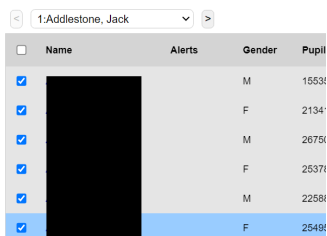# CREATING AND MANAGING SNAPSHOTS

A snapshot is a static list. It always displays the same records unless it is manually edited. Only the person who created the snapshot can add or remove students from it. Use a snapshot to take a picture of a group of records you will need to access regularly or need to save.

For example, assume you manage the Math Club and want to be able to quickly access all of its members. You can individually select the students initially, and then create a snapshot of the group. Once you create a snapshot, the group of students in the snapshot doesn't change (although users can modify a snapshot manually).
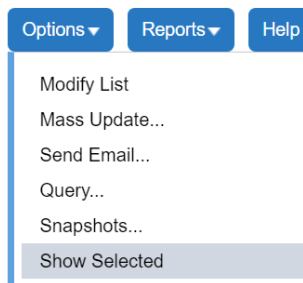
CREATE A SNAPSHOT

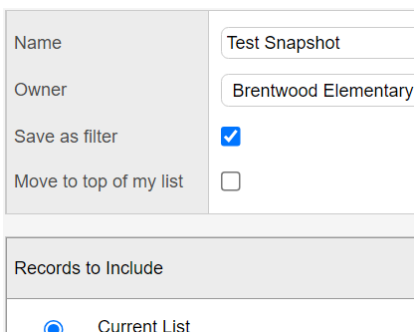1. Select the checkbox next to each record you want to include in your snapshot

2. **Options > Show Selected.**
    a. Missing the **Show Selected** step is a common mistake.
    b. For quick access, be sure to **Save As Filter**.

3. **Options > Snapshots…**
4. Click **New**
5. Name Snapshot
6. Set the owner (Specific user or School)
7. Select **Save as Filter** to add to Filter list

8. Click **Save**
9. Select the snapshot in the list, then click **Use** button

> Test Snapshot   School
>
> **+ New**   **Copy**   **Delete**
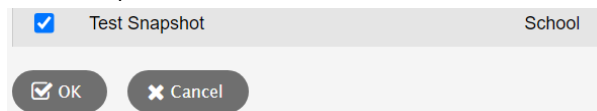>
> **Use**   **✖ Cancel**
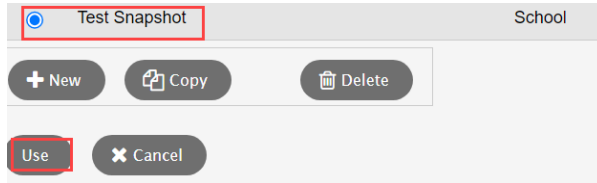
10. Click the Filter icon to return to **All Active Students**.

ADD A STUDENT TO THE SNAPSHOT

Note: You are actually adding the snapshot to the student.

1. Select a student record
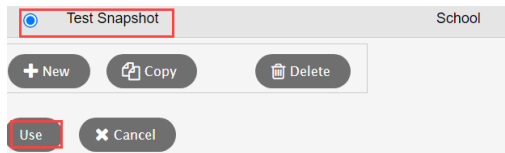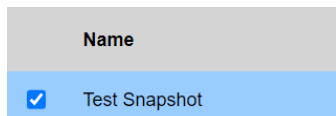2. Snapshots ST > Options > Add
3. Select Snapshot from the list

> ☑ Test Snapshot   School
>
> **☑ OK**   **✖ Cancel**

4. **OK**

REMOVE A STUDENT FROM A SNAPSHOT

Note: You are actually removing the Snapshot from the student.

1. **Options > Snapshot**
2. Select the Snapshot > Use

> ◉ Test Snapshot   School
>
> **+ New**   **Copy**   **Delete**
>
> **Use**   **✖ Cancel**

3. Select the student to remove
4. Snapshots ST
5. Select the snapshot to delete

Name
☑ Test Snapshot

6. **Options > Delete**

REMOVE THE SNAPSHOT FROM THE FILTER

1. Filter Icon > Manage Filters
2. Highlight Filter to Delete > Click **Delete**
3. Close

DELETE A SNAPSHOT

1. **Options > Snapshots**
2. Select Snapshot to delete
3. Click **Delete**
4. OK