Creating New Work (Adding Active Projects) in Planview

Definitions

Work: In Planview, projects and programs are documented as Work.

Active Project: An active project is already approved by a sponsor and assigned to a project team. Only active projects should be entered directly as work. Projects that have not yet been approved should undergo the Request process prior to becoming Work.

Icons in this job aid

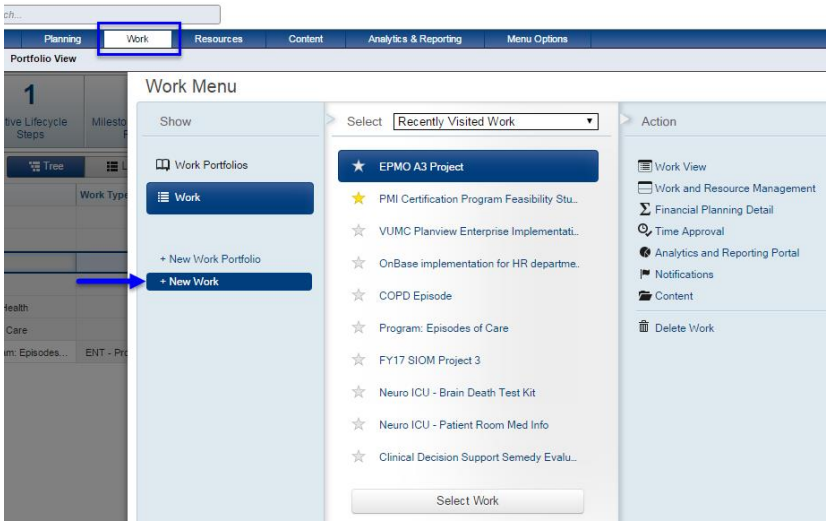
Information

Steps

Open the Work Menu

1. Log into Planview: https://vumc.pvcloud.com/planview/ using your SSO.
2. Click **Work** to open the Work menu.

