Docusnap®

Docusnap 6.3 - Getting Started

Installing and Configuring Docusnap 6.3

TITLE	Docusnap 6.3 – Getting Started
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1. INTRODUCTION

This document describes how to get started with Docusnap and explains some essentials you need to familiarize yourself with this software.

The Basics section explains important terms and references download and documentation sources for Docusnap. In addition, several support options are pointed out.

This document further lists the prerequisites for using Docusnap and explains the initial configuration.

Finally, a functional test, i.e. a Windows inventory scan, is performed.

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2. BASICS

2.1 GLOSSARY OF TERMS

Docusnap Server

Docusnap Server is a Windows service that you can use to perform inventory scans, import inventory data, create documentation and send out notifications via e-mail. Docusnap Server enables automatic completion of these tasks at freely configurable times.

2.2 DOWNLOAD

The latest Docusnap setup files and the associated documentation can be downloaded at

http://www.docusnap.com/my-docusnap/softwaredownload

2.3 DOCUMENTATION

For Docusnap, a User Manual and a Configuration Manual are available.

The User Manual covers common tasks with Docusnap. It explains the basic functionality and how to use the individual Docusnap features in your daily work.

The Configuration Manual covers advanced topics such as management, customization, and extension of Docusnap. It also provides details on the filing locations of your Docusnap installation and the database structures.

You can either download the latest version of the manuals at http://www.docusnap.com/en/support/manuals or view them online.

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In addition, you can get context-related help for almost every feature in Docusnap by pressing the F1 key. The context help references the online documentation, therefore it requires Internet access.

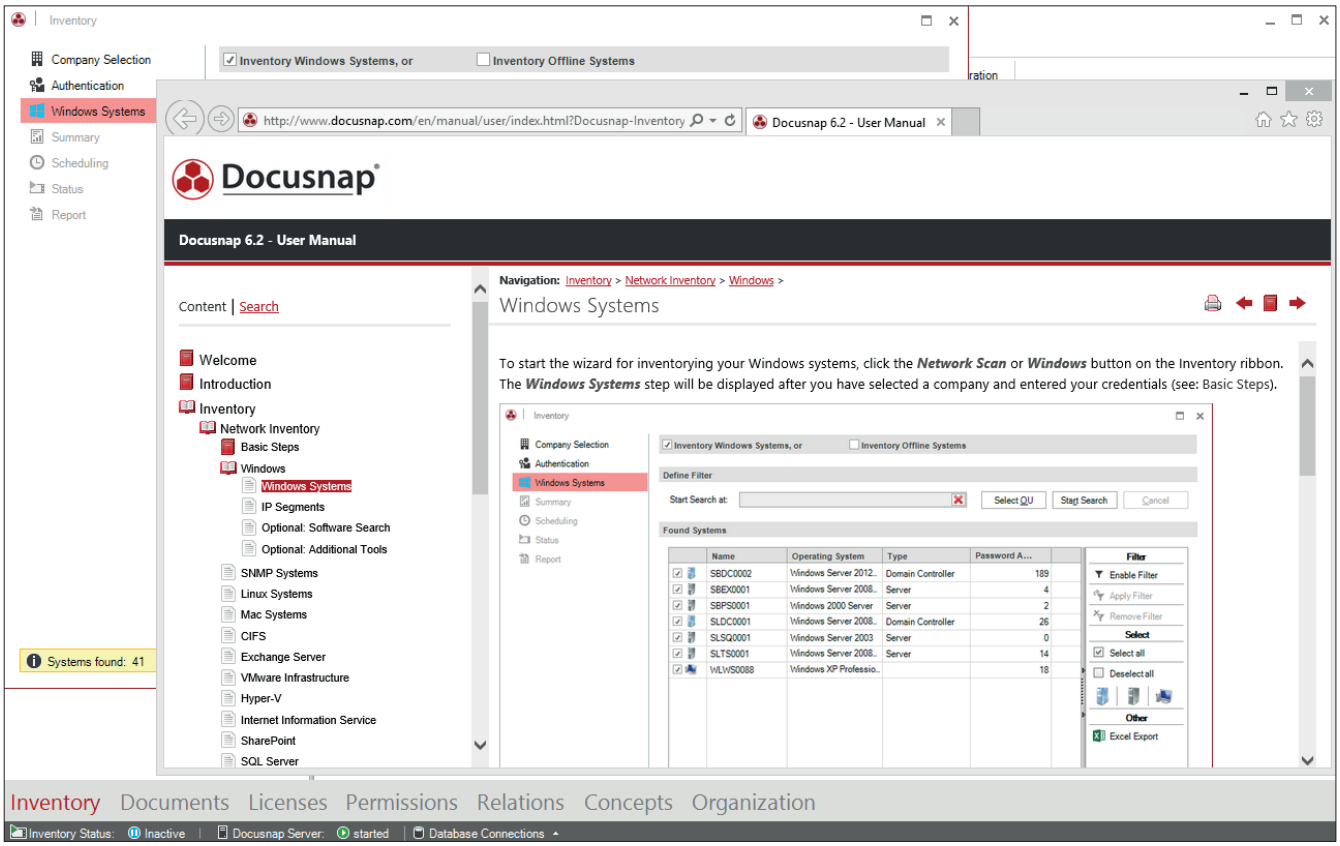

Fig 1 – F1 help information opened from within the Windows wizard

2.4 FORUM

The Docusnap forum where you can ask questions or request new features is available at http://www.docusnap.com/en/support/forum. Access to this forum requires registration. Once you are registered, you can easily log on to the forum. Together with the license or the demo version, each customer or prospect receives the corresponding credentials.

2.5 HOW TO

For advanced topics, we provide a collection of "How To" documents under http://www.docusnap.com/en/support/how-to. They contain hands-on tips and help for the solution of common problems.

2.6 SUPPORT

For individual questions, please contact our support team by e-mail at support@docusnap.com or by calling the following number: +49-8033-6978-4444.

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3. PREREQUISITES FOR USING DOCUSNAP

This section describes the prerequisites for the installation of Docusnap.

3.1 SYSTEM REQUIREMENTS

- .NET Framework 4.5.1 (.NET Framework 4.5.2 or higher recommended)
- Windows Vista SP2 and later or Windows Server 2008 or later
- at least 4GB RAM
- at least 2 CPU cores
- Screen resolution at least 1024x768
- Microsoft Visio 2007 Standard with Service Pack 2 or later

3.2 DATABASES

Docusnap relies on a database which stores the data collected by the inventory scan. Two different types of database can be used for this purpose: SQL Express LocalDB or SQL Server (Express, Standard, or Enterprise Server version 2005 or later).

3.2.1 SQL EXPRESS LOCALDB 2014

SQL Express LocalDB 2014 is a light version of SQL Express Server. It can be installed along with Docusnap. If you use SQL Express LocalDB 2014, some restrictions apply that will be mentioned below when comparing this version to SQL Server (Express).

Please note that it is not possible to use the Docusnap Server service to schedule jobs when a SQL Express LocalDB is used.

3.2.2 SQL SERVER (EXPRESS)

Before installing Docusnap, make sure that the installation of the SQL Server has been completed.

We recommend that you use the Microsoft SQL Server Express 2014 with tools. This server solution is free of charge and needs to be installed separately.

Download link for Microsoft SQL Server Express 2014 with tools (32 and 64 bit versions):
https://www.microsoft.com/en-us/download/details.aspx?id=42299

Unlike the paid SQL Server, Microsoft SQL Server Express supports only 1 physical processor, 1GB RAM, and a maximum database size of 10GB.

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3.2.2.1 CONFIGURING SQL SERVER (EXPRESS)

If you installed the SQL Server on a remote system, you need to configure the database server for remote access.

For this purpose, enable TCP/IP in the SQL Server Configuration Manager.

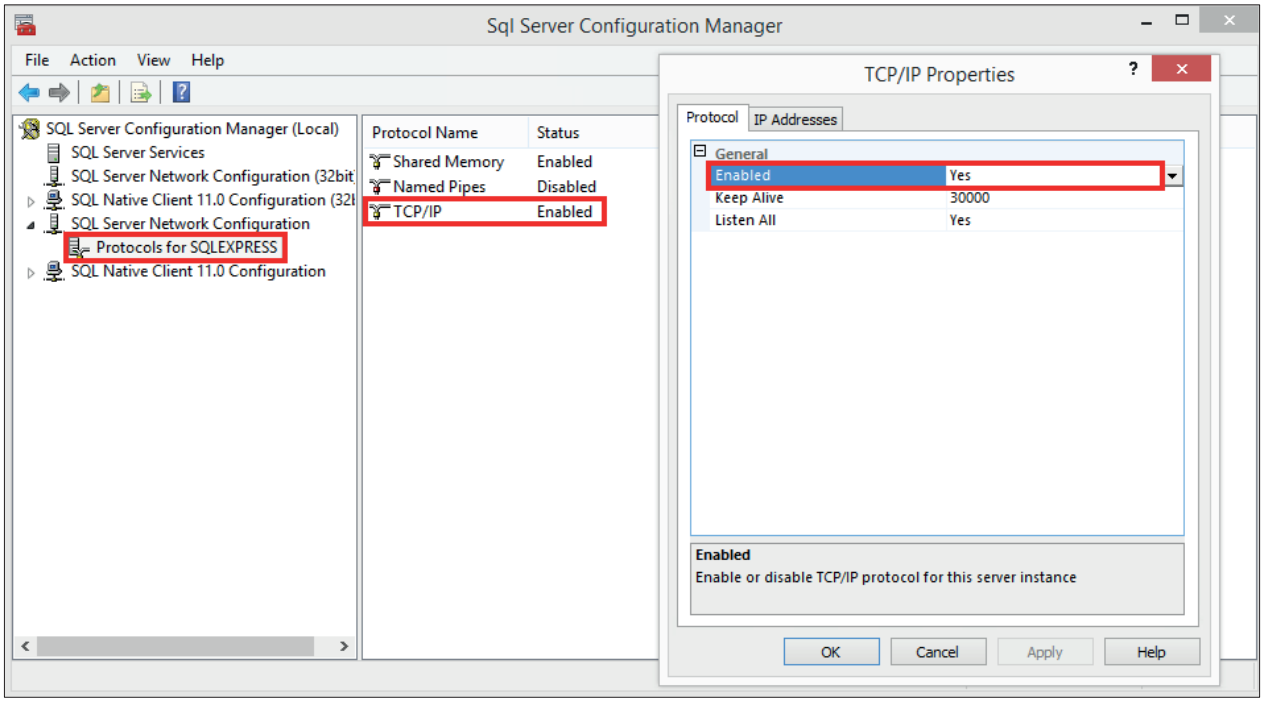

Fig. 2 – Enabling TCP/IP

In addition, make sure to start the SQL Server Browser service.

