



Create Snapshot

Capital Planning Step 6b

VUMC employees can create snapshots of current data to keep for future reference under Workday's Capital Planning Tool. Follow the steps below to create a snapshot in Workday.

From the Workday Homepage:

1. Type **Capital Planning** into the **search bar** and press **enter** on your keyboard.

Note: Capital Planning will be found under **Tasks and Reports**.

2. Under **Create Snapshot**, select **Click Here ->**.

3. A new window will appear. Use the prompt icon to apply filters for **Fiscal Year**.

Note: You can select multiple **Fiscal Years** and apply required (*) or optional filters if necessary.

4. Select **OK**.

5. A table will appear from the filters you selected. Select **Create Snapshot**.

6. A new window will appear, prompting you to name this snapshot. Type in the **name** and select **OK**.

7. A confirmation page will appear when the snapshot has been created. A date and time stamp will be appended to the user input at the end. Select **Done** to exit.

1. Search bar: capital planning

2. [Click Here ->](#)

3. Create Snapshot Filters dialog box:

- Fiscal Year *
- Org Area
- Operating Entity
- PCC/Department
- Capital Request Status
- Capital Request Name
- Routine/Strategic
- Modifier

4. OK / Cancel buttons

5. Create Snapshot button

6. Confirm Create Snapshot dialog box:

Provide a snapshot name and click **OK** to create a snapshot.

Snapshot Name *

6. Input field for Snapshot Name

6. OK / Cancel buttons

7. Done button

QUESTIONS?

Please email BusinessEducation@vumc.org.