



## DocuSnap 14

*New features, changes, and upgrade of DocuSnap 14*

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## 1. Introduction

The Docusnap 14 release introduces some new features and changes to Docusnap. This document is intended to give you an overview of the new features and changes. It also describes how you can upgrade from Docusnap 13 to Docusnap 14.

### New System Requirements

- **With Docusnap 14, at least a Microsoft SQL Server 2016 (Express) SP 1 is required!**
- **In addition, the compatibility level of the Docusnap database must be set to at least "SQL Server 2016 (130)".**

**This can be configured using the SQL Management Studio:**

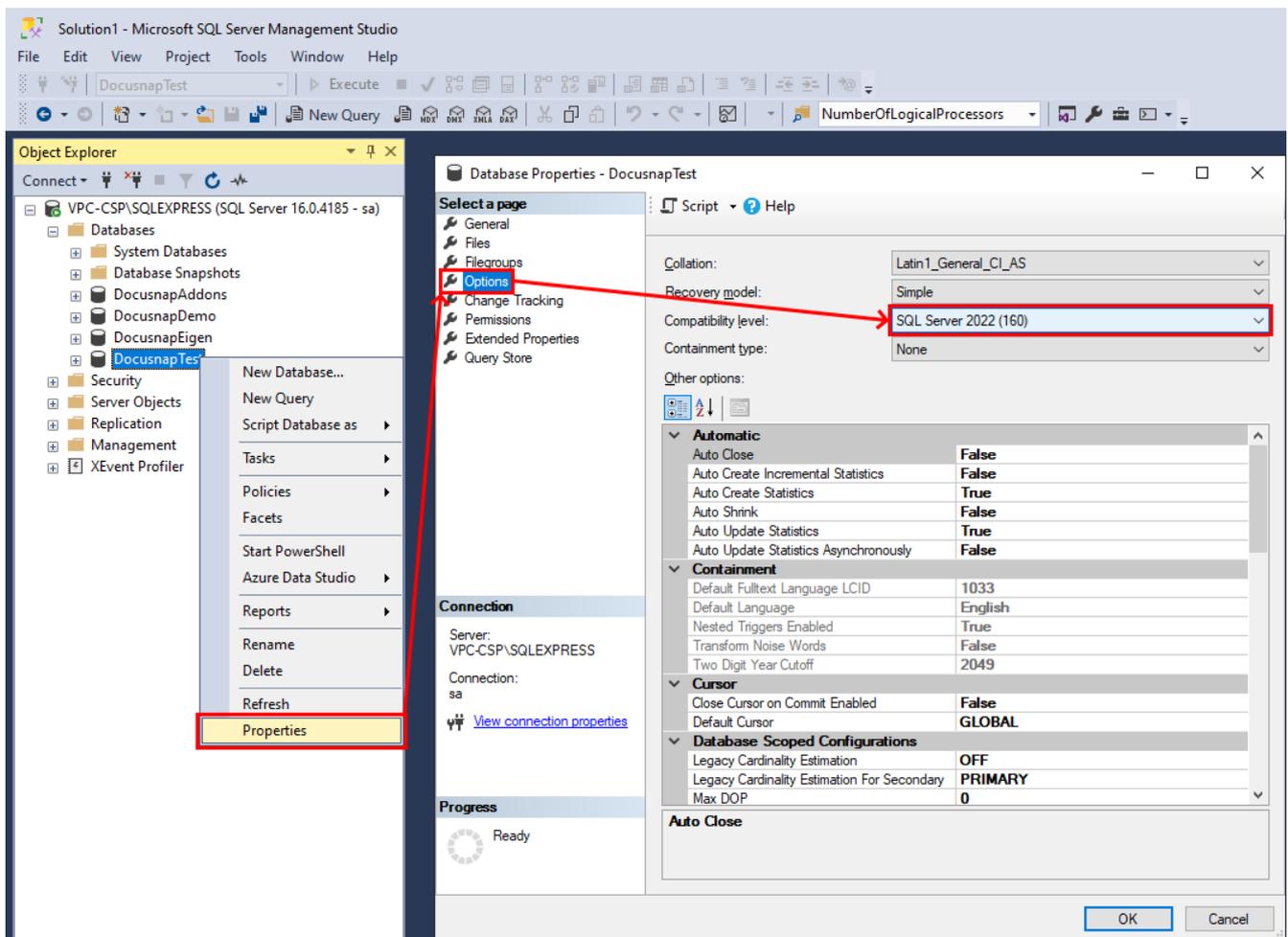


Abbildung 1 - Database compatibility level

## New Features

- Nutanix Inventory
- HPE-Storages 3PAR, Alletra und Primera
- Warranty queries from HP, HPE, IBM, Dell, Cisco, Asus, Lenovo, Toshiba, Fujitsu
- Docusnap Connect Export to Power Automate
- New UI Components
  - Performance improvements
  - New filter options

