PSEE Change Management Module

Contents

Change Management Module 4
Requesting Privileges for the Change Management Module 4
Change Request Packages 5
Creating a Change Request Package 5
Removing a Change Request Package 6
Viewing a Change Request Package 7
Overview Information 8
Editing Overview Information 8
Submitting a Change Request Package 9
Revising a Change Request Package 10
Placing a Change Request Package on Hold 11
Withdrawing a Change Request Package 12
Resubmitting a Change Request Package 13
Providing Clarification for a Change Request Package 13
Rejecting a Change Request Package 14
Resuming a Change Request Package 15
Impact Area Information 15
Scope Summary Impact Area 17
Adding the Scope Summary Impact Area 17
Adding Scope Elements 19
Removing Scope Elements 20
Modifying Scope Elements 21
Funding Impact Area 22
Adding the Funding Impact Area 22
Adding a New Funding Request 24
Removing a New Funding Request 32
Modifying a New Funding Request 33
Critical Schedule Impact Area 35
Adding the Critical Schedule Impact Area 35
Modifying Critical Dates 36

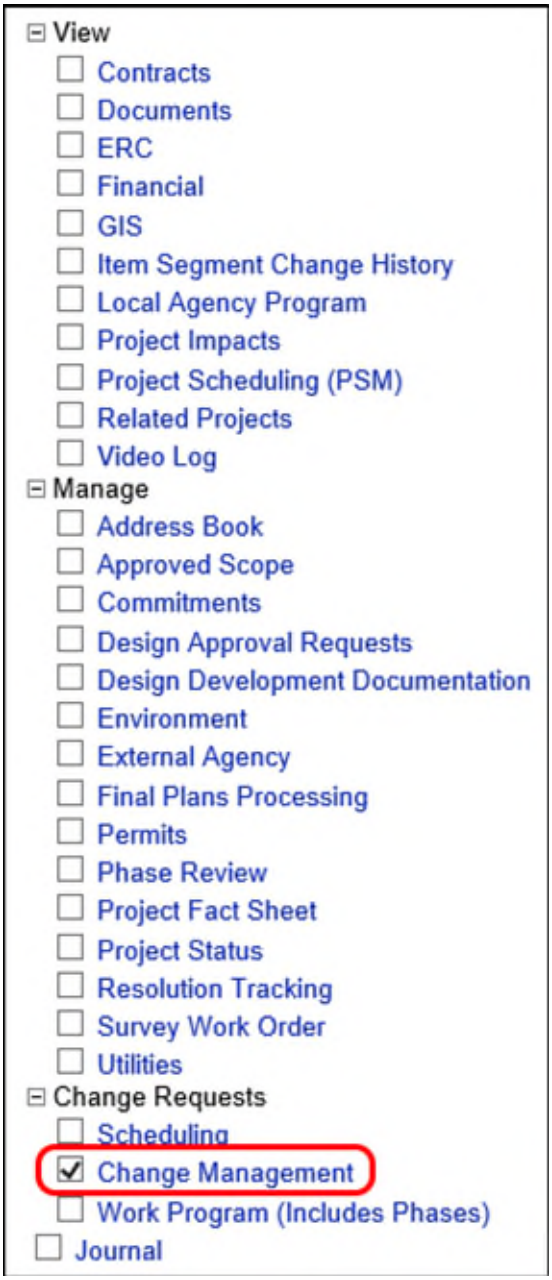
Project Info Impact Area 38
Adding the Project Info Impact Area 38
Modifying Item Segment Information 39
Editing Item Segment Comments 40
Removing Item Segment Comments 41
Adding a Road 42
Editing a Road 43
Adding a Trail 44
Editing a Trail 45
Adding an Airport 46
Editing an Airport 47
Adding a Seaport 48
Editing a Seaport 49
Adding a Bridge 50
Adding a Transit System 51
Editing a Transit System 52
Removing a Location 53
Viewing Location Comments 54
Adding a Location Comment 54
Editing a Location Comment 55
Removing a Location Comment 56
Viewing Location Work Mixes 57
Adding a Location Work Mix 57
Editing a Location Work Mix 58
Removing a Location Work Mix 59
Modifying Description Information 60
Adding an Item Segment Group 61
Removing an Item Segment Group 62
Reviewer Assignments 63
Editing Assignments 64
Adding an Assignment 64
Removing an Assignment 65
Reordering Assignments 66

Adding Comments 67
Requesting Changes 67
Requesting Clarification 68
Approving 69
Rejecting 70
FYI Assignments 70
Adding an FYI Assignment 70
Editing an FYI Assignment Comment 71
Removing an FYI Assignment 72
Change Package Documents 72
Adding a Document 72
Editing a Document 73
Removing a Document 74
Change Package Comments/History 74
Adding a Comment 75
Removing a Comment 75
Adding a Response 76
Viewing Response Documents 77
Editing a Response 77
Adding Documents to a Response 78
Removing a Response. 79

Change Management Module

The Change Management module allows authorized users to create, view, and process change request packages and move them through their lifecycle in a particular order. A change request package may include one or more impact areas: Scope Summary, Critical Schedule, Funding, and Project Info.

In order to view the Change Management Module, check the "Change Management" checkbox in the Module Menu on the Project page.

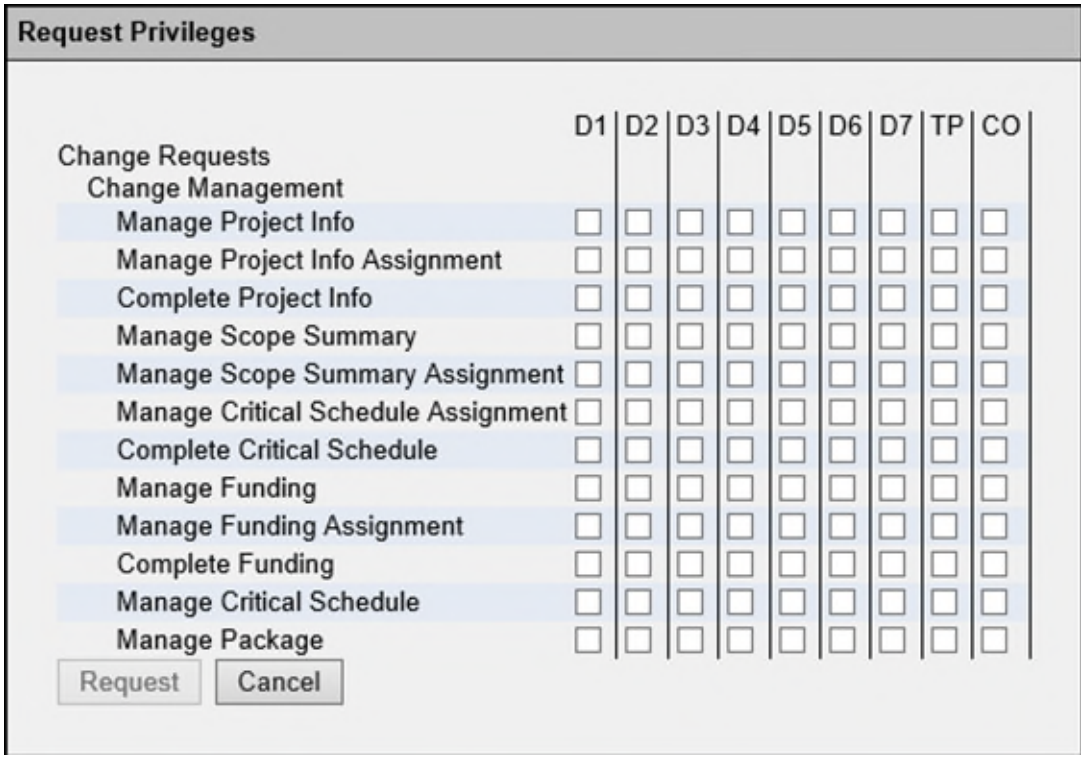


Requesting Privileges for the Change Management Module

As a PSEE User, you may request access/privilege to a specific activity within the Change Management Module through PSEE. This request will be sent to the District Administrators. (The District

Administrators are listed in the footer of every PSEE page.) For information on how to request access to specific activities within a Module, see User Profile – Privileges and Notifications.

Below are the activities that can be granted privilege in the Change Management Module. Place a check in the box beside the activity access/privilege being requested in the column appropriate for your District. Click "Request" to send the request to the District Administrator for action.



Request Privileges

	D1	D2	D3	D4	D5	D6	D7	TP	CO
Change Requests									
Change Management									
Manage Project Info	☐	☐	☐	☐	☐	☐	☐	☐	☐
Manage Project Info Assignment	☐	☐	☐	☐	☐	☐	☐	☐	☐
Complete Project Info	☐	☐	☐	☐	☐	☐	☐	☐	☐
Manage Scope Summary	☐	☐	☐	☐	☐	☐	☐	☐	☐
Manage Scope Summary Assignment	☐	☐	☐	☐	☐	☐	☐	☐	☐
Manage Critical Schedule Assignment	☐	☐	☐	☐	☐	☐	☐	☐	☐
Complete Critical Schedule	☐	☐	☐	☐	☐	☐	☐	☐	☐
Manage Funding	☐	☐	☐	☐	☐	☐	☐	☐	☐
Manage Funding Assignment	☐	☐	☐	☐	☐	☐	☐	☐	☐
Complete Funding	☐	☐	☐	☐	☐	☐	☐	☐	☐
Manage Critical Schedule	☐	☐	☐	☐	☐	☐	☐	☐	☐
Manage Package	☐	☐	☐	☐	☐	☐	☐	☐	☐

Request Cancel

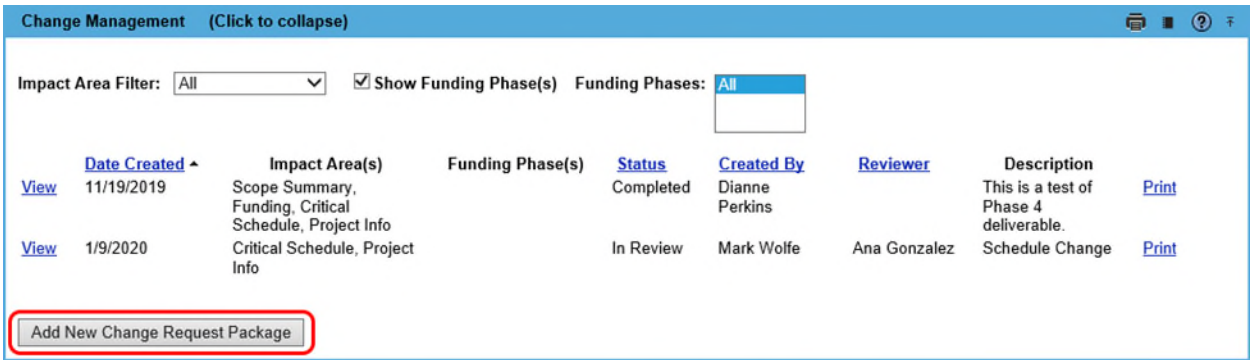
Note: When access/privilege is granted, it is for all projects within that District. When assigned as the PSEE Project Manager, you automatically receive access to certain privileges for your projects only.

Change Request Packages

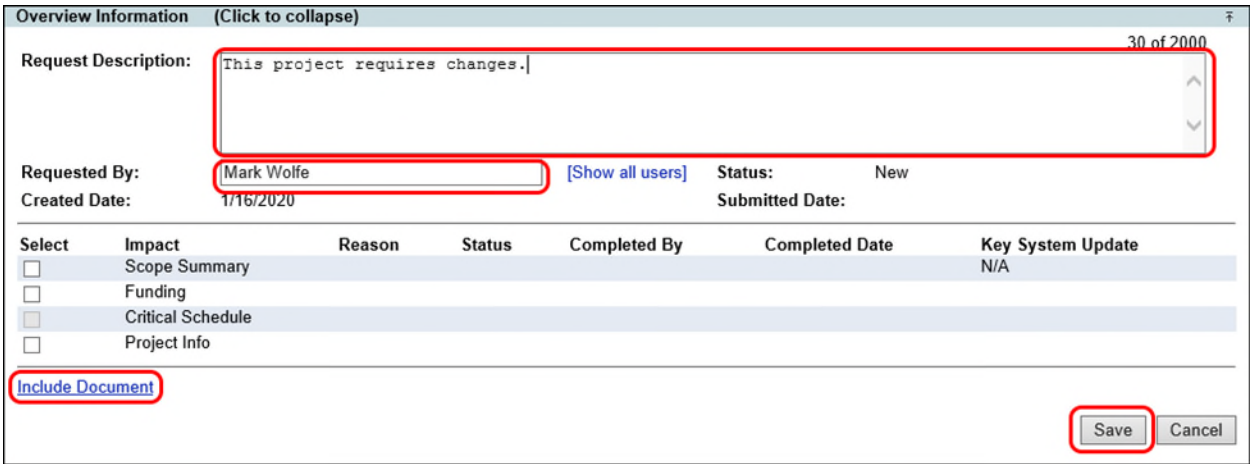
Creating a Change Request Package

To create a Change Request Package, follow these steps:

1. Click the "Add New Change Request Package" link. This creates an empty Change Request Package.



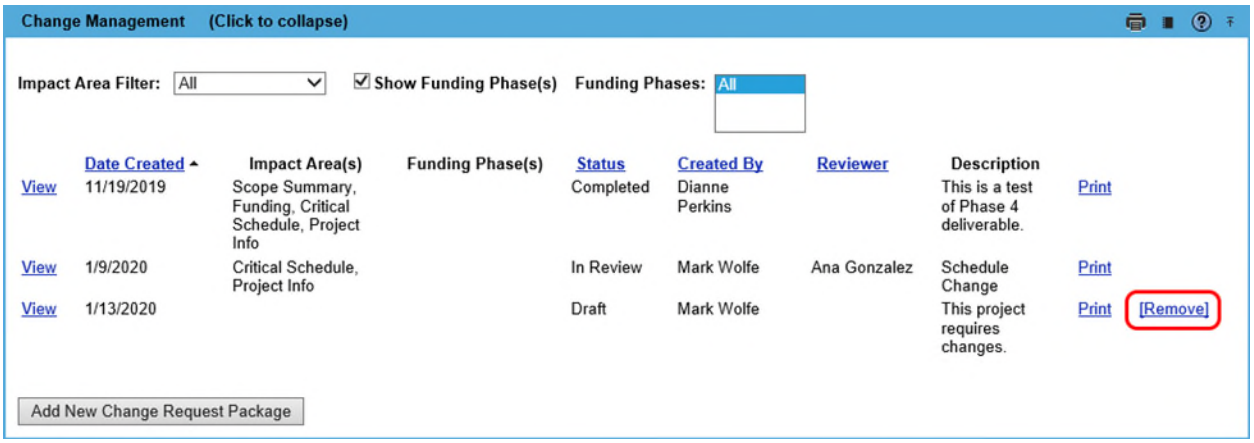
2. Enter the Request Description for this Change Request Package. This field is required.
3. By default, the Requested By field will be populated with the current user. If another user requested this Change Request Package, begin typing their name in the text box, and select their name from the dropdown list.
4. If desired, click the Include Document link to add an initial document to the Change Request Package.
5. Click "Save" to create the Change Request Package, or "Cancel" to cancel the operation.



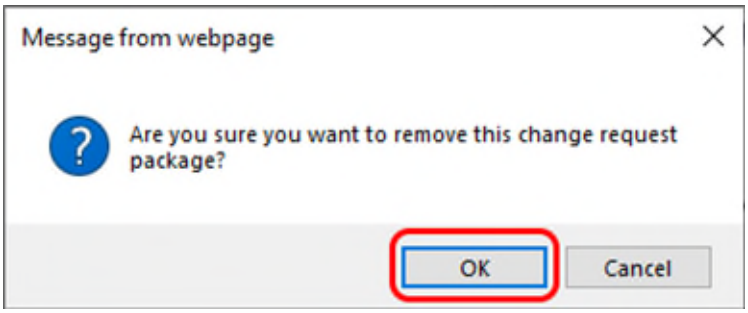
Removing a Change Request Package

To remove a Change Request Package, follow these steps:

1. Click on the "Remove" link next to the Change Request Package that you wish to remove. This will open a confirmation dialog



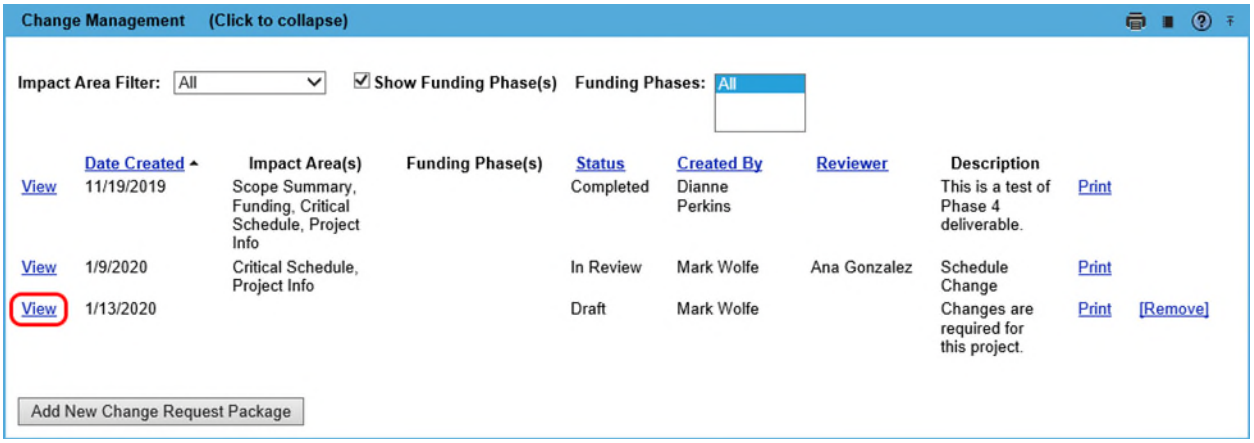
2. Click "OK" to remove the Change Request Package, or "Cancel" to cancel this action.



Note: A Change Request Package may only be removed if the status is in Draft or Revision. Once a package has been submitted, this option is no longer available.

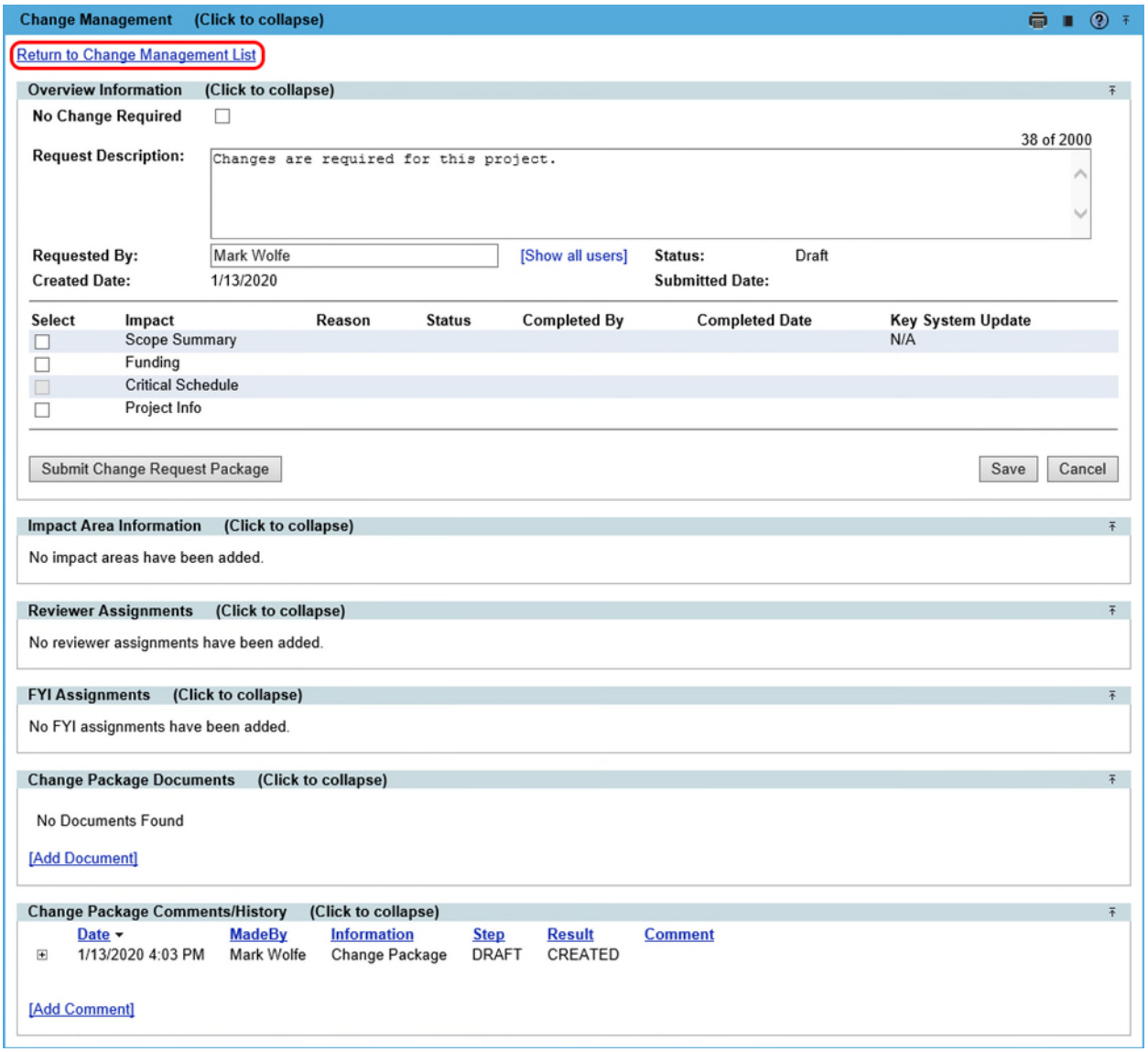
Viewing a Change Request Package

You may view a Change Request Package by clicking the "View" link next to the desired Change Request Package in the list.



The Change Request Package includes Overview Information, Impact Area Information, Reviewer Assignments, FYI Assignments, Change Package Documents, and Change Package Comments/History. To

return to the list of Change Request Packages, click on the “Return to Change Management List” link in the top left corner of the module.



Note: A newly created Change Request Package will have a status of “Draft”.

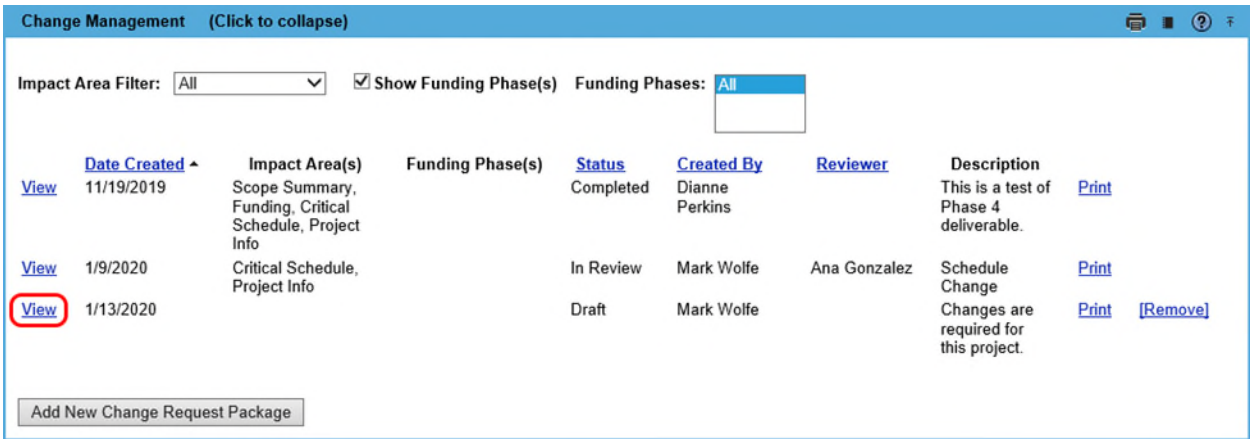
Overview Information

A Change Request Package contains an Overview Information panel that displays general information for the Change Request Package. The Overview Information Panel allows the user to edit basic information about the Change Request Package in addition to performing specific actions on the Change Request Package, i.e. submitting, revising, placing on hold, withdrawing, resubmitting, providing clarification, resuming, and rejecting.

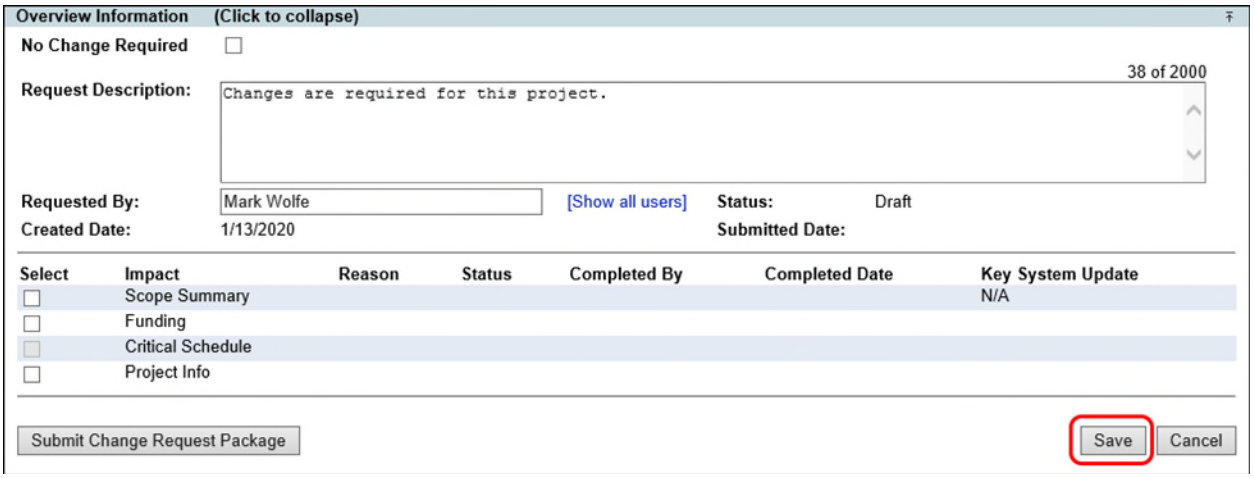
Editing Overview Information

To edit the Overview Information for a Change Request Package do the following:

1. Click the "View" link next to the desired Change Request Package in the Change Management list.



2. Update the Request Description, Requested By user, or add and remove Impact Areas to the Change Request Package. Click "Save" to save the changes, or "Cancel" to cancel the operation.



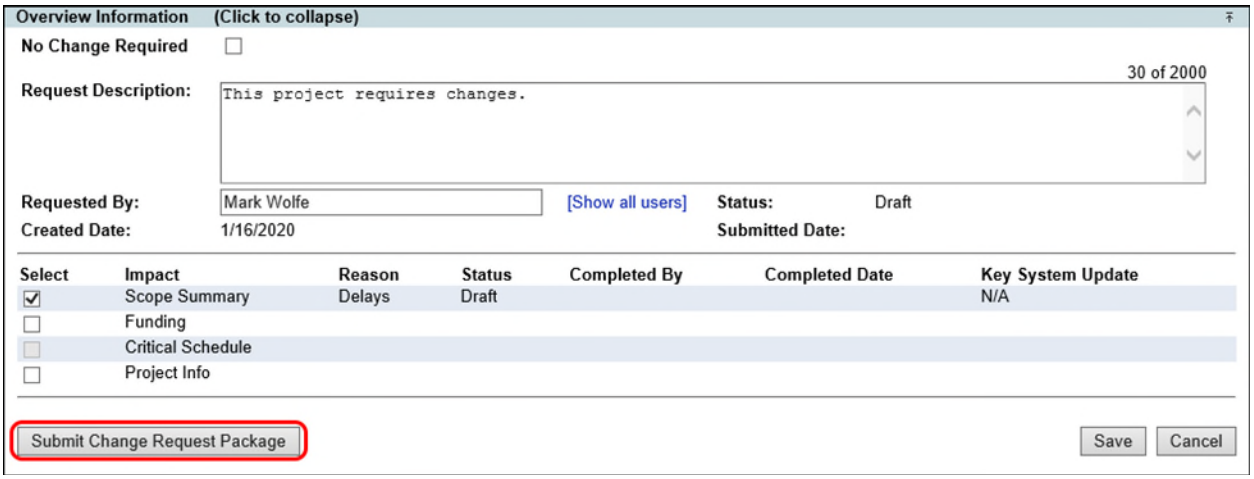
Note: A Change Request Package will only be editable if the status of the Change Request Package is Draft or Revision and the user is the Project Manager or Backup Project Manager for the selected project.

Submitting a Change Request Package

When a Change Request Package is set up satisfactorily, it may be submitted for review. Once submitted, the status of the Change Request Package is set to In Review and the review process is initiated.

At this point, users will be unable to edit the Change Request Package. But, depending on the stage of the review process and/or actions taken, the status of the Change Request Package may change, and it may become editable again.

To submit a Change Request Package, click "Submit Change Request Package".



Note: To submit a Change Request Package, it must be in "Draft" mode, and the user must be a Project Manager, Backup Project Manager or privileged user.

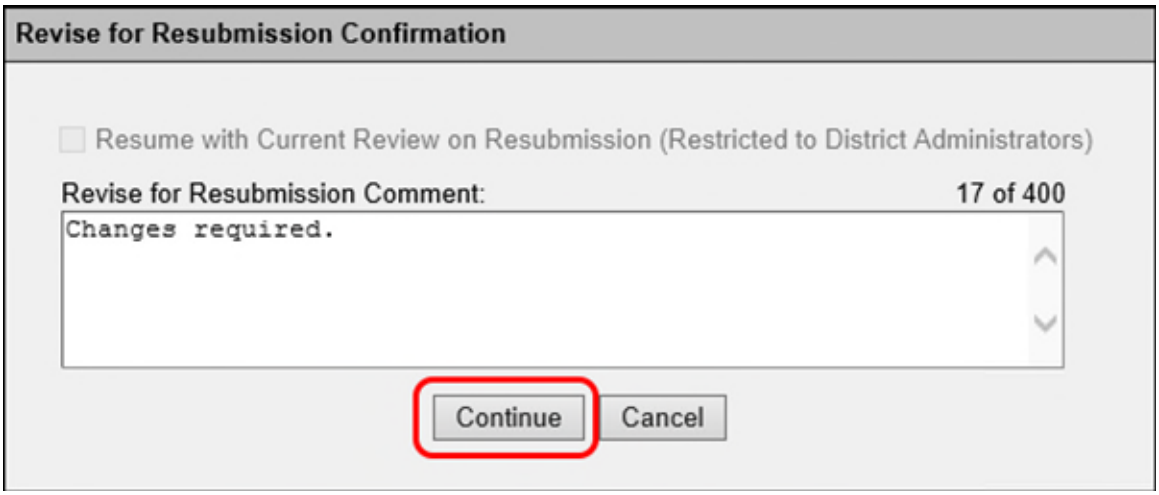
Revising a Change Request Package

When revisions are required, a Change Request Package may be modified by a privileged user. This will set the status of the Change Request Package to "Revision" and reset all reviewer assignments. After revisions are made, the user may resubmit the Change Request Package again for review.

To revise a Change Request Package, follow these steps:

1. Click "Revise for Resubmission (Status = Revision)". This will open the "Revise for Resubmission Confirmation" dialog.

2. Enter a comment.
3. Click "Continue" to confirm, or "Cancel" to cancel the operation.



Note: To revise a Change Request Package, the status must be "In Review", "Approved", or "Withdrawn", and the user must be a Project Manager, Backup Project Manager or privileged user.

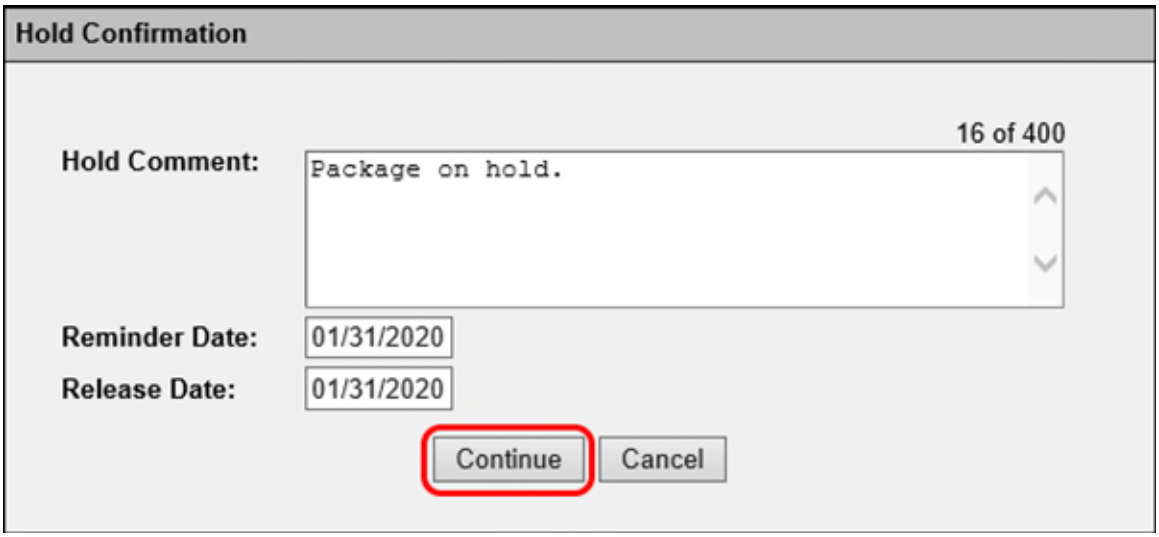
Placing a Change Request Package on Hold

A user may wish to place a Change Request Package on Hold. When a Change Request Package is placed on Hold, the status Changes to "On Hold", and the current reviewer assignment is set to "Pending". Optionally, the user may set a reminder date to receive an email reminder, and/or set a release to automatically release the "Hold" and resume the review process.

To place a Change Request Package on Hold, perform the following steps:

1. Click "Hold (Status = On Hold)". This will open the "Hold Confirmation" dialog.

2. Enter a "Hold Comment". This is a required field.
3. Choose a "Reminder Date". This field is optional.
4. Choose a "Release Date". This field is optional.



Note: To place a Change Request Package on hold, it must be "In Review", and the user must be a Project Manager, Backup Project Manager or privileged user.

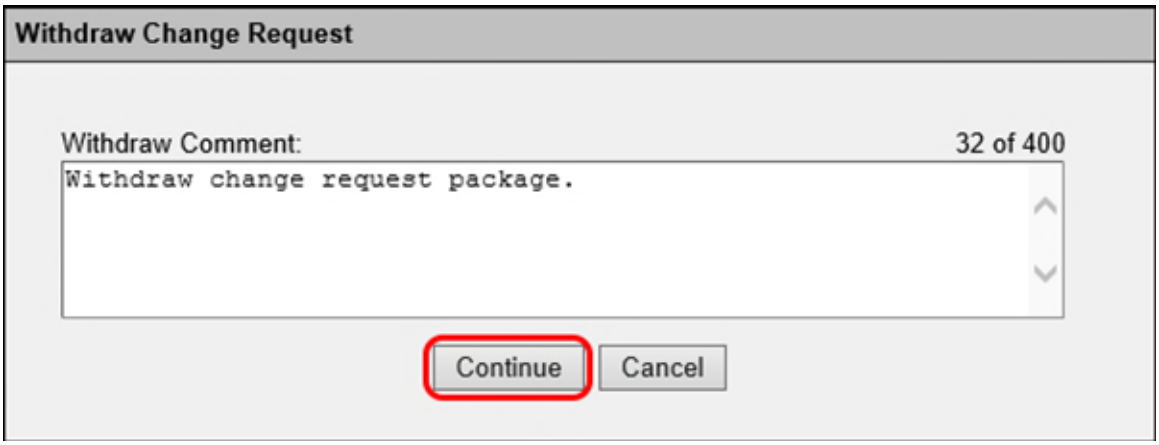
Withdrawing a Change Request Package

A user may choose to withdraw a Change Request Package. When a Change Request Package is withdrawn, its status is changed to "Withdrawn" and will no longer be editable. The associated reviewer assignments are set to "Closed" and it is taken out of the review cycle. If a user wishes to modify a "Withdrawn" Change Request Package, follow the earlier steps for "Revising a Change Request Package".

To withdraw a Change Request Package, follow these steps:

1. Click "Withdraw (Status = Withdrawn)". This will open the "Withdraw Change Request" dialog.

2. Enter a comment.
3. Click "Continue" to withdraw the Change Request Package, or "Cancel" to cancel the operation.

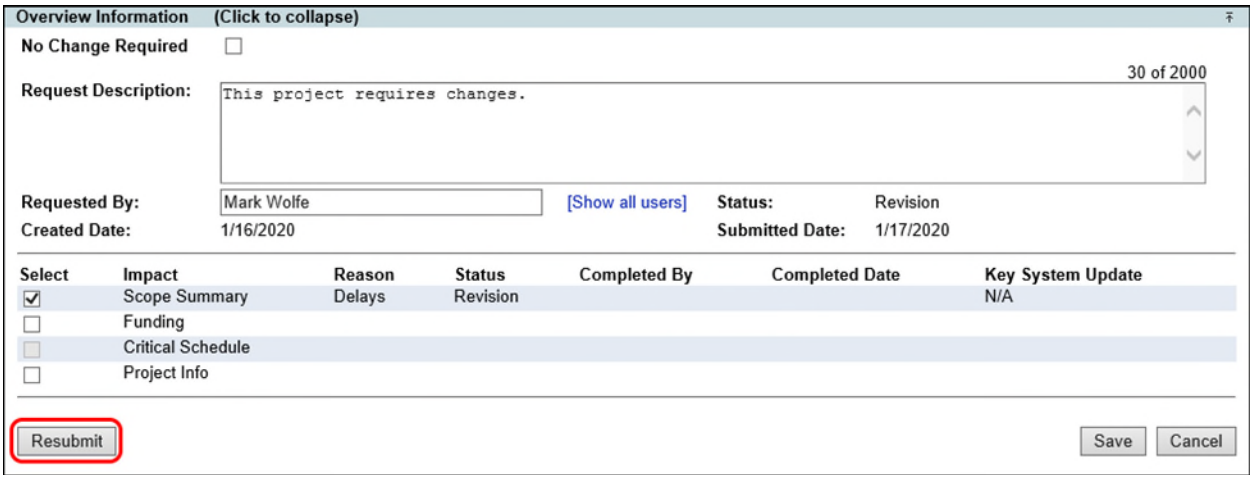


Note: To withdraw a Change Request Package, it must be "In Review", and the user must be a Project Manager, Backup Project Manager or privileged user.

Resubmitting a Change Request Package

When a Change Request Package has been revised and the necessary modifications have been made, a user may "Resubmit" the Change Request Package for review. When a Change Request Package is resubmitted the status of the Change Request Package is set back to "In Review" and the review process resumes with the next "Pending" assignment.

To resubmit a Change Request Package, click "Resubmit".



Note: To resubmit a Change Request Package, it must be in "Revision", and the user must be a Project Manager, Backup Project Manager or privileged user.

