



Snapshot Partner Training

Although this training refers to Snapshot for Accounting, this manual can also be used for the Snapshot for Payroll version.

"It's ridiculously amazing, this Snapshot!"

Michael Young



"With Snapshot we were able to retrieve information we never dreamed we could get, all at the click of a button"

Sam Capuana



Plus Software has been shortened to Plus within this training manual

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Introduction

Snapshot is a Dashboard and Analytics Reporting Platform developed specifically for mid-market ERP Accounting and Payroll solutions.

Its purpose is simple - to give customers the right **real time information about any area of their business to help make informed decisions.**

This version of Snapshot (version 2) allows Partners to create their own Dashboards using this innovative Platform.

This manual will give a new Partner a guide to installing, using and creating their first Dashboard (for an existing or new Customer) using the Snapshot for Partners version.

Content to review beforehand

In order to progress to Creating New Dashboard for customers, you need to review the following

- Snapshot Installation Guide
- Getting Started Snapshot (Customers)
- Getting Started Customising Dashboards (Customers)

Please also view the Snapshot videos on the Snapshot or Plus Software Website.

Partner Skills needed

Partners wishing to create new Dashboards should have an understanding of the following:

1. Basic scripting to create views.

More advanced scripting understanding like stored procedures can also be useful.

2. An understanding of Dashboard components like graphs (axis and series), pivots, pie charts, etc.
3. An understanding of Parameters and how they can pass through into Queries. This will help in making Dashboards interactive and offer options on how to limit the data returned.

Installation/Setup of Customer & Partner Snapshot

The Installation Guide to Snapshot is on the Snapshot or Plus Software Website, on the downloads page.

For any assistance during your installation, please email support@PlusSoftSolutions.com.

IMPORTANT

*The installation of Snapshot for both the Partner and End User is exactly the same process - the licence code generated for each version is different, that is the Partner licence will unlock **additional** menu options and functionality.*

Technical Background

Data Sources explanation

A Data Source is where the data is being pulled from.

In most cases, this is your Business System.

Custom connection strings can be setup to pull data from other systems too.

A Data Source is made up of a provider (e.g. Microsoft SQL, Firebird, Access etc.), a Database and a Query (table, view or stored procedure).

You can currently connect to the following providers:

- Microsoft SQL Server
- MySQL Server
- Microsoft Access
- XML File
- Firebird
- Pervasive Database
- Oracle
- PostgreSQL Server
- SQLite Database
- DB2 Database
- Microsoft SQL Server CE
- InMemoryDataStore
- Advantage
- Asa
- Ase
- ODP
- VistaDB
- VistaDB5

When connecting a Dashboard to a Data source the default provider will be the Business System Database connected to Snapshot, e.g. Microsoft SQL Server or Firebird.

All the other providers listed above will require a custom connection string linked to the Dashboard.

Custom Connection Strings

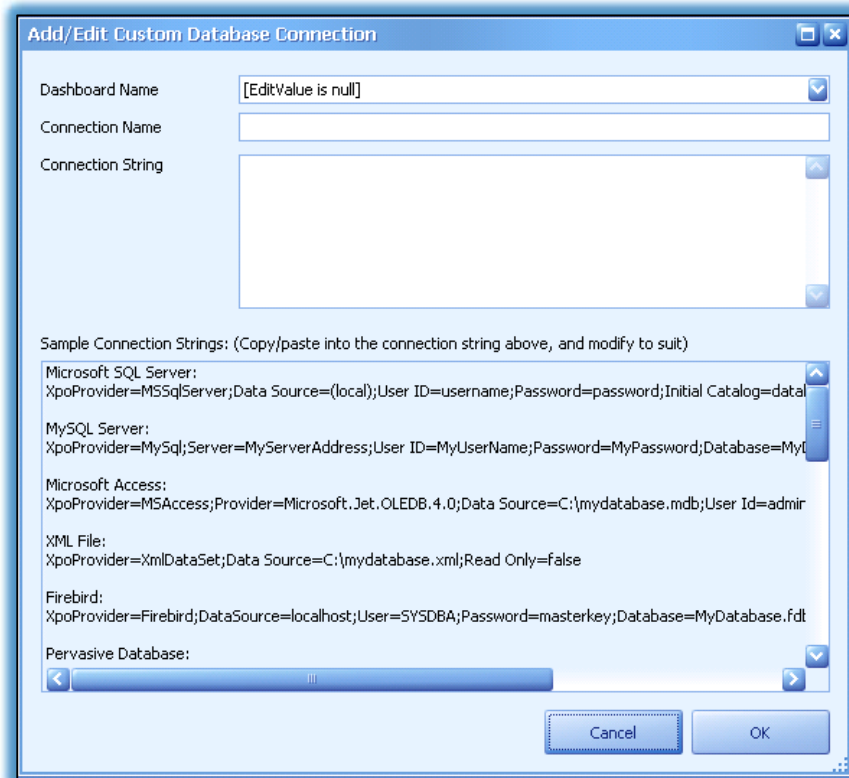
These are found on the Settings tab. Click the **Custom Connection Strings** icon:



When the below screen opens click **Add**:



The following screen will be displayed. Input the relevant information:



Dashboard Name: Select the Dashboard from the drop down list the connection string is going to be used with.

Connection Name: Give the connection a name.

Connection String: Copy in the appropriate connection string from the list provided and alter the string to connect.

Click **OK** when you are finished.

This will allow you to connect to a Database on another Data source or to another Database on the same Data Source, e.g. you can also connect to a Payroll or CRM database ***while Snapshot is linked to your Business Financial System.***

Data Preparation

If you are writing a Dashboard for a customer and the database is customised, e.g. additional fields / custom fields, custom views or functions etc. you will either need to:

1. Replicate these on your Database
2. Or get a copy of the customer's Database and restore it

This will allow you to create the Dashboard.

Make sure if using standard functions that they are available in your customer's version of the Database provider.

Database Updating

Snapshot has two (2) Databases.

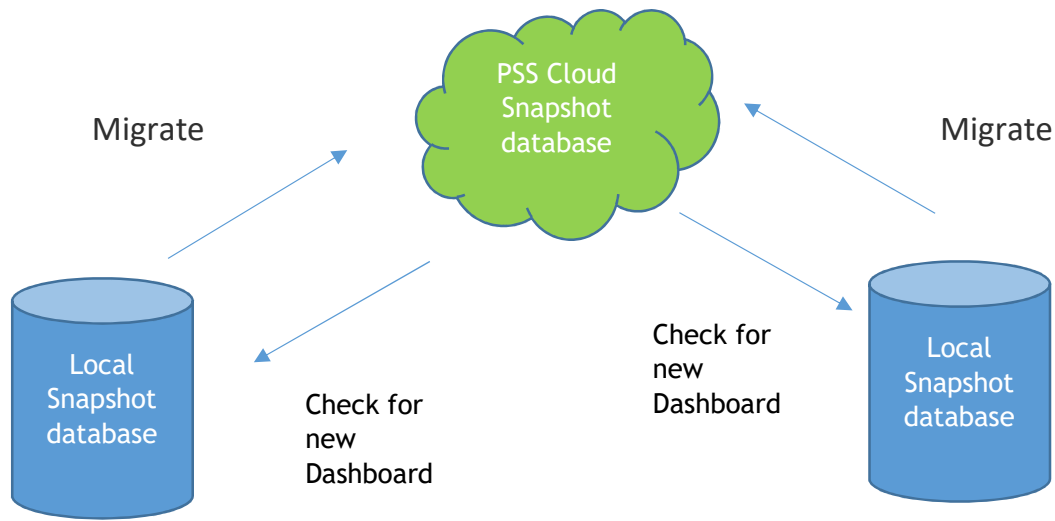
The Database on the Partner's end (this is the local Database that you and your customer has) and a Plus Software Solutions (PSS) Database on a cloud server.

