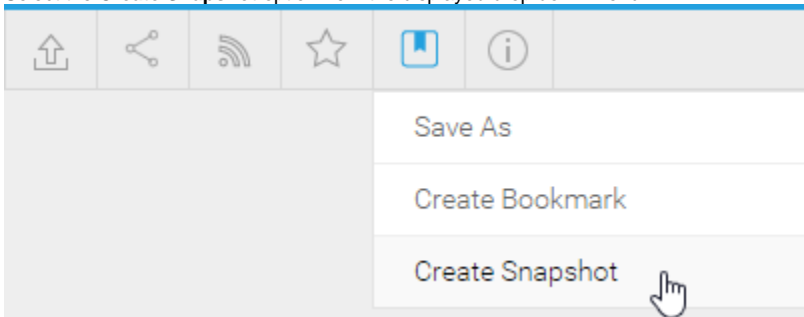# Snapshots

Overview

This allows you to save the result set of your current report with the drill paths and filters you've currently applied. A snapshot becomes a static report, meaning that you can no longer interact with it, it has been designed to preserve a result set at a point in time to use for comparison later.

Creating a Snapshot

In order to save a Snapshot of your report, in its current filtered and drilled state:

1. Click on the **Bookmarks** menu in the Report Builder
2. Select the **Create Snapshot** option from the displayed drop down menu

3. Fill in the details required in the Create Snapshot lightbox

    a. **Name:** provide a name for your snapshot
    b. **Description:** provide a description of your snapshot
       Note: We recommend you describe the report so users understand what filters have been applied.
    c. **Security:** initially the bookmark will be Public (open to anyone that has access to the category and sub category the report is stored in), to secure the snapshot simply select users or groups that should have access.
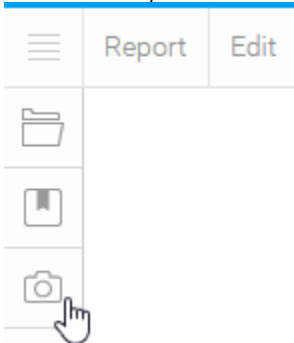4. Click **Ok** to save the snapshot
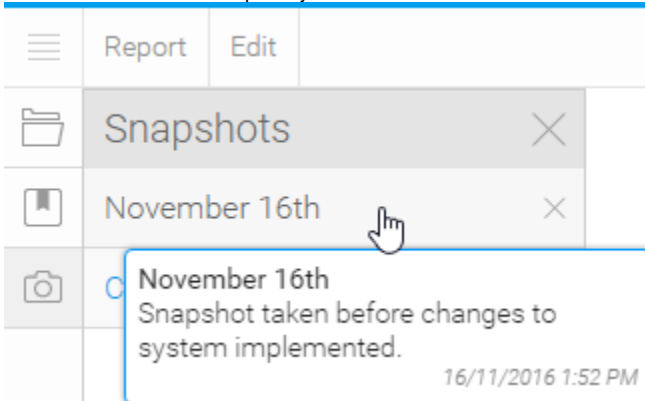
Viewing a Snapshot

In order to view a snapshot you will need to:

1. Locate and open the report it is based on

2. Click on the Snapshot button on the left navigation panel

3. Select the name of the Snapshot you wish to view

Note: when you are viewing a snapshot you will see the following message to remind you that the report is static and contains historical data. Click on the link to return to the live report.
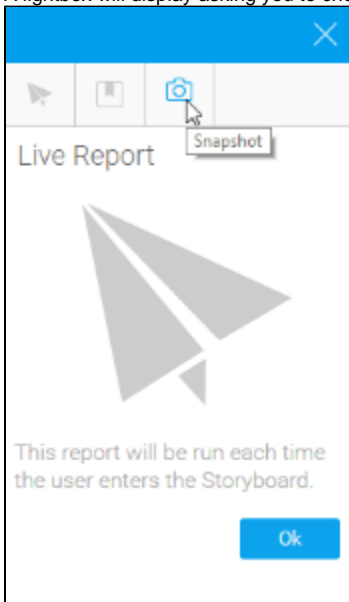
You are viewing a report snapshot. Click here to run the report with the latest data.
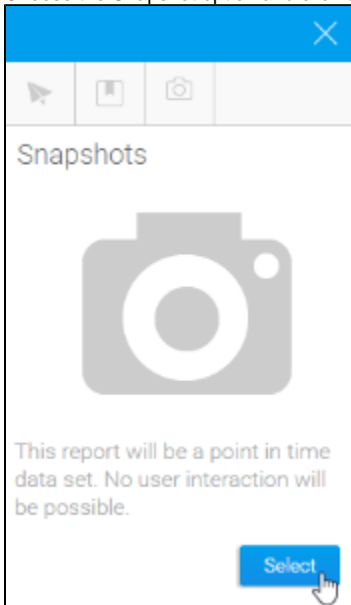
Using a Snapshot

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Snapshots can be used within Storyboards in Yellowfin. In order to use them:
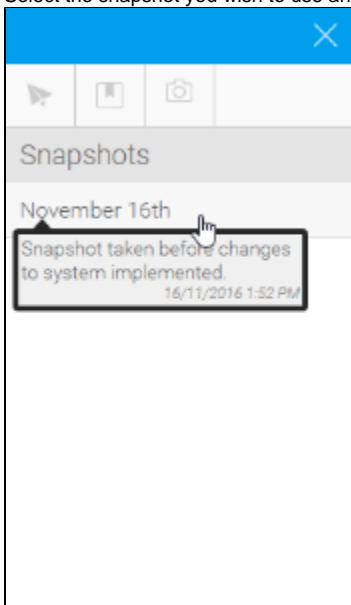
1. Locate and add the report the snapshot is based on to the slide
2. A lightbox will display asking you to choose to add either the original report or a snapshot to your content

3. Choose the Snapshot option and click Select

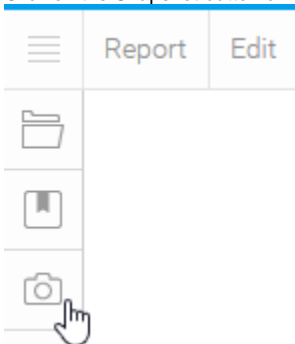4. Select the snapshot you wish to use and click Ok

Deleting a Snapshot

In order to delete a snapshot you will need to:

1. Locate and open the report it is based on
2. Click on the Snapshot button on the left navigation panel

3. Click on the delete button next to the snapshot you wish to remove
   You are viewing a report snapshot. Click here to run the report with the latest data.
4. You will now be prompted to confirm the deletion

⚠ Are you sure you want to delete this snapshot?

[Ok] [Cancel]

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