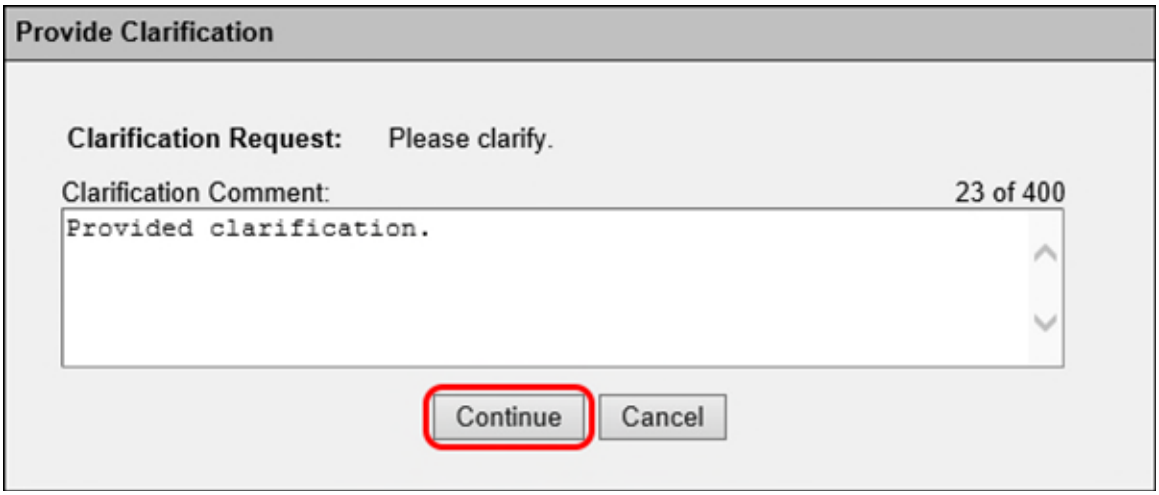
Providing Clarification for a Change Request Package

When a reviewer has requested clarification for a Change Request Package and the status is "Pending Clarification", a user may "Provide Clarification". Once the user has provided clarification, the Change Request Package is set back to "In Review" and the review process is resumed.

To provide requested clarification, perform the following steps:

1. Click "Provide Clarification". This will open the "Provide Clarification" dialog.

2. Enter a clarification comment. This field is required.
3. Click "Continue" to provide clarification and resume the review process, or "Cancel" to cancel the action.



Note: To provide clarification for a Change Request Package, it must be "Pending Clarification", and the user must be a Project Manager, Backup Project Manager or privileged user.

Rejecting a Change Request Package

Once a Change Request Package has been approved or it is pending clarification, a user may choose to reject the Change Request Package. When a Change Request Package is rejected, the status will be set to "Rejected" and all reviewer assignments will be set to "Closed".

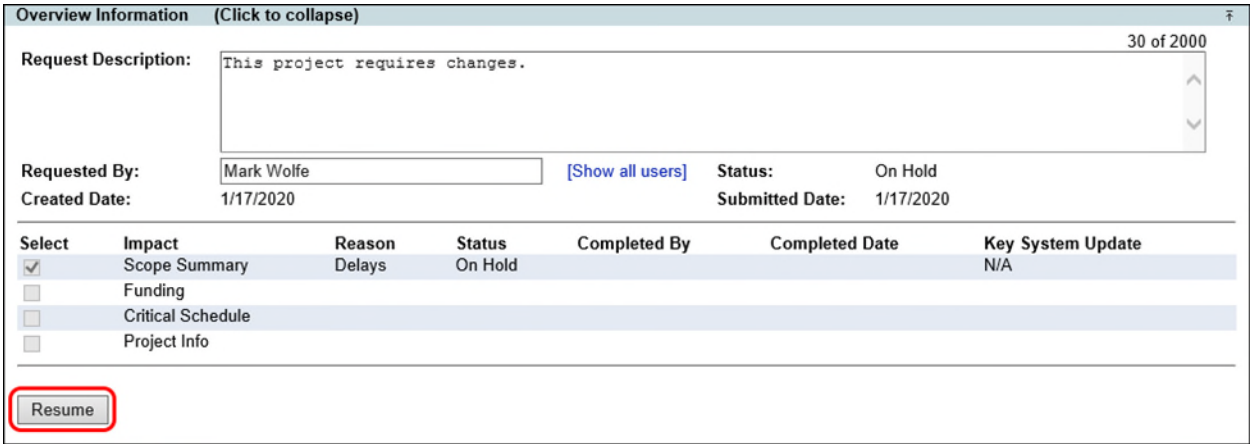
To reject a Change Request Package, click "Reject".

Note: To reject a Change Request Package, it must be "Approved" or "Pending Clarification", and the user must be a Project Manager, Backup Project Manager or privileged user.

Resuming a Change Request Package

When a Change Request Package has been placed on hold, a user may choose to "Resume" the Change Request Package. When a Change Request Package is resumed, the status is set to "In Review" and the review process is restarted with the next pending assignment.

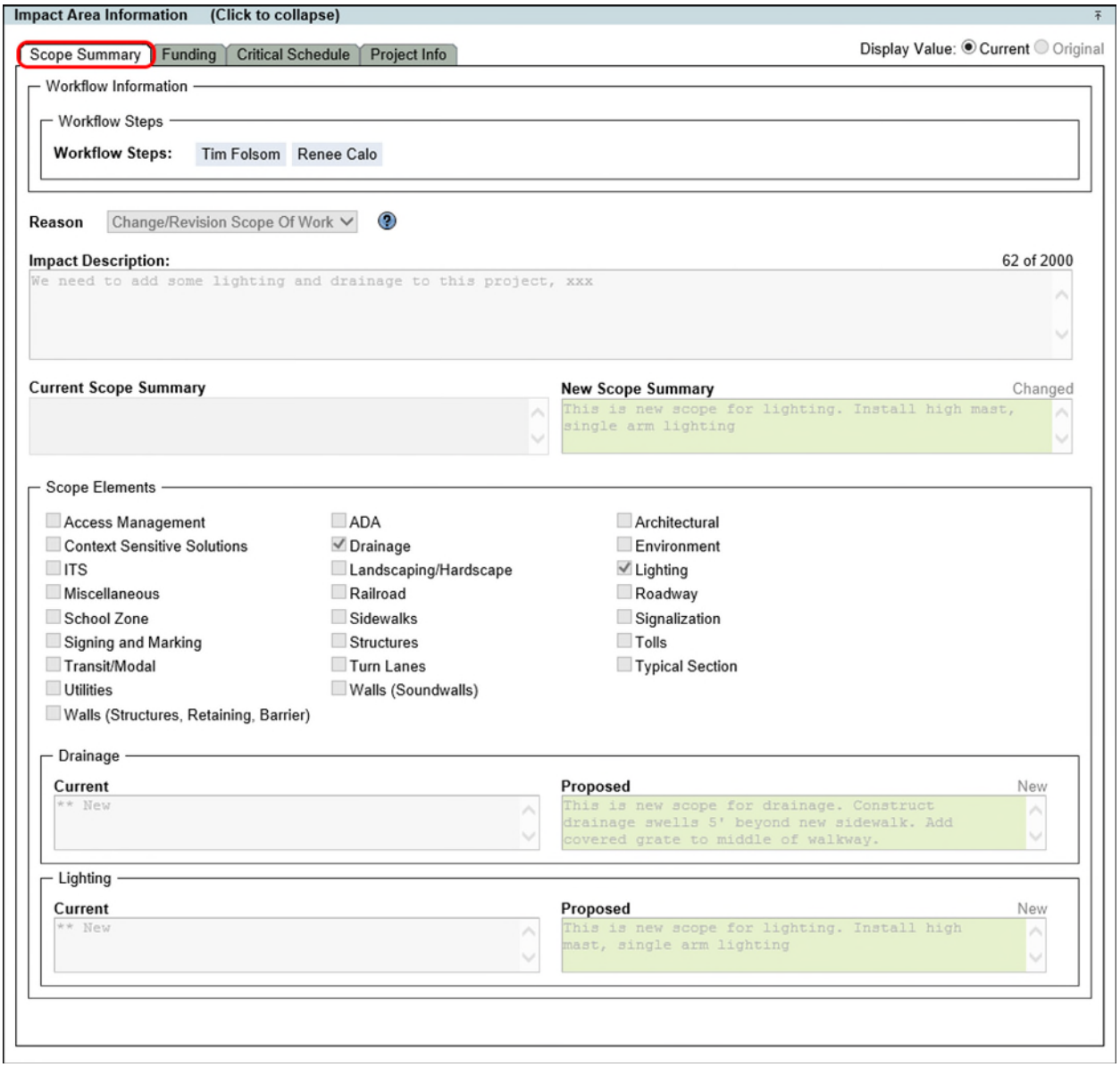
To resume a Project Change Package, click "Resume".



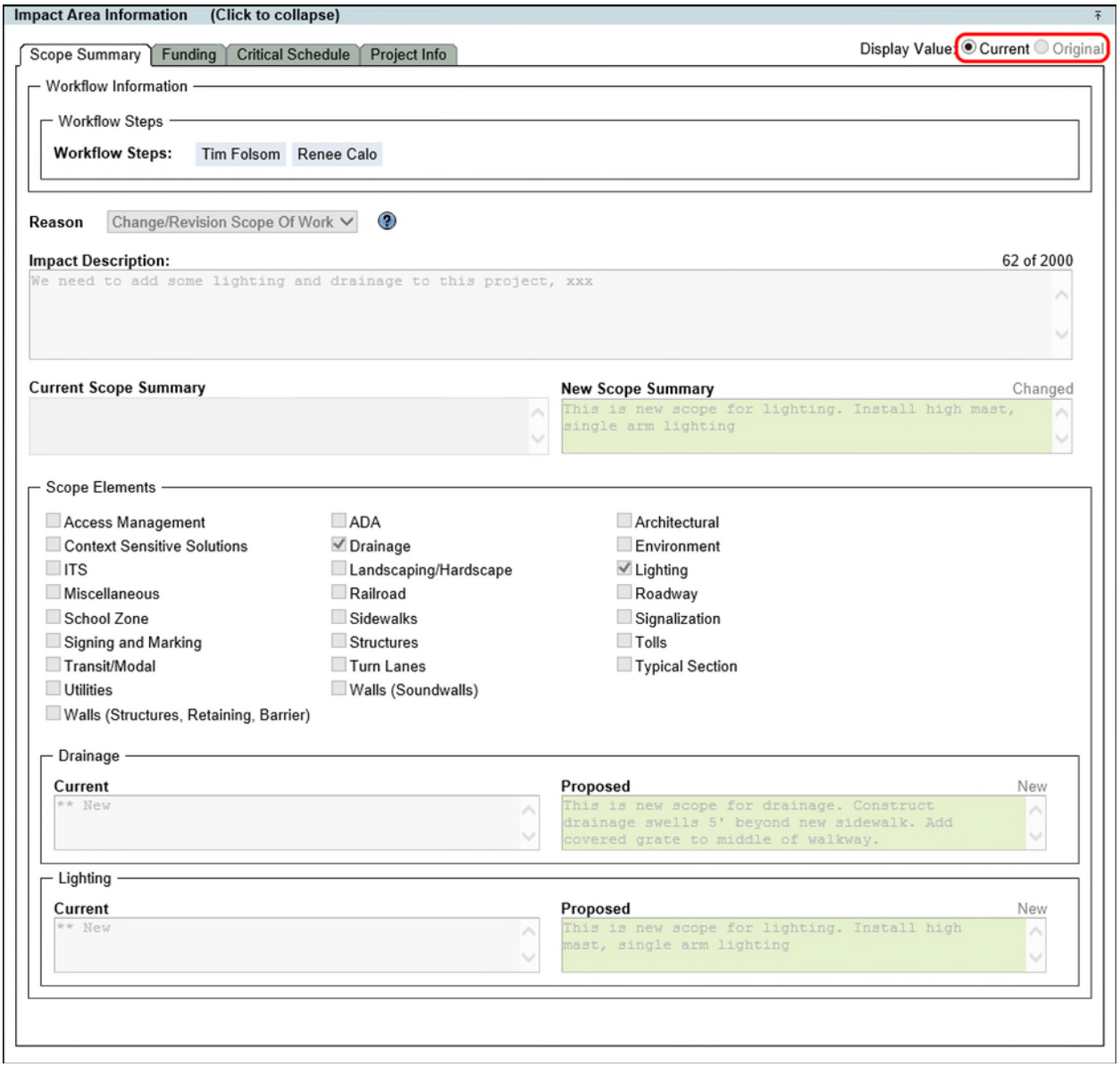
Note: To resume a Change Request Package, it must be "On Hold", and the user must be a Project Manager, Backup Project Manager or privileged user.

Impact Area Information

A Change Request Package will include change requests affecting one or more impact areas. The Impact Area Information panel details these changes. The four Impact Areas are Scope Summary, Funding, Critical Schedule, and Project Info. The included Impact Areas are defined in the Overview Information Panel. To view a particular Impact Area, click on the corresponding tab.



The Impact Area Information panel includes an option to display “Current” values, or “Original” values for each Impact Area. “Current” values are the current values associated with the project. “Original” values are the original values associated with the Change Request Package upon first submission. To toggle between these two sets of values, click either “Current” or “Original” at the top of the Impact Area Information panel.



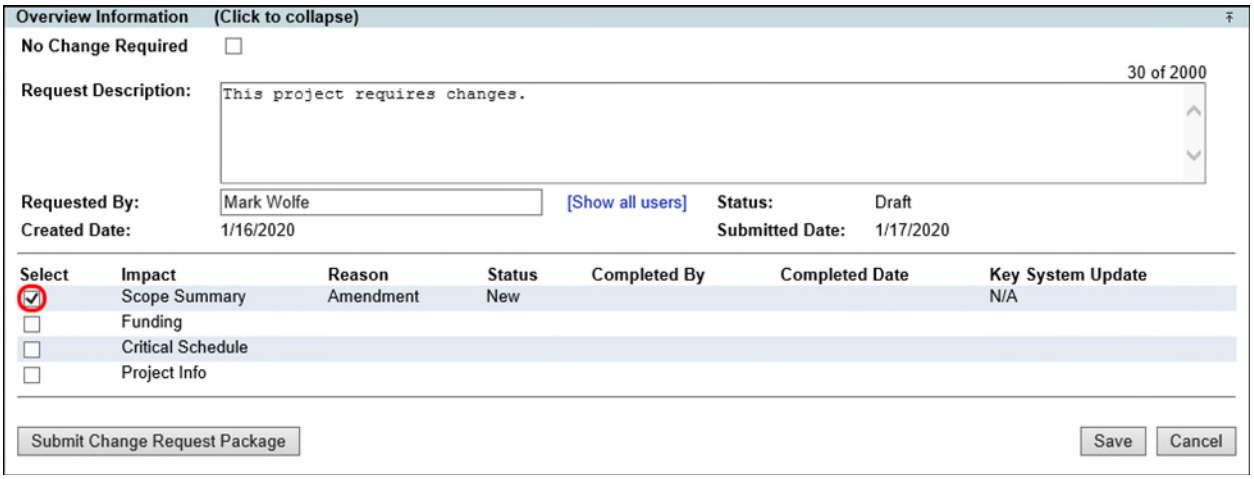
Scope Summary Impact Area

A Change Request Package may include changes to project scope. The Scope Summary tab within the Impact Area Information panel defines these changes. The user may propose changes to the "Scope Summary" in addition to adding, removing, or editing the associated "Scope Elements".

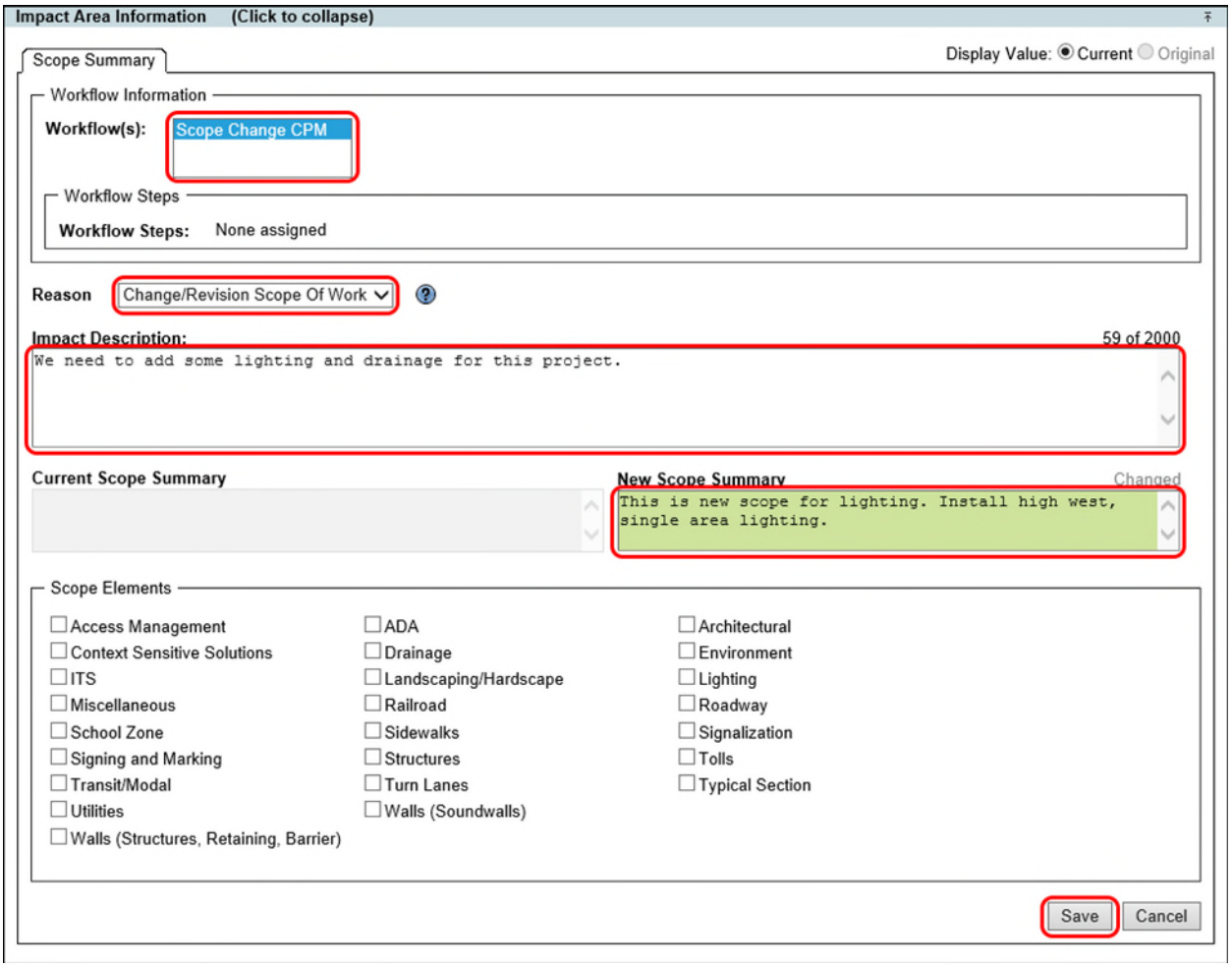
Adding the Scope Summary Impact Area

To add the Scope Summary Impact Area to the Change Request Package, follow these steps:

1. Within the Overview Information Panel click the checkbox next to "Scope Summary" in the list of Impact Areas. The Scope Summary tab will appear in the Impact Area Information panel.



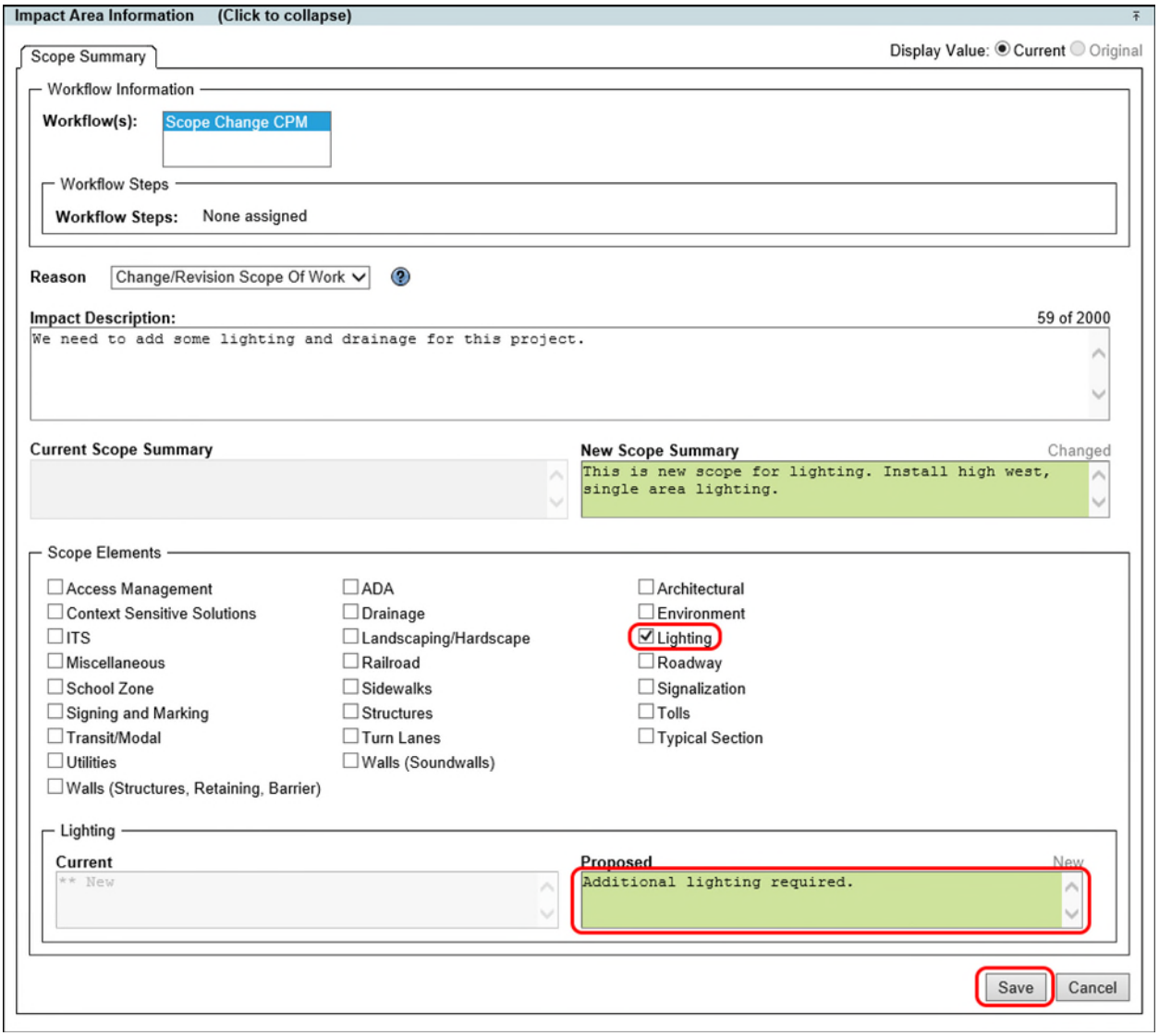
2. Select one or more workflows from the “Workflows” list. CTRL + click to include more than one workflow.
3. Select a reason for the change from the “Reason” dropdown list. This field is required.
4. Enter an “Impact Description”. This field is required.
5. Enter the “New Scope Summary”. This field is required.
6. Add, remove, or modify “Scope Elements”. (refer to the following sections)
7. Click “Save” to add the Scope Summary Impact Area, or “Cancel” to cancel the operation.



Adding Scope Elements

Additional Scope Elements may be required for the project. To add a “Scope Element”, follow these steps:

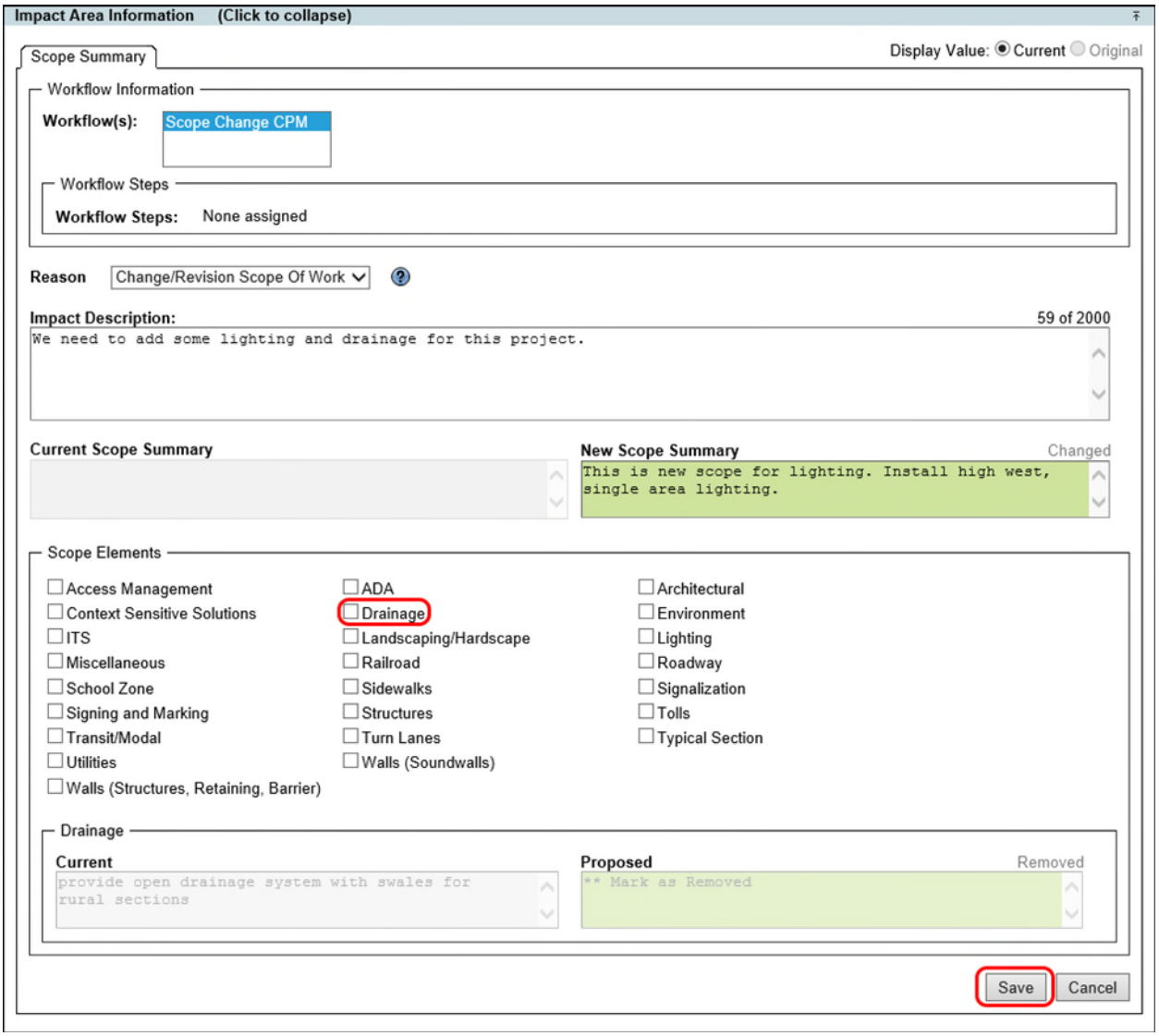
1. Check the corresponding checkbox.
2. Enter a description for the “Proposed” addition.
3. Click “Save” to save the changes, or “Cancel” to cancel the operation.



Removing Scope Elements

An existing Scope Element may no longer be required for the project. To remove a “Scope Element”, follow these steps:

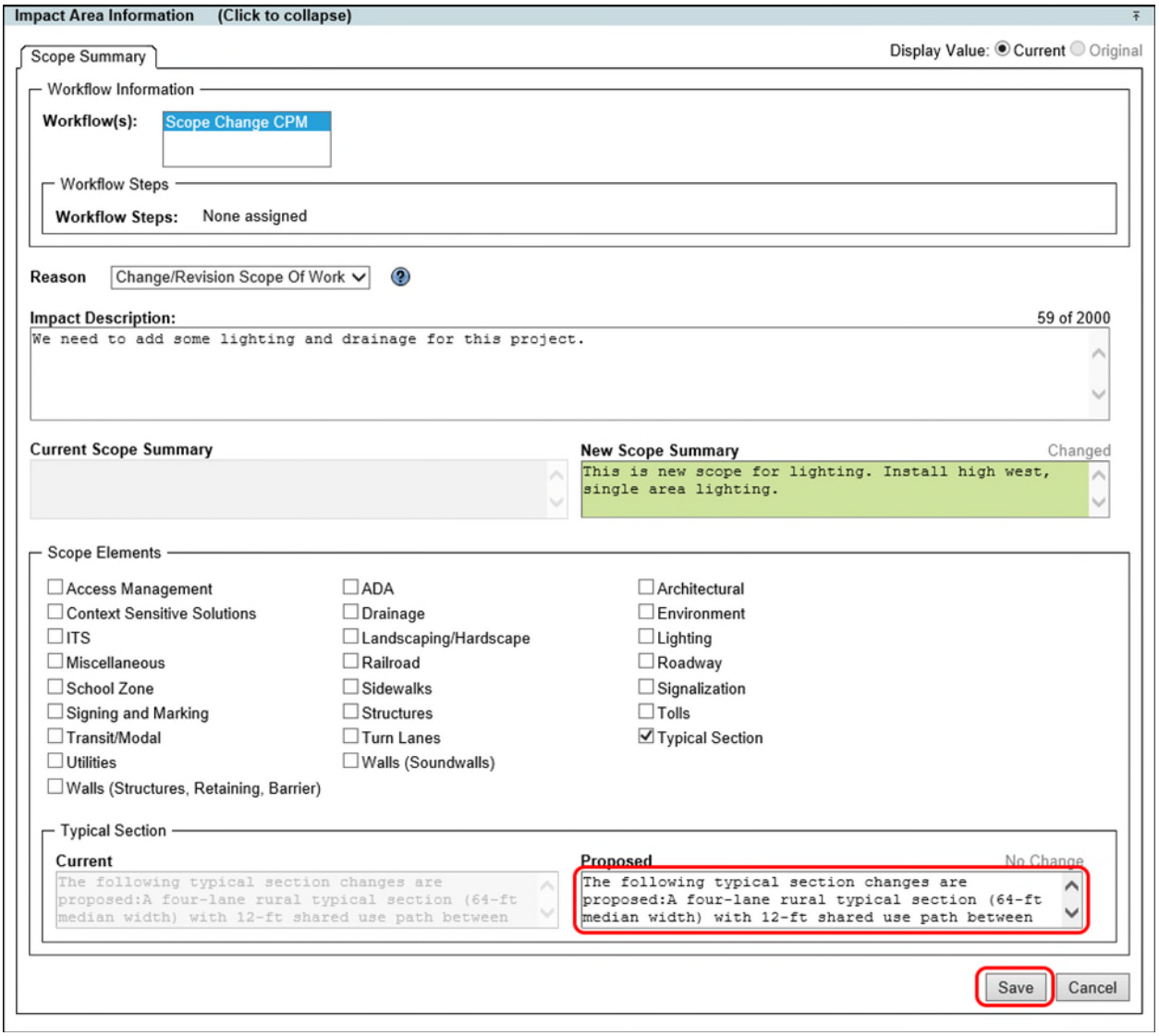
1. Uncheck the corresponding checkbox.
2. Click “Save” to save the changes, or “Cancel” to cancel the operation.



Modifying Scope Elements

A Scope Element may require an updated description. To update the description for a “Scope Element”, follow these steps:

1. Modify the text in the “Proposed” field for the corresponding Scope Element.
2. Click “Save” to save the changes, or “Cancel” to cancel the operation.



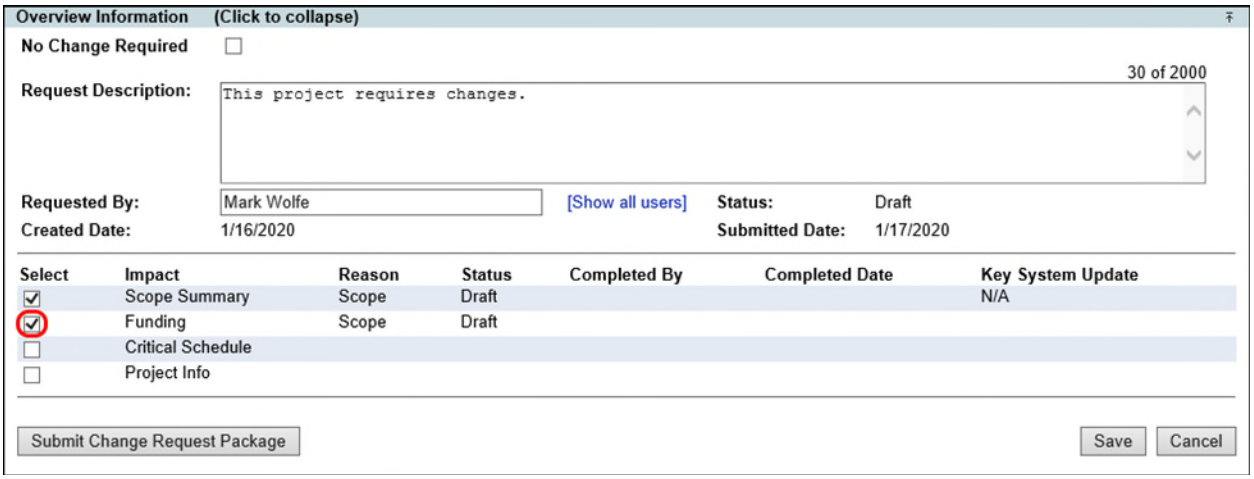
Funding Impact Area

A Change Request Package may include funding changes. The Funding tab within the Impact Area Information panel defines these changes. The “Funding” Impact Area allows a user to add, remove, or modify funding changes associated with the project.

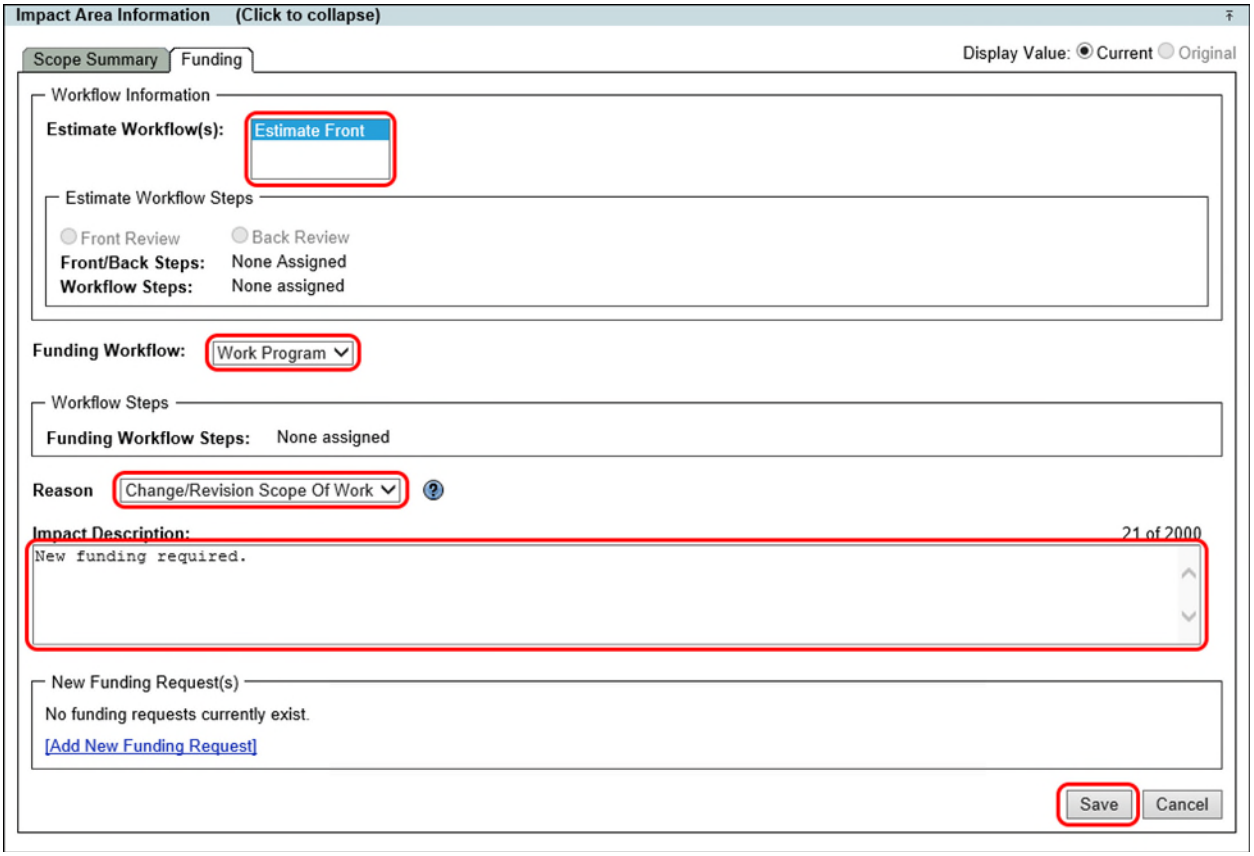
Adding the Funding Impact Area

To add the Funding Impact Area to the Change Request Package, follow these steps:

1. Within the Overview Information Panel click the checkbox next to “Funding” in the list of Impact Areas. The Funding tab will appear in the Impact Area Information panel.



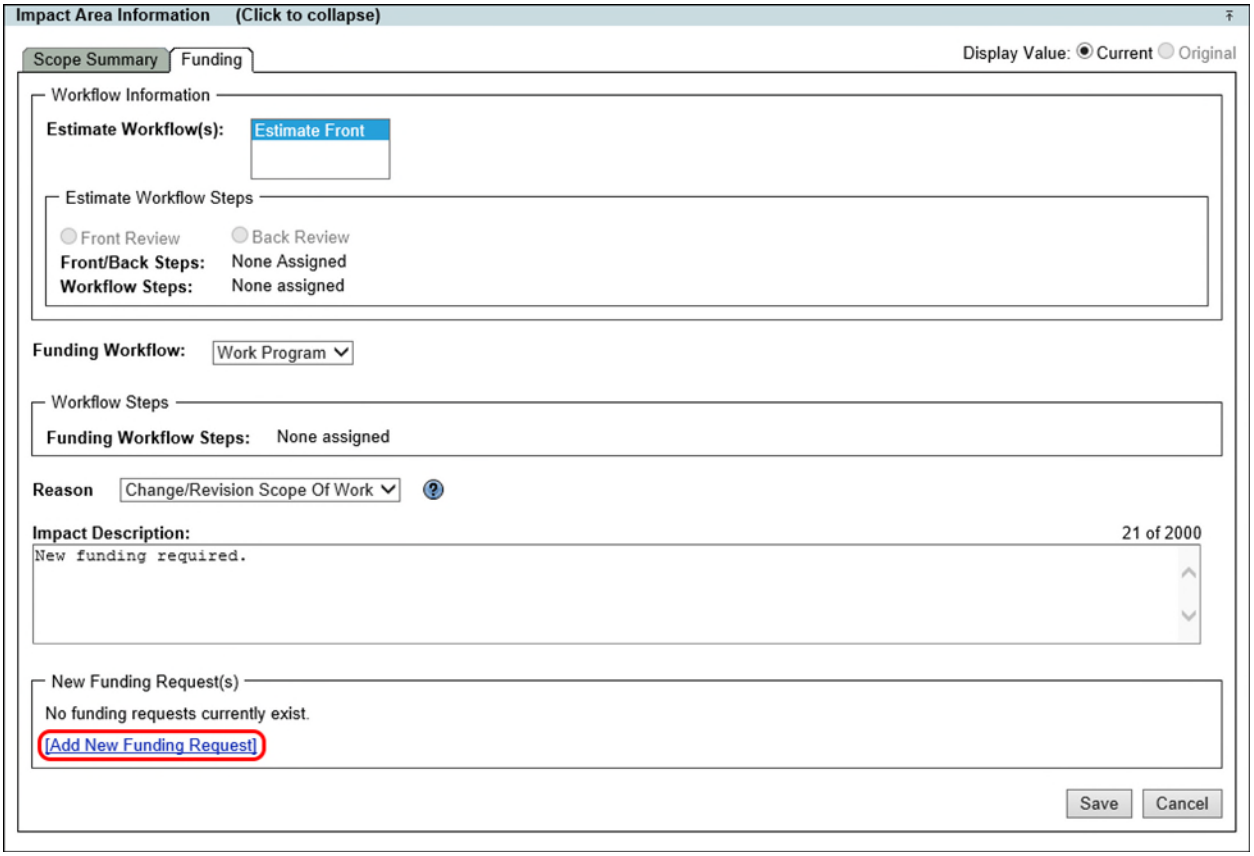
2. Select one or more workflows from the “Estimate Workflows” list. CTRL + click to include more than one workflow.
3. Select a workflow from the “Funding Workflow” dropdown list.
4. Select a reason for the change from the “Reason” dropdown list. This field is required.
5. Enter an “Impact Description”. This field is required.
6. Add, remove, or modify “New Funding Requests”. (refer to the following sections)
7. Click “Save” to add the Funding Impact Area, or “Cancel” to cancel the operation.