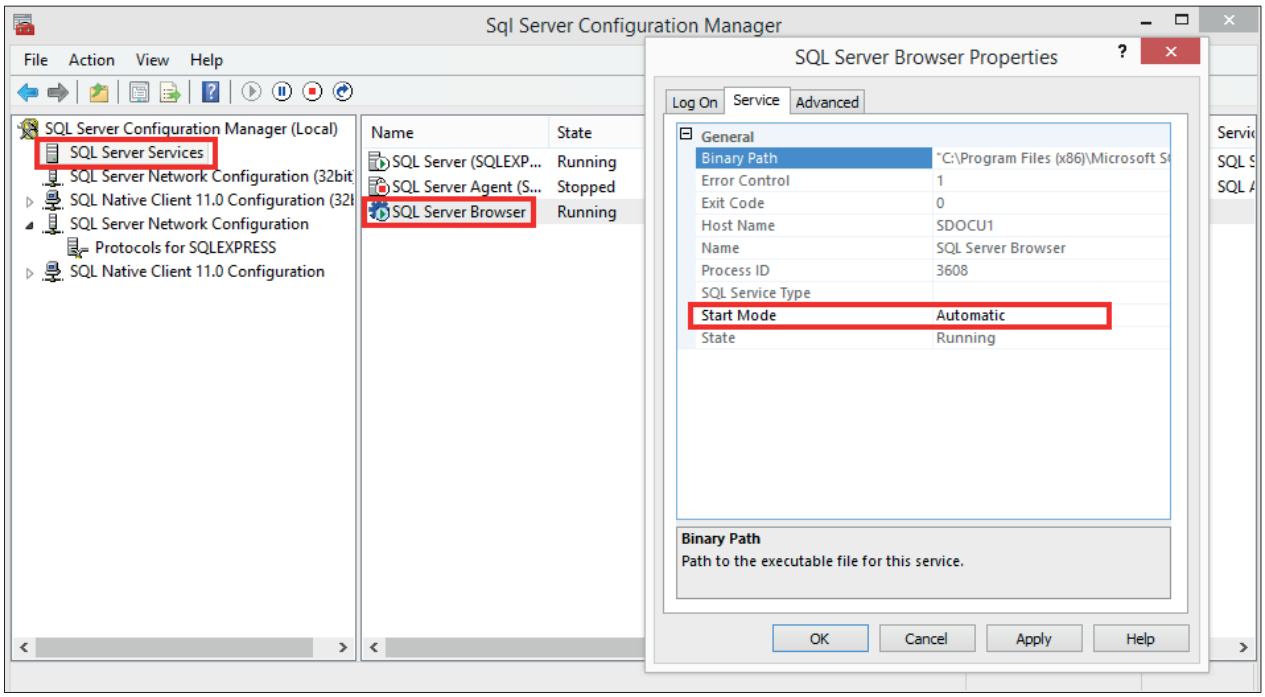

Fig. 3 – Starting the SQL Server Browser

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The Docusnap database itself will not be created from within SQL Server Management Studio, but automatically during the installation of Docusnap. For details, see the DATABASE section.

Please note that user rights can only be assigned after the database has been created by Docusnap.

Users who want to connect to the Docusnap database must have been assigned at least one of the following database role memberships:

- db_datareader
- db_datawriter
- db_dlladmin

As an alternative, you can assign the db_owner role to a user. This role includes the individual rights mentioned above.

Missing rights might cause problems when you try to perform Docusnap updates.

In the following example, an SQL user named *docusnap* is created in SQL Server Management Studio and the role memberships mentioned above for the Docusnap database are assigned to this user.

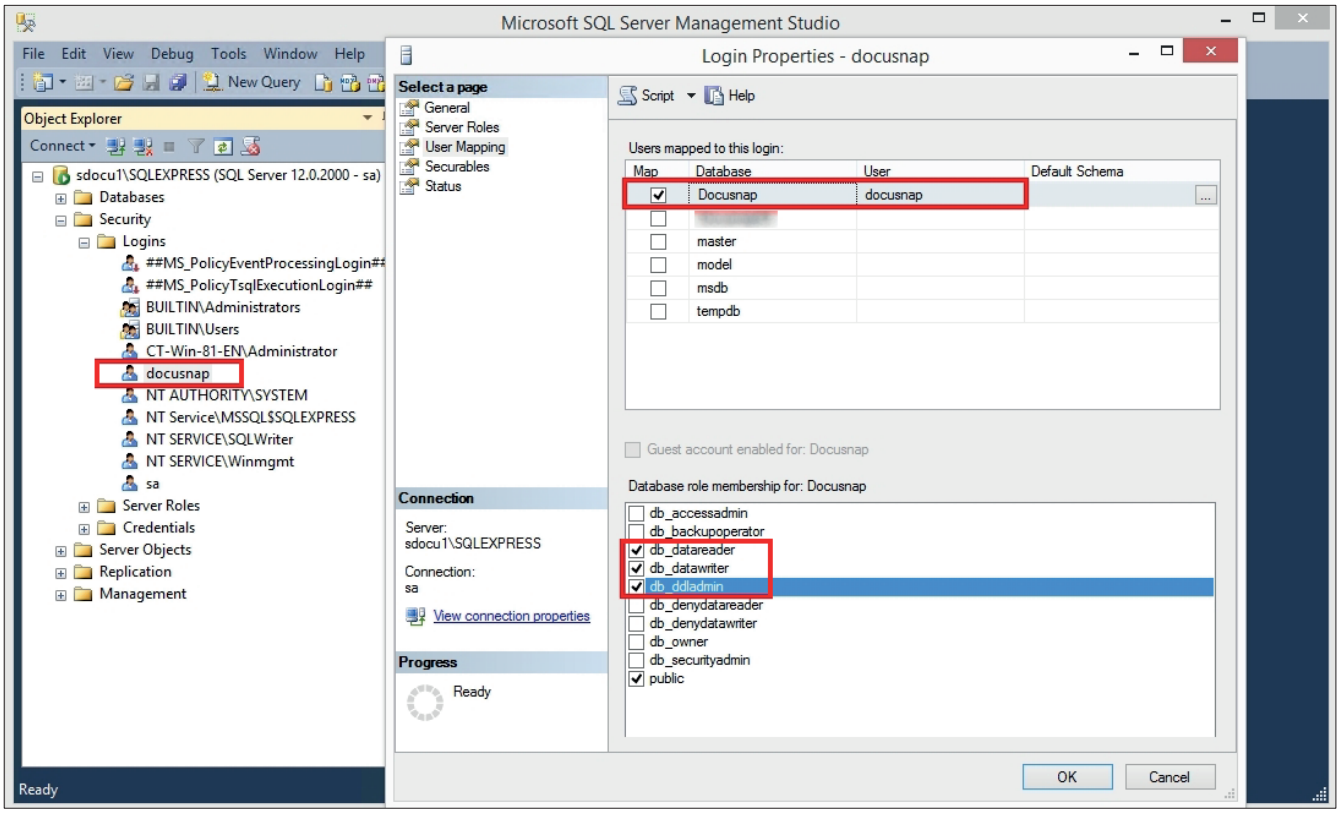

Fig. 4 – Database roles

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Please note that you can only use the SQL Server authentication if the "SQL Server and Windows Authentication mode" option (mixed authentication) has been selected.

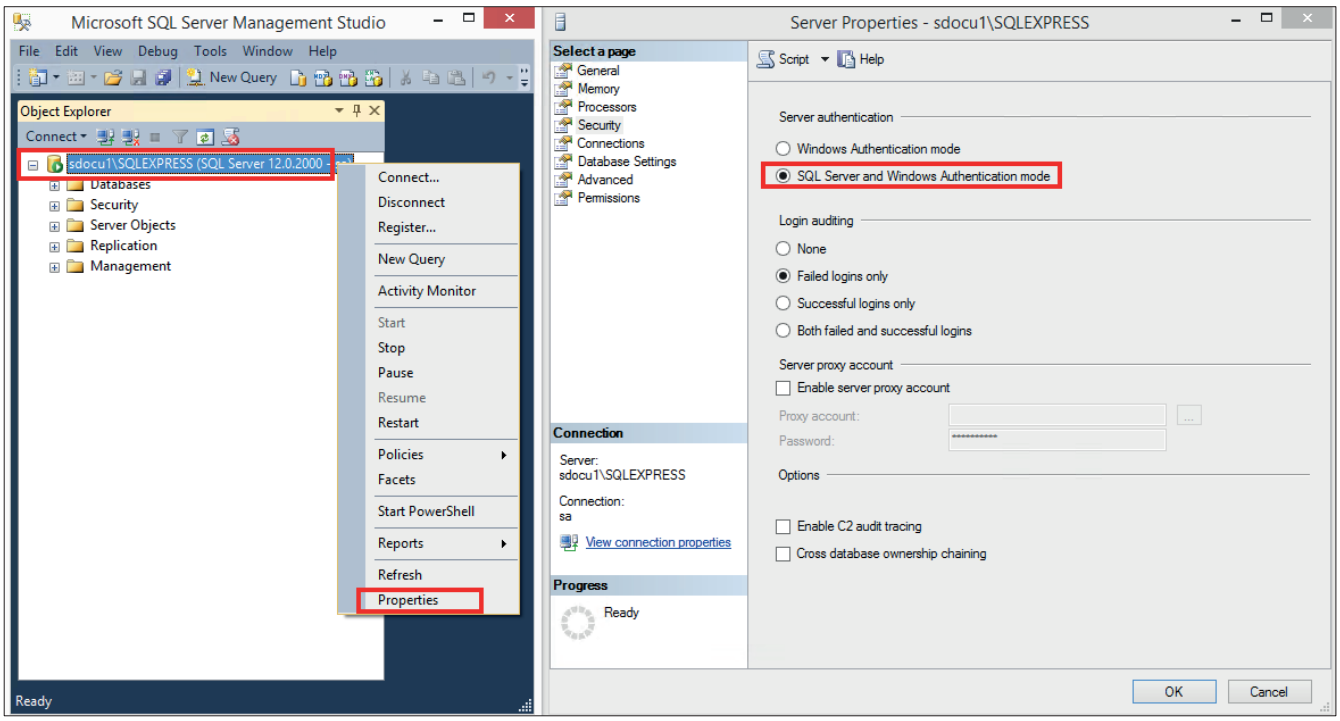

Fig. 5 – Server authentication

If you use the only Windows authentication mode, access permissions must be granted in SQL Server Management Studio to all users or groups that need to access the database. This also applies in particular to the service account used for the Docusnap Server service.

