

# **Docusnap<sup>®</sup>**

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## **IT Concept HowTo**

This HowTo was completely implemented as an IT-Concept in Docusnap

|                |                     |
|----------------|---------------------|
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## 1. INTRODUCTION

Documentation of the IT landscape is created for various reasons - e.g. due to audits, certifications or emergency planning. One of the requirements of IT documentation is that it must be consistent, dynamic, up-to-date and reusable.

The classic documentation, without an available database, as provided by Docusnap, does not meet these requirements at all or only to a limited extent.

Classical documentation stirs up resistance to the creation of documentation. These resistances can result from IT staff not having time, being overloaded or having other priorities. In most cases, it is the time it takes to create documentation.

This is exactly where Docusnap and the IT concepts come into play. Docusnap provides information about systems, services and applications via automatic inventories. Within the IT concepts, you can now make this information usable so that it can be brought into context and understood.

In addition, the great advantage of the IT concepts is that the data there is dynamic and therefore up-to-date, based on the inventories.

This HowTo describes the steps and functions necessary to successfully create an IT concept. These includes:

- the basics and understanding of IT concepts - [Chapter 2](#)
- the basic text editor functionalities - [Chapter 3](#)
- inserting content - [Chapter 4](#)
- the output of the finished IT concepts - e.g. in a PDF - [Chapter 5](#)
- managing concepts - e.g. versioning and automatic exports - [Chapter 6](#)
- the creation of concept templates that can be reused across customers - [Chapter 7](#)

## 2. IT CONCEPTS

Within the IT department, documentation on various areas must be prepared on a regular basis. Docusnap collects information about systems, applications, services and permissions through the integrated inventory wizards. In addition to this automated collection, information can also be added manually - e.g. assets, additional information or diagrams.

This information can be viewed individually within the data areas, plans and reports.

The concepts in Docusnap offer you the possibility to create a structured complete documentation. Content of this complete documentation can be all information sources from Docusnap itself (reports, plans, data areas etc.), external documents and static content (prose texts, tables, images etc.).

The IT concepts in Docusnap can be found in the **Documentation - Concepts** module.

The selection of the tree object **Concepts** shows the tab **Concepts** with specific controls.

You can generate the first concept by right-clicking on **Concepts** and then selecting **Create concept**.

The dialog for creating a concept will open. Here you can select a **concept name** and an **existing template** or **empty document**.

After the selection and naming has been completed, the **concept editor** is opened.

### Ribbon bar

- Settings for formatting, content, view etc.

### Objects

- Within the objects, all explorers from the different modules are displayed.
- Reports, data elements, etc. can be dragged and dropped into the concept using these.

### Document layout

- The structure of the document is displayed here.

### Document

- In this area, the document is created and the added content is displayed.

### Variables

- Variables for date, page number, title, creation date, etc.

### Tasks

- Placeholders stored in the concept are described here one after the other and can be edited by selecting the button.

### Error list

- Inside the Ribbon - **Document** - you will find the **Validate** button.
- The concept is then checked and the error list (e.g. deleted diagrams) is displayed.

### 3. STRUCTURE

The concept editor in Docusnap provides you with the most common structural elements that you can use to create a structured document.

Within the Ribbon - **Page Layout**, you can set page size, orientation, margins, wraps, etc.

The **Insert** tab lists controls that you can use to insert the various contents, static and dynamic, into the concept. With regard to the construction of a structure, the table of contents and the header and footer should be mentioned in particular. The other contents are described separately in [Chapter 4](#).

On the **General** tab, you can save and export the concept, perform formatting, apply style sheets, and set up paragraphs.

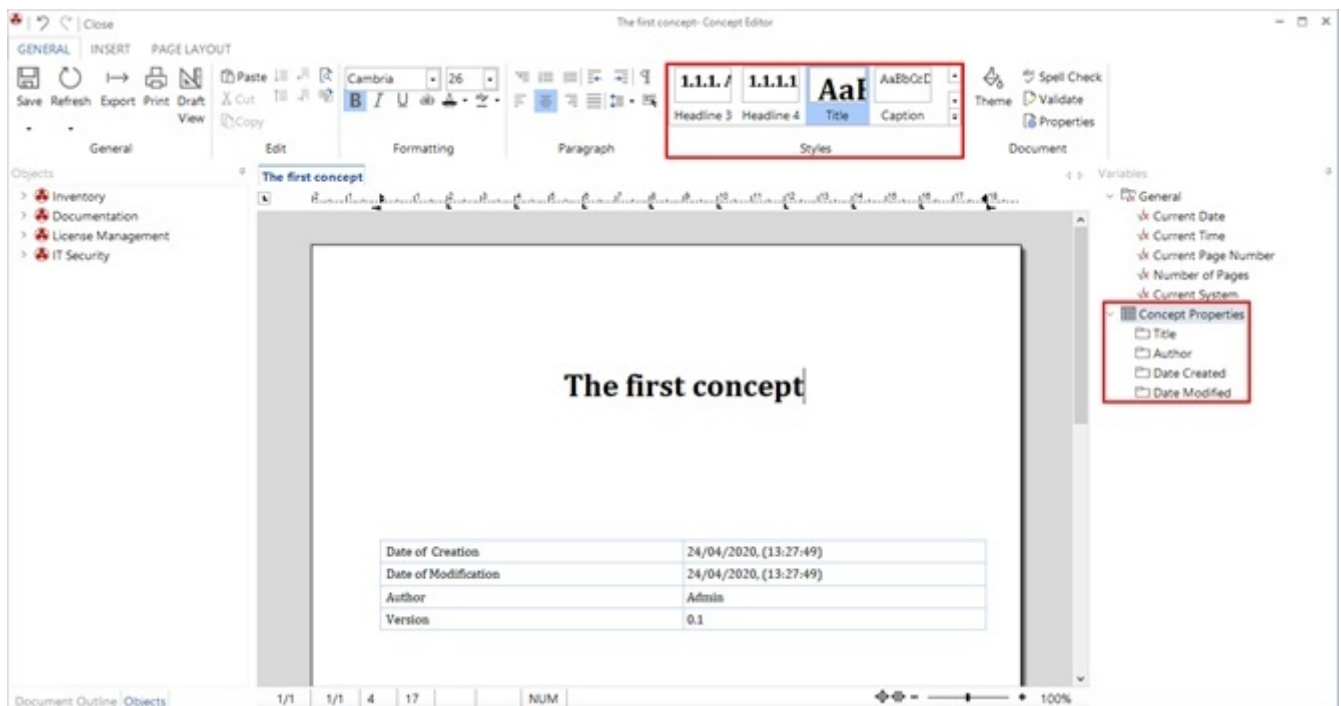
Please note that the concept editor is not a full Word replacement. The concept editor is a separate text editor that does not have the functionality of Microsoft Word.

### 3.1. STRUCTURING THE CONCEPT

We start by building the structure:

- cover page
- table of contents
- header and footer

For the cover page, you need the *Style* **Title** and the *Variables* **Title**, **Date Created** and **Date Modified**.

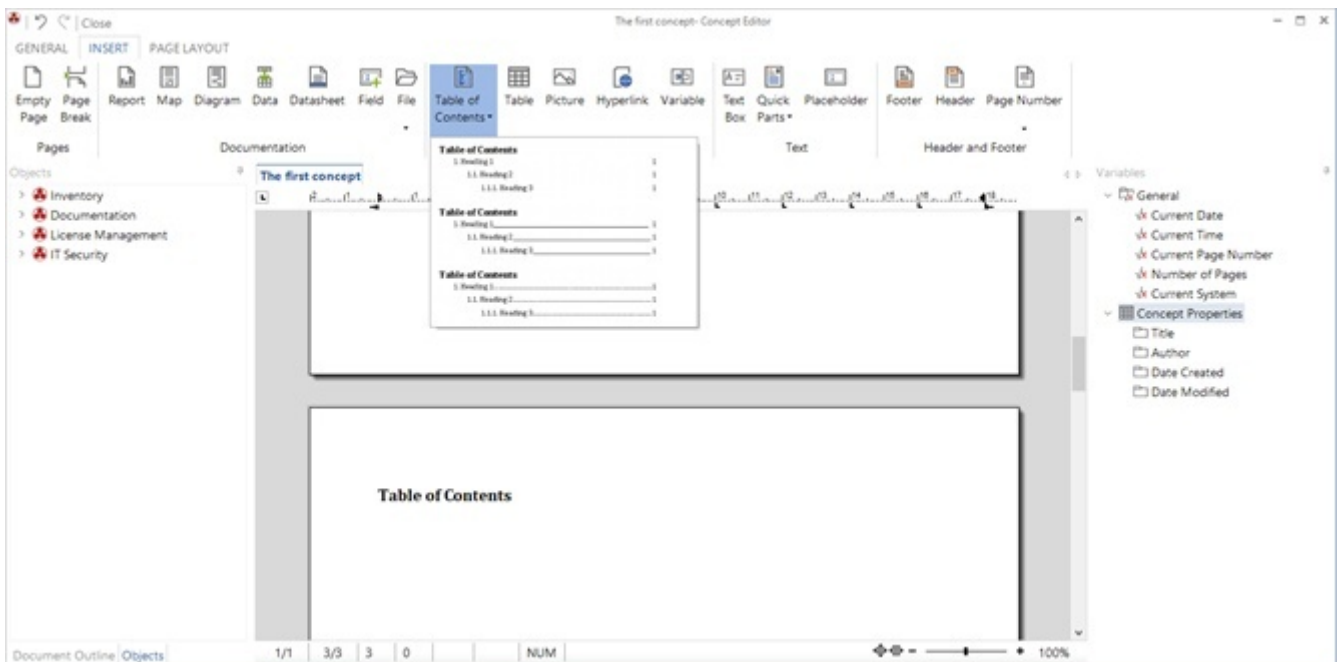


The variable *Title* was selected for the title. Drag and drop the variable into the concept. Afterwards, you can adjust the formatting using format templates - place the cursor in front of or behind the inserted variable. If you select the inserted variable, you cannot apply style sheets.

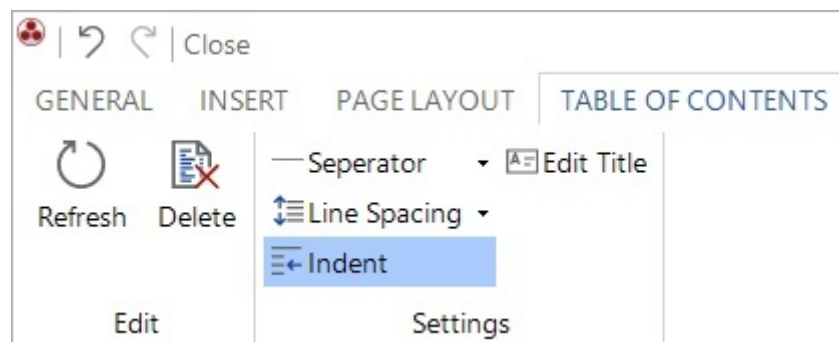
The variables **Date Created** and **Date Modified** were also used.

**Note:** Formatting of a variable can only be performed using format templates!

In the next step, the table of contents is inserted on a new page (Ctrl + Enter). The table of contents can be found in the tab **Insert - Table of Contents**:



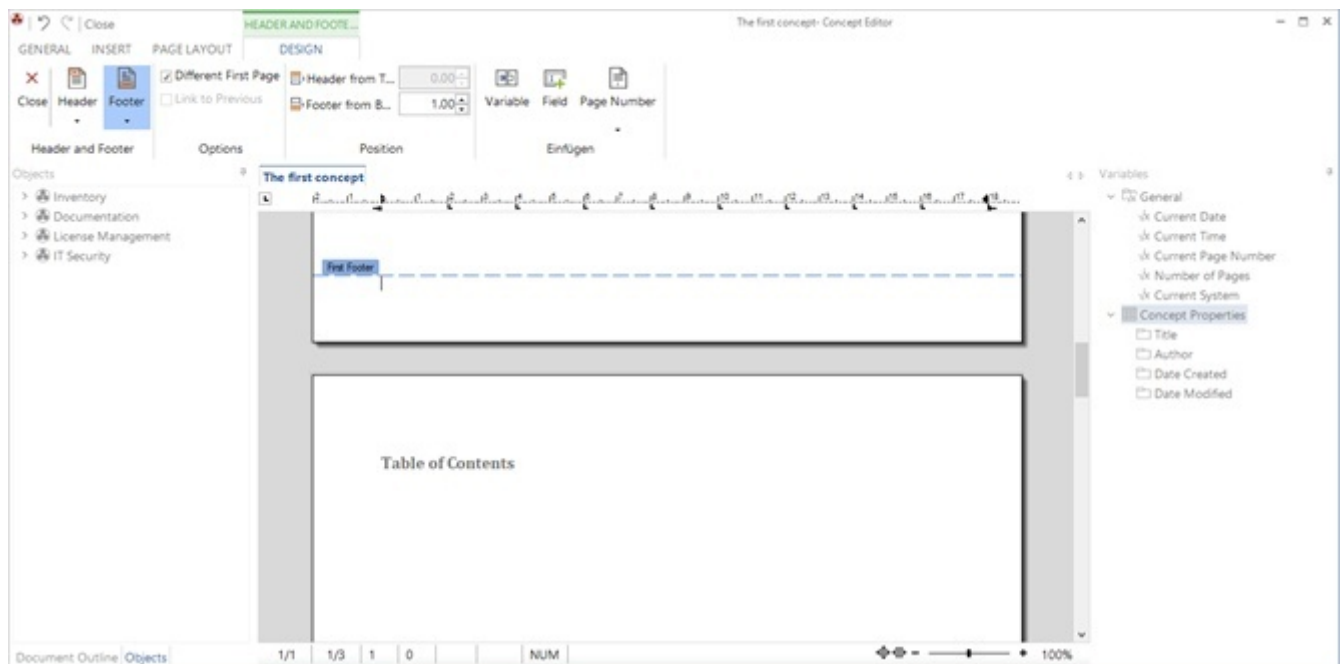
For example, if you click on the heading of the table of contents, or later on on the structure, you can edit the title of the table of contents and make further adjustments:



Now we add a header and a footer to the concept. You will also find the selection for this in the **Insert** tab and the **Header and Footer** group.

After selecting one of the two buttons, you can start the editing.

A new tab - **Design (Header and Footer)** - is available for selection. Here you can set the position and options. Here you will also find the option that the header and/or footer **on the first page** should be displayed **differently** or should not be present at all.



You can add variables for the headers and footers using **Insert-Area - Variable**.

## 3.2. CUSTOMIZE STYLE SHEETS

You can adjust the existing style sheets within the concept editor.

**IMPORTANT** to know that an adjustment of the style sheets only affects the style sheets within the selected concept.

This means that you should adapt the style sheets accordingly before creating a concept and save this change in the form of a new template (see [chapter 7](#))!

You can adjust the style templates with a right click - Change.

## 4. CONTENT

The concepts distinguish between static and dynamic content.

By **static content** we mean the content that you manually store in the concept - e.g. prose texts, tables, images, etc.

The **dynamic contents** are based on the information stored in Docusnap from the inventory or manual input and are added and created via a selection from the Insert area or via drag & drop from the object tree.

A link to this information is stored. If any of this information changes during inventory or manual input, these changes are also adjusted in concept - see [chapter 5](#) for more information on automatic updating.



Red marked are static contents and orange marked are dynamic contents.

Below **File** you will find dynamic and static files.

## 4.1. STATIC CONTENTS

You can store the following static content in a concept using the **Insert** tab:

### Spreadsheets

### Pictures

### Hyperlinks

- Also hyperlinks within the concept / document

### Text Boxes

### Quick Parts

### Static Files

- File contents of external documents can be integrated and then edited within the concept editor
- The following file formats are supported:
  - \*.docx;\*.doc;\*.txt;\*.rtf;\*.xml;\*.pdf;\*.htm;\*.html;\*.csv;\*.xls;\*.xlsx;\*.png;\*.jpg;\*.jpeg;\*.bmp;\*.tif;\*.tiff;\*.emf;\*.gif, \*. vsd;\*. vdx;\*. vsdx
  - For the static import of Visio files, Visio must be installed.

