User System Assignment Reports

Creating Reports on User Assets and Systems

TITLE	User System Assignment Reports
AUTHOR	Docusnap Consulting
DATE	12/17/2018
VERSION	1.1 | valid from September 26, 2018

This document contains proprietary information. The reproduction and distribution of this document as a whole or in part as well as the utilization and disclosure of its contents to third parties without the express authorization by itelio GmbH are prohibited. Offenders will be held liable for the payment of indemnification. All rights reserved.

TABLE OF CONTENTS

1. Introduction 4
2. Assigning Automatically Inventoried Systems to an ADS User 5
3. Adding User Information to IT Assets 6
3.1 Cloning the Existing iPhone Class 6
3.2 Adding a ADS User Data Field to the xiPhone Class 7
3.3 Creating a New IT Asset of the xiPhone Class – Creating a Mobile_Devices Folder 8
3.4 Creating a New IT Asset of the xiPhone Class – Creating a New Asset (1) 9
3.5 Creating a New IT Asset of the xiPhone Class – Creating a New Asset (2) 10
4. Creating the User System Assignment Report 11

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.

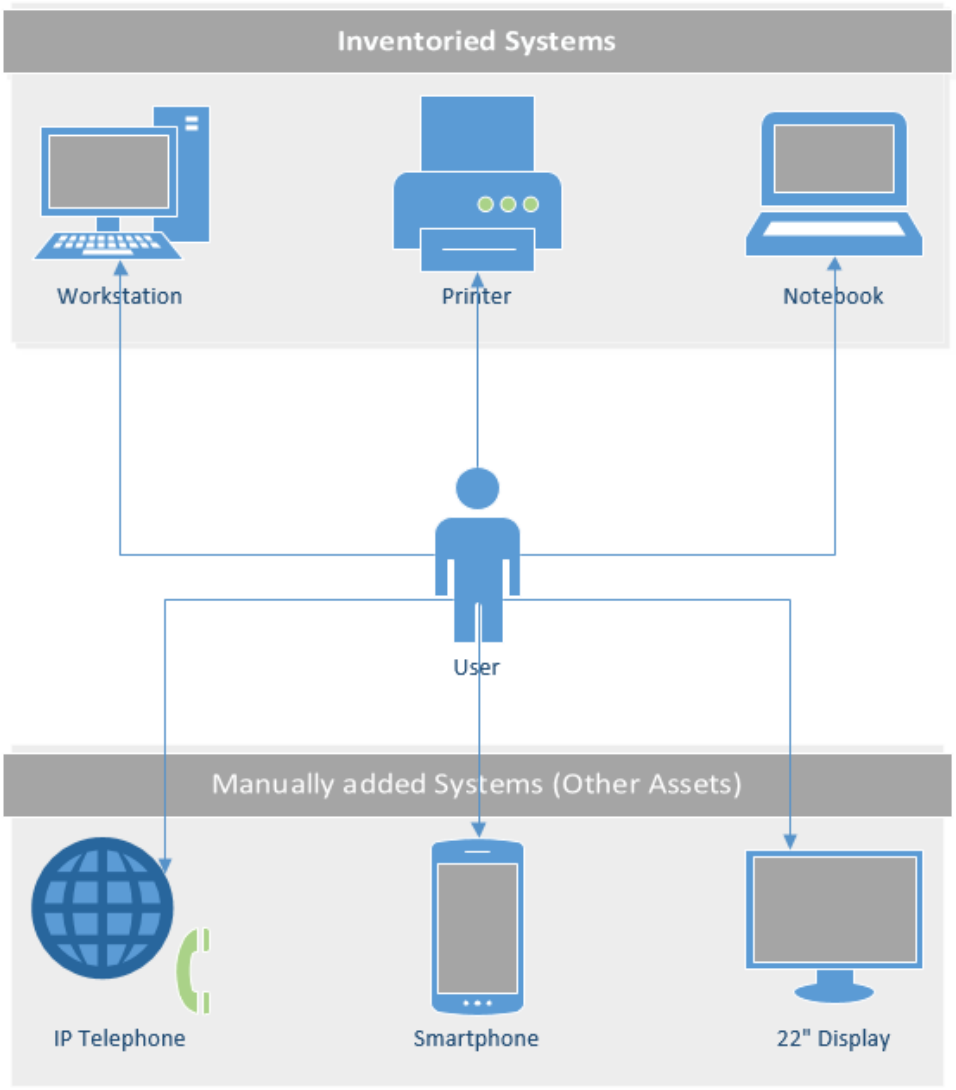

Fig. 1 – Schematic representation of a user and his / her assets

2. Assigning Automatically Inventoried Systems to an ADS User

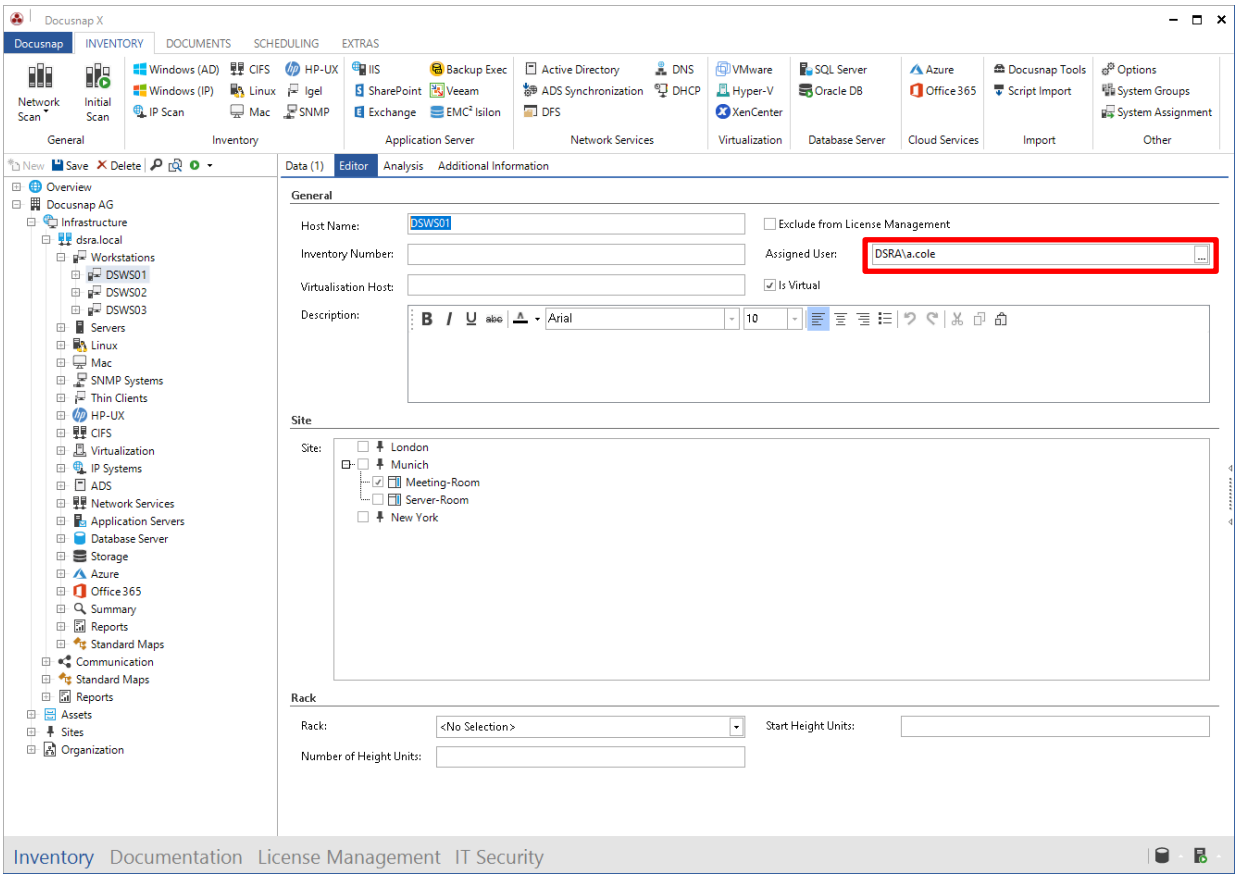

Fig. 2 – Assigning automatically recorded systems to an ADS user

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 "DSWS01" 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 under *Options > Docusnap Management > IT Assets > Manage IT Assets*. This action is necessary as the default iPhone class is missing the ADS User Assignment data field. End users cannot modify any of the predefined IT assets. This is why we need to clone the iPhone class, thus creating the new xiPhone class.

