workday. | VUMC BUSINESS EDUCATION

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.**

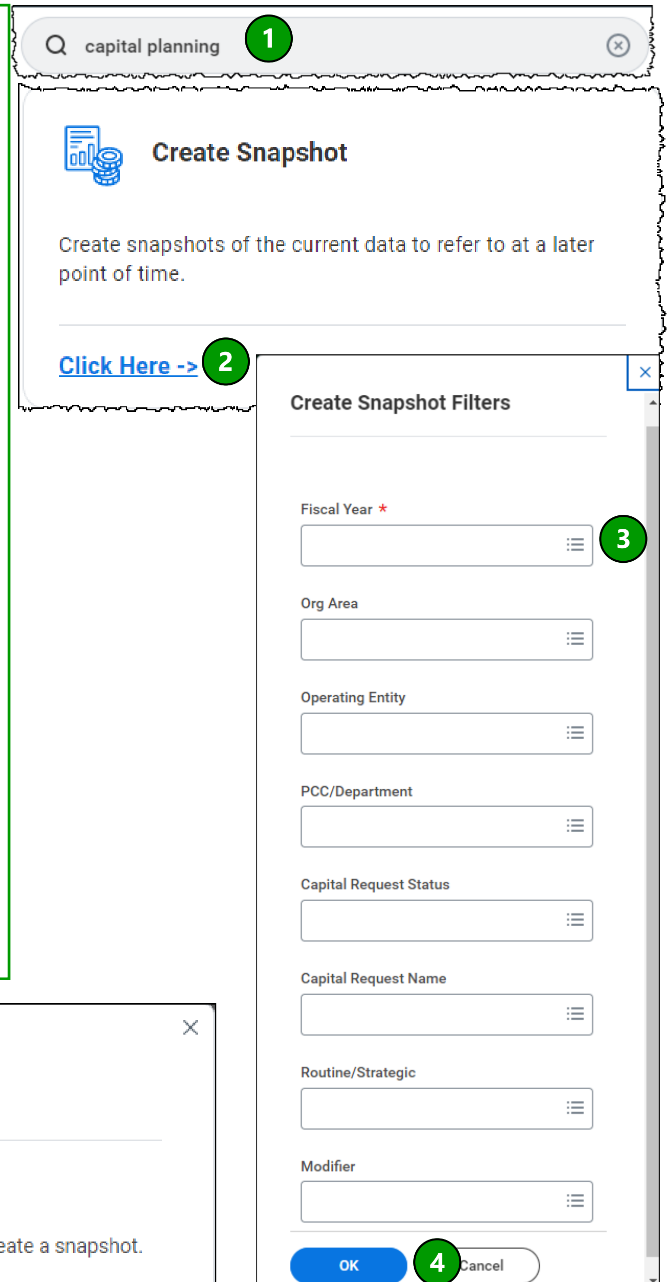
Note: You can select multiple **Fiscal Years** and apply required (*) or optional filters if necessary.

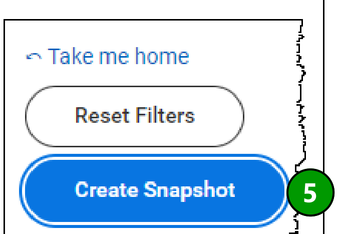
4. Select **OK**.

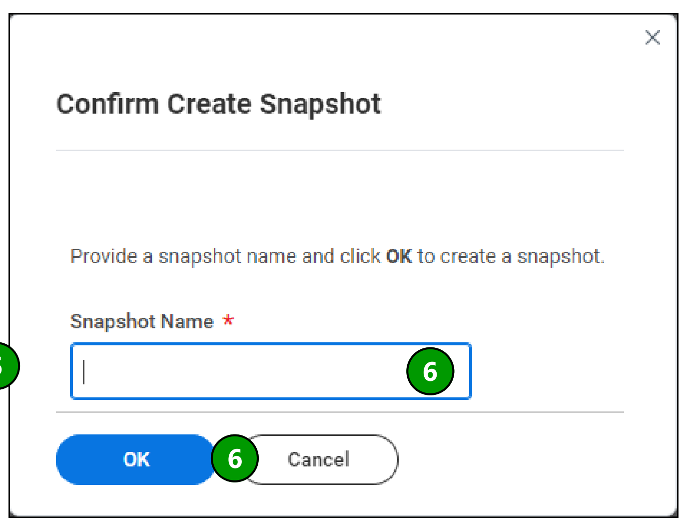
5. A table will appear from the filters you selected. Select **Create Snapshot**.

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.







QUESTIONS?

Please email BusinessEducation@vumc.org.