2,3)...

All systems that are inventoried with Docusnap can be found in the tHosts table. The HostTypeID is used to distinguish the system types. The different HostTypeIDs can be taken from the table tHostTypes:

- 0 Offline
- 1 Workstation
- 2 Server
- 3 DC
- 4 SNMP
- 5 IP Host
- 6 CIFS
- 8 DFS
- 100 Linux Offline
- 101 Linux Workstation
- 102 Linux Server
- 103 Linux DC
- 200 Mac Offline
- 201 Mac Workstation
- 301 ThinClientWindows
- 302 ThinClientLinux
- 303 ThinClient
- 401 HPUX



4.5.3 creating the data source - vDocuWindows

Now create the data source: vDocuWindows. This data source will output the general information about the Windows servers. This data source reflects the information of the Windows servers, which can be found in the data tree as follows

Your company - Infrastructure - Your domain - Server - Server name - Scandate - General

```
SELECT tDocuWindows.*
FROM tDocuWindows, tDocu
WHERE tDocuWindows.DocuID = tDocu.DocuID
AND tDocu.archive = 0
AND tDocu.HostID = @HostID
```

-- Filtering to final scan!

Within the data source the tables tDocuWindows and tDocu are joined together. This JOIN takes place via the DocuID. The DocuID determines the scan for which the Windows Server data is to be output. The expression tDocu.Archive = 0 determines that the data of the last scan is output.

In this data source now the variable / parameter HostID is used. This ensures the assignment to the Windows server.



Create the variable with the following values and then read out all columns again:

- Name: HostID
- Expression: vWindowsServer.HostID
- Type: Int

Edit Data Source		×			
Name in Source	DocuSnap				
Name	vDocuWindows	vDocuWindows			
Alias	vDocuWindows				
Query					
! SQL 🔯 🛛 Run Query Bui	lder				
AND tDocu.	ows, tDocu uWindows.DocuID = tDocu.Docu	AID ×			
Туре	Query ~				
Query Timeout	30 🛓				
Columns & Parameters					
🏝 🍇 🍢 🗙 🗛 Ret	rieve Columns 🛛 🖶 🗸				
E Columns Parameters		Host ID			
(Name)					
Save a Copy		OK Cancel			

Figure 18 - Creating the variable / parameter HostID



4.5.4 CREATING THE DATA SOURCE - vSoftware

Now create the data source: vSoftware. This data source will output the installed software of the Windows servers.

```
SELECT tSoftware.*
FROM tSoftware, tDocu
WHERE tSoftware.DocuID = tDocu.DocuID
AND tDocu.archive = 0
AND tDocu.HostID = @HostID
```

-- Filtering to final scan!

In this data source the tables tSoftware and tDocu are joined together and also filtered again for the last scan (tDocu.Archive = 0).

Also here again the variable / parameter HostID is needed, which is created with the same values as the previous one. After creating the variable, all columns must be read out again.



Edit Data Source		×		
Name in Source	DocuSnap			
Name	vSoftware			
Alias	vSoftware			
Query				
🚦 SQL 🔯 🛛 Run Query Buil	der			
AND tD	, tDocu tware.DocuID = tDocu.DocuID ocu.Archiv = 0 ocu.HostID = @HostID			
Туре	Query ~			
Query Timeout	30			
Columns & Parameters				
🛅 🍓 🧞 🗙 🗛 Retr	ieve Columns 🛛 🖶 🗸			
E Columns ₽ _[2] Parameters ₽ _[2] HostID		Host ID T vWindowsServer.Host ID 0 Int		
Save a Copy		OK Cancel		

Figure 19 - Creating the Variable / Parameter HostID



4.5.5 ACTIVATE THE PROPERTY - RECONNECT FOR EACH LINE

Before the individual components are created, the property **Reconnect at every row** must be activated for the previously created data sources.

You do this as follows:

- Right click on the data source Properties
- Reconnect on each line True

- 12	5 6				My first report.	mrt - Designer		_ 🗆 ×
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5	Report Pa	age						Properties 7 ×
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ŀ								▲ 🔮 2↓ 🗲 🔅 -
•								(Name) vSoftware
	-							(Alias) vSoftware
-								Allow Expressions True
~~~	10							Columns (Collection)
	-							Command Timeout 30
•	20							Connect on Start True Parameters (Collection)
	-							Reconnect on Each Ro True
	30							Sql Command True
A	_							Type False
A	40							
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	60							
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	130							Reconnect on Each Row A value which indicates that data source reconnect on each master
	-							row in master-detail reports.
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Figure 20 - Activating the property - Reconnect at each row



## 4.6 CREATING THE COMPONENTS FOR THE OUTPUT OF THE INFORMATION

In the following chapters, the components that ensure that the desired information is output in the report are now created. These components are:

- Headgear
- Data tapes
- Text fields

#### 4.6.1 CREATING THE COMPONENTS FOR THE OUTPUT OF THE DOMAIN

The easiest way to create the corresponding components is to drag and drop the previously created data source - **tDomains** - into the **workspace** of the Report Designer.

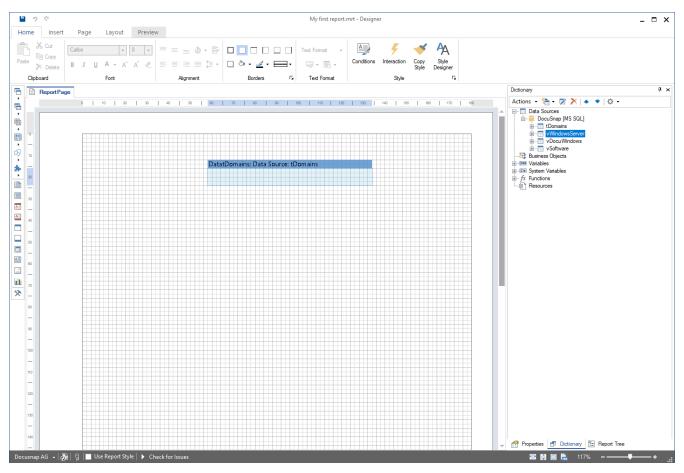


Figure 21 - Drag and drop data source into the work area



The following window appears, allowing you to select the fields to be displayed. You can also select whether a data header and data footer tape should be created for the fields.

Select the checkbox for the DomainName field.

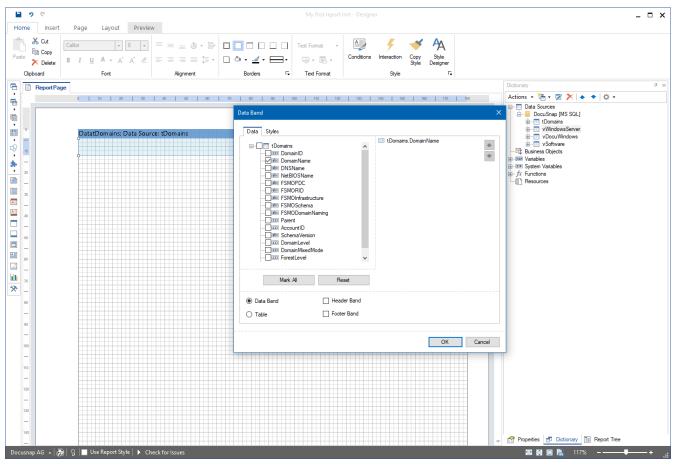


Figure 22 - Selection of the DomainName field



#### 4.6.1.1 ADJUSTING THE FORMATTING OF COMPONENTS / FIELDS

As a result, you have stored the first component in the report. This can now be formatted using the Style component.

- To do this, mark the text field stored in the data tape
- Select the Properties tab in the information window
- Below Appearance Component Style you can now select a style and thus determine the formatting
- Select Title_Level1

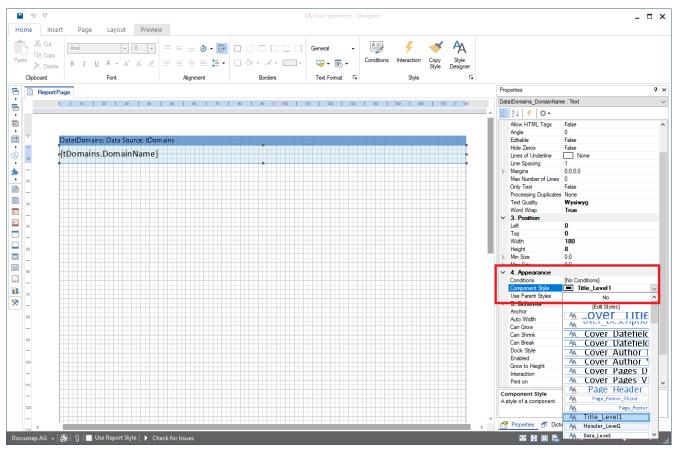


Figure 23 - Component Style Selection - Formatting

Using the **Preview** tab within the Ribbon Command Bar you can now open a first preview of the report - the domain(s) will now be output.

<b>9</b> C		My first report.mrt - Designer	_
Home Insert	Page Layout Preview		
Print Copen Print Save Prile	Bookmarks Parameters Resources Thu	ribrialis Find One Page Page Width Screen Tools View	
	dsra.local DocusnapSports.com		
🕅 🖣 Page 1 of 1	▶ ▶   ▶ Check for Issues   Refresh		🔳 🔚 🏭 136% 🗕 ——— 🖡 —— 🕂

Figure 24 - First preview of the report - output of the domain(s)



#### 4.6.1.2 ADJUSTING THE HEIGHT OF COMPONENTS

Furthermore, you should increase the height of the data tape to 12 and position the text field in it further in the middle.

You adjust the height of the data band within the Properties - Position - Height.

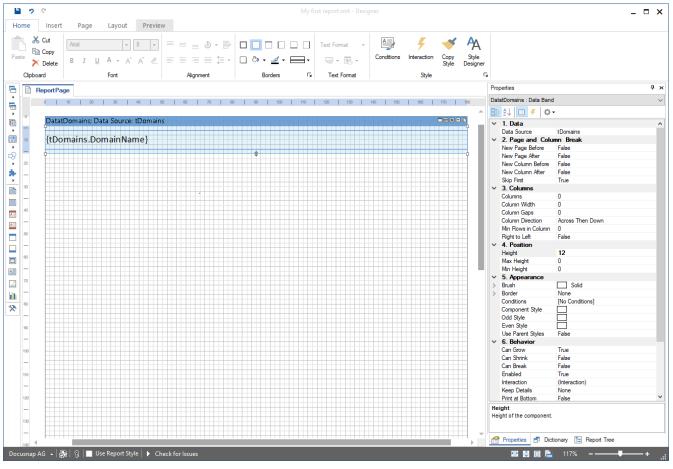


Figure 25 - Adjusting the height of the data band

