

# PSEE Change Management Module

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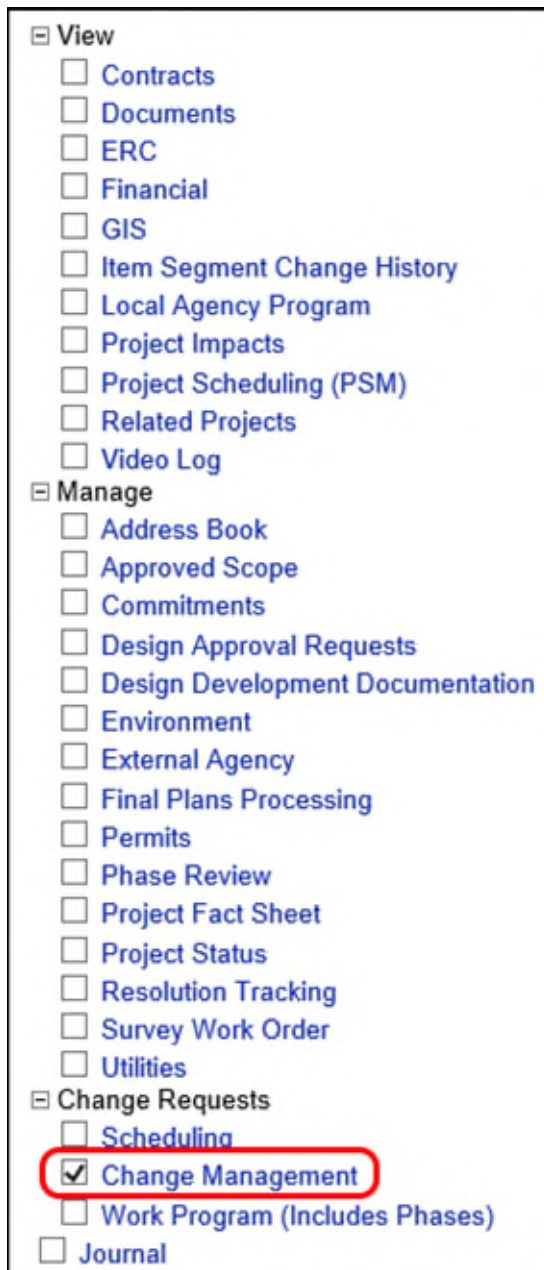
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## Change Management Module

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.



The screenshot shows a list of modules organized into four categories: View, Manage, Change Requests, and Journal. Each item has a checkbox to its left. The 'Change Management' checkbox under the 'Change Requests' category is checked and circled in red.

- View
  - Contracts
  - Documents
  - ERC
  - Financial
  - GIS
  - Item Segment Change History
  - Local Agency Program
  - Project Impacts
  - Project Scheduling (PSM)
  - Related Projects
  - Video Log
- Manage
  - Address Book
  - Approved Scope
  - Commitments
  - Design Approval Requests
  - Design Development Documentation
  - Environment
  - External Agency
  - Final Plans Processing
  - Permits
  - Phase Review
  - Project Fact Sheet
  - Project Status
  - Resolution Tracking
  - Survey Work Order
  - Utilities
- Change Requests
  - Scheduling
  - Change Management
  - Work Program (Includes Phases)
- Journal

### 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	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Manage Project Info Assignment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Complete Project Info	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Manage Scope Summary	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Manage Scope Summary Assignment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Manage Critical Schedule Assignment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Complete Critical Schedule	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Manage Funding	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Manage Funding Assignment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Complete Funding	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Manage Critical Schedule	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Manage Package	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="button" value="Request"/> <input type="button" value="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.

**Change Management** (Click to collapse)

Impact Area Filter:   Show Funding Phase(s) Funding Phases:

<a href="#">View</a>	<a href="#">Date Created</a>	<a href="#">Impact Area(s)</a>	<a href="#">Funding Phase(s)</a>	<a href="#">Status</a>	<a href="#">Created By</a>	<a href="#">Reviewer</a>	<a href="#">Description</a>	<a href="#">Print</a>
<a href="#">View</a>	11/19/2019	Scope Summary, Funding, Critical Schedule, Project Info		Completed	Dianne Perkins		This is a test of Phase 4 deliverable.	<a href="#">Print</a>
<a href="#">View</a>	1/9/2020	Critical Schedule, Project Info		In Review	Mark Wolfe	Ana Gonzalez	Schedule Change	<a href="#">Print</a>

[Add New 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.

**Overview Information** (Click to collapse)

Request Description:  30 of 2000

Requested By:  [\[Show all users\]](#) Status: New

Created Date: 1/16/2020 Submitted Date:

Select	Impact	Reason	Status	Completed By	Completed Date	Key System Update
<input type="checkbox"/>	Scope Summary					N/A
<input type="checkbox"/>	Funding					
<input type="checkbox"/>	Critical Schedule					
<input type="checkbox"/>	Project Info					

[Include Document](#)

[Save](#) [Cancel](#)

## Removing a Change Request Package

To remove a Change Request Package, follow these steps:

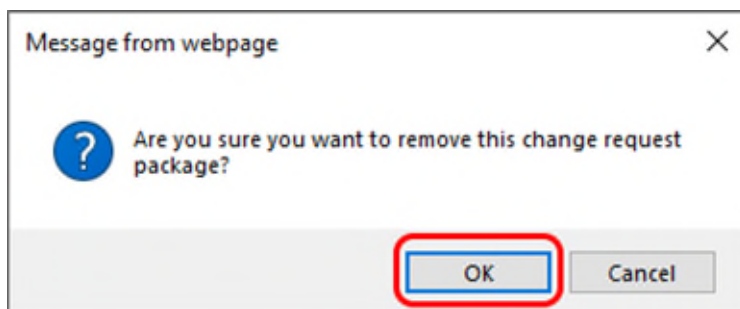
1. Click on the "Remove" link next to the Change Request Package that you wish to remove. This will open a confirmation dialog

Change Management (Click to collapse)

Impact Area Filter:   Show Funding Phase(s) Funding Phases:

	<a href="#">Date Created</a>	<a href="#">Impact Area(s)</a>	<a href="#">Funding Phase(s)</a>	<a href="#">Status</a>	<a href="#">Created By</a>	<a href="#">Reviewer</a>	<a href="#">Description</a>	
<a href="#">View</a>	11/19/2019	Scope Summary, Funding, Critical Schedule, Project Info		Completed	Dianne Perkins		This is a test of Phase 4 deliverable.	<a href="#">Print</a>
<a href="#">View</a>	1/9/2020	Critical Schedule, Project Info		In Review	Mark Wolfe	Ana Gonzalez	Schedule Change	<a href="#">Print</a>
<a href="#">View</a>	1/13/2020			Draft	Mark Wolfe		This project requires changes.	<a href="#">Print</a> <a href="#">Remove</a>

- 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.

Change Management (Click to collapse)

Impact Area Filter:   Show Funding Phase(s) Funding Phases:

	<a href="#">Date Created</a>	<a href="#">Impact Area(s)</a>	<a href="#">Funding Phase(s)</a>	<a href="#">Status</a>	<a href="#">Created By</a>	<a href="#">Reviewer</a>	<a href="#">Description</a>	
<a href="#">View</a>	11/19/2019	Scope Summary, Funding, Critical Schedule, Project Info		Completed	Dianne Perkins		This is a test of Phase 4 deliverable.	<a href="#">Print</a>
<a href="#">View</a>	1/9/2020	Critical Schedule, Project Info		In Review	Mark Wolfe	Ana Gonzalez	Schedule Change	<a href="#">Print</a>
<a href="#">View</a>	1/13/2020			Draft	Mark Wolfe		Changes are required for this project.	<a href="#">Print</a> <a href="#">Remove</a>

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.