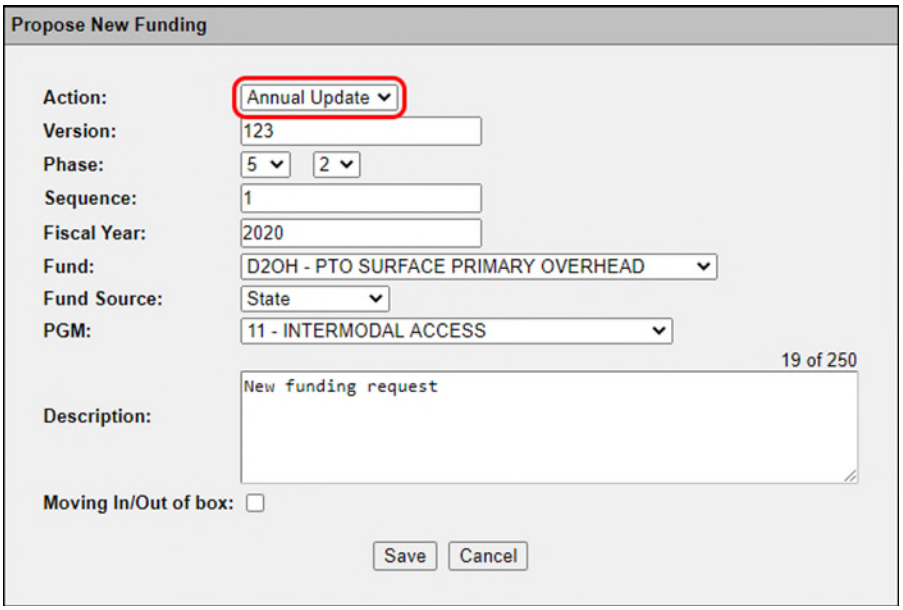
Adding a New Funding Request

New funding requests may be required for the project. To add a "New Funding Request", follow these steps:

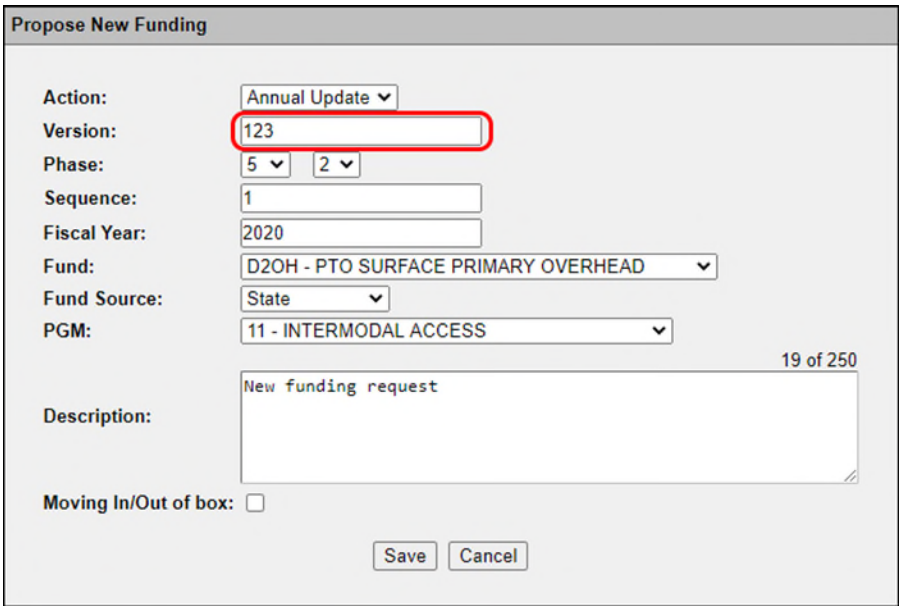
1. Click the "Add New Funding Request" link. This will open the "Propose New Funding" dialog.



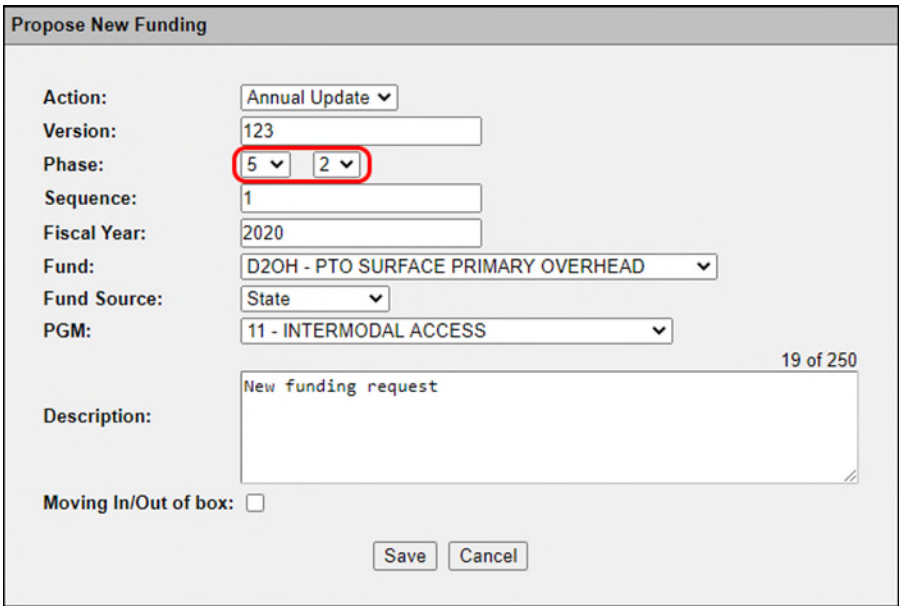
2. Select an action from the "Action" dropdown list. "Add" is selected by default. This field is required.



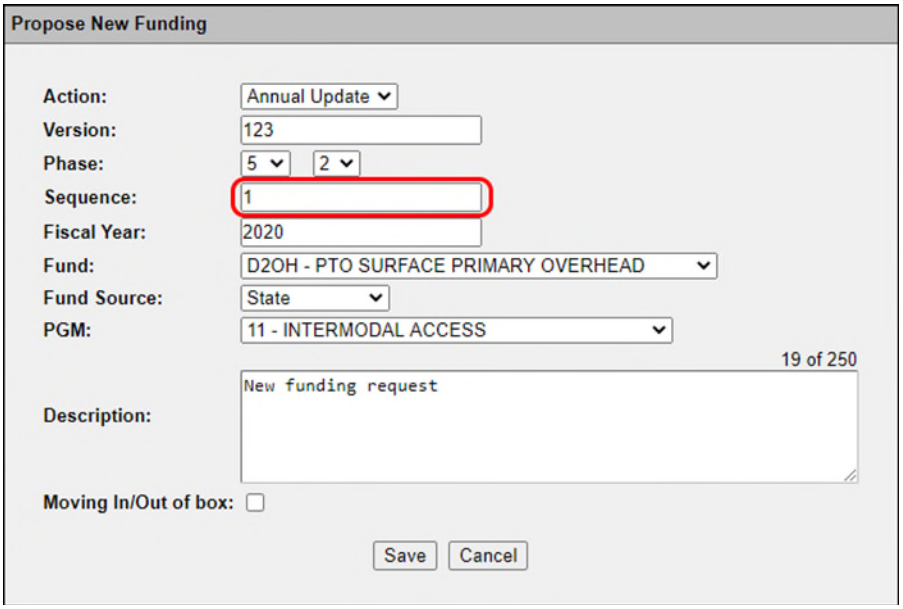
3. Enter a three-digit version number in the “Version” field. Note that this field is only available if the selected action is “Annual Update”. This field is optional.



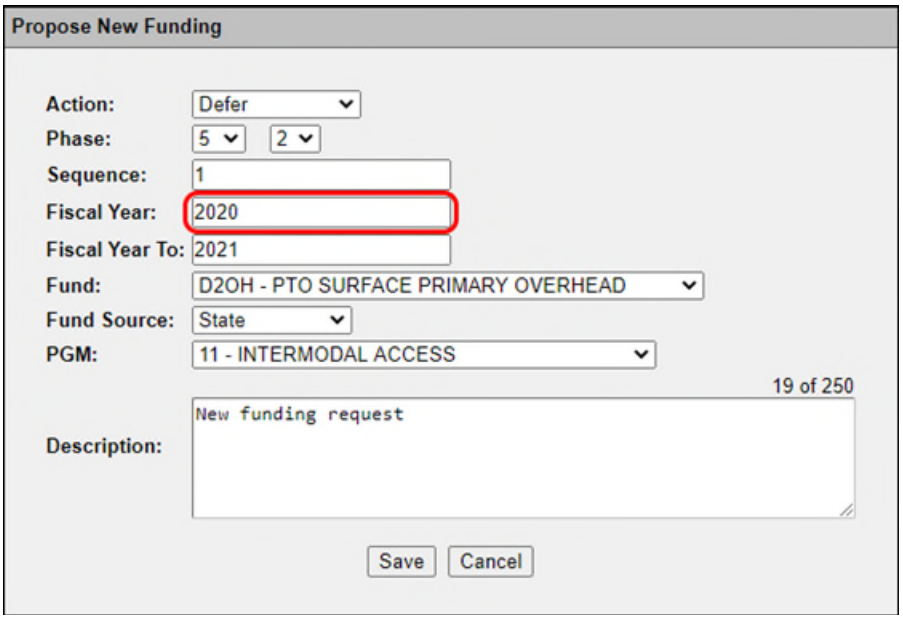
4. Select a “Phase Group” and “Phase Type” from the “Phase” dropdown lists. These fields are required.



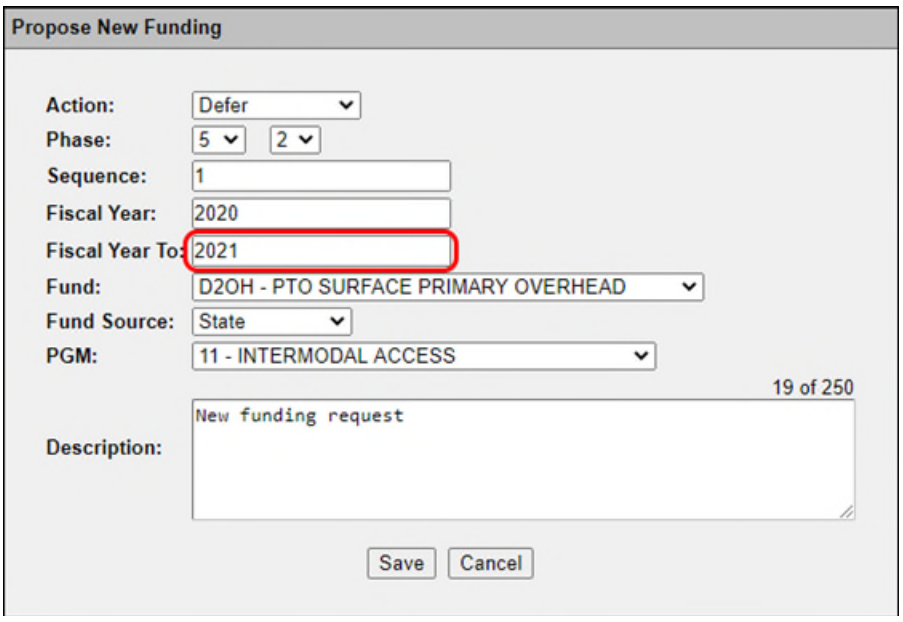
5. Enter a two-digit sequence number in the “Sequence” field. This field is required.



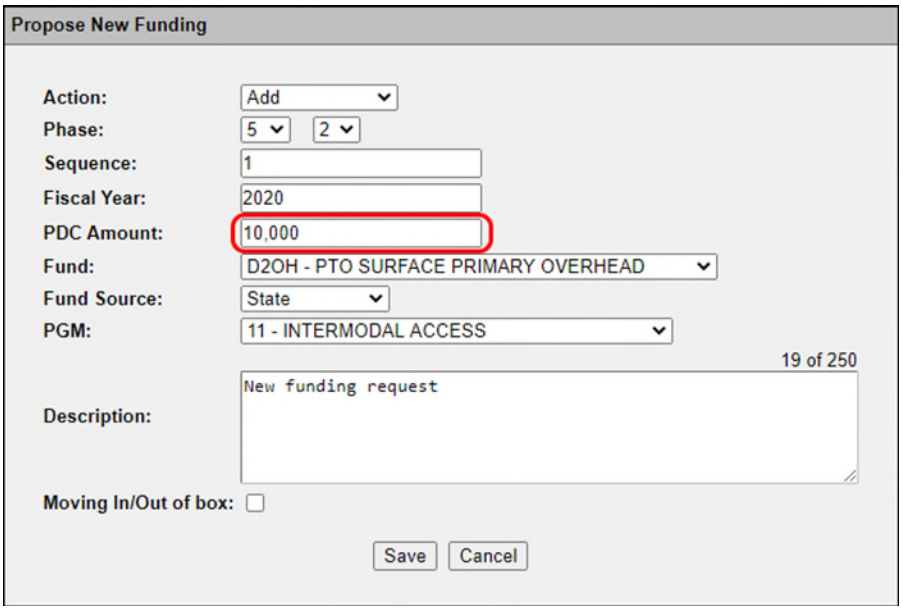
6. Enter a year in the “Fiscal Year” field. This field is optional.



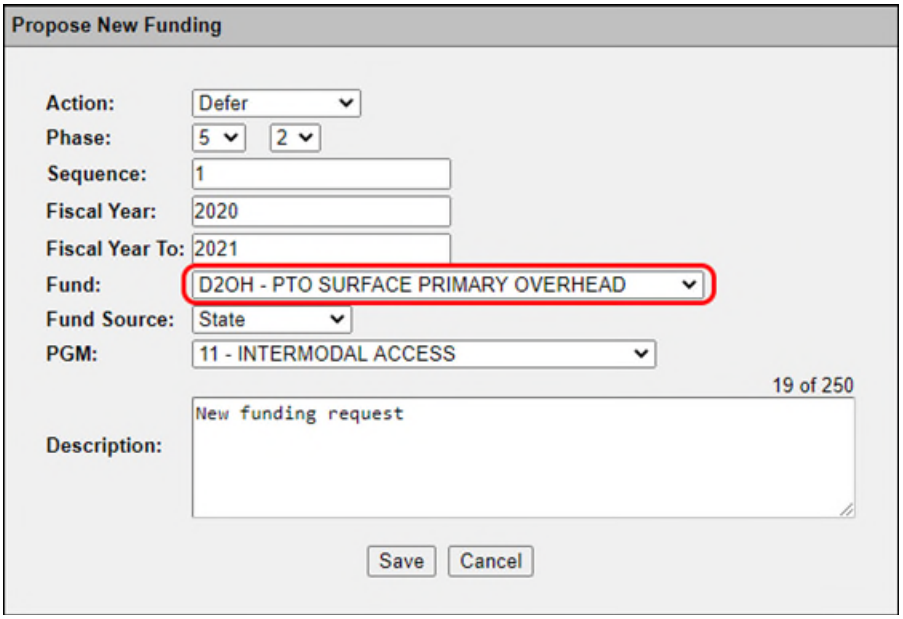
7. Enter a year in the “Fiscal Year To” field. Note that this field is only available if the selected action is “Advance” or “Defer”. This field is optional.



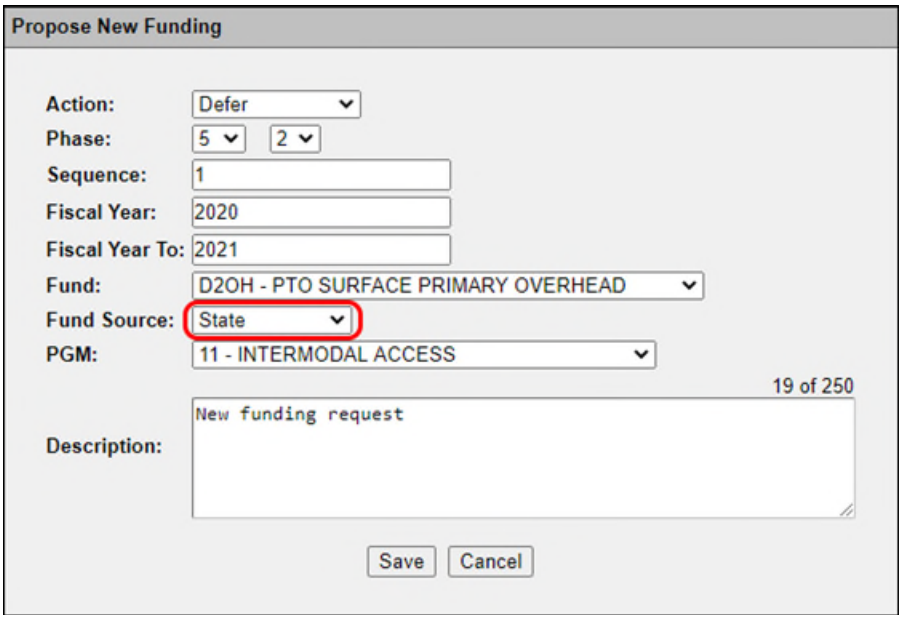
8. Enter a dollar amount in the “PDC Amount” field. Note that this is only available if the selected action is “Add”, “Decrease”, or “Increase”. If available, this field is required.



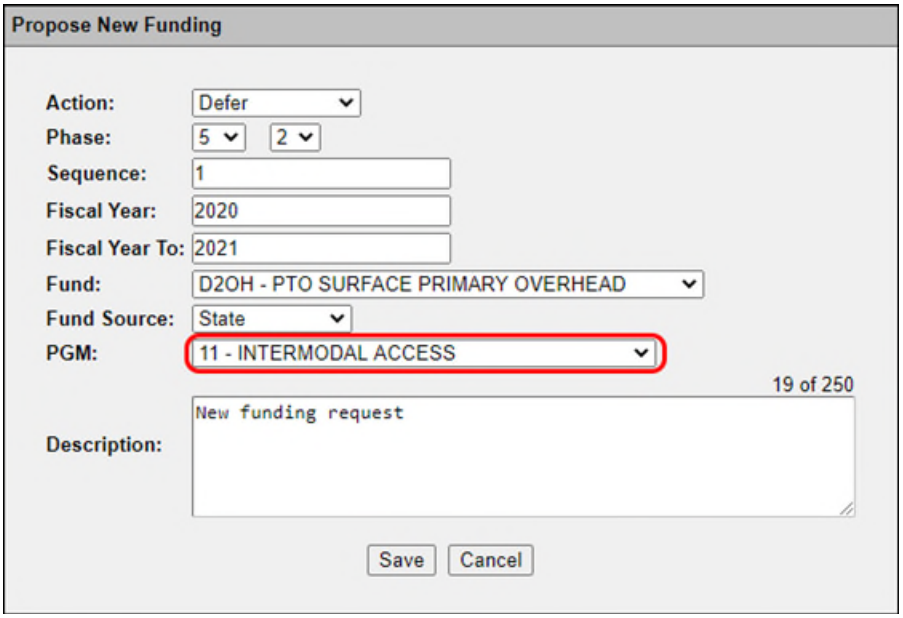
9. Select a fund type from the “Fund” dropdown list. This field is optional.



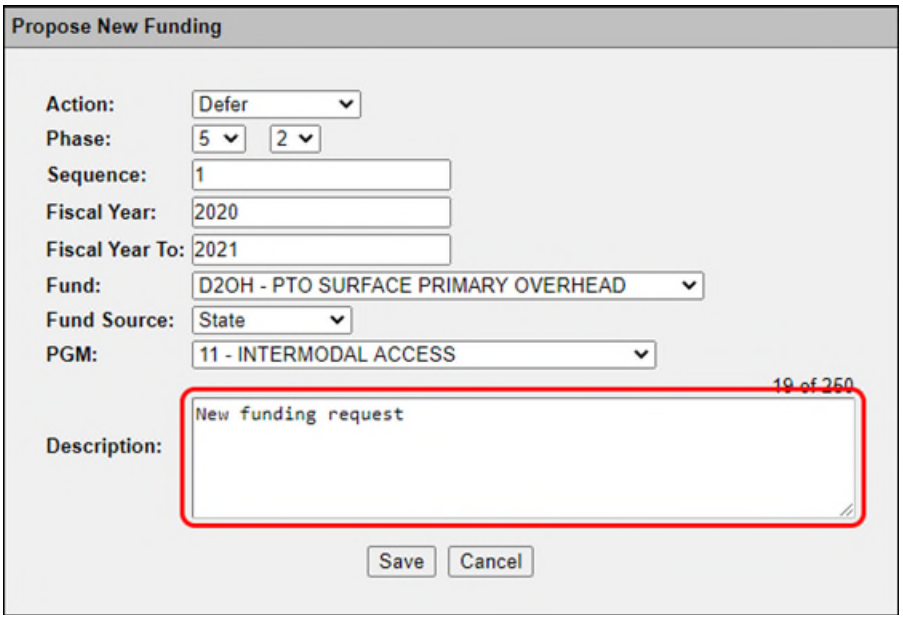
10. Select a source from the “Fund Source” dropdown list. This field is optional.



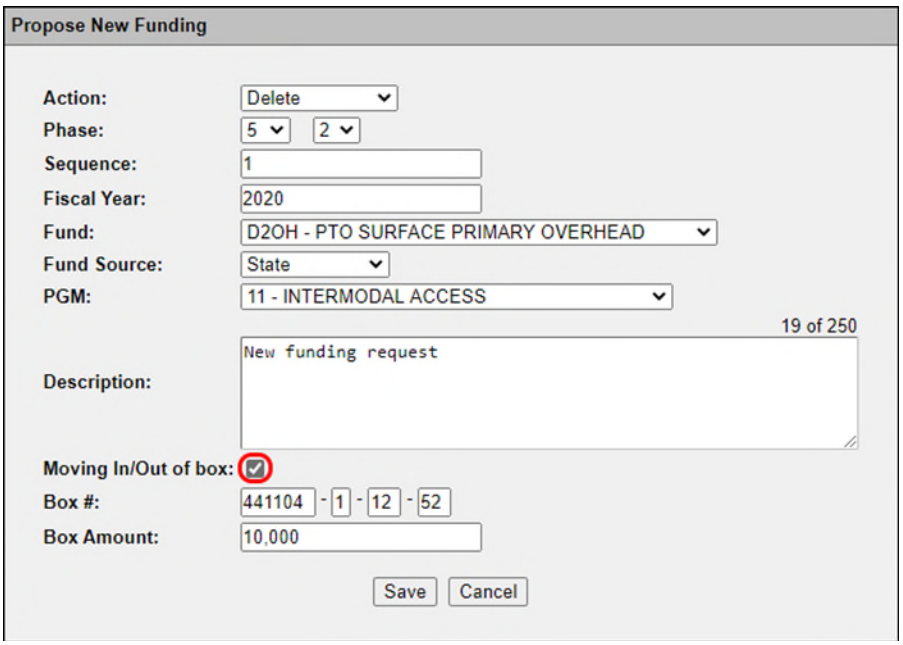
11. Select a program type from the “PGM” dropdown list. This field is optional.



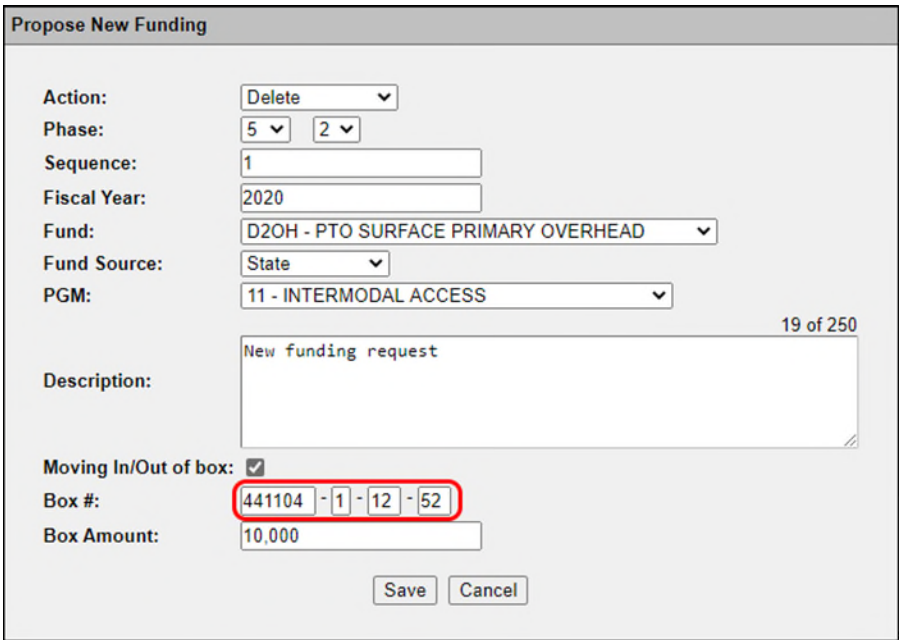
12. Enter a description in the “Description” field. This field is optional.



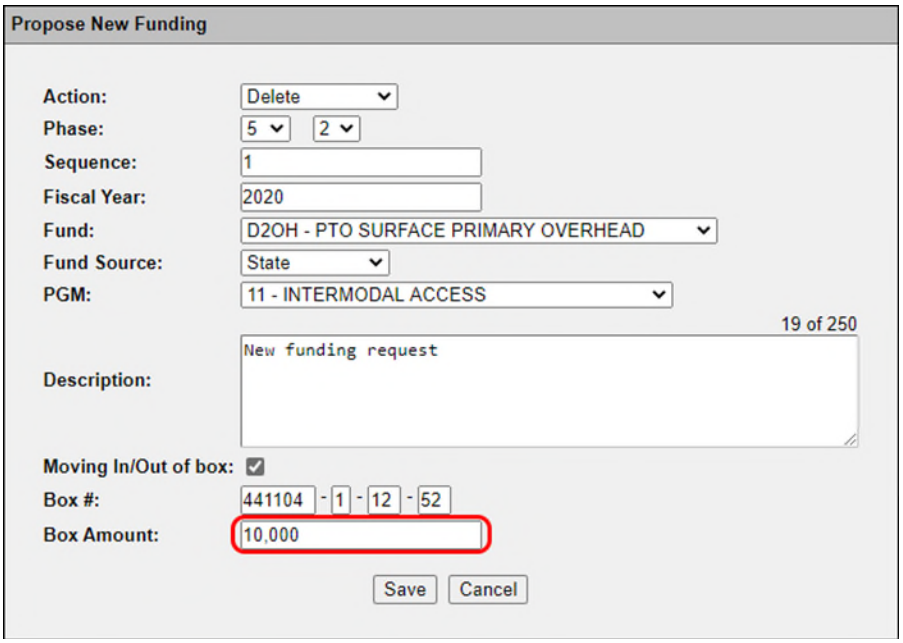
13. Select the “Moving In/Out of box” if funds are to be moved from or to another source. This field is only available if the action is “Add”, “Annual Update”, “Delete”, or “Increase”.



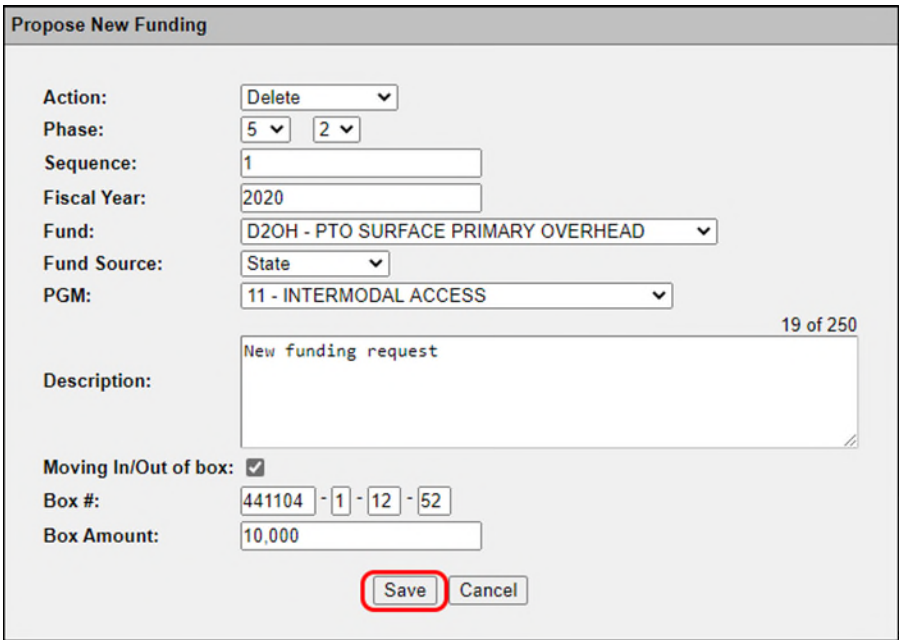
14. Enter a “Box Item”, “Box Item Segment”, “Box Sequence”, and “Box Phase” in the “Box #” fields. These fields are only available if the “Moving In/Out of box” is checked. If available, these fields are required.



15. Enter an amount in the “Box Amount” field. This field is only available if the “Moving In/Out of box” is checked. If available, this field is required.



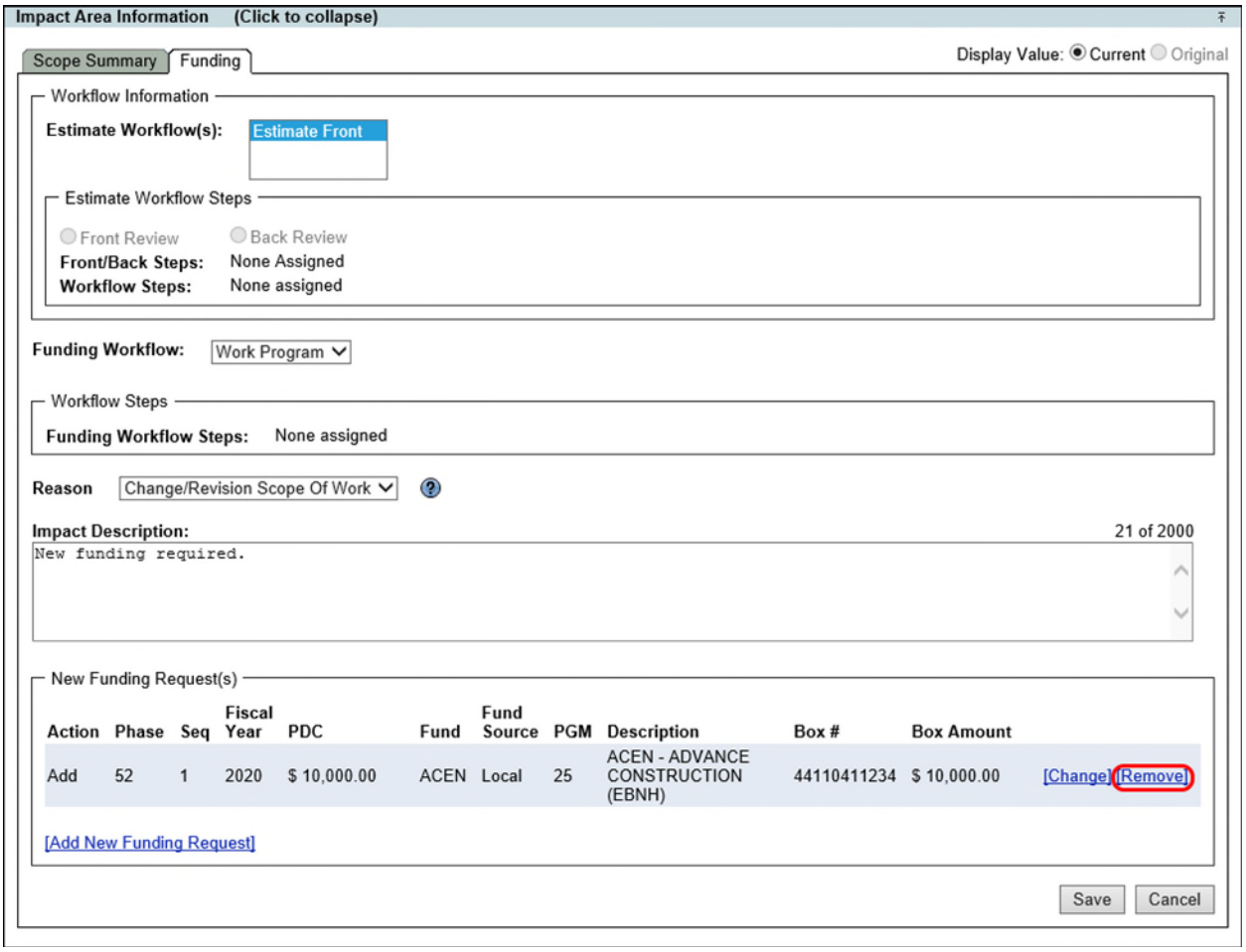
16. Click “Save” to save the changes, or “Cancel” to cancel the operation.



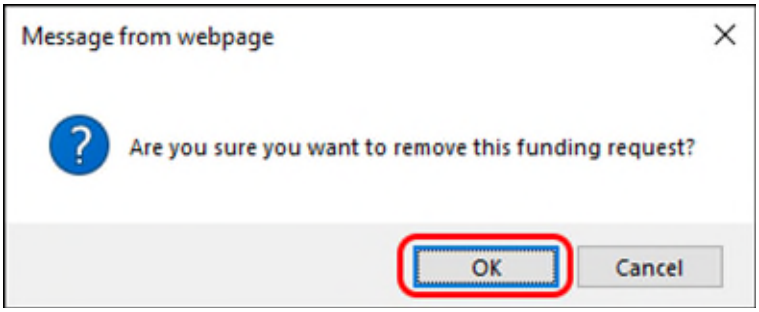
Removing a New Funding Request

A user may wish to remove a new funding request from the “Funding” impact area. To remove a “New Funding Request”, follow these steps:

1. Click “Remove” next to the desired funding request. This will open a confirmation dialog.



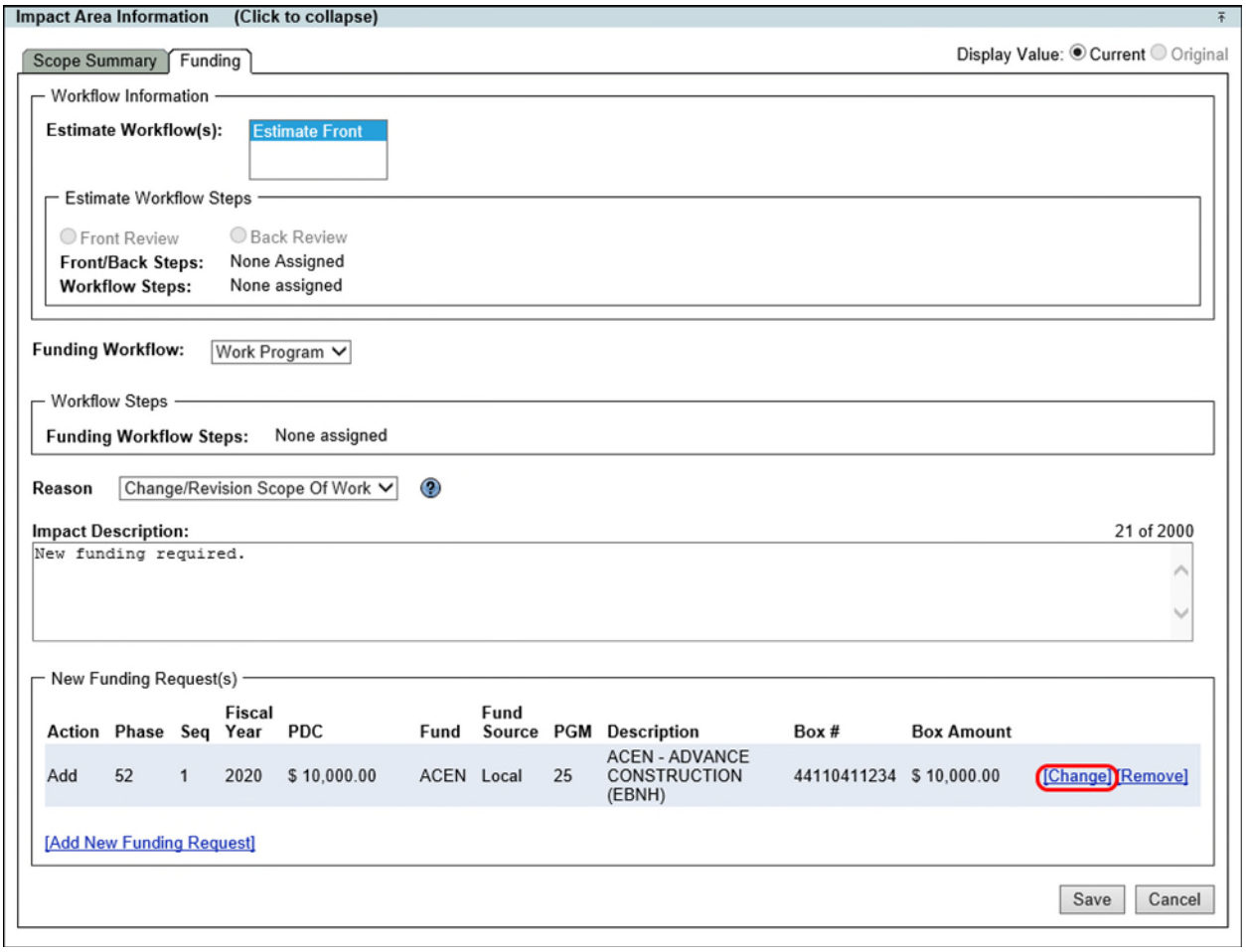
2. Click “OK” to remove the funding request, or “Cancel” to cancel the operation.



