Other Assets

Creation and Add-on of other Assets

TITLE	Other Assets
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1. Introduction

In order to use Docusnap as the central application for IT documentation, it is necessary to create and manage other systems and devices relevant for documentation in Docusnap, besides those that Docusnap inventories automatically. For example, cell phones, projectors, local workstation printers. Emergency generators and air conditioners.

Docusnap already comes with several predefined other assets. These can be extended, supplemented, and duplicated as required. The input screens are automatically created by Docusnap.

Other assets can be used in concepts, relationships, reports, license management and maps.

2. Other Assets - General

2.1 Create Other Assets

Other assets are created within the tree structure

- Company - Assets - Other Assets

First of all, you always need a folder. Within the folder you can then create the Other Assets of the different classes.

There are already predefined asset classes:

- Emergency Power
- Extinguishing system
- Air conditioner
- Cell phones (Apple, Samsung etc.)

Create a new Other Asset by right-clicking on the previously created folder.

Now select the appropriate asset type from the existing categories.

Now the information can be entered via the input mask.

2.2 Analyze Other Assets - Reports and Maps

The created Other Assets can first be viewed in the data area, filtered, grouped and exported to Excel. To do this, right-click in the data area (tabular listing of assets).

Furthermore, two predefined reports are available:

- Asset Category
  Selection of the asset category with subsequent listing of the asset objects.
- Asset Objects
  Selection of asset objects to be listed in the report

Some predefined asset classes, as well as later newly created asset classes, can be provided with network information: IP address, subnet mask and MAC address.

This information ensures that the other assets will also be listed in the plans

- Network and Topology Maps

as well as in some reports and lists - including

- IPv4 summary (Company - Reports - Infrastructures)
- Topology list (Domain - Summary)
- Switches and VLAN overviews (Domain - Reports - Infrastructure Network)

3. Own Assets

Additional properties can be added to the existing asset classes. New asset classes can also be created.

The management of the asset classes takes place in the administration of Docusnap

- Administration - IT Assets - Manage IT Assets

The assets and their management are structured as follows

- Category / Subcategory
    - Categories and subcategories are used to organize the assets.
    - Existing categories can be used or new ones can be created
- Classes
    - Classes represent the actual assets
    - Asset classes are defined in the administration
    - Asset objects are then created in the tree structure
- Tabs
    - Tabs, below which the properties and input fields are separated from each other
- Sections
    - Grouping of properties and input fields within a tab
- Properties
    - Properties define the values of assets
    - An overview and description of all types that can be defined in a property can be found in the Configuration Manual and in the Chapter Properties of Assets.

3.1 Extend existing classes

Select the class to be extended. In this example, the class of iPhones will be extended to include a user. Another example would be an inventory number.