**Change Management** (Click to collapse)

[Return to Change Management List](#)

**Overview Information** (Click to collapse)

No Change Required

Request Description: Changes are required for this project. 38 of 2000

Requested By: Mark Wolfe [Show all users] Status: Draft  
 Created Date: 1/13/2020 Submitted Date:

Select	Impact	Reason	Status	Completed By	Completed Date	Key System Update
<input type="checkbox"/>	Scope Summary					N/A
<input type="checkbox"/>	Funding					
<input type="checkbox"/>	Critical Schedule					
<input type="checkbox"/>	Project Info					

Submit Change Request Package Save Cancel

**Impact Area Information** (Click to collapse)  
No impact areas have been added.

**Reviewer Assignments** (Click to collapse)  
No reviewer assignments have been added.

**FYI Assignments** (Click to collapse)  
No FYI assignments have been added.

**Change Package Documents** (Click to collapse)  
No Documents Found  
[Add Document](#)

**Change Package Comments/History** (Click to collapse)

Date	MadeBy	Information	Step	Result	Comment
1/13/2020 4:03 PM	Mark Wolfe	Change Package	DRAFT	CREATED	

[Add Comment](#)

**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.

Change Management (Click to collapse)

Impact Area Filter: All  Show Funding Phase(s) Funding Phases: All

	Date Created	Impact Area(s)	Funding Phase(s)	Status	Created By	Reviewer	Description	
<a href="#">View</a>	11/19/2019	Scope Summary, Funding, Critical Schedule, Project Info		Completed	Dianne Perkins		This is a test of Phase 4 deliverable.	<a href="#">Print</a>
<a href="#">View</a>	1/9/2020	Critical Schedule, Project Info		In Review	Mark Wolfe	Ana Gonzalez	Schedule Change	<a href="#">Print</a>
<a href="#">View</a>	1/13/2020			Draft	Mark Wolfe		Changes are required for this project.	<a href="#">Print</a> <a href="#">[Remove]</a>

Add New Change Request Package

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.

Overview Information (Click to collapse)

No Change Required

Request Description:  38 of 2000

Requested By:  [\[Show all users\]](#) Status: Draft

Created Date: 1/13/2020 Submitted Date:

Select	Impact	Reason	Status	Completed By	Completed Date	Key System Update
<input type="checkbox"/>	Scope Summary					N/A
<input type="checkbox"/>	Funding					
<input type="checkbox"/>	Critical Schedule					
<input type="checkbox"/>	Project Info					

Submit Change Request Package [Save](#) [Cancel](#)

**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”.

Overview Information (Click to collapse)						
No Change Required <input type="checkbox"/>						
Request Description: This project requires changes.						30 of 2000
Requested By: Mark Wolfe		<a href="#">[Show all users]</a>		Status: Draft		
Created Date: 1/16/2020				Submitted Date:		
Select	Impact	Reason	Status	Completed By	Completed Date	Key System Update
<input checked="" type="checkbox"/>	Scope Summary	Delays	Draft			N/A
<input type="checkbox"/>	Funding					
<input type="checkbox"/>	Critical Schedule					
<input type="checkbox"/>	Project Info					
Submit Change Request Package						Save Cancel

**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.

Overview Information (Click to collapse)						
Request Description: This project requires changes.						30 of 2000
Requested By: Mark Wolfe		<a href="#">[Show all users]</a>		Status: In Review		
Created Date: 1/16/2020				Submitted Date: 1/17/2020		
Select	Impact	Reason	Status	Completed By	Completed Date	Key System Update
<input checked="" type="checkbox"/>	Scope Summary	Delays	In Review			N/A
<input type="checkbox"/>	Funding					
<input type="checkbox"/>	Critical Schedule					
<input type="checkbox"/>	Project Info					
Revise for Resubmission (Status = Revision)						Hold (Status = On Hold) Withdraw (Status = Withdrawn)

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

**Revise for Resubmission Confirmation**

Resume with Current Review on Resubmission (Restricted to District Administrators)

Revise for Resubmission Comment: 17 of 400

Changes required.

**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.

**Overview Information** (Click to collapse) 30 of 2000

Request Description: 30 of 2000

This project requires changes.

Requested By:  [\[Show all users\]](#)    Status: In Review

Created Date: 1/16/2020    Submitted Date: 1/17/2020

Select	Impact	Reason	Status	Completed By	Completed Date	Key System Update
<input checked="" type="checkbox"/>	Scope Summary	Delays	In Review			N/A
<input type="checkbox"/>	Funding					
<input type="checkbox"/>	Critical Schedule					
<input type="checkbox"/>	Project Info					

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.

### Hold Confirmation

16 of 400

**Hold Comment:**

**Reminder Date:**

**Release Date:**

**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.

Overview Information (Click to collapse) 30 of 2000

**Request Description:**

**Requested By:**  [\[Show all users\]](#)    **Status:** In Review

**Created Date:** 1/16/2020    **Submitted Date:** 1/17/2020

Select	Impact	Reason	Status	Completed By	Completed Date	Key System Update
<input checked="" type="checkbox"/>	Scope Summary	Delays	In Review			N/A
<input type="checkbox"/>	Funding					
<input type="checkbox"/>	Critical Schedule					
<input type="checkbox"/>	Project Info					

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

### Withdraw Change Request

Withdraw Comment: 32 of 400

Withdraw change request package.

Continue
Cancel

**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”.

**Overview Information** (Click to collapse)

No Change Required

Request Description: 30 of 2000

This project requires changes.

Requested By:  [\[Show all users\]](#)    Status: Revision

Created Date: 1/16/2020    Submitted Date: 1/17/2020

Select	Impact	Reason	Status	Completed By	Completed Date	Key System Update
<input checked="" type="checkbox"/>	Scope Summary	Delays	Revision			N/A
<input type="checkbox"/>	Funding					
<input type="checkbox"/>	Critical Schedule					
<input type="checkbox"/>	Project Info					

Resubmit
Save
Cancel

**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.

**Overview Information** (Click to collapse) 30 of 2000

**Request Description:**

**Requested By:**  [\[Show all users\]](#) **Status:** Pending Clarification

**Created Date:** 1/16/2020 **Submitted Date:** 1/17/2020

Select	Impact	Reason	Status	Completed By	Completed Date	Key System Update
<input checked="" type="checkbox"/>	Scope Summary	Delays	In Review			N/A
<input type="checkbox"/>	Funding					
<input type="checkbox"/>	Critical Schedule					
<input type="checkbox"/>	Project Info					

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.

**Provide Clarification**

**Clarification Request:** Please clarify.

**Clarification Comment:** 23 of 400

**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".

Overview Information (Click to collapse)						
Request Description: This project requires changes.						30 of 2000
Requested By: Mark Wolfe		[Show all users]	Status: Pending Clarification			
Created Date: 1/16/2020		Submitted Date: 1/17/2020				
Select	Impact	Reason	Status	Completed By	Completed Date	Key System Update
<input checked="" type="checkbox"/>	Scope Summary	Delays	In Review			N/A
<input type="checkbox"/>	Funding					
<input type="checkbox"/>	Critical Schedule					
<input type="checkbox"/>	Project Info					
<input type="button" value="Provide Clarification"/> <input checked="" type="button" value="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”.

Overview Information (Click to collapse)						
Request Description: This project requires changes.						30 of 2000
Requested By: Mark Wolfe		[Show all users]	Status: On Hold			
Created Date: 1/17/2020		Submitted Date: 1/17/2020				
Select	Impact	Reason	Status	Completed By	Completed Date	Key System Update
<input checked="" type="checkbox"/>	Scope Summary	Delays	On Hold			N/A
<input type="checkbox"/>	Funding					
<input type="checkbox"/>	Critical Schedule					
<input type="checkbox"/>	Project Info					
<input checked="" type="button" value="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.

**Impact Area Information** (Click to collapse) Display Value:  Current  Original

**Scope Summary** Funding Critical Schedule Project Info

Workflow Information

Workflow Steps

Workflow Steps: Tim Folsom Renee Calo

Reason: Change/Revision Scope Of Work ?

Impact Description: 62 of 2000  
 We need to add some lighting and drainage to this project, xxx

Current Scope Summary New Scope Summary Changed

Scope Elements

<input type="checkbox"/> Access Management	<input type="checkbox"/> ADA	<input type="checkbox"/> Architectural
<input type="checkbox"/> Context Sensitive Solutions	<input checked="" type="checkbox"/> Drainage	<input type="checkbox"/> Environment
<input type="checkbox"/> ITS	<input type="checkbox"/> Landscaping/Hardscape	<input checked="" type="checkbox"/> Lighting
<input type="checkbox"/> Miscellaneous	<input type="checkbox"/> Railroad	<input type="checkbox"/> Roadway
<input type="checkbox"/> School Zone	<input type="checkbox"/> Sidewalks	<input type="checkbox"/> Signalization
<input type="checkbox"/> Signing and Marking	<input type="checkbox"/> Structures	<input type="checkbox"/> Tolls
<input type="checkbox"/> Transit/Modal	<input type="checkbox"/> Turn Lanes	<input type="checkbox"/> Typical Section
<input type="checkbox"/> Utilities	<input type="checkbox"/> Walls (Soundwalls)	
<input type="checkbox"/> Walls (Structures, Retaining, Barrier)		

Drainage

<b>Current</b>	<b>Proposed</b>	<b>New</b>
** New	This is new scope for drainage. Construct drainage swells 5' beyond new sidewalk. Add covered grate to middle of walkway.	