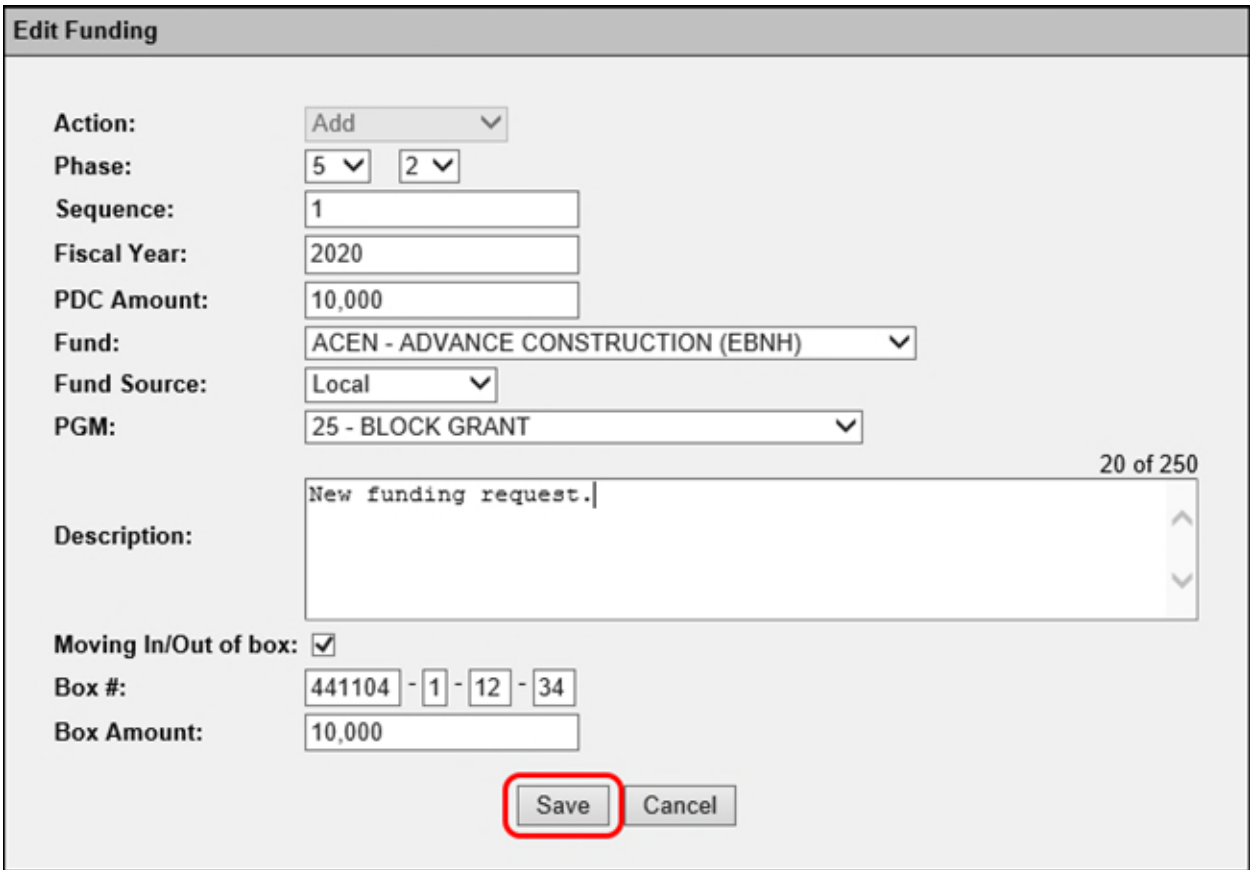
Modifying a New Funding Request

A New Funding Request may require changes. To modify a “New Funding Request”, follow these steps:

1. Click “Change” next to the desired funding request. This will open the “Edit Funding” dialog.



2. Make the necessary edits to the funding requests.
3. Click “Save” to save the changes, or “Cancel” to cancel the operation.



Note: The "Action" field is no longer editable once a funding request has been created. If a different funding request type is required, remove the current funding request and add a new funding request as described above.

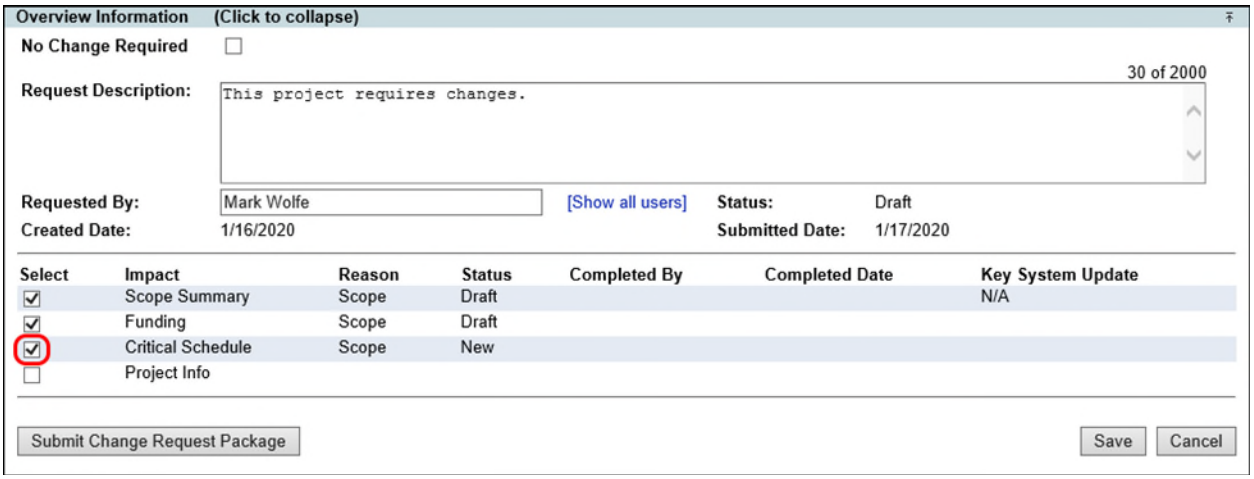
Critical Schedule Impact Area

A Change Request Package may include critical schedule changes. The Critical Schedule tab within the Impact Area Information panel defines these changes. The "Critical Schedule" Impact Area allows a user to add, remove, or modify critical schedule changes associated with the project.

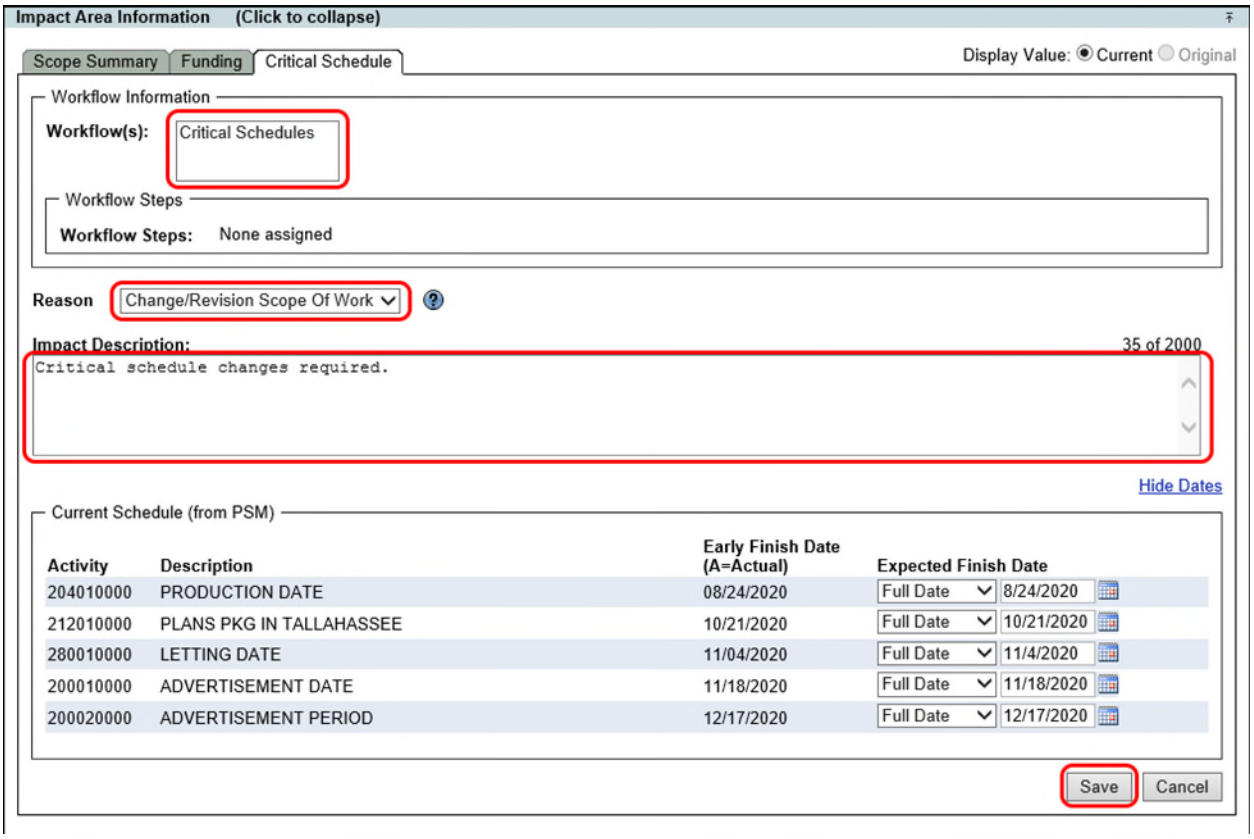
Adding the Critical Schedule Impact Area

To add the Critical Schedule Impact Area to the Change Request Package, follow these steps:

1. Within the Overview Information Panel click the checkbox next to "Critical Schedule" in the list of Impact Areas. The Critical Schedule tab will appear in the Impact Area Information panel.



2. Select one or more workflows from the "Workflows" list. CTRL + click to include more than one workflow.
3. Select a reason for the change from the "Reason" dropdown list. This field is required.
4. Enter an "Impact Description". This field is required.
5. Modify critical dates in the "Current Schedule (from PSM) section as necessary.
6. Click "Save" to add the Funding Impact Area, or "Cancel" to cancel the operation.

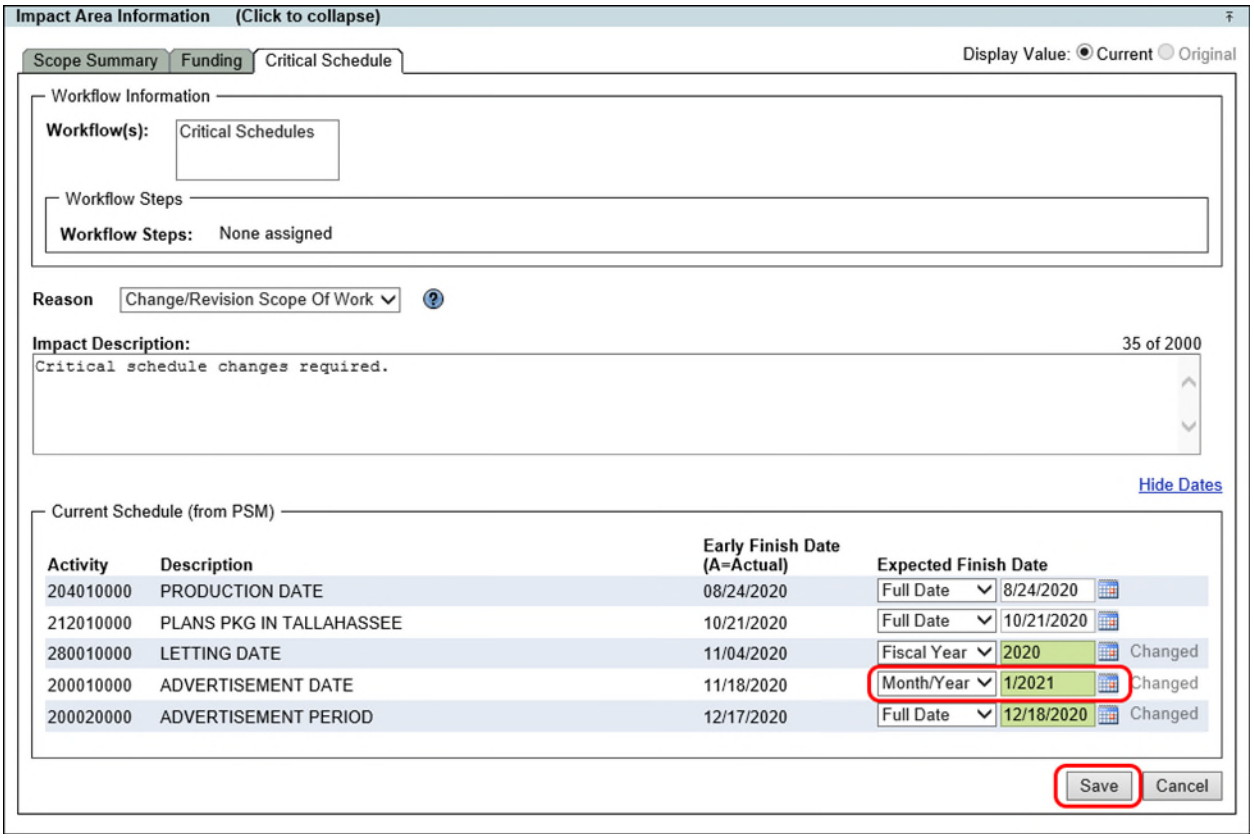


Modifying Critical Dates

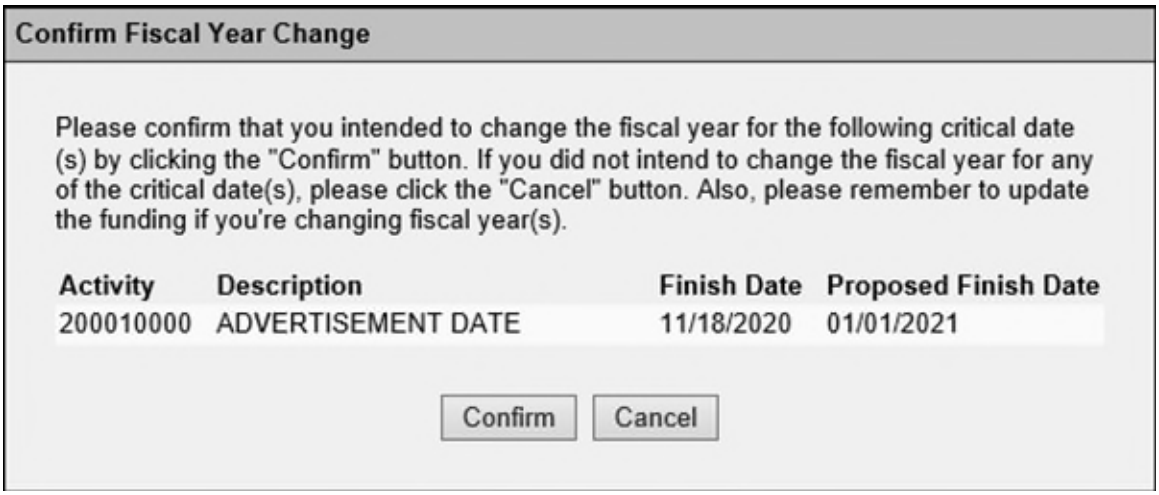
The current critical dates for the project are listed in the "Current Schedule (from PSM)" section. The expected finish date for each of these items in the project schedule may be updated. A date annotated

with “(A)” is an “Actual” finish date and may not be edited. To update a Critical Schedule date, perform the following:

1. Select “Fiscal Year”, “Full Date”, or “Month/Year” from the date type dropdown list.
2. Click on the date field or calendar icon to select the new date. Note that if the year of the selected date is different from the current year, a confirmation will be required upon saving.
3. Click “Save” to save the changes, or “Cancel” to cancel the operation. If the year for any of the updated critical dates is different than the current date, a confirmation dialog will appear.



4. If necessary, confirm any fiscal year changes. Click “Confirm” to save, or “Cancel” to cancel the operation.



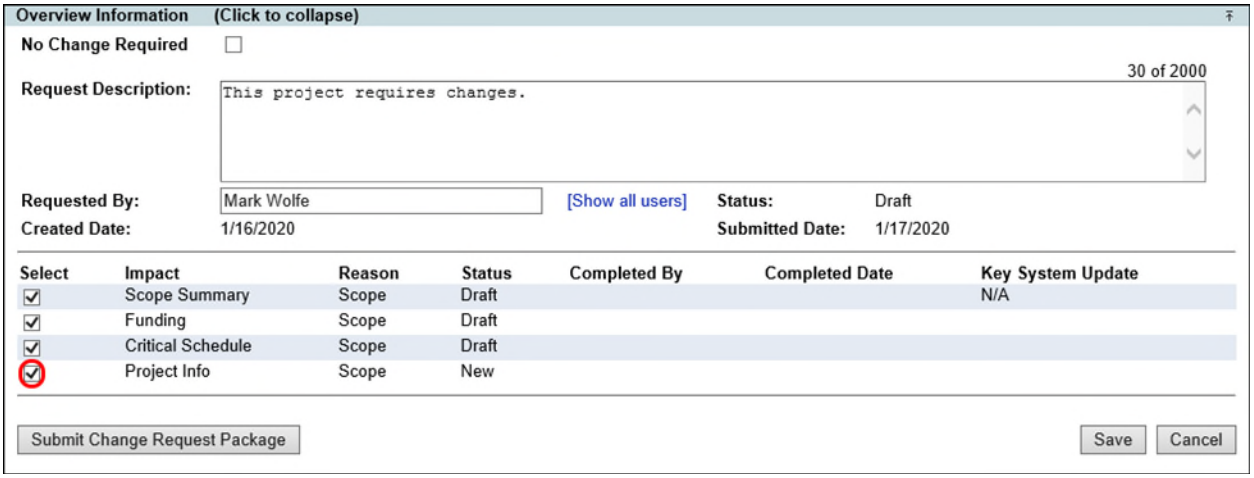
Project Info Impact Area

A Change Request Package may include project info changes. The Project Info tab within the Impact Area Information panel defines these changes. The “Project Info” Impact Area allows a user update Item Segment information, including descriptions, comments, locations, groups, and project managers.

Adding the Project Info Impact Area

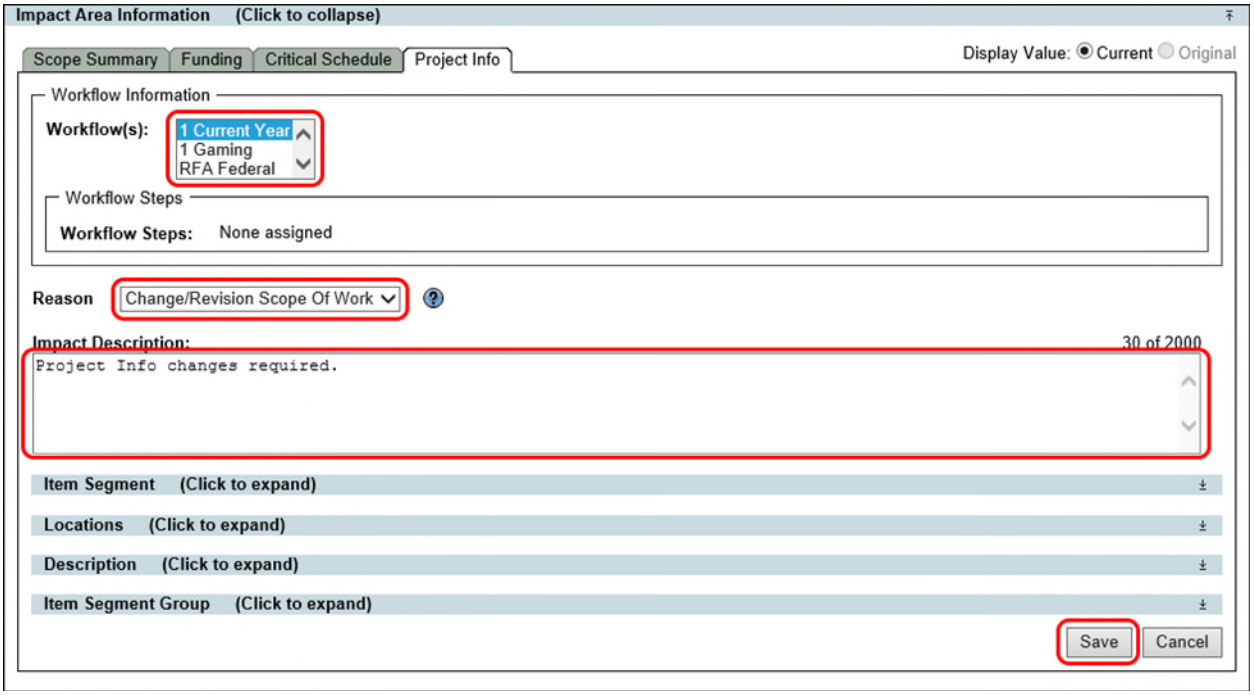
To add the Project Info Impact Area to the Change Request Package, follow these steps:

1. Within the Overview Information Panel click the checkbox next to “Project Info” in the list of Impact Areas. The Project Info tab will appear in the Impact Area Information panel.



2. Select one or more workflows from the “Workflows” list. CTRL + click to include more than one workflow.
3. Select a reason for the change from the “Reason” dropdown list. This field is required.
4. Enter an “Impact Description”. This field is required.
5. Modify item segment information in the “Item Segment” panel. (refer to the following sections)
6. Add, remove, or edit locations in the “Locations” panel. (refer to the following sections)
7. Modify description information in the “Description” panel. (refer to the following sections)

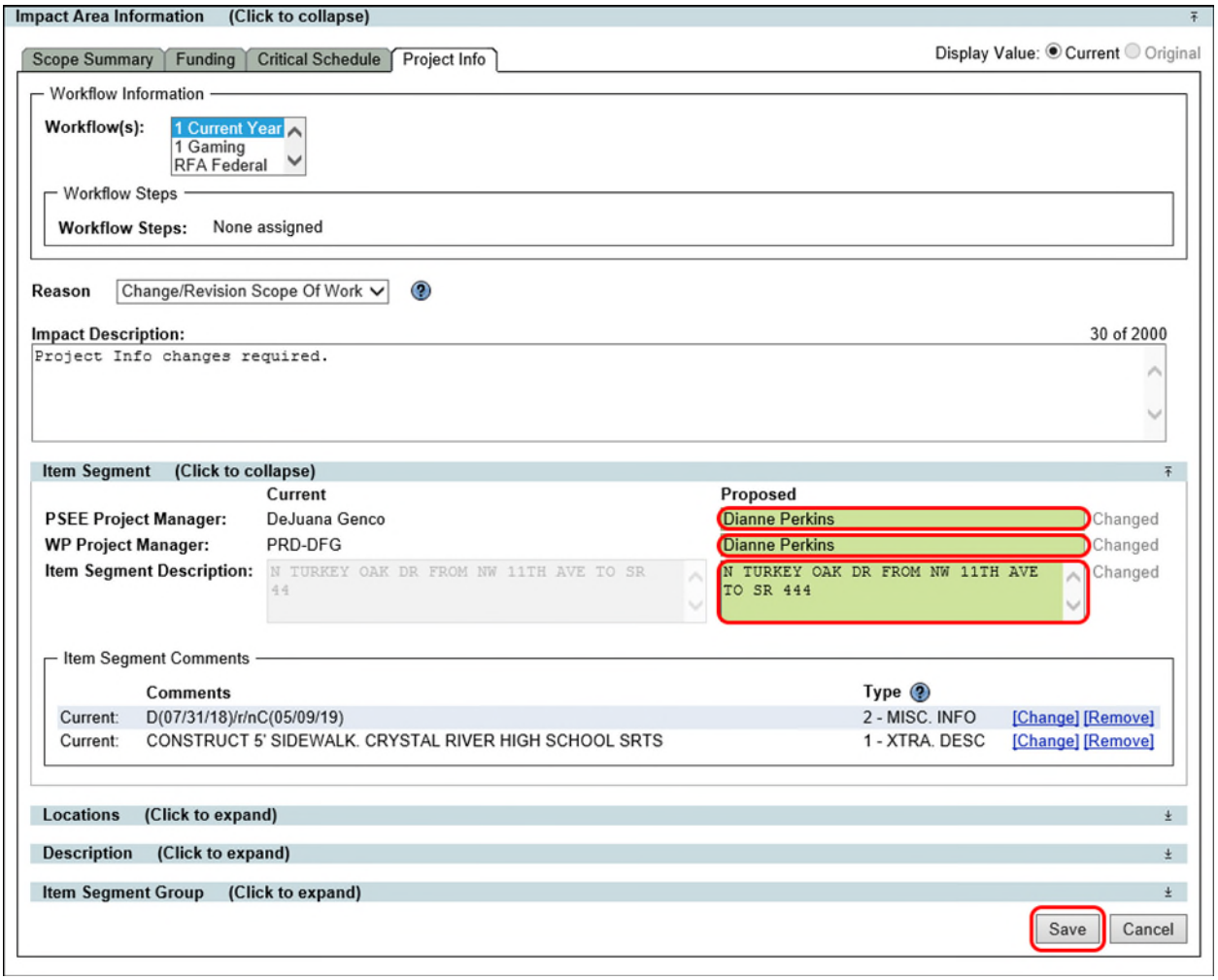
8. Add, remove, or edit item segment groups in the “Item Segment Group” panel. (refer to the following sections)
9. Click “Save” to add the Project Info Impact Area, or “Cancel” to cancel the operation.



Modifying Item Segment Information

The Project Info Impact Area includes an Item Segment panel, which allows the user to edit project managers, the item segment description and item segment comments. To edit the project managers or item segment description, do the following:

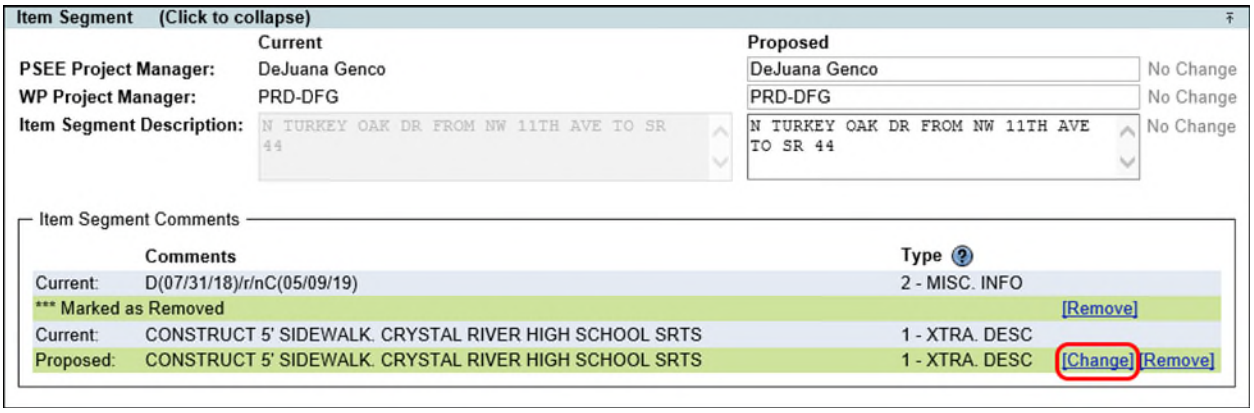
1. Click in the proposed “PSEE Project Manager” field and begin typing. Select a user from the dropdown list that appears.
2. Click in the proposed “WP Project Manager” field and begin typing. Select a user from the dropdown list that appears.
3. Modify the text in the proposed “Item Segment Description” field.
4. Click “Save” to save the changes, or “Cancel” to cancel the operation.



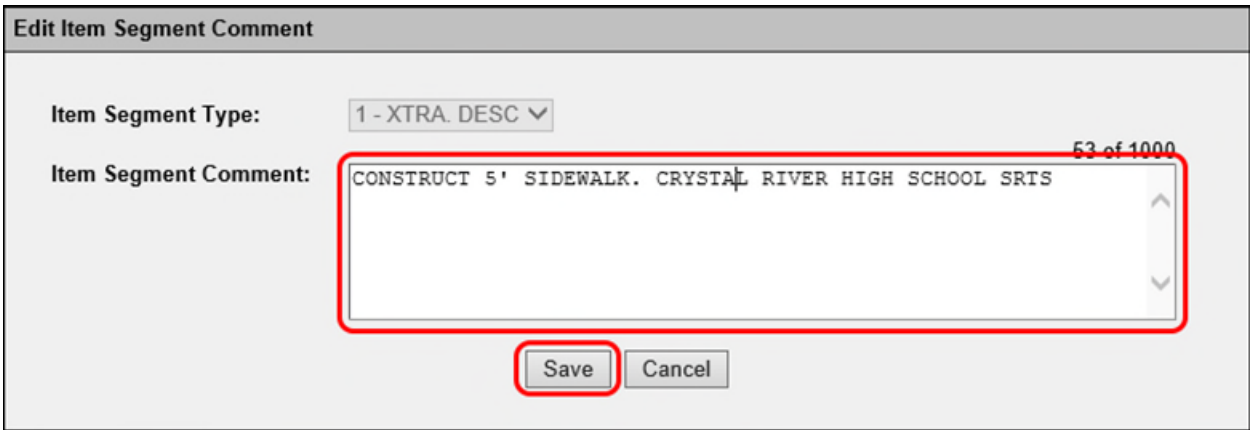
Editing Item Segment Comments

Item Segment Comments are located in the Item Segment panel of the Project Info tab. This list displays current/original, proposed, and removed comments. Comments may be one of two types: “1 – XTRA. DESC” or “2 – MISC. INFO”. Item Segment Comments may be changed or removed. To change an “Item Segment Comment”, perform the following steps:

1. Click “Change” next to the desired comment. This will open the “Edit Item Segment Comment” dialog.



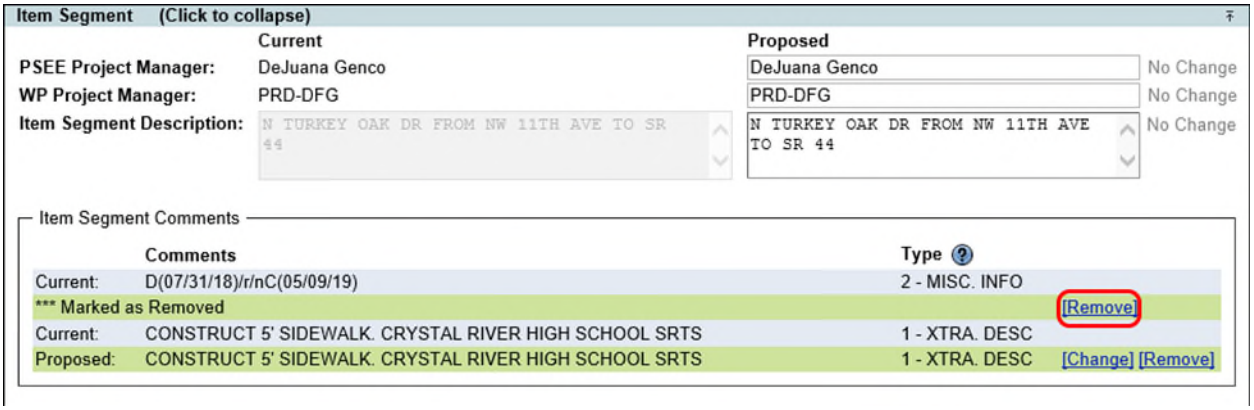
2. Edit the “Item Segment Comment”.
3. Click “Save” to save the changes, or “Cancel” to cancel the operation.



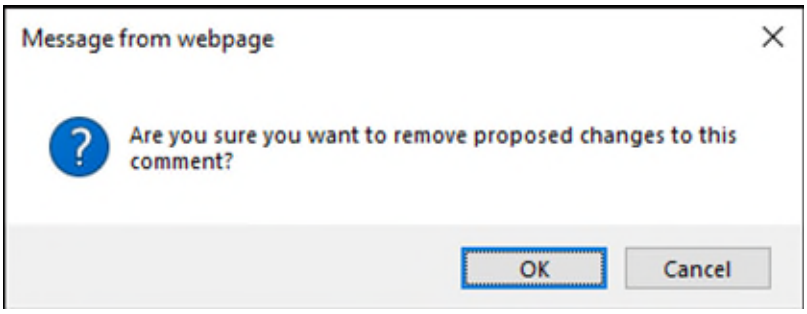
Removing Item Segment Comments

A current or proposed item segment comment may need to be removed from a project. To remove an item segment comment, do the following:

1. Click “Remove” next to the desired item segment comment. This will open a confirmation dialog.



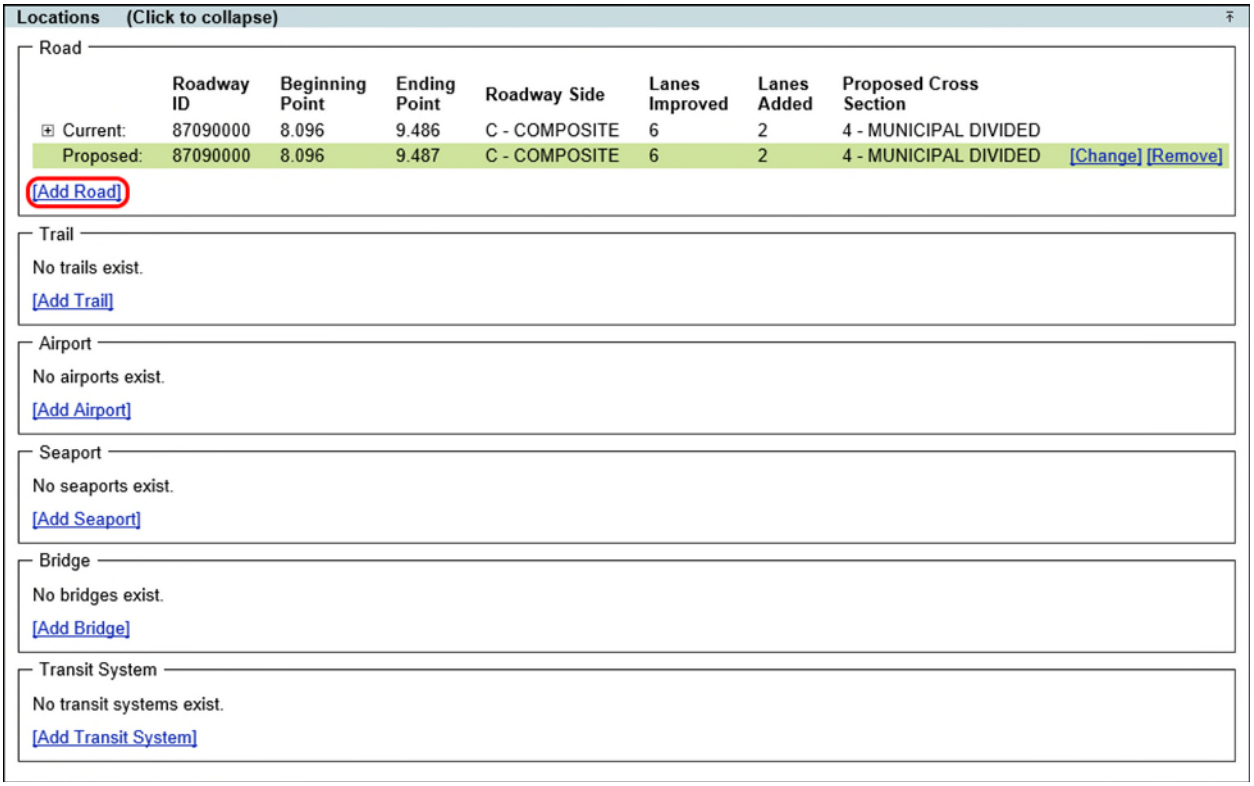
2. Confirm that this item segment comment is to be removed. Click “OK” to remove, or “Cancel” to cancel the action.



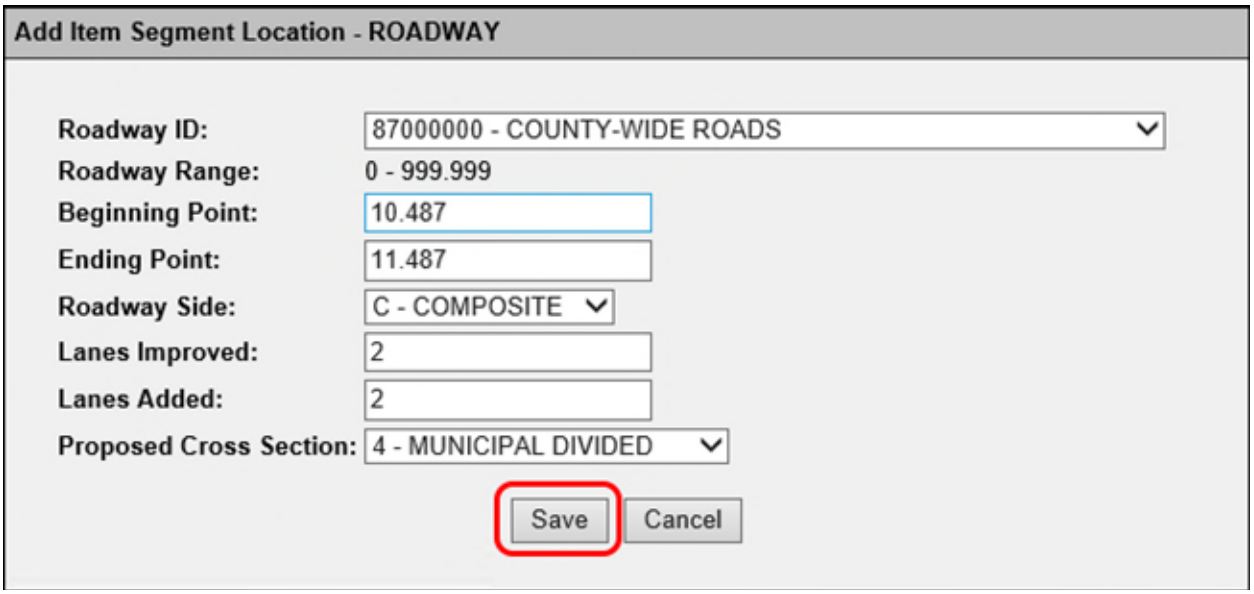
Adding a Road

Roads associated with the project are displayed in the "Road" section of the "Locations" panel in the "Project Info" tab. This list shows current/original, proposed, new, and removed roads. Each road may have associated Location Comments and Location Work Mixes. To add a road, follow these steps:

1. Click the "Add Road" link. This will open the "Add Item Segment Location – ROADWAY" dialog.



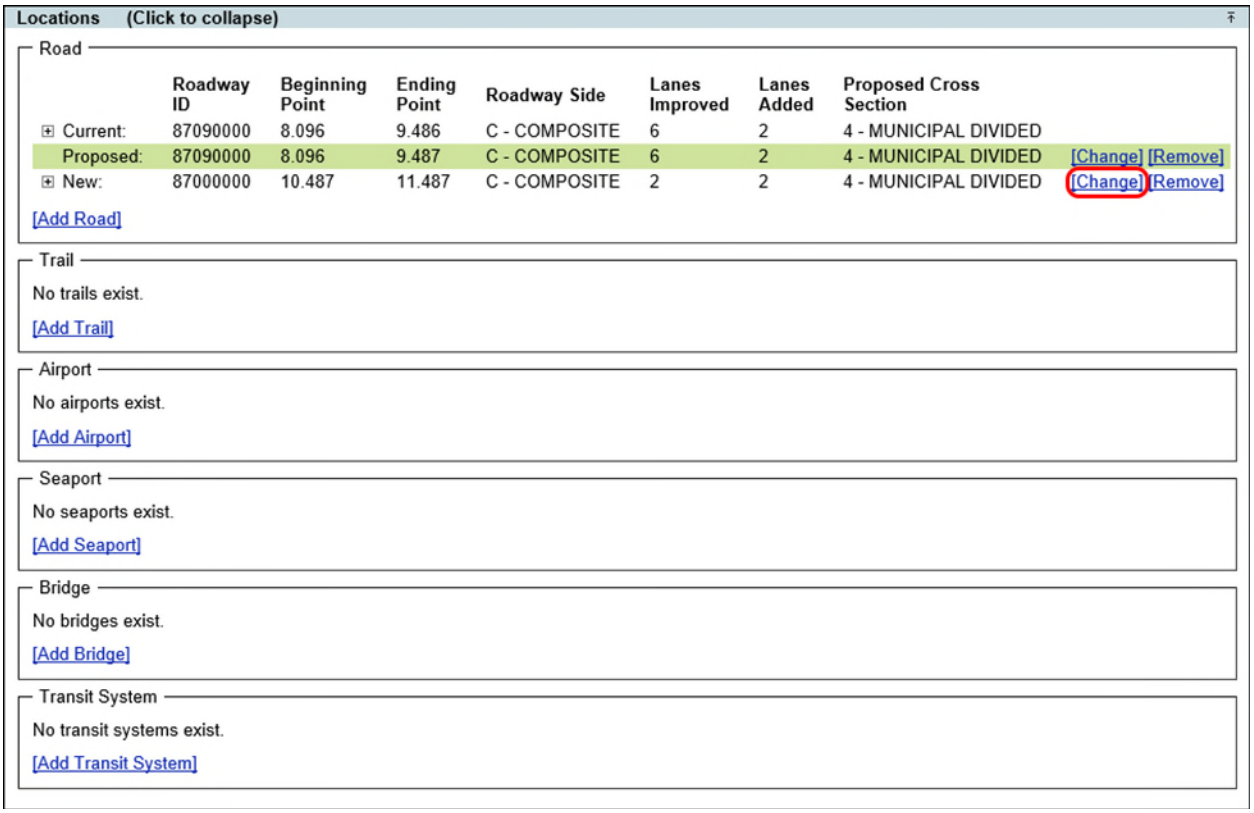
2. Select a roadway from the "Roadway ID" dropdown list. This field is required.
3. Enter a beginning point in the "Beginning Point" field. This field is required.
4. Enter an ending point in the "Ending Point" field. This field is required.
5. Select a roadway side type from the "Roadway Side" dropdown list.
6. Enter the number of lanes to be improved in the "Lanes Improved" field.
7. Enter the number of lanes to be added in the "Lanes Added" field.
8. Select a cross section type from the "Proposed Cross Section" dropdown list.
9. Click "Save" to add the road, or "Cancel" to cancel the action.