### Placeholders

- Placeholders are suitable for creating templates - see [chapter 7](#) for application examples

## 4.2. DYNAMIC CONTENTS

Dynamic contents are the following and are based on the data stock from the Docusnap database. This database is maintained through inventories and manual entries.

Reports

Maps

Diagrams

Data

Data Sheets

Fields

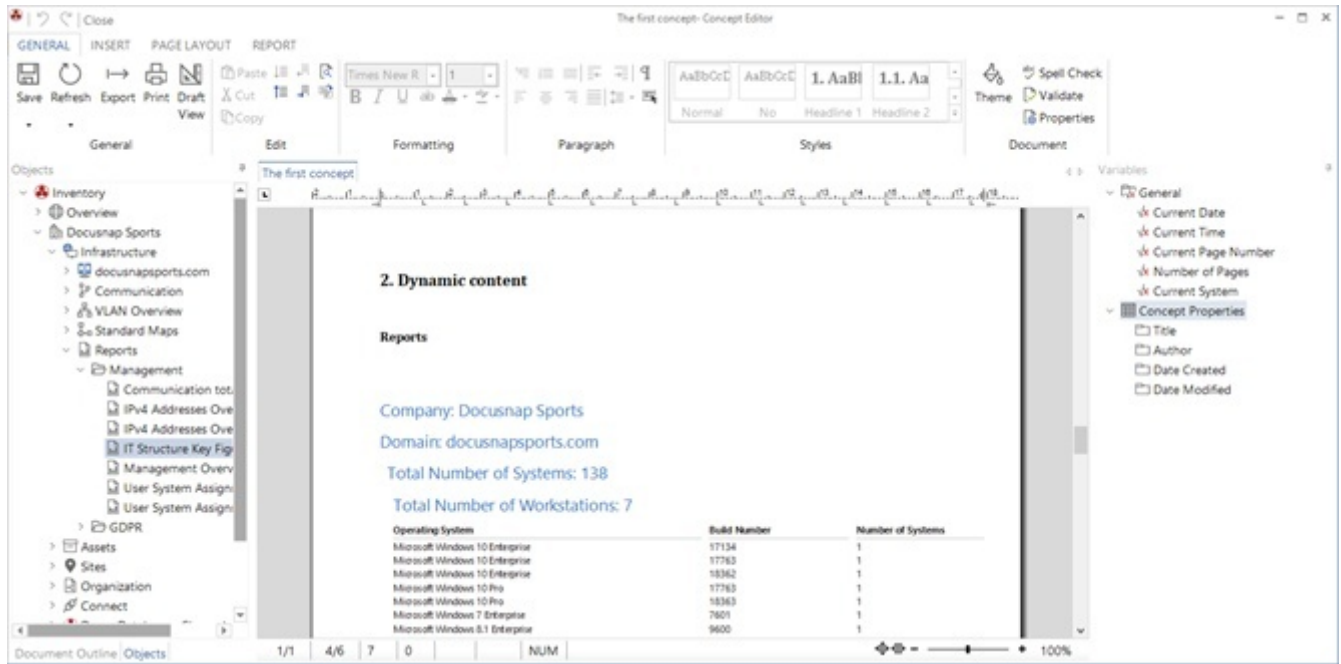
Dynamic Files

Variables

## 4.2.1. REPORTS

Select a report from the object tree - for example, IT Structure Key Figures (Company - Infrastructure - Domain - Management) and add it to the concept using Drag & Drop.

The **Report** tab is now available. Here you have the option **Remove page breaks**. Activate this option to remove the page breaks defined in the report - this way the report adapts better to the concept and its page size.



The screenshot shows the 'The first concept - Concept Editor' window. The 'REPORT' tab is active in the top menu. The left sidebar shows the 'Objects' tree with 'IT Structure Key Fig' selected under 'Management'. The main editor area displays the report content:

### 2. Dynamic content

#### Reports

Company: Docusnap Sports  
Domain: docusnapsports.com  
Total Number of Systems: 138  
Total Number of Workstations: 7

| Operating System                 | Build Number | Number of Systems |
|----------------------------------|--------------|-------------------|
| Microsoft Windows 10 Enterprise  | 17134        | 1                 |
| Microsoft Windows 10 Enterprise  | 17763        | 1                 |
| Microsoft Windows 10 Enterprise  | 18362        | 1                 |
| Microsoft Windows 10 Pro         | 17763        | 1                 |
| Microsoft Windows 10 Pro         | 18363        | 1                 |
| Microsoft Windows 7 Enterprise   | 7601         | 1                 |
| Microsoft Windows 8.1 Enterprise | 9600         | 1                 |

The right sidebar shows the 'Variables' panel with 'General' and 'Concept Properties' expanded. The status bar at the bottom indicates '1/1', '4/6', '7', '0', and 'NUM'.

## 4.2.2. MAPS

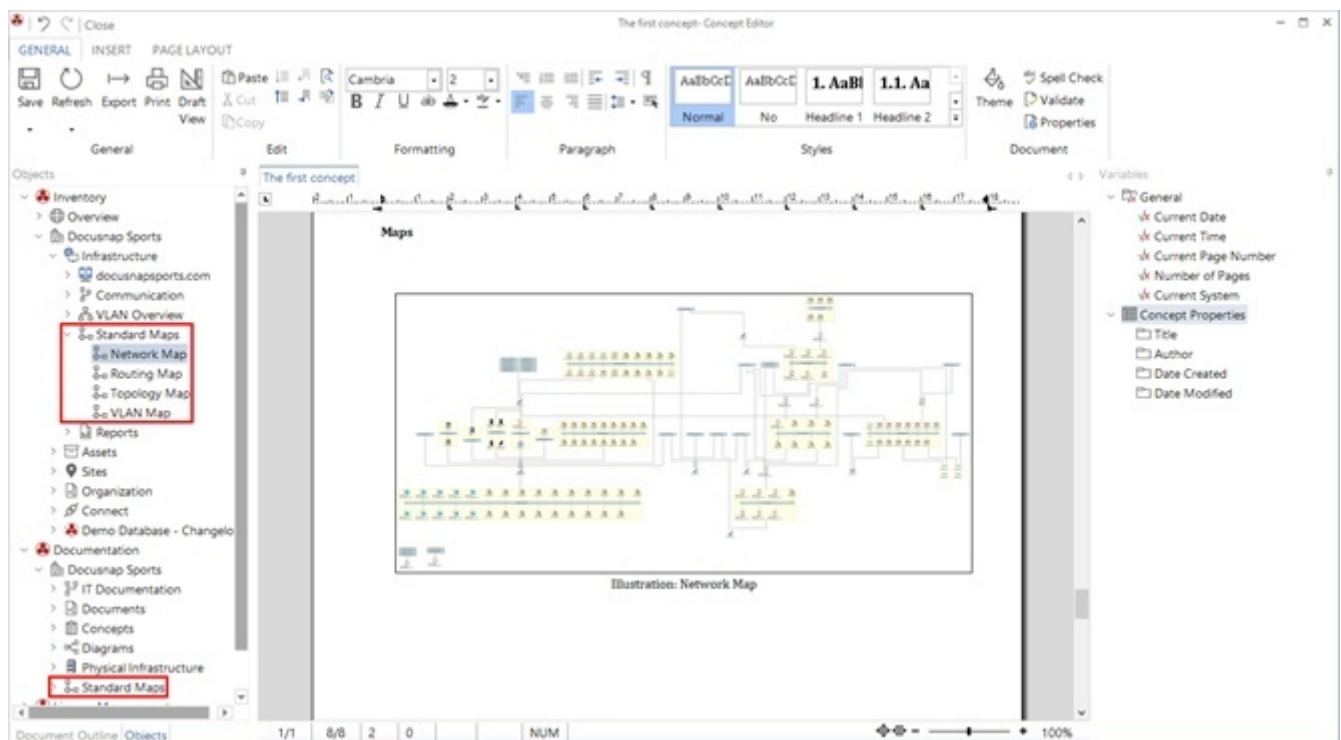
When integrating the available plans

- network map
- topology map
- location-based network map
- rack map
- VMware
- etc.

you must note that there are two types of maps. The standard maps (ad hoc plans) from the data tree and the maps from the documentation area.

### ***Standard Maps/ Ad Hoc maps***

The standard maps (ad hoc plans) are generated when the corresponding map is selected and are therefore always up-to-date.



## Maps from the documentation

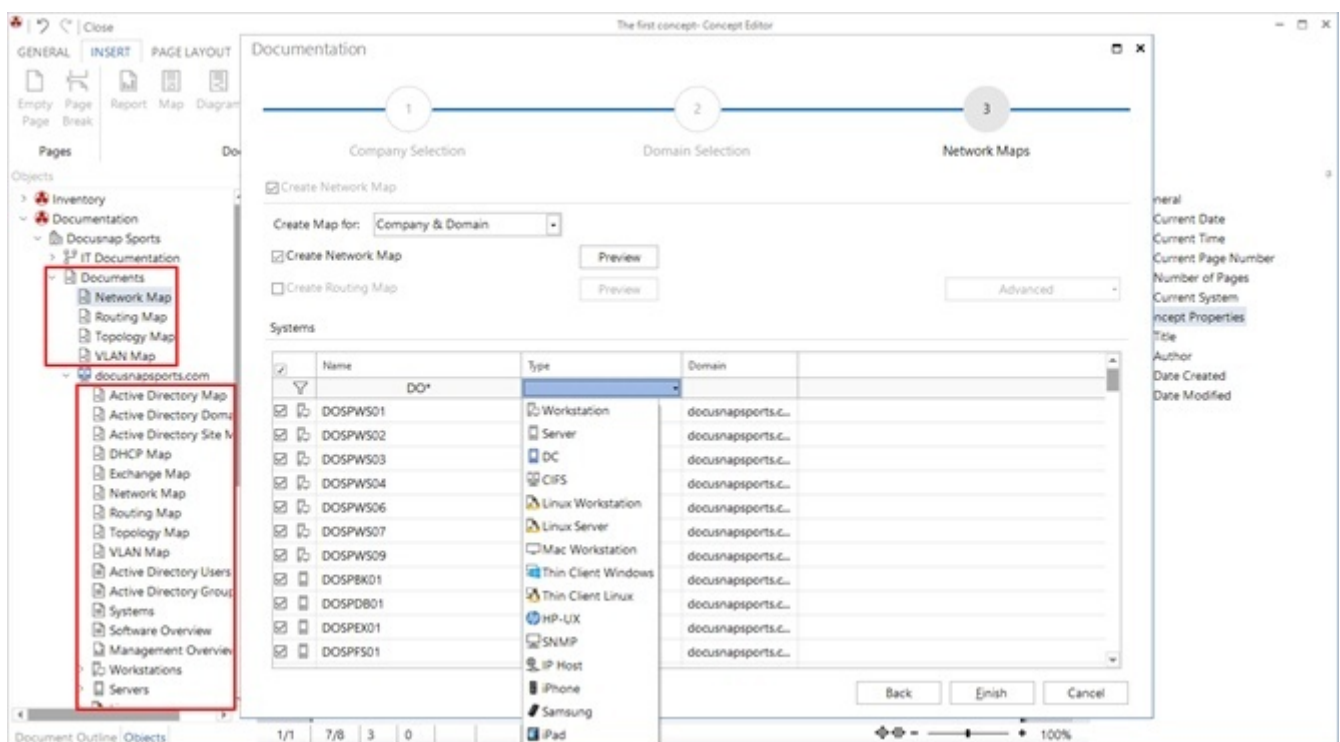
The maps from the documentation area are created once, stored on the file system (documentation path) and then included in the concept. Therefore, when using these maps, it must be taken into account that they are regularly recreated and thus updated!

Furthermore, it should be noted that these can also be VMware, HyperV, SQL, ADS plans, etc., which are only available in this area.

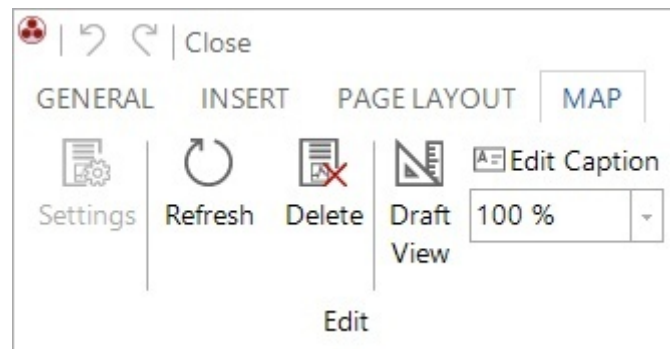
*Why do you want to use plans from the documentation area within a concept even though they are not automatically up-to-date?*

On the one hand, you want to use these plans because you can make further settings for the *standard maps* here. You can use the wizard to select how the map is to be created. For example, you can apply filters to system types or select only certain systems to be displayed in the map.

On the other hand, this is the only way you can create plans for Active Directory, DHCP, VMware, HyperV, and so on.



If you have now integrated a map into the concept, you can then edit the labeling and scaling:



Below you will find the integrated network map.

If you now do a right-click on the map and select **Update**, the network map of your environment will be placed.

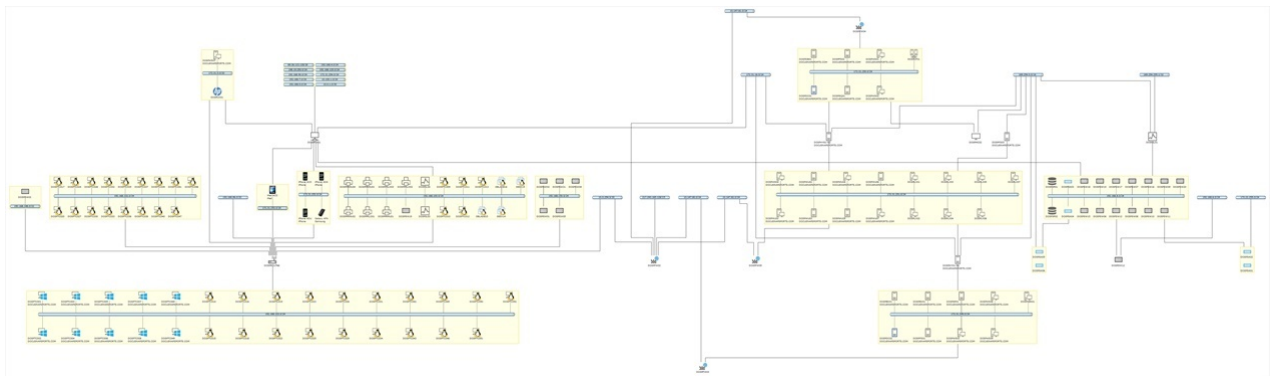


Illustration: Network Map

### 4.2.3. DATA

Data stands for the data areas in Docusnap - e.g. the tabular view of all inventoried servers. You can include these in the concept using Drag & Drop. The Docusnap Connect packages available in the data tree can also be stored in the concept.