The centralised point is the Database on the Snapshot cloud server.

This is where customers update and receive their Dashboards from.

Any additions, edits or deletions get migrated to the cloud server database and when the Check for New Dashboards icon is initiated (or the customer logs in) any changes to Dashboards are downloaded to the local Databases. This would include New Dashboards too.

As a result, there is always a backup of any Dashboard, view or stored procedure written in Snapshot.



How Dashboards Work in Snapshot

Views and Stored Procedures

Behind every Dashboard is a view or stored procedure, saved within Snapshot and version controlled.

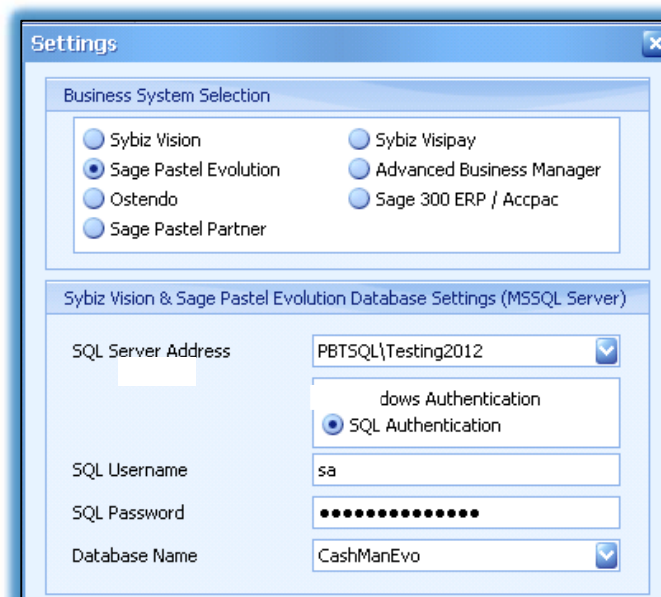
There can be multiple views or stored procedures linked to a Dashboard.

Views and stored procedures are version controlled to the specific versions of the Business System as over time column names or tables may change in the Database.

This way specific queries are written to accommodate the versions of the various Business Systems. This also means the Dashboard does not need to be updated and the process is seamless.

We will be discussing view and stored procedure creation later in this manual.

Irrespective of what Database or Business System type is used to create the Dashboard it always uses the Business System and database you have initially setup on the **Settings** tab under **Update Business System Database Connection**:



How Custom Dashboards work in Snapshot

Custom Dashboards are linked to specific customers.

Note that **only that particular customer gets that Custom Dashboard.**

When the icon **Check for new Dashboards** is clicked on (under Settings) Snapshot follows a number of steps:

1. It first looks to download the Dashboard
2. If it's a Community Dashboard it goes to the next step
3. If it's a Custom Dashboard it checks the customer and then looks at the views and or the stored procedures linked to the Dashboard
4. If the view or stored procedure is compatible with the business system version the Dashboard gets imported.

IMPORTANT:

If an end user (customer) does not have a specific Dashboard, check that the view has been added to their Business System Database.

It could be that there is a version issue or that the view may not be compatible with their Database. It could also be the version of SQL installed as not all inbuilt functions are available across all versions of SQL.

Views and Stored Procedures

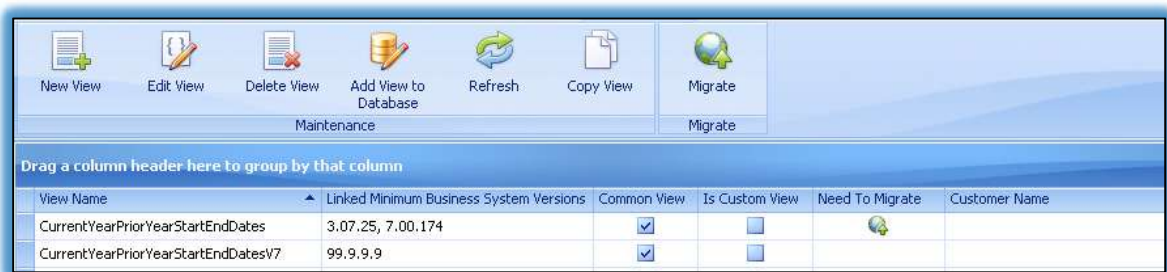
There should be at least one view and or stored procedure linked to a Dashboard.

You can have multiple views linked.

The query needs to be copied and pasted into Snapshot and can be written and tested in any tool that you use e.g. SQL Studio Manager.

You can copy the existing community views or stored procedures or you can create your own.

Let's look at the Database Views screen and discuss the Ribbon Bar:



New View

Click this to create a new view

Edit view

Click this to edit a custom view

Delete View

Click this to remove a custom view

Add View to Database

After you have added or edited a view. Click this to add the view to your Business System Database that your Snapshot is connected to. You will not be able to create the Dashboard without the view in the Database

Refresh

This just refreshes the screen

Copy View

Click this to make a copy of any existing view

Migrate

When you have finished creating, editing and proofing the view you need to click the Migrate button to migrate the view to our cloud server.
The customer can check for new Dashboards and it downloads the view for them and puts it on their Business System Database

Columns Explained:

View Name

The name given to the view. In the Business System Database, all the views are prefixed with pssSNAP

Linked Minimum Business System Versions

This displays which versions of the business system the view is compatible from or with

Common View

This shows if the view is a common view. You must select a view as being common if this view is going to be reference / used in another view

Is Custom View

These are custom view views - all others are community

Need to Migrate

If there is an icon then the view needs to be migrated to 'Go Live', to be added or edited in the cloud server Database