Editing a Road

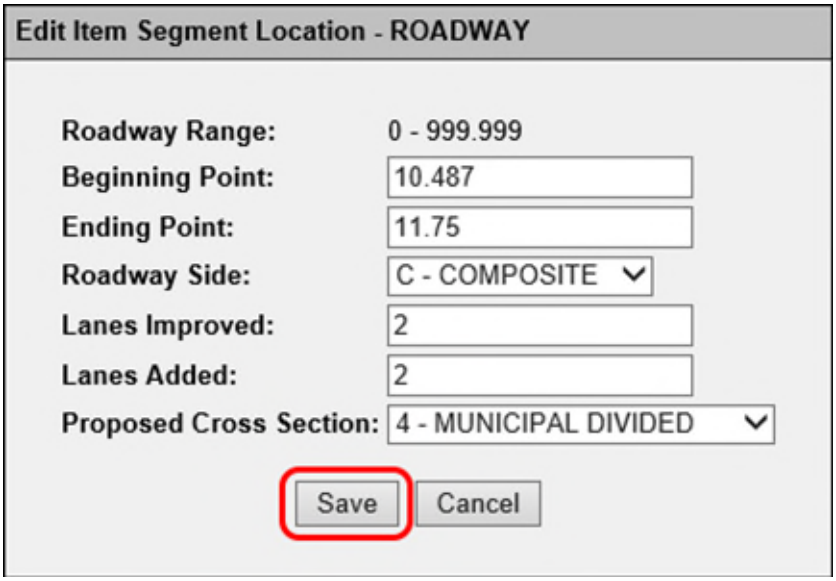
The details of a roadway location may be modified. To modify the details of a road, take the following steps:

1. Click the "Change" link next to the desired road. This will open the "Edit Item Segment Location – ROADWAY" dialog.



2. Make the necessary modifications to the roadway details.

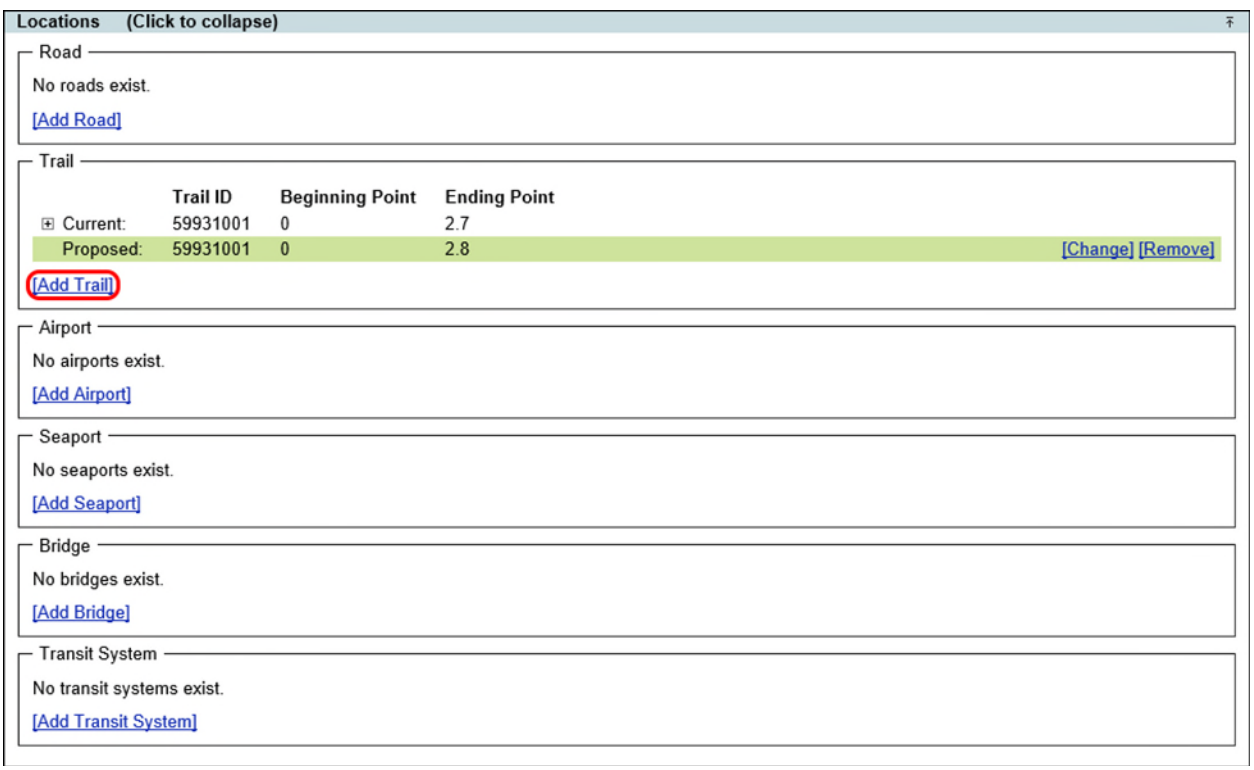
3. Click “Save” to save the changes, or “Cancel” to cancel the action.



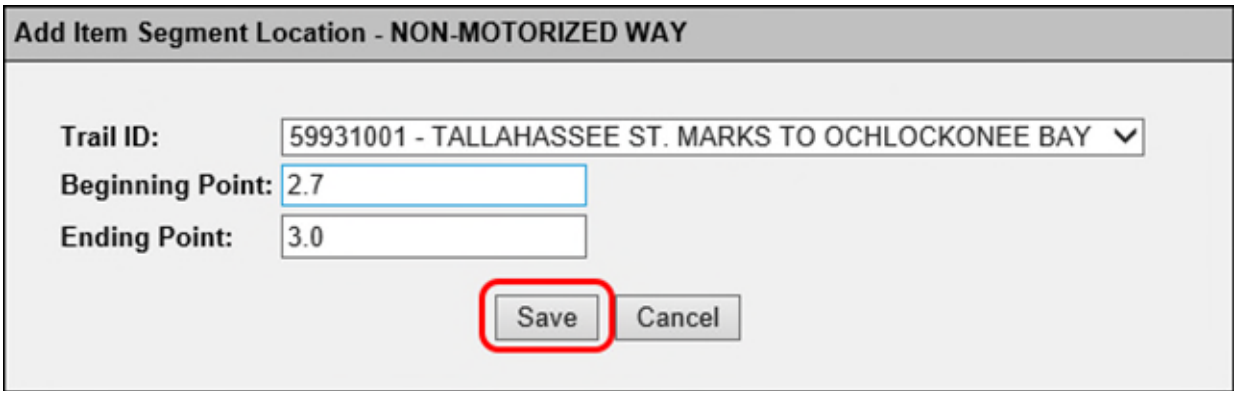
Adding a Trail

Trails associated with the project are displayed in the “Trail” section of the “Locations” panel in the “Project Info” tab. This list shows current/original, proposed, new, and removed trails. Each trail may have associated Location Comments and Location Work Mixes. To add a trail, follow these steps:

1. Click the “Add Trail” link. This will open the “Add Item Segment Location – NON-MOTORIZED WAY” dialog.



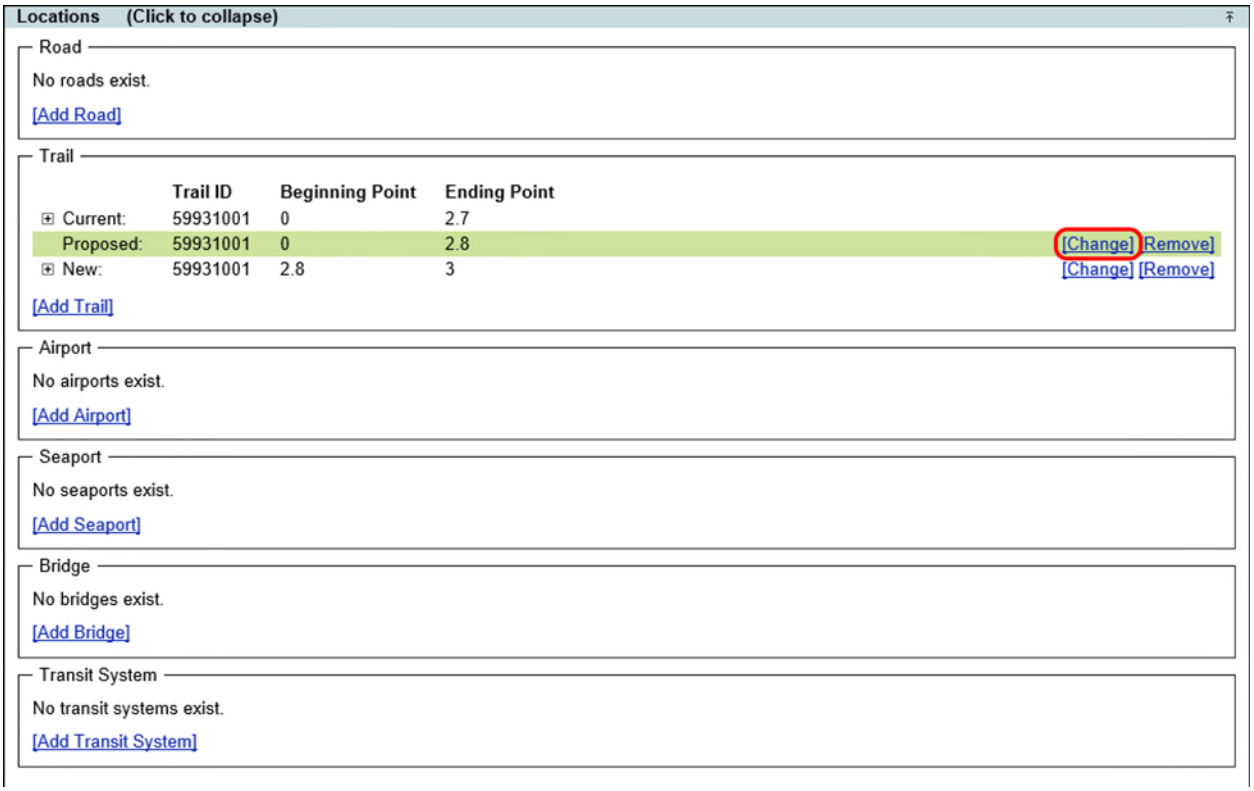
2. Select a trail from the “Trail ID” dropdown list. This field is required.
3. Enter a beginning point in the “Beginning Point” field. This field is required.
4. Enter an ending point in the “Ending Point” field. This field is required.
5. Click “Save” to add the trail, or “Cancel” to cancel the action.



Editing a Trail

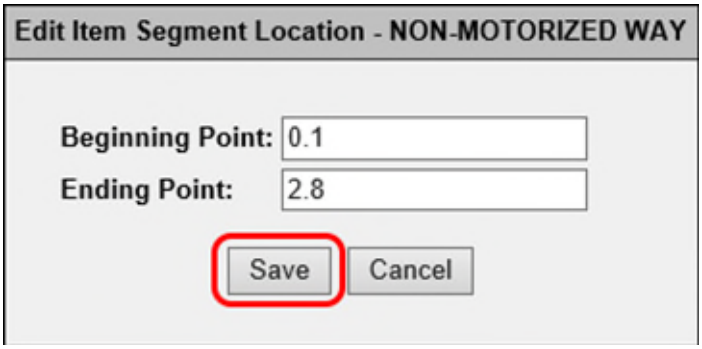
The details of a trail location may be modified. To modify the details of a trail, take the following steps:

1. Click the “Change” link next to the desired trail. This will open the “Edit Item Segment Location – NON-MOTORIZED WAY” dialog.



2. Make the necessary modifications to the trail details.

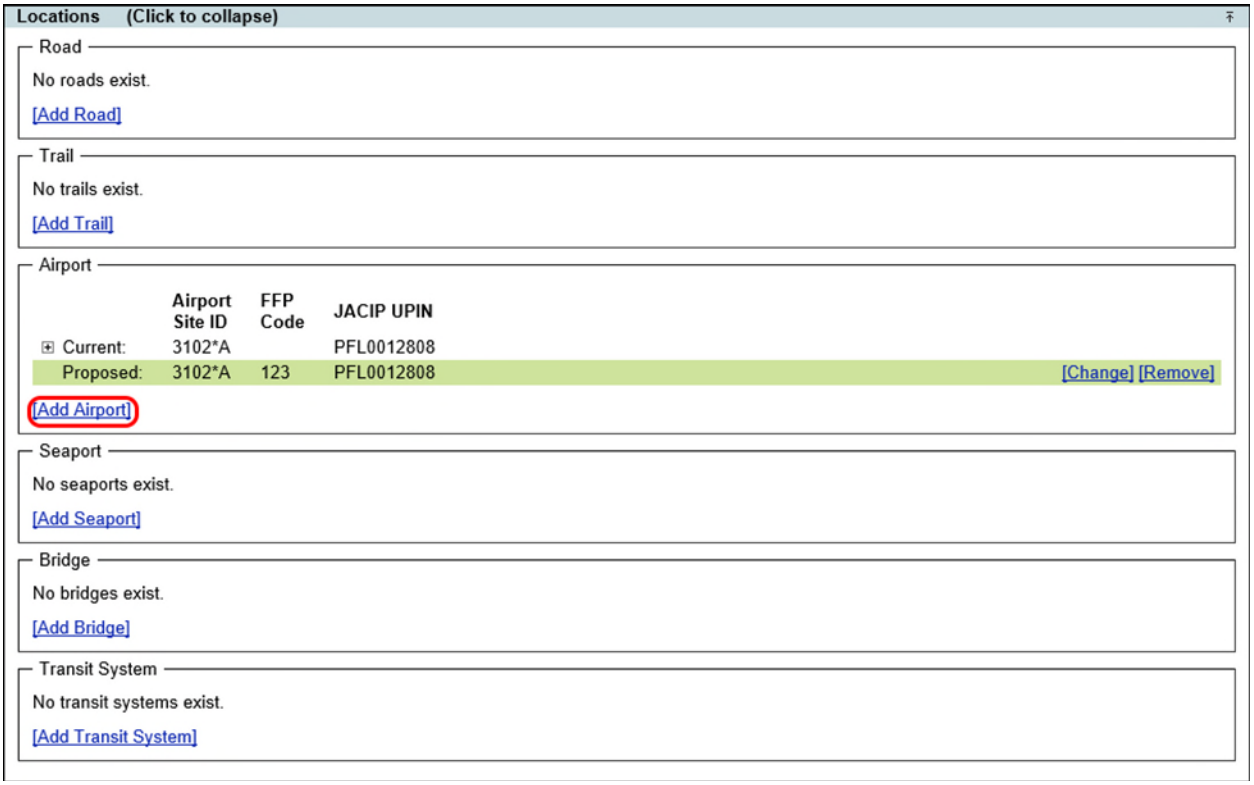
3. Click “Save” to save the changes, or “Cancel” to cancel the action.



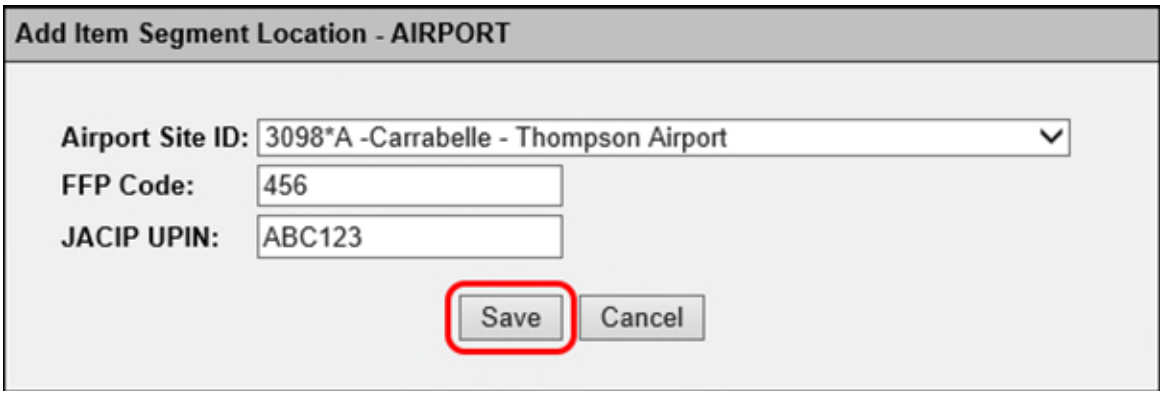
Adding an Airport

An airport associated with the project is displayed in the “Airport” section of the “Locations” panel in the “Project Info” tab. This list shows current/original, proposed, new, and removed airports. Each airport may have associated Location Comments and Location Work Mixes. To add an airport, follow these steps:

1. Click the “Add Airport” link. This will open the “Add Item Segment Location – AIRPORT” dialog.



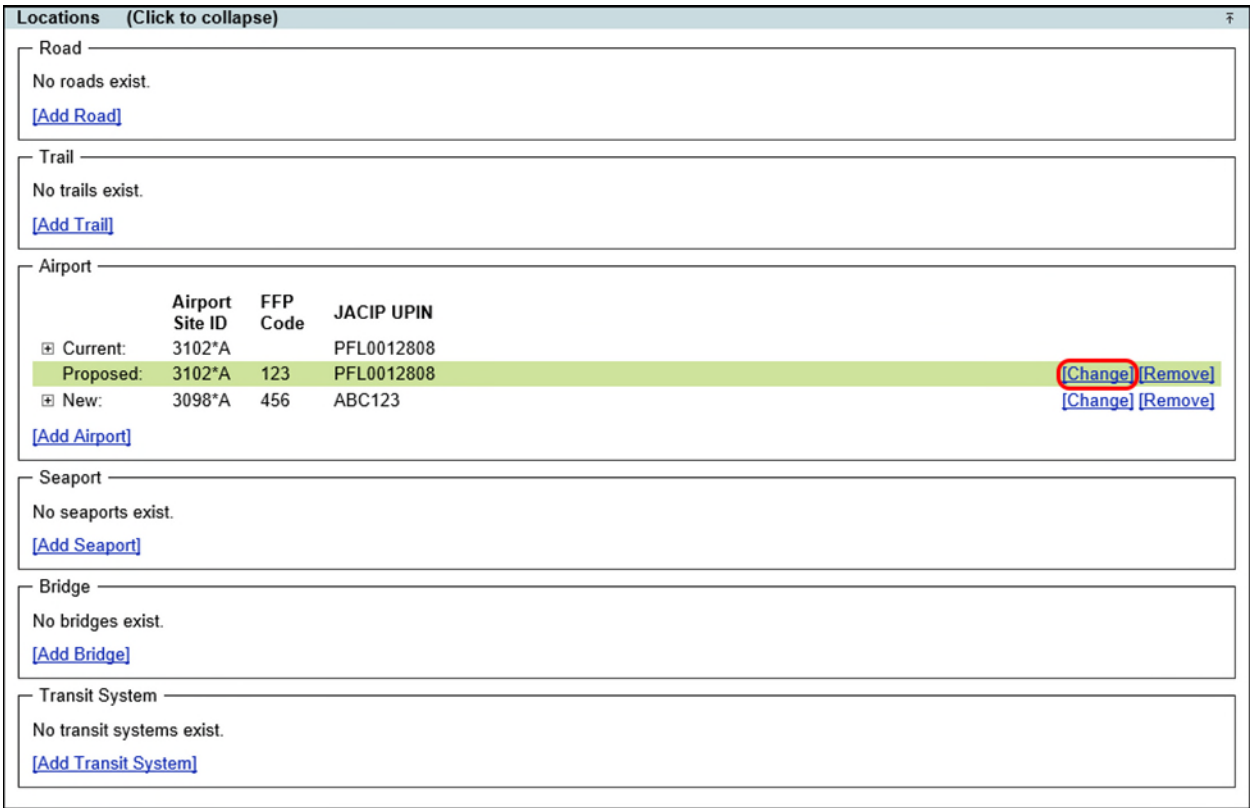
2. Select an airport from the “Airport Site ID” dropdown list. This field is required.
3. Enter an “FFP Code”.
4. Enter a “JACIP UPIN”.
5. Click “Save” to add the airport, or “Cancel” to cancel the action.



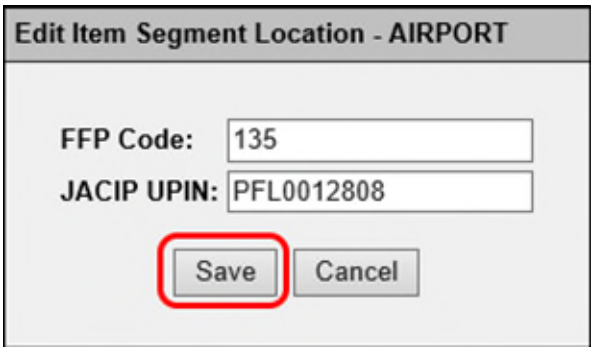
Editing an Airport

The details of an airport location may be modified. To modify the details of an airport, take the following steps:

1. Click the "Change" link next to the desired airport. This will open the "Edit Item Segment Location – AIRPORT" dialog.



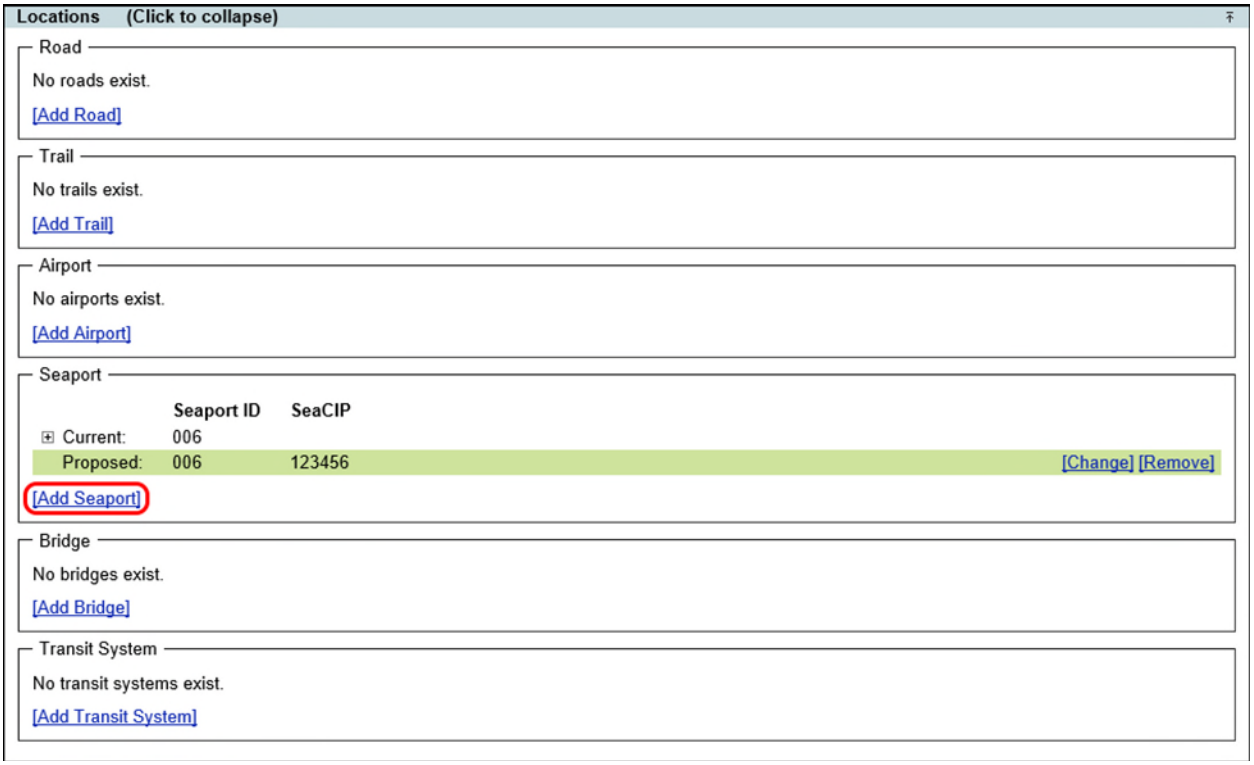
2. Make the necessary modifications to the airport details.
3. Click "Save" to save the changes, or "Cancel" to cancel the action.



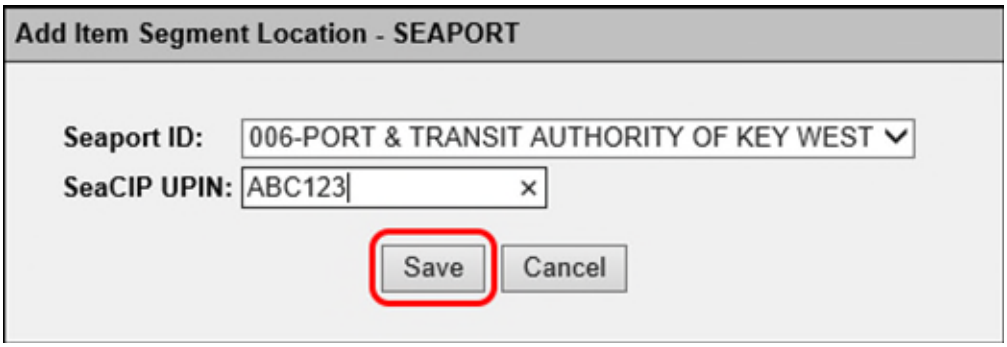
Adding a Seaport

A seaport associated with a project is displayed in the "Seaport" section of the "Locations" panel in the "Project Info" tab. This list shows current/original, proposed, new, and removed seaports. Each seaport may have associated Location Comments and Location Work Mixes. To add an seaport, follow these steps:

1. Click the "Add Seaport" link. This will open the "Add Item Segment Location – SEAPORT" dialog.



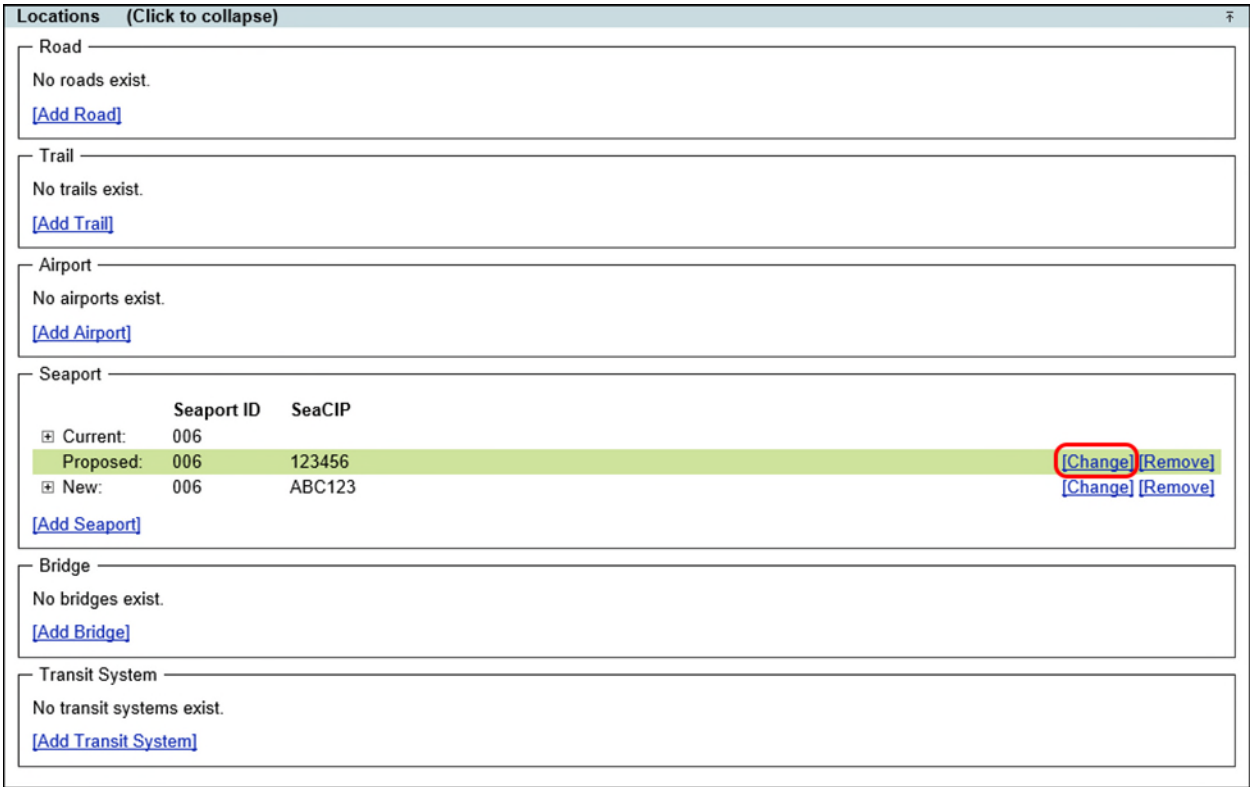
2. Select a seaport from the "Seaport ID" dropdown list. This field is required.
3. Enter a "SeaCIP UPIN".
4. Click "Save" to add the seaport, or "Cancel" to cancel the action.



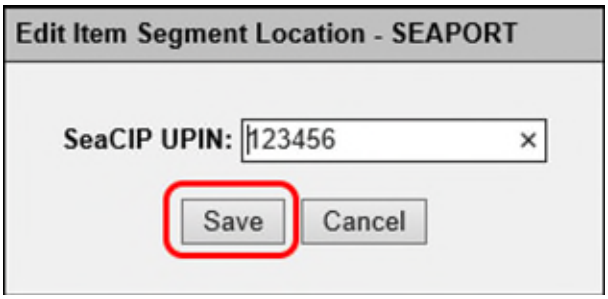
Editing a Seaport

The details of a seaport location may be modified. To modify the details of a seaport, take the following steps:

1. Click the "Change" link next to the desired seaport. This will open the "Edit Item Segment Location – SEAPORT" dialog.



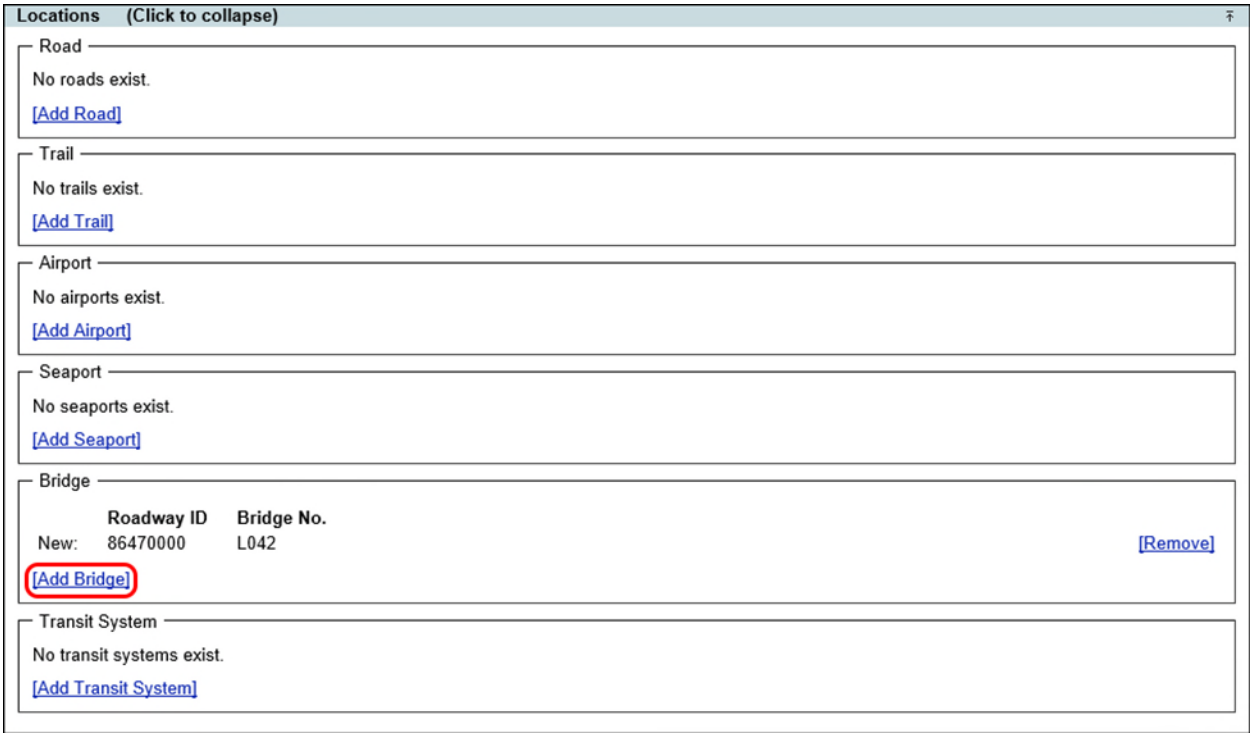
2. Make the necessary modifications to the seaport details.
3. Click "Save" to save the changes, or "Cancel" to cancel the action.



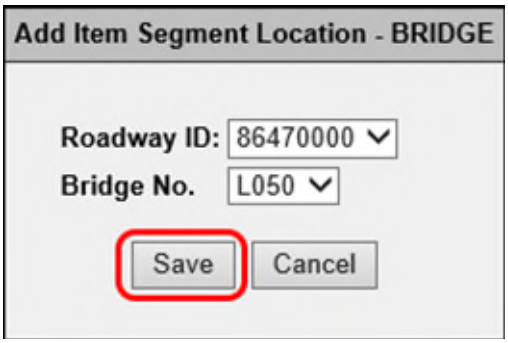
Adding a Bridge

A bridge associated with a project is displayed in the "Bridge" section of the "Locations" panel in the "Project Info" tab. This list shows current/original, proposed, new, and removed bridges. Each bridge may have associated Location Comments and Location Work Mixes. To add a bridge, follow these steps:

1. Click the "Add Bridge" link. This will open the "Add Item Segment Location – BRIDGE" dialog.



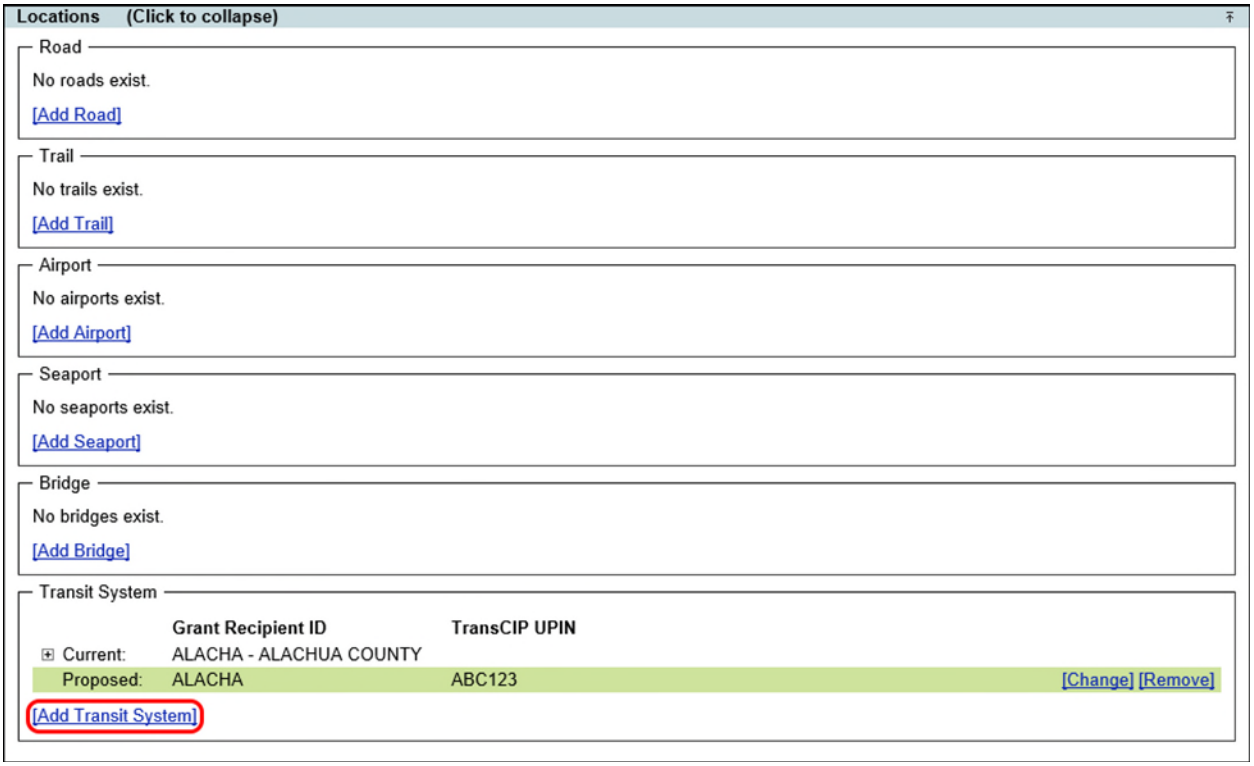
2. Select a roadway from the "Roadway ID" dropdown list. This field is required.
3. Select a bridge from the "Bridge No." dropdown list. This field is required.
4. Click "Save" to add the bridge, or "Cancel" to cancel the action.