- Mobile Phones - Apple - iPhone - General - General
- Right click - Create property
  - o *Name*: (x)User
  - o *Type*: User/Group selection (selection of inventoried AD users and groups).
    An overview and description of all types that can be defined in a property can be found in the Configuration Manual and in the Chapter Properties of Assets
  - o *German Text*: Benutzer
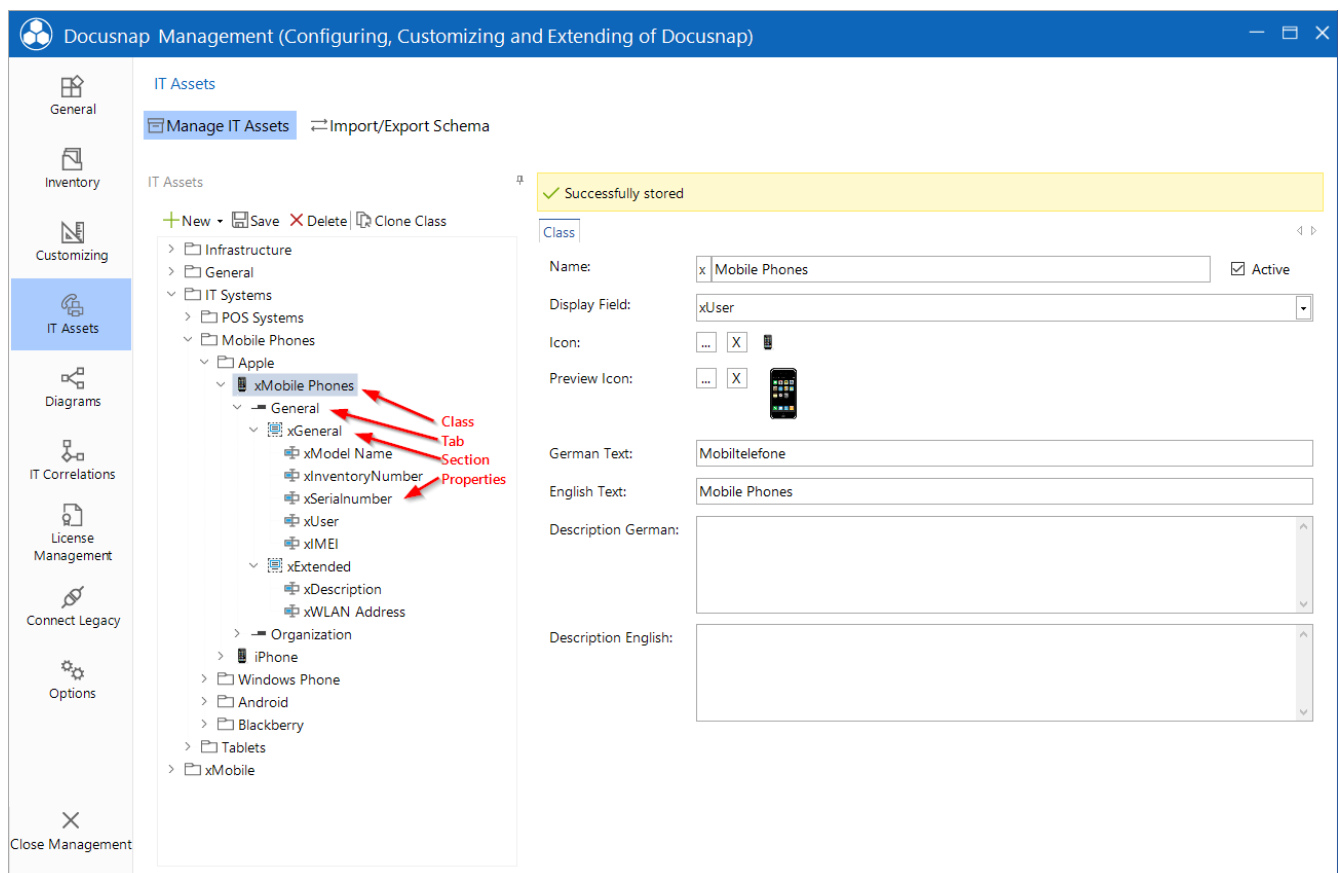 - O *English Text:* User

Figure 1 - Structure of other assets in administration

3.2 Creating a new class

Before creating a new class, check if one of the existing classes can serve as a template. Existing classes can be cloned.

For example, the iPhone class could be used as a template for a new class "Mobile Phones". The class of the iPhones has here the necessary fields and can be extended by additional ones. Furthermore, you can also delete existing properties after cloning. Before deleting this was not possible!

Cloned and newly created classes, as well as sections and properties, are automatically saved with a preceding x. This x indicates that it is a category or class created by the user.

Custom icons could also be used for asset classes. These should have a size of 100 x 100 pixels and the preview icon 16 x 16 pixels.