Lighting

<b>Current</b>	<b>Proposed</b>	<b>New</b>
** New	This is new scope for lighting. Install high mast, single arm lighting	

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.



**Impact Area Information** (Click to collapse) Display Value  Current  Original

Scope Summary **Funding** Critical Schedule Project Info

Workflow Information

Workflow Steps

Workflow Steps: Tim Folsom Renee Calo

Reason: Change/Revision Scope Of Work ?

Impact Description: 62 of 2000  
We need to add some lighting and drainage to this project, xxx

Current Scope Summary New Scope Summary Changed

Scope Elements

<input type="checkbox"/> Access Management	<input type="checkbox"/> ADA	<input type="checkbox"/> Architectural
<input type="checkbox"/> Context Sensitive Solutions	<input checked="" type="checkbox"/> Drainage	<input type="checkbox"/> Environment
<input type="checkbox"/> ITS	<input type="checkbox"/> Landscaping/Hardscape	<input checked="" type="checkbox"/> Lighting
<input type="checkbox"/> Miscellaneous	<input type="checkbox"/> Railroad	<input type="checkbox"/> Roadway
<input type="checkbox"/> School Zone	<input type="checkbox"/> Sidewalks	<input type="checkbox"/> Signalization
<input type="checkbox"/> Signing and Marking	<input type="checkbox"/> Structures	<input type="checkbox"/> Tolls
<input type="checkbox"/> Transit/Modal	<input type="checkbox"/> Turn Lanes	<input type="checkbox"/> Typical Section
<input type="checkbox"/> Utilities	<input type="checkbox"/> Walls (Soundwalls)	
<input type="checkbox"/> Walls (Structures, Retaining, Barrier)		

Drainage

<b>Current</b>	<b>Proposed</b>	<b>New</b>
** New	This is new scope for drainage. Construct drainage swells 5' beyond new sidewalk. Add covered grate to middle of walkway.	

Lighting

<b>Current</b>	<b>Proposed</b>	<b>New</b>
** New	This is new scope for lighting. Install high mast, single arm lighting	

## 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.

Overview Information (Click to collapse)						
No Change Required <input type="checkbox"/>						
Request Description: This project requires changes.						30 of 2000
Requested By: Mark Wolfe		<a href="#">[Show all users]</a>		Status: Draft		
Created Date: 1/16/2020				Submitted Date: 1/17/2020		
Select	Impact	Reason	Status	Completed By	Completed Date	Key System Update
<input checked="" type="checkbox"/>	Scope Summary	Amendment	New			N/A
<input type="checkbox"/>	Funding					
<input type="checkbox"/>	Critical Schedule					
<input type="checkbox"/>	Project Info					
Submit Change Request Package						Save Cancel

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.

**Impact Area Information** (Click to collapse) Display Value:  Current  Original

**Scope Summary**

**Workflow Information**

**Workflow(s):** Scope Change CPM

**Workflow Steps**

**Workflow Steps:** None assigned

**Reason:** Change/Revision Scope Of Work ?

**Impact Description:** 59 of 2000

We need to add some lighting and drainage for this project.

**Current Scope Summary** New Scope Summary Changed

This is new scope for lighting. Install high west, single area lighting.

**Scope Elements**

<input type="checkbox"/> Access Management	<input type="checkbox"/> ADA	<input type="checkbox"/> Architectural
<input type="checkbox"/> Context Sensitive Solutions	<input type="checkbox"/> Drainage	<input type="checkbox"/> Environment
<input type="checkbox"/> ITS	<input type="checkbox"/> Landscaping/Hardscape	<input type="checkbox"/> Lighting
<input type="checkbox"/> Miscellaneous	<input type="checkbox"/> Railroad	<input type="checkbox"/> Roadway
<input type="checkbox"/> School Zone	<input type="checkbox"/> Sidewalks	<input type="checkbox"/> Signalization
<input type="checkbox"/> Signing and Marking	<input type="checkbox"/> Structures	<input type="checkbox"/> Tolls
<input type="checkbox"/> Transit/Modal	<input type="checkbox"/> Turn Lanes	<input type="checkbox"/> Typical Section
<input type="checkbox"/> Utilities	<input type="checkbox"/> Walls (Soundwalls)	
<input type="checkbox"/> Walls (Structures, Retaining, Barrier)		

Save Cancel

## 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.

**Impact Area Information** (Click to collapse) Display Value:  Current  Original

**Scope Summary**

Workflow Information

Workflow(s):

Workflow Steps

Workflow Steps: None assigned

Reason:  ?

**Impact Description:** 59 of 2000

We need to add some lighting and drainage for this project.

**Current Scope Summary** New Scope Summary Changed

**Scope Elements**

<input type="checkbox"/> Access Management	<input type="checkbox"/> ADA	<input type="checkbox"/> Architectural
<input type="checkbox"/> Context Sensitive Solutions	<input type="checkbox"/> Drainage	<input type="checkbox"/> Environment
<input type="checkbox"/> ITS	<input type="checkbox"/> Landscaping/Hardscape	<input checked="" type="checkbox"/> <b>Lighting</b>
<input type="checkbox"/> Miscellaneous	<input type="checkbox"/> Railroad	<input type="checkbox"/> Roadway
<input type="checkbox"/> School Zone	<input type="checkbox"/> Sidewalks	<input type="checkbox"/> Signalization
<input type="checkbox"/> Signing and Marking	<input type="checkbox"/> Structures	<input type="checkbox"/> Tolls
<input type="checkbox"/> Transit/Modal	<input type="checkbox"/> Turn Lanes	<input type="checkbox"/> Typical Section
<input type="checkbox"/> Utilities	<input type="checkbox"/> Walls (Soundwalls)	
<input type="checkbox"/> Walls (Structures, Retaining, Barrier)		

**Lighting**

<b>Current</b>	<b>Proposed</b>	<b>New</b>
<input type="text" value="** New"/>	<input type="text" value="Additional lighting required."/>	<input type="text" value=""/>

### 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.

**Impact Area Information** (Click to collapse) Display Value:  Current  Original

**Scope Summary**

Workflow Information

Workflow(s):

Workflow Steps

Workflow Steps: None assigned

Reason:  ?

**Impact Description:** 59 of 2000

We need to add some lighting and drainage for this project.

**Current Scope Summary** New Scope Summary Changed

**Scope Elements**

<input type="checkbox"/> Access Management	<input type="checkbox"/> ADA	<input type="checkbox"/> Architectural
<input type="checkbox"/> Context Sensitive Solutions	<input checked="" type="checkbox"/> <b>Drainage</b>	<input type="checkbox"/> Environment
<input type="checkbox"/> ITS	<input type="checkbox"/> Landscaping/Hardscape	<input type="checkbox"/> Lighting
<input type="checkbox"/> Miscellaneous	<input type="checkbox"/> Railroad	<input type="checkbox"/> Roadway
<input type="checkbox"/> School Zone	<input type="checkbox"/> Sidewalks	<input type="checkbox"/> Signalization
<input type="checkbox"/> Signing and Marking	<input type="checkbox"/> Structures	<input type="checkbox"/> Tolls
<input type="checkbox"/> Transit/Modal	<input type="checkbox"/> Turn Lanes	<input type="checkbox"/> Typical Section
<input type="checkbox"/> Utilities	<input type="checkbox"/> Walls (Soundwalls)	
<input type="checkbox"/> Walls (Structures, Retaining, Barrier)		

**Drainage**

<b>Current</b>	<b>Proposed</b>	<b>Removed</b>
<input type="text" value="provide open drainage system with swales for rural sections"/>	<input type="text" value="** Mark as Removed"/>	<input type="text" value=""/>

## 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.

Impact Area Information (Click to collapse)
Display Value:  Current  Original

Scope Summary

Workflow Information

**Workflow(s):** Scope Change CPM

Workflow Steps

**Workflow Steps:** None assigned

**Reason** Change/Revision Scope Of Work ?

**Impact Description:** 59 of 2000

We need to add some lighting and drainage for this project.

**Current Scope Summary**

**New Scope Summary** Changed

This is new scope for lighting. Install high west, single area lighting.