In case of doubts, please contact your database administrator.

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3.3 SQL SERVER LOCALDB 2014 VS. SQL SERVER (EXPRESS)

The following table outlines the differences between the two SQL Server variants with respect to the use of Docusnap.

	Save inventory data	Multi-user access (remote access)	Docusnap Server service (e.g. scheduled inventories)
SQL SERVER LOCALDB 2014	Yes	No	No
SQL SERVER (EXPRESS)	Yes	Yes	Yes

Table 1 – Comparison of SQL Server versions

In order to benefit from the full functionality of Docusnap, you need at least SQL Server (Express).

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4. CONFIGURING DOCUSNAP

The following section describes the first start of Docusnap and gives a detailed explanation of the most important settings.

When you start Docusnap for the first time, the Configuration wizard displays.

4.1 ACTIVATION

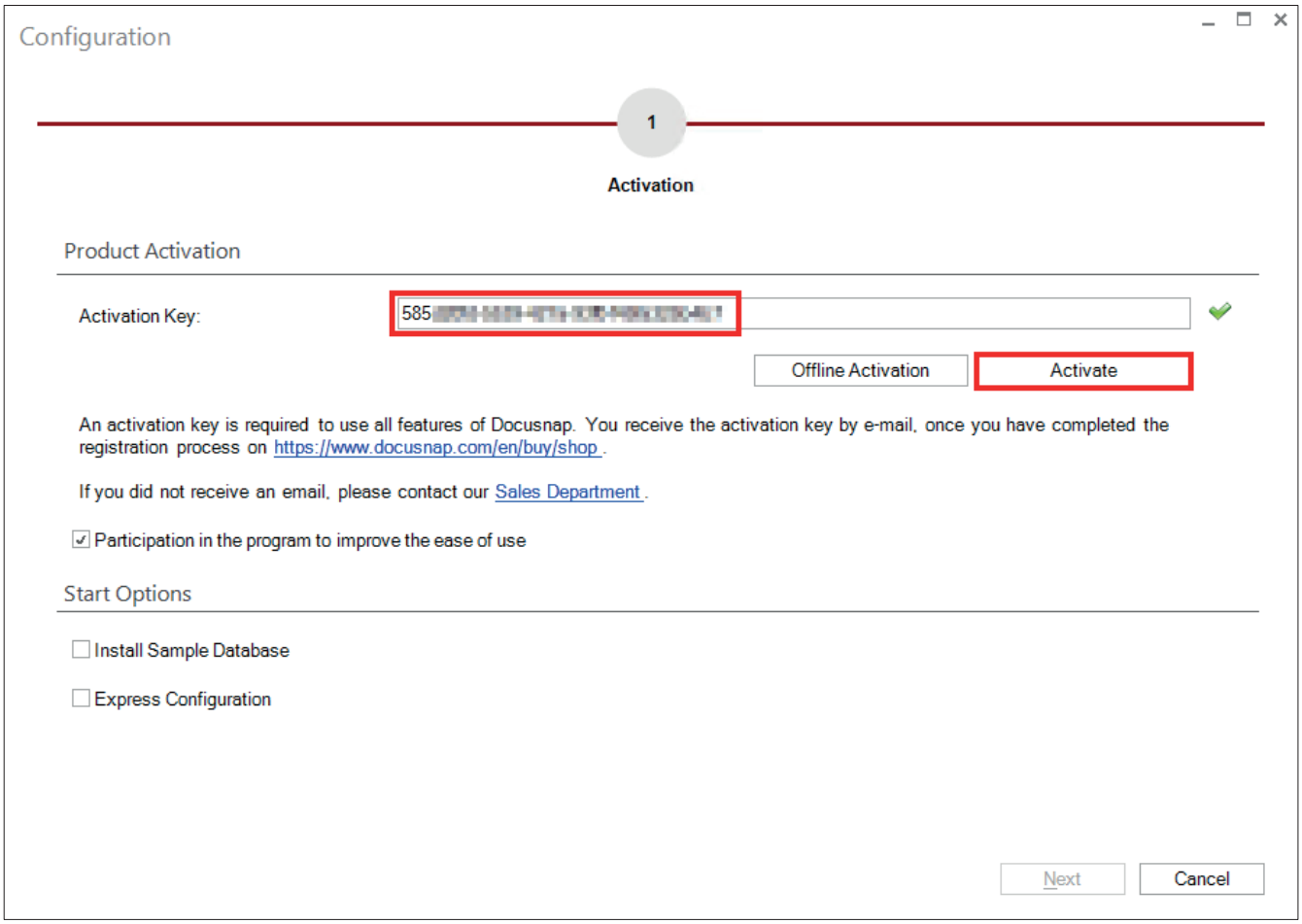

Fig. 6 – Entering the activation key and activating

You will receive the activation key from our Sales team by e-mail.

Click *Activate* to perform an online activation. If no Internet connection is available on your system, you can alternatively select *Offline Activation*.

Please note, however, that if the scope of your license changes, you will have to repeat the offline activation. In case of online activation, this is not necessary.

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4.2 DATABASE

In the next dialog, you need to create the database. In our example, a connection to the SQL server named *SDOCU1\SQLEXPRESS* is established. Select the "SQL Server Authentication" option, enter the user name *docusnap* and create a database named *Docusnap63*.

If you want to use SQL Server Express LocalDB (must have been installed previously), enable the *Use Local Database* checkbox and select "Windows Authentication".

Specify the name of the SQL server, a database name, and the password, click the "*Create*" button to create a new database.

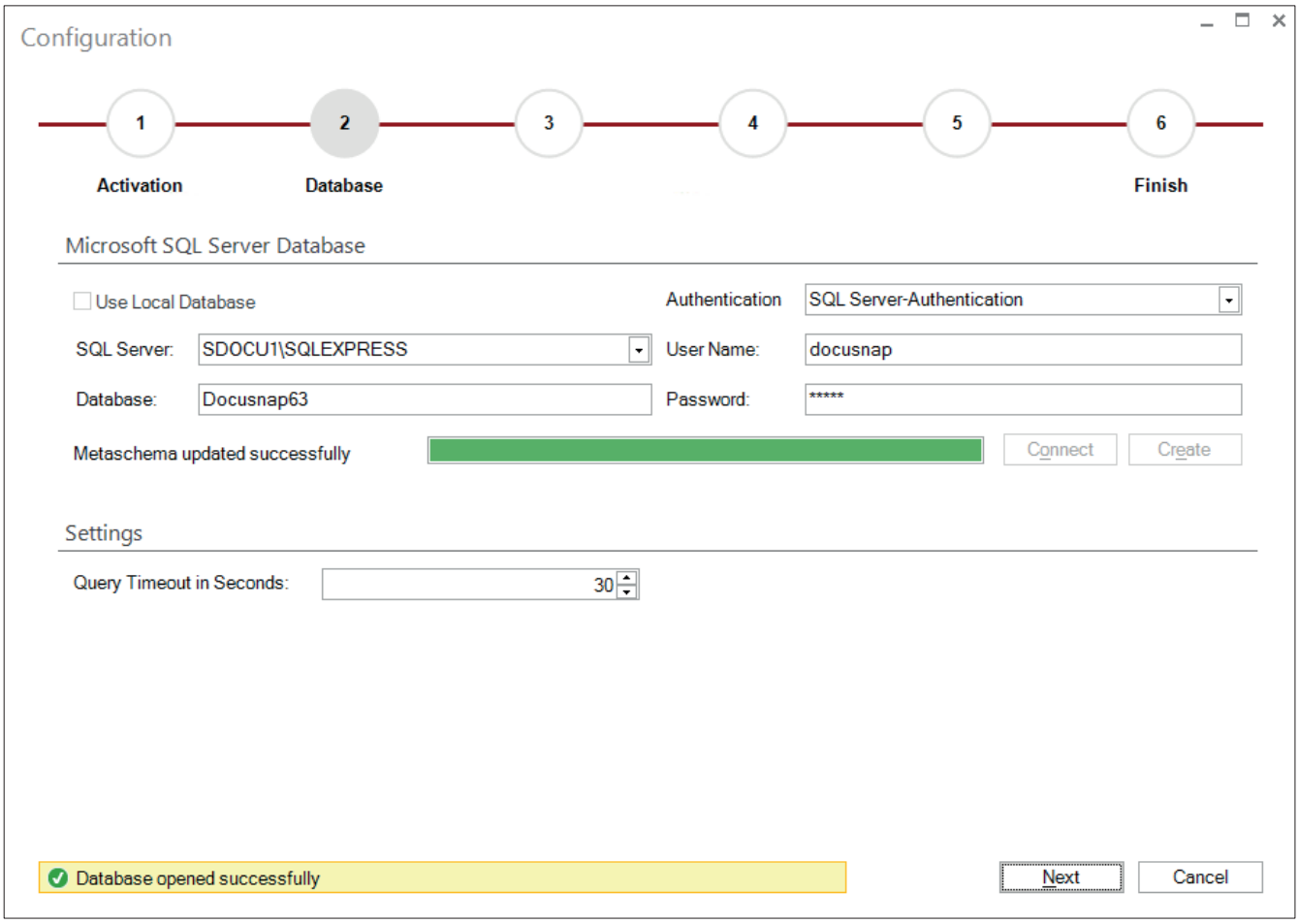

Fig. 7 – Database

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4.3 SETTINGS

In the next step, specify the paths to be used. We recommend to use a share so that all clients in a multi-user environment can work with the same contents (settings, documentation, concepts).

