# Quick Guide:

# Value-Creating Project Entry & Updating Checklist

## This checklist serves TWO purposes:

1. Fields that should be entered into Planview upon the creation of a project.
2. Key project updates done by the PM on a regular basis (as applicable, daily, weekly, monthly)

**VUMC, Project MANAGER, & Team benefits:**

1. One source for project status
2. Help the project team track its progress and meet its goals
3. Provide data to senior executives who need project information to make strategic decisions pertaining to VUMC as a whole

**Creating Your Project – Enter:**

Is this project part of an existing program – Choice

Project Name

Priority

Type of Project – Choice

If known, Start & Finish Date

Project Manager

Requesting Customer

Executive Sponsor – Choice

Requesting Customer Group – Choice

Regulatory – Choice

Capital Budget – Choice

Executive Summary – Free text, high level summary of scope

Project General Information - Choice: Strategic Intent, Organizational Impact, Primary “Activity”, Anticipated Duration, Anticipated Cost

Fiscal Year Goal Alignment – Choice

Pillar Goal Alignment – Choice

Work (Project) Description

*YOUR PROJECT IS NOW CREATED:* ***NEXT ENTER PROJECT TASKS*** *(WORK & RESOURCE MANAGEMENT INFO)*

Project phase, tasks, milestones, dates, dependencies, and resources as applicable

**updating your project regularly!**

***Keep your high level project information up to date:***

Project phase, tasks, milestones, dates, % complete

Changes, Risks, Issues

Project Status Summary: Manager Assessment, Phase, Key Updates, Accomplishments & Planned Activities

For additional quick reference Planview project entry information, please reference the EPMO Website: [VUMC – Specific Job Aids](http://www.mc.vanderbilt.edu/root/vumc.php?site=epmo&doc=48401)

To contact the EPMO – send an email to [vumc.epmo@vanderbilt.edu](mailto:vumc.epmo@vanderbilt.edu)