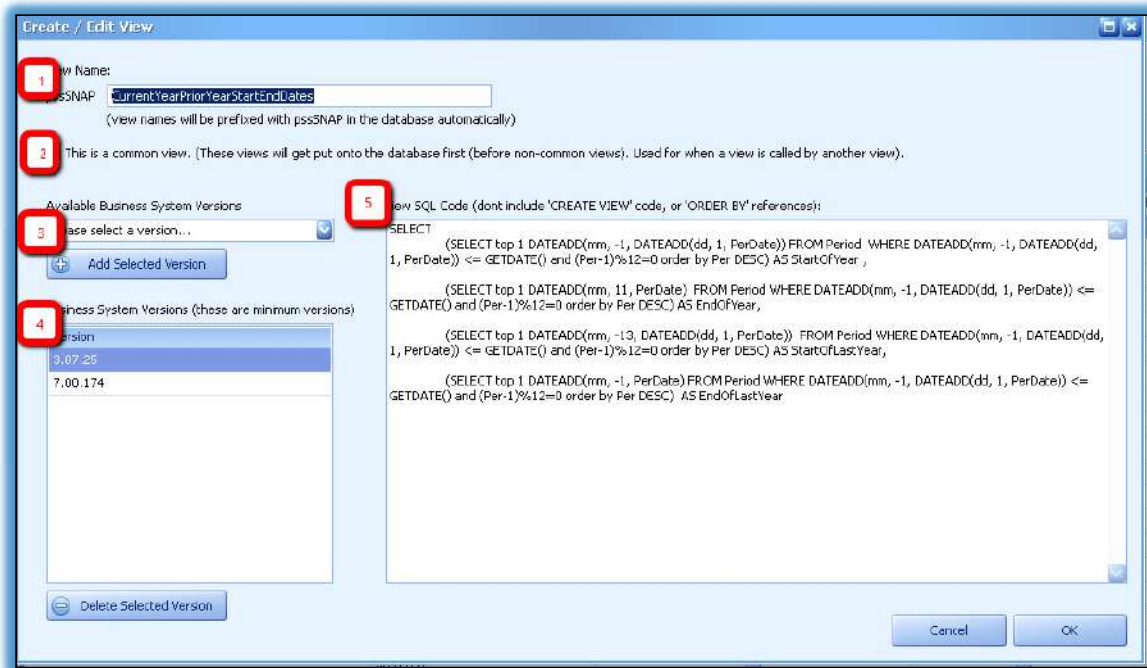
Customer Name

You can select the customer the view is written for

Note that this does not limit you only using this view for that customer, it's just a tag

Creating a View

Click on the **New View** button:



1. Give the view a name
2. Tick **This is Common** if the view is likely to be used in other views
3. Select the earliest version of the Business System that the query will work with. **In other words, the view will work from that version onwards.**
4. Then if there is a change in a version then you add in from which version the changed occurred and put in the query for that version. In the example above the first query will work from 3.07.25 to the version prior to 7.00.174. Then the next query will work from 7.00.174 onwards.
5. Copy the query into this space.

Stored procedures work exactly the same way.

Creating your first New Dashboard

Adding the new Dashboard

On the custom dashboard tab click on the **New Custom Dashboard** button in the ribbon bar:

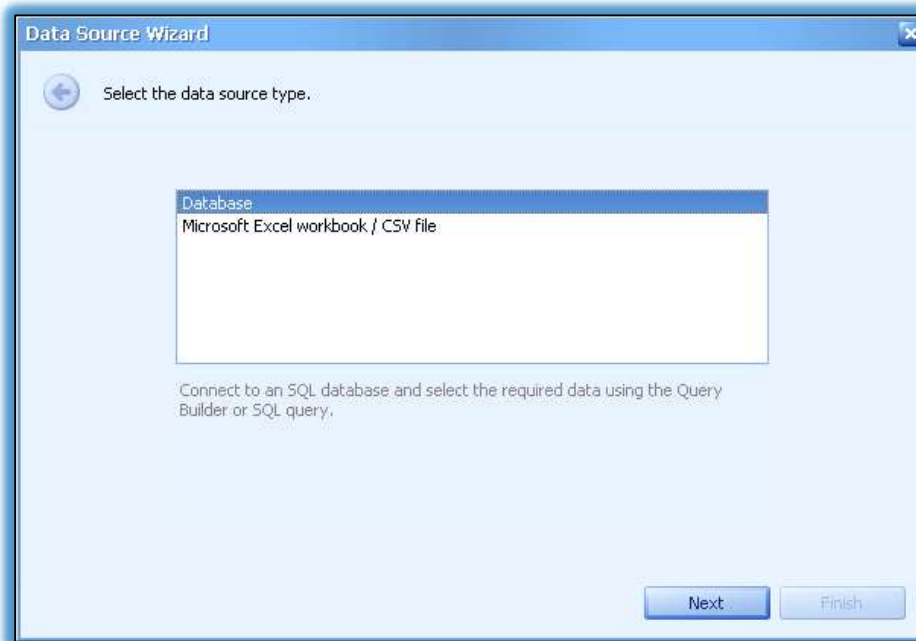


Linking the Dashboard to a Data Source and Query for creation purposes

In the Snapshot Dashboard Designer click on **New Data Source** on the Data Source tab:



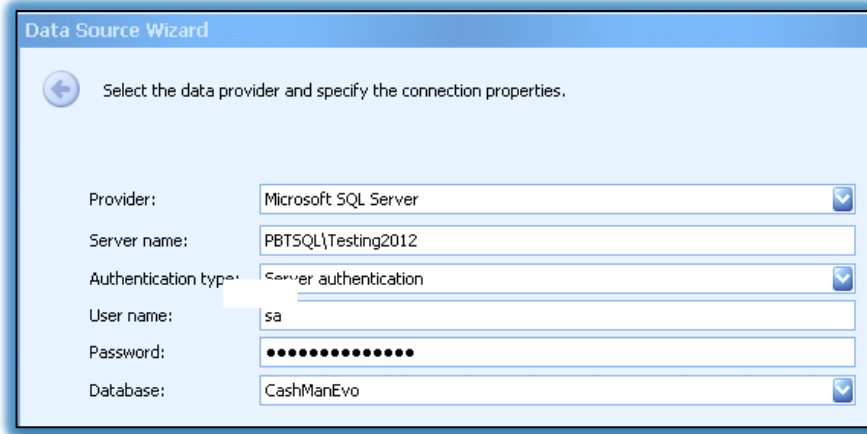
The following screen will come up giving you the option to either connect to a 'Database' or an 'Excel workbook / CSV'



'Database' option.

Depending on which Business System you are supporting you will have access to Microsoft SQL Server, Firebird or Custom Connection string (this is mentioned above in Data Sources explained) as a provider.

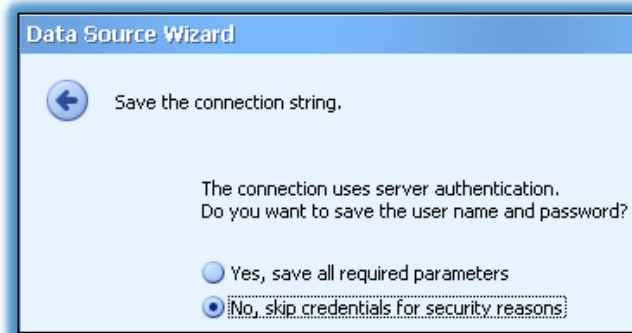
Enter in all your details to connect and select a Database to write the Dashboard on.



Note: It does not matter what Database or Business System you choose to write the Dashboard on.

