



Additional Information

Adding Additional Information to DocuSnap

TITLE	Additional Information
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1. Introduction

In order to use Docusnap as the central application for IT documentation, it is necessary to be able to add or extend systems, users, clients, locations, etc. with additional information.

This additional information (e.g. maintenance contracts, installation documentation) can be assigned to any number of objects in Docusnap.

The following additional information types are available in Docusnap:

- Comments
- Financial data
- contracts
- Passwords
- Tasks

In addition to the information that the different types of additional information can hold, it is also possible to store file attachments in the additional information.

Examples of use in practice here are, for example:

- Comments:
 - Changes to systems
 - Installation documentation
- Financial Data
 - Invoices
 - With storage of invoice file as attachment
- Contracts
 - Hardware maintenance contracts
 - With storage of the contract file / CarePack as attachment
 - Software maintenance contracts
 - With storage of the contract file as attachment
 - Other contracts - each with notifications before expiration of the contract
- Passwords
 - Passwords to central web accesses
 - Passwords of service and database users
- Tasks
 - Exchange of certificates with notification

2. Additional Information – General

Additional information can be assigned to objects in Docusnap. For example, inventoried systems, users, groups, and contacts. Furthermore also licenses, processes, services and self-created other assets.

An additional information can be added when an object is selected within the data tree - Open Additional Information tab - +New.