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

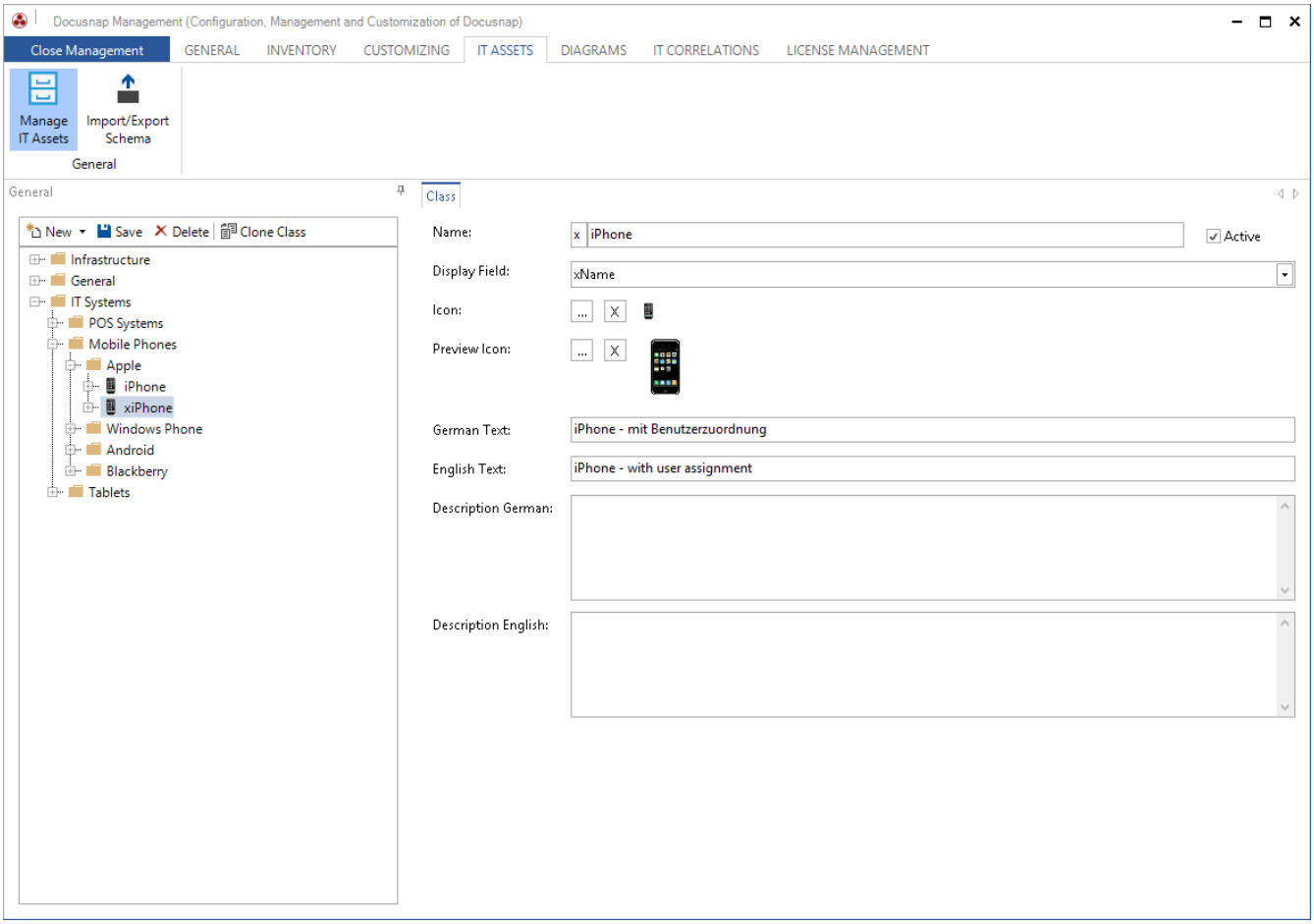

Fig. 3 – Cloning the existing iPhone class

3.2 Adding a ADS User Data Field 