## Changes

- Microsoft365
  - Microsoft Intune
    - **Adaptation required!**
    - **Entra-ID-App must be updated!**
  - Mailbox permissions and public folders for Exchange Online
    - **Adaptation required!**
- Microsoft Azure
  - Analysis of role assignment and permissions
  - Revision of the tree structure
  - Expansion of inventoriable resources
  - **No customization required!**
- AWS
  - Inventory no longer dependent on the region, its done organization-wide now
  - **Additional policy is needed:**
    - AWSOrganisationsReadOnlyAccess
- Removal of legacy wizards

## Upgrade

1. Docusnap 12 or 13 is installed
2. Active service contract / rental available
3. Start the upgrade on the Docusnap server  
[Download the installation file](#) – execute it – perform the installation
4. Customize shortcuts with central configuration file when using the -UseConfig startup parameter
5. Program path to the Docusnap.exe is now ...\\Docusnap 14\\...
6. Perform database updateCheck beforehand when the last database backup was performed!
7. Replacing Used Script Files / Adjusting the Share Path
8. Check the status and plugin versions of the DDS
9. Updating Docusnap Client Systems

## 2. Perform upgrade

To upgrade to Docusnap 14 for free, an active service or rental contract is required! Existing activation keys remain valid. [Here you can download Docusnap 14](#)

You can upgrade to Docusnap 14 from the current version, Docusnap 12.

### 1. Start the upgrade on the server

The first step is to start the upgrade on the Docusnap server. To do this, download the setup file from the homepage and perform the installation.

### 2. Customize Central Configuration File (-UseConfig)

If you are using a central configuration file that uses the -UseConfig parameter in the desktop shortcut, it will need to be customized. In the shortcut, adjust the paths for Target and Run in - Docusnap 13 becomes Docusnap 14.

Tip: When adjusting the %ProgramData%\Docusnap\DocusnapSettings.xml, the above path adjustment will not be necessary in the future. This variant is preferred. For more information, see the [Installation and Configuration HowTo in Chapter 4](#).

### 3. Check/perform database backup

Before you perform the database upgrade, you should perform a database backup if you haven't already done so.

### 4. Perform a database upgrade

When you start Docusnap after upgrading, Docusnap will prompt you to update the database. If there is still an active connection to the Docusnap database, this will be displayed. Close all Docusnap client applications and then perform the database upgrade. The upgrade on the Docusnap Server is complete.

### 5. Replace Used Script Files / Adjust Share Path

If you perform inventories with one of the script variants, you must now replace them in their storage location. This replacement should be done after each update/upgrade of Docusnap.

If you have not saved the script files in a central location, but have shared the Tools folder directly, you will need to adjust the share accordingly.

When using one of the script variants, we generally recommend installing a Docusnap Discovery Service (DDS) at least on the system on which the Docusnap Server has been configured.

In the DDS settings, you can specify an additional directory for storing the inventory modules (script files). This means that the script files are automatically exchanged when Docusnap is updated and are therefore always up-to-date.

Install and configure the DDS – [HowTo](#).

[Here you will find a HowTo](#) that shows how to set up script-based inventory using Windows as an example.

## 6. Check the status and plugin versions of the DDS

As part of the upgrade, you should check the plugin versions or the status of the DDS. Please note that it may take up to two hours to update the DDS. This depends on the bandwidth and its utilization.

## 7. Update of Docusnap client systems

Now you can upgrade to the rest of the client systems. When Docusnap is started there, the message that an update is available automatically appears. -> Proceed as described!

### 3. Nutanix Inventory

The Nutanix Inventory Wizard expects to specify the Nutanix cluster(s) with a user who has View permissions for each cluster.

Alternatively, you can use the Start Search button to query Prism-Central. The clusters specified there are then automatically entered into the wizard. The user used in this case must have view permissions on all clusters.

You get the view permissions for the user if you do not assign them a role (e.g. User Admin, Cluster Admin, Backup Admin).