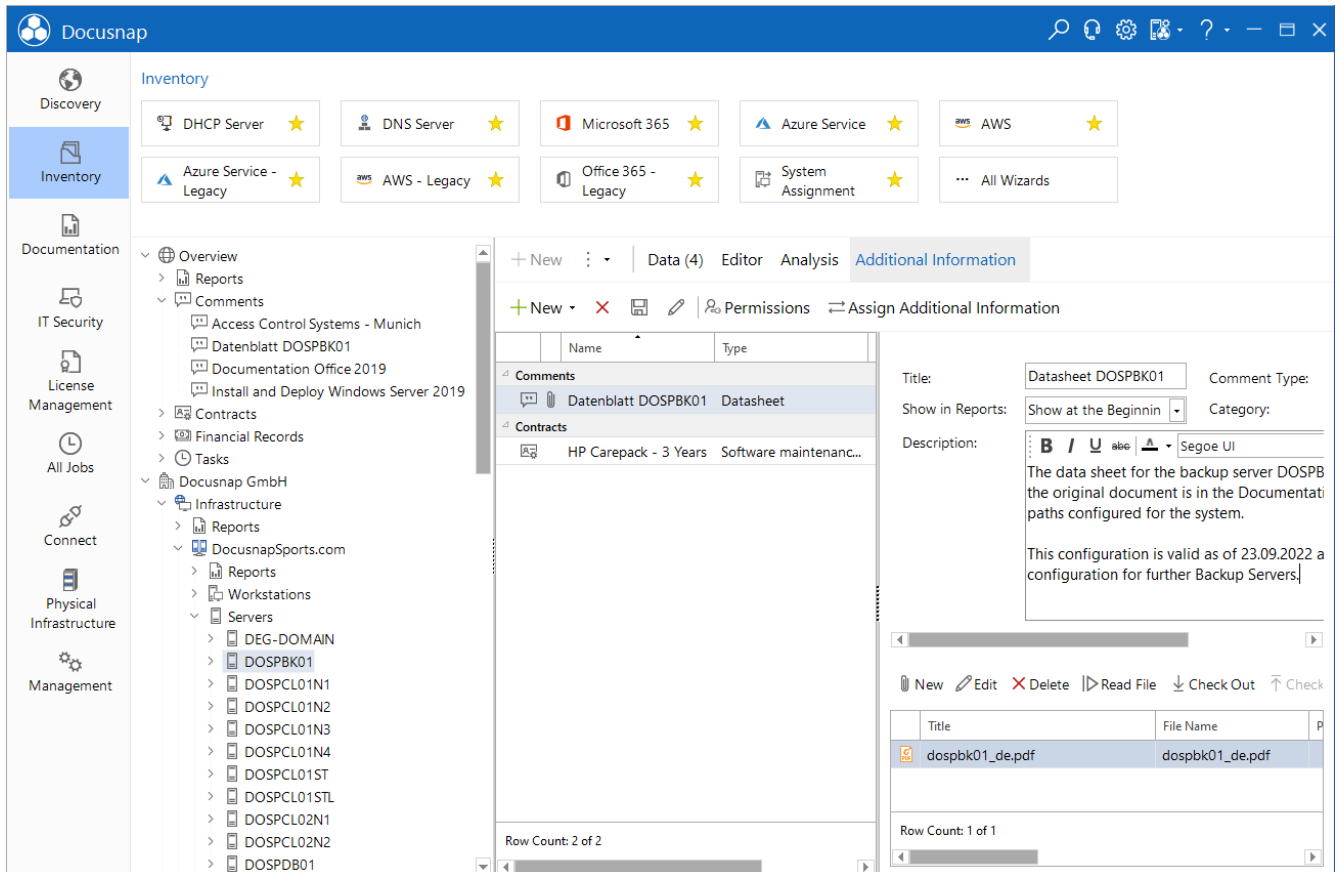


Fig. 1 - Adding additional information

Additional information can also be created when you switch to the overview in the tree structure. Select the additional information type and choose +New. Here, the additional information is not yet assigned to an object. The assignment to an object takes place when the detail data is specified.

It is not mandatory that additional information is assigned to objects. It is recommended! If a direct assignment is not possible, simply assign the additional information to your company / client.

Different fields are available as detailed data depending on the additional information type. The following fields are always available:

- Title
- Type
 - Specifies the additional information type further
 - It is managed in Administration - General - Additional information.
- Show in report
 - Defines whether the additional information is output when creating data sheets
 - The option is not available for passwords
- Category (authorization category)
 - The access to the additional information can be restricted via the categories
 - Further information in [HowTo: User administration](#)
- Attachments
 - Documents and files can be added to the additional information as attachments
 - Invoices, contract documents, manuals etc.
 - The files are stored in the database
- Assigned objects
 - Links the additional information with existing objects
 - An additional information can be assigned to several objects

3. Comments

This additional information is the most universal. The description field allows you to create formatted comments. Typical examples are maintenance plans, change logs, installation instructions and documents from the data security environment.

4. Financial documents

This additional information allows to enrich objects with commercial information. There are data fields for acquisition, depreciation and cost accounting.

5. Passwords

The additional information Passwords allows to store passwords encrypted in the Docusnap database. Especially for this additional information it can be useful to use the Category data field. Thus, access is possible only for a selected group of people.

For the creation and administration of passwords, the encryption module is required. This file takes care of the encryption and decryption of passwords. The file is usually set up during the initial configuration of Docusnap. In the options (title bar - cogwheel) - General - Database you can check or adjust the storage path.

If no file has been created yet, this can be done now.

ATTENTION: Without the file, the passwords can no longer be decrypted from the database!

6. Contracts

Contracts have special data fields for the contact data of the contract partner, the contract number, completion date and end date. A typical example are maintenance contracts for servers.

In addition to the method described above, contracts can also be created in license management when creating new licenses.

In addition, a start date and an end date can be stored. This makes it possible to notify which contracts will expire within the next three months, for example. More information about the message definition is documented in the HowTo Message Definition in the Docusnap Knowledge Base.

7. Tasks

The additional information Task is suitable for storing tasks in Docusnap. By message definition, an automatic notification is made, on the reminder date, when the task is due. A typical use case is the periodic maintenance of UPS devices.

More information about message definition is documented in the HowTo Message Definition in the Docusnap Knowledge Base.

8. Additional information in Docusnap Web

Access to the additional information via Docusnap Web is also possible. This requires a working Docusnap Server configuration.

Additional information can be accessed in Docusnap Web via the organization. Access via the assigned object is also possible.

If an additional information contains attachments, these can be downloaded directly.

Passwords cannot be displayed in Docusnap Web!

LIST OF FIGURES

FIG. 1 - ADDING ADDITIONAL INFORMATION	5
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VERSION HISTORY

Date	Description
August 15, 2016	Version 0.1 – First draft
September 05, 2016	Version 1.0 – Screenshots adapted to the RTM version
September 15, 2016	Version 1.01 – Reference to section 2.1.4, Attachments corrected
October 24, 2018	Version 1.2 – Screenshots updated
April 27, 2020	Version 2.0 - Revision of the HowTo for Docusnap 11
December 30, 2022	Version 3.0 – Revision of the HowTo for Docusnap 12
November 13, 2023	Version 4.0 – Revision of the HowTo for Docusnap 13