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 shown in the screenshot below)

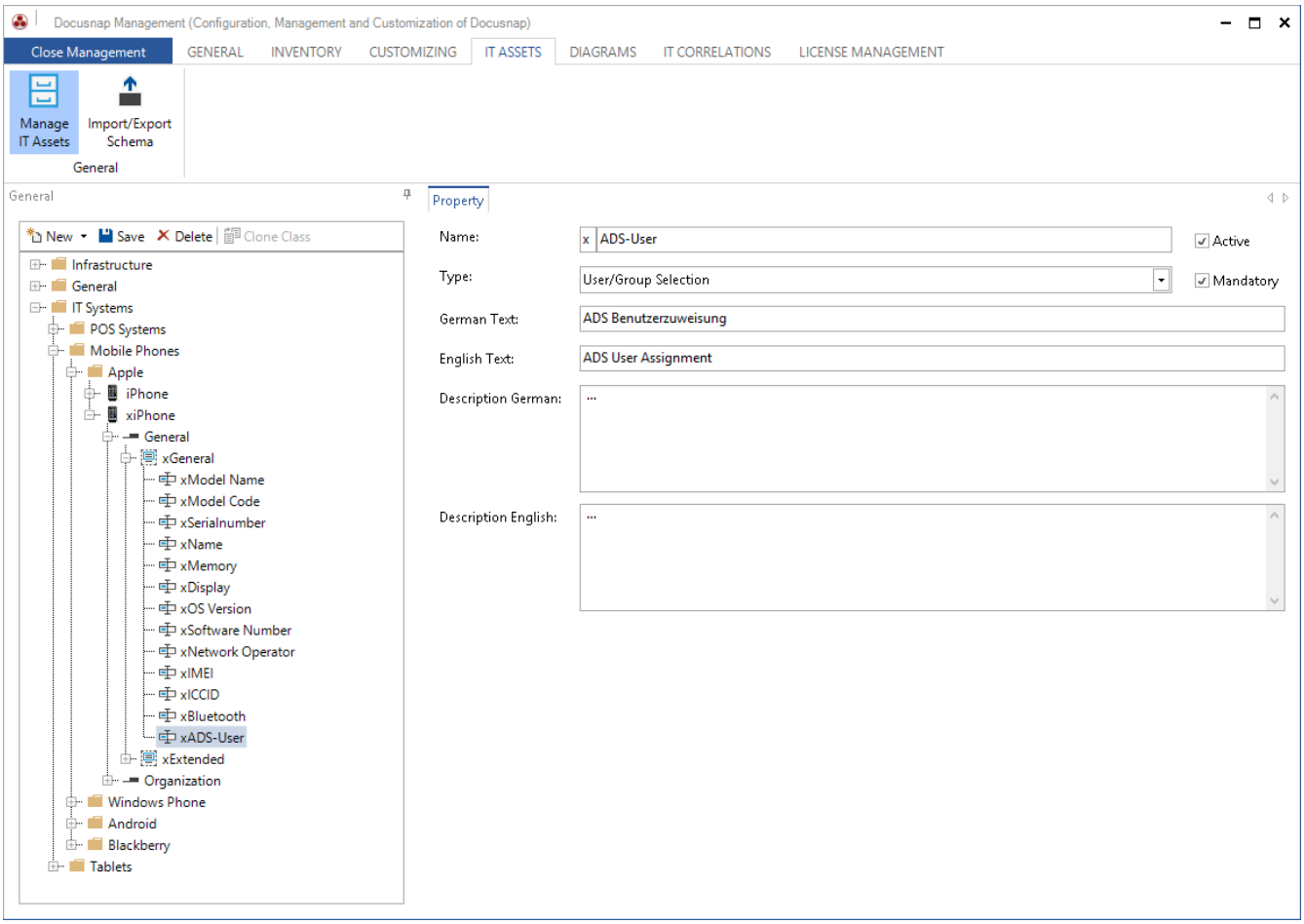

Fig. 4 – Creating the ADS User data field

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”.