Scope Elements

<input type="checkbox"/> Access Management	<input type="checkbox"/> ADA	<input type="checkbox"/> Architectural
<input type="checkbox"/> Context Sensitive Solutions	<input type="checkbox"/> Drainage	<input type="checkbox"/> Environment
<input type="checkbox"/> ITS	<input type="checkbox"/> Landscaping/Hardscape	<input type="checkbox"/> Lighting
<input type="checkbox"/> Miscellaneous	<input type="checkbox"/> Railroad	<input type="checkbox"/> Roadway
<input type="checkbox"/> School Zone	<input type="checkbox"/> Sidewalks	<input type="checkbox"/> Signalization
<input type="checkbox"/> Signing and Marking	<input type="checkbox"/> Structures	<input type="checkbox"/> Tolls
<input type="checkbox"/> Transit/Modal	<input type="checkbox"/> Turn Lanes	<input checked="" type="checkbox"/> Typical Section
<input type="checkbox"/> Utilities	<input type="checkbox"/> Walls (Soundwalls)	
<input type="checkbox"/> Walls (Structures, Retaining, Barrier)		

Typical Section

<p><b>Current</b></p> <div style="border: 1px solid #ccc; padding: 2px; background-color: #f0f0f0;">           The following typical section changes are proposed:A four-lane rural typical section (64-ft median width) with 12-ft shared use path between         </div>	<p><b>Proposed</b> <span style="float: right;">No Change</span></p> <div style="border: 2px solid red; padding: 2px; background-color: #f0f0f0;">           The following typical section changes are proposed:A four-lane rural typical section (64-ft median width) with 12-ft shared use path between         </div>
--	---

Save Cancel

## 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.

**Overview Information** (Click to collapse) f

No Change Required

Request Description:  30 of 2000

Requested By:  [\[Show all users\]](#) Status: Draft  
 Created Date: 1/16/2020 Submitted Date: 1/17/2020

Select	Impact	Reason	Status	Completed By	Completed Date	Key System Update
<input checked="" type="checkbox"/>	Scope Summary	Scope	Draft			N/A
<input checked="" type="checkbox"/>	Funding	Scope	Draft			
<input type="checkbox"/>	Critical Schedule					
<input type="checkbox"/>	Project Info					

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.

**Impact Area Information** (Click to collapse) f

Scope Summary **Funding** Display Value:  Current  Original

Workflow Information

Estimate Workflow(s):

Estimate Workflow Steps

Front Review  Back Review  
 Front/Back Steps: None Assigned  
 Workflow Steps: None assigned

Funding Workflow:

Workflow Steps

Funding Workflow Steps: None assigned

Reason:  ?

Impact Description:  21 of 2000

New Funding Request(s)

No funding requests currently exist.  
[\[Add New Funding Request\]](#)

## 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.

Impact Area Information (Click to collapse) Display Value:  Current  Original

Scope Summary Funding

Workflow Information

Estimate Workflow(s): Estimate Front

Estimate Workflow Steps

Front Review  Back Review

Front/Back Steps: None Assigned

Workflow Steps: None assigned

Funding Workflow: Work Program

Workflow Steps

Funding Workflow Steps: None assigned

Reason: Change/Revision Scope Of Work

Impact Description: 21 of 2000  
New funding required.

New Funding Request(s)

No funding requests currently exist.

[\(Add New Funding Request\)](#)

Save Cancel

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



**Propose New Funding**

Action: Annual Update ▼

Version:

Phase: 5 ▼ 2 ▼

Sequence:

Fiscal Year:

Fund: D2OH - PTO SURFACE PRIMARY OVERHEAD ▼

Fund Source: State ▼

PGM: 11 - INTERMODAL ACCESS ▼

19 of 250

Description:

Moving In/Out of box:

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.

**Propose New Funding**

Action: Annual Update ▼

Version: 123

Phase: 5 ▼ 2 ▼

Sequence:

Fiscal Year:

Fund: D2OH - PTO SURFACE PRIMARY OVERHEAD ▼

Fund Source: State ▼

PGM: 11 - INTERMODAL ACCESS ▼

19 of 250

Description:

Moving In/Out of box:

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

**Propose New Funding**

Action: Annual Update ▾

Version: 123

Phase: 5 ▾ 2 ▾

Sequence: 1

Fiscal Year: 2020

Fund: D20H - PTO SURFACE PRIMARY OVERHEAD ▾

Fund Source: State ▾

PGM: 11 - INTERMODAL ACCESS ▾

19 of 250

Description: New funding request

Moving In/Out of box:

Save Cancel

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

**Propose New Funding**

Action: Annual Update ▾

Version: 123

Phase: 5 ▾ 2 ▾

Sequence: 1

Fiscal Year: 2020

Fund: D20H - PTO SURFACE PRIMARY OVERHEAD ▾

Fund Source: State ▾

PGM: 11 - INTERMODAL ACCESS ▾

19 of 250

Description: New funding request

Moving In/Out of box:

Save Cancel

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

**Propose New Funding**

Action:

Phase:

Sequence:

Fiscal Year:

Fiscal Year To:

Fund:

Fund Source:

PGM:

19 of 250

Description:

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.

**Propose New Funding**

Action:

Phase:

Sequence:

Fiscal Year:

Fiscal Year To:

Fund:

Fund Source:

PGM:

19 of 250

Description:

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.

**Propose New Funding**

Action: Add ▾

Phase: 5 ▾ 2 ▾

Sequence: 1

Fiscal Year: 2020

PDC Amount: 10,000

Fund: D20H - PTO SURFACE PRIMARY OVERHEAD ▾

Fund Source: State ▾

PGM: 11 - INTERMODAL ACCESS ▾

19 of 250

Description: New funding request

Moving In/Out of box:

Save Cancel

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

**Propose New Funding**

Action: Defer ▾

Phase: 5 ▾ 2 ▾

Sequence: 1

Fiscal Year: 2020

Fiscal Year To: 2021

Fund: D20H - PTO SURFACE PRIMARY OVERHEAD ▾

Fund Source: State ▾

PGM: 11 - INTERMODAL ACCESS ▾

19 of 250

Description: New funding request

Save Cancel

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

**Propose New Funding**

Action:

Phase:

Sequence:

Fiscal Year:

Fiscal Year To:

Fund:

Fund Source:

PGM:

19 of 250

Description:

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

**Propose New Funding**

Action:

Phase:

Sequence:

Fiscal Year:

Fiscal Year To:

Fund:

Fund Source:

PGM:

19 of 250

Description:

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

**Propose New Funding**

Action:

Phase:

Sequence:

Fiscal Year:

Fiscal Year To:

Fund:

Fund Source:

PGM:

Description:  19 of 250

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”.

**Propose New Funding**

Action:

Phase:

Sequence:

Fiscal Year:

Fund:

Fund Source:

PGM:

Description:  19 of 250

Moving In/Out of box:

Box #:  -  -  -

Box Amount:

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.

**Propose New Funding**

Action:

Phase:

Sequence:

Fiscal Year:

Fund:

Fund Source:

PGM:  19 of 250

Description:

Moving In/Out of box:

Box #:

Box Amount:

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.

**Propose New Funding**

Action:

Phase:

Sequence:

Fiscal Year:

Fund:

Fund Source:

PGM:  19 of 250

Description:

Moving In/Out of box:

Box #:

Box Amount:

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

**Propose New Funding**

Action:

Phase:

Sequence:

Fiscal Year:

Fund:

Fund Source:

PGM:  19 of 250

Description:

Moving In/Out of box:

Box #:  -  -  -

Box Amount:

### 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.



Impact Area Information (Click to collapse)

Scope Summary Funding Display Value:  Current  Original

Workflow Information

Estimate Workflow(s):

Estimate Workflow Steps

Front Review  Back Review

Front/Back Steps: None Assigned

Workflow Steps: None assigned

Funding Workflow:

Workflow Steps

Funding Workflow Steps: None assigned

Reason  ?

Impact Description: 21 of 2000

New funding required.

New Funding Request(s)

Action	Phase	Seq	Fiscal Year	PDC	Fund	Fund Source	PGM	Description	Box #	Box Amount	
Add	52	1	2020	\$ 10,000.00	ACEN	Local	25	ACEN - ADVANCE CONSTRUCTION (EBNH)	44110411234	\$ 10,000.00	<a href="#">[Change]</a> <a href="#">[Remove]</a>

[\[Add New Funding Request\]](#)

Save Cancel

- Click "OK" to remove the funding request, or "Cancel" to cancel the operation.

Message from webpage

?

Are you sure you want to remove this funding request?

OK Cancel

### Modifying a New Funding Request

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

- Click "Change" next to the desired funding request. This will open the "Edit Funding" dialog.

