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.

For additional support, please visit the EPMO website.
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.
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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.
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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).

   ![Core Project Attributes]

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

For additional support, please visit the [EPMO website](#).
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3. Use the magnifying glass, bookmark, or data picker process to select the **Program** with which this project is associated.

   ![Program Selection](image)

   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.

   ![Strategic Project Selection](image)

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

   ![Senior Executive Sponsor Selection](image)

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For additional support, please visit the [EPMO website](#).

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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.

   ![Strategic Intent dropdown](image)

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

   ![Organizational Impact dropdown](image)

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

   ![Primary Activity dropdown](image)

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

   ![Anticipated Duration and Cost](image)

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.

   ![Enterprise Goal Alignment](image)

   **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.