The following is a list of all inventoried Windows servers:

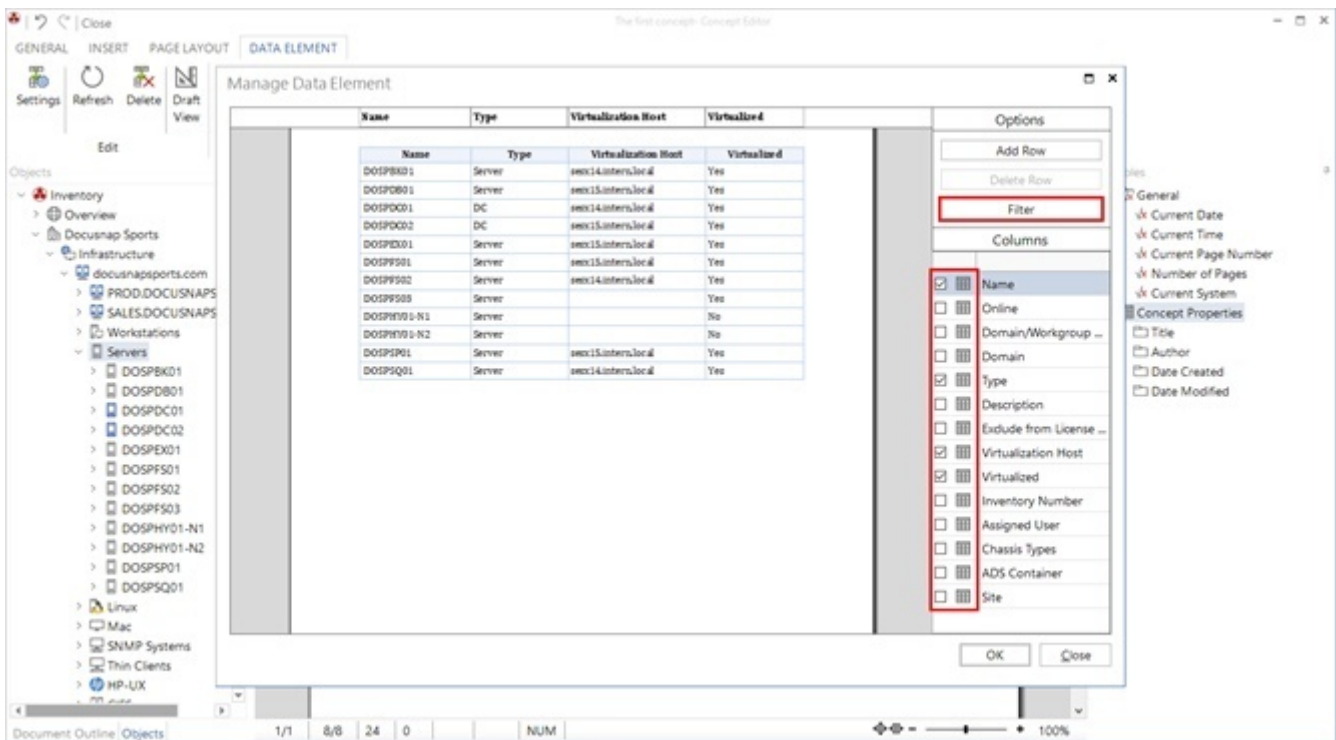
| Name        | Type   | Virtualization Host       | Virtualized |
|-------------|--------|---------------------------|-------------|
| DOSPBK01    | Server | sesx14.intern.local       | Yes         |
| DOSPDB01    | Server | sesx15.intern.local       | Yes         |
| DOSPD01     | DC     | sesx14.intern.local       | Yes         |
| DOSPD02     | DC     | sesx15.intern.local       | Yes         |
| DOSPEX01    | Server | sesx15.intern.local       | Yes         |
| DOSPF01     | Server | sesx15.intern.local       | Yes         |
| DOSPF02     | Server | sesx14.intern.local       | Yes         |
| DOSPF03     | Server | DOSPHY01 /<br>DOSPHY01-N1 | Yes         |
| DOSPHY01-N1 | Server | sesx14.intern.local       | No          |
| DOSPHY01-N2 | Server | sesx14.intern.local       | No          |
| DOSPSP01    | Server | sesx15.intern.local       | Yes         |
| DOSPSQ01    | Server | sesx14.intern.local       | Yes         |
| DOSPWU02    | Server | sesx14.intern.local       | Yes         |
| DOSPWU03    | Server | sesx15.intern.local       | Yes         |
| DOSPWU05    | Server | sesx14.intern.local       | Yes         |
| DOSPWU06    | Server | sesx15.intern.local       | Yes         |

Below are the members of the Domain Administrators group:

| Name           | ADS Class T... | Object SID                                    |
|----------------|----------------|-----------------------------------------------|
| Administrator  | User           | S-1-5-21-3246037710-462894881-2892528513-500  |
| ClusterAdmin   | User           | S-1-5-21-3246037710-462894881-2892528513-1342 |
| demodb_adm     | User           | S-1-5-21-3246037710-462894881-2892528513-1406 |
| dospbck        | User           | S-1-5-21-3246037710-462894881-2892528513-1380 |
| Srv_aadconnect | User           | S-1-5-21-3246037710-462894881-2892528513-1325 |
| srv_infra      | User           | S-1-5-21-3246037710-462894881-2892528513-1324 |

If you include such a list, you can double-click to select the columns to be displayed and set filters.

An asterisk "\*" stands for filtering as a placeholder. You can separate more than one filter criterion with a comma "," - e.g. *Filter1-\*, Filter2-\**.



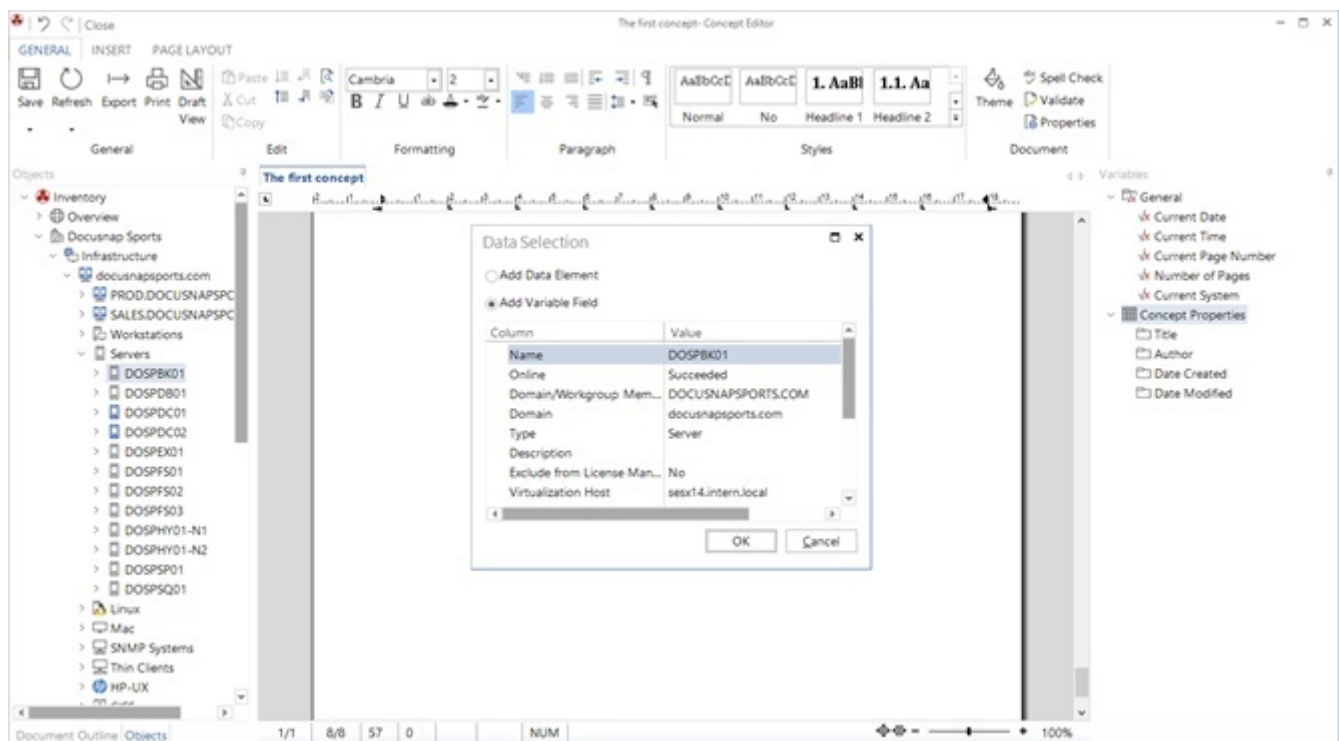
## 4.2.4. FIELDS

(Variable) fields are individual values for available objects - for example, the host name of a system, the name of an ADS user, and much more.

For example, if you drag and drop the object of a server into the concept, the **Data Selection** window appears. Here you have the following options

- Add Data Element (this content type was described in the previous chapter) and
- Add Variable Field

Select **Variable field** and then the desired column - e.g. Name



An application example refers to the cover pages of the concepts. For example, you could store your company information such as name, address, telephone, etc. here. If anything changes in this data, the new data is automatically updated for all concepts.

Furthermore, this example can also be applied to our system house customers who create cross-customer templates. By using fields the company information is loaded automatically.

For more information on the templates, see [chapter 7](#).

|              |                                                    |
|--------------|----------------------------------------------------|
| Company Name | Docusnap Sports                                    |
| Address      | Franz-Larcher-Str. 4, 83088 Kiefersfelden, Germany |
| Phone        | +49 8033 6978 – 4000                               |
| E-Mail       | info@docusnap.com                                  |

#### 4.2.5. DATA SHEETS

Within the data sheets you will find all the information that has been inventoried for a system. Within the data tree you will find the data sheets as reports - e.g. *System Summary* - below a Windows Server.

#### 4.2.6. DYNAMIC FILES

In chapter 4.1 the integration of static files was discussed - in short, this is the copying and pasting of content from external documents. The further processing of the files takes place within the concept in Docusnap.

This is different for dynamic files - here you load the content from external documents into the concept. If the external document is now changed, this change is also adopted in the concept.

If the external document is deleted or renamed, it can no longer be included:

| Dateielement                                                            |
|-------------------------------------------------------------------------|
| Fehler beim Laden des Elements. (C:\Users\KRE\Desktop\Dynamic File.png) |
| Die ausgewählte Datei existiert nicht!                                  |

The following file formats are supported for dynamic import:

\*.docx;\*.doc;\*.txt;\*.rtf;\*.xml;\*.pdf;\*.htm;\*.html;\*.csv;\*.xls;\*.xlsx;\*.png;\*.jpg;\*.jpeg;\*.bmp;\*.tif;\*.tiff;\*.emf;\*.gif

PDF files are not 100% supported. It may happen that parts of the document cannot be imported or formatted correctly.

For Excel files, the appropriate ACE drivers must be installed (64 bit or 32 bit - depending on OS and Docusnap version).

Importing Excel files will fail if the 32-bit version of Office is installed, but the system itself is 64-bit.

The following error message occurs during import:

***ACE drivers are not installed. Please visit.....***

You must also note that Visio files can only be integrated statically. An alternative to this is to convert the Visio file into an image file and integrate it into the concept as a dynamic file.

#### 4.2.7. THE DYNAMICS IN DETAIL

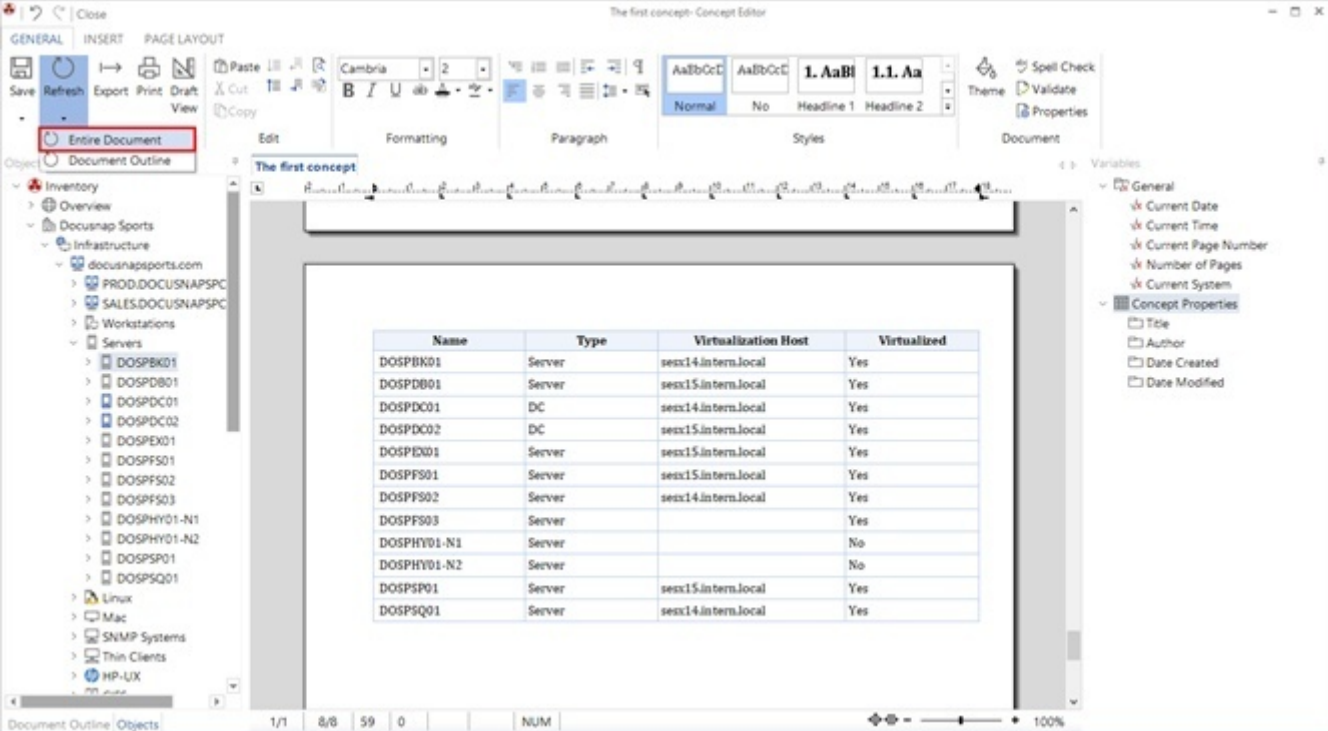
All dynamic content is reloaded on the current basis when the concept is updated.

If the concept is updated after 6 weeks (manually or [automatically](#)), you have automatically

- the current server inventory and other system overviews
- software installations
- releases and their authorizations
- group memberships
- etc.

within the concept on the current state.

The prerequisite for this is that the inventories are carried out in a planned manner.



