

CMS - Generate a Snapshot

Generate a Snapshot

This option enables you to create data that can be exploited in the **CAST Dashboard**. The action will generate a Snapshot on an **Application basis**, depending where you launch the action from - i.e. for multiple Applications if launched outside the [Application editor](#) and for the current Application if launched from within the [Application editor](#).

Launching

You can launch this option from various locations:

- [Application editor](#) > click the **Execute tab** and then select the **Take a snapshot of the application** option

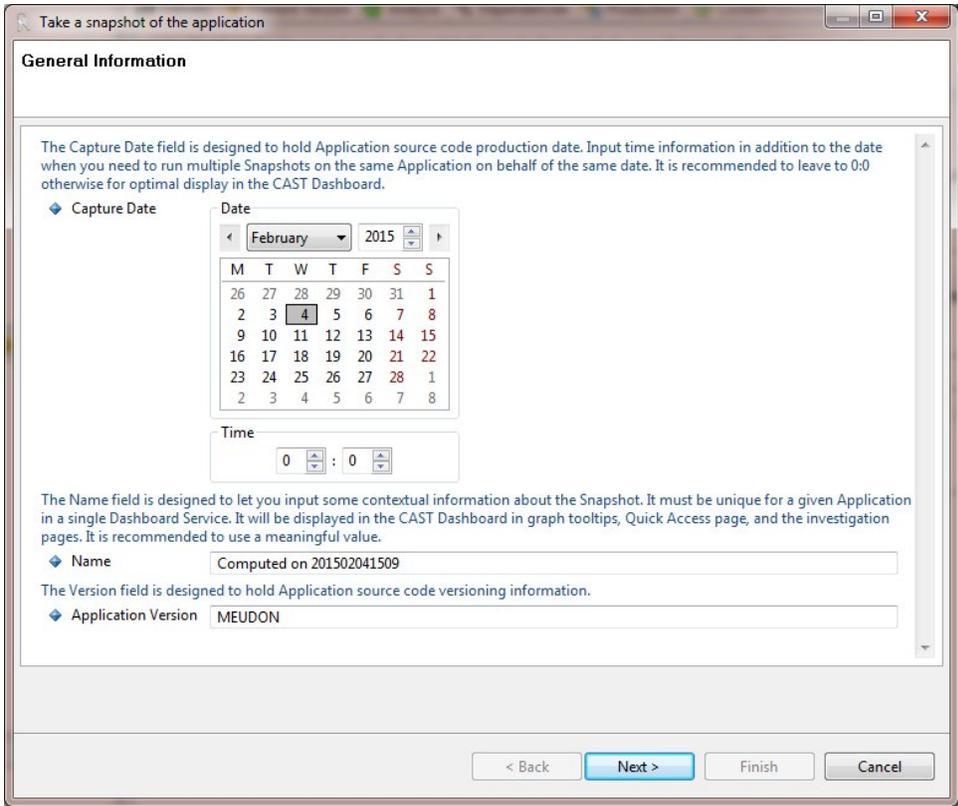
- [Applications view](#) > Right click the **Application** and select **Execute > Take a snapshot of the application**
- [Services view](#) > Right click the **Dashboard Service** and select **Snapshots > Take a snapshot for each application**
- [Dashboard Service editor](#) > Use the **Take a snapshot for each application** option in the **Snapshots tab**

Notes

- In order to use this option, you must have already set the Version as "**current**" in the [Delivery tab \(Application editor\)](#) and have checked and configured your [Analysis Units](#).
- It is NOT necessary to create a **User Defined Module** and associated **Object Filter** prior to the generation of a Snapshot. By default an [Automatic Module](#) will be created automatically for you: it will contain all your Analysis Units for the Application and will be called "<Application name> full content".
- If you use one of the **Take a snapshot for each application** options (as oppose to generating a snapshot for one Application) then the same Capture Date, Name and Application Version will be used for ALL snapshots that are generated.