3. In the Work menu, click **+ New Work**. The New Work pop-up window opens.



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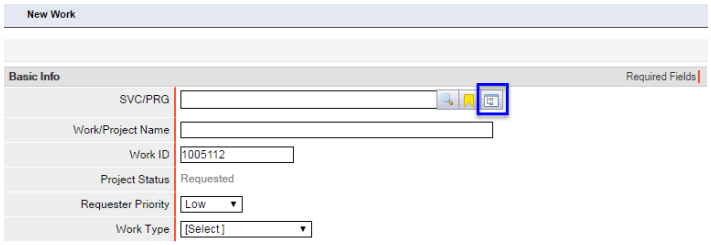
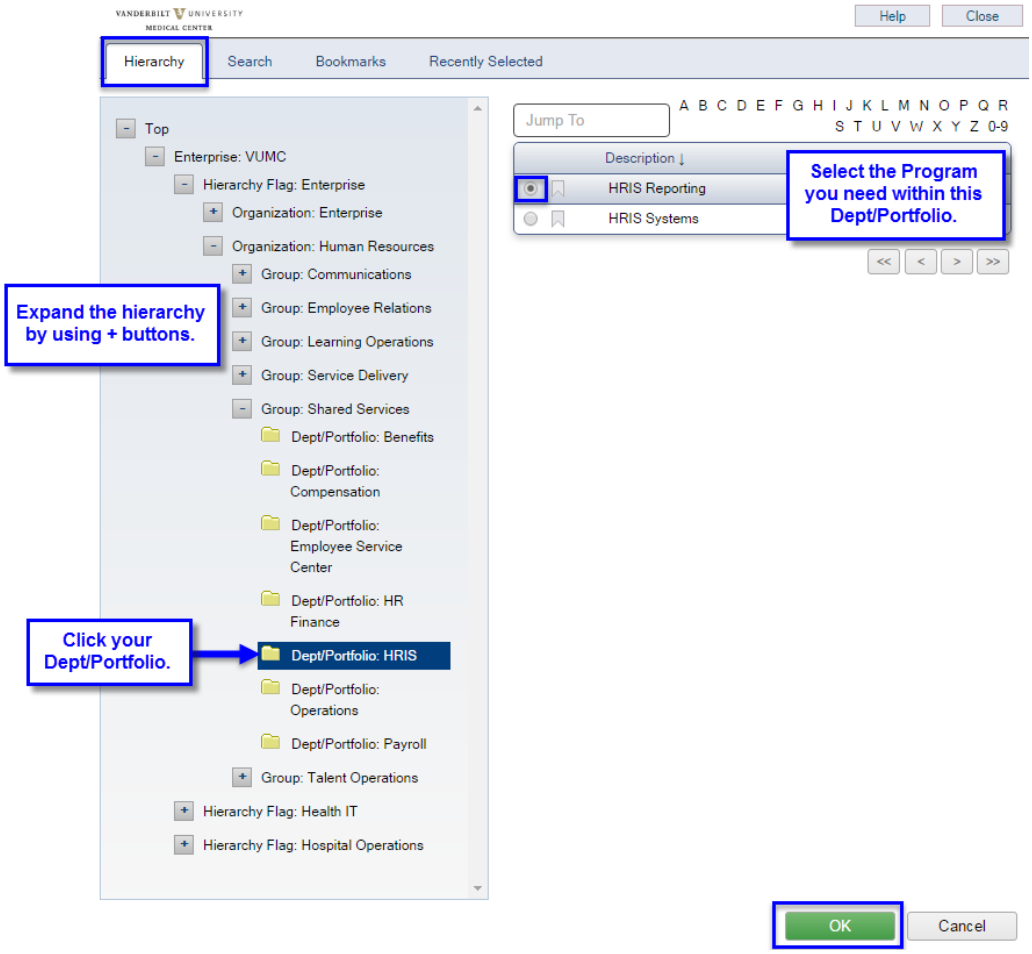
Complete New Work Basic Info

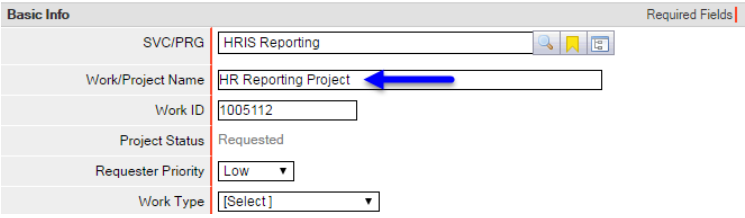
1. Click the **data picker icon** in the SVC/PRG field to select the program with which your project aligns.



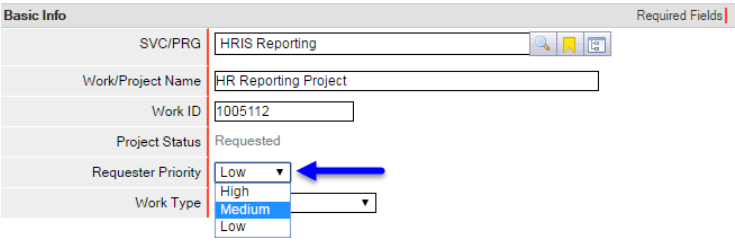
2. In the pop-up window, click the **Hierarchy** tab. Use the **+** buttons to expand the hierarchy down to the Dept/Portfolio where your program resides. Click the **radio button** to select your program. Click **OK**.