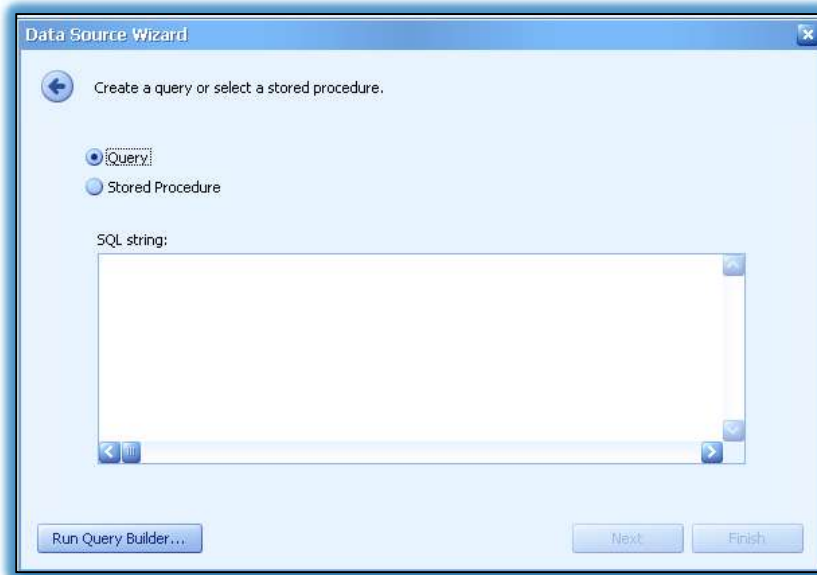
When running the Dashboard, it will always use the settings on the **Update Business System Database Connection**.

On the next screen select No:

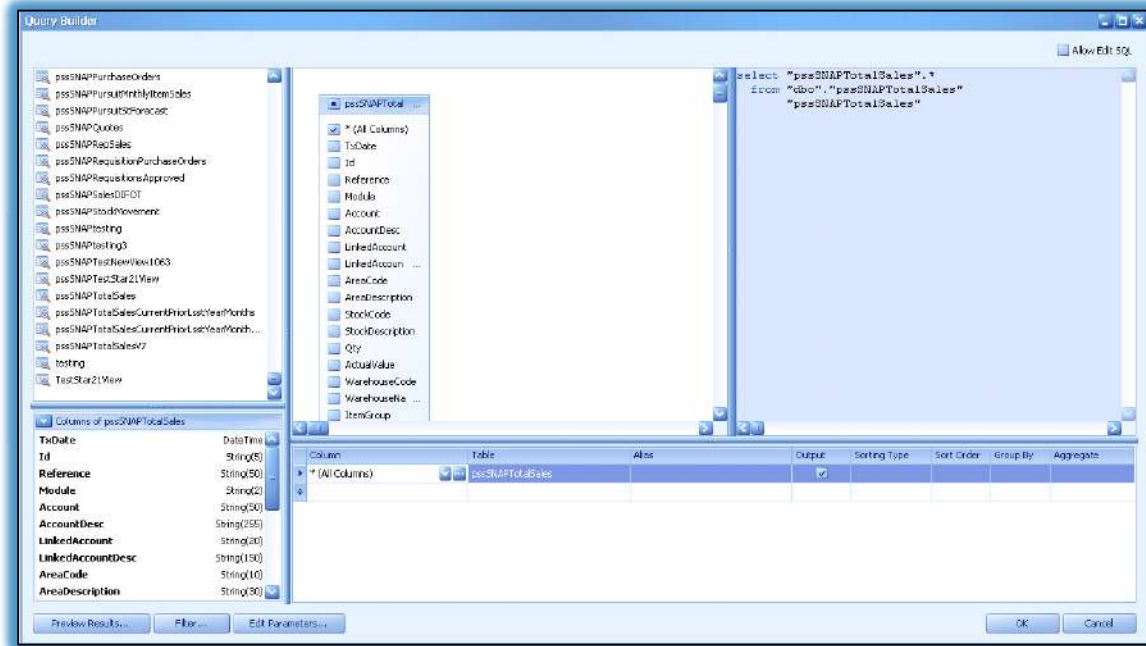


If you are using a view select **Query** and then **Run Query Builder**.

If you are going to use a stored procedure select **Stored Procedure**.



When using a view and selecting **Run Query Builder** you will see this screen:



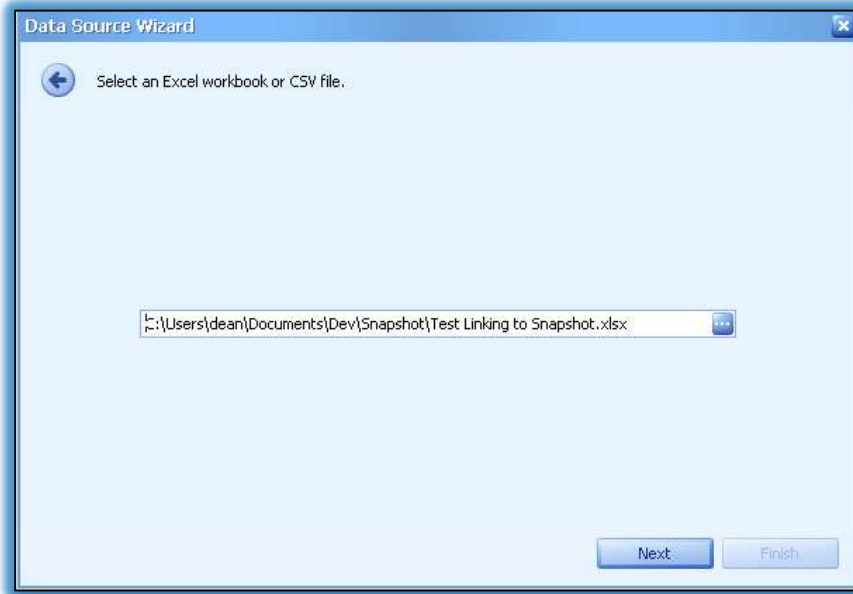
On the left-hand side, you will see a list of all the tables and views listed in your database.

While you can select any table or view and join these in here, we suggest getting used to just using your view created in Snapshot.

- Look for all the views starting with pssSNAP and then find the view you created or use an existing one.
- Once you have found the view you want to use, double click it and it will appear in the middle section.
- You will see it lists all the fields available in the view.
- We suggest selecting ***(All Columns)**. This way if you add a new field to your view it will automatically be added to the dashboard.

Click **Ok** and then Finish.

'Excel workbook / CSV' option
Browse for the file location.



