



## SnapShot Installation Guide

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# Minimum Requirements

## Supported Operating Systems

The following Operating Systems are supported by SnapShot

- Windows XP SP3
- Windows Server 2003 SP2
- Windows Vista SP1 or later
- Windows 7
- Windows 8
- Windows 10
- Windows Server 2008
- Windows Server 2008 R2
- Windows Server 2012
- Windows Server 2012 R2
- Windows Server 2016

## Other requirements

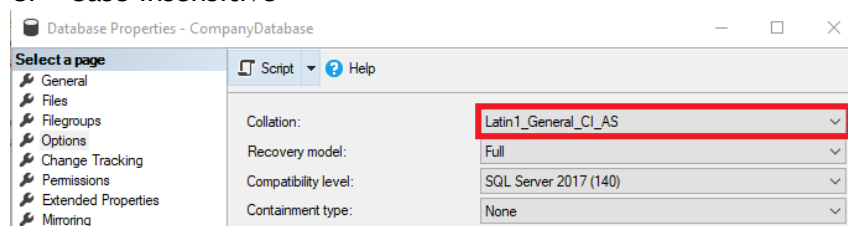
The following is a list of other requirements required for SnapShot to run

- Windows Installer 3.1 or later
- Microsoft .NET Framework 4.0 or later
- Microsoft SQL Server 2012 or later + login credentials
- Valid SnapShot licence file
- Rights to install software
- Access to:  
<https://webservice.plussoftware.com.au/ReportingAppWebSvc/ReportingAppWebService.aspx>
- A Supported Business System:
  - Advanced Business Manager
  - Ostendo
  - Sage Pastel Evolution
  - Sybiz Vision.Net
  - Sybiz Visipay
  - Sage 300
- Company databases running on Microsoft SQL cannot have a Case Sensitive collation set. This is a setting against the database and can be checked using Microsoft SQL Management Studio
  - Launch Microsoft SQL Management Studio and connect to the instance where the company database is hosted
  - Right click the company database and select **Properties**
  - Navigate to the **Options** menu and check the **Collation** setting
  - A collation with **CS** in the name is Case Sensitive and cannot be used
  - A collation with **BIN** in the name is Case Sensitive and cannot be used.

Some examples of Case Sensitive Collations are:


- Latin1\_General\_CS\_AS
- Latin1\_General\_BIN

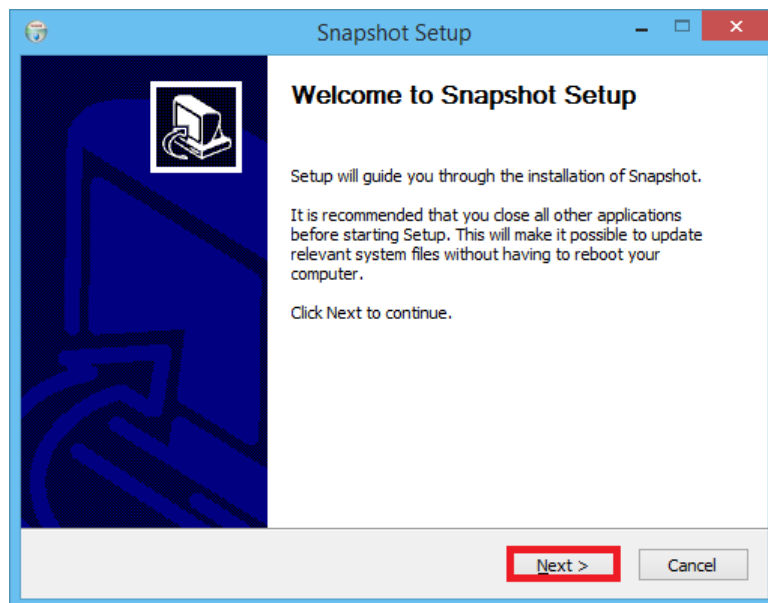
Below is a screenshot of the collation being set as a compatible collation. Note: CI = Case Insensitive



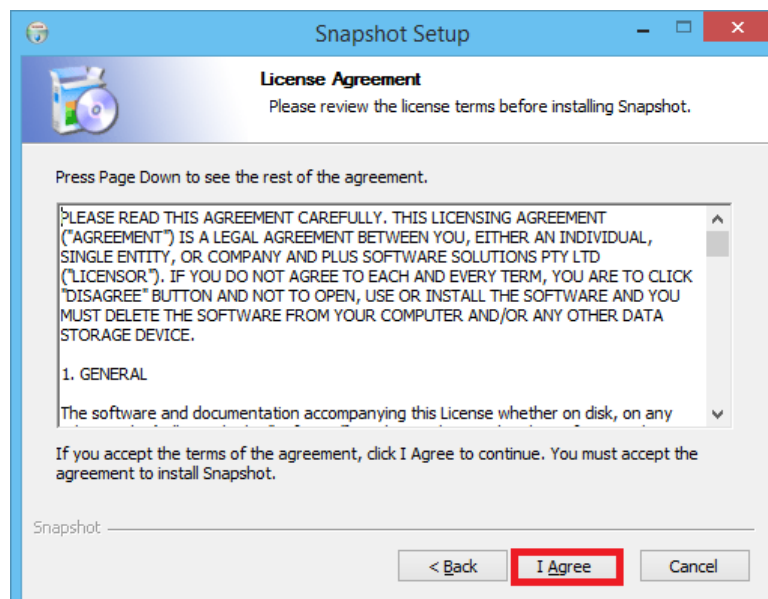
Microsoft reference article on collation types: <https://docs.microsoft.com/en-us/sql/relational-databases/collations/collation-and-unicode-support?view=sql-server-2017>