The inventory is done via the manufacturer API and uses the following main query:

- <https://NutanixCluster:9440/PrismGateway/services/rest/v2.0/cluster>

A script-based inventory is also possible. At least the following parameters are required for this

- -t Name/IP of Nutanix Clusters
- -u User
- -p Password

## 4. HPE-Storages 3PAR, Alletra und Primera

The Storage Inventory Wizard expects the storage endpoint to be specified with a user who has read privileges (Browse role).

The following ports are used by default for the storage:

- 3PAR – 8080
- Alletra und Primera - 443

A script-based inventory is also possible. At least the following parameters are required for this

- -t Name/IP of storage
- -u User
- -p Password

## 5. Warranty enquiries

With Docusnap 14, the warranty data for Windows systems from the following manufacturers will be queried:

- Asus
- Cisco
- Dell
- Fujitsu
- HP
- IBM
- Lenovo
- Toshiba

### How does the query work?

1. Performing Windows Inventory
  - a. Remotely via Docusnap Server, Docusnap Discovery Service or Docusnap Client
  - b. Script-based via the Discovery-Windows.exe
2. Windows inventory data is stored to the database
3. Warranty query is started as a background job
  - a. Warranty query is started for **ALL systems without warranty information**
  - b. Warranty query is repeated monthly for all systems whose warranty expires in the next 6 months
  - c. **Warranty query can take a few minutes / hours, depending on the manufacturer**
  - d. **Warranty query, may be limited by the manufacturer depending on the size**

The procedure is repeated after each Windows inventory.

### Who performs the query?

- In the case of time-controlled inventories, the Docusnap Server service performs the warranty query
  - The Windows service is run by the local system account or by the service user
- In the case of interactive inventory via the Docusnap Client, the warranty query is executed by the user who started the Docusnap Client
  - From the system from which you started the Docusnap Client.

### Which endpoint is used for the query?

- <https://docusnap365.com/api/ds-dispatcher>
  - The warranty query is made via the Docusnap365 environment
  - No data is stored permanently, only transformed and forwarded to the manufacturer's endpoints

## 6. Docusnap Connect Export to Power Automate

Docusnap Connect packages can now be exported to the cloud automation platform Power Automate with Docusnap 14.

For export, the wizard expects the following information:

- Entra-ID-App
- Environment URL

If you have set up a Microsoft365 and/or Azure inventory, then Docusnap already has an Entra-ID app that you can use here. If you have not yet set up an Entra-ID app, you can do so in

- Docusnap Administration – Inventory – Entra-ID-App registrations.

You can find the **environment URL** in the **Power Platform admin center**. Here you can set up an existing or a new **environment**.

In the selected environment, the Entra-ID app is authorized with the **System Customizer** role.

- Settings – Users + Permissions – Application Users – New App User

General information on how to create Docusnap Connect packages can be found in the **HowTo**.

## 7. Microsoft 365 - Intune

As part of the Microsoft365 inventory, your devices managed in Intune are now also inventoried.