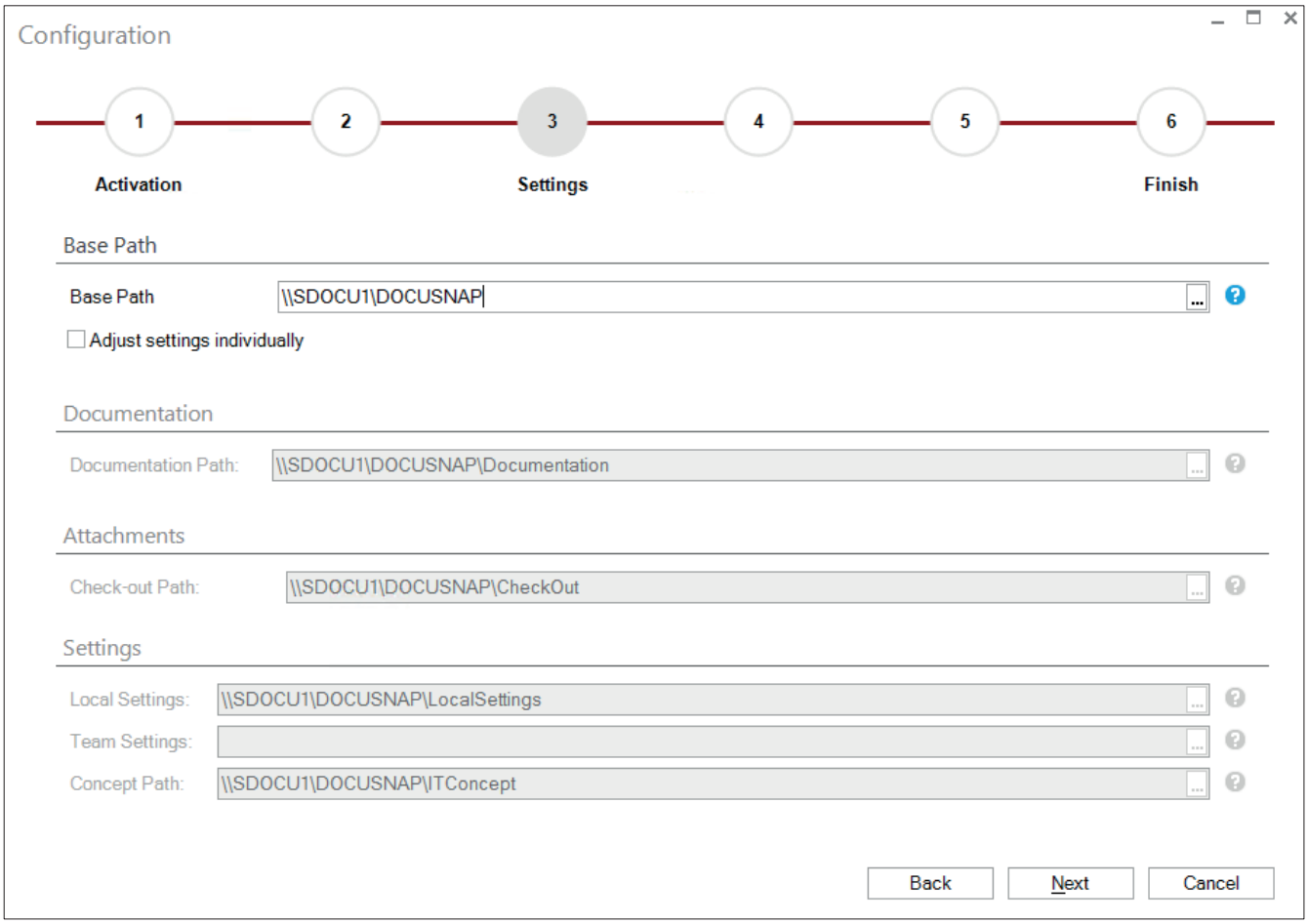

Fig. 8 – Settings

Path Descriptions

Documentation path:

This path contains all documents generated by Docusnap (maps, datasheets, overviews). If you specify a shared documentation path, multiple users can work with these documents.

Check-out path:

Extensions (such as comments, contracts, etc.) can be provided with attachments. To edit these attachments, you need to check them out. Attachments that have been checked out are stored in this path.

Paths for local settings / team settings:

Files for customized data entry forms (Customizing), concept templates, and report templates used for the generation of reports are stored in these paths.

Concept path:

In this path, concepts will be stored. This means that concepts are not accessible via the Docusnap database but through this file system path. Please think of this when setting up your backup strategy.

4.4 ENCRYPTION

In the next step, you can create an encryption file. If you want to use the Passwords extension, you need to create an encryption file.

For more details, please refer to the User Manual:
http://www.docusnap.com/handbuch/anwender/index.html?docusnap-organisation-erweiterungen.htm

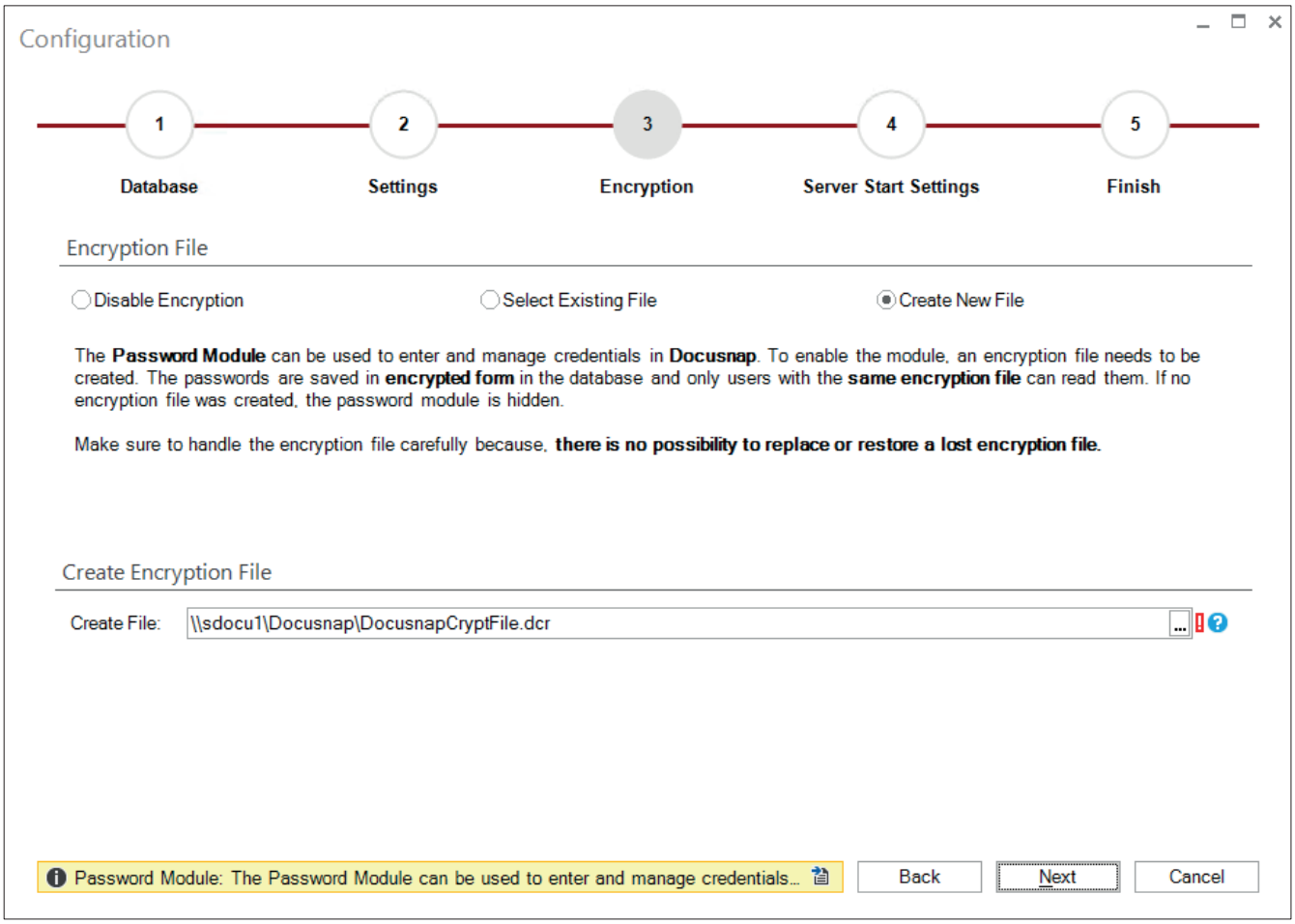

Fig. 9 – Creating an encryption file

Make sure to keep the encryption file in a safe place, since it is not possible to replace or re-create this file should it become lost.

