

Snapshots

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Overview

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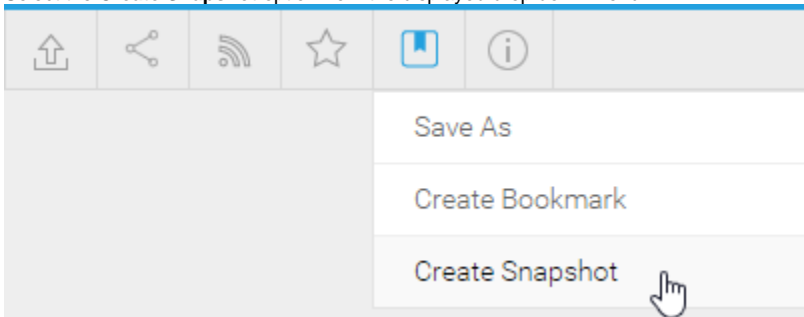
This allows you to save the result set of your current report with the drill paths and filters you've currently applied. A snapshot becomes a static report, meaning that you can no longer interact with it, it has been designed to preserve a result set at a point in time to use for comparison later.

Creating a Snapshot

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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 screenshot of the 'Create Snapshot' lightbox. The lightbox has a blue header with the title 'Create Snapshot' and a close button. Below the header, there is a text area with the following text: 'A snapshot will save the report and its data as you see it now. This will allow you to share both the data and the filter settings.' Below this text, there are three input fields: a date field containing 'November 16th', a description field containing 'Snapshot taken before changes to system implemented.', and a security field containing 'Public + Add people to make private'. At the bottom of the lightbox, there is a blue 'Save' button with a mouse cursor pointing at it.

- 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

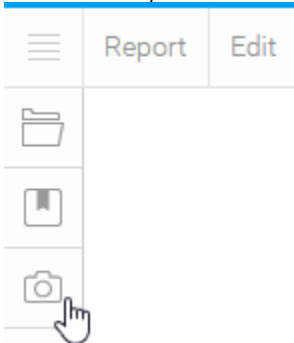
Viewing a Snapshot

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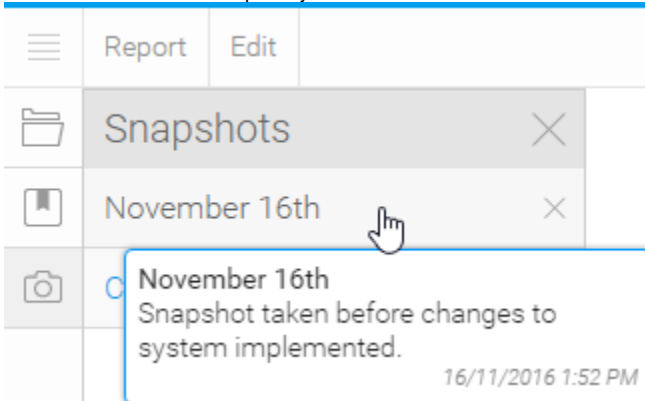
In order to view a snapshot you will need to:

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.

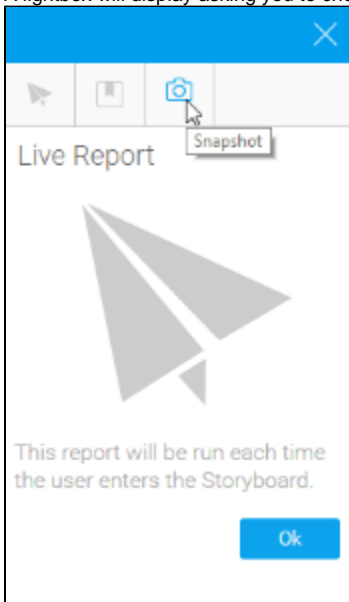
You are viewing a report snapshot. [Click here to run the report with the latest data.](#)

Using a Snapshot

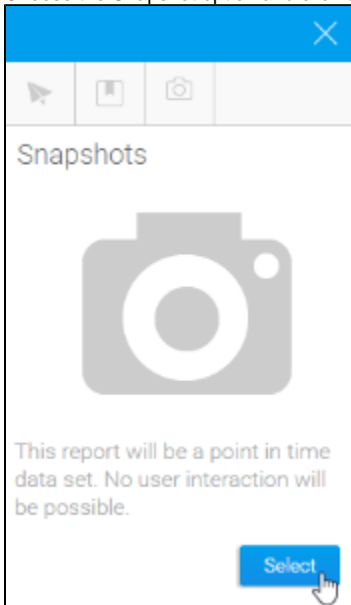
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Snapshots can be used within Storyboards in Yellowfin. In order to use them:

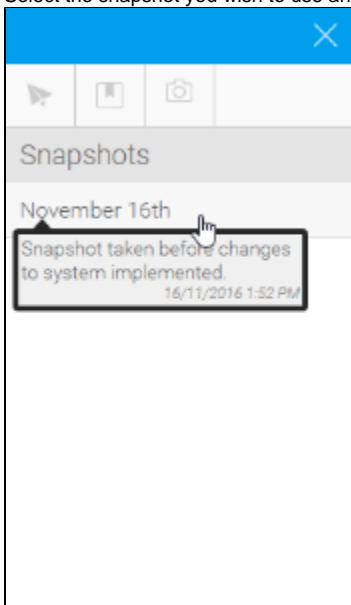
1. Locate and add the report the snapshot is based on to the slide
2. A lightbox will display asking you to choose to add either the original report or a snapshot to your content



3. Choose the Snapshot option and click Select



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

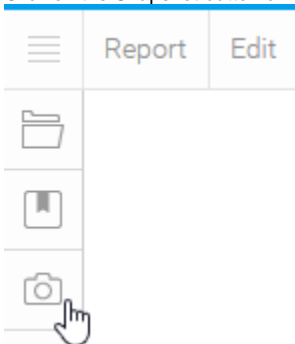


Deleting a Snapshot

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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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