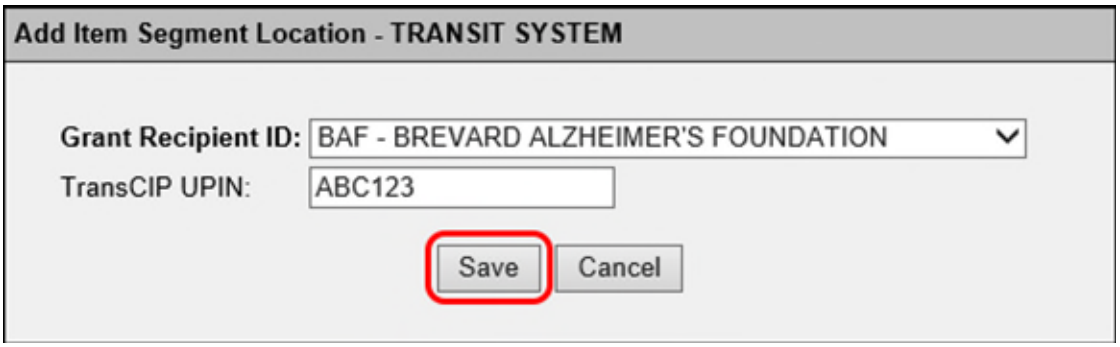
Adding a Transit System

A transit system associated with a project is displayed in the "Transit System" section of the "Locations" panel in the "Project Info" tab. This list shows current/original, proposed, new, and removed transit systems. Each transit system may have associated Location Comments and Location Work Mixes. To add a transit system, follow these steps:

1. Click the "Add Transit System" link. This will open the "Add Item Segment Location – TRANSIT SYSTEM" dialog.



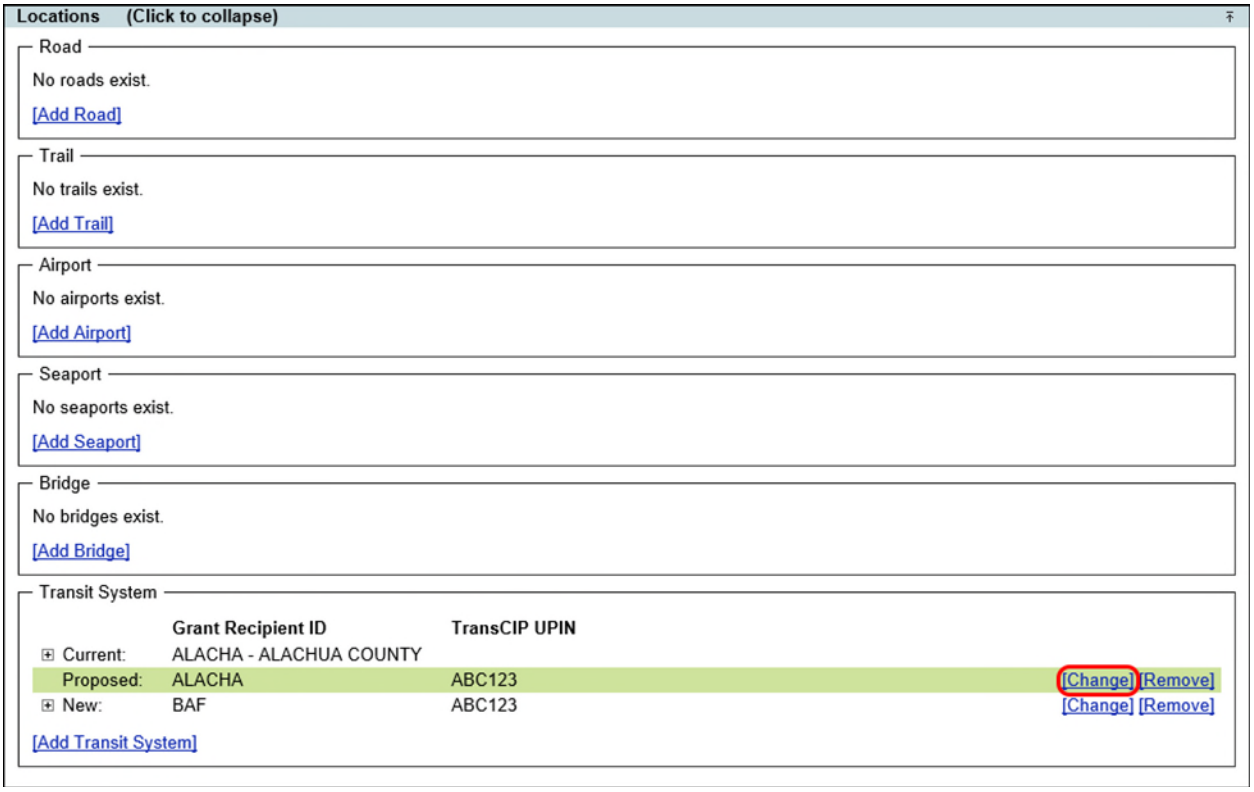
2. Select a grant recipient from the "Grant Recipient ID" dropdown list. This field is required.
3. Enter a "TransCIP UPIN".
4. Click "Save" to add the transit system, or "Cancel" to cancel the action.



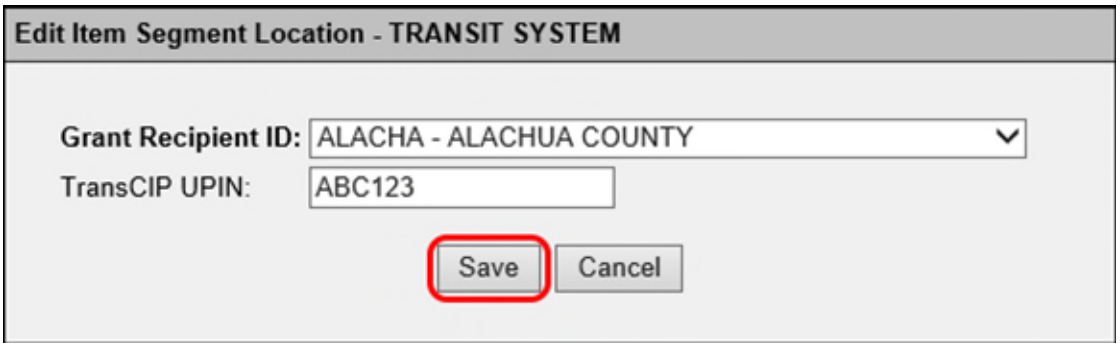
Editing a Transit System

The details of a transit system location may be modified. To modify the details of a transit system, take the following steps:

1. Click the "Change" link next to the desired transit system. This will open the "Edit Item Segment Location – TRANSIT SYSTEM" dialog.



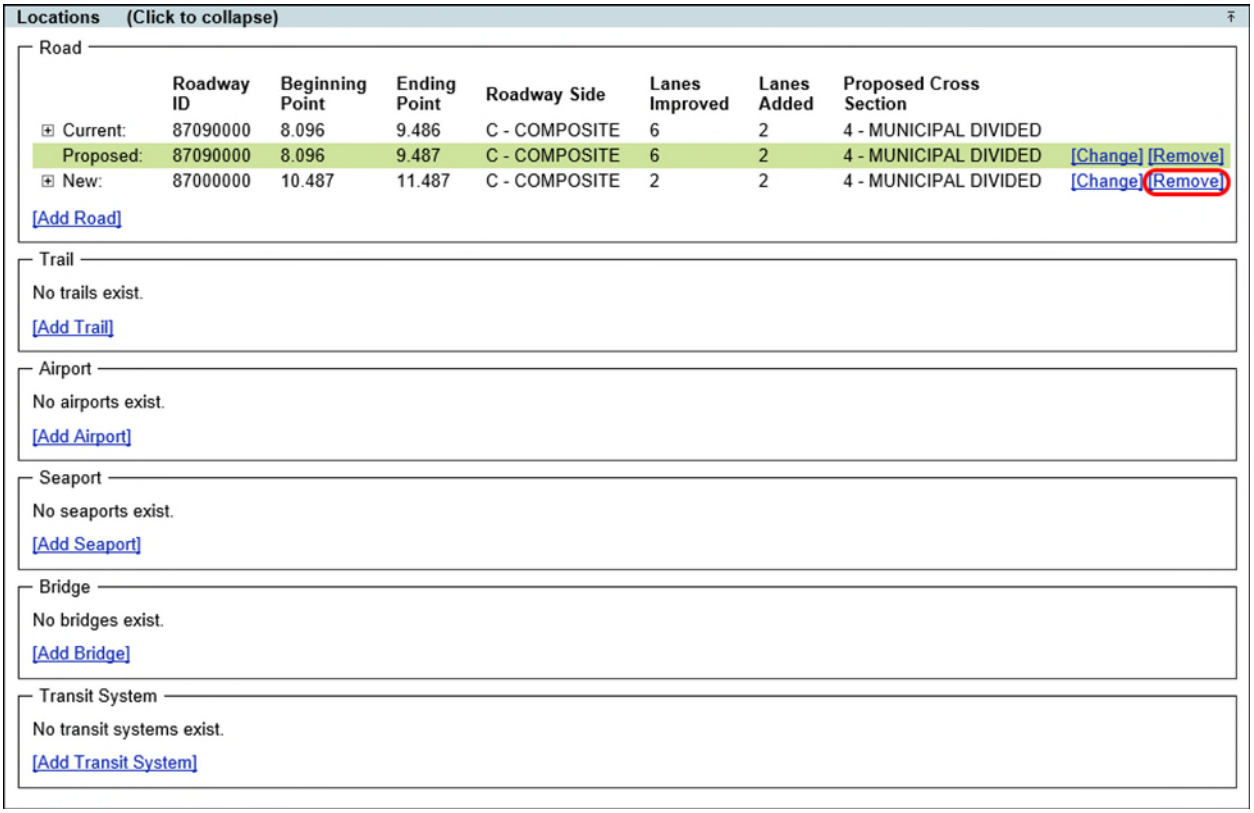
2. Make the necessary modifications to the transit system details.
3. Click "Save" to save the changes, or "Cancel" to cancel the action.



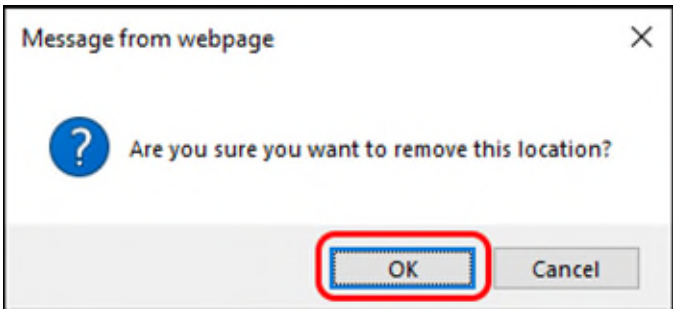
Removing a Location

A current or proposed location may need to be removed from a project. To remove location, do the following:

1. Click “Remove” next to the desired location. This will open a confirmation dialog.

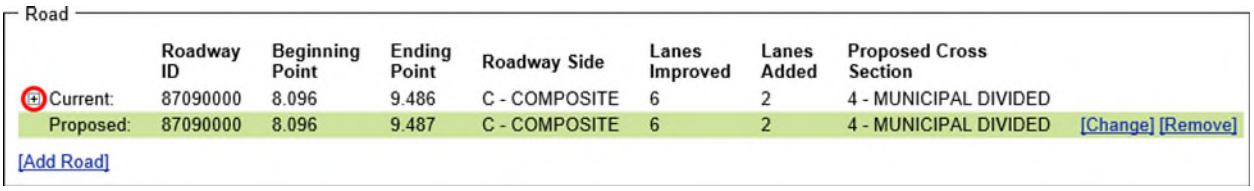


2. Confirm that this location is to be removed. Click “OK” to remove, or “Cancel” to cancel the action.



Viewing Location Comments

Each location may have associated location comments. To view the comments for a location, click the "plus" symbol to expand and view the list of comments.

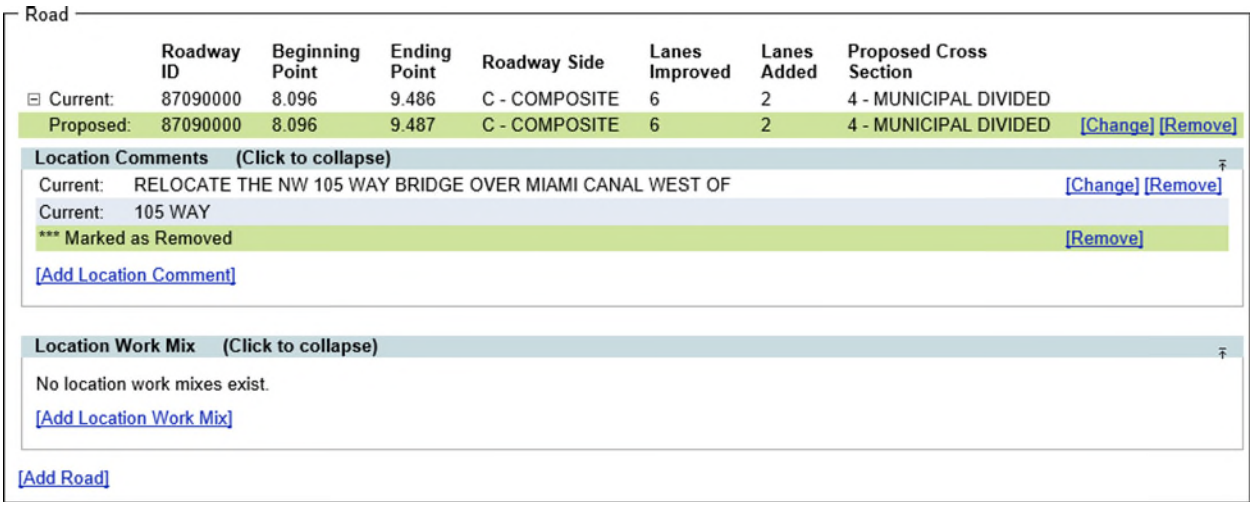


Road

	Roadway ID	Beginning Point	Ending Point	Roadway Side	Lanes Improved	Lanes Added	Proposed Cross Section	
⊞ Current:	87090000	8.096	9.486	C - COMPOSITE	6	2	4 - MUNICIPAL DIVIDED	
Proposed:	87090000	8.096	9.487	C - COMPOSITE	6	2	4 - MUNICIPAL DIVIDED	[Change] [Remove]

[Add Road]

The "Location Comments" panel will display the current, proposed, and removed comments for the corresponding location.



Road

	Roadway ID	Beginning Point	Ending Point	Roadway Side	Lanes Improved	Lanes Added	Proposed Cross Section	
⊟ Current:	87090000	8.096	9.486	C - COMPOSITE	6	2	4 - MUNICIPAL DIVIDED	
Proposed:	87090000	8.096	9.487	C - COMPOSITE	6	2	4 - MUNICIPAL DIVIDED	[Change] [Remove]

Location Comments (Click to collapse)

Current: RELOCATE THE NW 105 WAY BRIDGE OVER MIAMI CANAL WEST OF [Change] [Remove]

Current: 105 WAY

*** Marked as Removed [Remove]

[Add Location Comment]

Location Work Mix (Click to collapse)

No location work mixes exist.

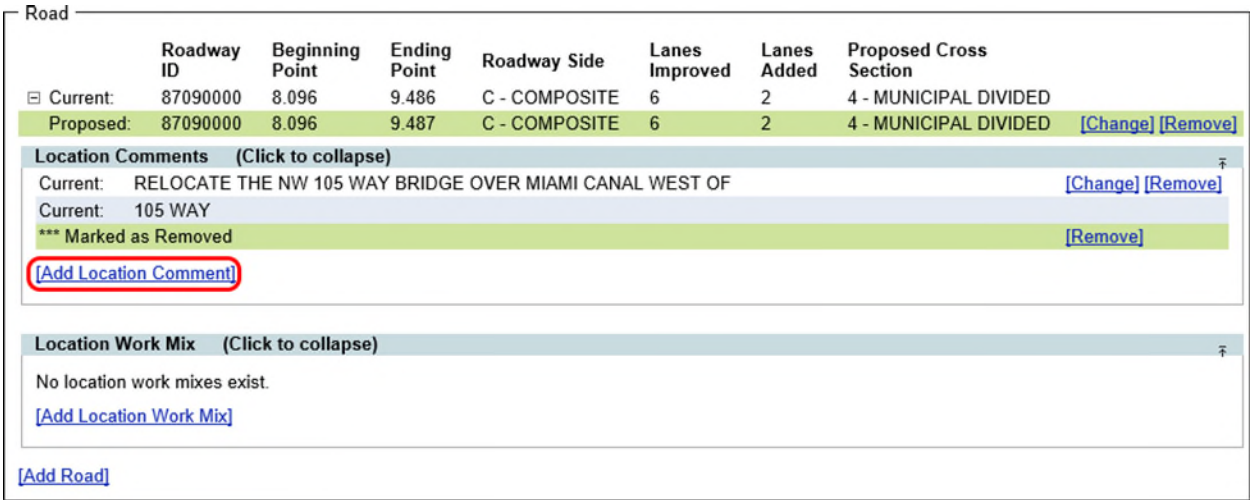
[Add Location Work Mix]

[Add Road]

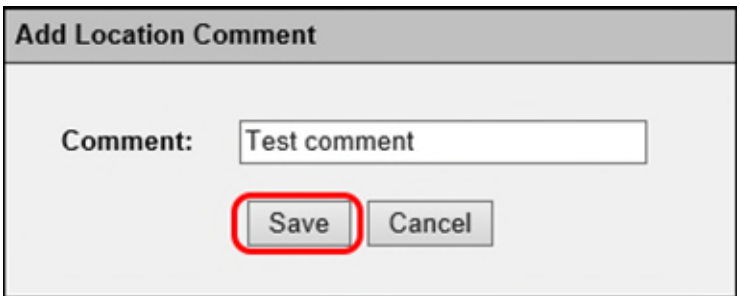
Adding a Location Comment

Comments may be added to a location listed in the "Locations" panel of the "Project Info" tab . To add a location comment, follow these steps:

1. Click the "Add Location Comment" link. This will open the "Add Location Comment" dialog.



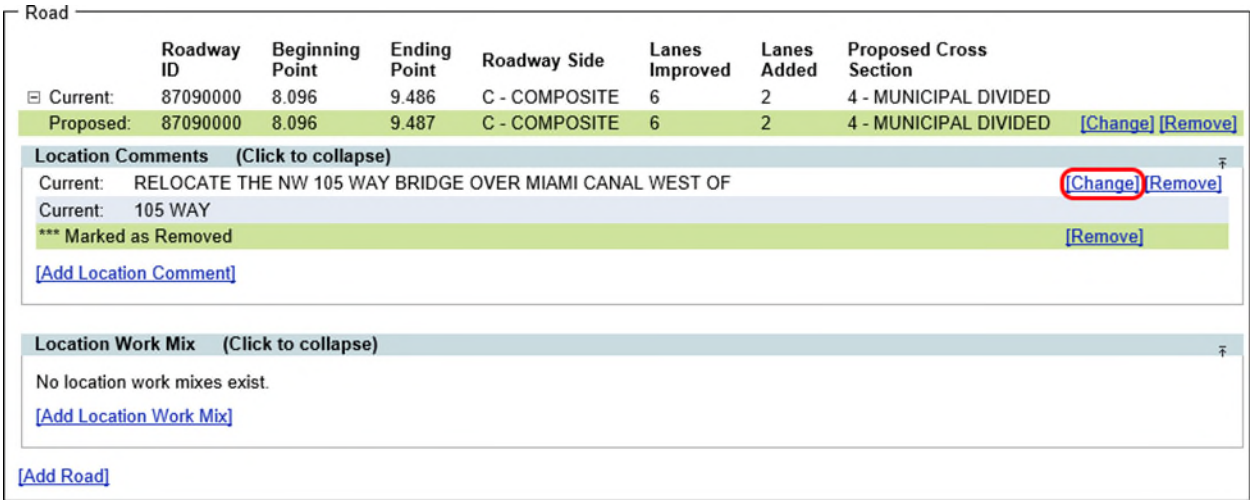
2. Enter a comment in the "Comment" field.
3. Click "Save" to add the location comment, or "Cancel" to cancel the action.



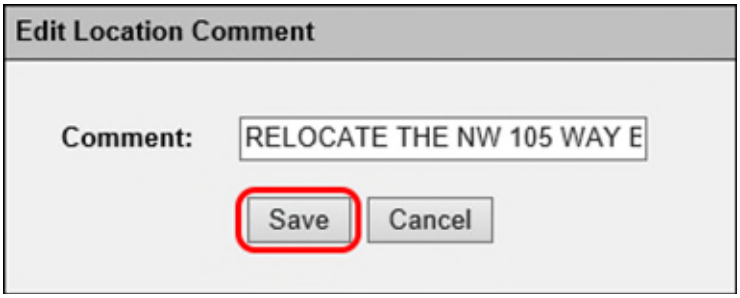
Editing a Location Comment

Location comments may be edited by an authorized user. To edit a current, proposed, or new location comment, do the following:

1. Click the "Change" link next to the desired comment. This will open the "Edit Location Comment" dialog.



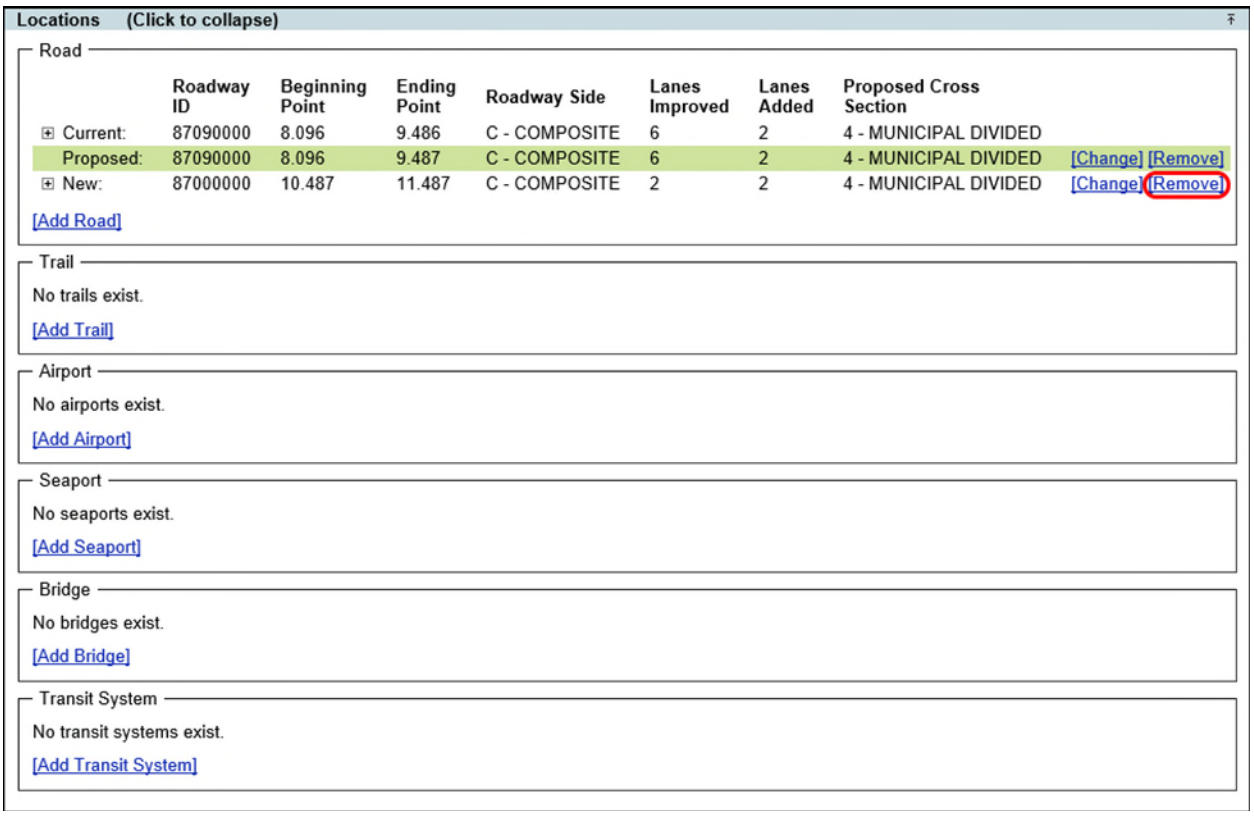
2. Modify the comment.
3. Click “Save” to save the changes, or “Cancel” to cancel the action



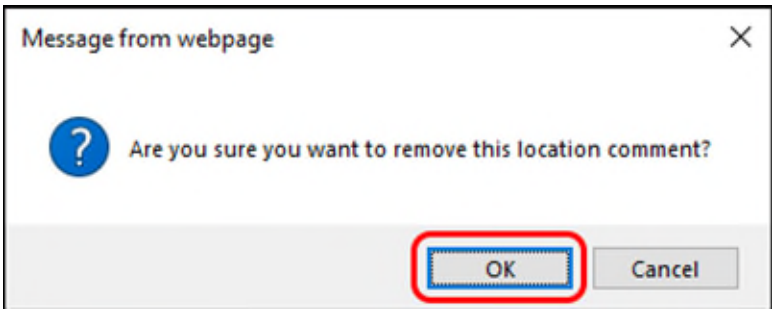
Removing a Location Comment

Current, proposed, or new location comments may be removed from a location. To remove a location comment, take the following steps:

1. Click “Remove” next to the desired location comment. This will open a confirmation dialog.

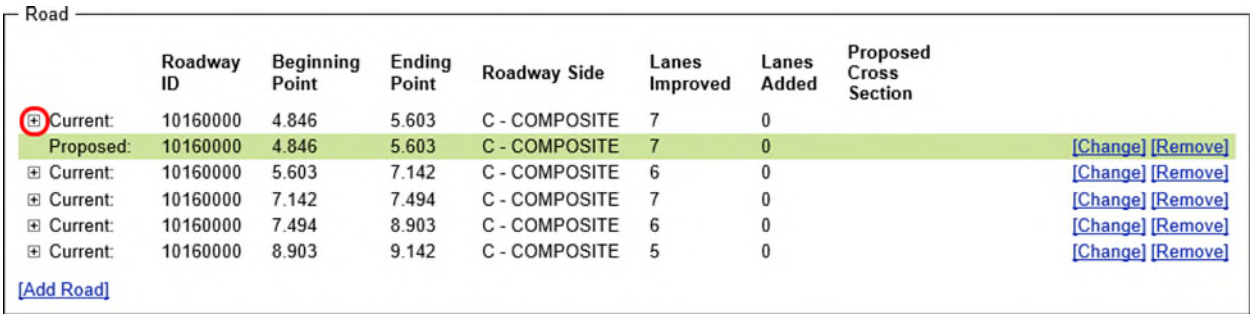


2. Confirm that this location comment is to be removed. Click “OK” to remove, or “Cancel” to cancel the action.



Viewing Location Work Mixes

Each location may have associated work mixes. To view the work mixes for a location, click the "plus" symbol to expand and view the list of work mixes.

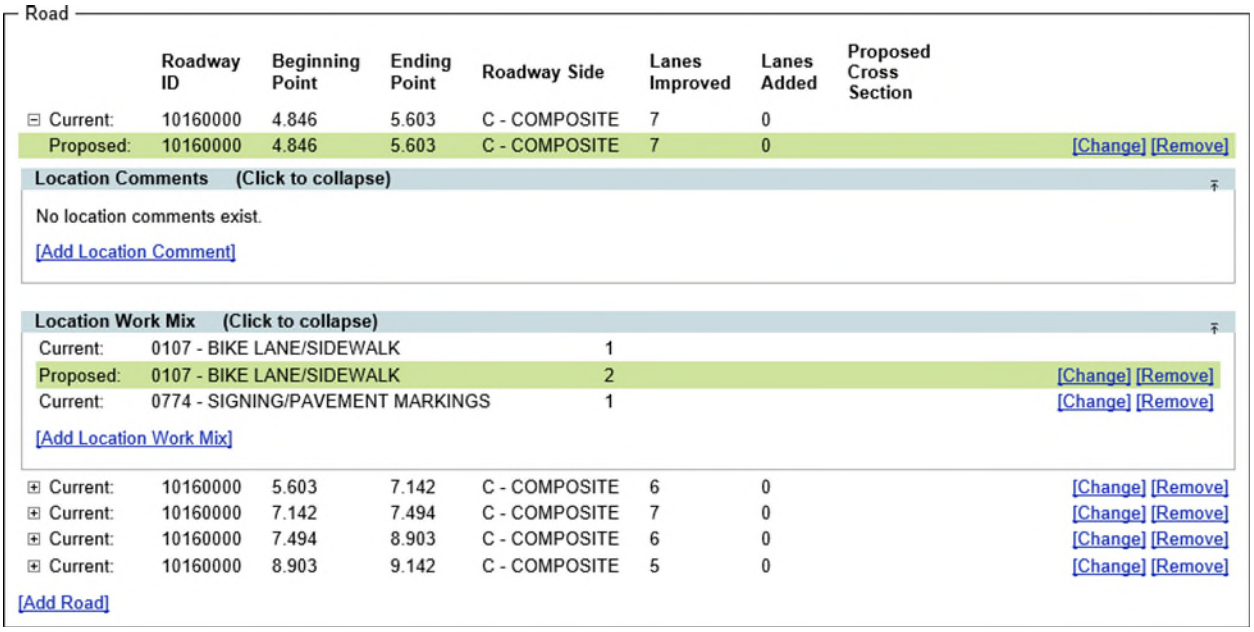


Road

	Roadway ID	Beginning Point	Ending Point	Roadway Side	Lanes Improved	Lanes Added	Proposed Cross Section	
⊞ Current:	10160000	4.846	5.603	C - COMPOSITE	7	0		
Proposed:	10160000	4.846	5.603	C - COMPOSITE	7	0		[Change] [Remove]
⊞ Current:	10160000	5.603	7.142	C - COMPOSITE	6	0		[Change] [Remove]
⊞ Current:	10160000	7.142	7.494	C - COMPOSITE	7	0		[Change] [Remove]
⊞ Current:	10160000	7.494	8.903	C - COMPOSITE	6	0		[Change] [Remove]
⊞ Current:	10160000	8.903	9.142	C - COMPOSITE	5	0		[Change] [Remove]

[Add Road]

The "Location Work Mixes" panel will display the current, proposed, and removed work mixes for the corresponding location.



Road

	Roadway ID	Beginning Point	Ending Point	Roadway Side	Lanes Improved	Lanes Added	Proposed Cross Section	
⊟ Current:	10160000	4.846	5.603	C - COMPOSITE	7	0		
Proposed:	10160000	4.846	5.603	C - COMPOSITE	7	0		[Change] [Remove]

Location Comments (Click to collapse)

No location comments exist.

[Add Location Comment]

Location Work Mix (Click to collapse)

Current:	0107 - BIKE LANE/SIDEWALK	1	
Proposed:	0107 - BIKE LANE/SIDEWALK	2	[Change] [Remove]
Current:	0774 - SIGNING/PAVEMENT MARKINGS	1	[Change] [Remove]

[Add Location Work Mix]

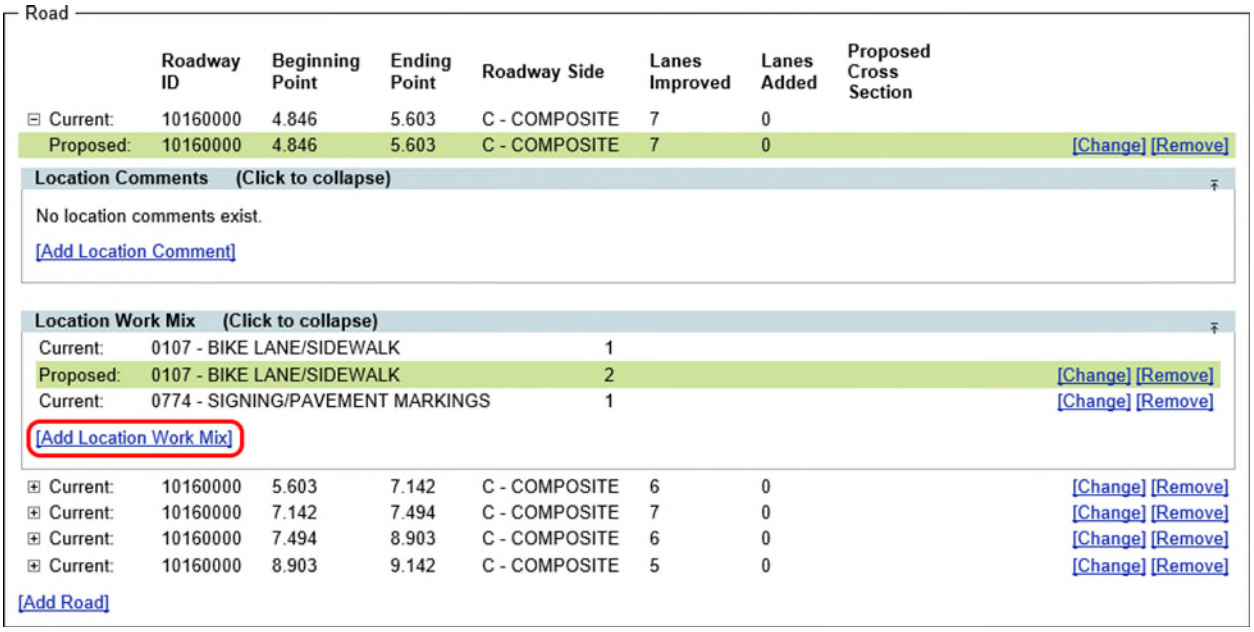
⊞ Current:	10160000	5.603	7.142	C - COMPOSITE	6	0		[Change] [Remove]
⊞ Current:	10160000	7.142	7.494	C - COMPOSITE	7	0		[Change] [Remove]
⊞ Current:	10160000	7.494	8.903	C - COMPOSITE	6	0		[Change] [Remove]
⊞ Current:	10160000	8.903	9.142	C - COMPOSITE	5	0		[Change] [Remove]

[Add Road]

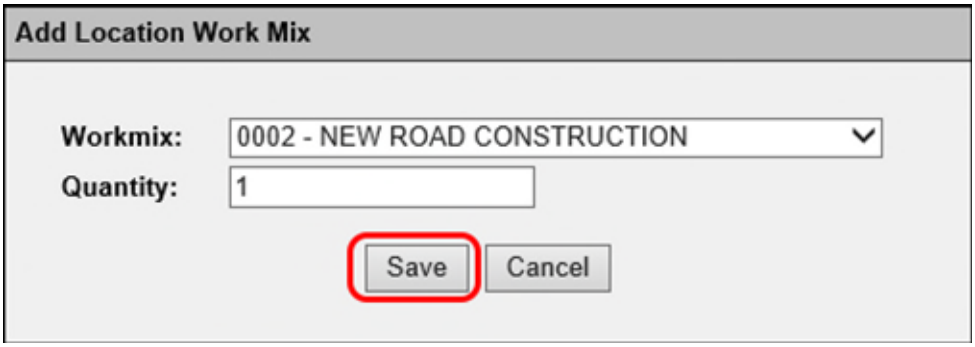
Adding a Location Work Mix

Work mixes may be added to a location listed in the "Locations" panel of the "Project Info" tab . To add a location work mix, follow these steps:

1. Click the “Add Location Work Mix” link. This will open the “Add Location Work Mix” dialog.



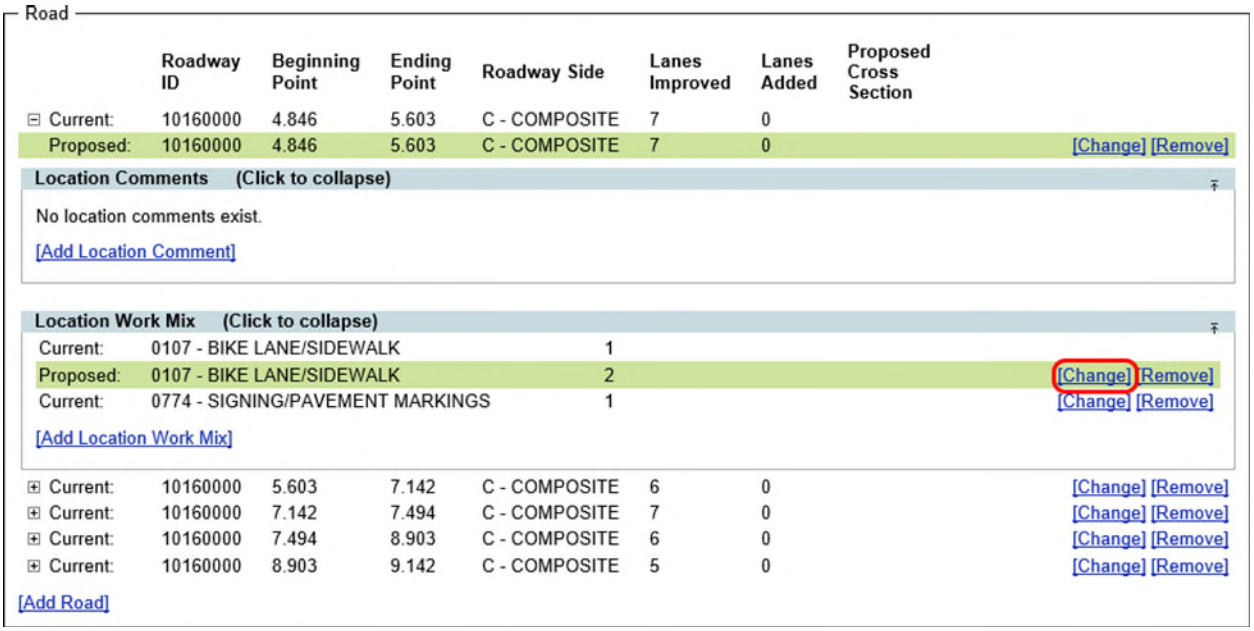
2. Select a work mix from the “Workmix” dropdown list. This field is required.
3. Enter a number in the “Quantity” field. This field is required.
4. Click “Save” to add the location work mix, or “Cancel” to cancel the action.