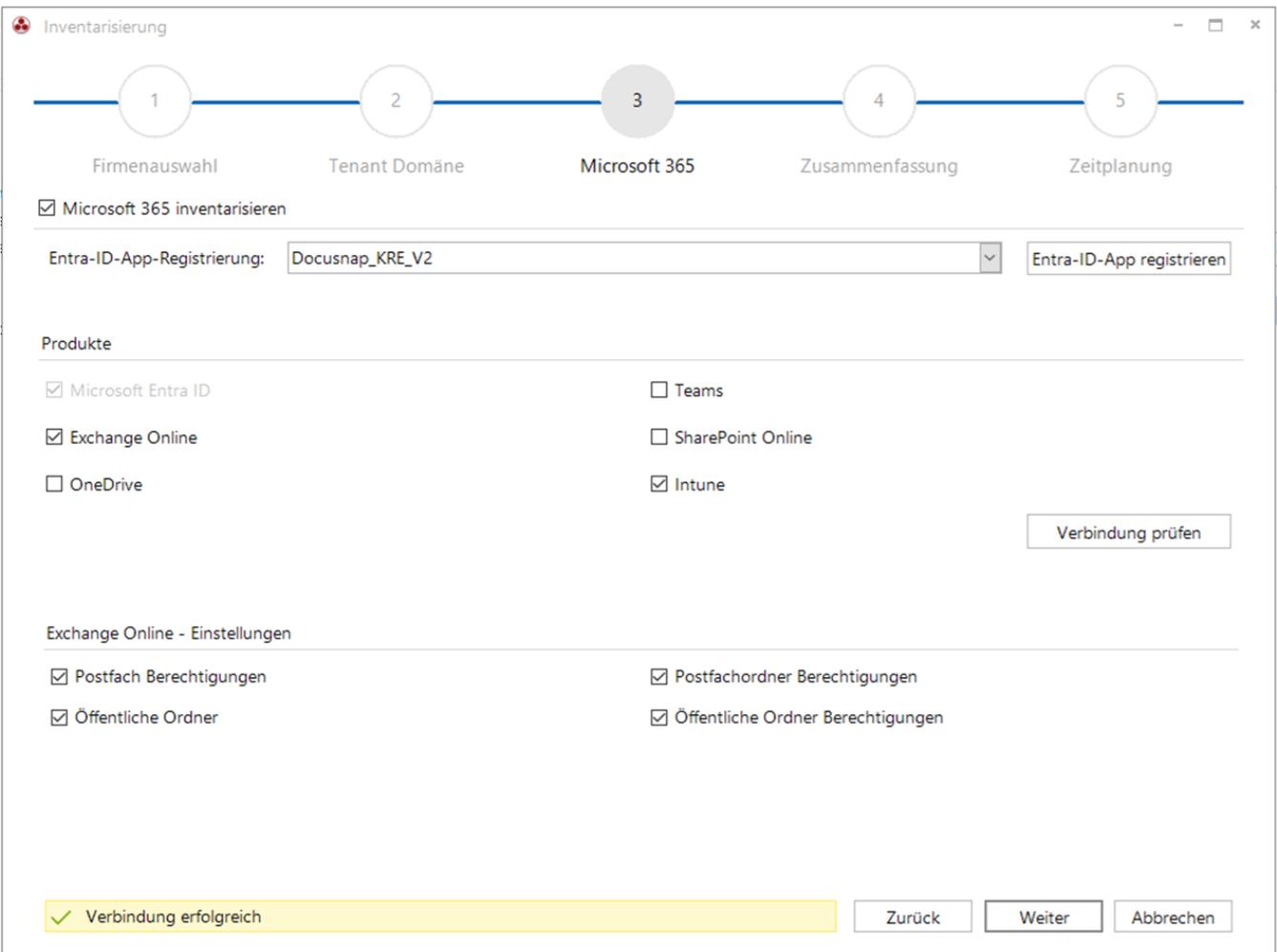
The prerequisites for Microsoft365 inventory do not change.

For Intune to be inventoried, the Entra ID app used must be updated! Additional permission for Intune are required.

- Register Entra ID app - Select registered Entra ID app - Update app reg.

An overview of all permission can be found here: [Azure Apps Permissions | Docusnap Documentation | Docusnap Docs](#)

You'll need to edit your existing order in the Discovery pane and enable Intune inventory.



Inventarisierung

1 Firmenauswahl 2 Tenant Domäne 3 Microsoft 365 4 Zusammenfassung 5 Zeitplanung

Microsoft 365 inventarisieren

Entra-ID-App-Registrierung: Docusnap\_KRE\_V2

Produkte

Microsoft Entra ID  Teams  
 Exchange Online  SharePoint Online  
 OneDrive  Intune

Exchange Online - Einstellungen

Postfach Berechtigungen  Postfachordner Berechtigungen  
 Öffentliche Ordner  Öffentliche Ordner Berechtigungen

✓ Verbindung erfolgreich

Abbildung 2 - Intune Inventarisierung aktivieren

## 8. Microsoft 365 – Exchange Online Extension

As part of the Microsoft 365 inventory, the

- Mailbox permissions
- Mailbox folder permissions
- Public folders and
- Public folder permissions

Be inventoried.

The prerequisites for Microsoft365 inventory do not change.

You must edit your existing order in the Discovery area and set the desired Exchange Online settings there. See Figure 1.

The extension allows you to remove your standalone Exchange Online job, if any, and delete the inventoried data.

## 9. Microsoft Azure

As part of the Azure inventory, changes have been made to the presentation of the inventoried data. Grouping by resource type has been removed. The inventoried data is now categorized first by subscription and then by resource groups.

In addition, the inventory has been expanded to include role assignments. It is now possible to see who has which permissions through which role on which resources.