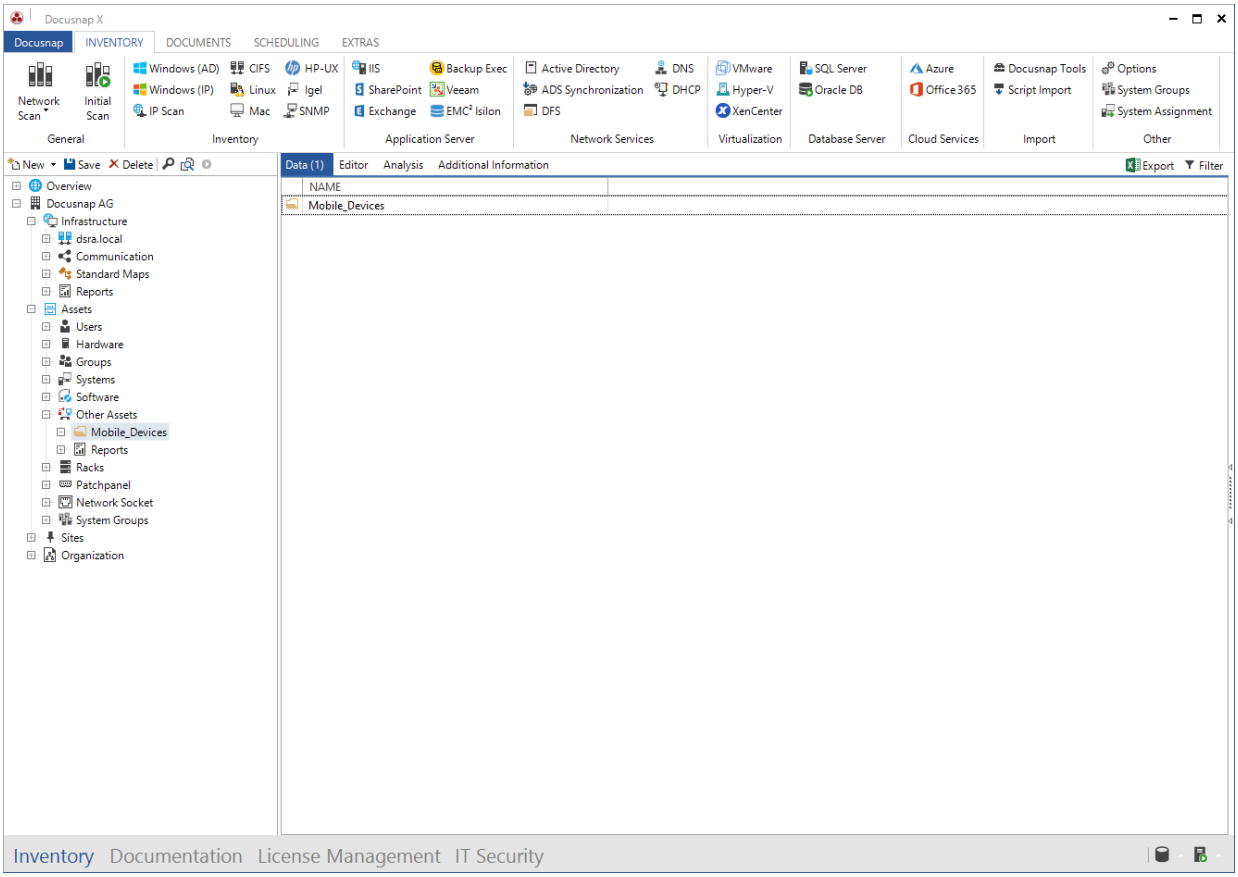

Fig. 5 – Creating the Mobile_Devices folder under “Other Assets”

3.4 Creating a New IT Asset of the xiPhone Class – Creating a New Asset (1)

Right-click, select "Create IT Systems" and navigate to the previously created "iPhone - with user assignment" class.