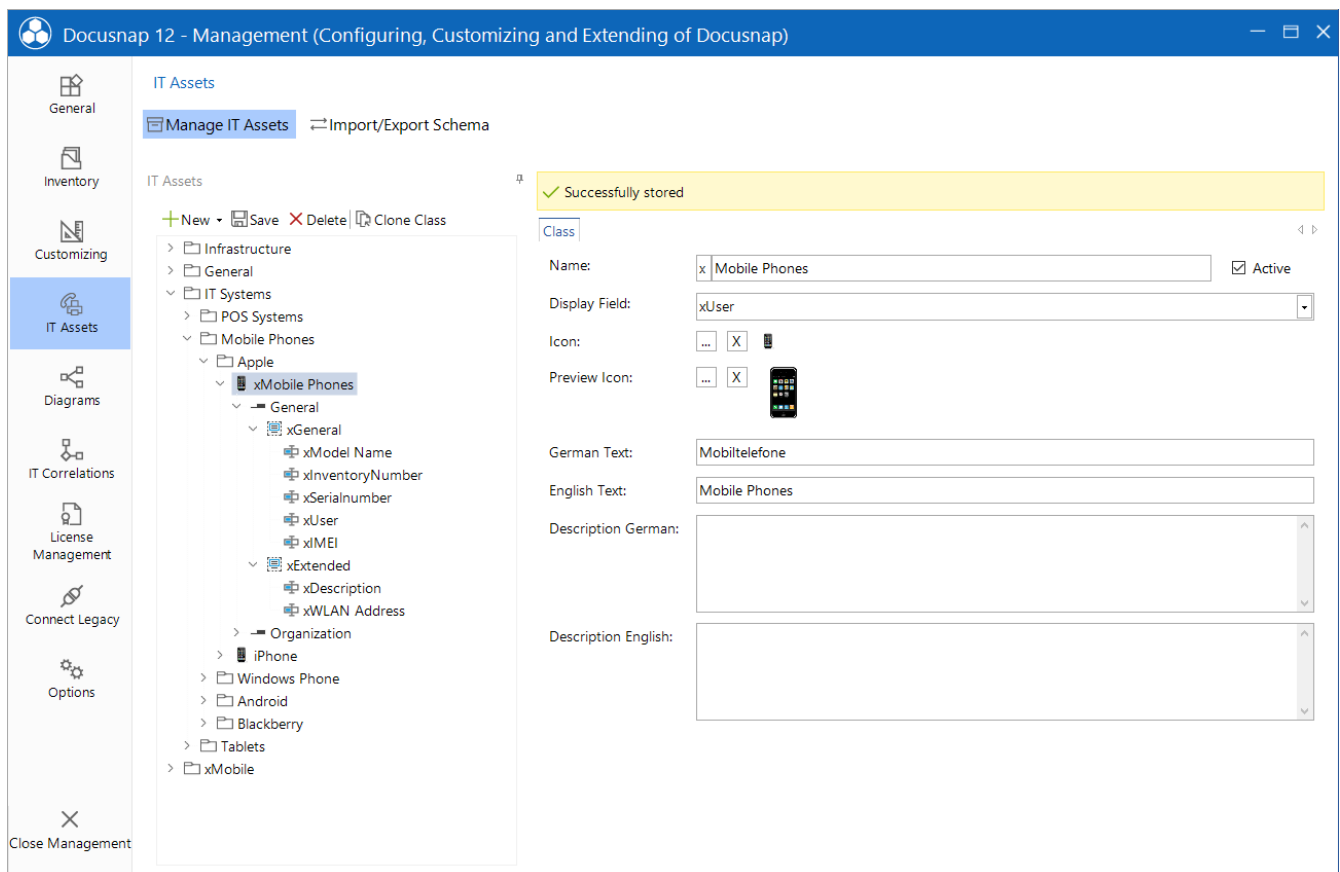For newly created icons, be sure to set the display field after creating the properties!

Figure 2 - Cloned and customized asset class

3.3 Properties of assets

Properties are used to define the values for the IT assets. Properties are created below a section. The following properties can be selected for an IT asset in Docusnap:

3.3.1 Date

If Date is selected as the type, then a date selection is made available in the editor section.

3.3.2 Decimal

If Decimal is selected as type, only decimal numbers can be inserted into the text field.

In addition, a divisor can be specified to convert numerical values. For example, a factor of 1024 would convert a value from bytes to kilobytes.

Number formats can also be specified. Valid wildcards are the # sign for arbitrary numerical values and the digit 0 for numerical values, which are padded with leading 0 if they are too small.

3.3.3 List

When a list is selected, a combo box is added as an input mask. The values of the list can be added via self-created list entries or via a list reference. With a list reference, a database table is used as the data source. The reference to the table is done by entering [table name] and the reference to the column is done by entering the name.

3.3.4 Yes / No

For a property with the Yes/No type, a check box is displayed in the editor area.

3.3.5 Multiline text

If the type Multiline text is selected, text without length limitation can be entered.

3.3.6 Network information

If the Network Information type is selected, the IP address, subnet mask and MAC address can be entered for this IT asset. This information can then also be included in the network plans.

3.3.7 Text

If the type Text is selected, a text field is displayed in the editor area.

3.3.8 Number

If Number is selected as type, only whole numbers can be inserted into the text field.