## Installation

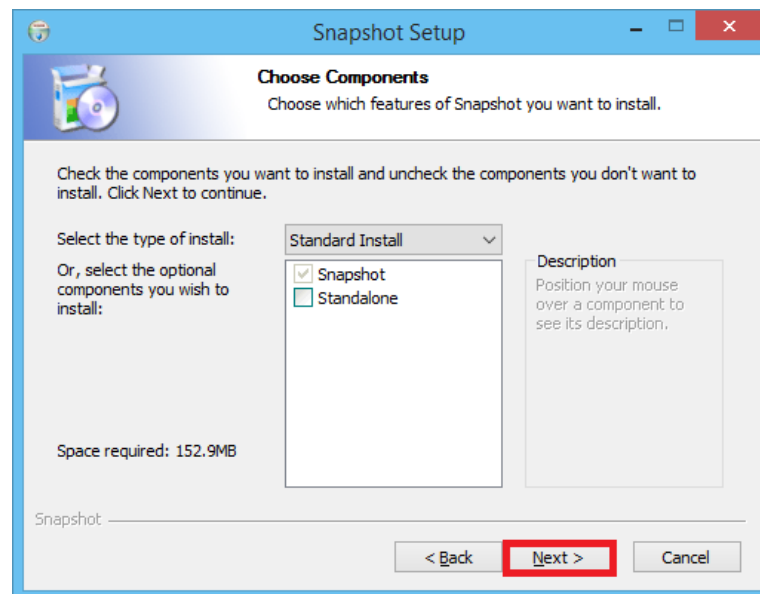
1. Download installation file from <http://www.plussoftware.com.au/software-downloads>
2. Run **Snapshot-setup.exe** to launch the installation wizard.  
 **Snapshot-Setup.exe**
3. Press Next on the Welcome to SnapShot Setup Screen



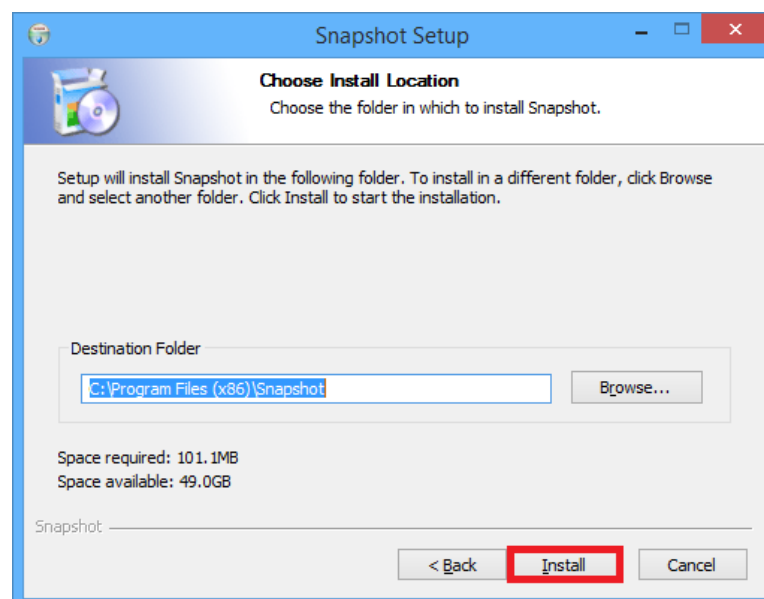
4. Read and accept the Licence Agreement by clicking **I Agree**.



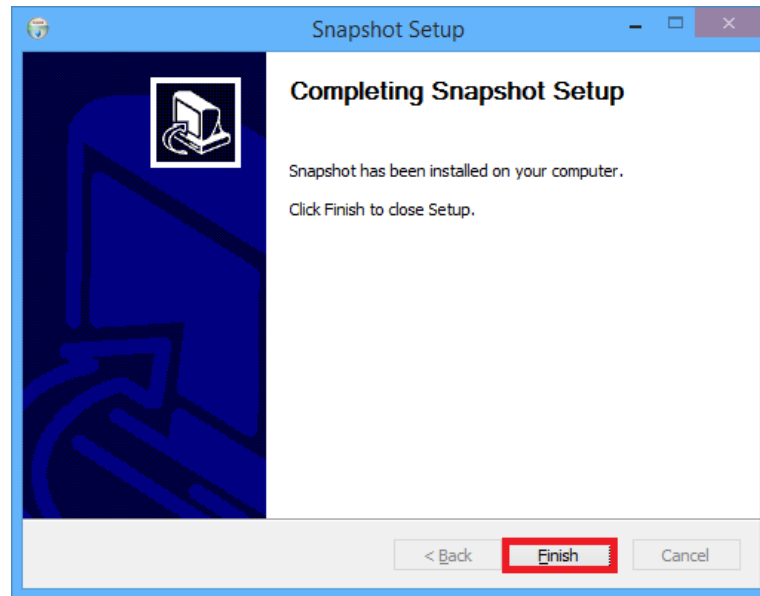
5. Press **Next** at the Choose Components screen.