The change is noticeable with a free space between the two domains:

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dsra.local DocusnapSports.com		





#### 4.6.2 CREATING THE COMPONENTS FOR THE OUTPUT OF THE WINDOWS SERVERS

Drag and drop the vWindowsServer data source into the Report Designer workspace.

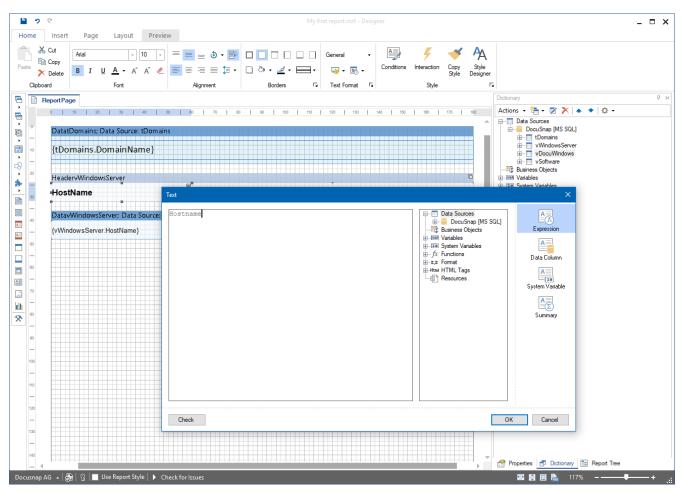
Select the following fields and options to display in the report:

- Hostname
- IpOnline
- IsVirtual
- Data header tape

Data Band		×
Data Styles		<ul> <li>vWindowsServer.HostName</li> <li>vWindowsServer.lpOnline</li> <li>vWindowsServer.lsVirtual</li> </ul>
Mark All	Reset	
Data Band	✓ Header Band	
⊖ Table	Footer Band	
		OK Cancel

Figure 27 - Selecting Fields and Options





You can adjust the column names from the header band by double-clicking on the text field.

Figure 28 - Adjusting column labels from the header band

Adjust the formatting for the data header and data tape using the Styles component.

Also adjust the heights of the data header and data tape:

- HeadervWindowsServer Properties Height = 6
- DatavWindowsServer Properties Height = 5

The heights of the column labels and data tape fields must also be adjusted.

- Header column captions properties height = 6
- Data tape Fields Properties Height = 5



#### 4.6.2.1 ESTABLISH RELATIONSHIPS BETWEEN COMPONENTS / DEFINE MAIN COMPONENTS

The newly added data tape must be associated with the DatatDomains data tape. The correct designation is: The main component must be defined. This adjustment ensures that the domain is output on the first level. Below the domain, the corresponding Windows servers are then listed. After all Windows servers were listed, the other domains would be listed.

If this is not done, all domains will be listed first, followed by all servers - it would not be possible to assign domains to servers within them.

You establish this connection by double-clicking on the data tape - main component - DatatDomains.

Data Band	×
[Not Assigned] Datat Domains	• Data Source
	Master Component
	Sort
	Filters
ОК	Cancel

Figure 29 - Selecting the Main Component for the vWindowsServer Data Source

You can see the selection of the main component directly on the data tape, in the right-hand area:

DatavWindowsServer; Data Source		Master Component: DatatDomains
{vWindowsServer.HostName}	{vWindowsServer.IpOnline}	· · · · · · · · · · · · · · · · · · ·

Figure 30 - Selecting the main component for the data tape



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	nels Tools View		
dsra.local			
Hostname	IP Online	Virtual	
DSDC01	172.31.251.10	✓	
DSFS02	172.31.251.12	✓	
DSEX01	172.31.251.15	✓	
DSSP02	172.31.251.18	✓	
DSFS01	172.31.251.11	✓	
DSBK01	172.31.251.22	✓	
DSFS04	172.31.2.15	✓	
DSSP01	172.31.251.17	✓	
DSFS03	172.31.251.34	✓	
DSBK02	172.31.251.23	✓	
DSSP03	172.31.251.19	✓	
DSHY01-N1	172.31.251.53	✓	
DSHY01-N2	172.31.251.54	✓	
DOSPSP01	172.31.251.2	✓	
DOSPD B01	172.31.251.31	✓	
DOSPSQ01	172.31.251.13	✓	
DOSPEX01	172.31.251.6	✓	
DSDC02	172.31.251.9	✓	





### 4.6.3 CREATING THE COMPONENT FOR OUTPUTTING GENERAL INFORMATION

Drag and drop the vDocuWindows data source into the Report Designer workspace.

Select the following fields and options to display in the report:

- OS
- InstallationDate
- ModelType
- Data header tape

Make the following adjustments:

- Column captions
- Formatting
- Height of the data header tape and the data header fields = 6
- Height of the data tape and database fields = 5

You can copy the formatting from the previous data and data header Tape. To do this, select a field from the Tape data or data header and then select the **Copy Style** element from the Ribbon Command Bar. Now select the corresponding fields for which the formatting is to be applied.

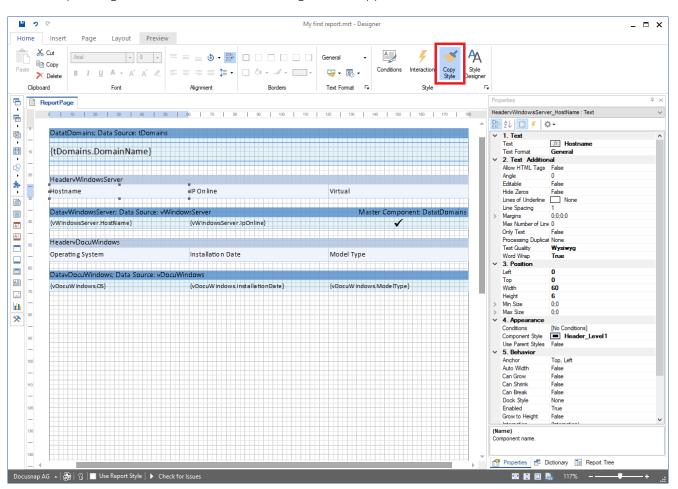


Figure 32 - Copy Style



Also for this component you need to select one main component - DatavWindowsServer.

- Double-click on the DatavDocuWindows data tape
- Main component
- Selecting DatavWindowsServer
- OK



#### 4.6.3.1 CUSTOMIZE DATE FIELDS

Furthermore we have in this component the output of a date. When you check the output of the date in the report preview, you will notice that the time is displayed in addition to the date. Z. B. 27.01.2020 00:00:00.

You can change the date format display as follows:

- Select the date field
- Select the **Properties** tab in the **information window**
- Below Text Text Format General open the context menu
- Format Date Select date format

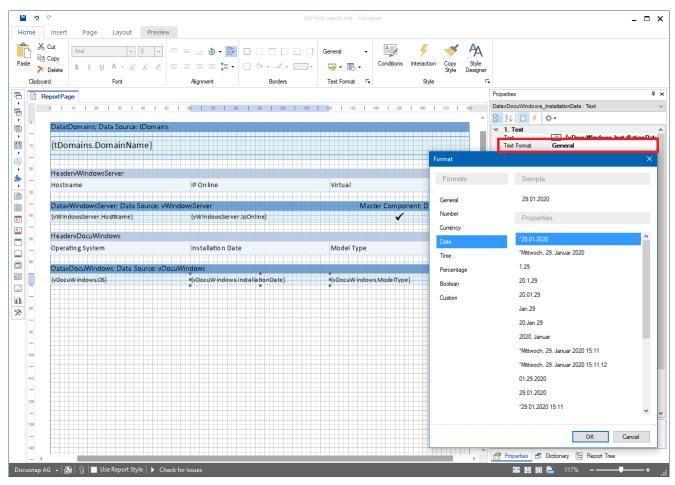


Figure33 - Customize Date Format



#### 4.6.3.2 INCLUDE DISTANCES BETWEEN THE INFORMATION

If you preview the current status of the report, you will notice that the report information is not displayed legibly. A gap between the individual pieces of information is desirable.

[»] Insert Page Lavout <b>Preview</b>	My first repo	rt.mrt - Designer	
Insert Page Layout Preview  pen ave  Bookmarks Parameters Resources Thumbnai e Panels	s Find One Page Full Screen Tools View		
dsra.local			
Hostname	IP Online	Virtual	
DSD C01	172.31.251.10	✓	1
Operating System	Installation Date	Model Type	
Microsoft Windows Server 2012 R2 Standard	01.05.2014	VMware, Inc. VMware Virtual Platform	
DSFS02	172.31.251.12	✓	
Operating System	Installation Date	Model Type	
Microsoft Windows Server 2012 R2 Standard	05.05.2014	VMware, Inc. VMware Virtual Platform	
DSEX01	172.31.251.15	✓	
Operating System	Installation Date	Model Type	
Microsoft Windows Server 2012 R2 Standard	12.01.2015	VMware, Inc. VMware Virtual Platform	
DSSP02	172.31.251.18	✓	
Operating System	Installation Date	Model Type	
Microsoft Windows Server 2008 R2 Enterprise	18.06.2010	VMware, Inc. VMware Virtual Platform	
DSFS01	172.31.251.11	✓	
Operating System	Installation Date	Model Type	
Microsoft Windows Server 2008 R2 Enterprise	19.03.2011	VMware, Inc. VMware Virtual Platform	
DSBK01	172.31.251.22	✓	
Operating System	Installation Date	Model Type	
Microsoft Windows Server 2012 R2 Standard	09.09.2016	VMware, Inc. VMware Virtual Platform	
DSFS04	172.31.2.15	✓	
Operating System	Installation Date	Model Type	
Microsoft Windows Server 2008 R2 Enterprise	18.06.2010	VMware, Inc. VMware Virtual Platform	
DSSP01	172 31 251 17	1	

Figure 34 - Current preview of the report - v3

You can create these distances using the data header Tapes. Make the following adjustments to the two data header tapes:

HeadervWindowsServer and HeadervDocuWindows - height = 8

