



Site Assignment of Systems

The different possibilities of location assignment

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1. INTRODUCTION

This HowTo describes the possibilities of the location assignment. Site mapping is a prerequisite for creating site-specific reports such as plans (network, topology plans) or textual reports (Docusnap Connect) with a corresponding site filter. In addition, this is required to map the physical infrastructure using Docusnap. Both manual and automatic site mappings are addressed.

Locations can be assigned to the following systems.

- Workstations
- Servers
- Linux
- Mac
- SNMP
- Thin Clients
- HP-UX
- CIFS
- IP-Systems
- Other Assets

2. PREREQUISITES

Docusnap offers the possibility to map your location structure. These must be created in advance. For more information, please refer to our user manual.

[Manage Sites \(docusnap.com\)](#)

3. SITE ALLOCATION

Locations to systems can be assigned in different ways. The various options are explained in the following chapters. A distinction is made between automatic (assignment criteria and DDS) and manual (input mask and system assignment).

If both an assignment criterion and a DDS have been set up for a location, the assignment of the assignment criterion takes effect.

3.1 ACTIVATE AUTOMATIC LOCATION ASSIGNMENT

The automatic location assignment of systems to the respective locations based on the assignment criteria described in the following chapter is deactivated by default! You can activate the automatic location assignment in the options:

- Options (cogwheel in the title bar) - Inventory - General - Activate automatic location assignment

If this option is activated, the systems are moved between the locations if a new assignment criterion applies during the inventory or the inventory is carried out via a discovery service. This behavior can be adjusted - further information can be found in the following chapter: [Ignore automatic location assignment](#).

3.2 ASSIGNMENT CRITERIA

Assignment criteria can be used to assign systems to specific locations. The assignment criteria can be found at the following location:

- Management – Inventory - Assignment Criteria
- Inventory – All Wizards – System Assignment

There, based on various criteria, you define rules that can be applied to automatically assign systems to locations.

These criteria include:

- ADDS Container
- Domain
- Network
 - The networks must be specified in the CIDR notation - e.g. 192.168.0.0/24
- System name
- Length system name
- System type

After defining the rule, it must be assigned to a location. The assignment is done in the system assignment wizard:

- Inventory – All Wizards – System Assignment

3.3 DOCUSNAP DISCOVERY SERVICE

Systems can also be automatically assigned to a site when using a Docusnap Discovery Service. For this purpose, a corresponding discovery service is configured and a location is assigned to it. Thus, systems that are inventoried via this discovery service are now assigned to the corresponding location.

3.4 DATA EDIT

Systems can be assigned to a site via the corresponding input mask. To do this, select any system and open its Editor. Now select the site.

If you have manually assigned systems to a site, you should ignore the automatic site assignment for these systems. If this option is active for, these systems remain assigned to the site, even if another site assignment would take effect.

3.5 SYSTEM ASSIGNMENT

Systems can be manually assigned to a location in the system assignment. This is particularly suitable if several systems have to be assigned.

- Inventory – All Wizards – System Assignment

Please note that only systems that have not yet been assigned to a location are available for selection. All other systems are not available for selection and must first be detached from the existing location.

4. IGNORE AUTOMATIC SITE ASSIGNMENT

4.1 EDITOR

In the editor of a system, you can ignore the automatic site assignment of systems. To do this, switch to the editor of the system and activate the option ignore automatic site assignment.

You should deactivate this option for systems that you have assigned manually, for example to a room.

4.2 MASS EDITING

In addition to the previously described method via the editor, you can also use an assistant for mass editing. To do this, change in the tree structure to a desired system type, e.g. workstations.

Now select the desired systems via the checkboxes that are available in front of the name of a workstation.

Select Edit site assignment - Ignore automatic site assignment for all selected systems.

You can also recognise the set setting by the column Ignore automatic site assignment.

5. USE IN THE PHYSICAL INFRASTRUCTURE

5.1 ASSIGNING SYSTEMS TO A SITE

Systems can also be assigned to a site in the Editor of the physical infrastructure:

- Physical infrastructure editor - Sites - Site - Assign systems

Only systems that are not yet assigned to a site or that are already assigned to the selected site are displayed in the selection list.

If the site is set in this dialogue, the option to ignore the automatic site assignment is also set automatically (see [chapter 4](#)).

5.2 LINKING SYSTEMS AND ELEMENTS IN THE PHYSICAL INFRASTRUCTURE

Systems can be linked to elements of the physical infrastructure, e.g. as a server or switch in a rack or as a PC at a location.

If these systems are manually or automatically assigned to another site, the linked element of the physical infrastructure is not automatically assigned to the new site. The connection between the element and the system is then deleted.

VERSION HISTORY

Date	Description
12.08.2021	Version 1.0 – HowTo created
16.12.2022	Version 2.0 – Revision of the HowTo for Docusnap 12
04.12.2023	Version 3.0 - Revision of the HowTo due to changes in assignment
29.05.2024	Version 3.1 – Chapter “Use in the physical infrastructure” was added