6. Select installation location and press **Install** to start the installation process.

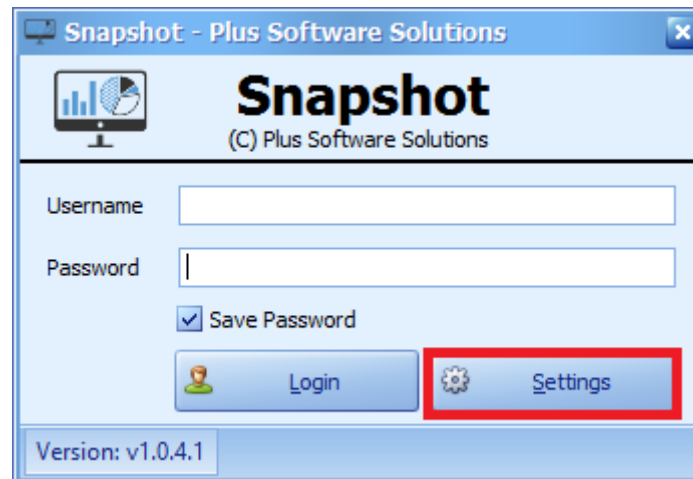


7. Press **Finish** to complete the installation of SnapShot.



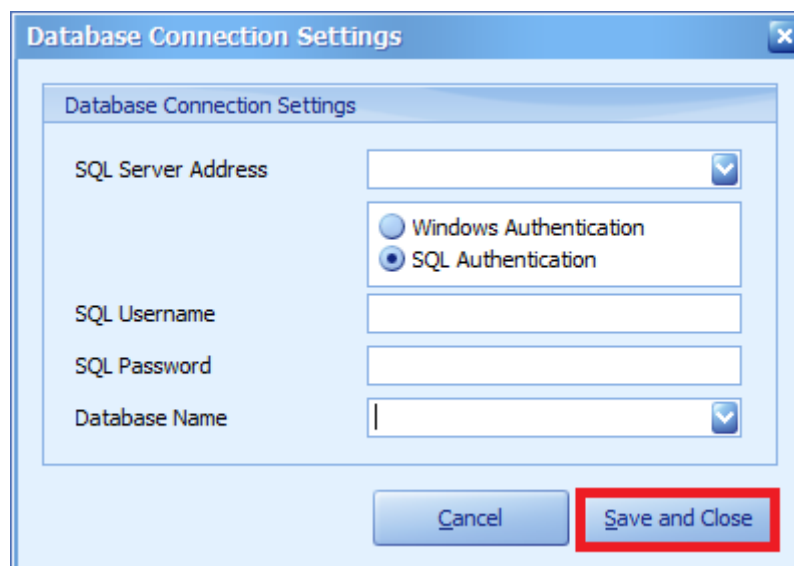
## Configuration

1. Launch the SnapShot software and Click the Settings button to setup SnapShot database



2. Enter the SQL Server settings to create a new SnapShot database. Type the desired database name (default is SnapShot) and or locate an existing SnapShot database by clicking the dropdown arrow and selecting it. Click **Save and Close** to return to the login screen.

Note: If creating a new database the user will need permissions to create databases.



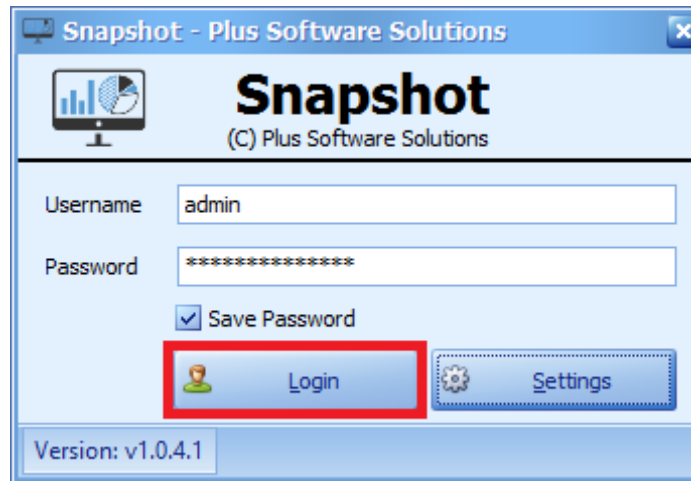


3. Enter the username and password and click the **Login** button to login to SnapShot.

*Default Username and Password is:*

*Username: admin*

*Password: reportingadmin*



## Setting up SnapShot on users computers

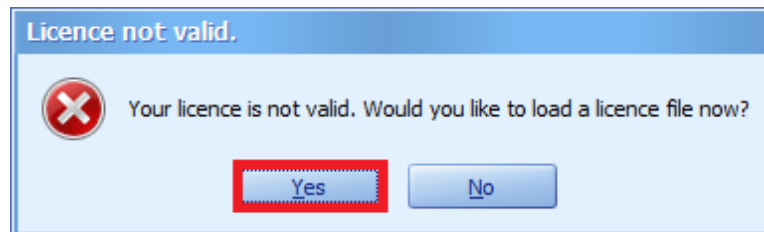
1. Follow the same instructions as the [Configuration](#) setup. On the settings screen enter all the same SQL server details as in the Configuration setup.