You also position the data header fields at the bottom of the screen. To do this, mark all fields - Properties - Top = 2

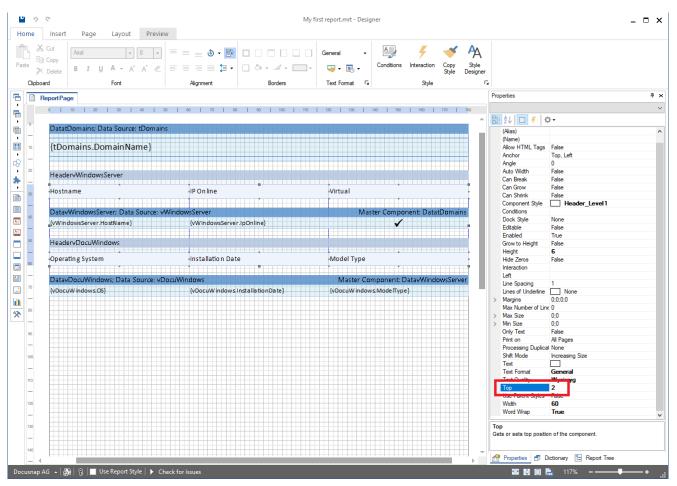


Figure 35 - Adjusting the positioning of the data header fields

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Home Insert Page Layout Preview			
Print Save  Send Email  Bookmarks Parameters Resources Thumbnals Thumbnals	Image     Image     Image       Find     One Page     Page Width     Full Screen		
File Panels	Tools View		
dsra.local			
Hostname	IP Online	Virtual	
DSDC01	172.31.251.10	✓	
Operating System	Installation Date	Model Type	
Microsoft Windows Server 2012 R2 Standard	01.05.2014	VMware, Inc. VMware Virtual Platform	
DSFS02	172.31.251.12	✓	
Operating System	Installation Date	Model Type	
Microsoft Windows Server 2012 R2 Standard	05.05.2014	VMware, Inc. VMware Virtual Platform	
DSEX01	172.31.251.15	✓	
Operating System	Installation Date	Model Type	
Microsoft Windows Server 2012 R2 Standard	12.01.2015	VMware, Inc. VMware Virtual Platform	
DSSP02	172.31.251.18	✓	
🕅 🔍 Page 1 of 2 🕨 🔰 🅨 Check for Issues 🛛 Refresh			<b>I</b> 📑 II 130%+

Figure 36 - Current preview of the report - v4

Please ignore the fact that there is no gap between the general system information (operating system, installation date, model) and the Windows server information (hostname, IP and virtual). This will automatically dissolve in the next step.

Docusnap



### 4.6.4 CREATING THE COMPONENT FOR OUTPUTTING THE INSTALLED SOFTWARE

Drag and drop the vSoftware data source into the Report Designer workspace.

Select the following fields and options to display in the report:

- Software name
- Software version
- SoftwarePublisher
- SoftwareInstallDate
- Data header tape

Make the following adjustments again:

- Column captions
- Formatting
- Format of the date field
- Height of the data header band = 8 and the data header fields = 6
- Positioning of the data header fields Top = 2
- Height of the data tape and data tape fields = 5

Selection of the main component - DatavWindowsServer.

The preview of the report should now give you the following view:

Home Insert Page Layout Preview  Home Save Print Save File Panels File Panels File File File File File File File File	 -		er	ly first report.mrt - Design				<b>9</b> 9
Image: Save Print       Im							Page Layout Preview	Home Insert
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					Tools View		Panels	File
								-
dsra.local							dsra.local	-
Hostname IP Online Virtual			Virtual		IP Online		Hostname	
DSDC01 172.31.251.10 ✓	 1		✓		172.31.251.10		DSD C01	
Operating System Installation Date Model Type			Model Type	Model Type			Operating System	
Microsoft Windows Server 2012 R2 Standard 01.05.2014 VMware, Inc. VMware Virtual Platform		Platform	VMware, Inc. VMware Virtual Platform		d 01.05.2014		Microsoft Windows Server 2012 R2	
Software Name Software Version Software Publisher Software Install Date		ate	Software Install Date	tware Publisher	rsion	Software Ve	Software Name	
Microsoft Visual C++ 2012 Redistributable (x64) - 11.0.60610.1 Microsoft Corporation 01.01.0001 00:00:00		0	01.01.0001 00:00:00	crosoft Corporation	l .	11.0.60610.		