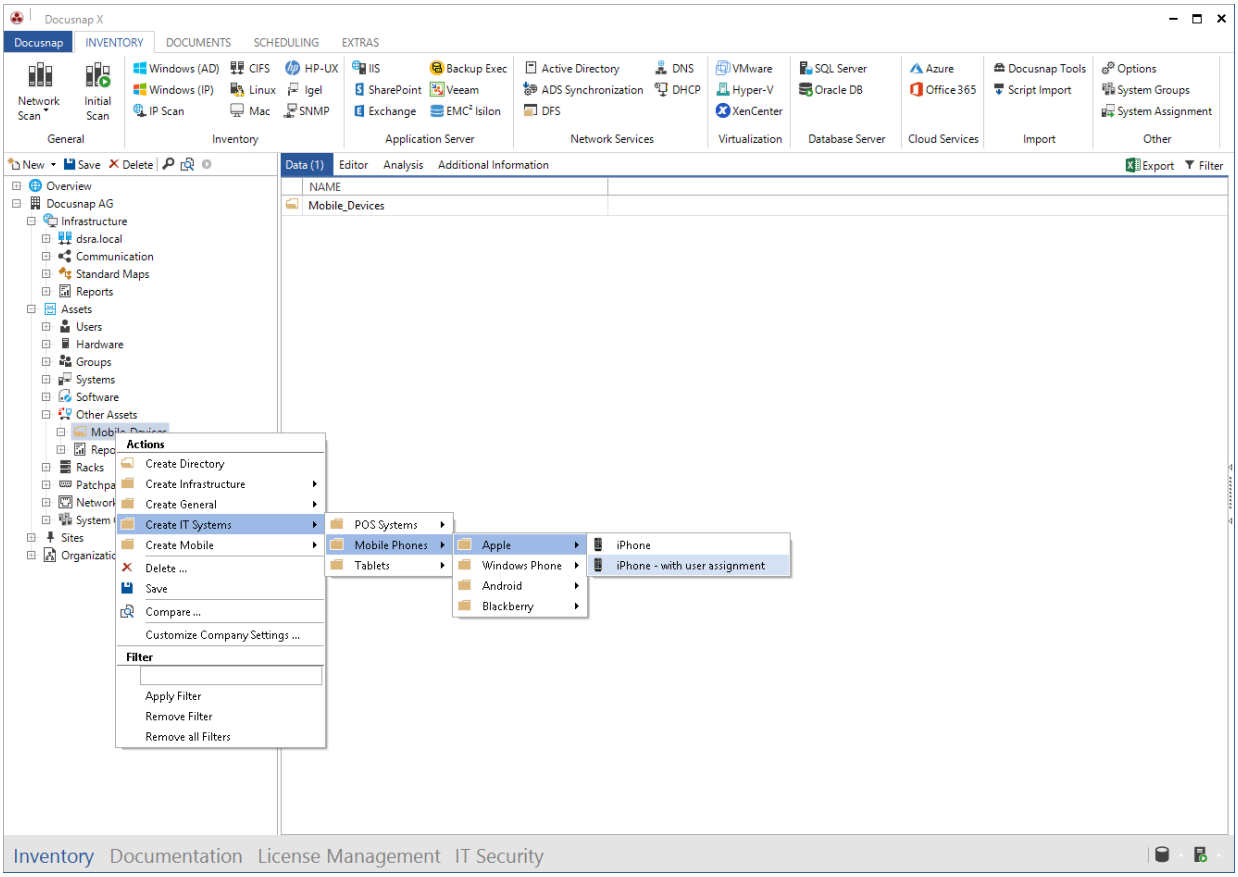

Fig. 6 – New object of the "iPhone – with user assignment" class

3.5 Creating a New IT Asset of the xiPhone Class – Creating a New Asset (2)

Now, create the desired IT asset and enter the all required values.