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4.5 SERVER START SETTINGS

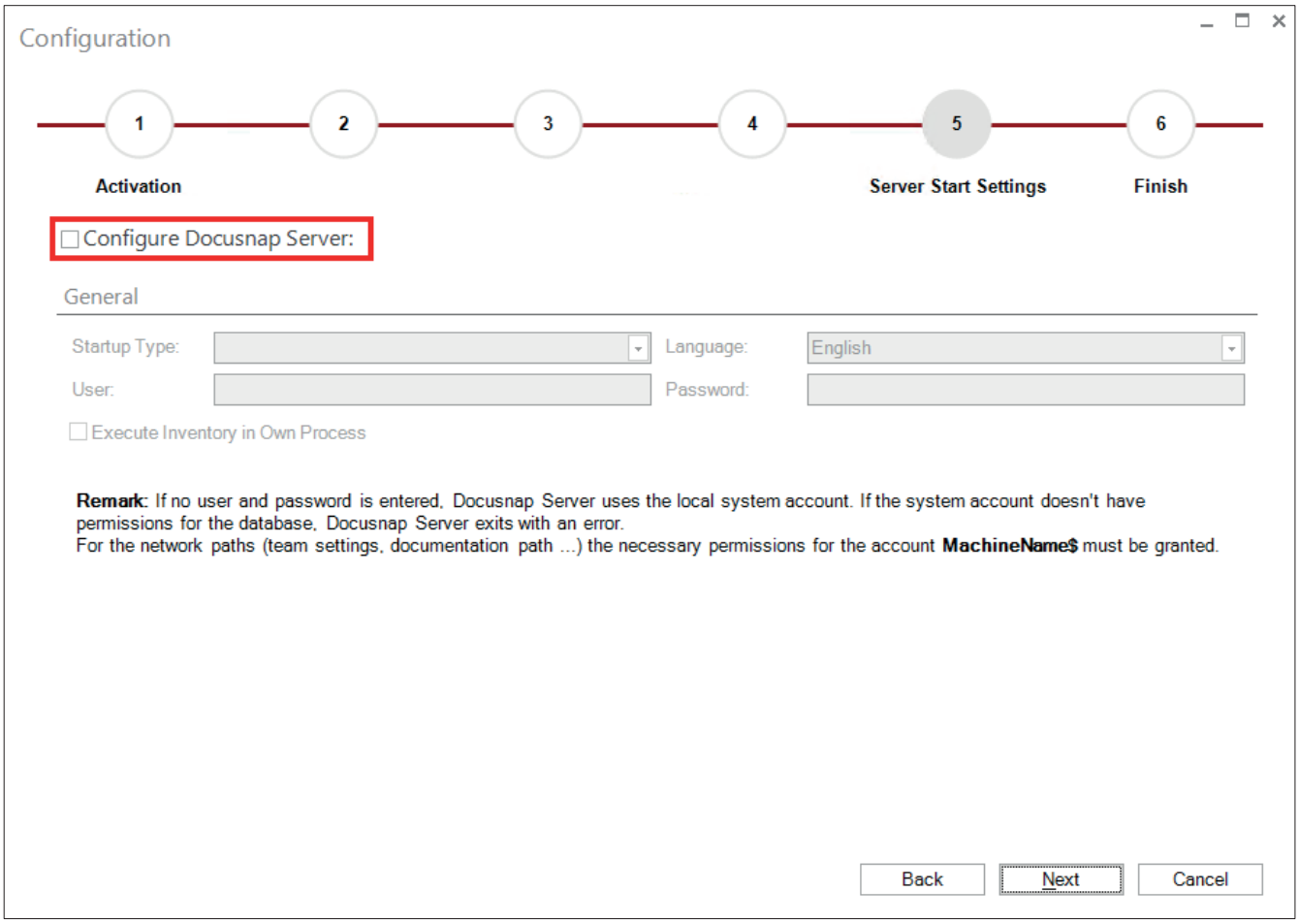

Fig. 10 – Server Start Settings

Now, you can configure the Docusnap Server service for scheduled inventory scans and document creation. In order to get started quickly, disable the *Configure Docusnap Server* checkbox now and click *Next*.

The configuration will be explained later in the CONFIGURING DOCUSNAP SERVER section.

4.6 COMPLETION

When you click *Finish*, Docusnap will be started.

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5. PERFORMING INVENTORY SCANS

5.1 INITIAL SCAN

When you start Docusnap for the first time, the initial scan will be performed.

For this purpose, you must specify the company, domain, and credentials in the wizard, unless these fields have already been populated with the correct data.

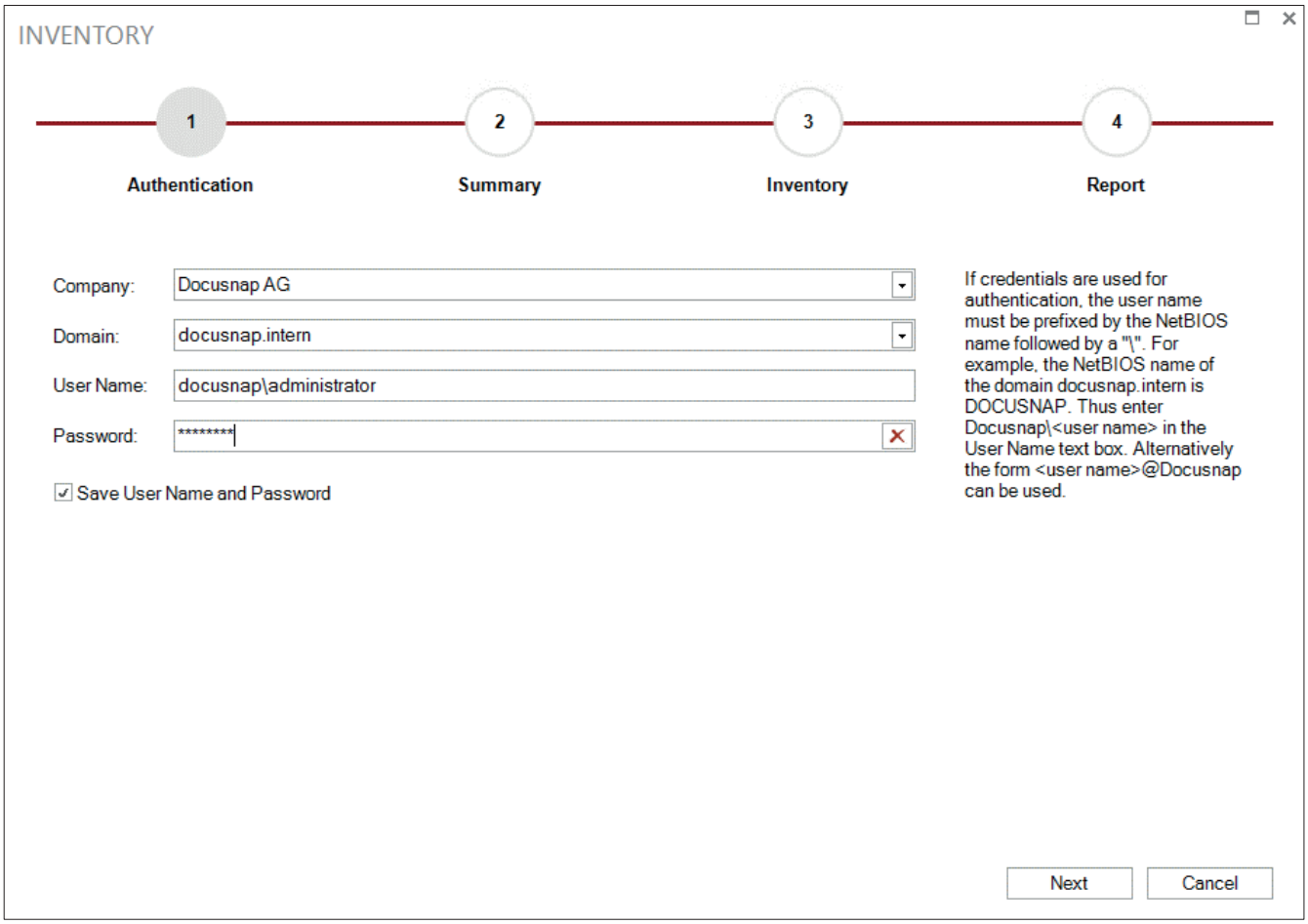

Fig. 11 – Authentication

> Important
> When entering the domain name, always use the FQDN format (Fully Qualified Domain Name).

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Now, Docusnap automatically determines the systems existing in the network.

In the wizard, you can exclude systems from the scan by removing the corresponding checkmarks. If some systems are missing, you can scan them later individually.

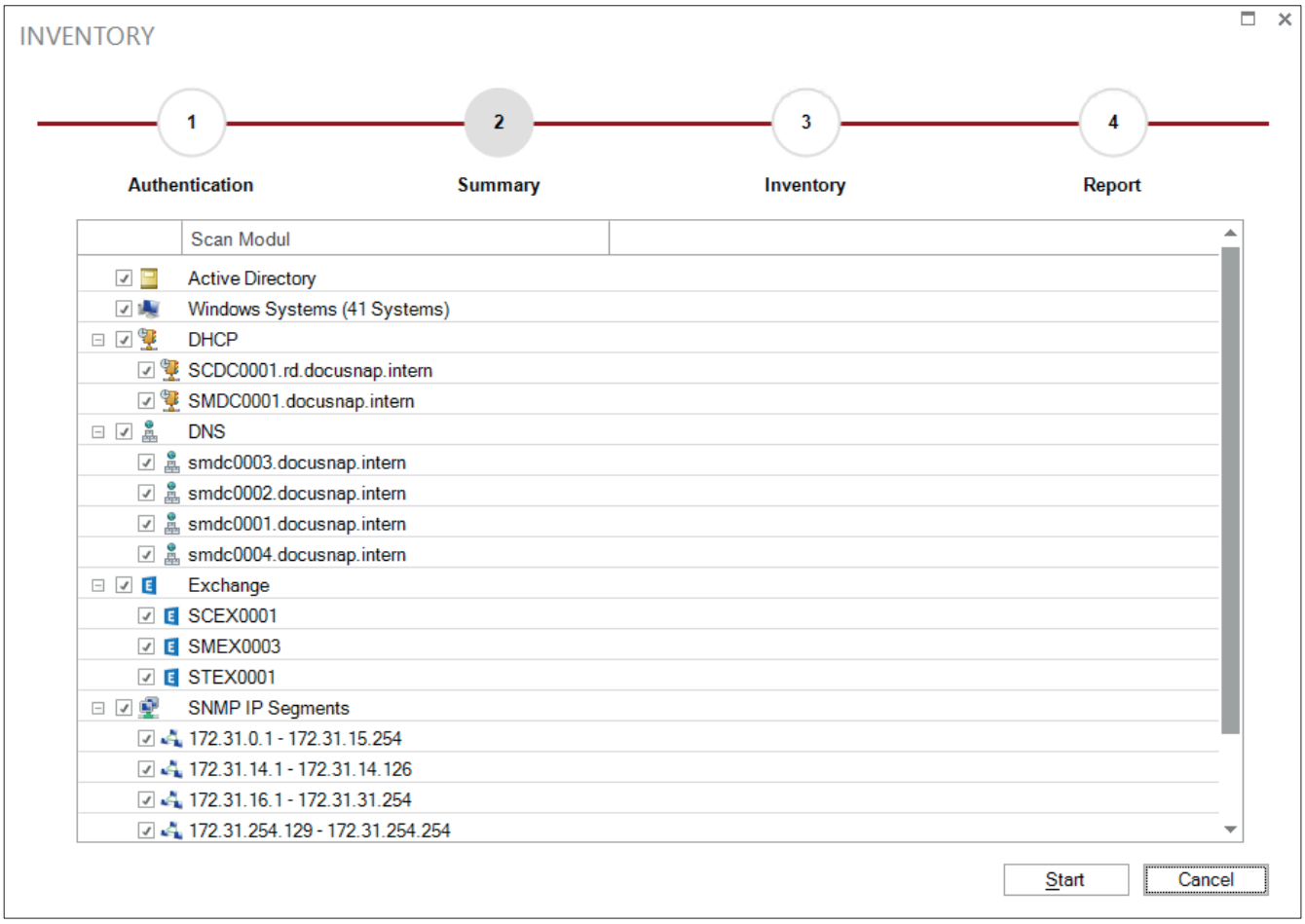

Fig. 12 – Selecting the items to be scanned

Please note that the initial scan may take some time, depending on the network size and complexity.

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Docusnap displays the progress of the scan.

