Planview Request Guide
Introduction

All staff with full-user licenses have the ability to request a project; however, these requests are typically completed by project managers as well as some resource managers. When requesting a project the steps are as follows:

1. Make a new request
2. Submit a Statement of Work (SOW)
   a. Note: If you do not need a SOW, you will submit a blank SOW Form.
3. Submit the Project Request Form

In addition to the changes in the process, there is also a new way to view your requests.

Step 1: Making a New Request

1. Log in to Planview.
2. Select Requests on the top navigation menu and then New.

Step 2: Submitting the Statement of Work (SOW)

1. Enter the project title in the Basic Details section.

   a. If you need a SOW, complete this section.
      i. Note: If needed, the SOW can be saved without submitting by clicking Save in the top left corner of the form.
   b. If you do not need a SOW, you do not have to complete this section.

3. Click Submit.
4. The PPMO will receive an email notification of the submitted SOW.
5. The PPMO will send an email prior to the intake meeting to inform the group which SOWs will be reviewed.
6. Once the SOW is reviewed, you will receive an email notification from the PPMO.

**Step 3: Requesting a Project**

1. You will receive an email notification with a link to access the Project Request Form; click the link.

   ![Email Notification](image)

   **Email Content:**
   
   Tue 4/2/2019 9:09 AM
   
   alert_innotas@innotas.com
   
   Request approved at gate Project Proposals
   
   To: Thomas, Melorie
   
   The request below has received an approval at the Project Proposals gate by Knopf, Natalie
   
   “SOW is reviewed. Please fill out project request form.”

   ![Email Body](image)
2. Enter the required Project Request Information and then click **Save**.

3. Email ppmo@wustl.edu to notify the PPMO the project is ready for review and approval.
   a) The PPMO will be checking requests daily.

4. The PPMO department will send a notification email that your project is approved.
New Request View

When viewing your requests, you now have an additional view, called Card View. The List View is still available as well.

1. New Card View: The Card View is a “Kanban” board that provides a visual workflow.

2. Existing List View: The List view hasn’t changed and is similar to other entity grid views.