Pre-Planning Checklist – Select and Edit

Roles:	Project Manager, Project Manager Assistant
Project Status:	Pre-Planning

Select the Pre-Planning Checklist Type	
Step	**Task**
1.	Click the drop-down next to *Go To…* and select **Project Data Summary**.
2.	Scroll to the bottom of the page and click the **Edit Project** command button.
3.	In the *Pre-Planning Details* section, click the drop-down under **Pre-Planning Checklist Type**; select **Short Checklist** or **Long Checklist**.
4.	Click the **Continue** command button.
5.	Click the **Back** command button to edit the details.
6.	Click the **Confirm** command button.

Edit the Pre-Planning Checklist	
Step	**Task**
1.	Click the drop-down next to *Go To…* and select **Project Data Summary**.
2.	Scroll to the bottom of the page and click the **Pre-Planning Checklist** command button.
3.	Click the **Edit Checklist** command button.
4.	Select any items that have been completed.
5.	Enter any notes in the *Comments* field.
6.	Click the **Save** command button.

Additional Information
- The pre-planning checklist can be exported as an Excel spreadsheet or as a PDF.