In the Database Name field, this time click on the drop down arrow and select the SnapShot database that was created in the [Configuration](#) setup.  
When you are finished click on **Save and Close**.

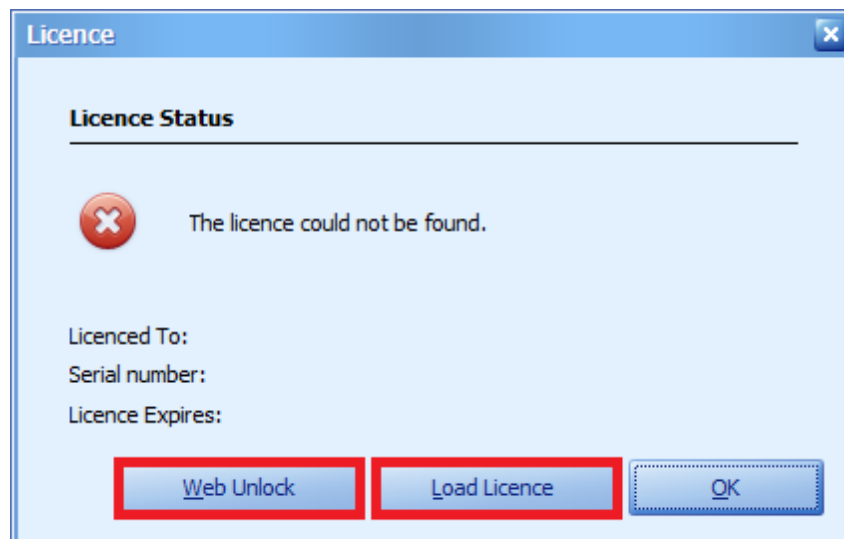
2. Either log in with the Admin username and password or with a specifically setup username and password.

## Licensing

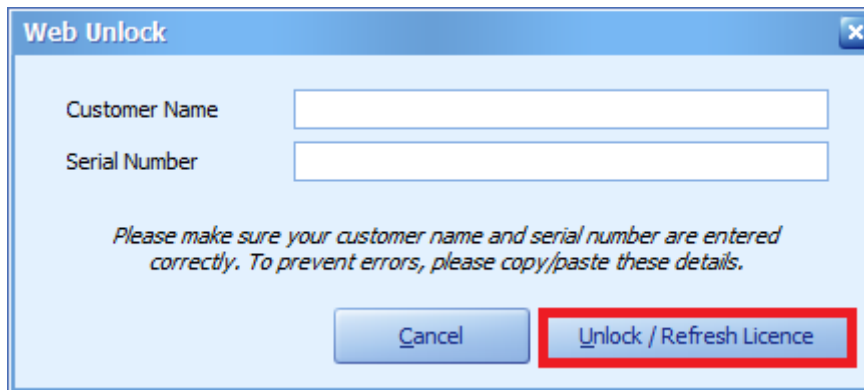
On the first login, the SnapShot database will need to be licenced, the below instructions also apply when updating the licence file from within the application by navigating to **Settings Tab > Load/View Licence**.



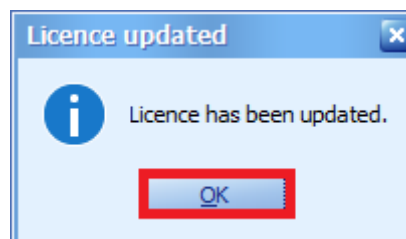
1. Click **Yes** to the licence prompt, this message is received if the SnapShot database has not yet been licenced.



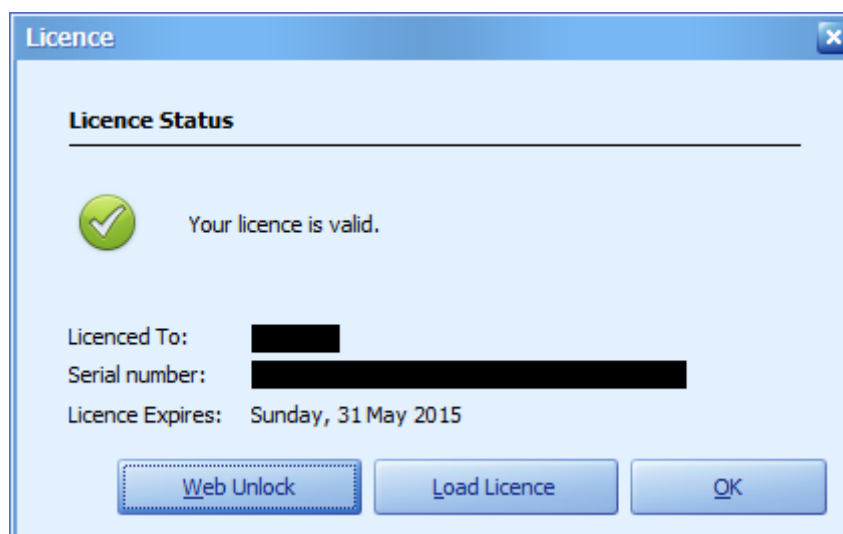
2. Click the **Web Unlock** or if you have a SnapShot Licence file click **Load Licence** button, browse to the SnapShot Licence file and click OK.