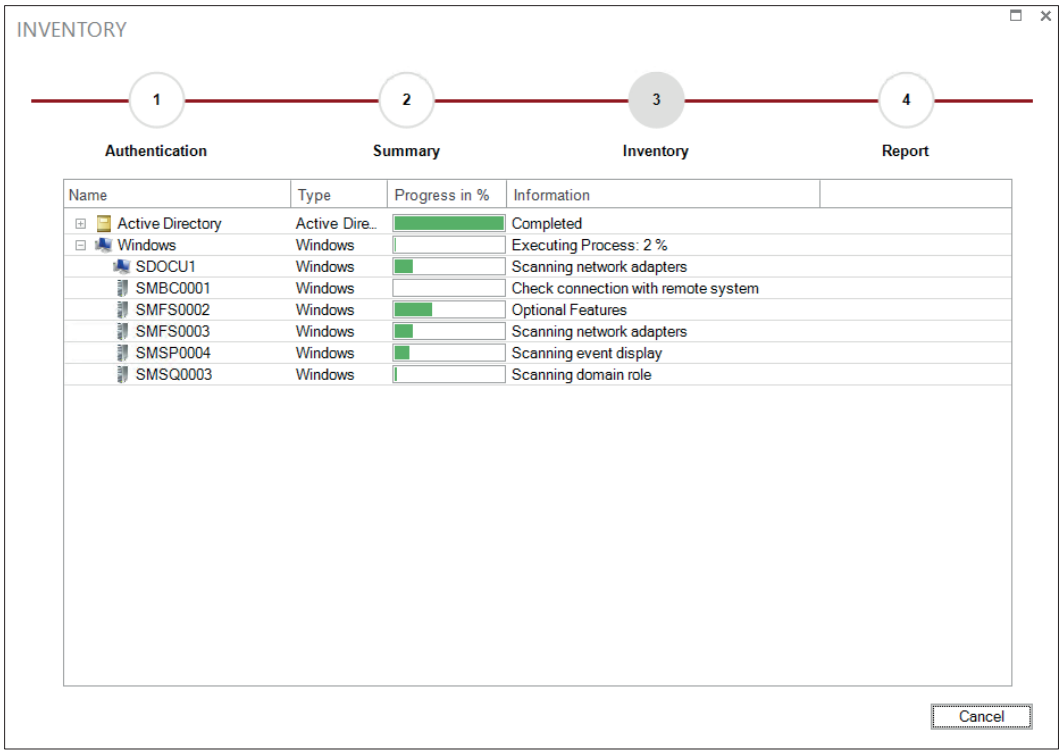

Fig. 13 – Scan progress

Once the scan is completed, data of the inventoried devices is available in the database.

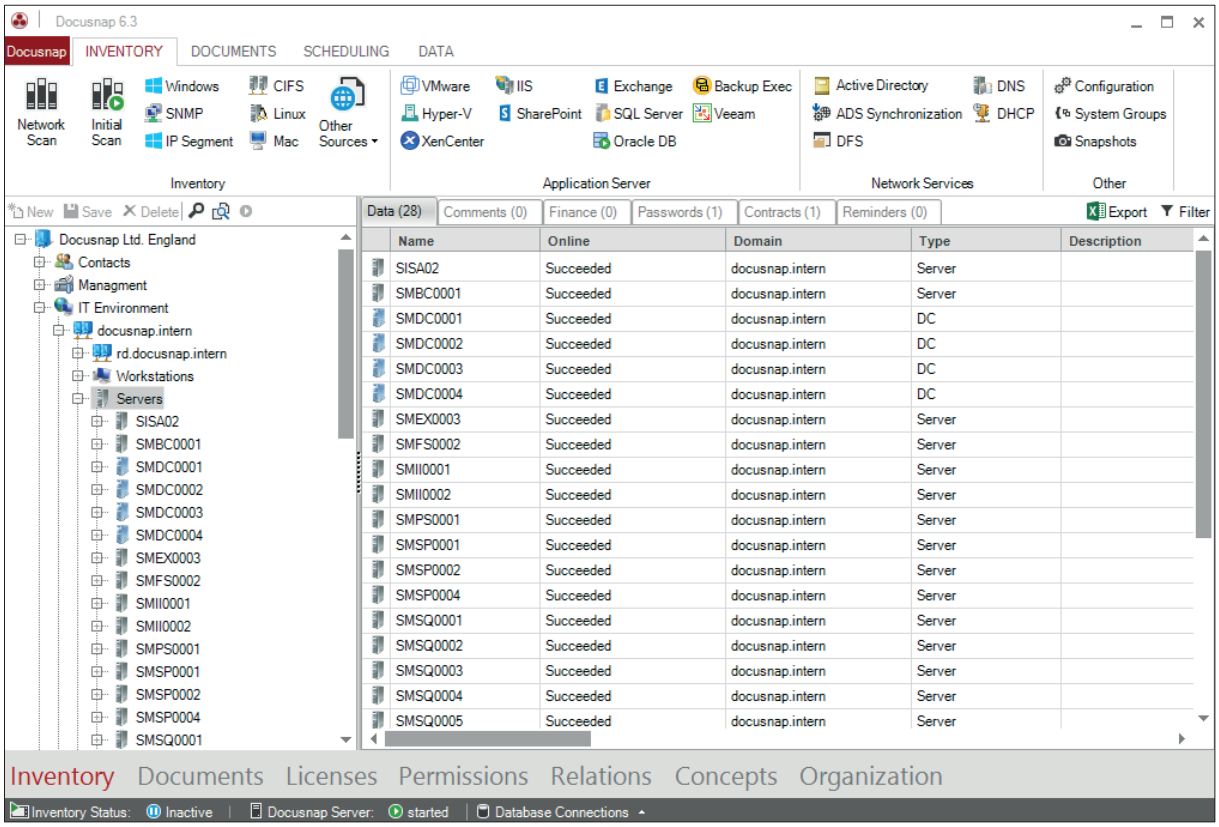

Fig. 14 – Results

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5.2 PROBLEMS AND ERROR MESSAGES

5.2.1 DNS / PING

Docusnap can only inventory Windows systems via WMI if these respond to a ping command.

In addition, the DNS must be able to resolve the system name properly. In this context, you should check whether the translation of IP addresses into names (reverse lookup) has been configured correctly in the name resolution system. For this purpose, you can use the *nslookup* command line tool.

5.2.2 WINDOWS FIREWALL

If the Windows firewall is enabled on a system to be scanned, you might need to define corresponding firewall exceptions so that Docusnap can connect to the system.

For a detailed description of how to define these firewall exceptions, please refer to the "Configuring Windows Firewall Exceptions for Docusnap" How To document at:
http://www.docusnap.com/support/how-to

5.2.3 WMI

If you experience WMI connectivity problems, please refer to the separate document on WMI troubleshooting.

It is available in the Support section of our website at:
http://www.docusnap.com/en/support/how-to

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6. CONFIGURING DOCUSNAP SERVER

6.1 OPENING THE CONFIGURATION WIZARD

To configure the Docusnap Server service, click the *Scheduling* tab.

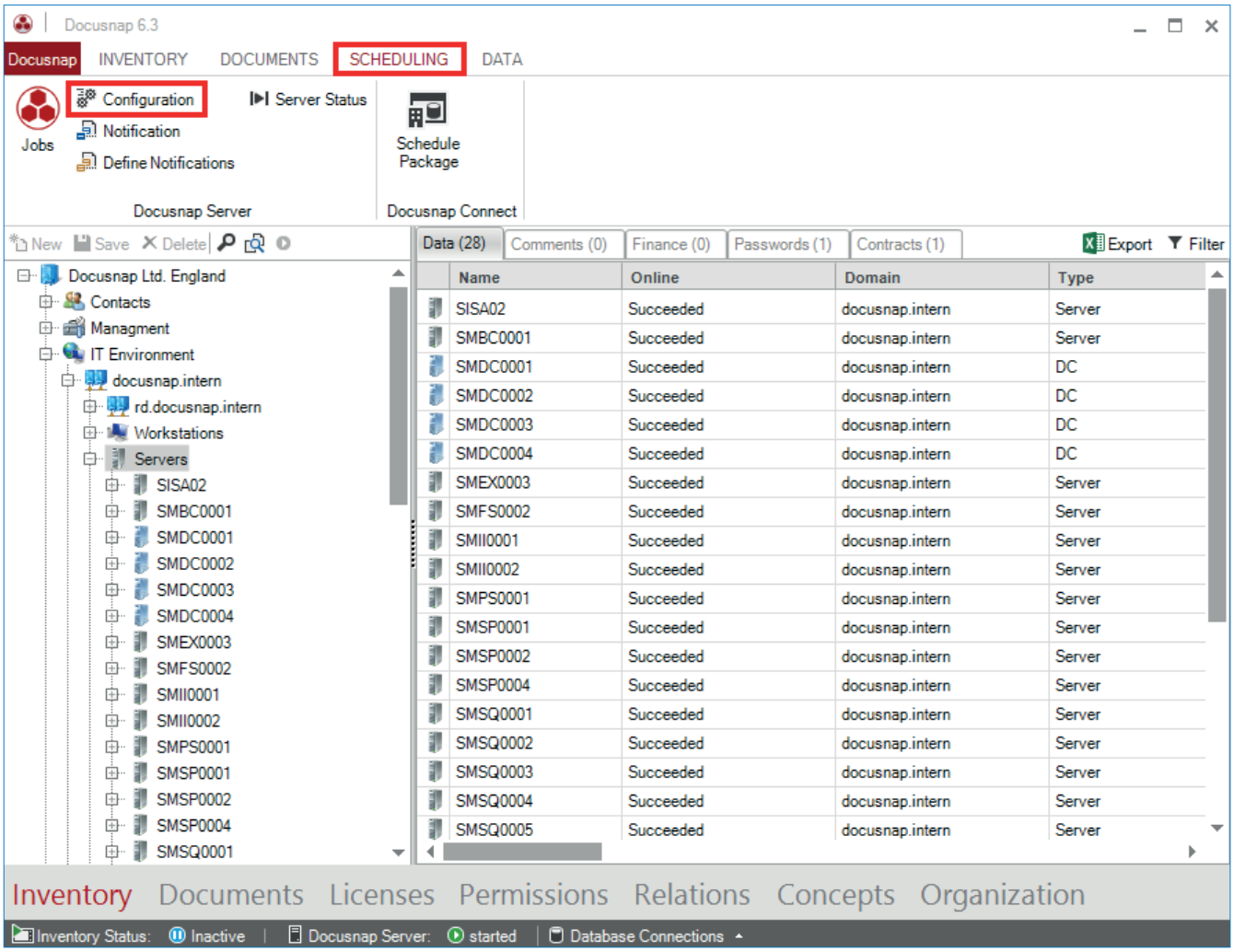

Fig. 15 – Opening the Docusnap Server configuration wizard

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6.2 SERVER START SETTINGS

Please note that the Docusnap Server service can only be configured and started once for a single database. If you try to configure the service on a second system, the settings configured on the first system will be retained and the server will be run from the first system.