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

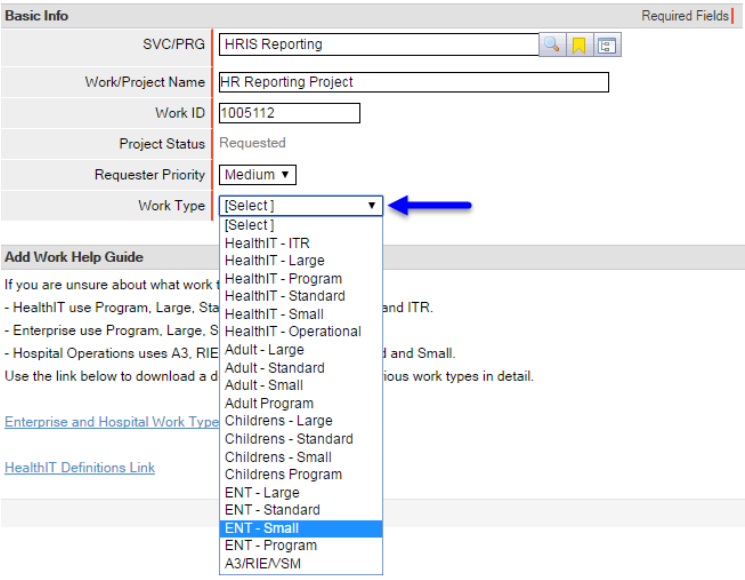


4. Select **Requestor Priority** from the dropdown list.



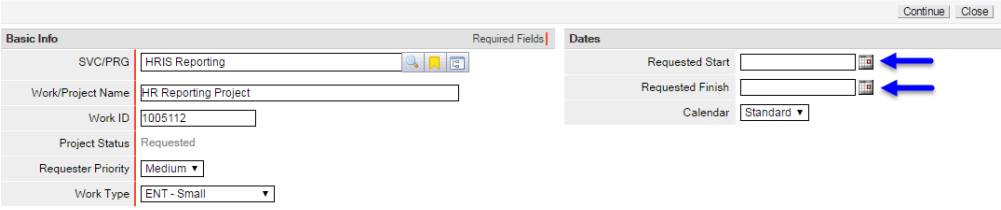
Note: This field does not affect reporting; the project manager creating the work should select based on departmental or personal priorities.

5. Select the **Work Type** from the dropdown menu.

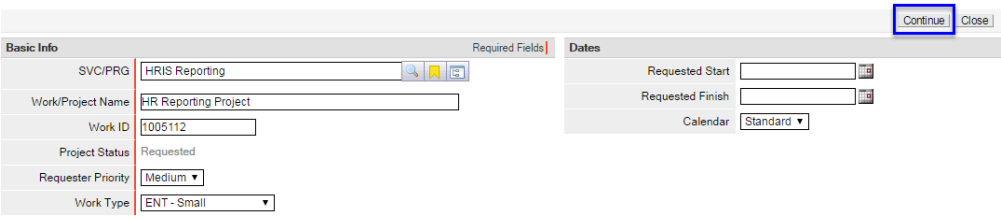


See the **Planview Work Types** tip sheet for more information about classifying project/program types.