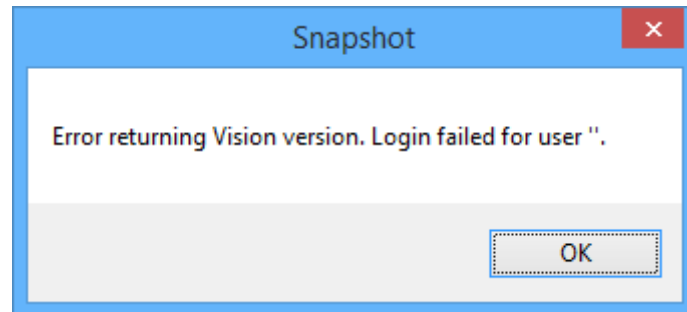
3. Using the Web Unlock method enter **Customer Name** and **Serial Number** **exactly as they have been provided to you by Plus Software** and press the **Unlock / Refresh Licence** button



4. Click **OK** to the Licence updated message



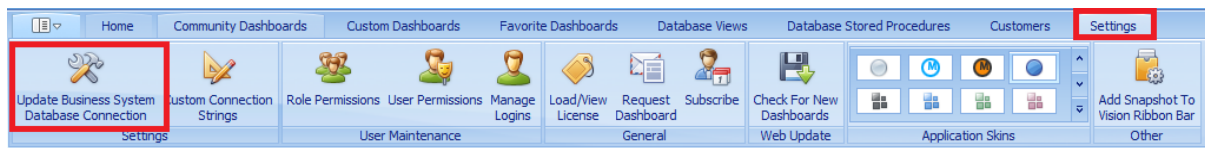
5. This window shows you the license details including the expiry date. Click **OK** again to progress to the next window.



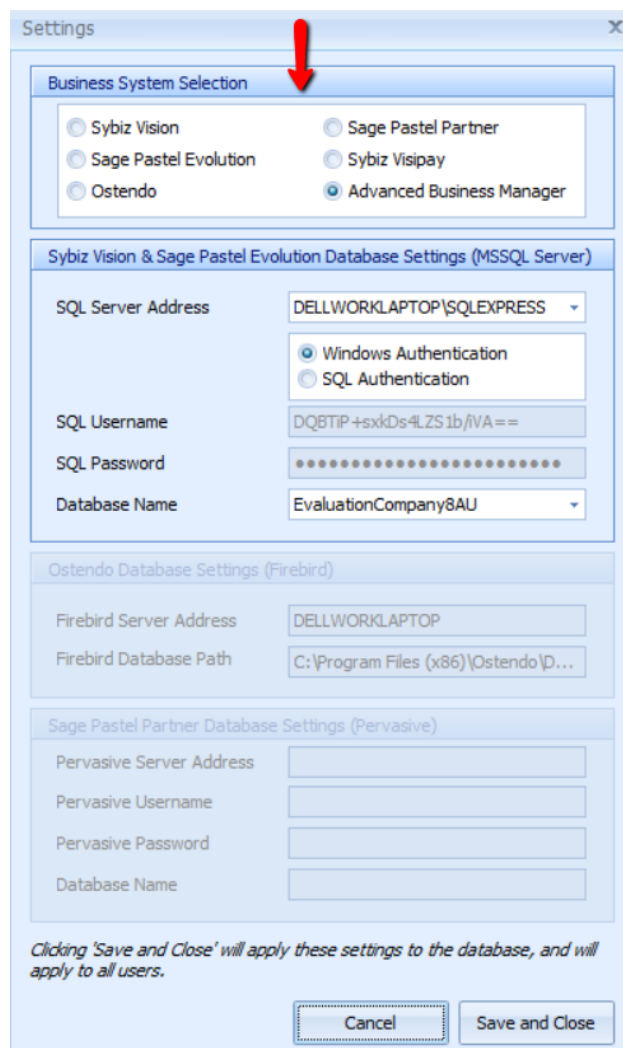
6. Click **OK** to any information messages that appear on first time login (this appears if no business system has been configured yet).

## Linking SnapShot to Business System

SnapShot needs to be linked to your business system for dashboard data to be displayed.