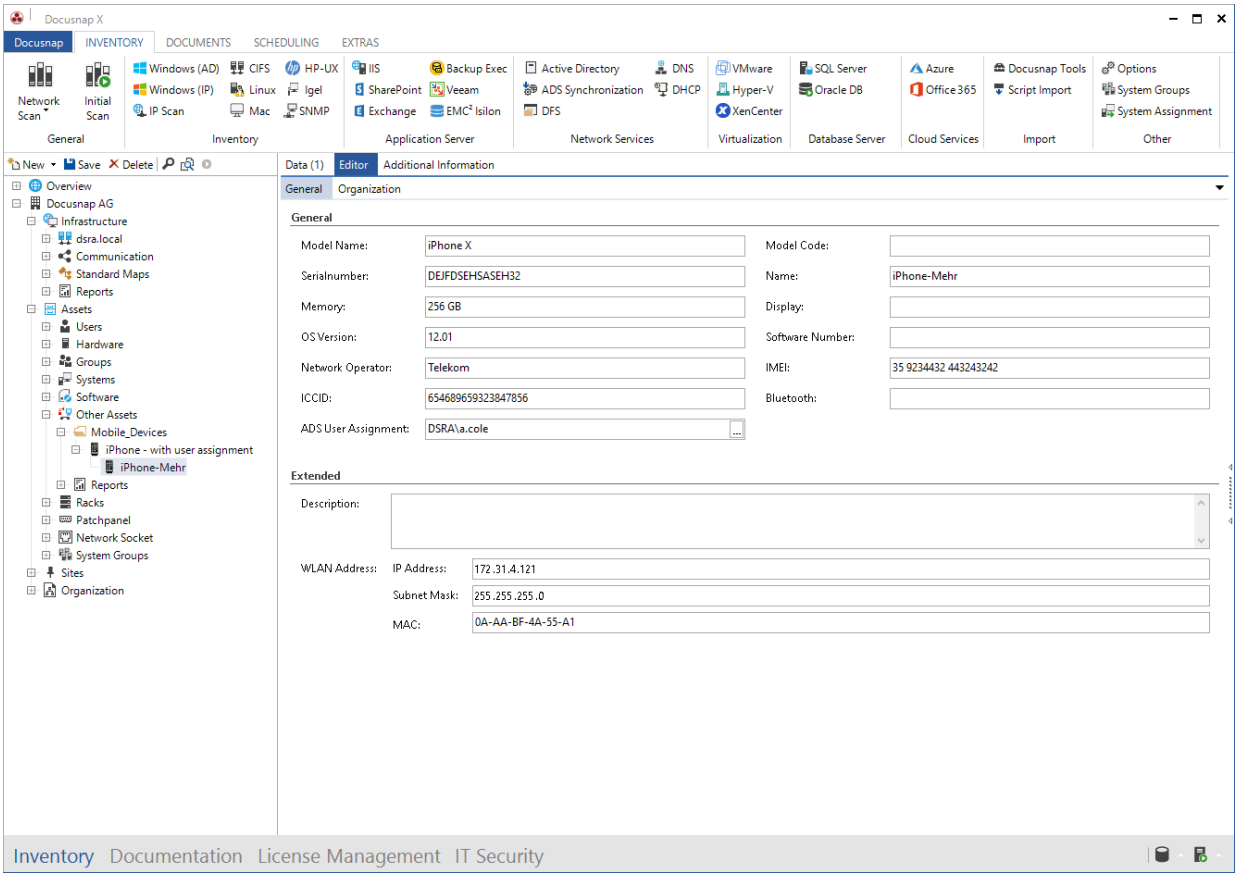

Fig. 7 – Creating a new iPhone asset for Heiner Mehr

4. Creating the User System Assignment Report

Under Infrastructure > Reports > Management, there are two variants of the “User System Assignment” report. Before Docusnap creates the actual report, a dialog appears that enables you to select one or more ADS users for output.