6. Select the **Requested Start** and **Requested Finish** dates for your project (if known).

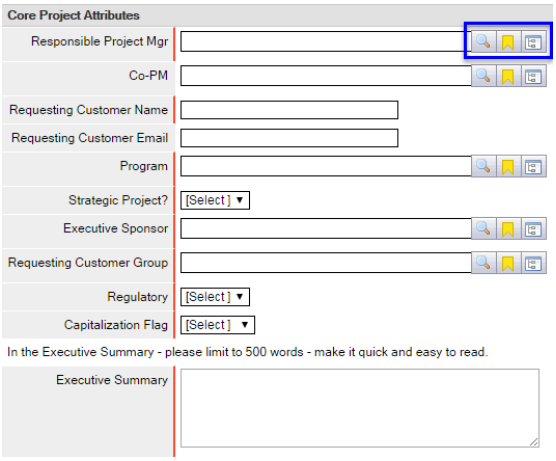


7. Click **Continue** to proceed.

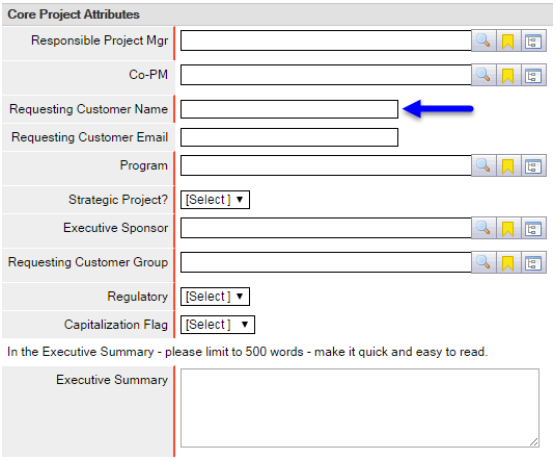


Complete Core Project Attributes

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

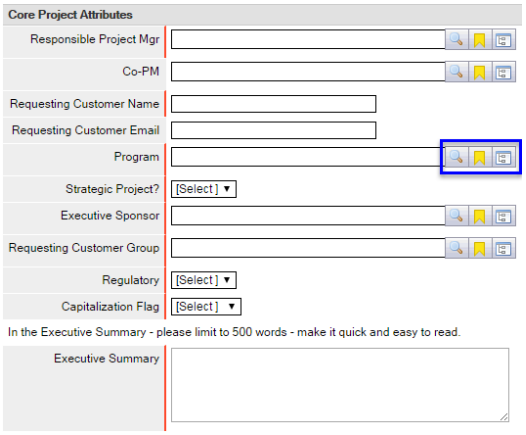


2. Complete **Requesting Customer Name** and **Requesting Customer Email** (if known).



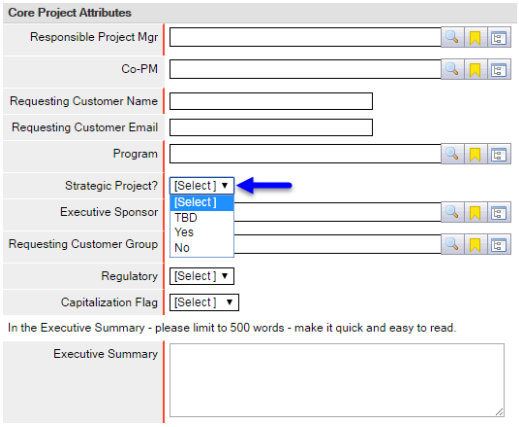
Note: For small projects, the project manager may be the requesting customer.

3. Use the magnifying glass, bookmark, or data picker process to select the **Program** with which this project is associated.

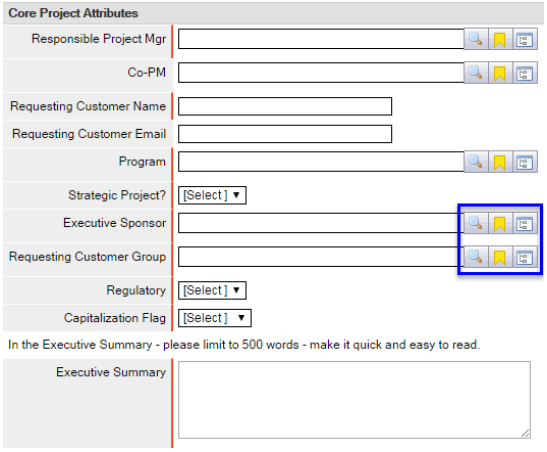


Note: If you do not see the program name listed, please email the EPMO team for assistance.

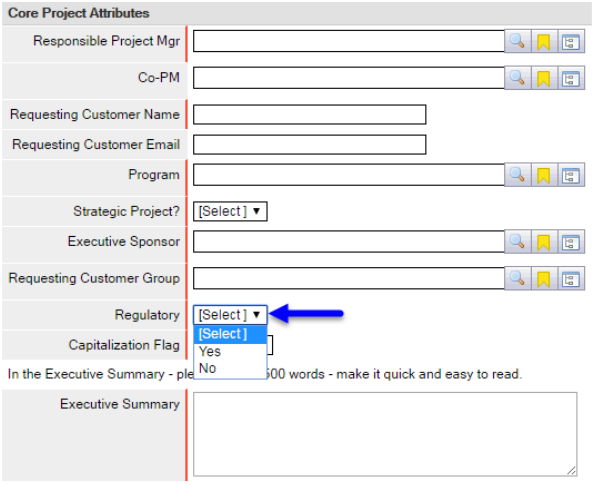
4. Select an option from the **Strategic Project?** dropdown menu. If unknown, select TBD.