1. Select the Settings tab and click the **Update Business System Database Connection** button.

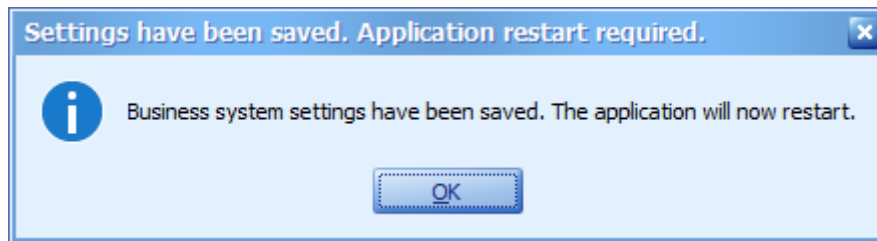


2. Select the type of **Business System** that SnapShot needs to be linked to and enter the relevant settings.

For Advanced Business Manager, Sage Pastel and Sybiz Vision/Visipay, it will be the SQL Server Address details.

For Ostendo it will be the Firebird Server Address details.

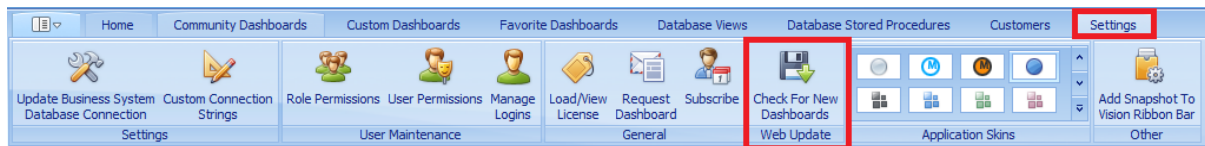
For Sage Pastel Partner it will be the Pervasive Server Address Details. Click **Save and Close**.



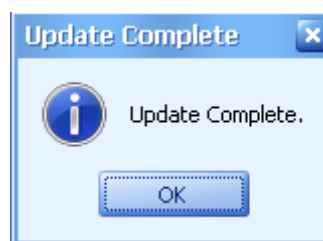
3. Click **OK** to the confirmation message. SnapShot will restart, log back in from the login screen.

## Updating Dashboards

SnapShot dashboards need to be downloaded from the internet, this ensures the latest updated dashboards are available.



1. Select the Settings tab and click the **Check for new dashboards** button.



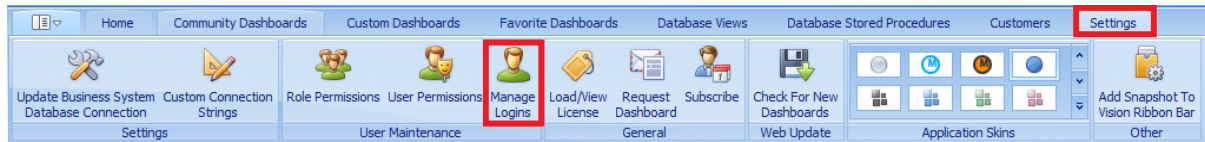
2. Click OK to the confirmation screen once complete.
3. Navigate to the **Community Dashboards** tab to view all the community dashboards, if any custom dashboards have been created they will appear under the **Custom Dashboards** tab.



## Adding/Deleting/Editing Users

### Adding Users

SnapShot has the ability to setup users which can be configured to only view particular dashboards.



1. Select the **Settings** tab and click the **Manage Logins** button.



2. Click the **Add** button to add a new user.

A screenshot of the 'Add/Edit Login' dialog box. It contains several input fields: 'Username' (filled with 'homer'), 'Display Name' (filled with 'Homer Simpson'), 'Password' (filled with '\*\*\*\*\*'), and 'Password Confirmation' (filled with '\*\*\*\*\*'). There is a 'Role' dropdown menu currently set to 'None'. Below these are several checkboxes for permissions: 'Administrator Access', 'Create/Copy Dashboards', 'Edit Dashboards', 'Delete Dashboards', and 'Migrate Dashboards', all of which are currently unchecked. At the bottom, there is a 'Custom Parameters' section with a table for 'Parameter Name' and 'Parameter Value'. The 'OK' button at the bottom right is highlighted with a red box. A 'Cancel' button is also present.

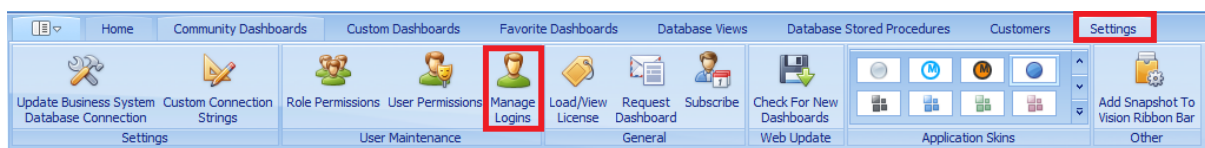
3. Enter the Username, Display Name, Password and click OK.

**Note:** ticking the box to provide Administrator Access will give the user access to all dashboards also the user will be able to change the Business System Settings, access the Manage Logins and Manage Permissions screens and check for new dashboards.

4. Once a user has been added, no dashboards will be visible to the new user, this can be configured under the Manage Permissions area (See Managing Permissions section).

## Editing Users

Users can be edited once they have been setup.