**Impact Area Information** (Click to collapse) Display Value:  Current  Original

**Scope Summary** **Funding**

---

**Workflow Information**

Estimate Workflow(s): Estimate Front

---

**Estimate Workflow Steps**

Front Review     Back Review

**Front/Back Steps:** None Assigned

**Workflow Steps:** None assigned

---

**Funding Workflow:** Work Program

---

**Workflow Steps**

**Funding Workflow Steps:** None assigned

---

**Reason** Change/Revision Scope Of Work ?

---

**Impact Description:** 21 of 2000

New funding required.

---

**New Funding Request(s)**

Action	Phase	Seq	Fiscal Year	PDC	Fund	Fund Source	PGM	Description	Box #	Box Amount	
Add	52	1	2020	\$ 10,000.00	ACEN	Local	25	ACEN - ADVANCE CONSTRUCTION (EBNH)	44110411234	\$ 10,000.00	<span style="border: 1px solid red; border-radius: 50%; padding: 2px;">[Change]</span> <span style="border: 1px solid gray; border-radius: 50%; padding: 2px;">[Remove]</span>

[\[Add New Funding Request\]](#)

Save Cancel

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

**Edit Funding**

<b>Action:</b>	<input type="text" value="Add"/>
<b>Phase:</b>	<input type="text" value="5"/> <input type="text" value="2"/>
<b>Sequence:</b>	<input type="text" value="1"/>
<b>Fiscal Year:</b>	<input type="text" value="2020"/>
<b>PDC Amount:</b>	<input type="text" value="10,000"/>
<b>Fund:</b>	<input type="text" value="ACEN - ADVANCE CONSTRUCTION (EBNH)"/>
<b>Fund Source:</b>	<input type="text" value="Local"/>
<b>PGM:</b>	<input type="text" value="25 - BLOCK GRANT"/>
<b>Description:</b>	New funding request.   <span style="float: right;">20 of 250</span>
<b>Moving In/Out of box:</b>	<input checked="" type="checkbox"/>
<b>Box #:</b>	<input type="text" value="441104"/> - <input type="text" value="1"/> - <input type="text" value="12"/> - <input type="text" value="34"/>
<b>Box Amount:</b>	<input type="text" value="10,000"/>
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

**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.

**Overview Information** (Click to collapse) f

No Change Required

Request Description:  30 of 2000

Requested By:  [\[Show all users\]](#) Status: Draft  
 Created Date: 1/16/2020 Submitted Date: 1/17/2020

Select	Impact	Reason	Status	Completed By	Completed Date	Key System Update
<input checked="" type="checkbox"/>	Scope Summary	Scope	Draft			N/A
<input checked="" type="checkbox"/>	Funding	Scope	Draft			
<input checked="" type="checkbox"/>	Critical Schedule	Scope	New			
<input type="checkbox"/>	Project Info					

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.

**Impact Area Information** (Click to collapse) f

Scope Summary **Funding** Critical Schedule Display Value:  Current  Original

Workflow Information

Workflow(s):

Workflow Steps

Workflow Steps: None assigned

Reason:  ?

Impact Description:  35 of 2000

[Hide Dates](#)

Current Schedule (from PSM)

Activity	Description	Early Finish Date (A=Actual)	Expected Finish Date
204010000	PRODUCTION DATE	08/24/2020	Full Date ▼ 8/24/2020 <input type="button" value="Calendar"/>
212010000	PLANS PKG IN TALLAHASSEE	10/21/2020	Full Date ▼ 10/21/2020 <input type="button" value="Calendar"/>
280010000	LETTING DATE	11/04/2020	Full Date ▼ 11/4/2020 <input type="button" value="Calendar"/>
200010000	ADVERTISEMENT DATE	11/18/2020	Full Date ▼ 11/18/2020 <input type="button" value="Calendar"/>
200020000	ADVERTISEMENT PERIOD	12/17/2020	Full Date ▼ 12/17/2020 <input type="button" value="Calendar"/>

### 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.

Impact Area Information (Click to collapse)

Scope Summary Funding Critical Schedule Display Value:  Current  Original

Workflow Information

Workflow(s): Critical Schedules

Workflow Steps

Workflow Steps: None assigned

Reason: Change/Revision Scope Of Work ?

Impact Description: 35 of 2000  
Critical schedule changes required.

[Hide Dates](#)

Current Schedule (from PSM)

Activity	Description	Early Finish Date (A=Actual)	Expected Finish Date	
204010000	PRODUCTION DATE	08/24/2020	Full Date ▼ 8/24/2020	
212010000	PLANS PKG IN TALLAHASSEE	10/21/2020	Full Date ▼ 10/21/2020	
280010000	LETTING DATE	11/04/2020	Fiscal Year ▼ 2020	Changed
200010000	ADVERTISEMENT DATE	11/18/2020	Month/Year ▼ 1/2021	Changed
200020000	ADVERTISEMENT PERIOD	12/17/2020	Full Date ▼ 12/18/2020	Changed

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

**Confirm Fiscal Year Change**

Please confirm that you intended to change the fiscal year for the following critical date (s) by clicking the "Confirm" button. If you did not intend to change the fiscal year for any of the critical date(s), please click the "Cancel" button. Also, please remember to update the funding if you're changing fiscal year(s).

Activity	Description	Finish Date	Proposed Finish Date
200010000	ADVERTISEMENT DATE	11/18/2020	01/01/2021

## 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.

**Overview Information** (Click to collapse) f

No Change Required

Request Description:  30 of 2000

Requested By:  [\[Show all users\]](#) Status: Draft  
 Created Date: 1/16/2020 Submitted Date: 1/17/2020

Select	Impact	Reason	Status	Completed By	Completed Date	Key System Update
<input checked="" type="checkbox"/>	Scope Summary	Scope	Draft			N/A
<input checked="" type="checkbox"/>	Funding	Scope	Draft			
<input checked="" type="checkbox"/>	Critical Schedule	Scope	Draft			
<input checked="" type="checkbox"/>	Project Info	Scope	New			

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.

**Impact Area Information** (Click to collapse)

Scope Summary Funding Critical Schedule **Project Info** Display Value:  Current  Original

**Workflow Information**

**Workflow(s):** 1 Current Year  
1 Gaming  
RFA Federal

**Workflow Steps**

**Workflow Steps:** None assigned

**Reason** Change/Revision Scope Of Work ?

**Impact Description:** 30 of 2000  
Project Info changes required.

**Item Segment** (Click to expand)

**Locations** (Click to expand)

**Description** (Click to expand)

**Item Segment Group** (Click to expand)

Save Cancel

### 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.

**Impact Area Information** (Click to collapse) 7

Scope Summary Funding Critical Schedule **Project Info** Display Value:  Current  Original

Workflow Information

Workflow(s): 1 Current Year  
1 Gaming  
RFA Federal

Workflow Steps

Workflow Steps: None assigned

Reason Change/Revision Scope Of Work ?

Impact Description: 30 of 2000  
Project Info changes required.

**Item Segment** (Click to collapse) 7

	Current	Proposed	
PSEE Project Manager:	DeJuana Genco	Dianne Perkins	Changed
WP Project Manager:	PRD-DFG	Dianne Perkins	Changed
Item Segment Description:	N TURKEY OAK DR FROM NW 11TH AVE TO SR 44	N TURKEY OAK DR FROM NW 11TH AVE TO SR 444	Changed

Item Segment Comments

Comments	Type	
Current: D(07/31/18)/r/nC(05/09/19)	2 - MISC. INFO	<a href="#">[Change]</a> <a href="#">[Remove]</a>
Current: CONSTRUCT 5' SIDEWALK. CRYSTAL RIVER HIGH SCHOOL SRTS	1 - XTRA. DESC	<a href="#">[Change]</a> <a href="#">[Remove]</a>

Locations (Click to expand) ±

Description (Click to expand) ±

Item Segment Group (Click to expand) ±

Save Cancel

## 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.



Item Segment (Click to collapse)		Current	Proposed
PSEE Project Manager:	DeJuana Genco	DeJuana Genco	No Change
WP Project Manager:	PRD-DFG	PRD-DFG	No Change
Item Segment Description:	N TURKEY OAK DR FROM NW 11TH AVE TO SR 44	N TURKEY OAK DR FROM NW 11TH AVE TO SR 44	No Change

Item Segment Comments		Comments	Type
Current:	D(07/31/18)/r/nC(05/09/19)	2 - MISC. INFO	
*** Marked as Removed			[Remove]
Current:	CONSTRUCT 5' SIDEWALK. CRYSTAL RIVER HIGH SCHOOL SRTS	1 - XTRA. DESC	
Proposed:	CONSTRUCT 5' SIDEWALK. CRYSTAL RIVER HIGH SCHOOL SRTS	1 - XTRA. DESC	[Change] [Remove]

- Edit the "Item Segment Comment".
- Click "Save" to save the changes, or "Cancel" to cancel the operation.