The screenshot displays the 'The first concept - Concept Editor' window. The main editing area contains a table with the following data:

| Name        | Type   | Virtualization Host | Virtualized |
|-------------|--------|---------------------|-------------|
| DOSPBK01    | Server | sess14.intern.local | Yes         |
| DOSPD01     | Server | sess15.intern.local | Yes         |
| DOSPD01     | DC     | sess14.intern.local | Yes         |
| DOSPD02     | DC     | sess15.intern.local | Yes         |
| DOSP01      | Server | sess15.intern.local | Yes         |
| DOSP02      | Server | sess14.intern.local | Yes         |
| DOSP03      | Server |                     | Yes         |
| DOSPHY01-N1 | Server |                     | No          |
| DOSPHY01-N2 | Server |                     | No          |
| DOSP01      | Server | sess15.intern.local | Yes         |
| DOSP01      | Server | sess14.intern.local | Yes         |

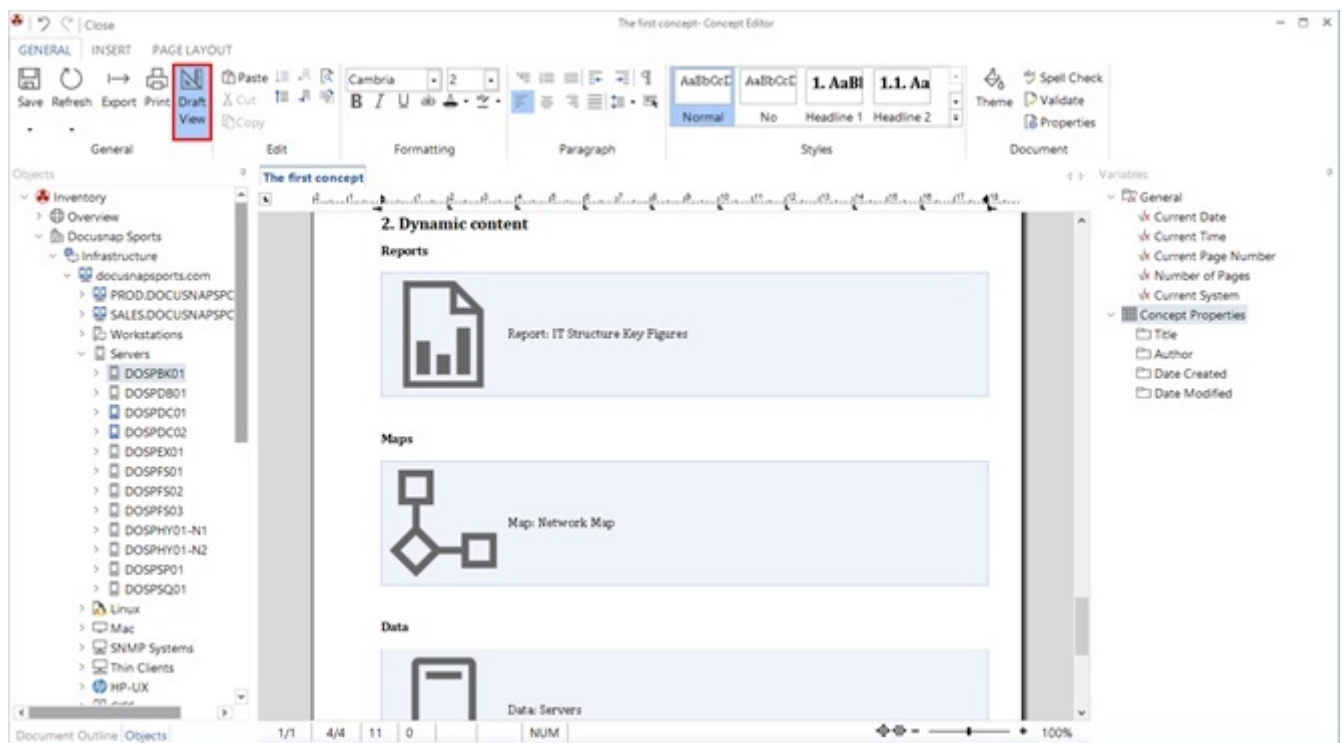
The interface includes a top menu bar with 'GENERAL', 'INSERT', and 'PAGE LAYOUT'. Below the menu is a toolbar with various editing tools. The left sidebar shows a tree view of the document structure, and the right sidebar shows 'Variables' and 'Concept Properties'.

### 4.3. DRAFT VIEW

Your concept can grow rapidly over time as you add more dynamic content. To keep the concept clear for you, you can move the dynamic content to a draft view that requires only a fraction of the space.

In the tab **General** you will find the button **Draft View** - this will move all contents into the design view:

You can also move only individual content to the draft view by right-clicking on the content and then selecting **Draft View**.

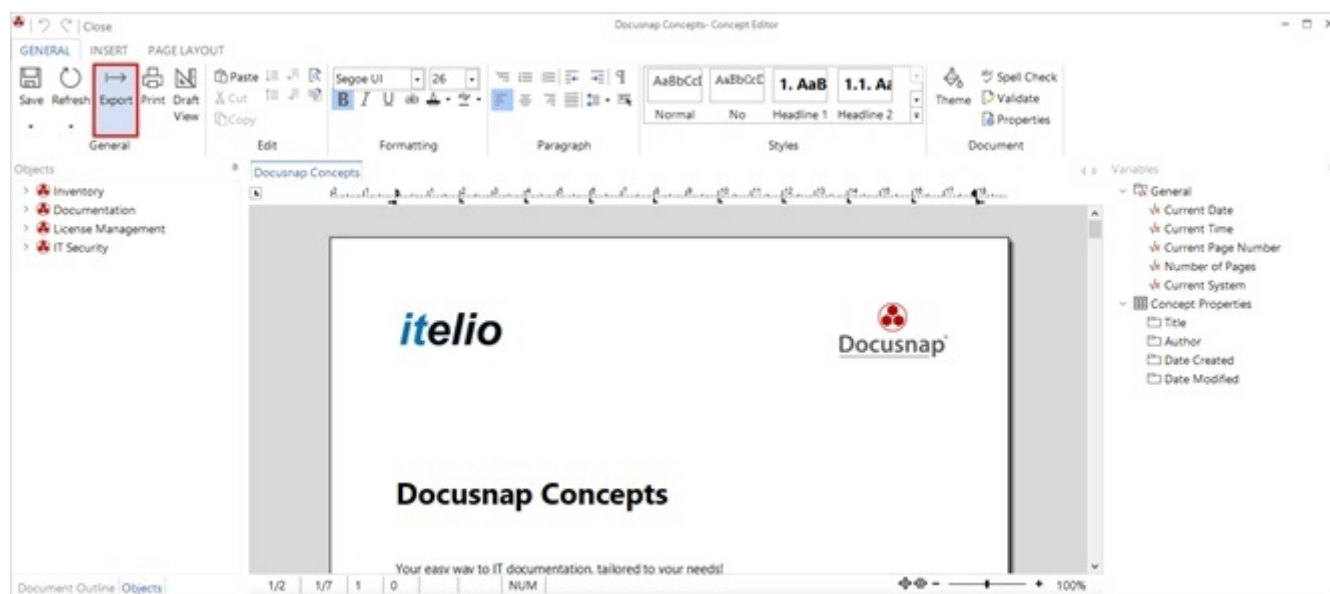


## 5. OUTPUT

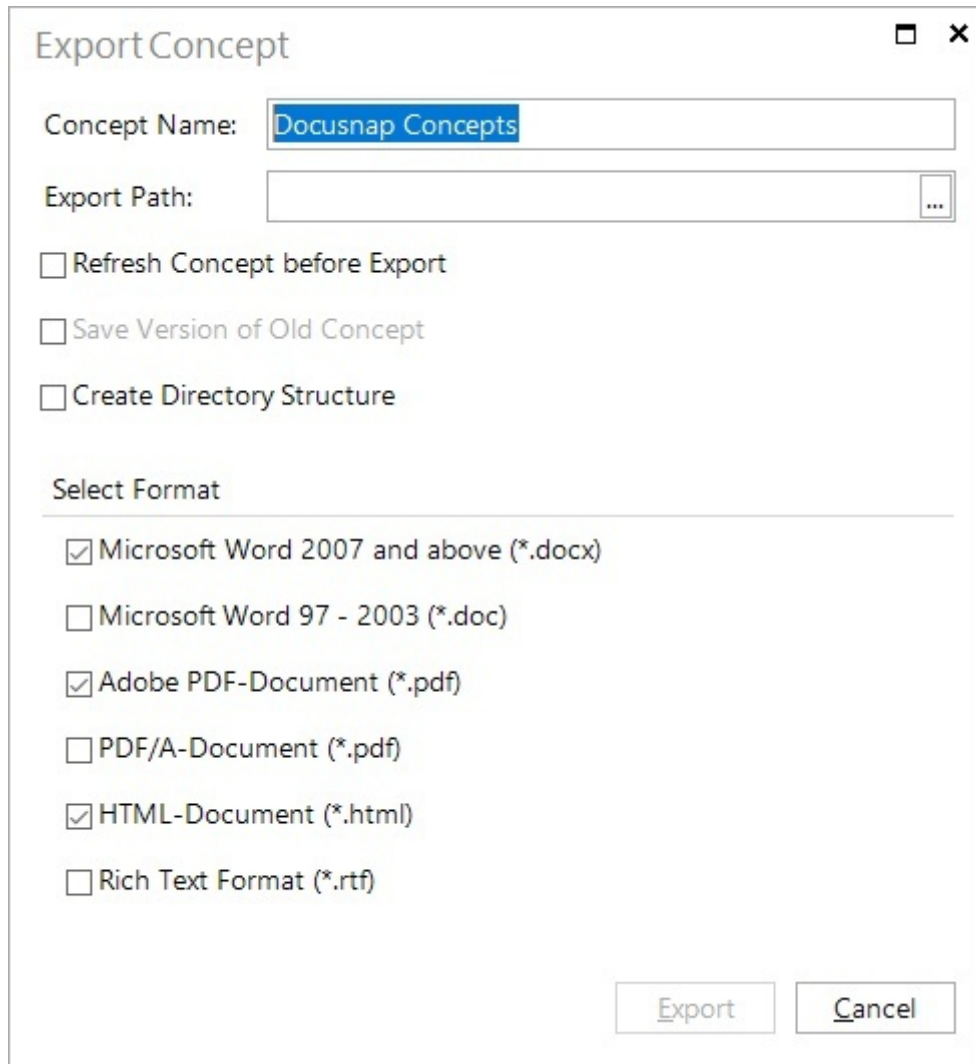
You can export finished IT concepts manually or automatically according to a schedule and thus make them available outside Docusnap.

### 5.1. MANUAL EXPORT

The manual export is carried out in the course of the currently logged in user and can be carried out via the **Export** button in the **General** tab



After selecting the button the **Export Concept** dialog appears. Here you have the possibility to adapt the concept name and to specify the export path.



The 'Export Concept' dialog box is shown with the following fields and options:

- Concept Name:** A text field containing 'Docusnap Concepts'.
- Export Path:** A text field with a browse button (three dots) to the right.
- Refresh Concept before Export:** An unchecked checkbox.
- Save Version of Old Concept:** A disabled (grayed out) unchecked checkbox.
- Create Directory Structure:** An unchecked checkbox.
- Select Format:** A section with a horizontal line separator containing several radio button options:
  - ☒ Microsoft Word 2007 and above (\*.docx)
  - ☐ Microsoft Word 97 - 2003 (\*.doc)
  - ☒ Adobe PDF-Document (\*.pdf)
  - ☐ PDF/A-Document (\*.pdf)
  - ☒ HTML-Document (\*.html)
  - ☐ Rich Text Format (\*.rtf)
- Buttons:** 'Export' and 'Cancel' buttons at the bottom right.

### Refresh Concept before Export

The dynamic contents are inserted on the basis of the current inventories. Reports, plans etc. are brought up to date.

### Save Version of Old Concept

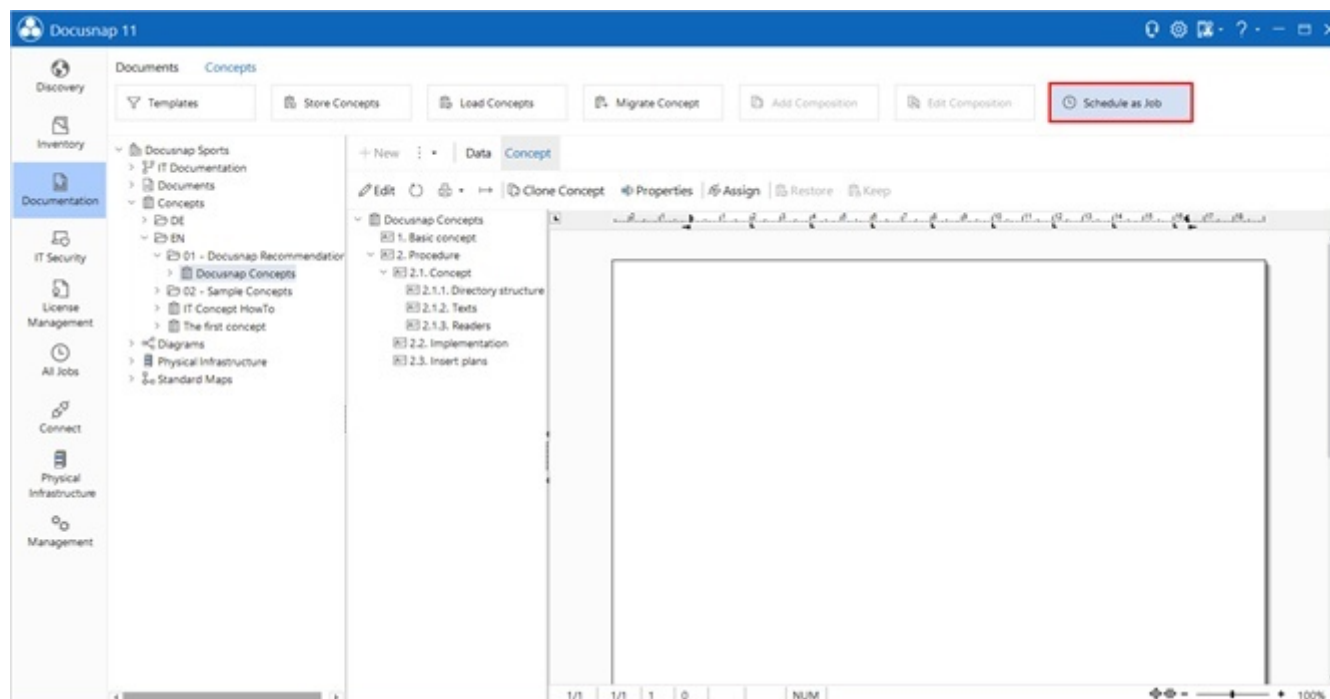
If an older version of the concept is to be recorded before export and saved below the concept, this can be done with the help of this function. However, this is only possible if the option *Refresh Concept before Export* was selected beforehand. Otherwise, the function is grayed out for you (see previous figure).

### Create Directory Structure

Using this function, the directory structure created in Docusnap is also set up on the file system and the concepts are stored in the corresponding folders.

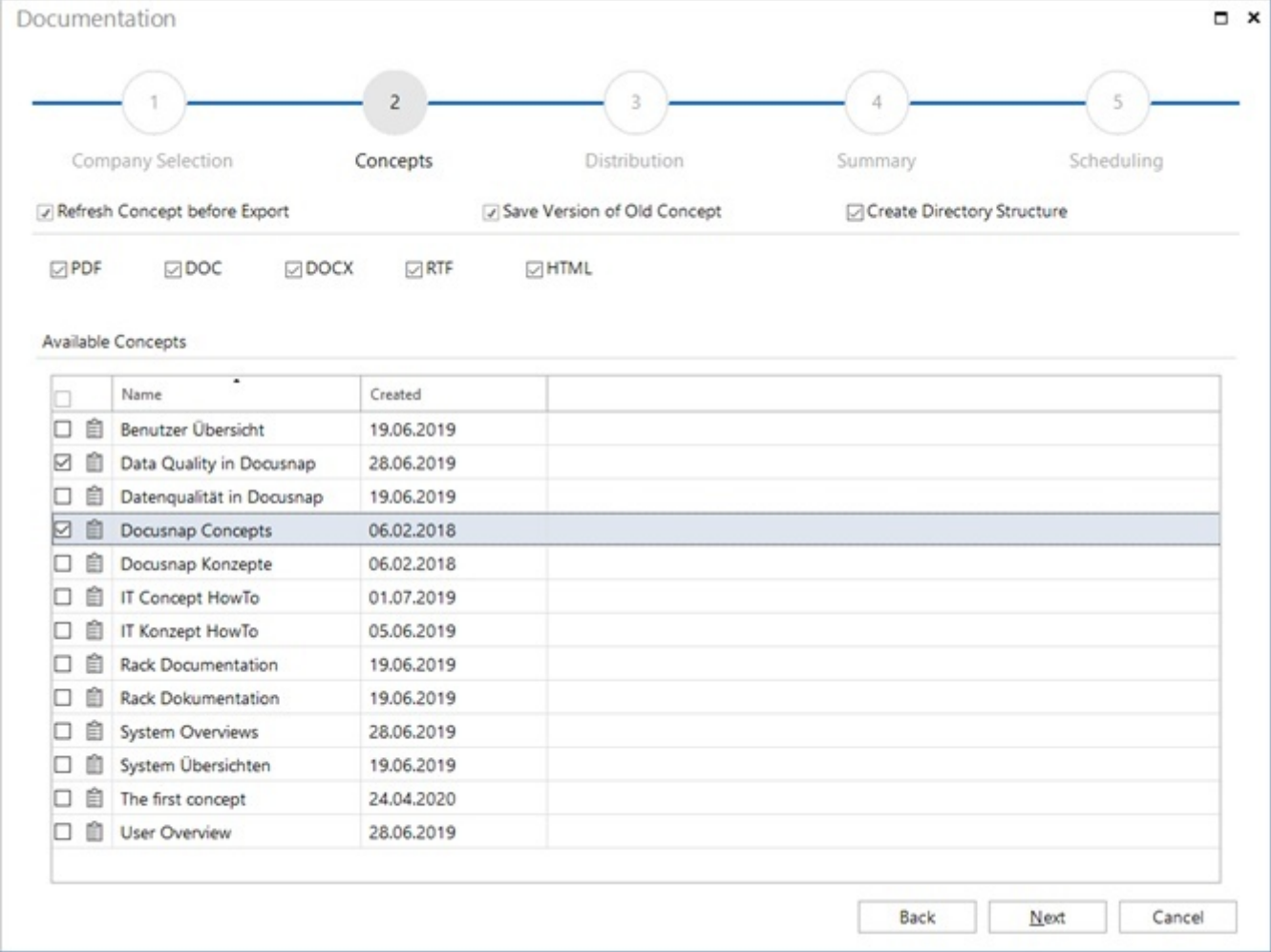
## 5.2. AUTOMATED EXPORT

The Docusnap server service can be used as an automated export. The time-controlled order is realised via the button ***Schedule as Job***. It is important to note here that the user or the stored service account of the server service has sufficient authorizations (Change) for the specified documentation path.