Administrative Templates (ADMX) for Windows 10 and Windows Server 2016		0	12.06.2017 00:00:00	crosoft Corporation		2.0	Administrative Templates (ADMX) for Windows 10 and Windows	
Server 2016         Microsoft Visual C++ 2017           Microsoft Visual C++ 2017         14.12.25810.0           Redistributable (x64) - 14.12.25810         Microsoft Corporation           01.01.0001 00:00:00		0	01.01.0001 00:00:00	crosoft Corporation	.0		Microsoft Visual C++ 2017	
ADMT Password Migration DLL 6.0.6001.16640 Microsoft Corporation 26.10.2018 00:00:00		0	26.10.2018 00:00:00	crosoft Corporation	540	6.0.6001.166		
Microsoft Visual C++ 2008 Redistributable - x86 9.0.30729.4148 Microsoft Corporation 01.05.2014 00:00:00		0	01.05.2014 00:00:00	crosoft Corporation	148	9.0.30729.4	Redistributable - x86	
Microsoft Visual C++ 2005 Redistributable		D	12.09.2016 00:00:00	crosoft Corporation		8.0.61001		
VMware Tools 10.3.5.10430147 VMware, Inc. 10.01.2019 00:00:00		0	10.01.2019 00:00:00	lware, Inc.	0147	10.3.5.1043		
Microsoft Visual C++ 2008 Redistributable - x86 9.0.30729.6161 H   Page 1 of 14  H  Check for Jasues Refresh			12.09.2016 00:00:00	crosoft Corporation	161	9.0.30729.6	Redistributable - x86	

Figure 37 - Current preview of the report - v5

Customizing | ©2018 Docusnap – All rights reserved



You will also notice in the preview that some software products use the installation date 01.01.0001 00:00:00. There is actually no entry in the database after this date. To ensure that no entry is displayed here, the data type of the field must be adapted. You can do this as follows:

- Information window Dictionary vSoftware Double click on SoftwareInstallDate
- Change the **type datetime** to **datetime (nullable)**

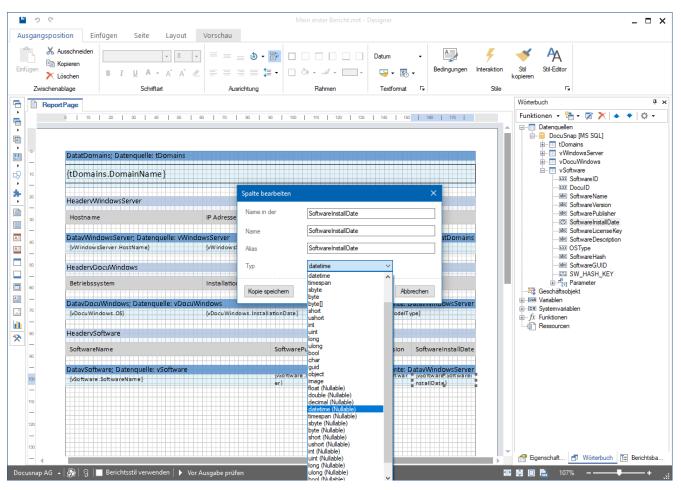


Figure38 - Hide zero values



#### 4.6.4.1 AUTOMATIC ADJUSTMENT OF THE COLUMN HEIGHT

In the following screenshot you will notice that due to the long name of the software product the line has been wrapped. However, the line break only affects the column of the software name. The height of the following columns is not affected.

≌ 🤊 ୯	My first report.mrt - Designer						
Home Insert Page Layout Preview							
Print → Save → Bookmarks Parameters Resources Thumber	ails Find One Page W	age Full Screen					
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Hostname	IP Online		Virtual				
DSD C01	172.31.251.10			✓			
Operating System	Installation Date		Model Type				
Microsoft Windows Server 2012 R2 Standard	01.05.2014		VMware, Inc. VMware	/irtual Platform			
Software Name		Software Version	Software Publisher	Software Install Date			
Administrative Templates (ADMX) for Windows 1 2016	0 and Windows Server	2.0	Microsoft Corporation	12.06.2017			
ADIVIT FASSWORD WIGHTON DEL		0.0.0001.10040	wher osore corporation	20.10.2018	-		
Microsoft Visual C++ 2005 Redistributable		8.0.61001	Microsoft Corporation	12.09.2016			
Microsoft Visual C++ 2005 Redistributable (x64)	Microsoft Visual C++ 2005 Redistributable (x64)		Microsoft Corporation	12.09.2016		2	
Microsoft Visual C++ 2008 Redistributable - x64 9	9.0.30729.6161	9.0.30729.6161	Microsoft Corporation	01.05.2014			
Microsoft Visual C++ 2008 Redistributable - x86 9	9.0.30729.4148	9.0.30729.4148	Microsoft Corporation	01.05.2014			