Edit Item Segment Comment	
Item Segment Type:	1 - XTRA. DESC
Item Segment Comment:	CONSTRUCT 5' SIDEWALK. CRYSTAL RIVER HIGH SCHOOL SRTS
53 of 1000	
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

### 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:

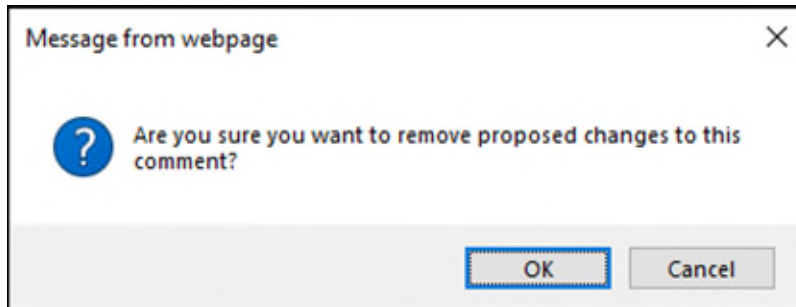
- Click "Remove" next to the desired item segment comment. This will open a confirmation dialog.

Item Segment (Click to collapse)		Current	Proposed
PSEE Project Manager:	DeJuana Genco	DeJuana Genco	No Change
WP Project Manager:	PRD-DFG	PRD-DFG	No Change
Item Segment Description:	N TURKEY OAK DR FROM NW 11TH AVE TO SR 44	N TURKEY OAK DR FROM NW 11TH AVE TO SR 44	No Change

Item Segment Comments		Comments	Type
Current:	D(07/31/18)/r/nC(05/09/19)	2 - MISC. INFO	
*** Marked as Removed			[Remove]
Current:	CONSTRUCT 5' SIDEWALK. CRYSTAL RIVER HIGH SCHOOL SRTS	1 - XTRA. DESC	
Proposed:	CONSTRUCT 5' SIDEWALK. CRYSTAL RIVER HIGH SCHOOL SRTS	1 - XTRA. DESC	[Change] [Remove]

- 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.

Locations (Click to collapse)							
Road							
	Roadway ID	Beginning Point	Ending Point	Roadway Side	Lanes Improved	Lanes Added	Proposed Cross Section
<input checked="" type="checkbox"/>	Current: 87090000	8.096	9.486	C - COMPOSITE	6	2	4 - MUNICIPAL DIVIDED
<input type="checkbox"/>	Proposed: 87090000	8.096	9.487	C - COMPOSITE	6	2	4 - MUNICIPAL DIVIDED <a href="#">[Change]</a> <a href="#">[Remove]</a>
<a href="#">[Add Road]</a>							
Trail							
No trails exist.							
<a href="#">[Add Trail]</a>							
Airport							
No airports exist.							
<a href="#">[Add Airport]</a>							
Seaport							
No seaports exist.							
<a href="#">[Add Seaport]</a>							
Bridge							
No bridges exist.							
<a href="#">[Add Bridge]</a>							
Transit System							
No transit systems exist.							
<a href="#">[Add Transit System]</a>							

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.

**Add Item Segment Location - ROADWAY**

**Roadway ID:** 87000000 - COUNTY-WIDE ROADS

**Roadway Range:** 0 - 999.999

**Beginning Point:** 10.487

**Ending Point:** 11.487

**Roadway Side:** C - COMPOSITE

**Lanes Improved:** 2

**Lanes Added:** 2

**Proposed Cross Section:** 4 - MUNICIPAL DIVIDED

### 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.

Locations (Click to collapse)								
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	<a href="#">[Change]</a> <a href="#">[Remove]</a>
New:	87000000	10.487	11.487	C - COMPOSITE	2	2	4 - MUNICIPAL DIVIDED	<a href="#">[Change]</a> <a href="#">[Remove]</a>
<a href="#">[Add Road]</a>								
Trail								
No trails exist.								
<a href="#">[Add Trail]</a>								
Airport								
No airports exist.								
<a href="#">[Add Airport]</a>								
Seaport								
No seaports exist.								
<a href="#">[Add Seaport]</a>								
Bridge								
No bridges exist.								
<a href="#">[Add Bridge]</a>								
Transit System								
No transit systems exist.								
<a href="#">[Add Transit System]</a>								

2. Make the necessary modifications to the roadway details.

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

**Edit Item Segment Location - ROADWAY**

**Roadway Range:** 0 - 999.999

**Beginning Point:**

**Ending Point:**

**Roadway Side:**  ▼

**Lanes Improved:**

**Lanes Added:**

**Proposed Cross Section:**  ▼

### 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:

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

**Locations** (Click to collapse) f

**Road**

No roads exist.

[\[Add Road\]](#)

---

**Trail**

	Trail ID	Beginning Point	Ending Point	
☐ Current:	59931001	0	2.7	
☐ Proposed:	59931001	0	2.8	<a href="#">[Change]</a> <a href="#">[Remove]</a>

[\[Add Trail\]](#)

---

**Airport**

No airports exist.

[\[Add Airport\]](#)

---

**Seaport**

No seaports exist.

[\[Add Seaport\]](#)

---

**Bridge**

No bridges exist.

[\[Add Bridge\]](#)

---

**Transit System**

No transit systems exist.

[\[Add Transit System\]](#)

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.

**Add Item Segment Location - NON-MOTORIZED WAY**

Trail ID:

Beginning Point:

Ending Point:

### 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.

**Locations** (Click to collapse) ↑

**Road**

No roads exist.  
[\[Add Road\]](#)

---

**Trail**

	Trail ID	Beginning Point	Ending Point	
☑ Current:	59931001	0	2.7	
☑ Proposed:	59931001	0	2.8	<a href="#">[Change]</a> <a href="#">[Remove]</a>
☑ New:	59931001	2.8	3	<a href="#">[Change]</a> <a href="#">[Remove]</a>

[\[Add Trail\]](#)

---

**Airport**

No airports exist.  
[\[Add Airport\]](#)

---

**Seaport**

No seaports exist.  
[\[Add Seaport\]](#)

---

**Bridge**

No bridges exist.  
[\[Add Bridge\]](#)

---

**Transit System**

No transit systems exist.  
[\[Add Transit System\]](#)

2. Make the necessary modifications to the trail details.

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

**Edit Item Segment Location - NON-MOTORIZED WAY**

**Beginning Point:**

**Ending Point:**

### 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:

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

**Locations** (Click to collapse) ⌵

---

**Road**

No roads exist.

[\[Add Road\]](#)

---

**Trail**

No trails exist.

[\[Add Trail\]](#)

---

**Airport**

	Airport Site ID	FFP Code	JACIP UPIN	
<input checked="" type="checkbox"/>	Current: 3102*A		PFL0012808	
<input type="checkbox"/>	Proposed: 3102*A	123	PFL0012808	<a href="#">[Change]</a> <a href="#">[Remove]</a>

[\[Add Airport\]](#)

---

**Seaport**

No seaports exist.

[\[Add Seaport\]](#)

---

**Bridge**

No bridges exist.

[\[Add Bridge\]](#)

---

**Transit System**

No transit systems exist.

[\[Add Transit System\]](#)

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

**Add Item Segment Location - AIRPORT**

**Airport Site ID:**

**FFP Code:**

**JACIP UPIN:**

### 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.

**Locations** (Click to collapse)

Road

No roads exist.

[\[Add Road\]](#)

Trail

No trails exist.

[\[Add Trail\]](#)

Airport

	Airport Site ID	FFP Code	JACIP UPIN	
☐ Current:	3102*A		PFL0012808	
☐ Proposed:	3102*A	123	PFL0012808	<a href="#">[Change]</a> <a href="#">[Remove]</a>
☐ New:	3098*A	456	ABC123	<a href="#">[Change]</a> <a href="#">[Remove]</a>

[\[Add Airport\]](#)

Seaport

No seaports exist.

[\[Add Seaport\]](#)

Bridge

No bridges exist.

[\[Add Bridge\]](#)

Transit System

No transit systems exist.

[\[Add Transit System\]](#)

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

**Edit Item Segment Location - AIRPORT**

FFP Code:

JACIP UPIN:

### 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.

**Locations** (Click to collapse) ↑

Road

No roads exist.

[\[Add Road\]](#)

Trail

No trails exist.

[\[Add Trail\]](#)

Airport

No airports exist.