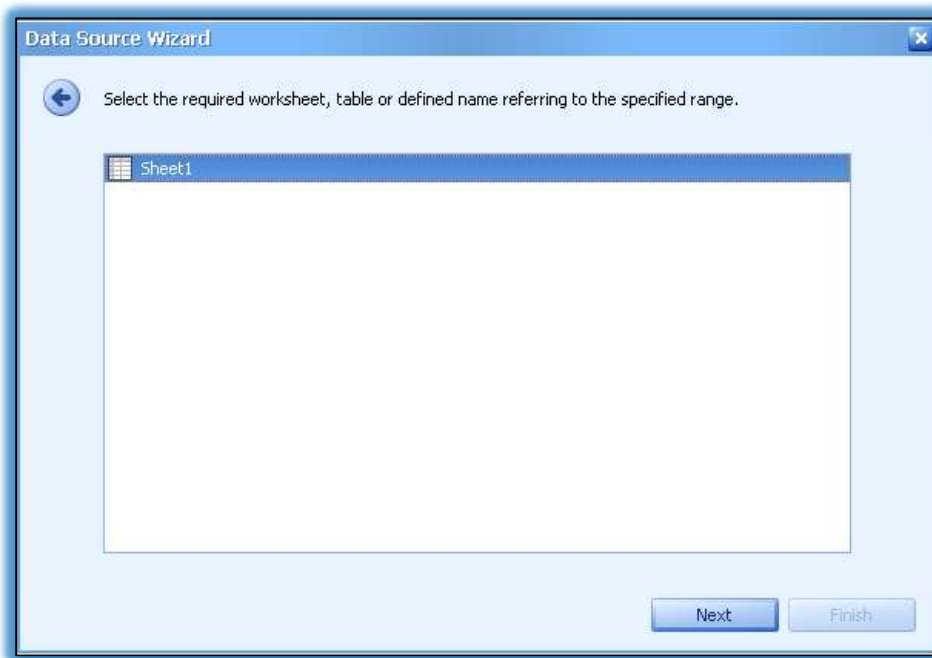
IMPORTANT:

When you have finished designing the dashboard you need to set this file location to where the customer is going to store the file and maintain the file. This cannot be updated by the customer version of Snapshot.

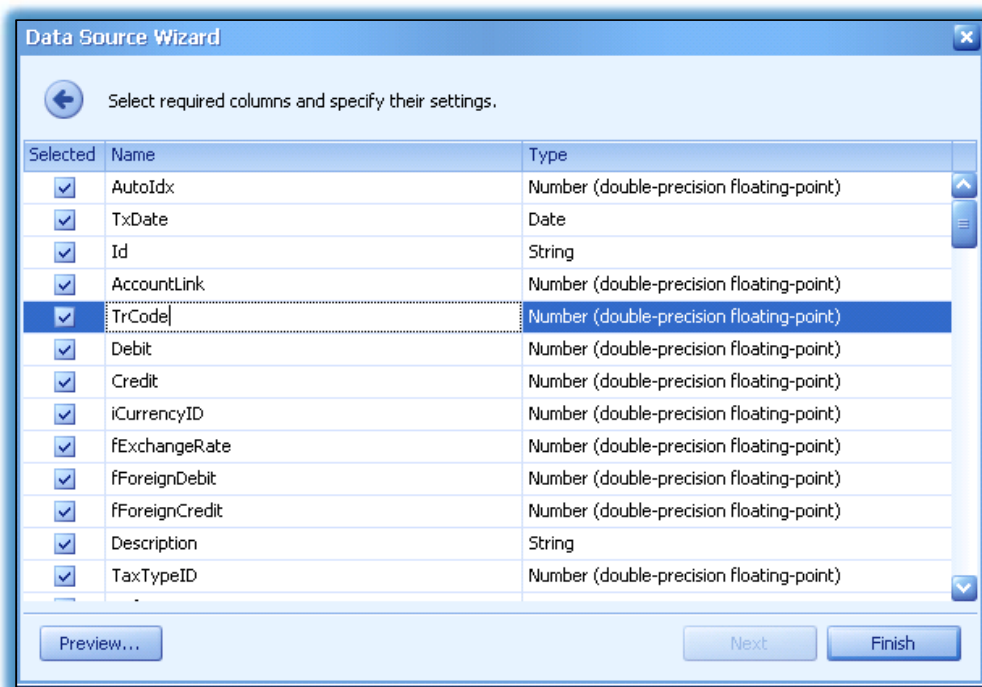
After clicking next you have the options to use the first row as column headers, skip empty rows, skip hidden rows and skip hidden columns.



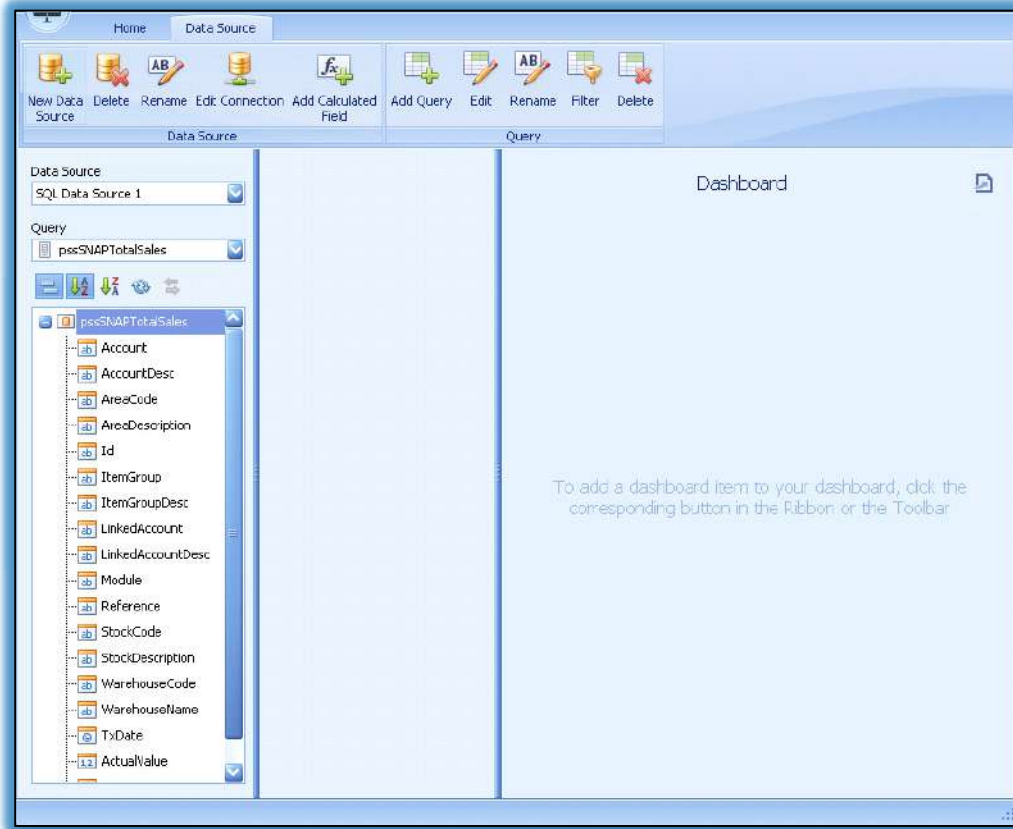
On this screen, you select which sheet to use.