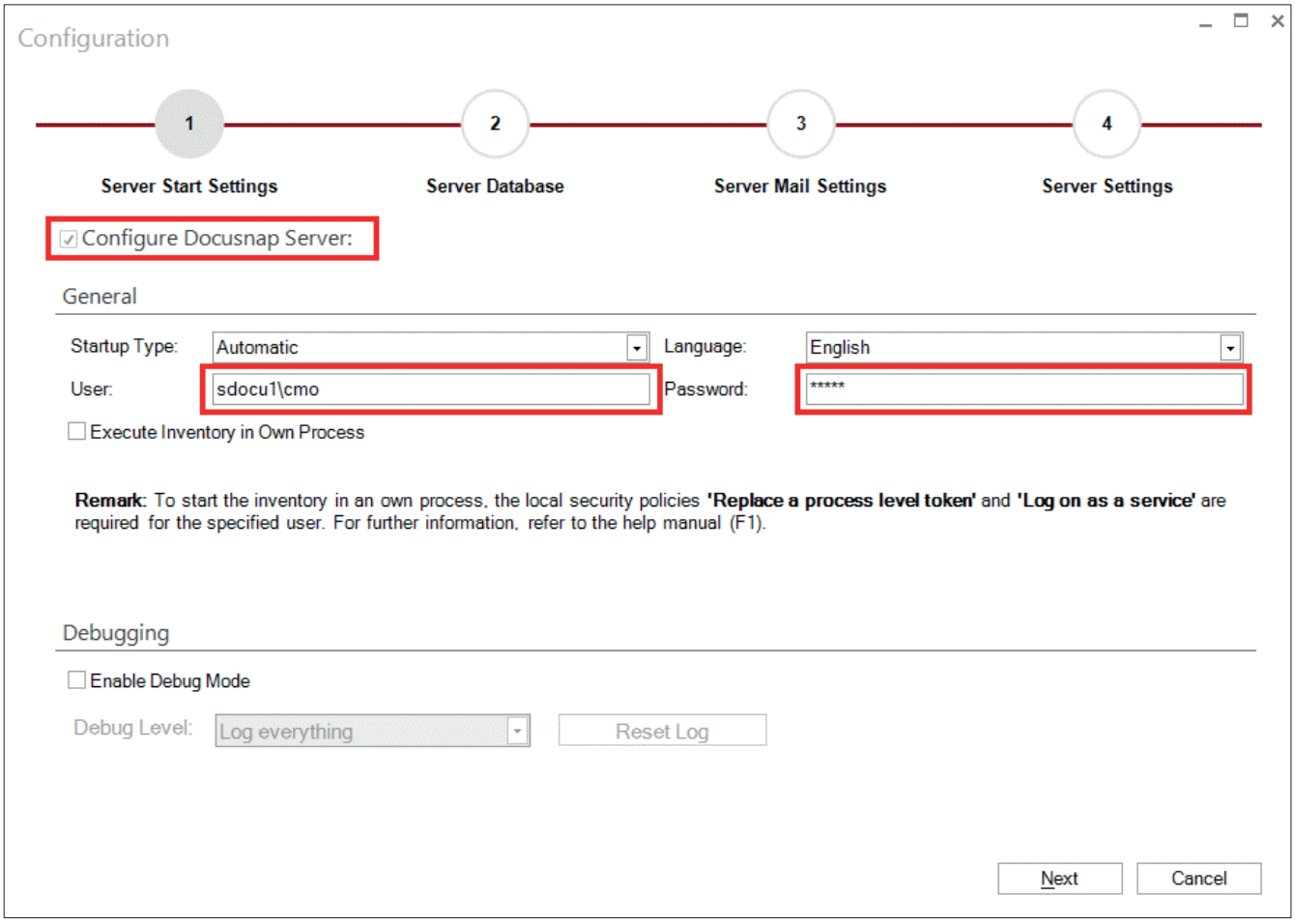

Fig. 16 – Server configuration

We recommend that you start the Docusnap Server service using a user account with sufficient permissions, e.g. as a domain administrator. If you do not enter a user name, the service will be started using the local system account. Of course, the user under whom the service is run must be granted the required permissions. To do so, start service management (services.msc), select the *Docusnap 6 Server* service, and open its properties.

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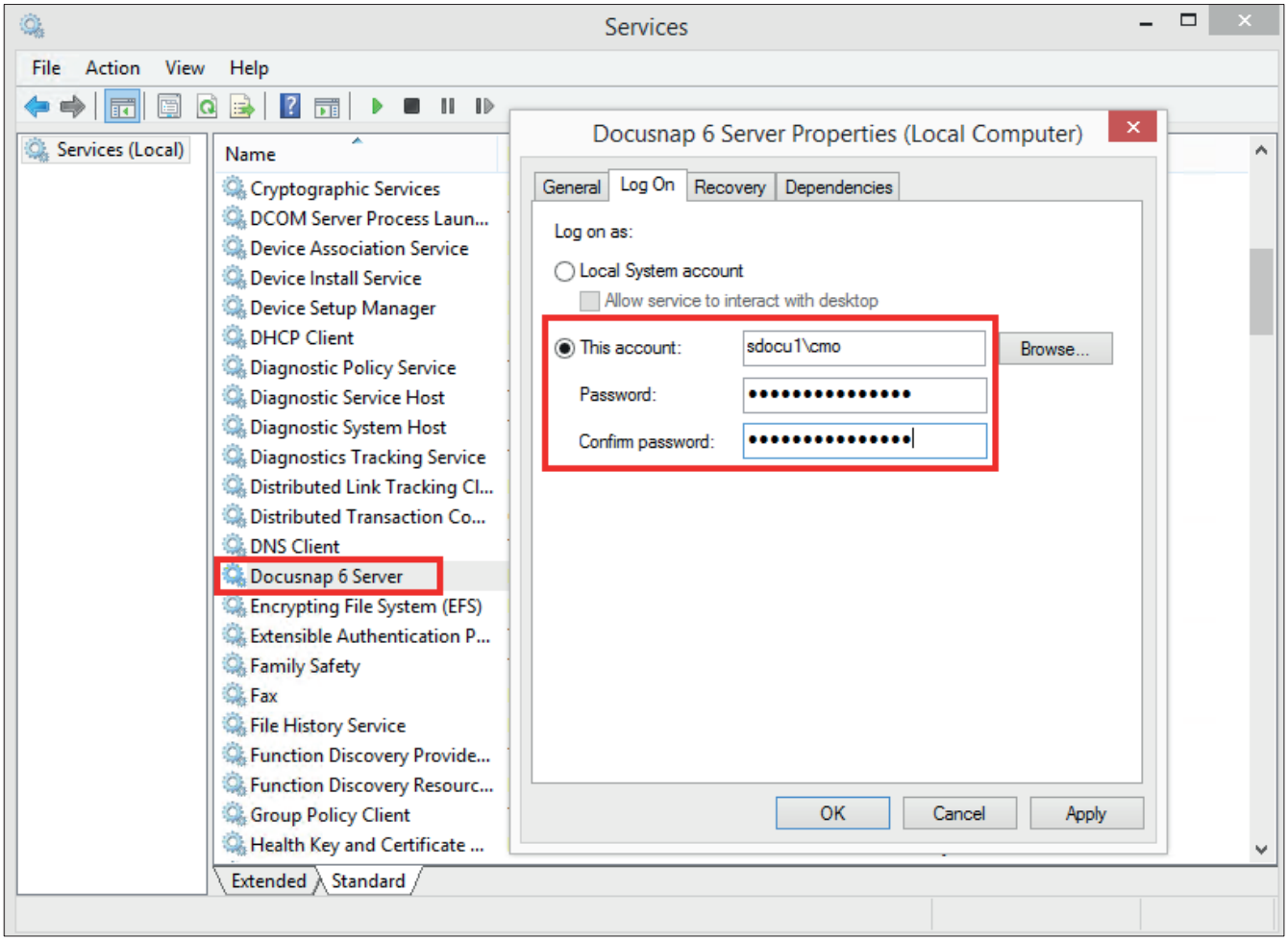

Fig. 17 – Docusnap 6 Server service

On the Log On tab, click *This account* and enter the appropriate user name and password. Then, confirm with *Apply*. The confirmation message "The account %domain%\%username% has been granted the Log On As A Service right" displays.