Another new feature is the ability to generate a dependency graph. This automatically displays the dependencies of the individual resources on each other.

The prerequisites for inventorying Azure have not changed. Also, the already planned inventory does not have to be adjusted.

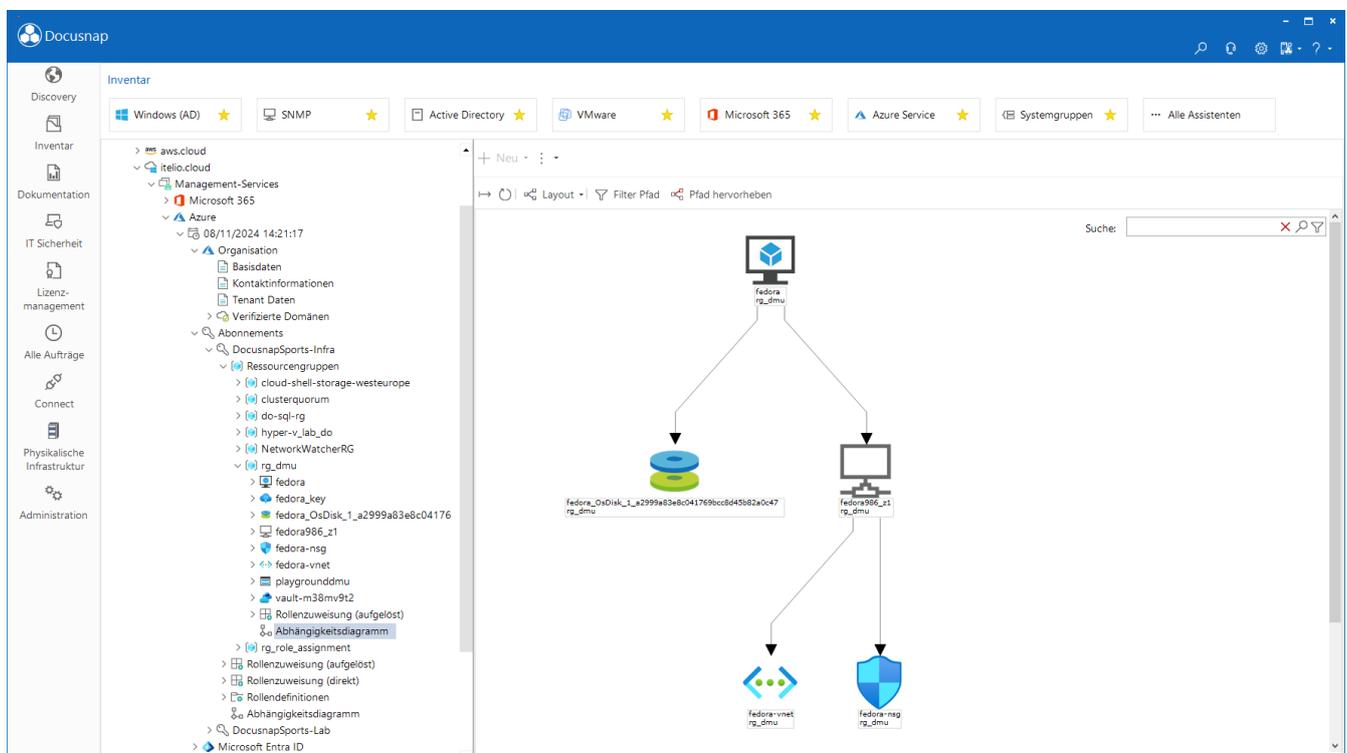


Abbildung 3 - Azure Abhängigkeitsdiagramm

## 10. AWS

For the AWS inventory, the following guidelines are always required, depending on the core areas / services to be inventoried:

- EC2
- IAM
- S3
- RDS
- Batch
- Lambda
- SQS

Regardless of the core areas, the following policy is now also required:

- `AWSOrganisationsReadOnlyAccess`

AWS inventory in Docusnap 14 is no longer performed per AWS Region, but across the entire organization. Therefore, the additional policy is now also needed.

# 11. New UI component

## 11.1 New filter options in the data areas

Docusnap 14 uses a new UI component. This component does not significantly change the appearance of Docusnap, but it does lead to changes in the filters in the data areas.

The icon in the filter area is striking. This will display the selected filter, and the Contains filter will now be used by default. This means that the wildcard \* no longer needs to be used when filtering, as it is inserted automatically.