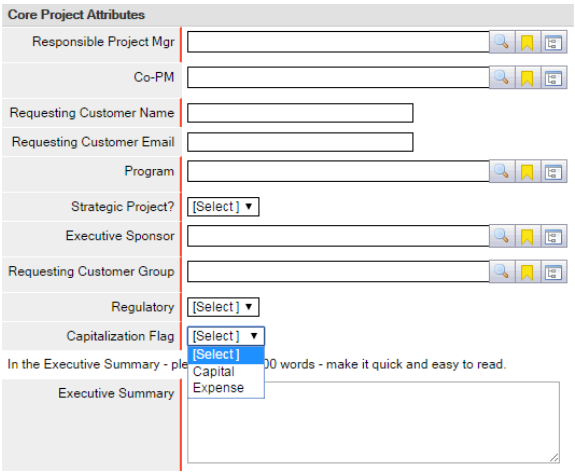
5. Use the magnifying glass, bookmark, or data picker to select the **Senior Executive Sponsor** and **Requesting Customer Group** for your project.



6. Use the dropdown menu to select if your project is **Regulatory** in nature.

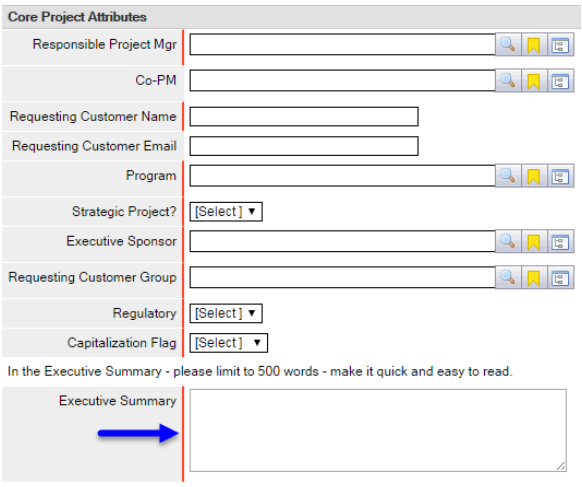


7. Use the dropdown to select a **Capitalization Flag**.



Rule of thumb for determining capitalization: If your project has a budget for new equipment or labor-related costs (e.g. approved new FTEs, software or hardware purchases, unusual supply costs, etc.), then choose Capital. If you will use existing resources, choose Expense.

8. Complete the **Executive Summary** for your project. Please limit to 500 words or fewer.



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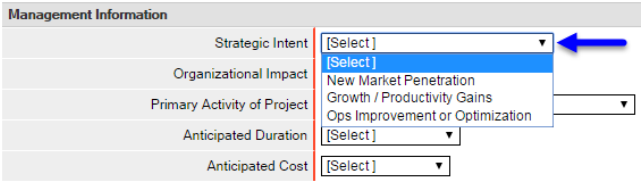
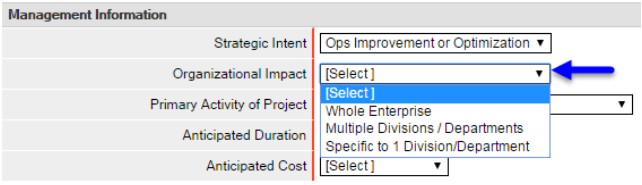
Complete Management Information

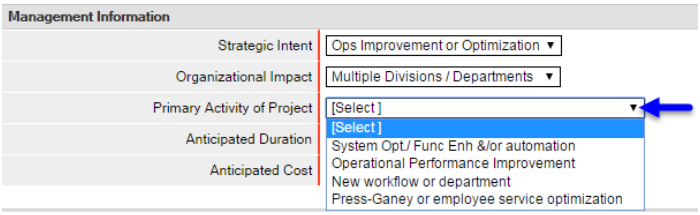
1. Use the dropdown menu to select the **Strategic Intent** of your project.