1. Select the **Settings** tab and click the **Manage Logins** button.



2. Select the **user** that requires editing and click the **Edit** button.

**Add/Edit Login** [X]

Username:

Display Name:

Password:

Password Confirmation:

Role:  [v]

Administrator Access: ☐ Allow access to admin features

Create/Copy Dashboards: ☐ Allow creating/copying dashboards

Edit Dashboards: ☐ Allow editing of dashboards

Delete Dashboards: ☐ Allow deleting of dashboards

Migrate Dashboards: ☐ Allow migrating of dashboards

Custom Parameters

Parameter Name	Parameter Value
*	

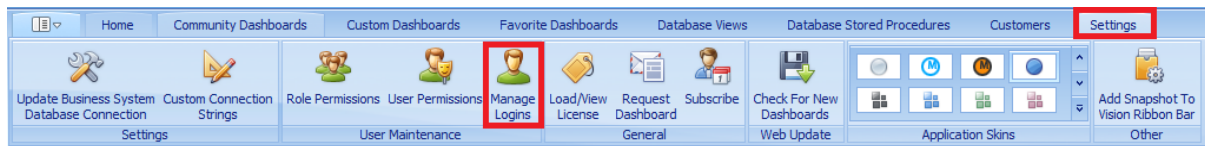
[<<] [<] [>] [>>] [+] [-] [v] [x]

Cancel OK

3. Make the necessary changes and click **OK**.

## Deleting Users

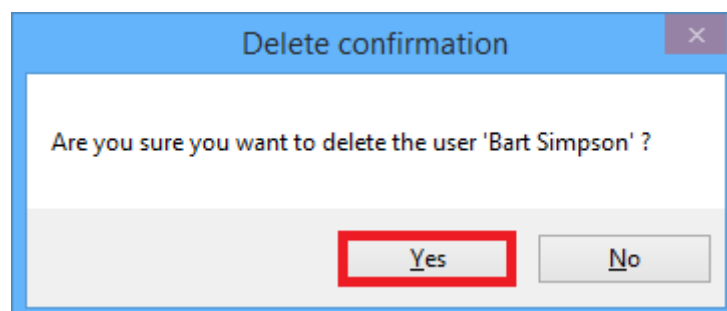
Users can be deleted once they have been setup.



1. Select the **Settings** tab and click the **Manage Logins** button.



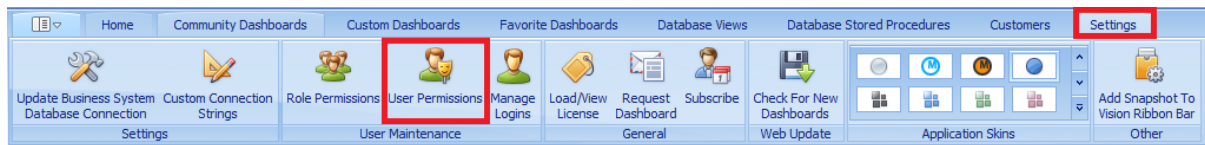
2. Select the **user** that needs to be deleted and click the **Delete** button.



3. Click the **Yes** button to confirm deletion of the user.

## Managing Permissions

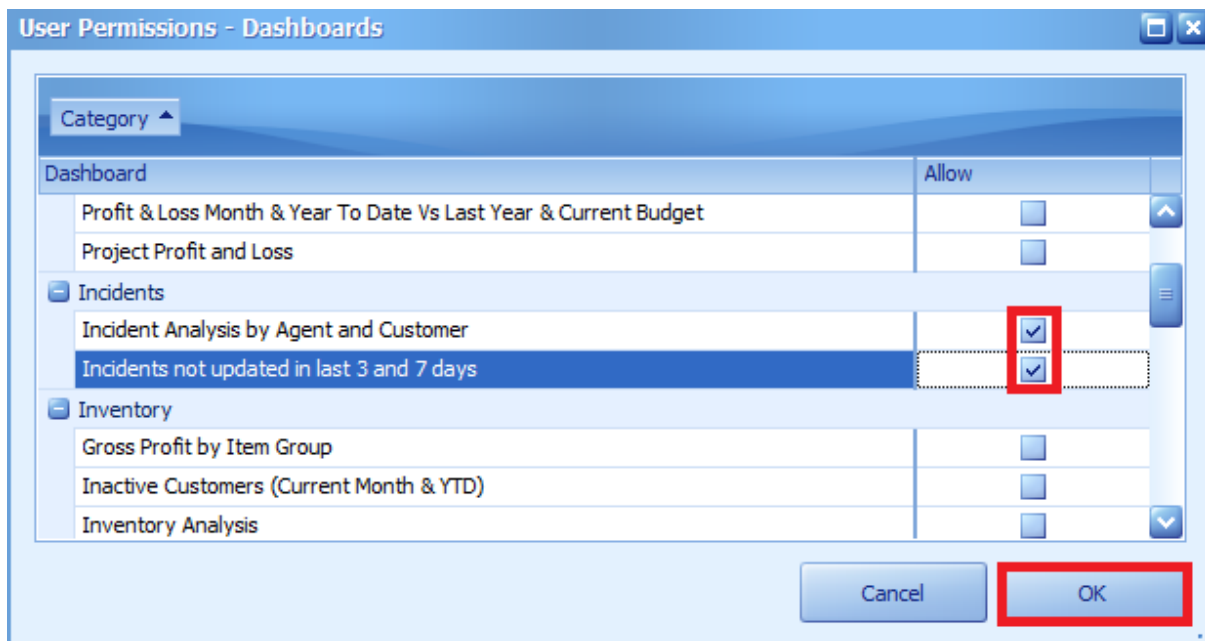
Once users have been created (see *Adding/Deleting/Editing Users* section to create users), permission to the dashboards they are allowed to run needs to be given. The default action is for users to not have access to a dashboard.