The final screen, you get to set the data type for each column.



Now you have a blank Dashboard to start putting together. Congratulations!



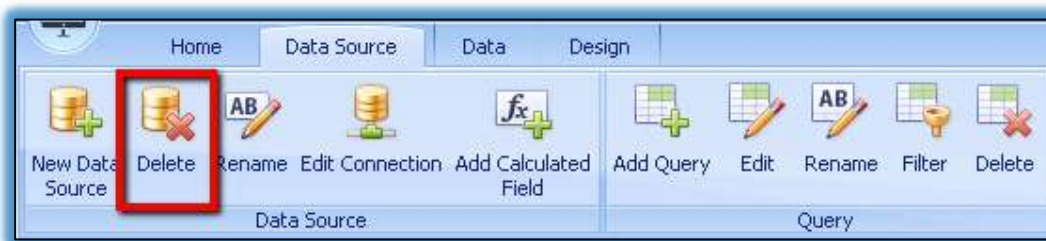
You can add multiple views or stored procedure to the same dashboard by clicking on 'Add Query'.

It then takes you through the same process as above.

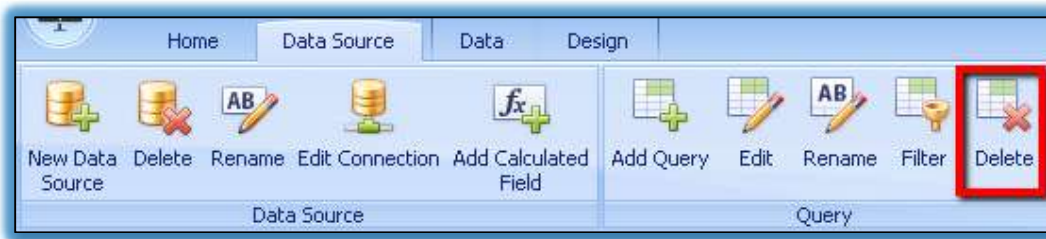
IMPORTANT:

There are two delete buttons in the Ribbon bar under Data Source:

1. The delete button located in the Data Source section will **delete your link to the Database** and the queries selected or created.



2. The delete button located in the Query section ***will only delete the view or stored procedure you selected from the Database.***



Parameters

Parameters can be added to the Dashboard to limit the data pulled from the Database using a combination of parameters and filters, on the query.

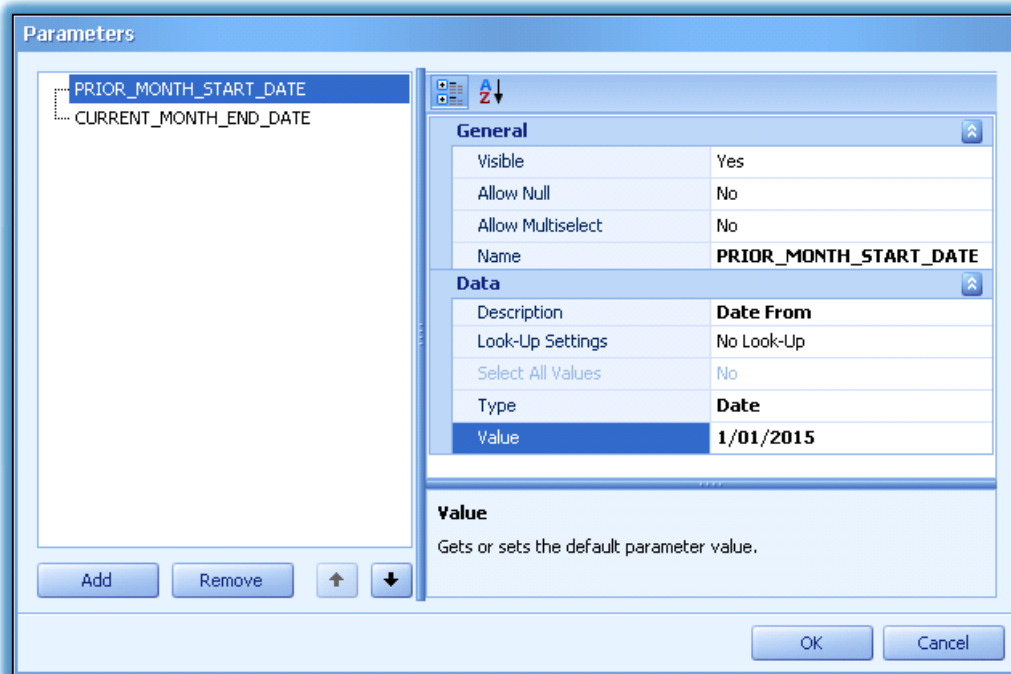
Parameters can also be used to make the Dashboard interactive. For example, you can add date parameters for a “to and from” date to limit the data between the two dates.

Alternatively, you could add in numeric value that can represent a percentage and then only display data where the figures are above or below the parameter value.

The parameters are found on the Home tab under the dashboard section:



The Parameter screen explained



Visible

This is a yes or no field and makes the parameter visible or not when running the dashboard.

Allow Null

This is a yes or no field and sets whether or not a null value can be passed as a parameter value

Allow Multiselect

This is a yes or no field and lets you either only select one value or multiple values. If multiselect is set to yes then it must be used with a filter operator of 'Is any of'

Name

This is the name of the parameter. it can't have any spaces and is used in the where clause of the query

Description

This what the user sees when running the Dashboard as the parameter name

Look-Up settings

There are 3 options, No Look-Up, Static List and Dynamic List:

- No Look-Up leaves the parameter blank and the user needs to type in a value;
- Static List - the user types in a list of options now when setting up the parameter for the user to select;
- Dynamic List - this list is linked to a table column in the Database and the list is populated based on what is in the table.

Select All Values

This is a yes or no field and sets whether or not all parameter values should be selected in the initial state of the Dashboard.

Type

This is type of parameter. These are the options:

- String
- Date
- Number (16 bit integer)
- Number (32 bit integer)
- Number (64 bit integer)
- Number (floating-point)
- Number (double-precision floating-point)
- Number (Decimal)
- Boolean
- Guid

Value

Default value that appears for this parameter when running the Dashboard

We have created a number of default date parameters which will dynamically set the dates when running the Dashboard.

Make the parameter name the same as the list below and it will work.

You can make the description whatever you like. It only defaults the correct date when running the Dashboard from the front and does not work when in the Dashboard Designer.