In the first step of the wizard, you select whether the IT concepts are to be stored on an alternative documentation path.

In step 2 you select the concepts and the file format which are to be exported via this job.



**Documentation**

1 Company Selection    2 **Concepts**    3 Distribution    4 Summary    5 Scheduling

☒ Refresh Concept before Export    ☒ Save Version of Old Concept    ☒ Create Directory Structure

☒ PDF    ☒ DOC    ☒ DOCX    ☒ RTF    ☒ HTML

Available Concepts

| <input type="checkbox"/>            | Name                      | Created    |
|-------------------------------------|---------------------------|------------|
| <input type="checkbox"/>            | Benutzer Übersicht        | 19.06.2019 |
| <input checked="" type="checkbox"/> | Data Quality in Docusnap  | 28.06.2019 |
| <input type="checkbox"/>            | Datenqualität in Docusnap | 19.06.2019 |
| <input checked="" type="checkbox"/> | Docusnap Concepts         | 06.02.2018 |
| <input type="checkbox"/>            | Docusnap Konzepte         | 06.02.2018 |
| <input type="checkbox"/>            | IT Concept HowTo          | 01.07.2019 |
| <input type="checkbox"/>            | IT Konzept HowTo          | 05.06.2019 |
| <input type="checkbox"/>            | Rack Documentation        | 19.06.2019 |
| <input type="checkbox"/>            | Rack Dokumentation        | 19.06.2019 |
| <input type="checkbox"/>            | System Overviews          | 28.06.2019 |
| <input type="checkbox"/>            | System Übersichten        | 19.06.2019 |
| <input type="checkbox"/>            | The first concept         | 24.04.2020 |
| <input type="checkbox"/>            | User Overview             | 28.06.2019 |

Back    Next    Cancel

Here you have the same options that were already introduced during the manual export:

- Refresh Concept before Export
- Save Version of Old Concept
- Create Directory Structure

Be aware of the importance of the option **Refresh Concept before Export** and activate it! This option ensures that your documentation remains up-to-date and that reports, plans, etc. are reloaded.

### 5.2.1. E-MAIL DISTRIBUTION

Step 3 gives you the opportunity to send the previously selected concepts directly by e-mail. For this, however, you must have configured the e-mail settings of the Docusnap server service.

Documentation

1

2

3

4

5

Company Selection

Concepts

Distribution

Summary

Scheduling

☒ E-Mail Distribution

Recipient:

recipient@docusnap.com

Subject:

Docusnap: Automatic export and e-mail sending of concepts

Message:

The automatically exported and mail-sent concepts are available in the attachment.

Back

Next

Cancel

### 5.3. FILE FORMATS FOR EXPORT

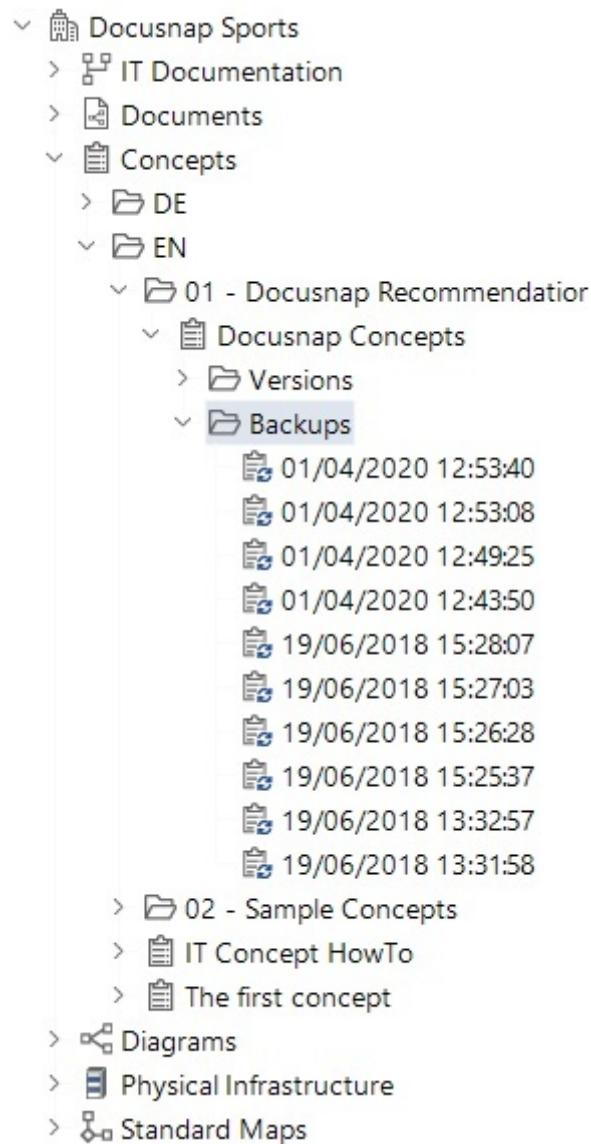
Both the manual and automatic export of the concepts provides you with the following file formats:

- Microsoft Word from 2007 (\*. docx)
- Microsoft Word 97 - 2003 (\*. doc)
- Adobe PDF document (\*. pdf)
- PDF/A document (\*. pdf)
- HTML document (\*. html)
- Rich Text Format (\*.rtf)

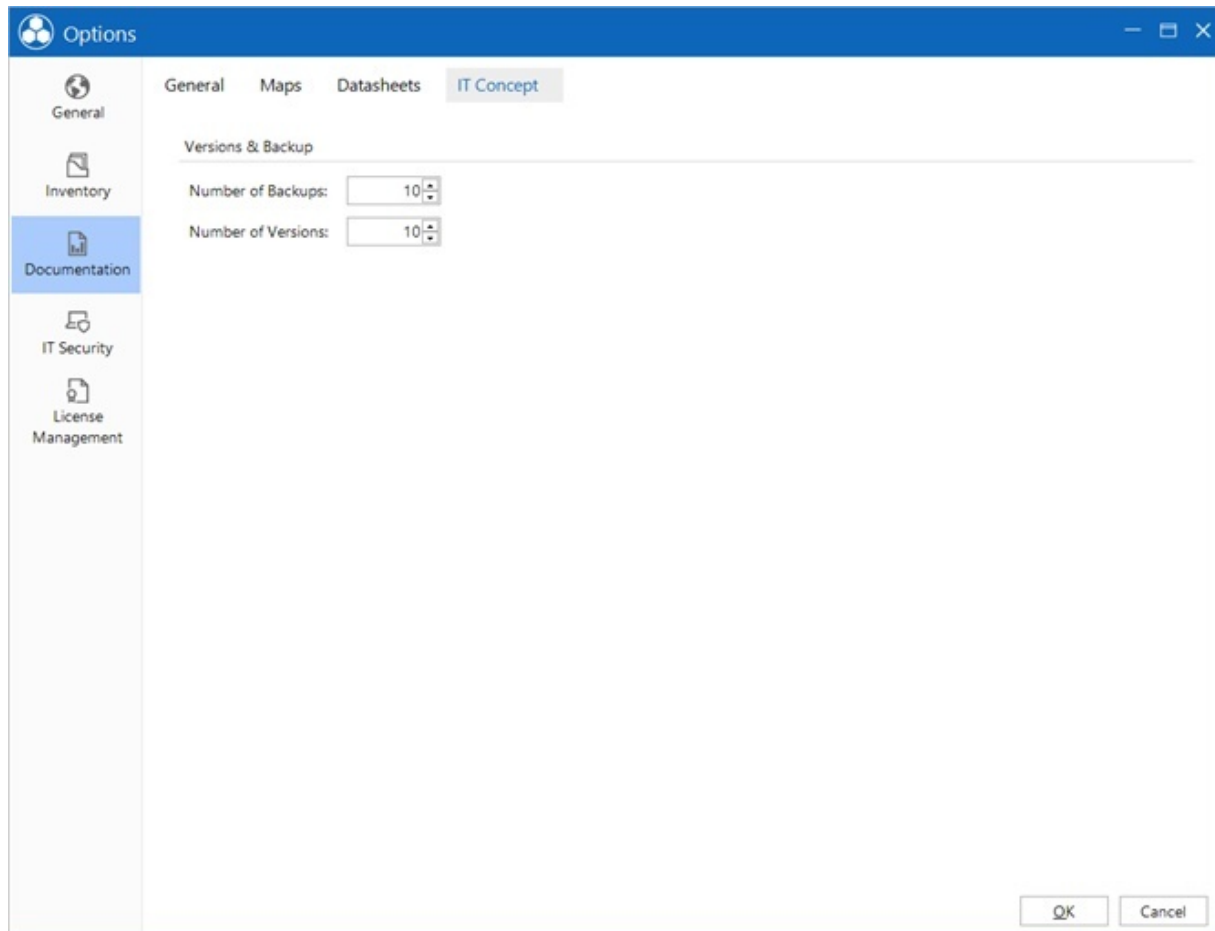
## 6. MANAGE CONCEPTS

### 6.1. BACKUPS

As soon as you save a concept, a backup version is created. This offers you the possibility to fall back on older versions and also to recognize changes better. The backups can be found in the tree structure, below the concept, in the subfolder **Backups**.

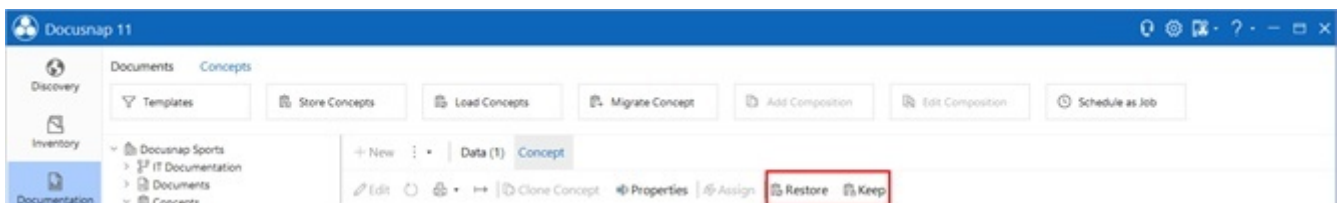


Up to 10 backups per concept are stored by default. The number of versions can be adjusted in the **Options - Documents** dialog in the main Docusnap interface. If the stored number is reached, older backups are overwritten.



Two buttons are available on the **Versions/Backup** tab:

- Restore
- Keep



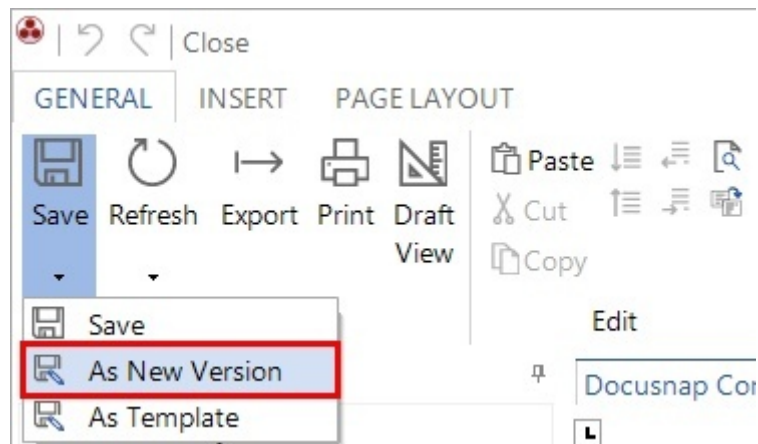
You can use the **Restore** function to restore a created backup. The current state of the concept is replaced by the selected backup version.

The **Keep** button can be used to specify that the selected backup will not be deleted. The Delete function is then grayed out.

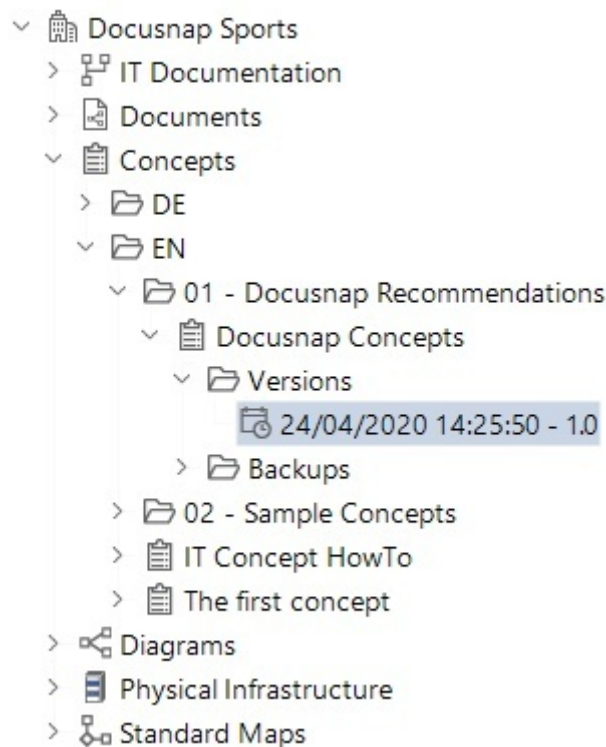
## 6.2. VERSIONS

In addition to the backups, you can also create different versions of an IT concept. The extension or change of a version status is thus better comprehensible.

If the concept is open, such a version can be created via the button **Save** and then **As New Version**.



This version can be found below the concept in the subfolder **Versions**

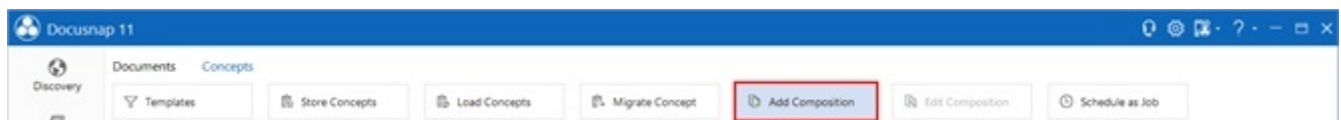


As already described in [chapter 6.1](#) the number of versions, as well as the recovery and fixation can be performed identically to the backups.