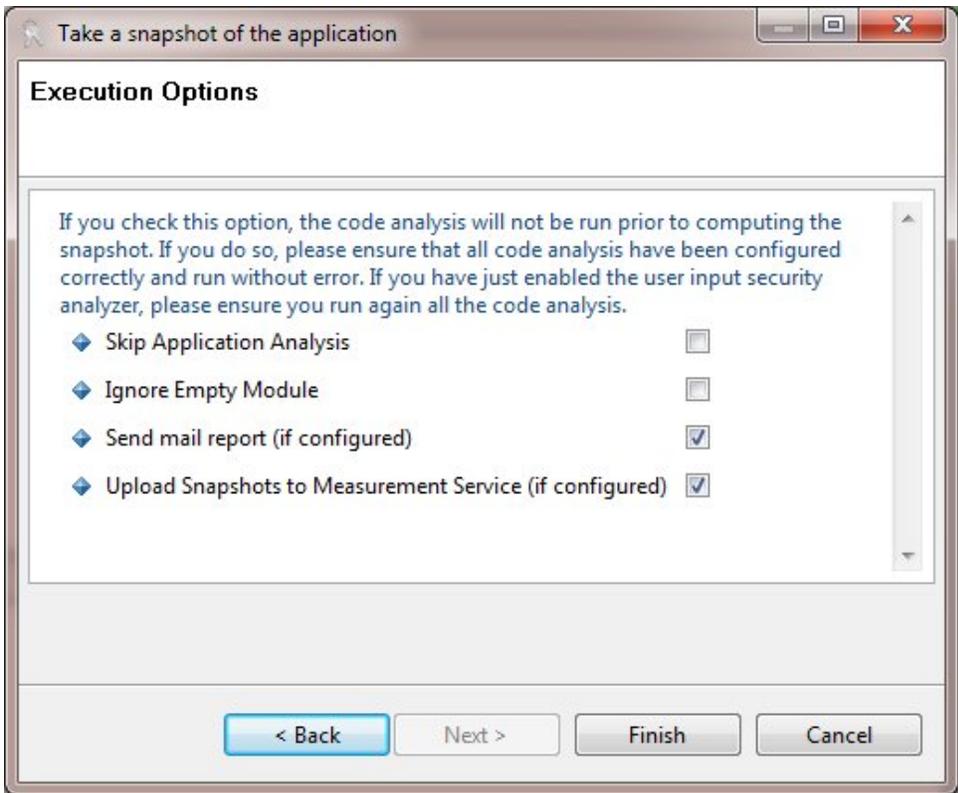
Generate Snapshot wizard

- When one of the snapshot generation options is selected, the **Generate Snapshot wizard** will then be displayed:



- The initial **General Information** wizard page enables you to select:
 - **Capture Date** - by default the current date will be pre-selected. If you wish to pre or post date your Snapshot, please select the correct date in the calendar. Note that you can also choose the **Hours** (24 hour clock applies) and **Minutes** using the fields underneath the date selector. When complete, the **Capture Date** will be displayed as follows: **DD/MM/YY HH:MM** - this is a Name displayed in the CAST dashboards.
 - If you generate a snapshot, with a capture date that is before an existing snapshot, the existing snapshot will be updated:
 - delta is recalculated, and the post process procedures that update schema tables required for dashboards are relaunched.
 - new data is also pushed to the associated Measurement Service schema (if one is associated to the Management Service schema for the Application).
 - **Name** - by default, the Name will be predetermined by the CAST Management Studio, based on the date and time the wizard is opened. You can, however, enter your own Name - but remember that the Name is displayed in the CAST Dashboard. Note that if you change the Capture Date, then the Name will not automatically update - if you wish to retain a date based Name, you need to update it manually.
 - **Application Version** - this field is simply an indicator for your own use. By default, the CAST Management Studio will enter the same Version name as defined for your Version in the [Application editor](#), however you are free to change this if necessary.

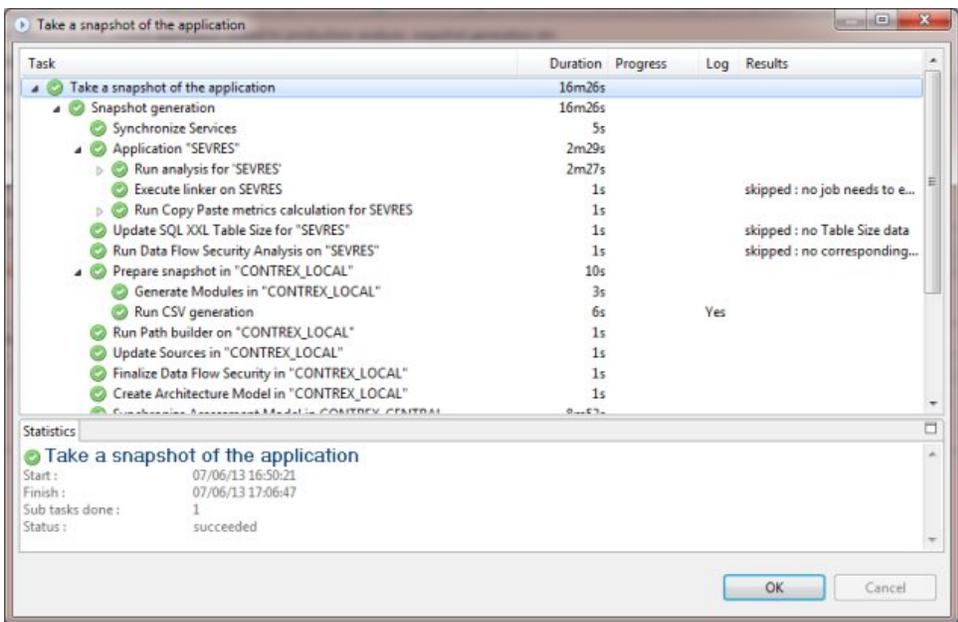
- Once all the fields have been filled in to your satisfaction, click **Next** to continue. The **Execution Options** screen will then be displayed:



- This page enables you to select:
 - Skip Analysis Job** - This option enables you to force the CAST Management Studio NOT to run the analysis of the source code (e.g. if you have already **run** it). This can save time during the process.
 - Ignore Empty Module** - This option will force the CAST Management Studio to ignore any **User Defined Modules** whose child **Object Filters** do not match any objects. In other words, if this option is not selected the snapshot generation process will halt in error on any modules with object filters that do not match any objects. Selecting this option will allow the snapshot generation process to continue, thus processing Modules with Object Filters that do match objects.
 - Send mail report (if configured)** > If you have defined an SMTP server in **Preferences - Mail** and you have defined a set of recipients in the **Application editor, Notes tab**, then ticking this option will send an email to the list of recipients when the snapshot generation is complete detailing the success (or otherwise) of the action.
 - Upload Snapshots to Measurement Service (if configured)** - This option will upload the snapshot results to the **Measurement Service** so that data can be investigated in the CAST Application Analytics Dashboard.
- Depending on certain choices you have made in the **Application editor**:
 - If you have assigned **multiple Dashboard Services** to the Application (see the **Execute tab** in the **Application editor**), the **Next** button will be available, enabling you to select the Dashboard Service you want to use to store the snapshot results and then click **Finish**:

- If you have only assigned **one Dashboard Service** to the Application (see the **Execute tab** in the **Application editor**), click **Finish**.
- The CAST Management Studio will then automatically generate a snapshot (or snapshots if you have multiple Applications and have chosen to generate a Snapshot for all applications) from scratch that can be immediately exploited in the CAST Dashboard.
- Note that the step **Synchronize Assessment Model** may take some time if this is the first snapshot generation process.

- When complete, you should see the a step-by-step list of the action's processes in a dialog box - see [View analysis log](#) for more information:



- You can now validate your snapshot information in the CAST Dashboard:
 - If you have defined a URL for your CAST Dashboard in the [Dashboard Service editor](#), then you can use the **Open Dashboard** option to launch a dashboard.
 - If you have not defined a URL for your CAST Dashboard in the [Dashboard Service editor](#), the CAST Management Studio will launch a temporary dashboard. This is primarily for validating the Snapshot. The portal is run on a JVM launched by the CAST Management Studio, hence an additional "java.exe" process will be displayed in Windows Task Manager. The JVM is killed when the CAST Management Studio is closed.
- Finally, it is possible to **edit**, **delete** or **consolidate** a generated Snapshot if required in the [Application editor](#) or the [Dashboard Service editor](#).

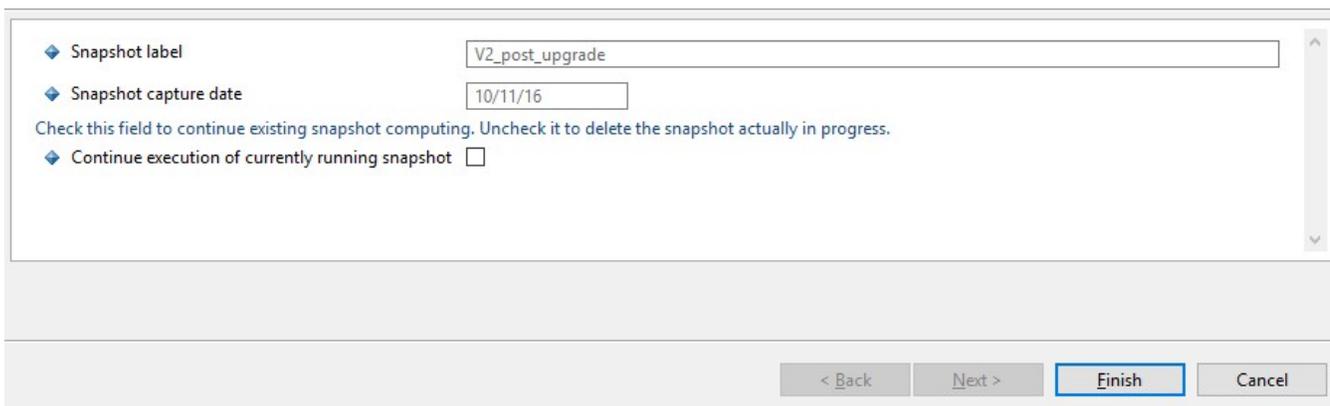
Snapshot currently in progress

When a snapshot fails, or when it is cancelled by clicking on the **Cancel** button when the snapshot is running, this means that the Dashboard Service schema is in an inconsistent state.

When the **Take a snapshot** option is next used, a pop-up will be displayed, asking whether you want to continue or delete the snapshot in progress:



Snapshot currently in progress



You should proceed as follows:

- If the snapshot was interrupted due to an **error**, then you must ensure the **Continue execution of currently running snapshot** option is not ticked, then click **Finish**. This will delete the interrupted snapshot.
- If the snapshot was interrupted because the **Cancel** button was clicked when the snapshot was running, then ensure that the **Continue execution of currently running snapshot** option is ticked, then click **Finish**. This will continue processing the interrupted snapshot.

Note that you can manage your snapshots in the [Application editor \(Execute tab\)](#) or in the [Dashboard Service editor](#).