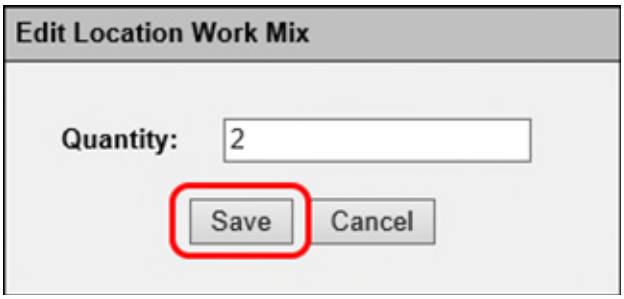
Editing a Location Work Mix

Location work mixes may be edited by an authorized user. To edit a current, proposed, or new location work mix, do the following:

1. Click the “Change” link next to the desired work mix. This will open the “Edit Location Work Mix” dialog.



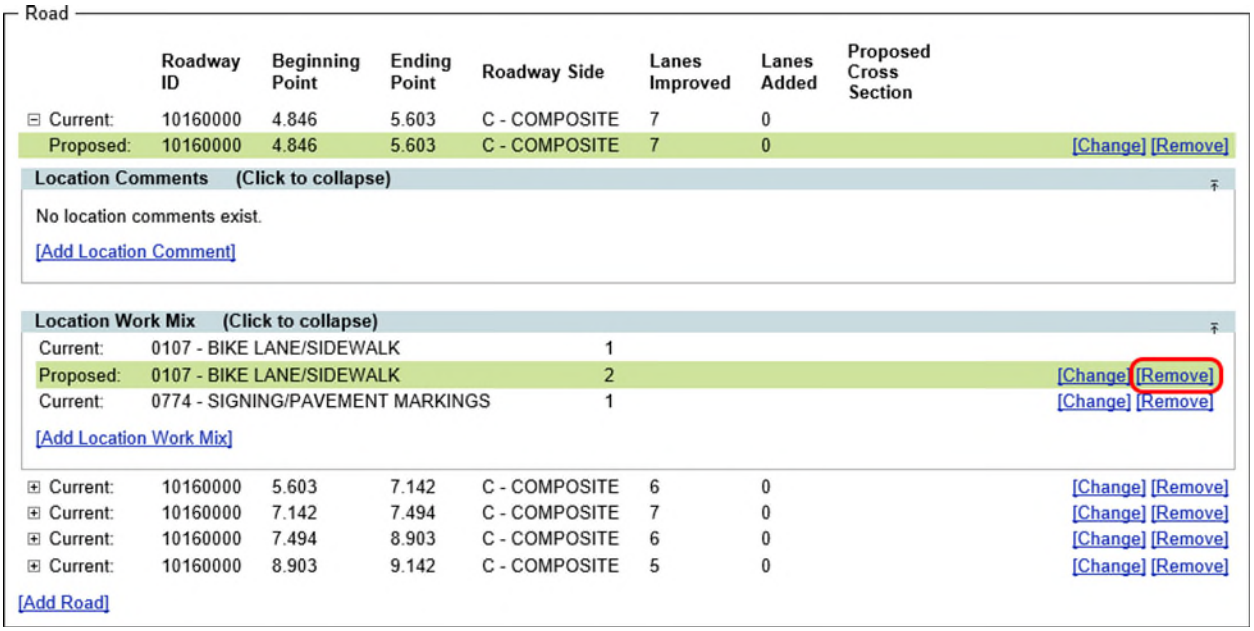
2. Modify the quantity.
3. Click “Save” to save the changes, or “Cancel” to cancel the action



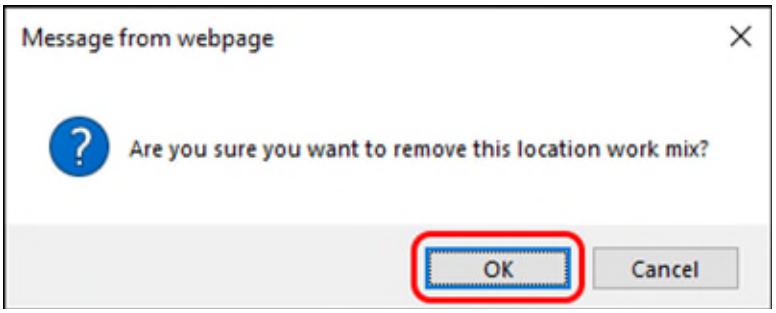
Removing a Location Work Mix

Current, proposed, or new location work mixes may be removed from a location. To remove a location work mix, take the following steps:

1. Click “Remove” next to the desired location work mix. This will open a confirmation dialog.



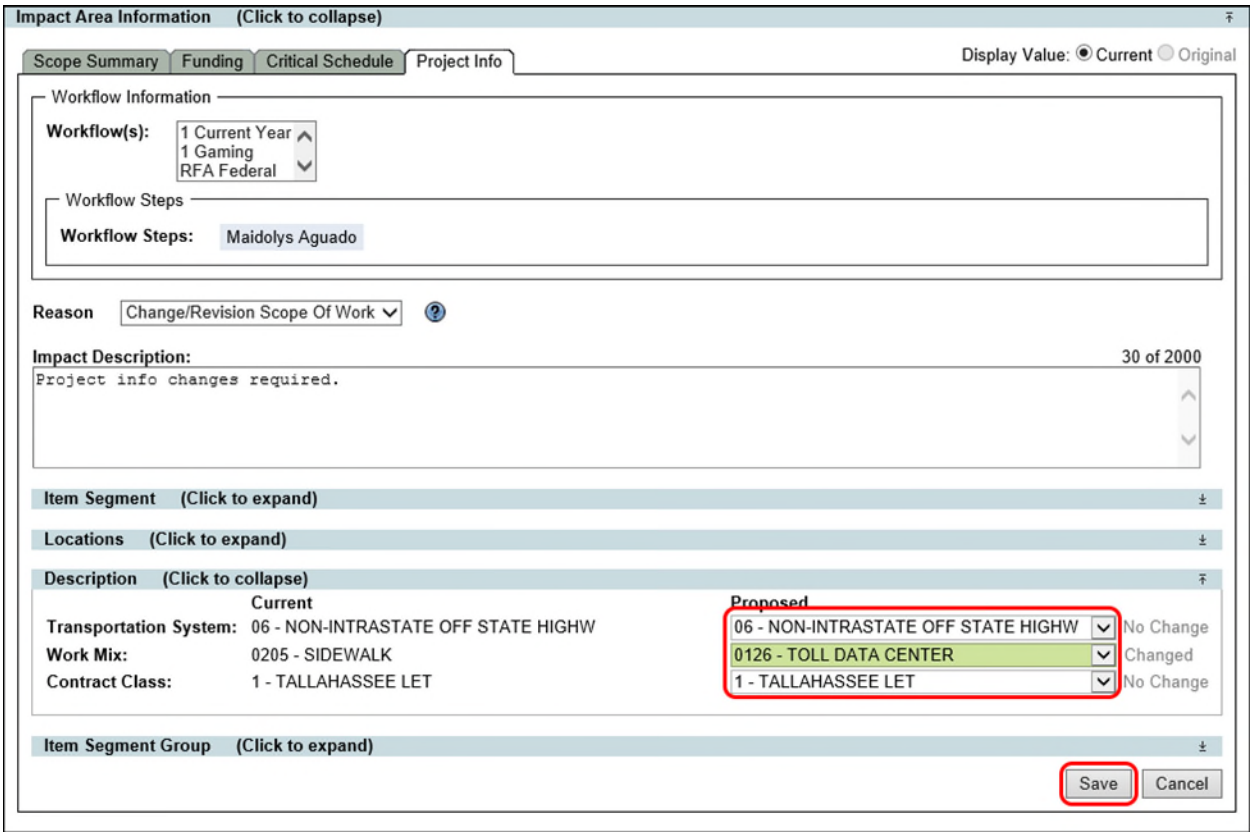
2. Confirm that this location work mix is to be removed. Click “OK” to remove, or “Cancel” to cancel the action.



Modifying Description Information

The “Description” panel in the “Project Info” impact area tab displays current/original and proposed values for the Transportation System, Work Mix, and Contract Class associated with the project. To edit these items, take the following steps:

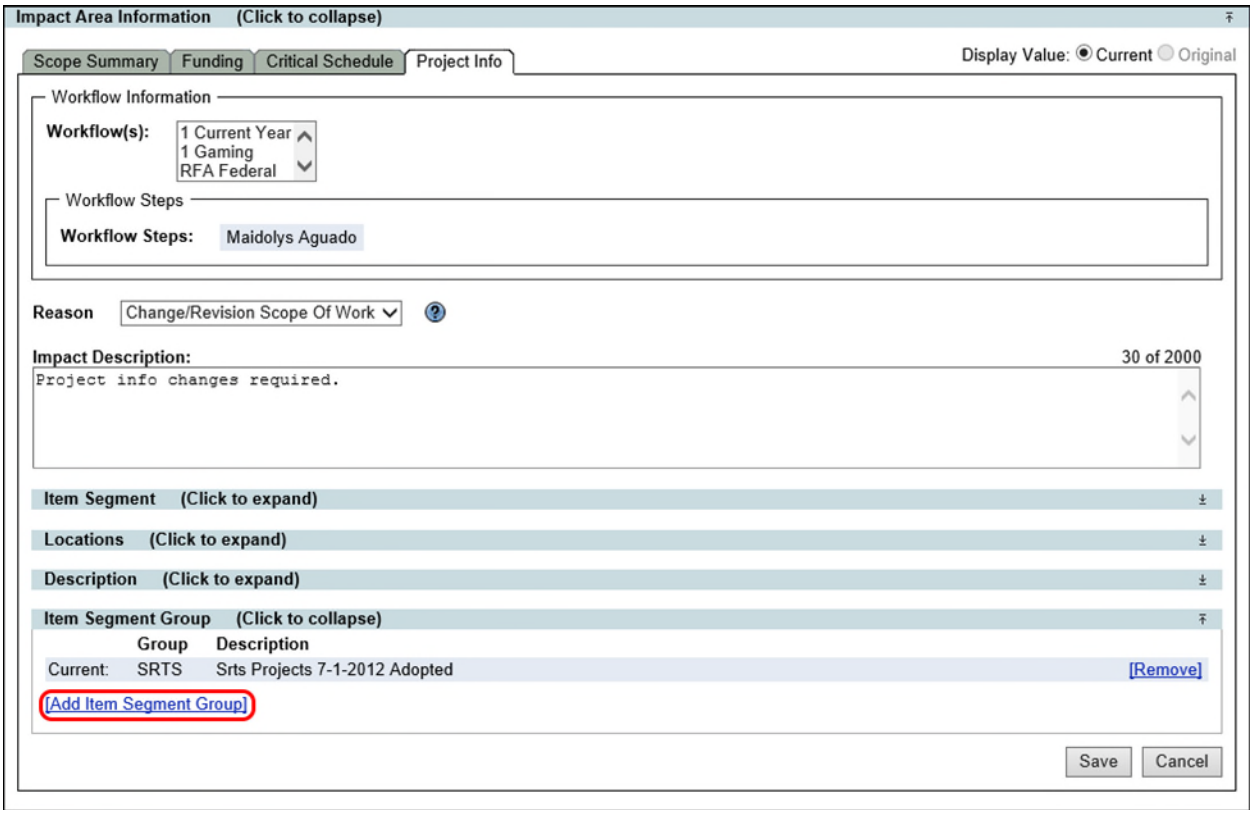
1. Select a transportation system from the proposed “Transporation System” dropdown list.
2. Select a work mix from the proposed “Work Mix” dropdown list.
3. Select a contract class from the proposed “Contract Class” dropdown list.
4. Click “Save” to save the changes, or “Cancel” to cancel the operation.



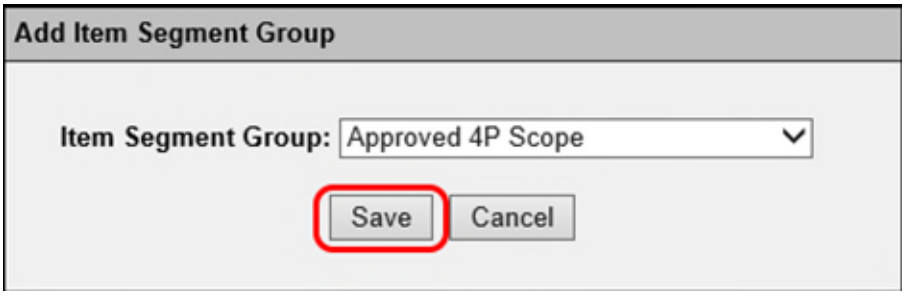
Adding an Item Segment Group

The “Project Info” tab includes a list of current, removed, and new item segment groups displayed in the “Item Segment Group” panel. Item segment groups may be added or removed. To add an item segment group, do the following:

1. Click the “Add Item Segment Group” link at the bottom of the “Item Segment Group” panel. This will open the “Add Item Segment Group” dialog.



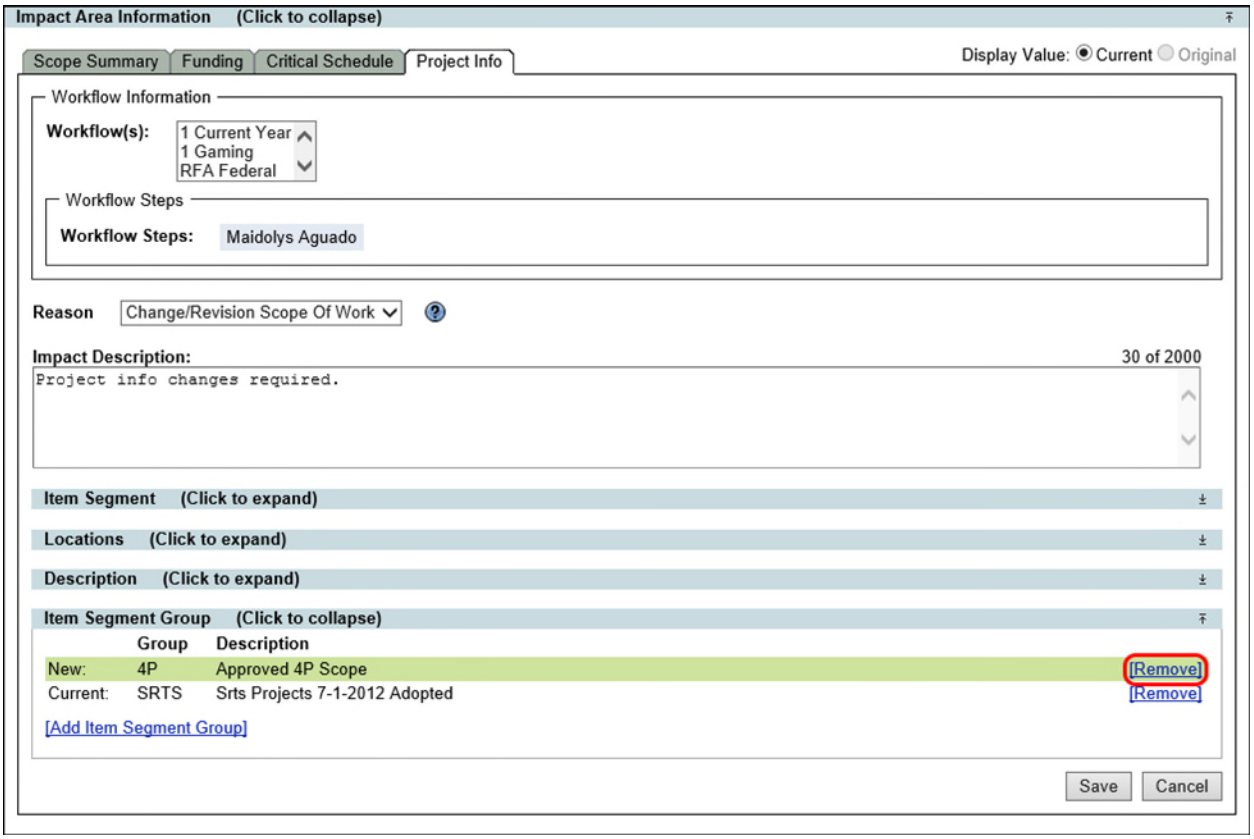
2. Select a group from the “Item Segment Group” dropdown list.
3. Click “Save” to add the item segment group, or “Cancel” to cancel the operation.



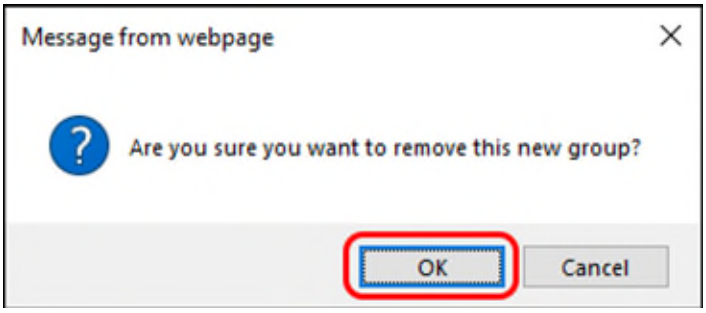
Removing an Item Segment Group

Conversely, Item Segment Groups may be removed from the list. To remove an item segment group, do the following:

1. Click “Remove” next to the desired item segment group. This will open a confirmation dialog.

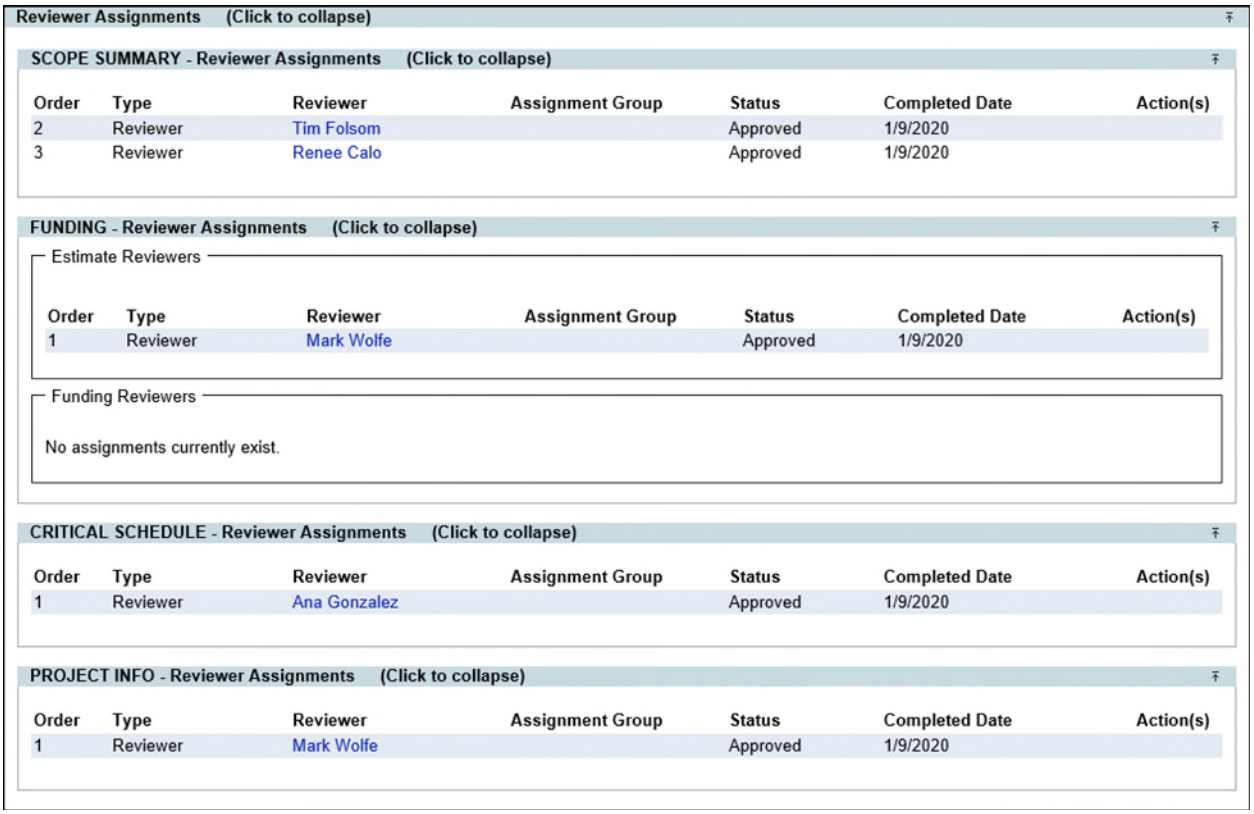


2. Confirm that the item segment group is to be removed. Click “OK” to remove the item segment group, or “Cancel” to cancel the operation.



Reviewer Assignments

A Change Request Package includes a “Reviewer Assignments” panel, which displays the reviewer assignments for each impact area included in the Change Request Package. When an impact area is added to a Change Request Package and a named Workflow (if available) is selected, the reviewers in the Workflow are added to the corresponding “Reviewer Assignments” panel. When the status of a Change Request Package is in Draft, Revision, or Review, an authorized user may add or remove reviewers. When a Change Request Package is in Review, the currently assigned reviewer may add comments, approve, or reject the Change Request Package.



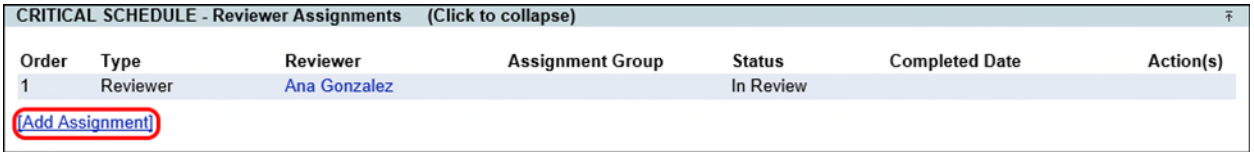
Editing Assignments

An authorized user may modify reviewer assignments for a Change Request Package. The Project Manager is given this privilege by default. Other users must request the corresponding "Manage Assignment" privilege for the affected Impact Area. For more information on requesting privileges, please read the Privileges and Notifications Help Document.

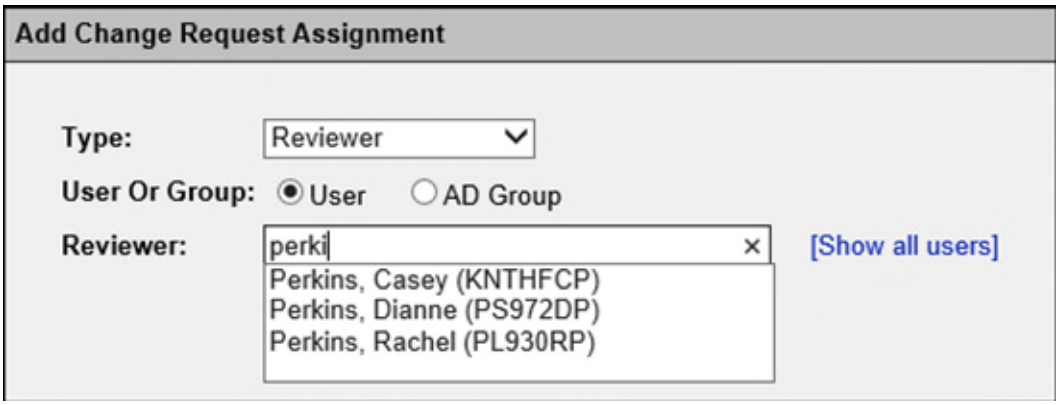
Adding an Assignment

An authorized user may add reviewer assignments to an impact area within a Change Request Package. To add an additional reviewer assignment, follow these steps:

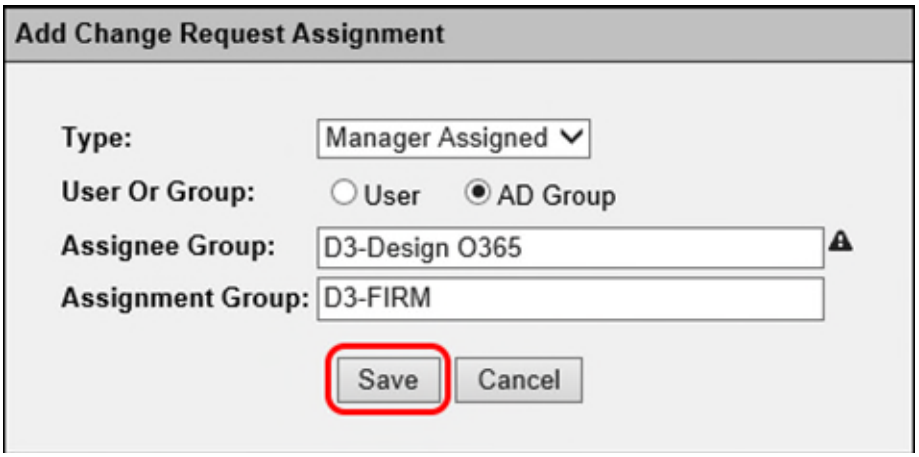
1. Click on the "Add Assignment" link. This will open the "Add Change Request Assignment" dialog.



2. Select an assignment type from the "Type" dropdown list and choose "User" or "Group". Begin typing in the "Reviewer/Assignee Group" field and select an option from the dropdown list. Additionally, if the selected "Type" is "Manager Assigned", select an Assignment Group.



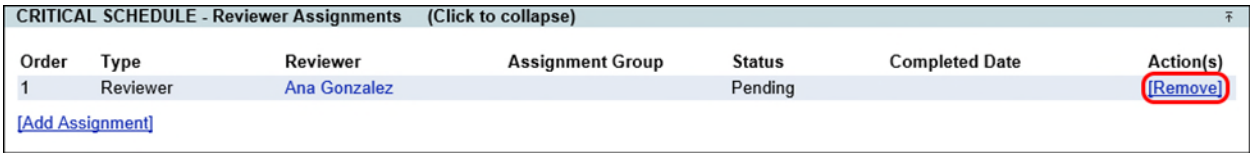
3. Click “Save” to add the reviewer, or “Cancel” to close the window without adding a new reviewer.



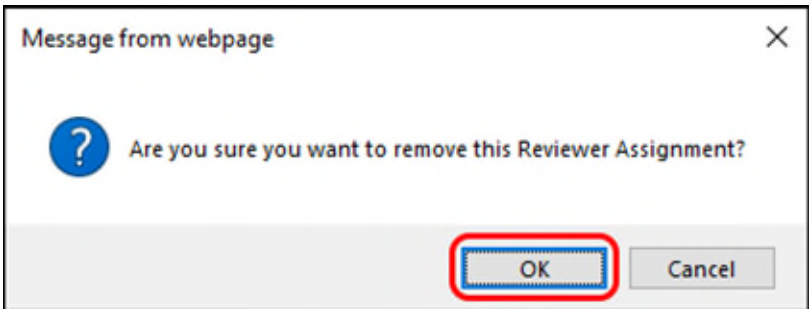
Removing an Assignment

A Project Manager or a user with the proper “Manage Assignment” privilege may remove reviewer assignments from a Change Request Package. To remove a reviewer assignment from a Change Request Package, follow these steps:

1. Click on the “Remove” link to the right of the reviewer assignment to be removed. A confirmation dialog will appear.



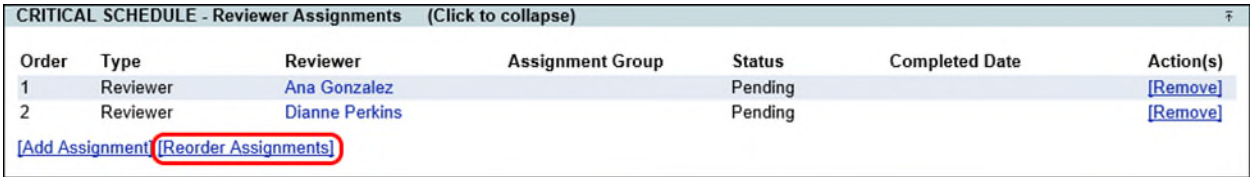
2. Confirm that you wish to remove the assignment. Click “OK” to remove the assignment, or “Cancel” to cancel the operation.



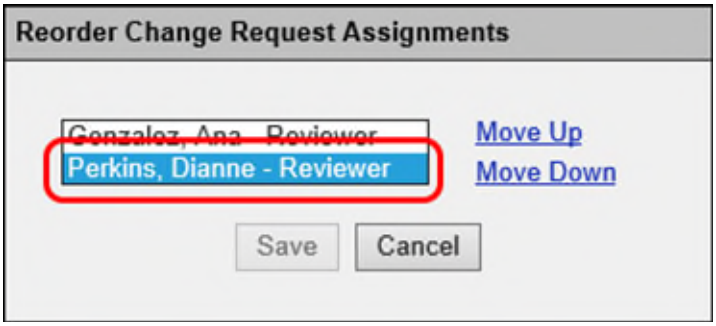
Reordering Assignments

When an impact area contains more than one reviewer assignment, the reviewer assignments may be reordered in the following way:

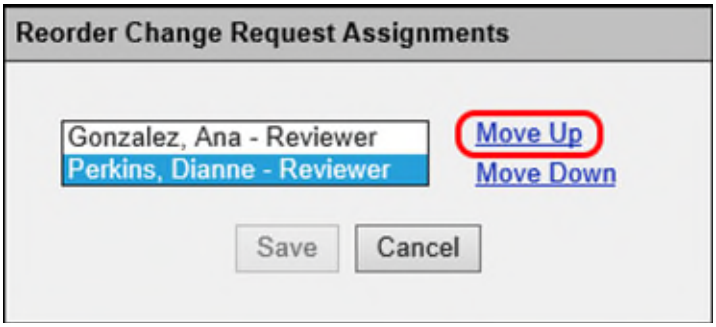
1. Click on the "Reorder Assignments" link at the bottom of a "Reviewer Assignments" panel.



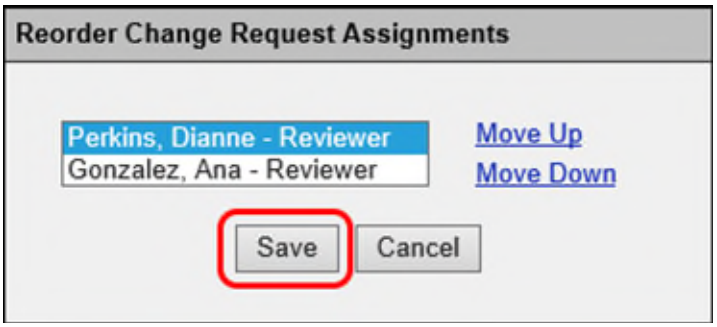
2. Select a reviewer from the list.



3. Click the "Move Up" link or the "Move Down" link to change the review order.



4. Click "Save" to save your changes, or "Cancel" to close the window without saving.

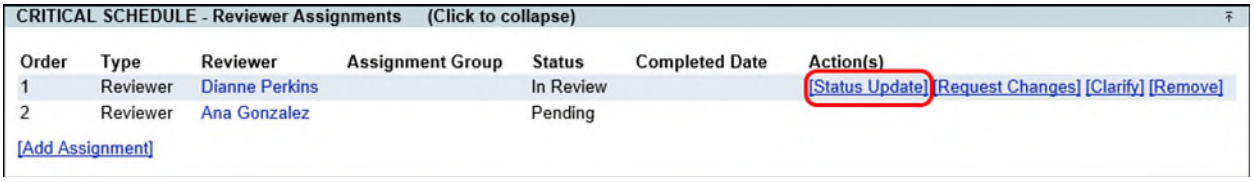


Note: Reviewer assignments may be added or removed while their status is set to Pending. This is true even while the Change Request Package status is In Review.

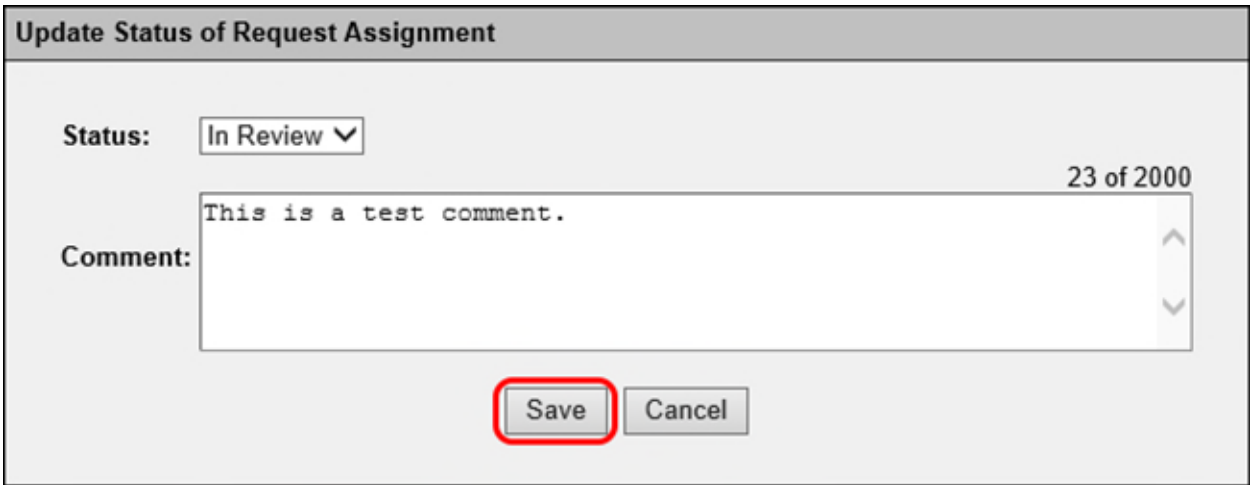
Adding Comments

When a Change Request Package is in review, a reviewer may add comments, approve, reject, request changes, or ask for clarification. To add comments, perform the following:

1. Click on the "Status Update" link to the right of the assignment.



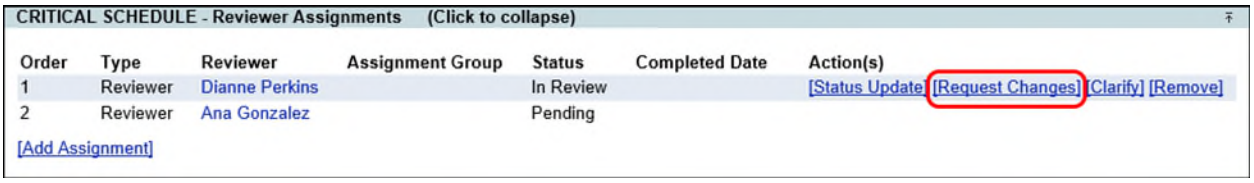
2. Select "In Review" from the "Status" dropdown list, enter a comment, and click "Save" to add the comment. Click "Cancel" to cancel the operation.



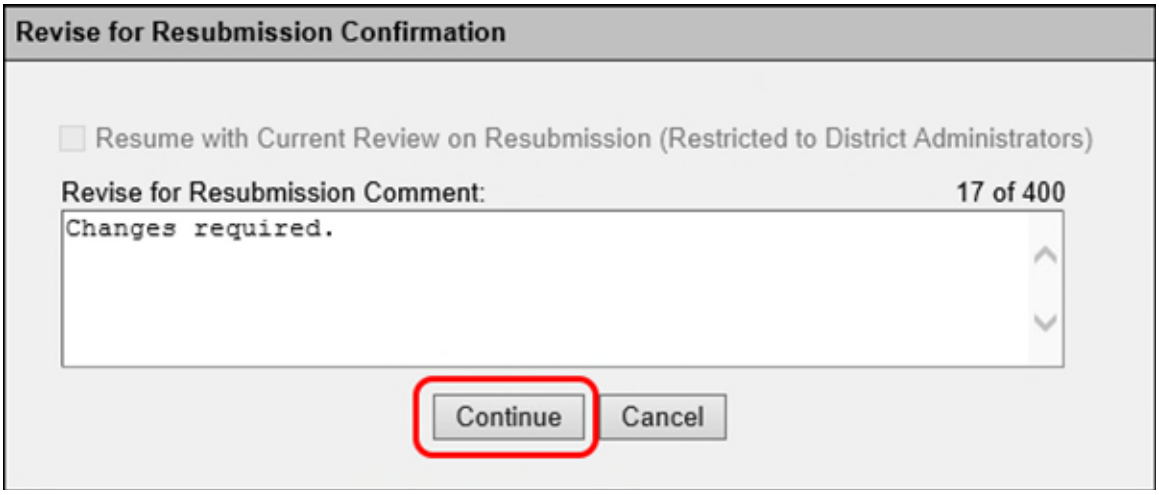
Requesting Changes

When more information is necessary to continue a review, a reviewer may request changes. The Project Manager may then revise the Change Request Package and resubmit. To request changes, do the following:

1. Click on the "Request Changes" link to the right of the assignment. This will open the "Revise for Resubmission Confirmation" dialog.



2. Enter a comment specifying what changes are required and click “Continue” to confirm. Click “Cancel” to cancel the operation.

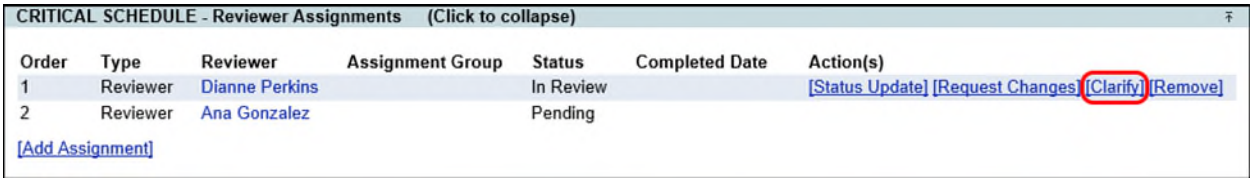


Note: This will change the status of the Change Request Package to Revision, and all reviewer assignments will revert to Pending status.

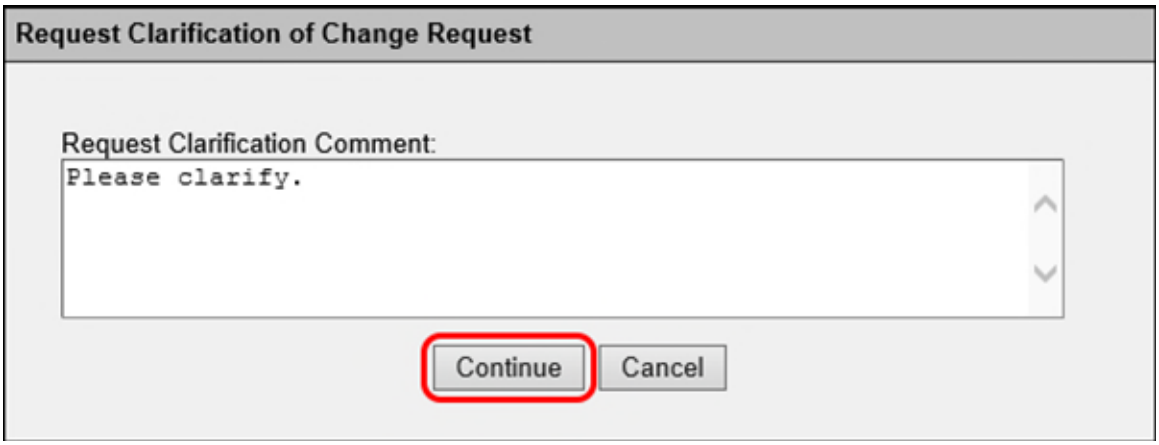
Requesting Clarification

A reviewer may request clarification for a Change Request Package that is in review. Once the Project Manager provides clarification, the review process will continue. To request clarification for a Change Request Package:

1. Click the “Clarify” link to the right of the assignment. This will open the “Request Clarification of Change Request” dialog.



2. Enter a comment and click “Continue” to request clarification. Click “Cancel” to cancel the operation.

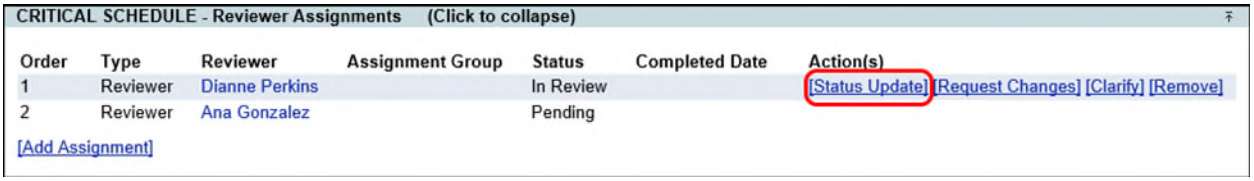


Note: When a clarification request is submitted, the status of the current reviewer assignment is changed to Pending and the status of the Change Request Package is changed to Pending Clarification. When the Project Manager provides the requested clarification, the status of the Change Request Package and the next pending reviewer assignment will be changed back to In Review.