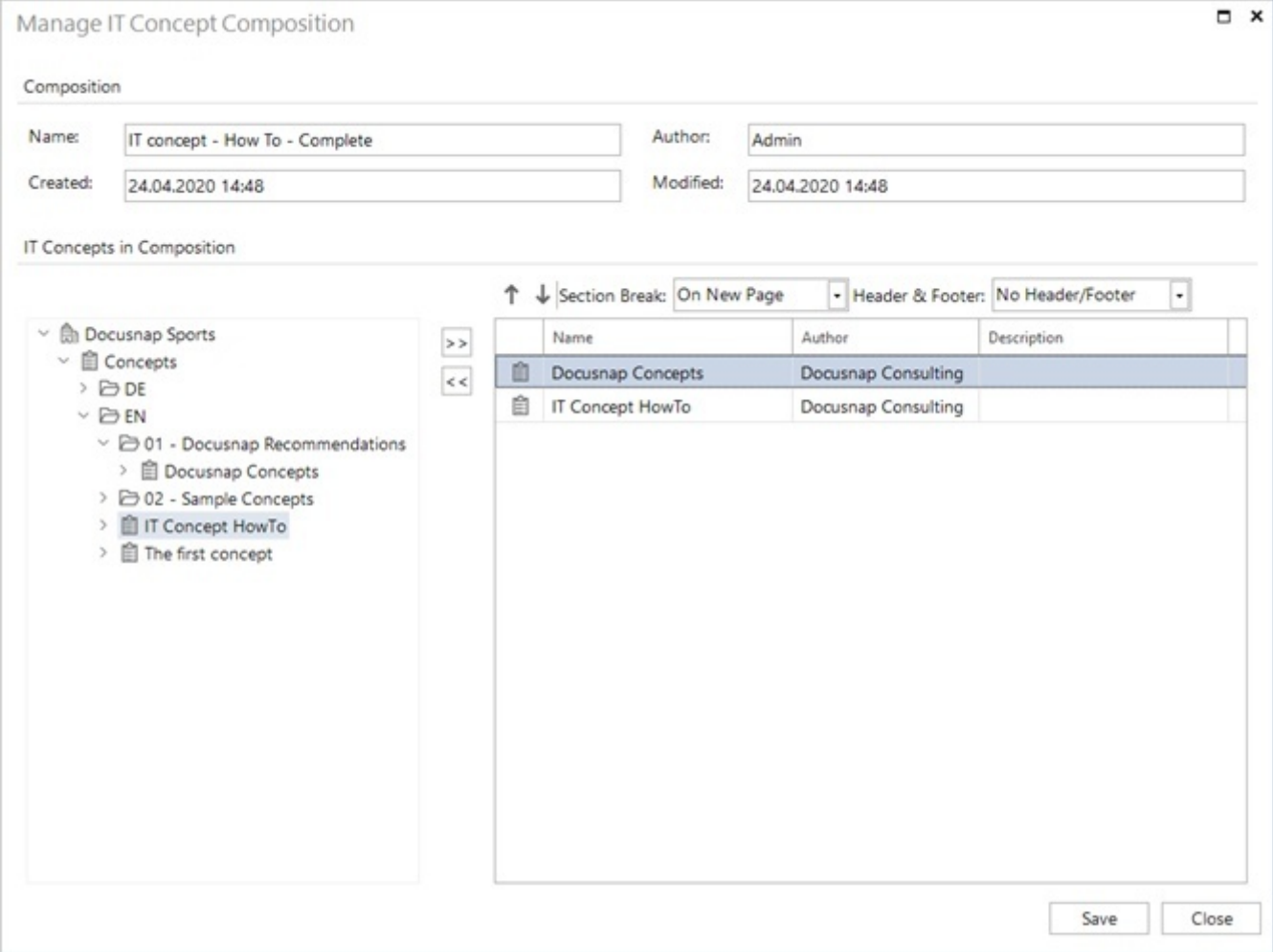
### 6.3. COMPOSITION

In many cases, it makes sense to divide up larger concepts so that it is easier to edit it by several colleagues. This makes it possible to combine several concepts into a complete document using the **Composition** function. If the individual concepts are changed, this also has an effect on the compiled document.

If the **Concepts** node is selected in the inventory tree, the **Add** button is available for selection in the **Composition** tab. Thus a new combination of individual concepts can be realized.



Opening the dialog for the composition requires fields, which must be filled in. You can enter the name for the document in the top left-hand corner. To the right the author is deposited. In the standard system, the logged-in user name is entered, which can be adjusted manually. The Created and Modified fields are dynamically affected when the document is saved.



**Manage IT Concept Composition**

**Composition**

Name:  Author:

Created:  Modified:

**IT Concepts in Composition**

Section Break:  Header & Footer:

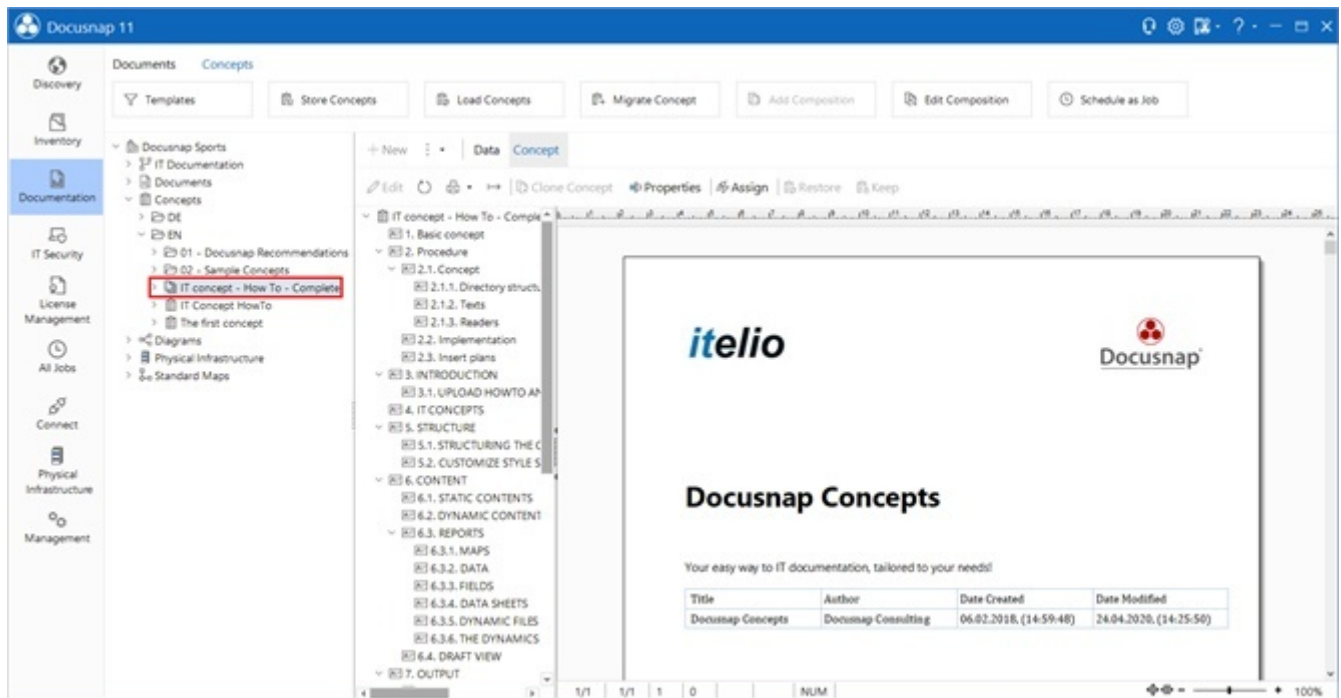
| Name                                                                                                | Author              | Description |
|-----------------------------------------------------------------------------------------------------|---------------------|-------------|
|  Docusnap Concepts | Docusnap Consulting |             |
|  IT Concept HowTo  | Docusnap Consulting |             |

In the left field all concepts of the current company are listed. Using the arrow buttons >> and <<, the concepts can be added or removed.

The Section break drop-down box determines whether the selected concept should start on a new page or be added to the next line after the end of the previous concept.

For the header and footer, you can define whether no header/footer, the header/footer of the previous concept, or the header/footer of the selected concept is to be used.

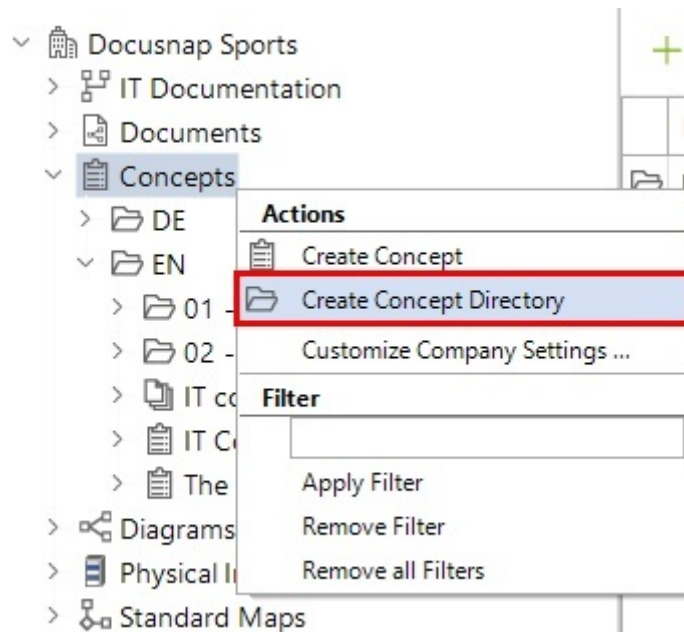
If the dialog is closed with the **Save** button, the merged document is saved in the inventory tree. The contents are loaded after you have chosen the tab Update Concept have chosen.



## 6.4. DIRECTORY

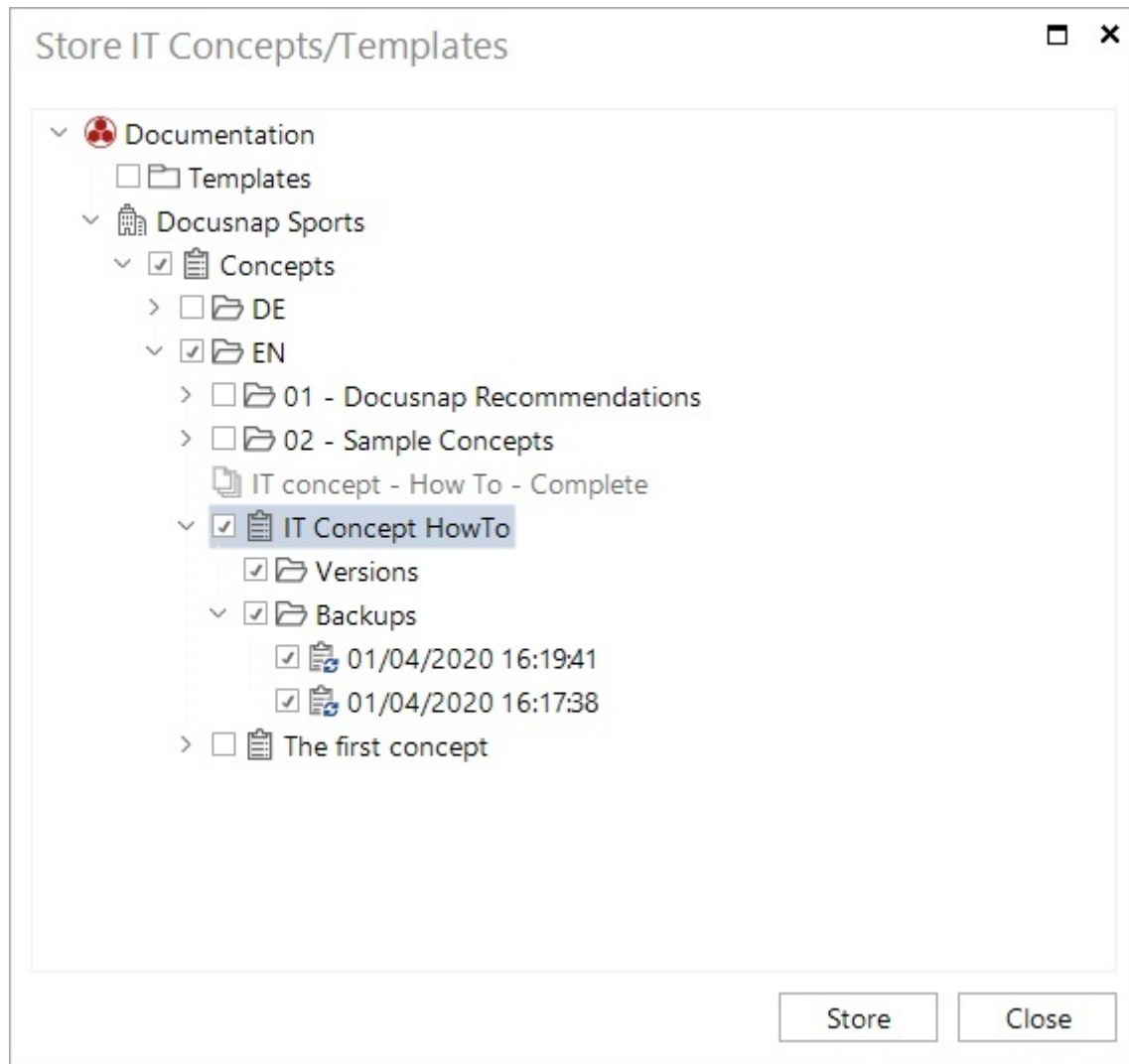
Within the tree structure, you can create concept directories and store the concepts in them. A new directory can be created by right-clicking **Create Concept Directory** or by clicking on the **New - Concept Directory** button. Existing concepts can be moved between the directories by drag & drop.

The created directory structure can be created on the file system for both [manual](#) and [automated](#) exports.



## 6.5. STORE CONCEPTS

The dialog for saving existing concepts and concept templates is opened in the **Other** tab via the **Store Concepts** button. You can use the checkboxes to select the objects you want to save. Saving also serves as an export option so that the concepts can be used in other Docusnap environments using the import function (next chapter - Loading Concepts).



## 6.6. LOAD CONCEPTS

The dialog for importing the desired concept files can be opened using the **Load Concepts** button in the **Other** tab.

After selecting the dcc file, you can import the required concepts and concept templates.

You can select in the **Import mode** combo box:

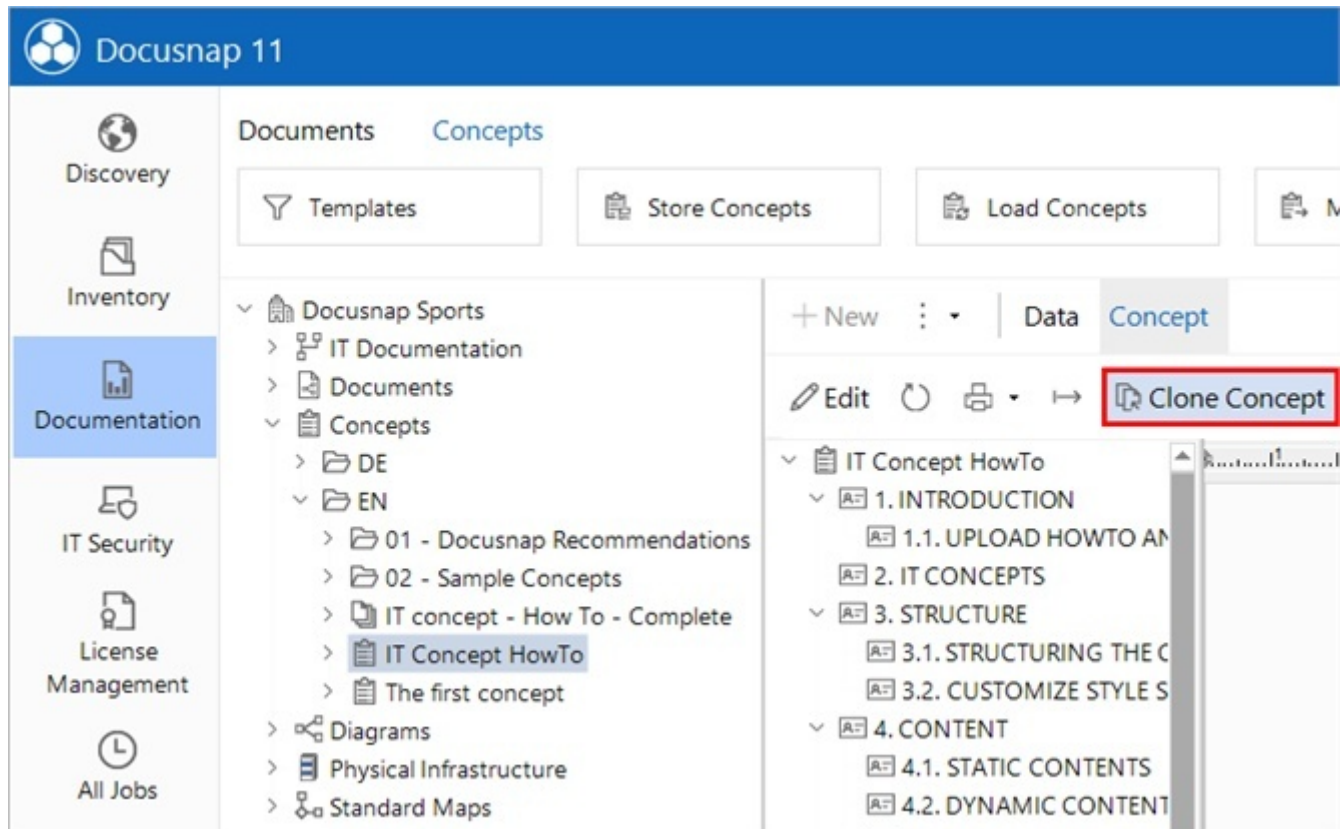
- Do not overwrite existing concepts/templates
- Overwrite older concepts/templates
- Overwrite existing concepts/templates
- Provide these concepts for another company

### Provide these concepts for another company

This option causes the content of the concept to be adapted to the company to which the concepts are loaded. You should always use this option if you want to integrate concepts into your Docusnap instance.