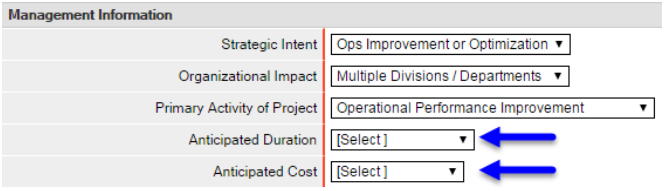
2. Use the dropdown menu to select **Organizational Impact**.



3. Use the dropdown menu to select **Primary Activity of Project**.

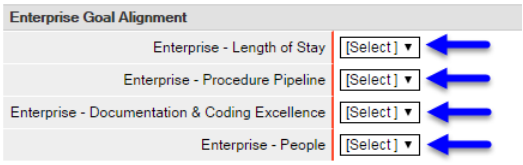


4. Use the dropdown menus to select the **Anticipated Duration** and **Anticipated Cost** of your project.



Complete Enterprise Goal Alignment

1. Select Yes or No from the drop-down menus in this section to indicate the strategic goals with which your project is aligned.



Note: These goals will be updated annually to reflect the current business goals of the VUMC enterprise.

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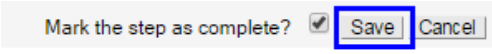
Complete Pillar Goal Alignment

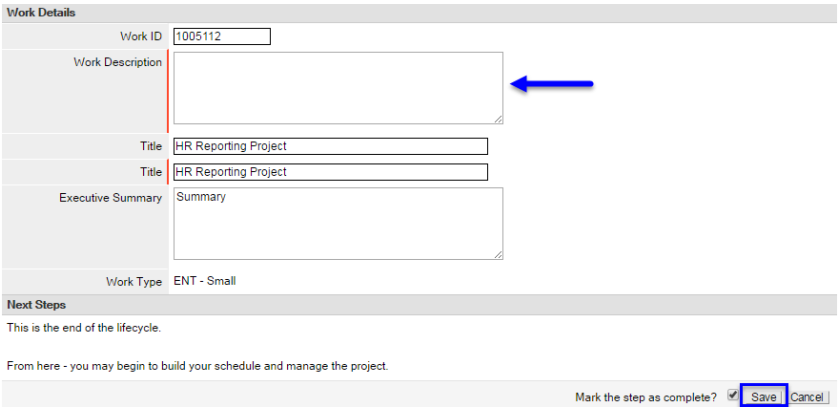
1. Select Yes or No from the drop-down menus in this section to indicate the Pillar(s) with which your project is aligned.

2. Click **Save** to proceed.



Complete Work Details

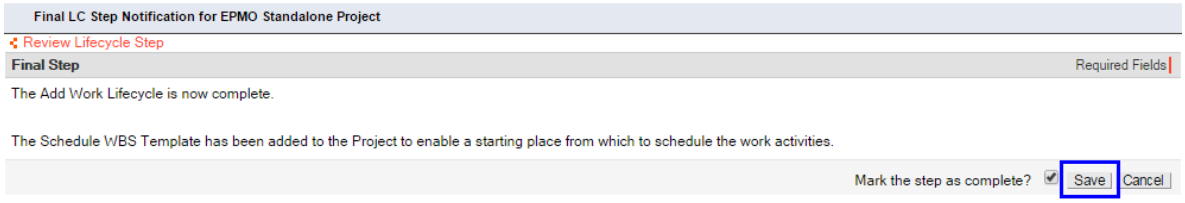
1. Enter **Work Description** for your project.



2. Click **Save**.

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.