Introduction

This Quick guide will show you how to create and delete snapshots, and how to find the list with snapshots. In the end you know how to manage snapshots.

Quick guide concept

Through a number of easy steps you learn how to use the software.

Each step is numbered and defines a phase. Each phase contains a short description and an illustration to show how to navigate or operate in the software.

The guide *may* contain important general notices. These will be marked with an exclamation icon.

Tips and tricks are marked with an Info-icon.

Questions & Answers note relevant to the topic at hand.

Managing Snapshots

In BMS you have the possibility to take snapshots of the current state of your system. Snapshots are used only in cube reports and can help you build reports based on specific date-states of the system.

In particular, snapshots are created with forecasted units and P&L data. An automatic process creates one snapshot for every working-day at the end of the day.
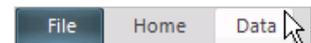
Create Snapshots

Snapshots are created automatically in the system everyday at the end of the day, but the user can take a snapshot anytime during the day for the current date. This is useful when the user wants to have a specific snapshot of the system's state at a specific time.

It is important to know you can only take one snapshot a day. If a user takes a snapshot two times during the same date, the latest taken will overwrite the oldest. Also, if a user has taken a snapshot during the day, the system will not automatically take a snapshot of that date, to prevent overwriting the users' snapshot.
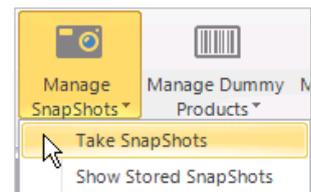
1 Go to Data

From the ribbon click on Data to go to the corresponding ribbon options.
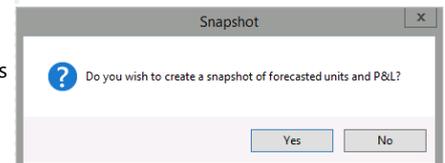
2 Take a snapshot

From the ribbon click on the Manage snapshots button to open the options list. From the options click on Take snapshots.
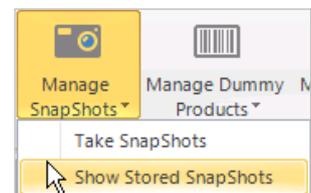
3 Verify the action

A window will open to ask for your verification of the action. Click Yes to create the snapshot.

4 Find the snapshot list

From the ribbon click on the Manage snapshots button to open the options list. From the options click on Show stored snapshots, the corresponding tab will open in the main screen of the application.

5 Identify and edit the taken snapshot

The snapshots are created with a default name of the date they are created. Edit the name as you like to reflect the specific snapshot.

More information that follow the snapshots are the Date which is the date the Snapshot it taken (not editable) and the YTD date (editable).

The Stored column indicates if the snapshot will be kept stored in the system. If it is not checked, the snapshot will be deleted at the end of the date. How to delete a snapshot is explained later in this guide.

The Include in cube column indicates if the snapshot will be part of the corresponding dimension in the cube. If it is not checked, the snapshot will not be in the cube.

Date	Name	Stored	YTD (Selected Date is not included)	Include In Cube
		☐		☐
05-09-2017	2017-09-05	☑	01-01-2017	☑
07-09-2017	2017-09-07	☑	01-01-2017	☑
08-09-2017	2017-09-08	☑	01-01-2017	☑
11-09-2017	2017-09-11	☑	01-01-2017	☑
12-09-2017	2017-09-12	☑	01-01-2017	☑
13-09-2017	2017-09-13	☑	01-01-2017	☑

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Deleting Snapshots

It is easy to delete snapshots in BMS. Simply uncheck the Stored check-box of the snapshot. But, there is a strict rule for deleting snapshots, created for safety reasons.

The rule follows like this:
Restriction on deleting snapshots; per one operation (night-job of the system) can be deleted not more than 5 snapshots (Current snapshot + 4 additional).
Priority rule applies as:
1. Current snapshot.
2. Temporary snapshots (daily snapshots for one month).
3. Old user's snapshots (from two years old and older).

To explain the restriction; first the most recent Snapshot will be deleted, then the oldest of the current month, and then, if there are any, the snapshots older than two years. Always following the maximum of 5 snapshots delete per operation.
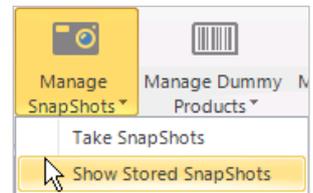
1 Go to Data

From the ribbon click on Data to go to the corresponding ribbon options.

File	Home	Data

2 Open the Stored snapshot list

From the ribbon click on the Manage snapshots button to open the options list. From the options click on Show stored snapshots, the corresponding tab will open in the main screen of the application.

Manage SnapShots | Manage Dummy Products

Take SnapShots
Show Stored SnapShots

3 Select the snapshots to delete

To mark a snapshot for delete, simply uncheck the check-box from the Stored column and the system will no longer keep the snapshot as stored. Consequently, following the delete snapshots restriction, the system will delete it.

SnapShots ✕

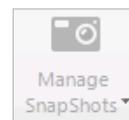| Date	Name	Stored	YTD (Selected Date is not included)	Include In Cube
		■		■
05-09-2017	2017-09-05	✔	01-01-2017	✔
07-09-2017	2017-09-07	✔	01-01-2017	✔
08-09-2017	2017-09-08	✔	01-01-2017	✔
11-09-2017	2017-09-11		01-01-2017	✔
12-09-2017	2017-09-12	✔	01-01-2017	✔
13-09-2017	2017-09-13	✔	01-01-2017	✔

4 Verify deleting

The verification of deleting the snapshot can be the next day, when the night operation of the system, following the delete snapshot restriction, will have deleted the snapshot(s) you unchecked as stored the day before.

SnapShots ✕

Date	Name	Stored	YTD (Selected Date is not included)	Include In Cube
		■		■
05-09-2017	2017-09-05	✔	01-01-2017	✔
07-09-2017	2017-09-07	✔	01-01-2017	✔
08-09-2017	2017-09-08	✔	01-01-2017	✔
12-09-2017	2017-09-12	✔	01-01-2017	✔
13-09-2017	2017-09-13	✔	01-01-2017	✔

Snapshots security

From Security its possible to manage the access of users/roles in snapshots. If the check-box is unchecked the snapshot icon will appear as not active.

Manage SnapShots

Data
- ☑ Interface
- ☑ Calculate
- ☑ Test end user performance
- ☑ Import actual sales
- ☑ Change accounting date
- ☑ SnapShots
- ☑ View end user performance

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