In addition, a divisor for converting numerical values can be specified.

Number format: Here, formatting for number values can be done according to standard conventions, including specification of a unit. Valid placeholders are the # sign for arbitrary numerical values and the digit 0 for numerical values, which are padded with leading 0 if they are too small.

3.3.9 User / group selection

Through the type ADS Assignment it is possible to assign users and groups of the ADDS inventory to the created IT assets.

3.3.10 Number server

In the number server it is possible to define a consecutive number that will be used when creating the IT assets. If the number server is selected as the type, a created number server can be selected under Settings.

The creation and management of a number server can be found in the configuration manual.

4. CSV Import

Docusnap provides a CSV data import. Data imports via CSV files can be performed for existing tables, Other Assets and for Additional Information. You can also work with CSV imports in the physical infrastructure area.

The CSV file is decisive for the import. The columns of the CSV file should always have headings, otherwise no assignment of the data of the CSV file to the target properties can be made.

In the course of the CSV import, you can select whether the import should be performed as an update. If already imported data should be updated or new data should be compared with already imported data, Import as update must be activated. A comparison field will then be required. The comparison field (e.g. serial number, inventory number) is used to check whether the entry already exists and is therefore only to be updated, or whether a new entry is to be created.

4.1 Preparation of the CSV file

Create or let create a CSV file that has the same columns / properties as your asset class.

For example, the following, which corresponds to the properties on the cloned / created class for cell phones in Figure 2:

Model Name	Serialnumber	IMEI	User	Inventorynumber
iPhone 14 Pro Max	12345	123456789012345	A. Cole	M-000015
Samsung Galaxy S22	67890	543210987654321	F. Brettschneider	M-000016
Samsung Galaxy S22+	111223	102938475610293	L. Bennett	M-000017
iPhone 14 Pro Max	141516	112233445566778	E. Webster	M-000018

4.2 Perform CSV-Import

Start the CSV import wizard in the All jobs - All wizards - CSV import section.

In **Step 1 - Import**, select the destination where you want to import to. In this example it is

- IT Assets - Class Selection (Mobile Phones)

In **Step 2 - Source** select the location of the CSV file

- Activate the first row as a header
- Check in the preview if the CSV file is displayed correctly
  - Adjustments can be made by selecting the separator character

In **Step 3** - Destination select the company and folder you want to import to. The folder must be already created.

In **Step 4 - Data Assignment**, CSV values are now mapped to the target properties - in this case assigned to the existing columns of the asset class.

- The fields marked with a yellow triangle are mandatory fields and must be assigned.
- At least the display field is a mandatory field. Others may have been defined by you
- **Import as update**
  - o If data already exists in the target that is to be updated, the import must be performed as an update. Without this option, you will otherwise have corresponding duplicates!

In **Step 5 - Update** you now define the comparison field, which is used to check whether the data set to be imported already exists and is therefore updated, or newly added.

- In the Update Settings you can determine whether
  - o Existing records will be updated and new records will be added or
  - o Only new records will be added.

In **Step 6 - Scheduling** you can now schedule the CSV import with the previously set information

- The scheduled CSV import is performed by the Docusnap Server service
  - o The source selected in step 2 must be accessible by the Docusnap Server!
    - ▪ It is recommended to store the CSV files locally on the Docusnap Server.
- At each execution it is checked whether the source selected in step 2 is available
  - o If the CSV file is available, the import is performed and the CSV file is moved to an archive folder
  - o If no CSV file is available at the next execution, nothing will be imported.
    - ▪ This can be seen in the summary of the job
      (Successfully completed - no files had to be imported).

5. Scheme export and import

Self-created asset classes can be exported and imported. This allows, for example, the transfer from a test environment to a production environment.

The import and export takes place in the administration of Docusnap

- Administration - IT Assets - Schema Import/Export

When importing definitions, you first select the file and then the asset classes to be imported.

In definition export, you first select the asset classes to be exported, then where the file will be saved, and then the export is performed via Export.

LIST OF FIGURES

VERSION HISTORY

Date	Description
November 24, 2016	Version 1.0 – HowTo Created
October 24, 2018	Version 1.1 – Screenshots adapted
April 28, 2020	Version 2.0 - Revision of the HowTos for Docusnap 11
January 02, 2023	Version 3.0 – Revision of the HowTo for Docusnap 12