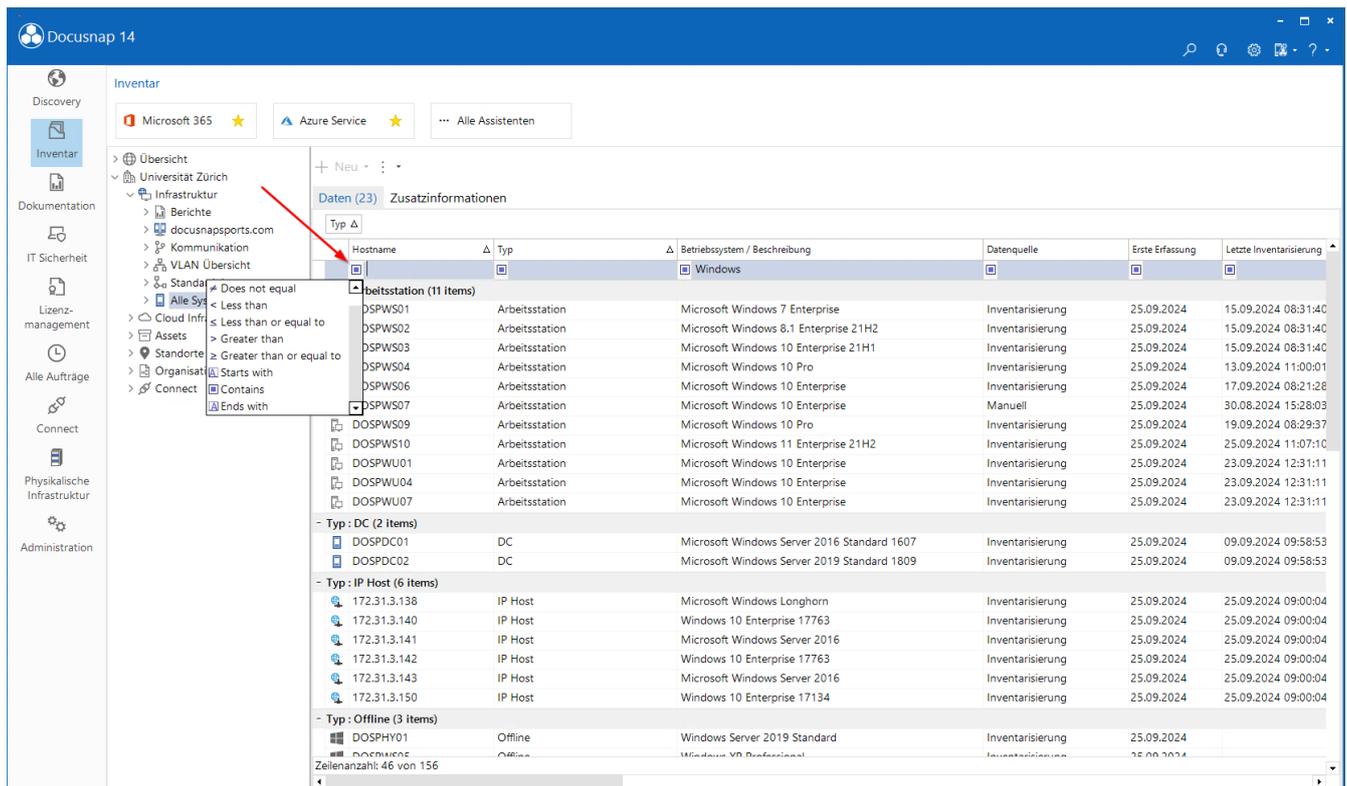


Abbildung 4 - Filter im Datenbereich

## 11.2 Removal of legacy wizards

As part of the UI update, the wizards previously labelled as 'Legacy' have been removed:

- Connect Legacy
- AWS Legacy
- Veeam Legacy
- Azure Service – Legacy
- Office 365 - Legacy

Existing jobs will remain functional, but new ones can no longer be created. It is recommended to use the new wizards, as they are not only officially supported, but also offer an optimised and revised inventory.

## VERSION HISTORY

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Date	Description
11/14/2024	HowTo created
12/10/2024	Version 1.1 - Requirements for Intune inventory extended
02/13/2025	Version 1.2 - Extension regarding remote legacy assistants
04/16/2025	Version 1.3 - System requirements extended (database compatibility level)
03/20/2026	Version 1.4 - Updating from version 11 is no longer possible

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