List of default date parameters:

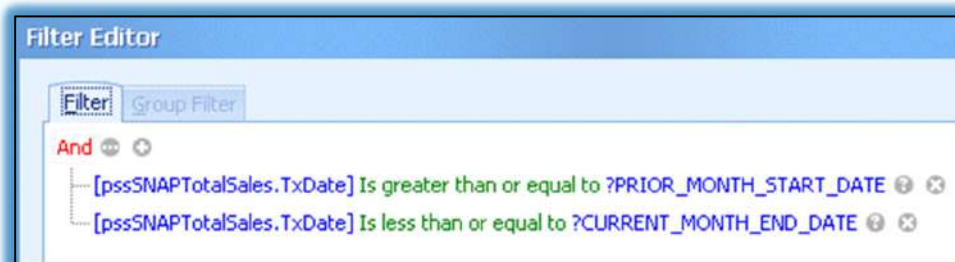
- CURRENT_DATE
- CURRENT_MONTH_START_DATE
- CURRENT_MONTH_END_DATE
- PRIOR_MONTH_START_DATE
- PRIOR_MONTH_END_DATE
- CURRENT_CALENDAR_YEAR_START_DATE
- CURRENT_CALENDAR_YEAR_END_DATE
- CURRENT_WEEK_START_DATE (date of Sunday)
- CURRENT_WEEK_END_DATE (date of Saturday)
- CURRENT_WORK_WEEK_START_DATE (date of Monday)
- CURRENT_WORK_WEEK_END_DATE (date of Friday)

Linking the parameter to a data source filter

Click the Filter button on the Data Source tab:



Below is an example of linking two date parameters to date fields in the Database. This will limit the data returned between these two dates:



When a parameter has been added to a Dashboard you should see at the top right of the Dashboard the parameter icon is now visible and you can click it to set parameters:



Snapshot user passing a value through to a parameter to limit data

You can assign a parameter to a user in Snapshot and set a value.

This will then pass the value through to the parameter in the Dashboard therefore limiting the data that the user can see.

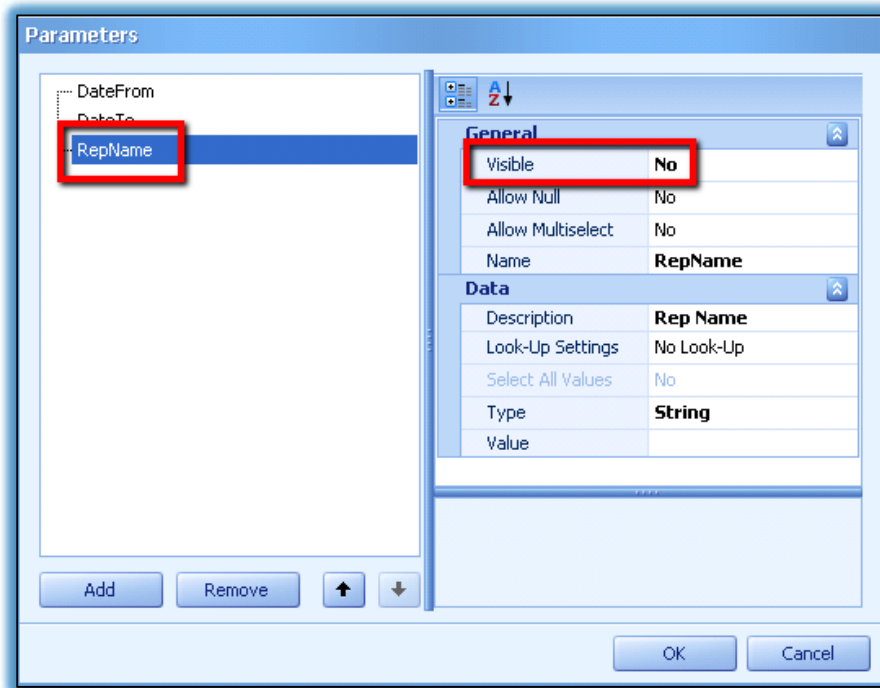
For example, sales reps may be setup in Snapshot and you can set it so that each rep accesses the same Dashboard but they only see **their** data.

Or using the web version of Snapshot you can create a Dashboard that your customer's customer get access to, you would setup a user in Snapshot for the customer and have a parameter linked to the customer and set the customer's customer code as the parameter value.

This is then passed to the Dashboard and they only see their information.

Firstly, you need to setup the parameter in the Dashboard and set the 'Visible' value to NO.

This stops the user from being able to change the value as they won't see the parameter when running the Dashboard.



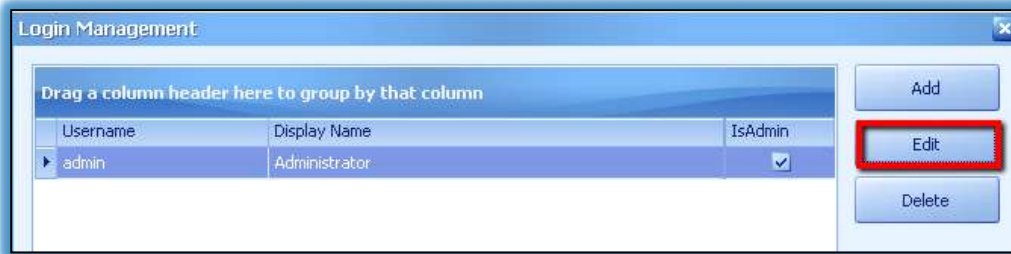
Then link the parameter to a data source filter as explained above.

Then save and close the Dashboard.

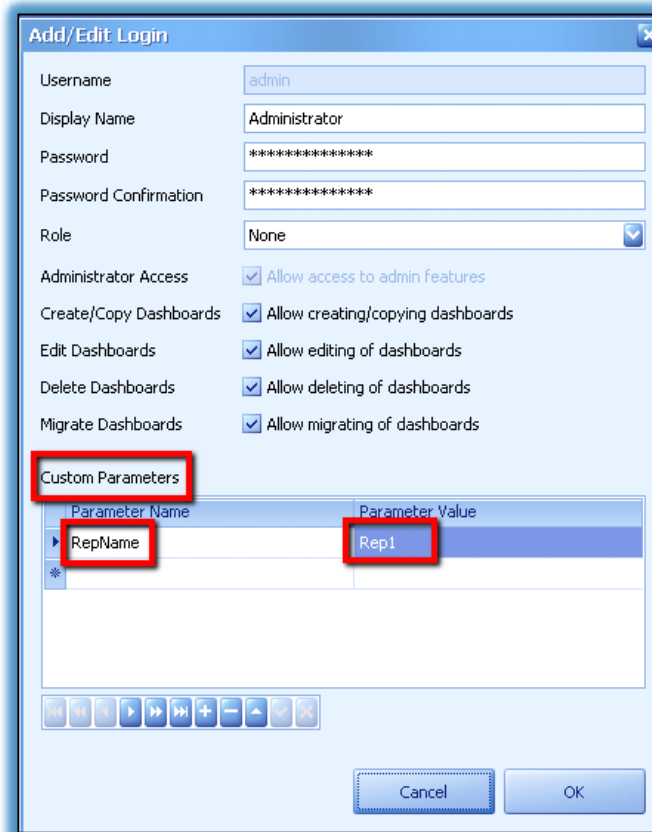
Go to the Settings tab and select Manage Logins:



Click the Edit button for the user you want to add the parameter to:



In the Custom Parameter section add in the parameter name exactly how it is in the Dashboard and then assign the value it needs to pass to the parameter:



This will limit the information this user see when running a Dashboard with this parameter used.