## 6.7. CLONE CONCEPTS

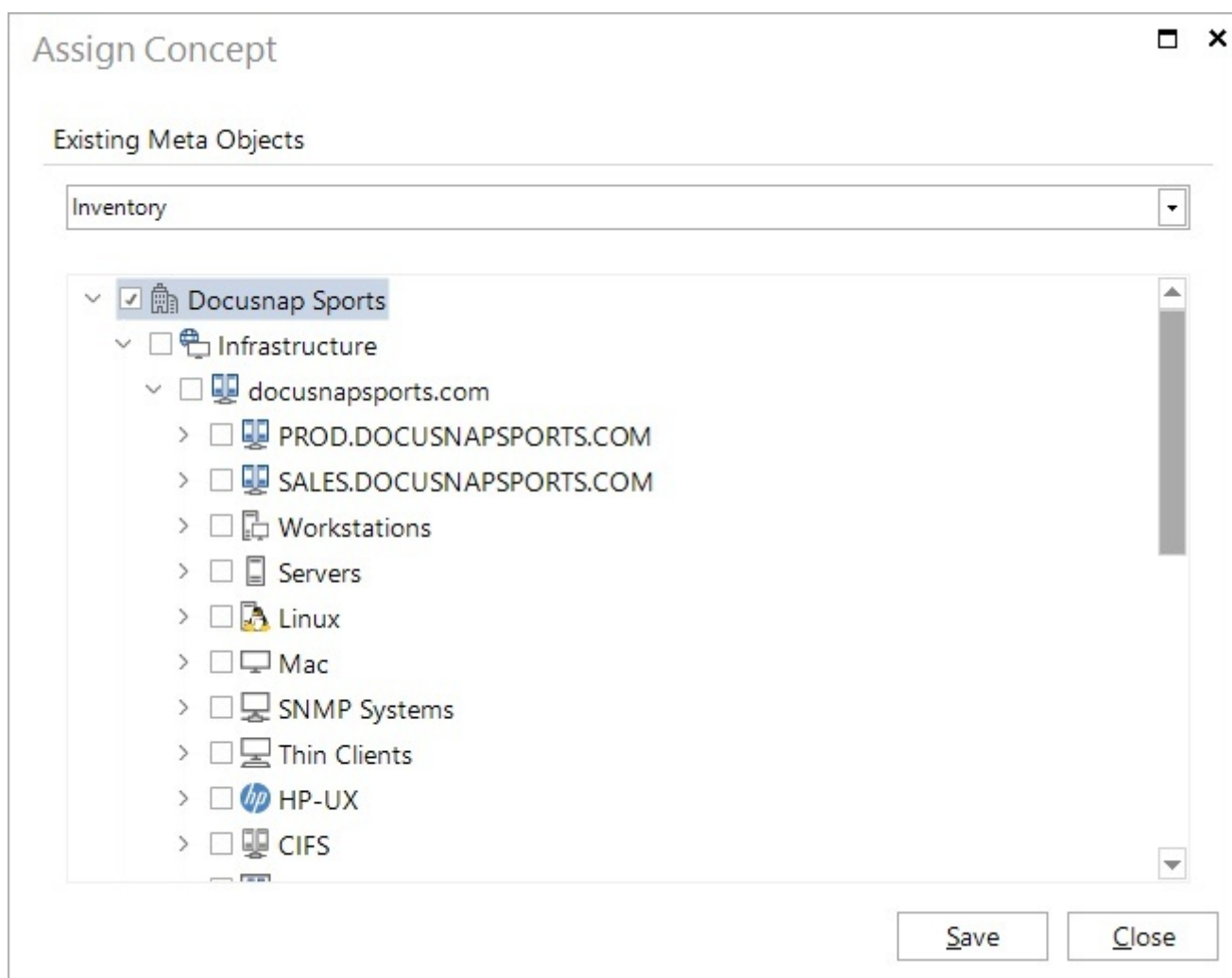
If a certain concept is selected in the inventory tree, you can select the **Clone Concept** item in the **Concept** tab. This enables the simple cloning of a concept. The concept is duplicated below the selected concept and the extension – *Copy* is added.



## 6.8. ASSIGN CONCEPTS

The **Assign** button in the **Other** tab, allows you to mount concepts and directories anywhere in the inventory tree.

To do this, the desired concept must be selected and the Assign button must be clicked. The node can then be selected using check boxes.



## 6.9. MIGRATE CONCEPTS

In older Docusnap versions the concepts were stored in a stored path in the file system. If you want to store these concepts in the database, you must migrate the old concepts. You can also do this using the Other tab and the Migrate Concept button. For this the path to the old concept files must be specified.

## 7. CONCEPT TEMPLATES

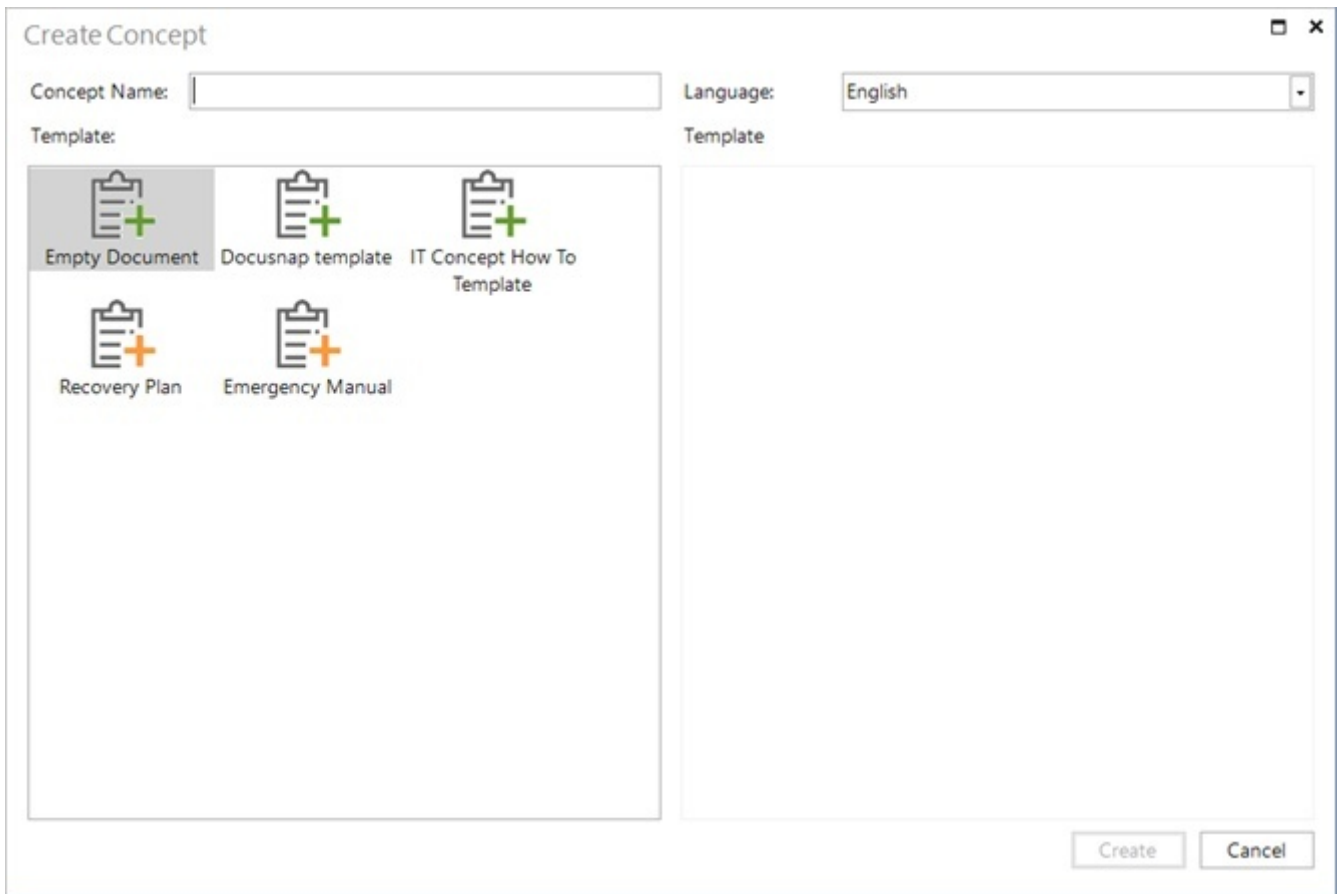
The first point of contact with IT concept templates is when you create a new concept:

By default, the following templates are available here

- Recovery Plan
- Emergency Manual

(standard templates are marked orange). In the following screenshot you can also see templates created by the user (marked green).

In the standard templates, you will find ready-made structures that are intended to give you an idea of what content should be inserted into these concepts.



**Create Concept**

Concept Name:

Language:

Template:

  
Empty Document

  
Docusnap template

  
IT Concept How To  
Template

  
Recovery Plan

  
Emergency Manual

Create Cancel

A template can be created for several reasons:

- CI template with customized styles, headers, footers, and logos
- Template for a server file so that the documentation of a server always has the same structure.
- A customer-spanning basic documentation that is imported at the customer's site to automatically fill the customer-specific content (lists, reports, plans, etc.).
- Predefined structures on specific topics

The following elements within the IT concepts are relevant for creating a template:

- Style Sheets
- Table of Contents
- Headers and Footers
- Variables
- specific, dynamic content that can be used across multiple customers
- Placeholders

**Style sheets** were described in [chapter 3](#). They are used for formatting (font, font size, etc.) and should be adapted to the desired values at the beginning and saved as a template. You can customize style sheets with a right click - *Change*.

**Tables of Contents** are used for an overview in documents. The individual creation in each concept is omitted if it is included directly in the template. See [chapter 3](#) for more information.

**Headers and Footers** - see [chapter 3](#) for more information.

**Variables** were also described in [chapter 3](#). Variables such as the title, current page number, number of pages and creation and modification date are helpful when creating a template.

**Dynamic content** is interesting for system houses that can create basic documentation for customers without any further intervention by creating a concept. Which contents are offered here and where the restrictions are, can be found in [chapter 7.2.1](#).

**Placeholders** define selected content (reports, plans, prose texts, etc.) within a concept. For example, you could use a placeholder to define that the installed software of a system is to be included in the server file. Via the to-do list, you can fill the individual placeholders with content.

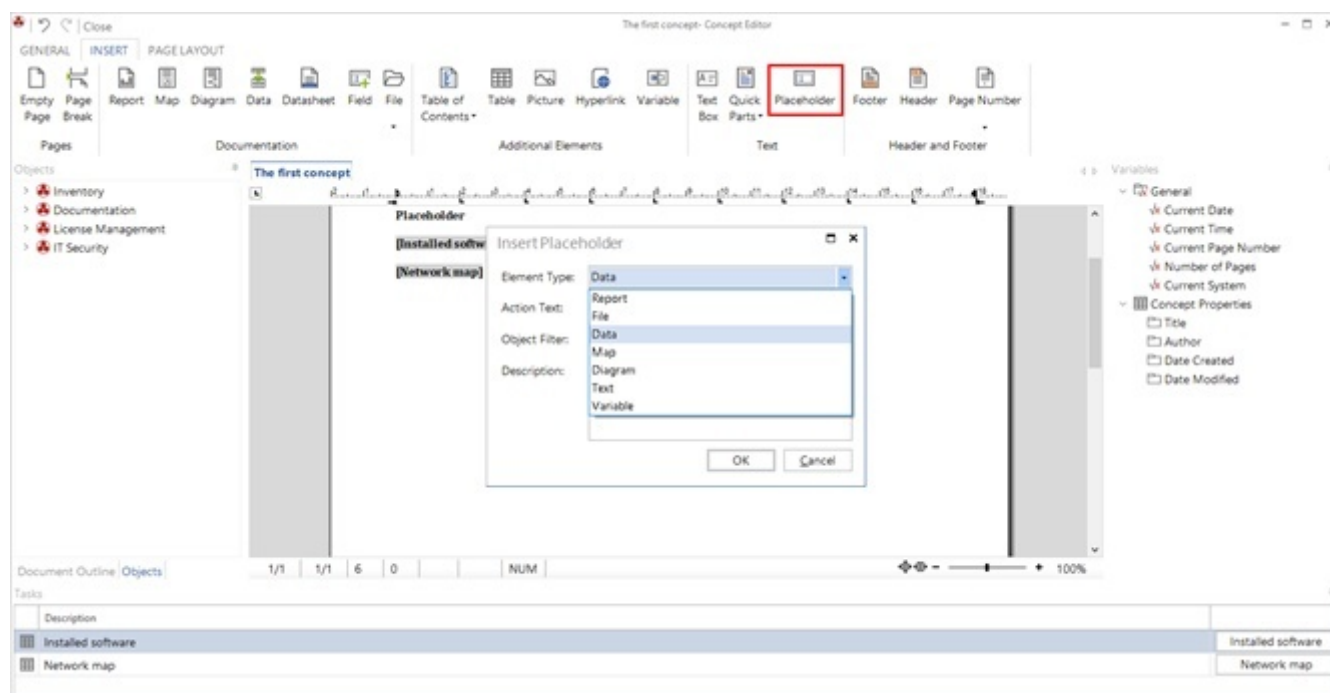
## 7.1. CREATE TEMPLATES

### 7.1.1. INSERT PLACEHOLDER

The following contents can be defined as placeholders:

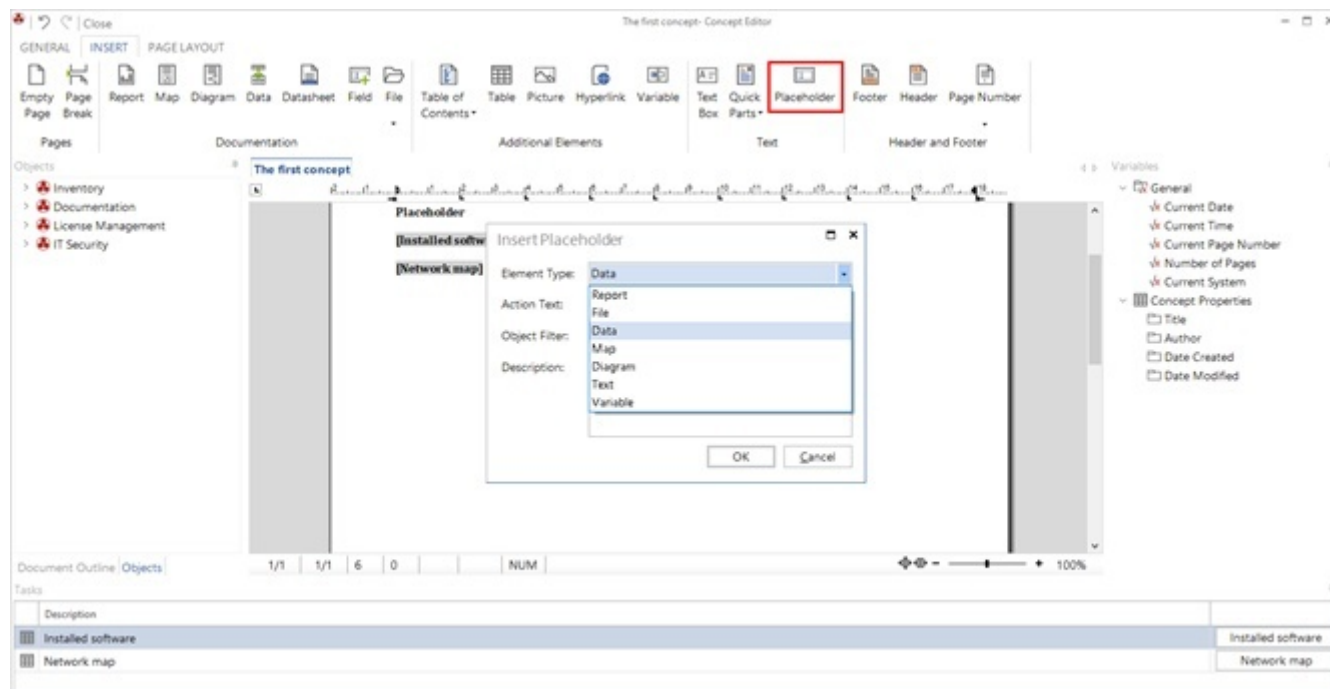
- Report
- File (dynamic)
- Data
- Map
- Diagram
- Text
- Variable

You can create a new placeholder via the **Insert - Placeholder** tab.

