Creating New A3/RIE/VSM Work in Planview

**Definitions**

**A3/RIE/VSM:** VUMC has created this custom work type in Planview that allows project managers to keep track of high-level summary details about certain LEAN events (A3 projects, Rapid Improvement Events, and Value Stream Mapping events). This work type generates simpler WBS templates and provides less reporting functionality than other work types (Large, Standard, or Small projects).

**Icons in this job aid**

**Steps**

**Open the Work Menu**

1. Log into Planview: [https://vumc.pvcloud.com/planview/](https://vumc.pvcloud.com/planview/).
2. Click **Work** to open the Work menu.

   ![Planview Work Menu](https://example.com/work_menu.png)

   In the Work menu, click **+ New Work** in the Show menu.

**Complete Work Basic Information**

1. Choose the **Service (SVC) or Program (PRG)** with which your Work aligns by doing one of the following:
   a. Type a **keyword** and click the **magnifying glass** icon to select from a list of choices.
Creating New A3/RIE/VSM Work in Planview

b. Click the **bookmark** to choose from a list of “favorites” you have previously bookmarked.

c. Click the **data picker** icon to browse through the organizational hierarchy for the correct department.

Note: This method will open a new window.

2. Enter your project or program’s name into the **Work/Project Name** field. Choose a name that ensures easy identification.

3. Select **Requestor Priority** from the dropdown list. (This field is required even though you are not going through the Request process in Planview.)
Creating New A3/RIE/VSM Work in Planview

4. Select “A3/RIE/VSM” Work Type from the dropdown menu.

5. Select the Requested Start and Requested Finish dates for your project/program (if known).

6. Click Continue to proceed.
Creating New A3/RIE/VSM Work in Planview

Complete Project Attributes

1. Use the magnifying glass, bookmark, or data picker icon to select the **Responsible Project Mgr.**

![Image of Responsible Project Mgr.

2. Select the appropriate event type from the **Hospital Template Type** dropdown menu (A3, RIE, or VSM).

![Image of Hospital Template Type menu]

3. Select the hospital/clinic where the event is occurring from the **Group Type** dropdown menu.

![Image of Group Type menu]

For additional support, please visit the [EPMO website](http://www.epmo.com).
4. Enter a description of the event in the Work Description field.

5. Use the magnifying glass, bookmark, or data picker icon to select the Requesting Customer Group.

Note: If you do not see the program name listed, please email the EPMO team for assistance.

Complete Final Step

1. After completing the steps above, the Final Step of the Add New Work lifecycle appears.
2. Click Save to complete this step of the lifecycle.

Note: This step must be completed in order to generate a project schedule template for this project.

For additional support, please visit the EPMO website.