1. Select the **Settings** tab and click the **Manage Permissions** button.



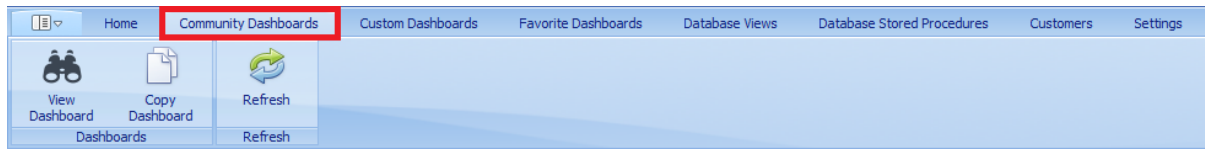
2. Select the **user** and click the **Dashboard Permissions** button.



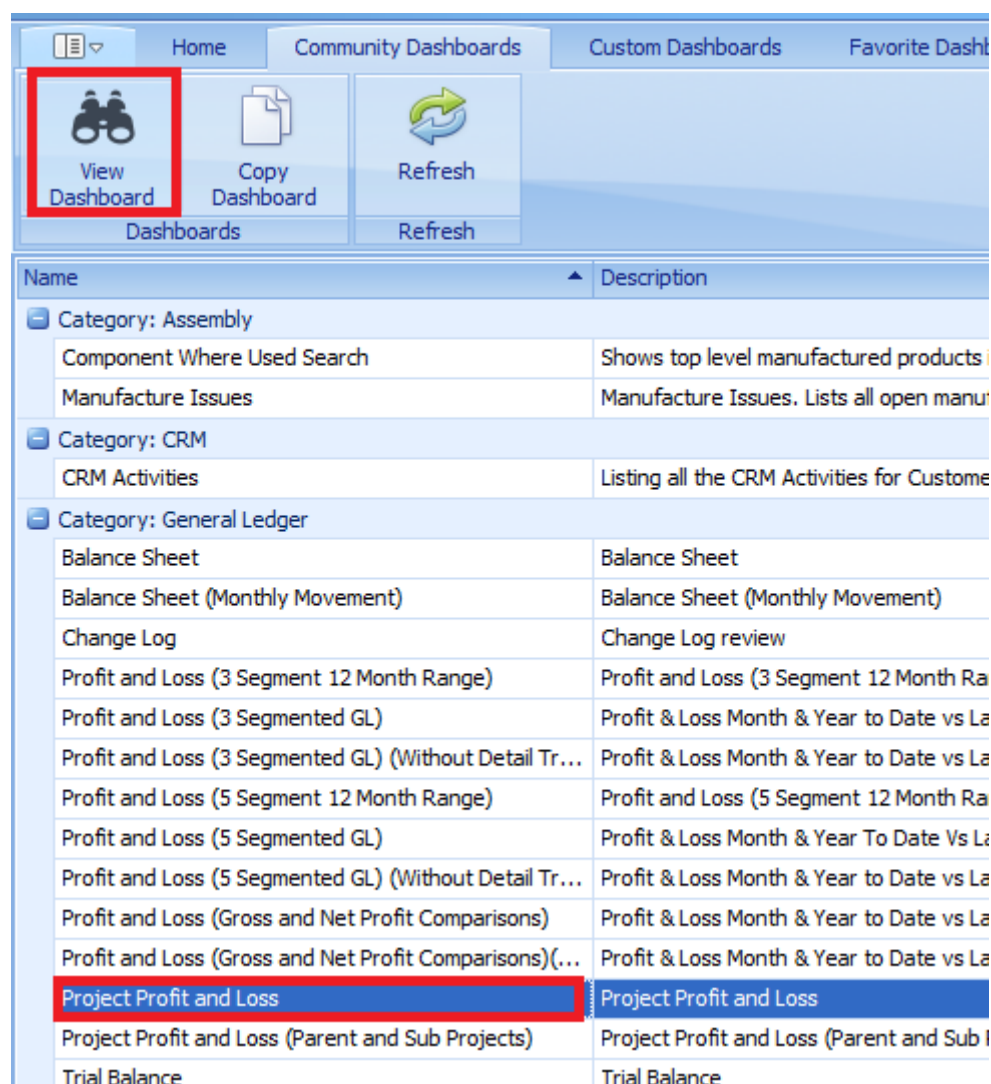
3. Tick the **Allow** box next to each dashboard item that the user requires access to and click **OK**.

# Viewing Dashboards

## Launching Dashboards



1. Navigate to the **Community Dashboards** tab to view all the community dashboards available.



2. Select the desired **dashboard** from the list then click the **View Dashboard** button, alternatively double clicking on the dashboard also launches it.

Note: The same method applies for any Customer Dashboards, which appear in the **Custom Dashboards** tab.