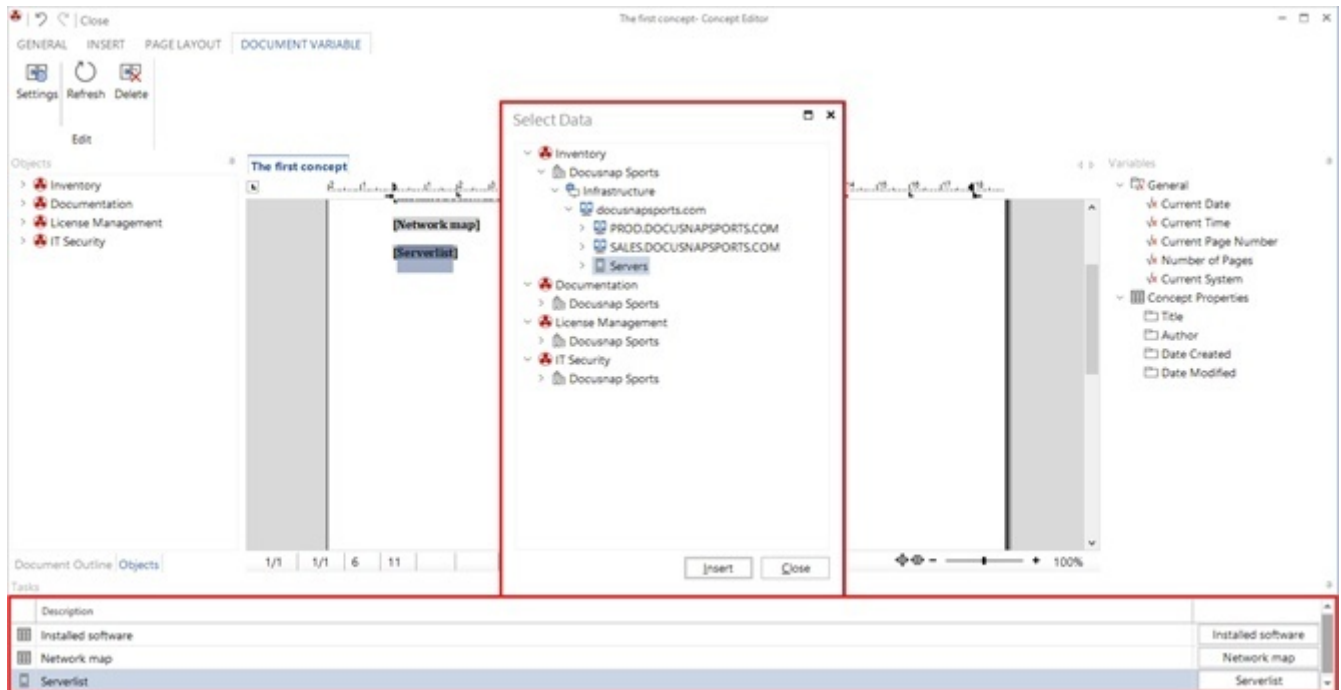


When creating the placeholder, you must enter information regarding an action text and description. This information will be available later in the task list.

An object filter is also required. Here you select which object from the data tree you want to store later in the concept. In the following example it is a list of the inventoried Windows servers.

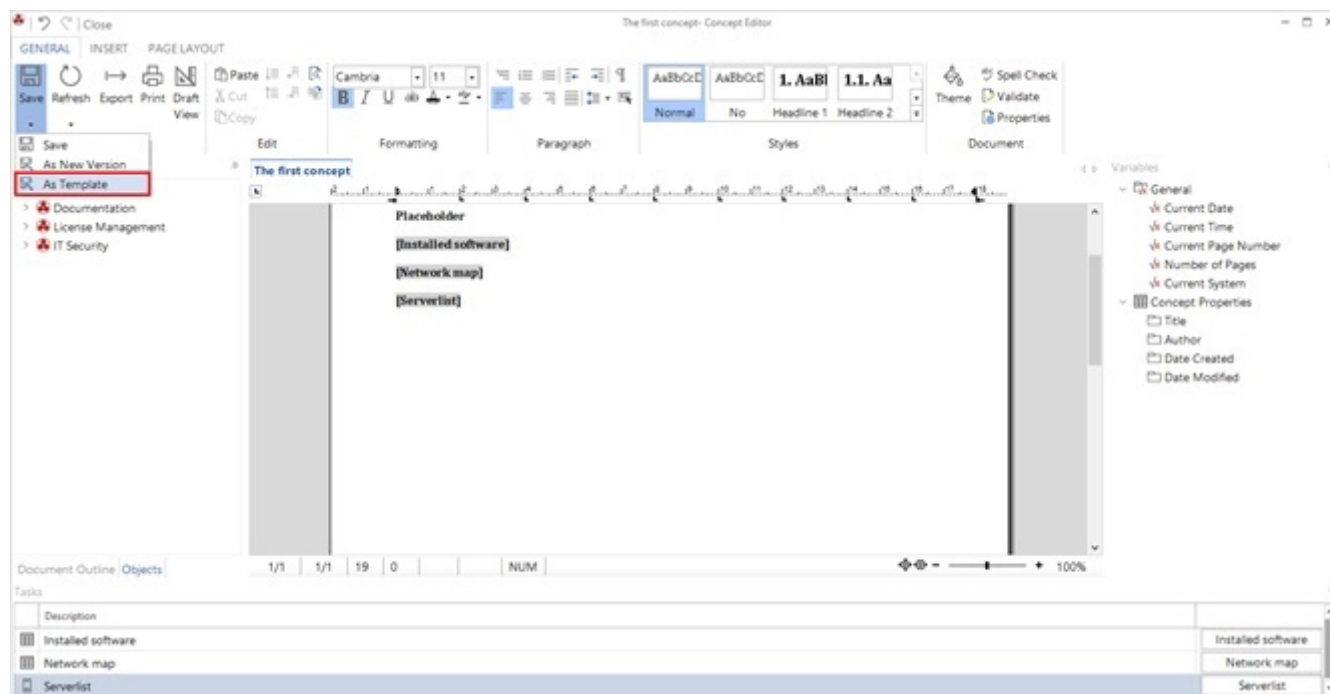


All placeholders stored in the concept can then be found within the task list. The task list displays the description and action text for a control. If you now select the control, a dialog box opens in which you can enter the selected content:



## 7.1.2. SAVE TEMPLATES

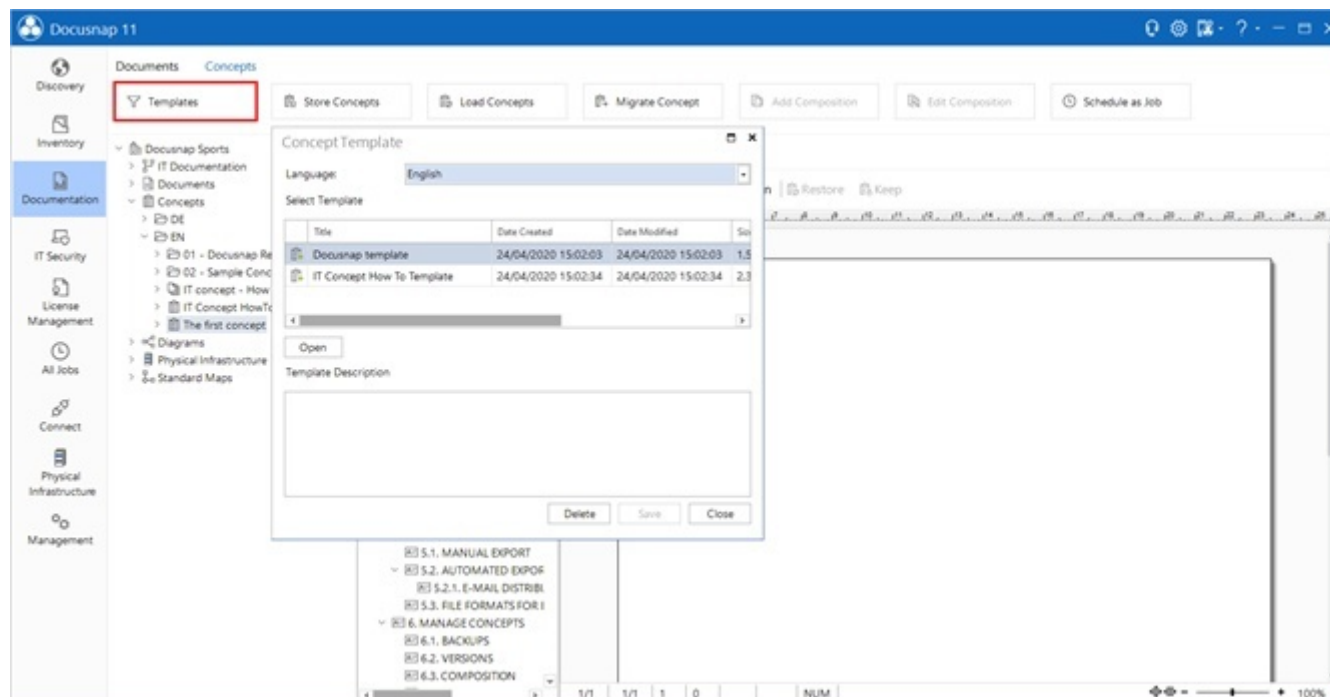
You can save a finished template in the tab **General - Save - Save as template**. You can then use this template when creating a new concept.



### 7.1.3. CUSTOMIZE / MANAGE TEMPLATES

If you want to adapt an existing template, you can do this in the **Concepts – Other - Templates** tab.

You will now be listed the templates you have created yourself. **Open** allows you to open the template, make adjustments, and overwrite the existing template or save it under a new name.



## 7.2. REUSE TEMPLATES

Templates are designed to reduce the amount of work required to create new documents.

Placeholders can be used to define concept contents.

Furthermore, you can already store data from the Docusnap database in the concept - for example, a list of all inventoried domain controllers:

| Name     | Type | Virtualized |
|----------|------|-------------|
| DOSPDC01 | DC   | Yes         |
| DOSPDC02 | DC   | Yes         |

This content can now be updated to your Docusnap environment. Right-click on the table above and select **Update**. The table will now show your inventoried domain controllers, if you look at this concept HowTo in Docusnap.

This way the concepts and templates are reusable - also in other Docusnap environments.

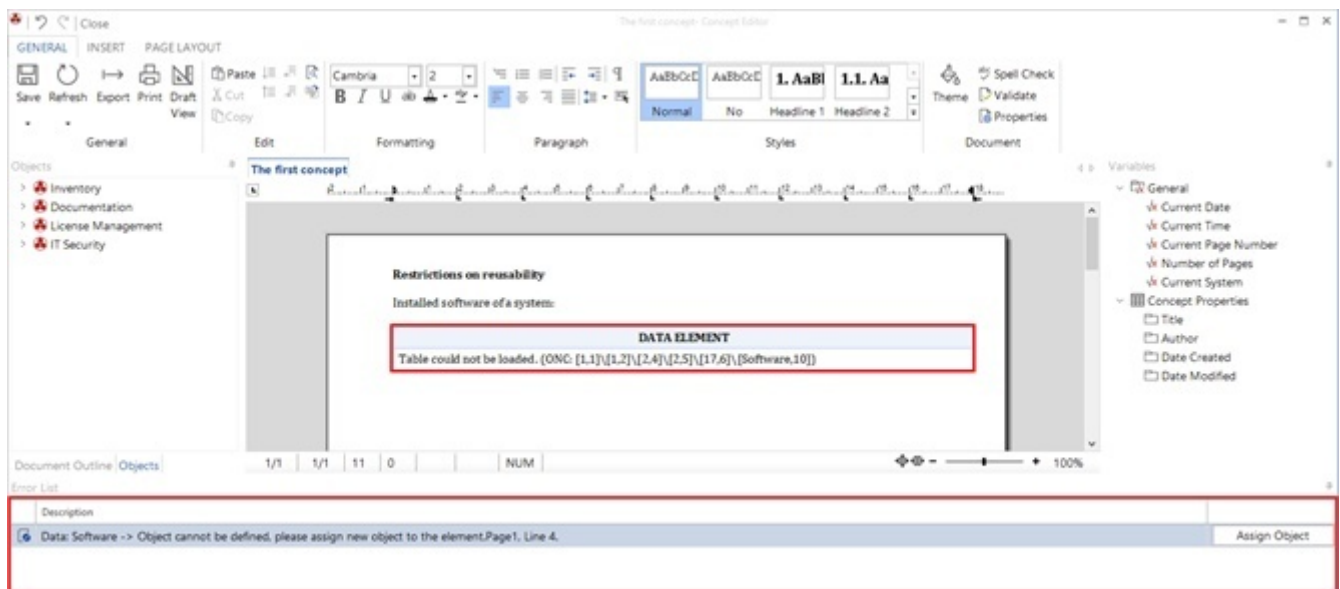
## 7.2.1. REUSABILITY RESTRICTIONS

[Chapter 6](#) describes how to save and load concepts and concept templates. If you load the concepts into another Docusnap environment, you can automatically adopt some of the content, as discussed earlier. However, this transfer of data has restrictions.

The contents of a concept can only be transferred up to a certain level of detail. Overview lists, such as inventoried servers, workstations, Linux and other systems, can be used very well. ADS users and group overviews as well.

However, if a specific object is stored - e.g. the name of a system, an ADS group or the group memberships of groups - no assignment can take place here.

Content that cannot be assigned is displayed with an error message and an entry in the error list:



The screenshot shows the Docusnap Concept Editor interface. The main window displays a document titled "The first concept" with a section titled "Restrictions on reusability". Under this section, there is a table with the following content:

| DATA ELEMENT                                                              |
|---------------------------------------------------------------------------|
| Table could not be loaded. (ONC: [1.1][1.2][2.4][2.5][17.6][Software,10]) |

The error message is highlighted with a red border. Below the main window, there is an "Error List" pane. It contains one entry:

| Description                                                                                          | Assign Object |
|------------------------------------------------------------------------------------------------------|---------------|
| Data: Software -> Object cannot be defined, please assign new object to the element, Page 1, Line 4. | Assign Object |