A Page 1 of 20 🕨 🔰 🕨 Check for Issues   Refresh					123%	+	

Figure 39 - Different line heights



Select all available columns that display information about the installed software. In the next step, select the tab **Property - Grow to Height - True in the** information window.

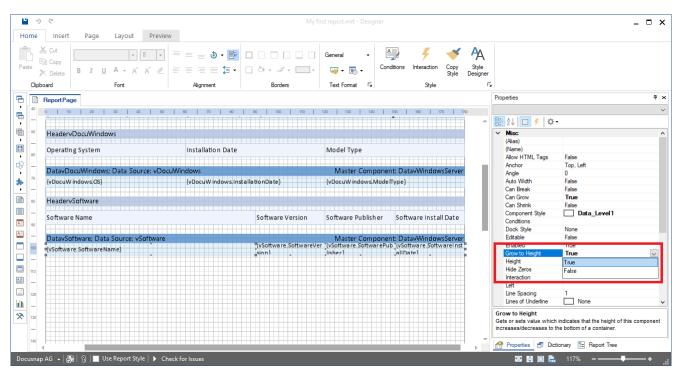


Figure 40 - Activating the option - Grow to height

The adjustment now causes the row height of all columns to be adjusted accordingly:

<b>9</b> °			My first report.mrt - Design	er			_ 🗆 ×
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DSD C01		172.31.251.10			✓		1
Operating	System	Installation Date		Model Type			
Microsoft V	Microsoft Windows Server 2012 R2 Standard 01.05.2014			VMware, Inc. VMware Virtual Platform			
Software N	ame		Software Version	Software Publisher	Software Install Date		
Administrat 2016	tive Templates (ADMX) for Windows 1	0 and Windows Server	2.0	Microsoft Corporation	12.06.2017		
ADMT Pass	word Migration DLL		6.0.6001.16640	Microsoft Corporation	26.10.2018		
Microsoft V	isual C++ 2005 Redistributable		8.0.61001	Microsoft Corporation	12.09.2016		2
Microsoft V	isual C++ 2005 Redistributable (x64)		8.0.61000	Microsoft Corporation	12.09.2016		
Microsoft V	isual C++ 2008 Redistributable - x64	9.0.30729.6161	9.0.30729.6161	Microsoft Corporation	01.05.2014		
Microsoft V	isual C++ 2008 Redistributable - x86	9.0.30729.4148	9.0.30729.4148	Microsoft Corporation	01.05.2014		
Microsoft V	isual C++ 2008 Redistributable - x86	9.0.30729.6161	9.0.30729.6161	Microsoft Corporation	12.09.2016		
Microsoft V	isual C++ 2010 x64 Redistributable -	10.0.40219	10.0.40219	Microsoft Corporation	12.09.2016		
	Check for Issues   Refresh					130%	+

Figure 41 - Row Height of All Columns is Adjusted



#### 4.6.4.2 ADJUSTING THE COLUMN WIDTH

In the preview of the report, you can see that the width of the individual fields can / should be adjusted so that the information can be presented clearly.

To do this, select the field from the data header Tape and the corresponding field from the data tape. In the next step, select the **Property - Other - Width** tab in the information window to adjust the width accordingly. The positioning is then carried out with the mouse.

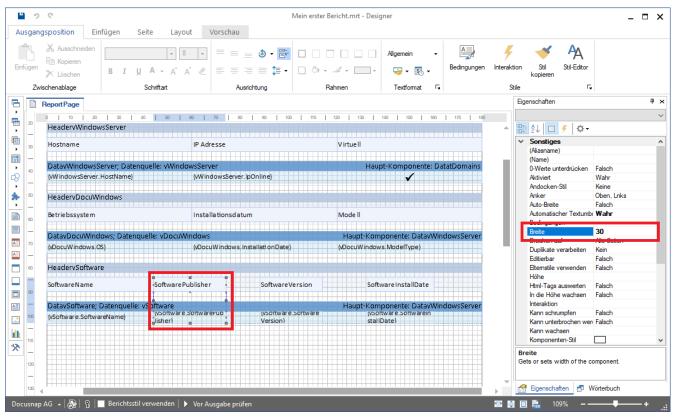


Figure 42 - Adjusting the width of individual fields



#### 4.6.4.3 CUSTOMIZE THE SORT ORDER

By default, the installed software products are sorted by SoftwareID. It would be better to sort them in alphabetical order. You can perform this sorting as follows:

Double click on the data tape DatavSoftware - Sort - Selection by which columns to sort in ascending or descending order.

Datenband		×
Datenband         +al       Sortierung hinzufügen         Sortieren nach	∑ortierung entfernen         [ohne Sortierung]         ✓         (ohne Sortiware)         (ohne Sortiware)	• Datenquelle Datenquelle Beziehung Haupt-Komponente Sortieren
	OK	Abbrechen

Figure43 - Customizing the Sort Order



## 4.6.5 COMPLETION OF THE REPORT

By and large, the report is now finished and should look like the following via the preview:

୨ ୯ Insert	Dage Lavert Dreview		My first report.mrt - Desig	gner		-
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rile	Failets	Tools View				