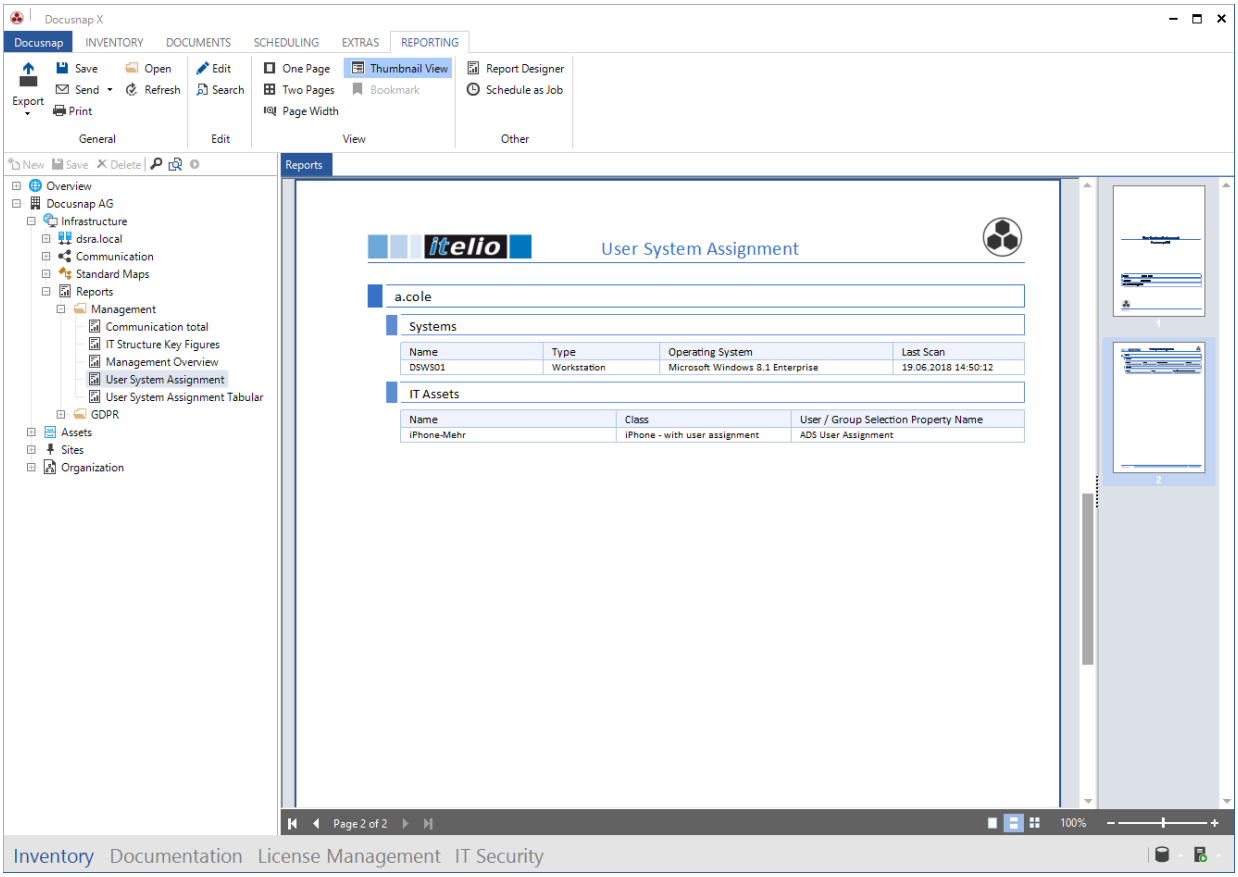

Fig. 8 – Creating the "User System Assignment” report

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.

LIST OF FIGURES

FIG. 1 – SCHEMATIC REPRESENTATION OF A USER AND HIS / HER ASSETS 4
FIG. 2 – ASSIGNING AUTOMATICALLY RECORDED SYSTEMS TO AN ADS USER 5
FIG. 3 – CLONING THE EXISTING IPHONE CLASS 6
FIG. 4 – CREATING THE ADS USER DATA FIELD 7
FIG. 5 – CREATING THE MOBILE_DEVICES FOLDER UNDER "OTHER ASSETS" 8
FIG. 6 – NEW OBJECT OF THE "IPHONE – WITH USER ASSIGNMENT" CLASS 9
FIG. 7 – CREATING A NEW IPHONE ASSET FOR HEINER MEHR 10
FIG. 8 – CREATING THE "USER SYSTEM ASSIGNMENT" REPORT 11

VERSION HISTORY

Date	Description
December 06, 2017	Initial version
October 24, 2018	Screenshots adapted

© itelio GmbH - www.itelio.com