Saving the dashboard

There are two options when saving a Dashboards, **Save** and **Save As**:



Save As This will save the Dashboard in XML format to your desired location. This is the same as exporting a Dashboard. It does **NOT** save the Dashboard in Snapshot

Save This saves your Dashboard in Snapshot

Naming and Linking (to Customer) & Linking to Views or Stored Procedures

Close the Dashboard after saving by clicking the **cross (X)** at the top right corner:



After closing you will get the following screen where you name the Dashboard, link to a customer and link the view and or stored procedure.

The screenshot shows the 'Save Dashboard' dialog box with the following fields and options:

- Dashboard Name:** 1. A text field containing 'Sales History Trends - All Sales All Time All Products - Video Dash'.
- Custom Dashboard Customer:** 3. A dropdown menu showing 'Progressive Business Technologies-Partner'.
- Dashboard Description:** 2. A text area containing 'This analytics shows a graphical view of Sales History for all time by Month. It can be filtered by customer and inventory item, showing Customer buying trends and Inventory buying trends.'
- Dashboard Category:** 4. A dropdown menu showing 'Sales'.
- Views:**
 - Available Views:** 5. A list box containing 'CustomerAging', 'CurrentYearPriorYearStartEndDatesV7', 'CurrentYearPriorYearStartEndDates', 'ComApRepSalesCrossApply', and 'ComApRepSales'. 'CurrentYearPriorYearStartEndDates' is selected.
 - Required Views:** A list box containing 'TotalSales' and 'CurrentYearPriorYearStartEndDates'.
 - Buttons: '+ Add as required view' and '- Remove as required view'.
- Stored Procedures:**
 - Available Stored Procedures:** 6. A list box with a header 'Stored Procedure Name' and an empty list.
 - Required Stored Procedures:** A list box with a header 'Stored Procedure Name' and an empty list.
 - Buttons: '+ Add as required stored proc' and '- Remove as required'.

At the bottom, there are buttons for 'Edit Dashboard Layout', 'Cancel', and 'OK'.

1. Give the Dashboard a meaningful name
2. Enter a longer description of the Dashboard
3. Link the Dashboard to one of your customers
4. Select a category under which the Dashboard will appear
5. Select the view/s used in the Dashboard if applicable
6. Select stored procedure/s used in the Dashboard

Click **Ok** when finished.

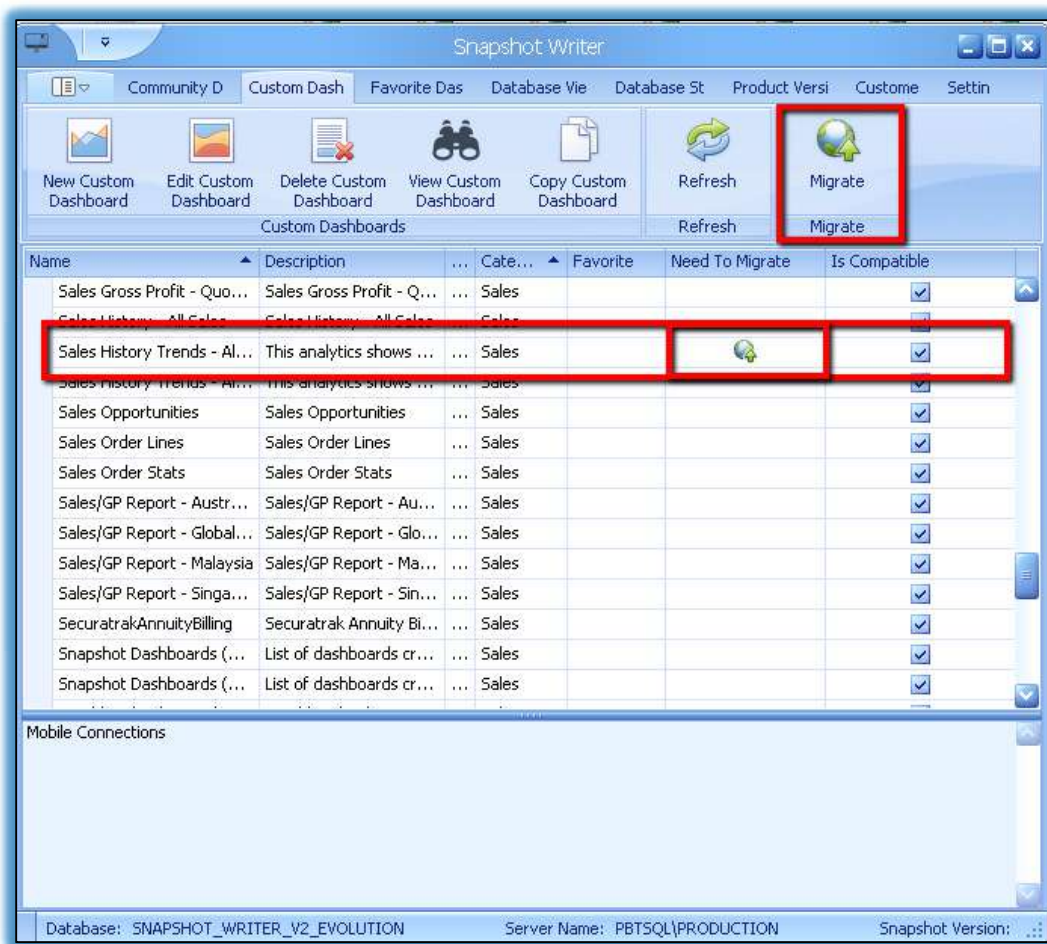
Migrating your Dashboard to the Customer

Once you have completed the Dashboard, you are ready for your customer to receive the Dashboard.

You now need to **Migrate** this Dashboard for the customer to be able to view the Dashboard.

Steps:

1. Highlight the Dashboard
2. Click on the **Migrate** button in the ribbon bar.
3. You will also notice in the columns next to your Dashboard name that the **Need To Migrate** column will have an icon in it. This means the new Dashboard needs to be migrated or there has been a change made and it needs to be migrated for the change.



Partner FAQ's

Why is there no Dashboard in the list?

Check to see if the view or stored procedure linked to the Dashboard has been entered on the customer's Business System Database.

There are no View or Stored Procedure on the Business System Database

Check that the versioning of the view or stored procedure is compatible with the customer Business System.

Check to see if the query used in the view or stored procedure will run on their Database (e.g. using SQL studio manager).

Sometime different versions of SQL cause issues with specific functions used.

Partner Support

Email any queries to support@PlusSoftSolutions.com

Before contacting us please make sure the view or stored procedure behind the Dashboard runs on the customer's Database and that they are version controlled correctly in Snapshot.

If there is still a problem, then email us the problem with

1. The Business System name
2. The view or stored procedure
3. Exactly what is happening.

If this view or stored procedure is specific to the customer's Database due to additional fields and other customisations then we may need to arrange either a copy of the Database or remote access.

Notes page

Scribble and doodle on this page if your trainer bores you. 😊

Thank you for using Snapshot.

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