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	DSD C01	172.31.251.10			Image: A state of the state	
	Operating System	Installation Date		Model Type		
	Microsoft Windows Server 2012 R2 Standard	01.05.2014		VMware, Inc. VMware V	/irtual Platform	
	Software Name		Software Version	Software Publisher	Software Install Date	
	Administrative Templates (ADMX) for Windows 2016	10 and Windows Server	2.0	Microsoft Corporation	12.06.2017	
	ADMT Password Migration DLL		6.0.6001.16640	Microsoft Corporation	26.10.2018	
	Microsoft Visual C++ 2005 Redistributable		8.0.61001	Microsoft Corporation	12.09.2016	2
	Microsoft Visual C++ 2005 Redistributable (x64)		8.0.61000	Microsoft Corporation	12.09.2016	
	Microsoft Visual C++ 2008 Redistributable - x64	9.0.30729.6161	9.0.30729.6161	Microsoft Corporation	01.05.2014	
	Microsoft Visual C++ 2008 Redistributable - x86	9.0.30729.4148	9.0.30729.4148	Microsoft Corporation	01.05.2014	
	Microsoft Visual C++ 2008 Redistributable - x86	9.0.30729.6161	9.0.30729.6161	Microsoft Corporation	12.09.2016	
	Microsoft Visual C++ 2010 x64 Redistributable	10.0.40219	10.0.40219	Microsoft Corporation	12.09.2016	
	Microsoft Visual C++ 2010 x86 Redistributable	10.0.40219	10.0.40219	Microsoft Corporation	12.09.2016	
	Microsoft Visual C++ 2012 Redistributable (x64)	- 11.0.60610	11.0.60610.1	Microsoft Corporation		
	Microsoft Visual C++ 2017 Redistributable (x64)	- 14.12.25810	14.12.25810.0	Microsoft Corporation		3
	Microsoft Visual C++ 2017 Redistributable (x86)	- 14.12.25810	14.12.25810.0	Microsoft Corporation		
	11 🕨 🔰 🕨 Check for Issues   Refresh					130%

Figure 44 - Finished report

In the following chapter, further improvements and formatting are presented, which should further enhance the report.



# 5. FURTHER FORMATTING AND OPTIONS

## 5.1 OUTPUTTING DATA TAPES ON ALL PAGES

If you look at the report on the second page, you will see that the domain is not output. If you have more than one domain, it would be convenient if the domain is printed again on each page so that the assignment to the domain is immediately visible.

To do this, select the DatatDomains data tape and enable the option as follows - Information window - Properties - Behavior - Print on all pages - True.

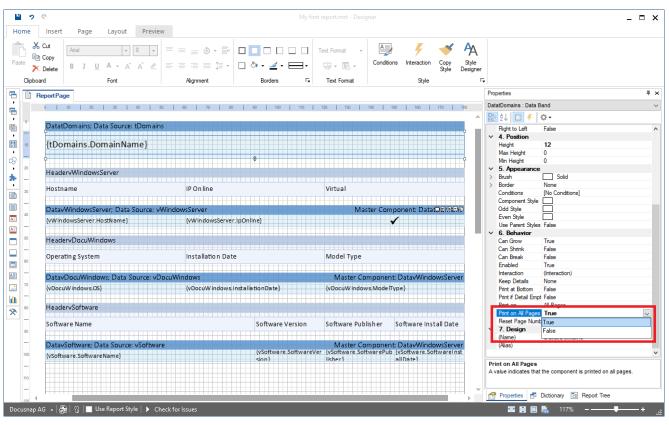


Figure 45 - Option - Print on all pages

Applied to other data tapes, this option means that the data tapes or data header tapes are output on all pages.

You should also make this adjustment to the following data headers and data tapes:

- HeadervWindowsServer
- DatavWindowsServer
- HeadervSoftware



# 5.2 OUTPUT NEW DATA RECORDS ON THE NEXT PAGE

It can help the clarity if a new data record is output on a new page. In this report, for example, a new system is output on a new page.

To do this, select the data tape before whose output a new page is to be created. In this example it is the DatavWindowsServer data tape. In the Information window, select - Properties - Page and Column Break - Before New Page and set the value True.

Furthermore, you can see in the lower right corner that a description is displayed for each selected option.

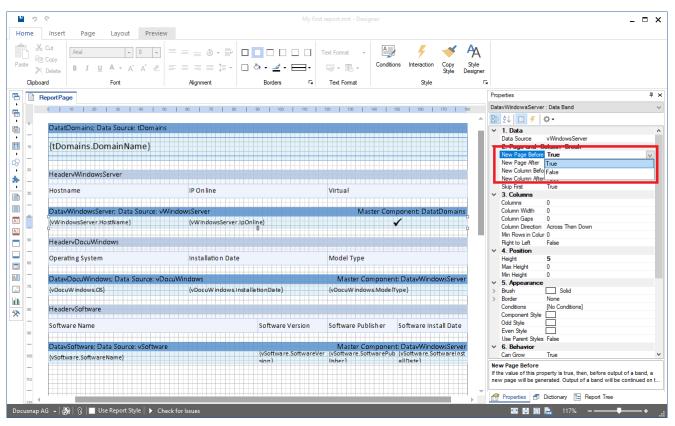


Figure 46 - Option - Before New Page



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