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6.3 SERVER DATABASE

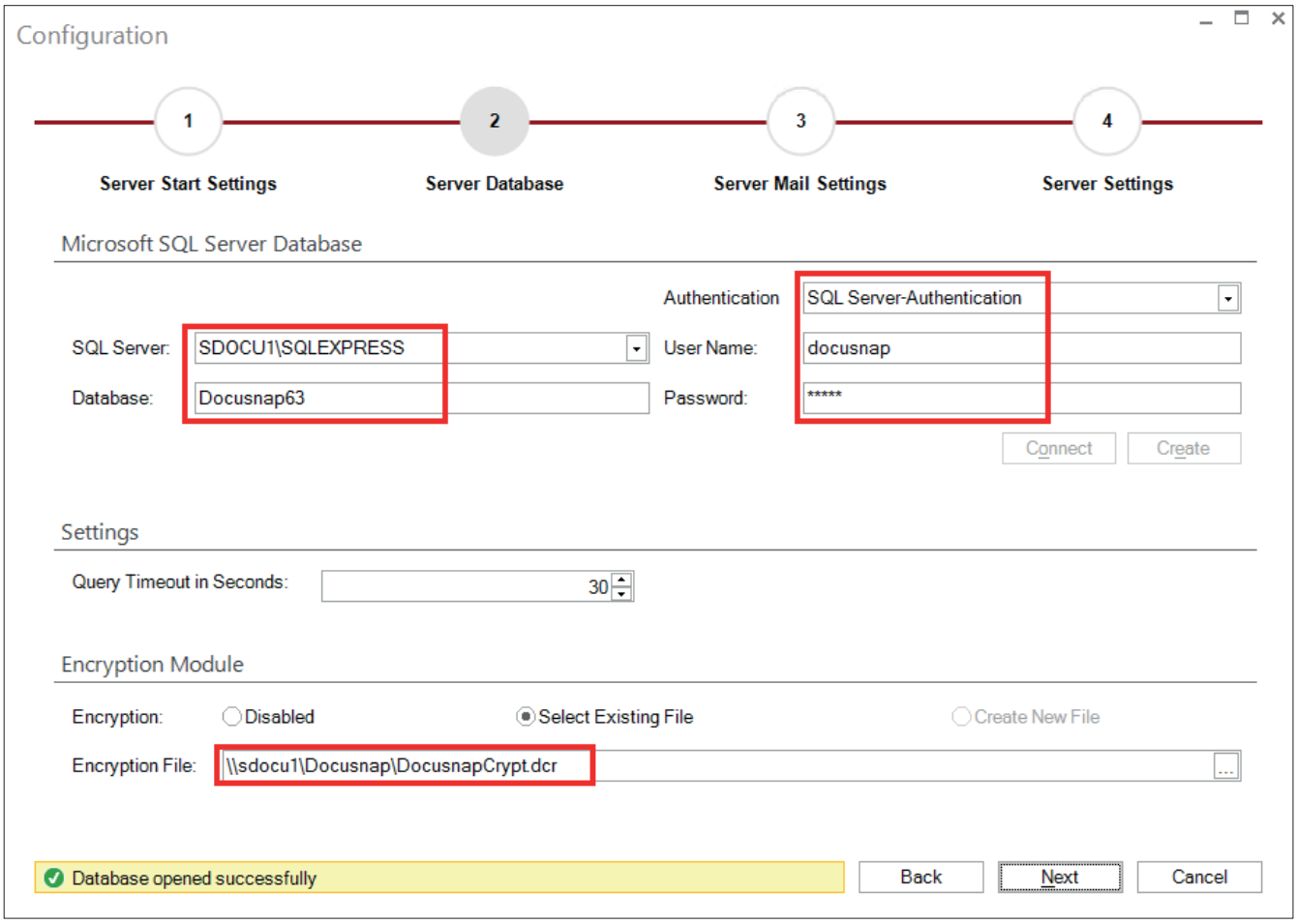

Fig. 18 – Database settings for the Docusnap Server service

You can configure the database settings for the Docusnap Server service independently from the normal Docusnap database settings. The wizard will populate most fields with the settings you defined previously. In most cases, no changes will be necessary.

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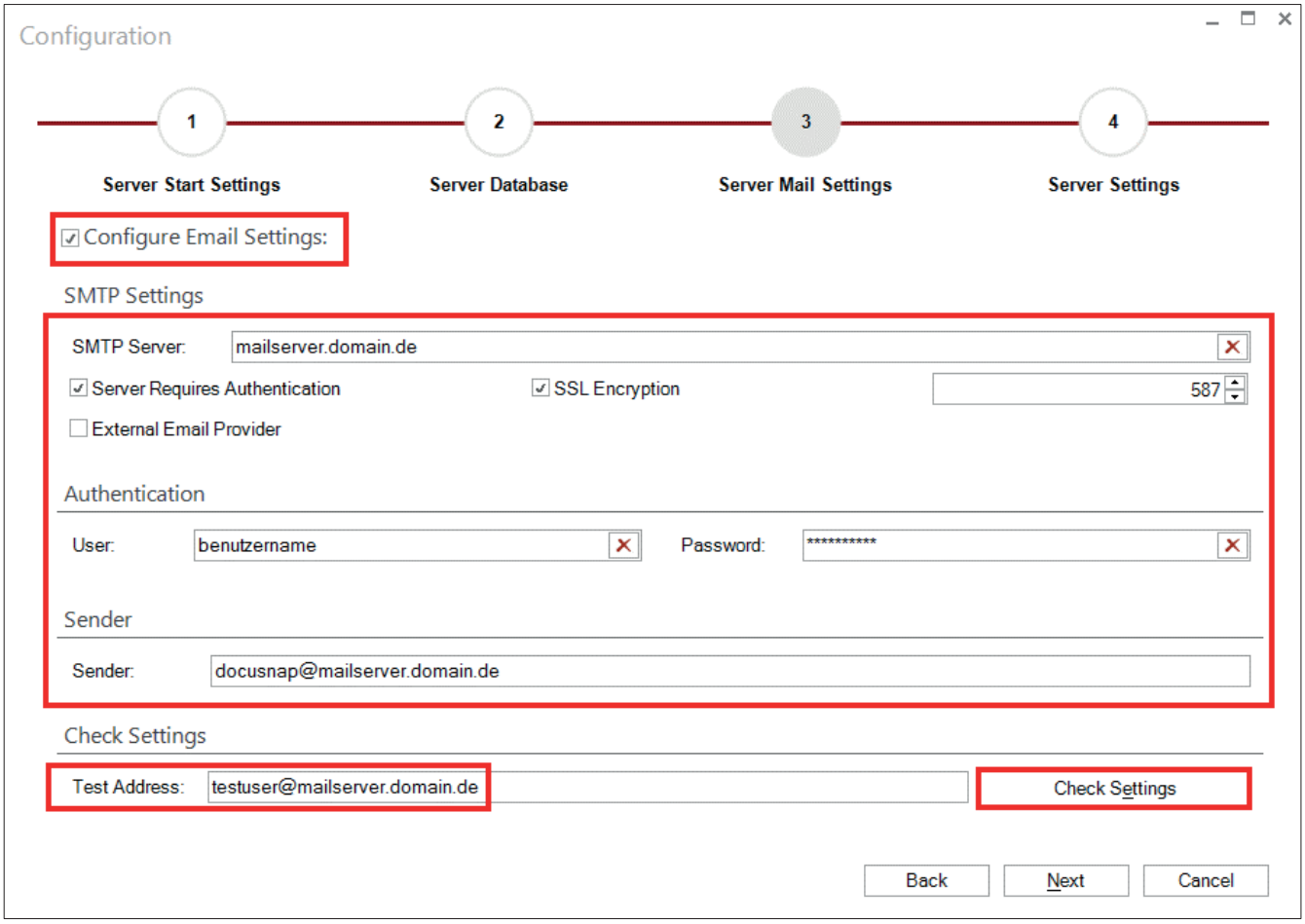

Fig. 19 – Configuring the e-mail settings

If you want the Docusnap Server service to notify you of certain events by e-mail, you need to configure e-mail settings. Enter the required SMTP settings and test them by sending a test e-mail. You can only continue with the Configuration wizard if the test was successful.

If e-mail relaying is enabled internally, the e-mails can be sent without requiring authentication.

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6.4 SERVER SETTINGS

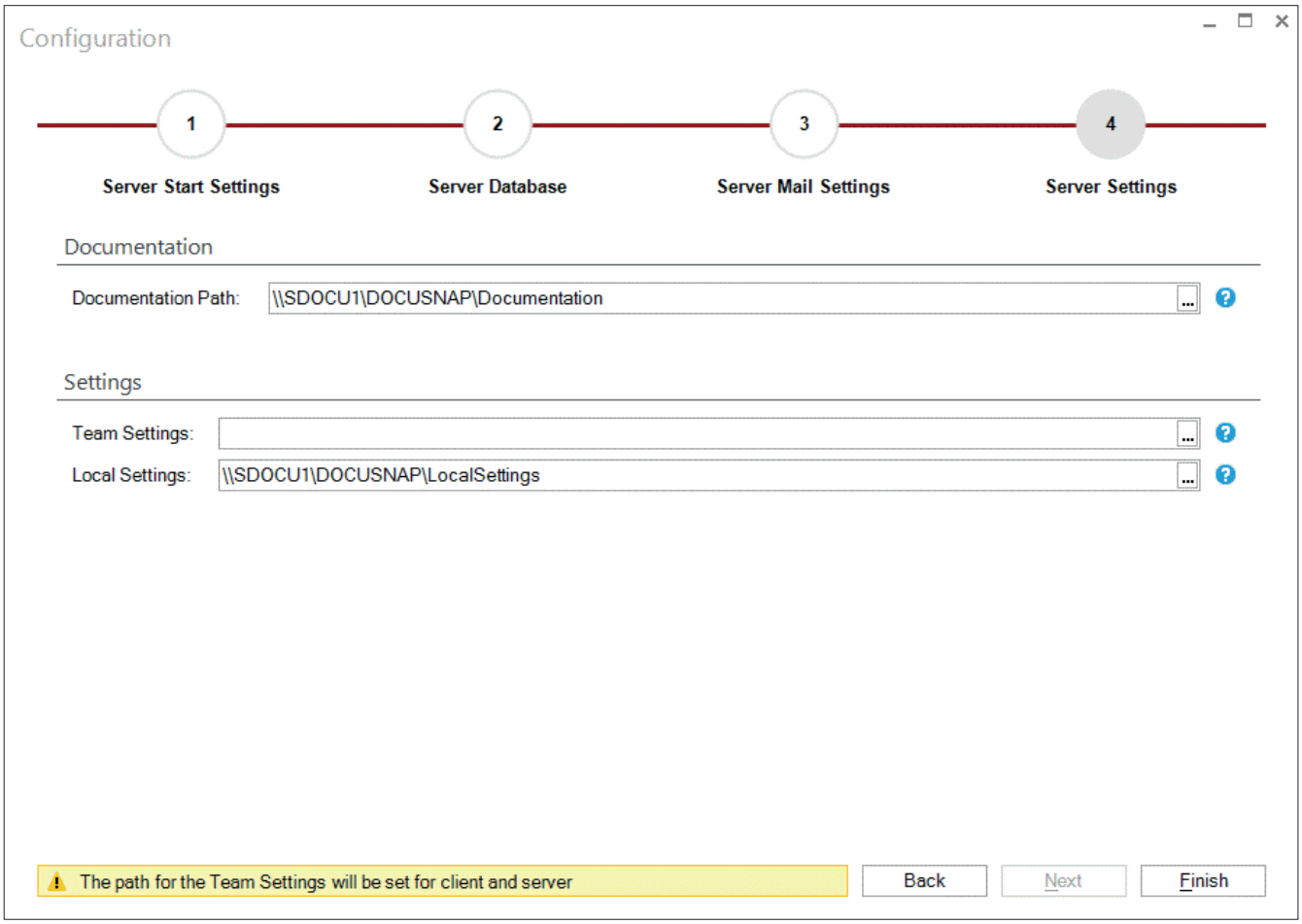

Fig. 20 – Paths for the Docusnap Server service

Some paths can be configured separately for the Docusnap Server service. The wizard will populate the fields with the settings you defined previously. In most cases, no changes will be necessary.

When you click *Finish*, the Docusnap Server service will be started with the recently defined settings.

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