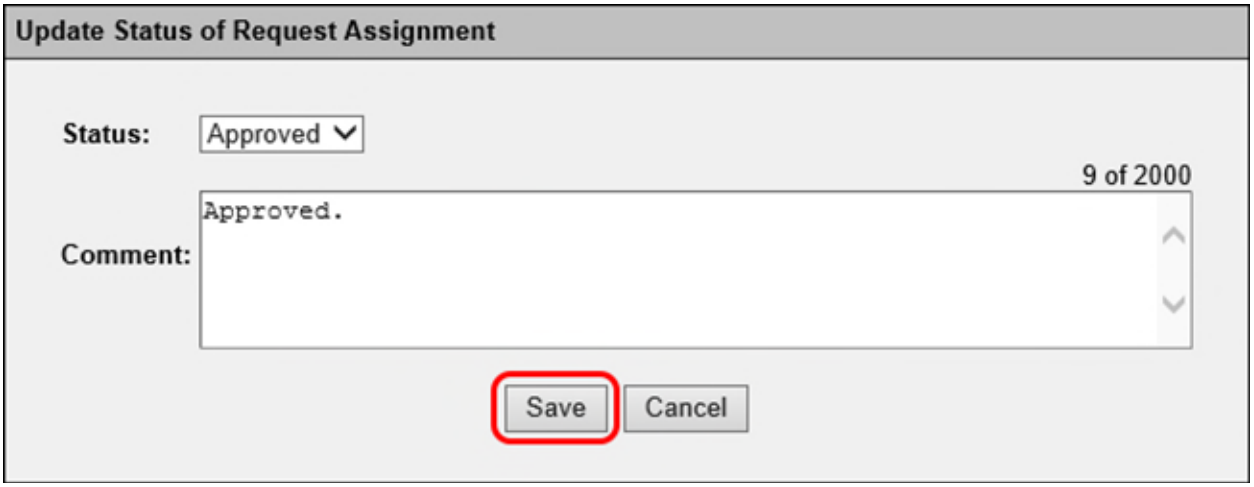
Approving

When a reviewer wishes to approve a Change Request Package, they may do so by following these steps:

1. Click on the "Status Update" link to the right of the assignment. This will open the "Update Status of Request Assignment" dialog.



2. Select "Approved" from the "Status" dropdown, enter a comment, and click "Save" to approve the Change Request Package. Click "Cancel" to cancel the operation.

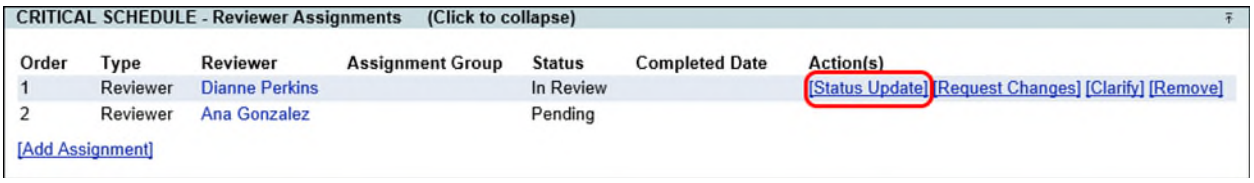


Note: When a reviewer approves a Change Request Package, the next Pending reviewer assignment will be changed to In Review.

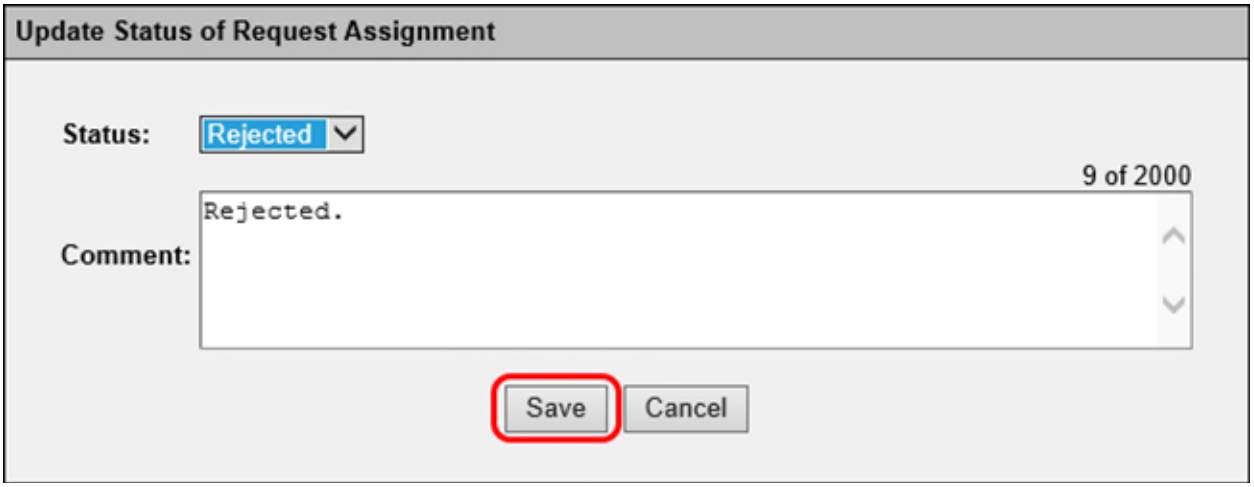
Rejecting

When a reviewer chooses to reject a Change Request Package, they may do so by following these steps:

1. Click on the "Status Update" link to the right of the assignment. This will open a the Update Status of Request Assignment" dialog.



2. Select "Rejected" from the "Status" dropdown list, enter a comment, and click "Save" to approve the Change Request Package. Click "Cancel" to cancel the operation.



Note: When a Change Request Package is rejected, the status of the Change Request Package and corresponding Impact Area will be changed to Rejected and the status of all remaining reviewer assignments will be changed to Closed.

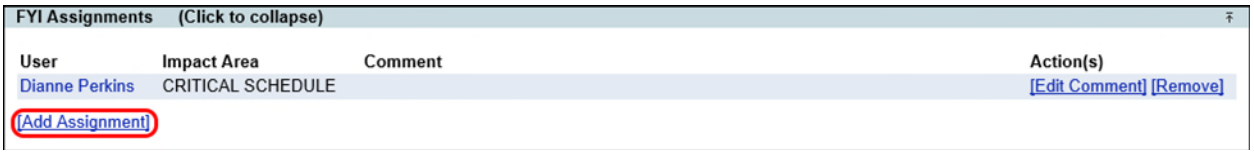
FYI Assignments

The "FYI Assignments" panel contains a list of FYI assignments associated with a Change Request Package. FYI assignees will receive email notifications either, as each review assignment is completed within an Impact Area, or only when the last review assignment is completed, based on their user settings.

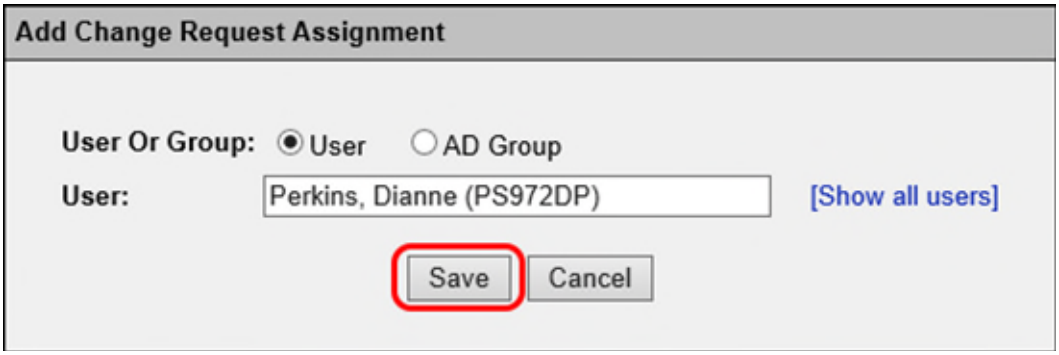
Adding an FYI Assignment

Project Managers are given the ability to add FYI assignments to a Change Request Package when the status of the Change Request Package is Draft, Revision, or In Review. To add an FYI assignment, do the following:

1. Click the “Add Assignment” link at the bottom of the “FYI Assignments” panel. This will open the “Add Change Request Assignment” dialog.



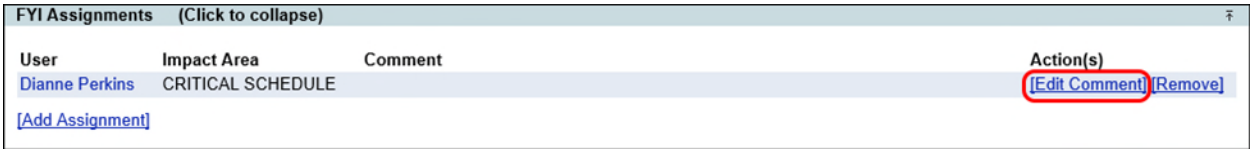
2. Select “User” or “AD Group”. Begin typing in the “User” or “Assignee Group” field and select a name from the dropdown list that appears. Click “Save” to add the FYI assignment, or “Cancel” to cancel the operation.



Editing an FYI Assignment Comment

When a Change Request Package is In Review and a user is the currently assigned reviewer, the FYI assignment comment is editable. To edit the comment field for an FYI assignment, do the following:

1. Click on the “Edit Comment” link next to an FYI assignment. This will open the “Edit Change Request Assignment” dialog.

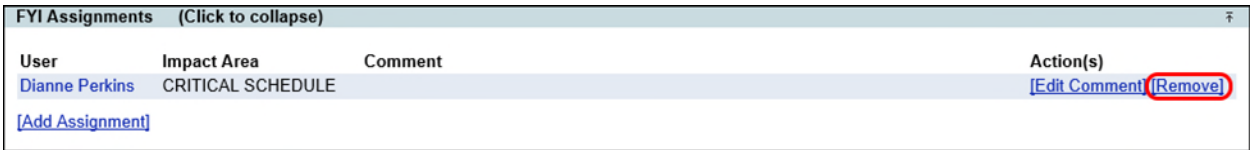


2. Enter a comment. Click “Save” to save the comment, or “Cancel” to cancel the operation.

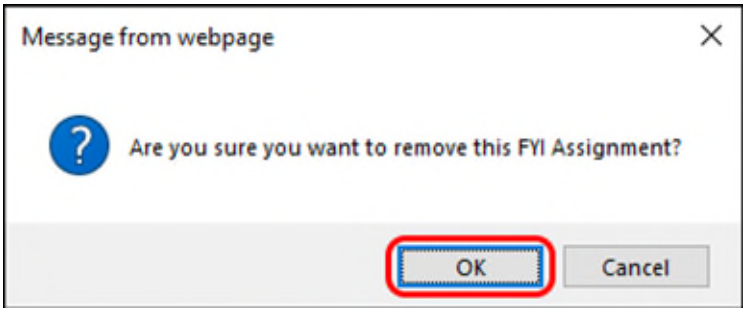
Removing an FYI Assignment

A Project Manager or a user with the proper "Manage Assignment" privilege may remove FYI assignments from a Change Request Package. To remove an FYI assignment from a Change Request Package, follow these steps:

1. Click on the "Remove" link to the right of the FYI assignment to be removed. A confirmation dialog will appear.

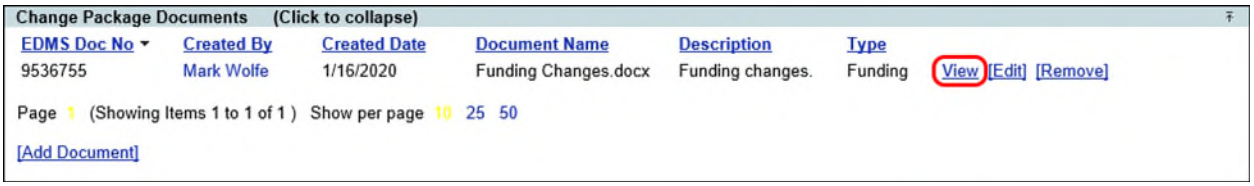


2. Confirm that you wish to remove the assignment. Click "OK" to remove the assignment, or "Cancel" to cancel the operation.



Change Package Documents

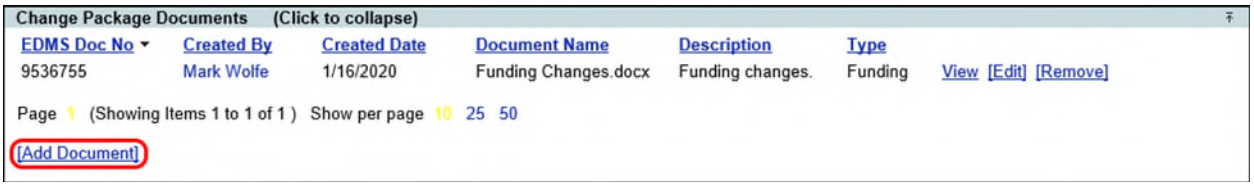
The Change Package documents panel displays the list of documents associated with the Change Request Package. Documents may be sorted by clicking on the linked headers. The black triangle indicates the direction of the sort: pointing up indicates ascending and pointing down indicates descending. A document may be downloaded and viewed at any time. To view a document, click on the "View" link for that document.



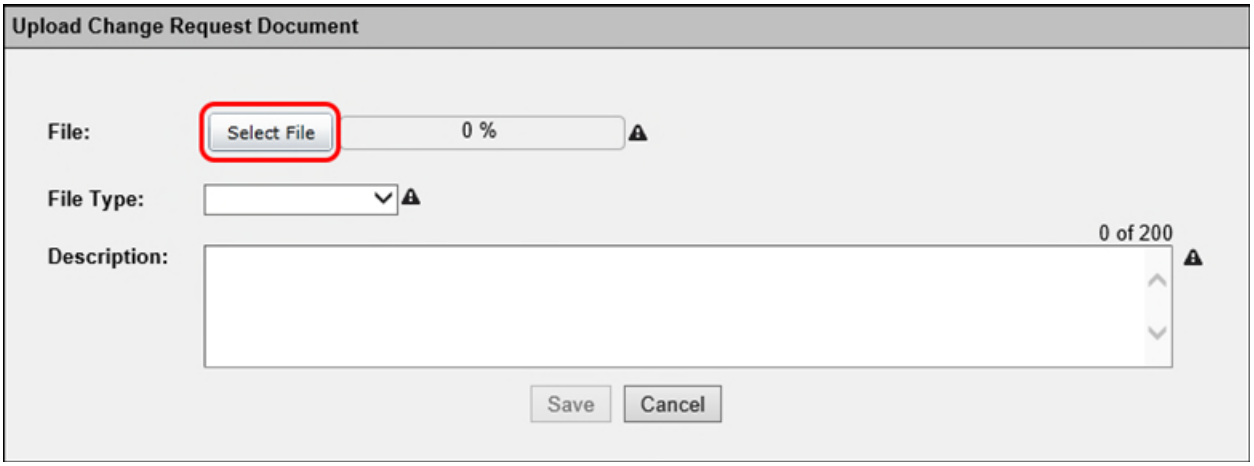
Adding a Document

You may add documents containing supporting details for the Change Request Package in the "Change Package Documents" Panel. To add a document to a Change Request Package, follow these steps:

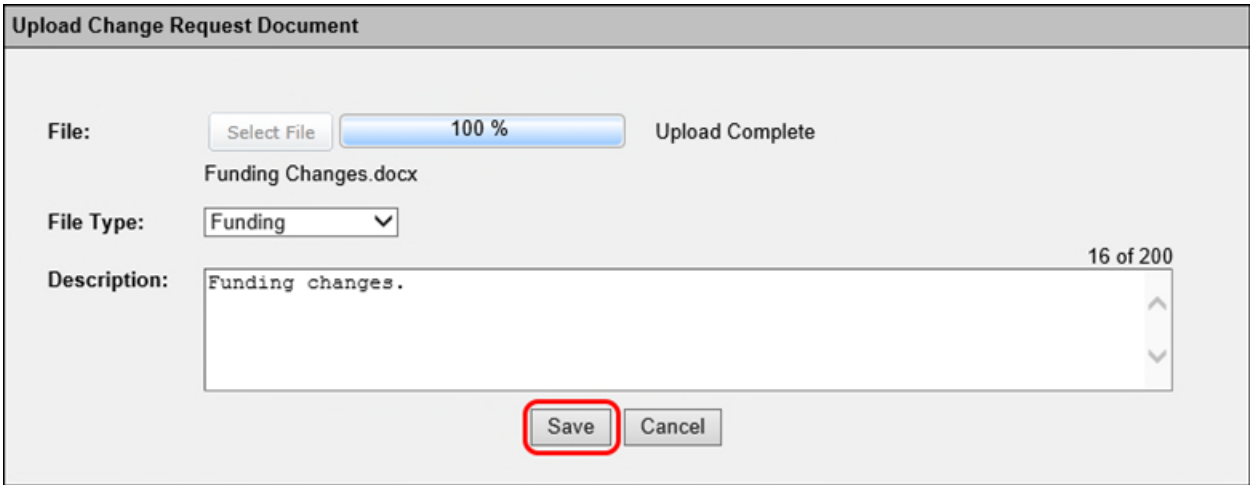
1. Click the "Add Document" link in the Change Package Documents panel. This will open the Upload Change Request Document dialog.



2. Click on the "Select File" button. This will display an "Open" dialog, from which you can select the document to be uploaded. This field is required.



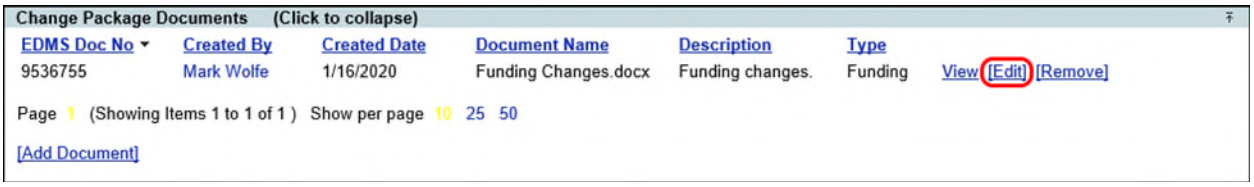
3. Select an associated Impact Area from the "File Type" dropdown list. This field is required.
4. Enter a description for the document. This field is required.
5. To upload the document, click "Save". To cancel this action, click "Cancel".



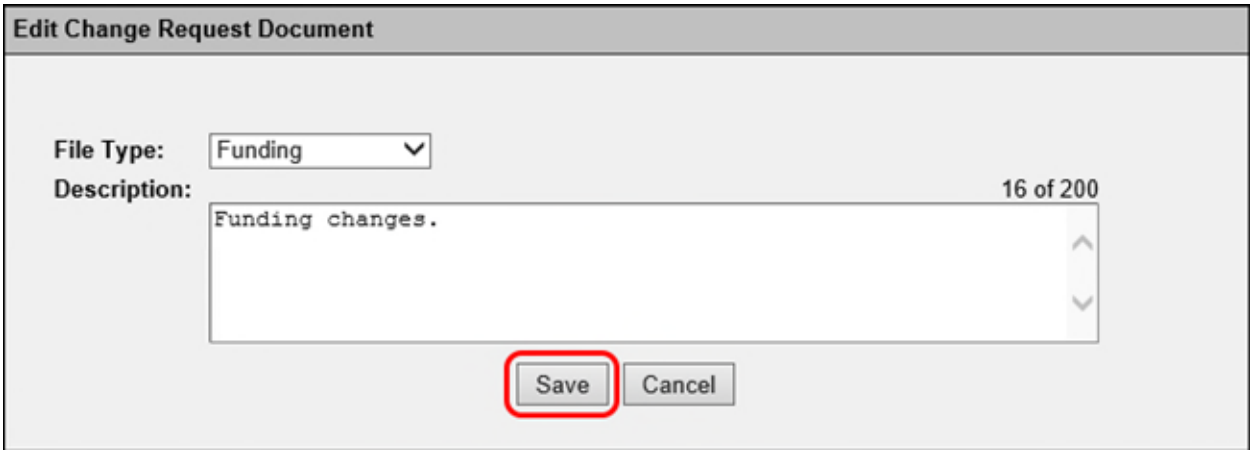
Editing a Document

To edit the details of a document, to the following:

1. Click the "Edit" link next to the desired document. This will open the "Edit Change Request Document" dialog.



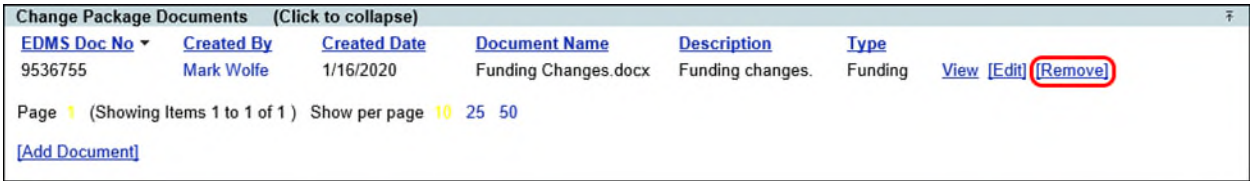
2. Update the File Type and Description. Click "Save" to save the changes, or "Cancel" to cancel this operation.



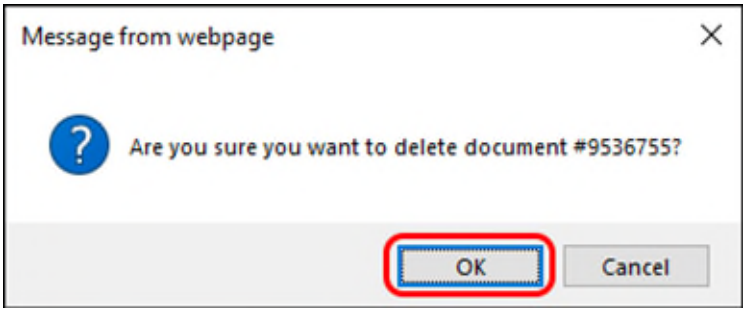
Removing a Document

If a document is no longer necessary, it can be removed from the Change Request Package. To remove a document, to the following:

1. Click "Remove" next to the document to be removed. This will display a confirmation dialog.



2. Click "OK" to delete the document, or "Cancel" to cancel this action.



Change Package Comments/History

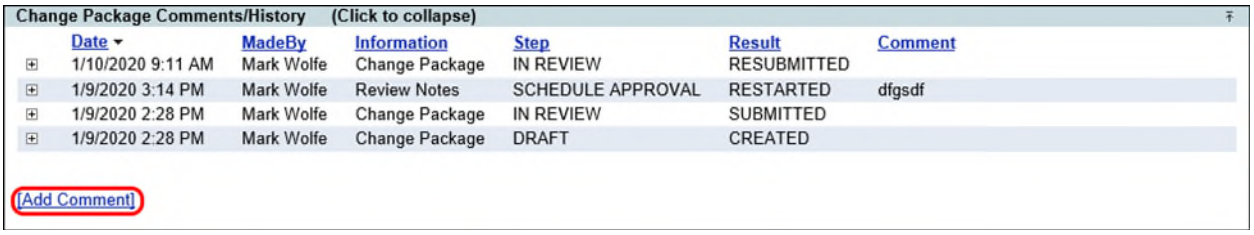
The "Change Package Comments/History" panel contains a list of all comments provided by authorized users during the processing of a Change Request Package. These comments are generated automatically

when an action is taken within the Change Request Package, i.e. Submit, Revise, etc., or they may be created manually by a user. Comments may be sorted by clicking on the linked headers.

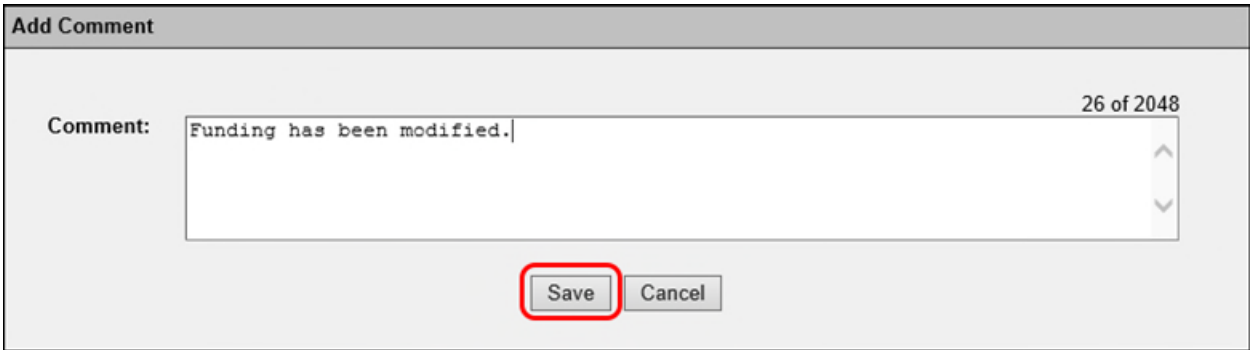
Adding a Comment

To manually add a comment to a Change Request Package, follow these steps:

1. Click the “Add Comment” link, which opens the “Add Comment” dialog.



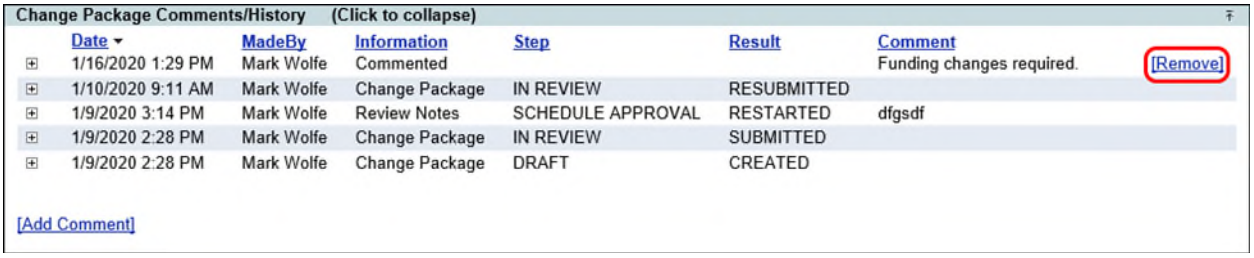
2. Add a comment and click “Save” to save the comment, or “Cancel” to cancel the operation.



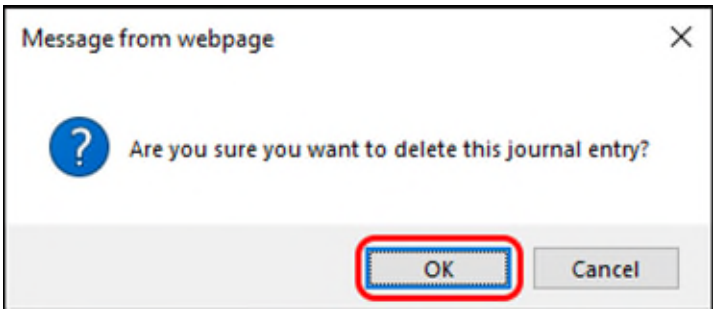
Removing a Comment

User generated comments may also be removed. To remove a comment, follow these steps:

1. Click the “Remove” link next to the comment you wish to remove. This will open a confirmation dialog.



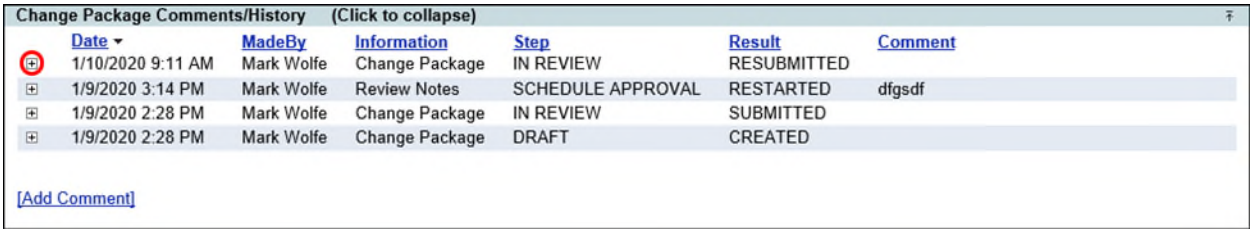
2. Confirm that you want to delete the comment by clicking “OK”. Otherwise, click “Cancel” to cancel the operation.



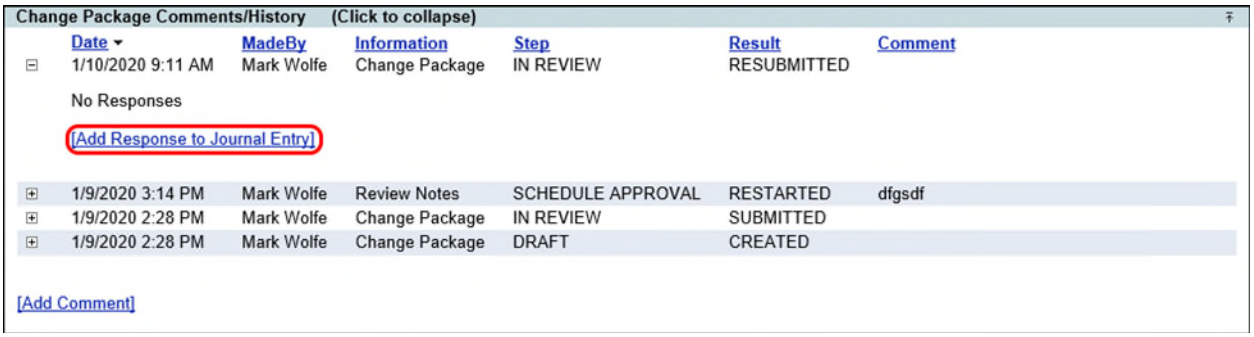
Adding a Response

Optionally, users may add responses to Change Request Package comments. To add a response to a comment, follow these steps.

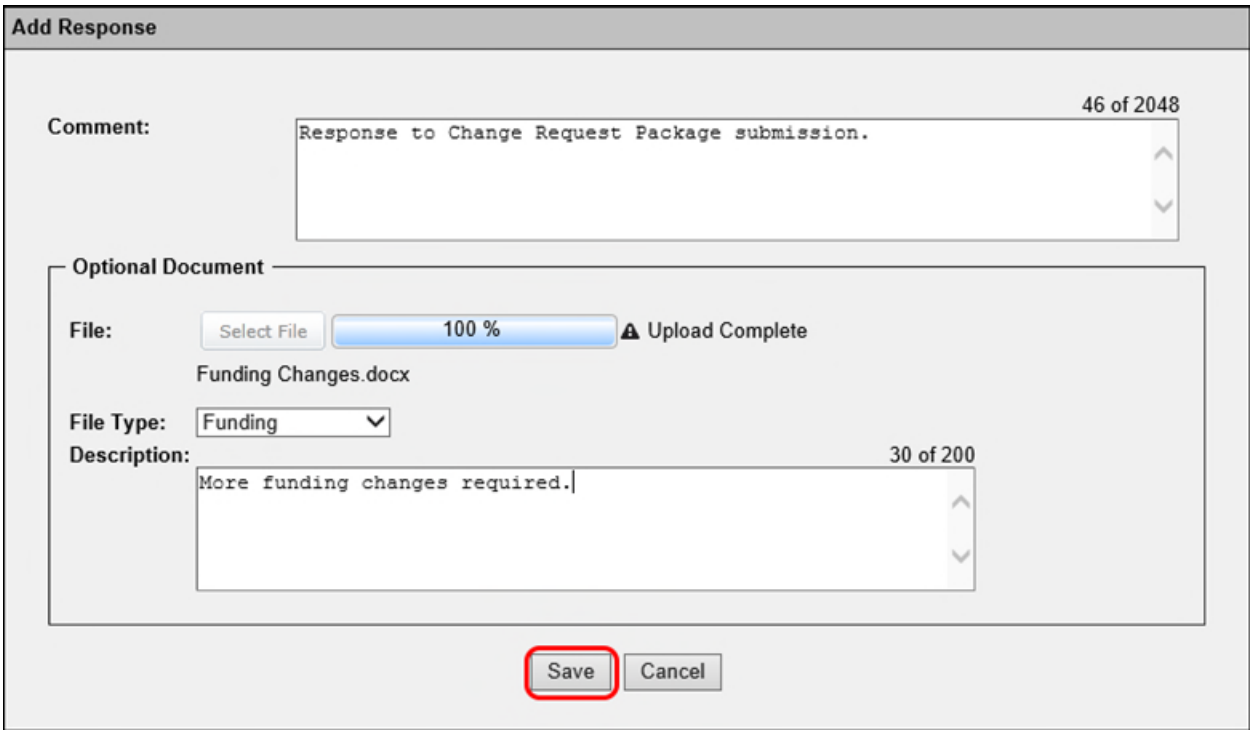
1. Click the plus icon next to a comment to expand the details view for the comment.



2. Click the “Add Response to Journal Entry” link to add a response. This will open the “Add Response” dialog.

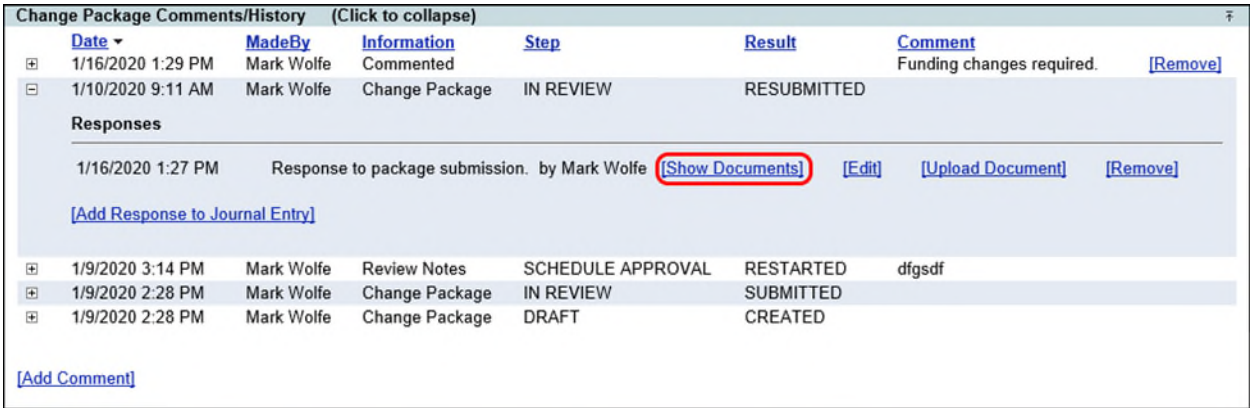


3. Enter a comment and, optionally, add a file to the response. Click “Save” to save the response, or “Cancel” to cancel the operation.



Viewing Response Documents

Responses to comments may include documents. To view or hide the documents associated with a response, click the "Show Documents" link to display the documents. Alternatively, click the "Hide Documents" link to hide the documents list.

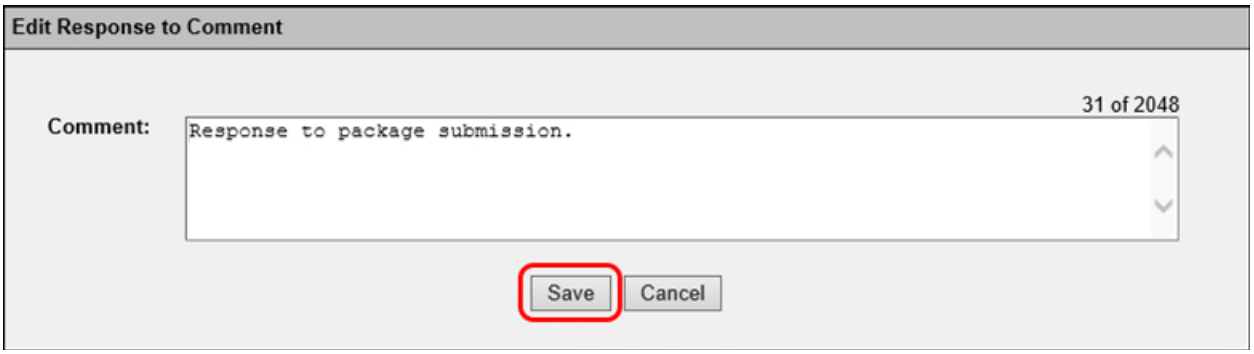


Editing a Response

To edit a response, do the following:

1. Click on the "Edit" link next to a response. This will open the "Edit Response to Comment" dialog.

2. Edit the comment and click “Save” to save the changes. Click “Cancel” to cancel the operation.

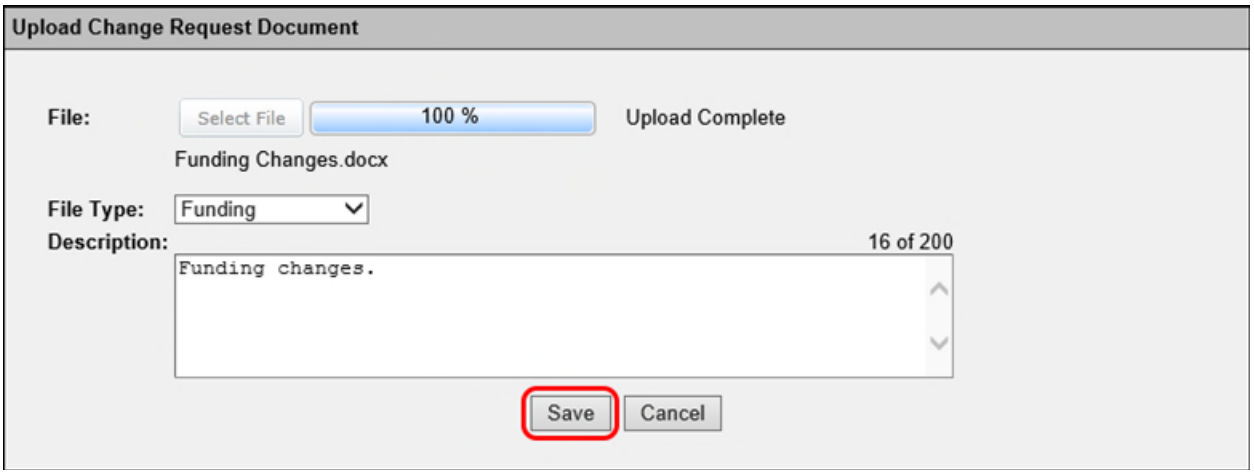


Adding Documents to a Response

To add additional documents to a response, do the following:

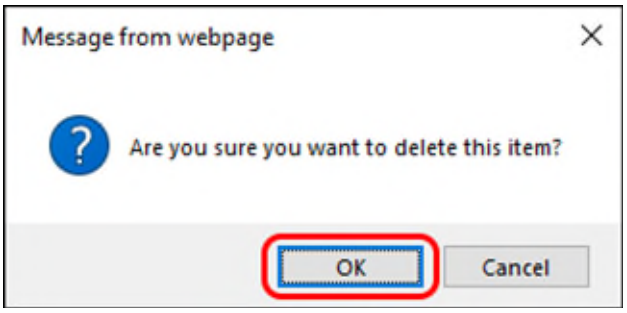
1. Click the “Upload Document” link next to the response you wish to add a document to. This will open the “Upload Change Request Document” dialog.

2. Select a file, choose an Impact Area from the File Type dropdown list, and enter a description. Click “Save” to upload the document, or “Cancel” to cancel the operation.



Removing a Response.

To remove a response to a Change Request Package Comment, follow these steps:

1. Click the "Remove" link next to the response you wish to remove. This will open a confirmation dialog.

2. Confirm that you wish to remove the response. Click "OK"vto remove the response, or "Cancel" to cancel the operation.