[\[Add Airport\]](#)

Seaport

	Seaport ID	SeaCIP	
<input type="checkbox"/> Current:	006		
<input type="checkbox"/> Proposed:	006	123456	<a href="#">[Change]</a> <a href="#">[Remove]</a>

[\[Add Seaport\]](#)

Bridge

No bridges exist.

[\[Add Bridge\]](#)

Transit System

No transit systems exist.

[\[Add Transit System\]](#)

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.



**Add Item Segment Location - SEAPORT**

**Seaport ID:** 006-PORT & TRANSIT AUTHORITY OF KEY WEST ▾

**SeaCIP UPIN:** ABC123  x

## 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.

**Locations** (Click to collapse) ?

Road

No roads exist.

[\[Add Road\]](#)

Trail

No trails exist.

[\[Add Trail\]](#)

Airport

No airports exist.

[\[Add Airport\]](#)

Seaport

	Seaport ID	SeaCIP		
☐ Current:	006			
☐ Proposed:	006	123456	<a href="#">[Change]</a>	<a href="#">[Remove]</a>
☐ New:	006	ABC123	<a href="#">[Change]</a>	<a href="#">[Remove]</a>

[\[Add Seaport\]](#)

Bridge

No bridges exist.

[\[Add Bridge\]](#)

Transit System

No transit systems exist.

[\[Add Transit System\]](#)

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

**Edit Item Segment Location - SEAPORT**

SeaCIP UPIN:  x

### 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.

**Locations** (Click to collapse) f

Road

No roads exist.

[\[Add Road\]](#)

Trail

No trails exist.

[\[Add Trail\]](#)

Airport

No airports exist.

[\[Add Airport\]](#)

Seaport

No seaports exist.

[\[Add Seaport\]](#)

Bridge

	Roadway ID	Bridge No.	
New:	86470000	L042	<a href="#">[Remove]</a>
<a href="#">[Add Bridge]</a>			

Transit System

No transit systems exist.

[\[Add Transit System\]](#)

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.

**Add Item Segment Location - BRIDGE**

Roadway ID:  ▼

Bridge No.  ▼

### 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.

**Locations** (Click to collapse) ↑

Road

No roads exist.

[\[Add Road\]](#)

Trail

No trails exist.

[\[Add Trail\]](#)

Airport

No airports exist.

[\[Add Airport\]](#)

Seaport

No seaports exist.

[\[Add Seaport\]](#)

Bridge

No bridges exist.

[\[Add Bridge\]](#)

Transit System

	Grant Recipient ID	TransCIP UPIN	
☐ Current:	ALACHA - ALACHUA COUNTY		
☐ Proposed:	ALACHA	ABC123	<a href="#">[Change]</a> <a href="#">[Remove]</a>

[\[Add Transit System\]](#)

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.

**Add Item Segment Location - TRANSIT SYSTEM**

Grant Recipient ID: BAF - BREVARD ALZHEIMER'S FOUNDATION ▼

TransCIP UPIN: ABC123

Save
Cancel

### 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.

**Locations** (Click to collapse) ?

Road

No roads exist.

[\[Add Road\]](#)

Trail

No trails exist.

[\[Add Trail\]](#)

Airport

No airports exist.

[\[Add Airport\]](#)

Seaport

No seaports exist.

[\[Add Seaport\]](#)

Bridge

No bridges exist.

[\[Add Bridge\]](#)

Transit System

	Grant Recipient ID	TransCIP UPIN	
☐ Current:	ALACHA - ALACHUA COUNTY		
☐ Proposed:	ALACHA	ABC123	<a href="#">[Change]</a> <a href="#">[Remove]</a>
☐ New:	BAF	ABC123	<a href="#">[Change]</a> <a href="#">[Remove]</a>

[\[Add Transit System\]](#)

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

**Edit Item Segment Location - TRANSIT SYSTEM**

Grant Recipient ID:  ▼

TransCIP UPIN:

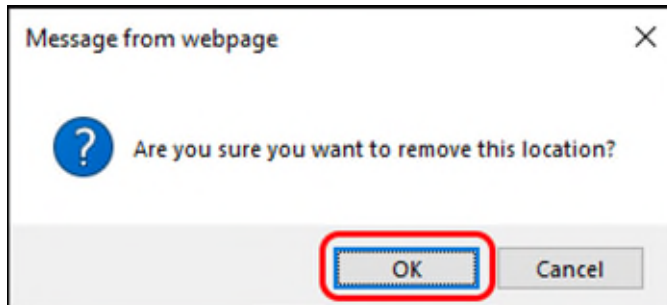
### Removing a Location

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.

Locations (Click to collapse)							
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 <a href="#">[Change]</a> <a href="#">[Remove]</a>
☑ New:	87000000	10.487	11.487	C - COMPOSITE	2	2	4 - MUNICIPAL DIVIDED <a href="#">[Change]</a> <a href="#">[Remove]</a>
<a href="#">[Add Road]</a>							
Trail							
No trails exist.							
<a href="#">[Add Trail]</a>							
Airport							
No airports exist.							
<a href="#">[Add Airport]</a>							
Seaport							
No seaports exist.							
<a href="#">[Add Seaport]</a>							
Bridge							
No bridges exist.							
<a href="#">[Add Bridge]</a>							
Transit System							
No transit systems exist.							
<a href="#">[Add Transit System]</a>							

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 <a href="#">[Change]</a> <a href="#">[Remove]</a>

[\[Add Road\]](#)

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 <a href="#">[Change]</a> <a href="#">[Remove]</a>
<b>Location Comments</b> (Click to collapse) <span style="float: right;">↑</span>							
Current:	RELOCATE THE NW 105 WAY BRIDGE OVER MIAMI CANAL WEST OF						<a href="#">[Change]</a> <a href="#">[Remove]</a>
Current:	105 WAY						
*** Marked as Removed						<a href="#">[Remove]</a>	
<a href="#">[Add Location Comment]</a>							
<b>Location Work Mix</b> (Click to collapse) <span style="float: right;">↑</span>							
No location work mixes exist.							
<a href="#">[Add Location Work Mix]</a>							

[\[Add Road\]](#)

## 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.

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 <a href="#">[Change]</a> <a href="#">[Remove]</a>	
<b>Location Comments</b> (Click to collapse) <span style="float: right;">⌵</span>								
Current:	RELOCATE THE NW 105 WAY BRIDGE OVER MIAMI CANAL WEST OF						<a href="#">[Change]</a>	<a href="#">[Remove]</a>
Current:	105 WAY							
*** Marked as Removed							<a href="#">[Remove]</a>	
<a href="#">[Add Location Comment]</a>								
<b>Location Work Mix</b> (Click to collapse) <span style="float: right;">⌵</span>								
No location work mixes exist.								
<a href="#">[Add Location Work Mix]</a>								
<a href="#">[Add Road]</a>								

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

### Add Location Comment

Comment:

### 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.

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 <a href="#">[Change]</a> <a href="#">[Remove]</a>	
<b>Location Comments</b> (Click to collapse) <span style="float: right;">⌵</span>								
Current:	RELOCATE THE NW 105 WAY BRIDGE OVER MIAMI CANAL WEST OF						<a href="#">[Change]</a>	<a href="#">[Remove]</a>
Current:	105 WAY							
*** Marked as Removed							<a href="#">[Remove]</a>	
<a href="#">[Add Location Comment]</a>								
<b>Location Work Mix</b> (Click to collapse) <span style="float: right;">⌵</span>								
No location work mixes exist.								
<a href="#">[Add Location Work Mix]</a>								
<a href="#">[Add Road]</a>								

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

**Edit Location Comment**

**Comment:**

### Removing a Location Comment

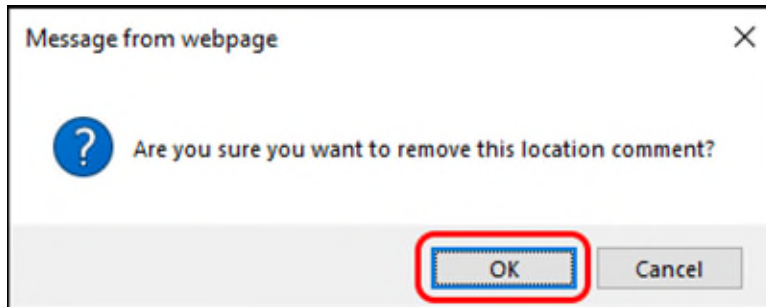
Current, proposed, or new location comments may be removed from a location. To remove a location comment, take the following steps:

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

Locations (Click to collapse)							
Road							
	Roadway ID	Beginning Point	Ending Point	Roadway Side	Lanes Improved	Lanes Added	Proposed Cross Section
<input type="checkbox"/> Current:	87090000	8.096	9.486	C - COMPOSITE	6	2	4 - MUNICIPAL DIVIDED
<input type="checkbox"/> Proposed:	87090000	8.096	9.487	C - COMPOSITE	6	2	4 - MUNICIPAL DIVIDED <a href="#">[Change]</a> <a href="#">[Remove]</a>
<input type="checkbox"/> New:	87000000	10.487	11.487	C - COMPOSITE	2	2	4 - MUNICIPAL DIVIDED <a href="#">[Change]</a> <a href="#">[Remove]</a>
<a href="#">[Add Road]</a>							
Trail							
No trails exist.							
<a href="#">[Add Trail]</a>							
Airport							
No airports exist.							
<a href="#">[Add Airport]</a>							
Seaport							
No seaports exist.							
<a href="#">[Add Seaport]</a>							
Bridge							
No bridges exist.							
<a href="#">[Add Bridge]</a>							
Transit System							
No transit systems exist.							
<a href="#">[Add Transit System]</a>							

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
<input checked="" type="checkbox"/>	Current: 10160000	4.846	5.603	C - COMPOSITE	7	0	
	Proposed: 10160000	4.846	5.603	C - COMPOSITE	7	0	<a href="#">[Change]</a> <a href="#">[Remove]</a>
<input type="checkbox"/>	Current: 10160000	5.603	7.142	C - COMPOSITE	6	0	<a href="#">[Change]</a> <a href="#">[Remove]</a>
<input type="checkbox"/>	Current: 10160000	7.142	7.494	C - COMPOSITE	7	0	<a href="#">[Change]</a> <a href="#">[Remove]</a>
<input type="checkbox"/>	Current: 10160000	7.494	8.903	C - COMPOSITE	6	0	<a href="#">[Change]</a> <a href="#">[Remove]</a>
<input type="checkbox"/>	Current: 10160000	8.903	9.142	C - COMPOSITE	5	0	<a href="#">[Change]</a> <a href="#">[Remove]</a>

[\[Add Road\]](#)

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
<input type="checkbox"/>	Current: 10160000	4.846	5.603	C - COMPOSITE	7	0	
	Proposed: 10160000	4.846	5.603	C - COMPOSITE	7	0	<a href="#">[Change]</a> <a href="#">[Remove]</a>
<b>Location Comments</b> (Click to collapse)							
No location comments exist.							
<a href="#">[Add Location Comment]</a>							
<b>Location Work Mix</b> (Click to collapse)							
	Current: 0107 - BIKE LANE/SIDEWALK				1		
	Proposed: 0107 - BIKE LANE/SIDEWALK				2		<a href="#">[Change]</a> <a href="#">[Remove]</a>
	Current: 0774 - SIGNING/PAVEMENT MARKINGS				1		<a href="#">[Change]</a> <a href="#">[Remove]</a>
<a href="#">[Add Location Work Mix]</a>							
<input type="checkbox"/>	Current: 10160000	5.603	7.142	C - COMPOSITE	6	0	<a href="#">[Change]</a> <a href="#">[Remove]</a>
<input type="checkbox"/>	Current: 10160000	7.142	7.494	C - COMPOSITE	7	0	<a href="#">[Change]</a> <a href="#">[Remove]</a>
<input type="checkbox"/>	Current: 10160000	7.494	8.903	C - COMPOSITE	6	0	<a href="#">[Change]</a> <a href="#">[Remove]</a>
<input type="checkbox"/>	Current: 10160000	8.903	9.142	C - COMPOSITE	5	0	<a href="#">[Change]</a> <a href="#">[Remove]</a>

[\[Add Road\]](#)

### 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.

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	<a href="#">[Change]</a> <a href="#">[Remove]</a>
<b>Location Comments</b> (Click to collapse)							
No location comments exist.							
<a href="#">[Add Location Comment]</a>							
<b>Location Work Mix</b> (Click to collapse)							
Current:	0107 - BIKE LANE/SIDEWALK			1			
Proposed:	0107 - BIKE LANE/SIDEWALK			2		<a href="#">[Change]</a> <a href="#">[Remove]</a>	
Current:	0774 - SIGNING/PAVEMENT MARKINGS			1		<a href="#">[Change]</a> <a href="#">[Remove]</a>	
<a href="#">[Add Location Work Mix]</a>							
☒ Current:	10160000	5.603	7.142	C - COMPOSITE	6	0	<a href="#">[Change]</a> <a href="#">[Remove]</a>
☒ Current:	10160000	7.142	7.494	C - COMPOSITE	7	0	<a href="#">[Change]</a> <a href="#">[Remove]</a>
☒ Current:	10160000	7.494	8.903	C - COMPOSITE	6	0	<a href="#">[Change]</a> <a href="#">[Remove]</a>
☒ Current:	10160000	8.903	9.142	C - COMPOSITE	5	0	<a href="#">[Change]</a> <a href="#">[Remove]</a>
<a href="#">[Add Road]</a>							

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.

**Add Location Work Mix**

**Workmix:**

**Quantity:**

### 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.

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	<a href="#">[Change]</a> <a href="#">[Remove]</a>
<b>Location Comments</b> (Click to collapse) ↑							
No location comments exist.							
<a href="#">[Add Location Comment]</a>							
<b>Location Work Mix</b> (Click to collapse) ↑							
Current:	0107 - BIKE LANE/SIDEWALK			1			
Proposed:	0107 - BIKE LANE/SIDEWALK			2			<a href="#">[Change]</a> <a href="#">[Remove]</a>
Current:	0774 - SIGNING/PAVEMENT MARKINGS			1			<a href="#">[Change]</a> <a href="#">[Remove]</a>
<a href="#">[Add Location Work Mix]</a>							
☐ Current:	10160000	5.603	7.142	C - COMPOSITE	6	0	<a href="#">[Change]</a> <a href="#">[Remove]</a>
☐ Current:	10160000	7.142	7.494	C - COMPOSITE	7	0	<a href="#">[Change]</a> <a href="#">[Remove]</a>
☐ Current:	10160000	7.494	8.903	C - COMPOSITE	6	0	<a href="#">[Change]</a> <a href="#">[Remove]</a>
☐ Current:	10160000	8.903	9.142	C - COMPOSITE	5	0	<a href="#">[Change]</a> <a href="#">[Remove]</a>
<a href="#">[Add Road]</a>							

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

**Edit Location Work Mix**

Quantity:

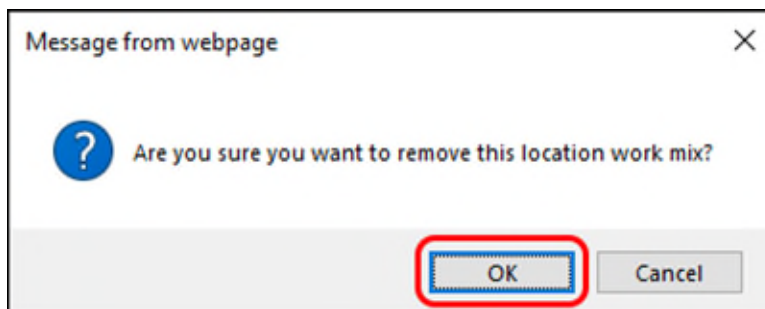
### Removing a Location Work Mix

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.

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	<a href="#">[Change]</a> <a href="#">[Remove]</a>
<b>Location Comments</b> (Click to collapse)							
No location comments exist.							
<a href="#">[Add Location Comment]</a>							
<b>Location Work Mix</b> (Click to collapse)							
Current:	0107 - BIKE LANE/SIDEWALK			1			
Proposed:	0107 - BIKE LANE/SIDEWALK			2			<a href="#">[Change]</a> <a href="#">[Remove]</a>
Current:	0774 - SIGNING/PAVEMENT MARKINGS			1			<a href="#">[Change]</a> <a href="#">[Remove]</a>
<a href="#">[Add Location Work Mix]</a>							
☐ Current:	10160000	5.603	7.142	C - COMPOSITE	6	0	<a href="#">[Change]</a> <a href="#">[Remove]</a>
☐ Current:	10160000	7.142	7.494	C - COMPOSITE	7	0	<a href="#">[Change]</a> <a href="#">[Remove]</a>
☐ Current:	10160000	7.494	8.903	C - COMPOSITE	6	0	<a href="#">[Change]</a> <a href="#">[Remove]</a>
☐ Current:	10160000	8.903	9.142	C - COMPOSITE	5	0	<a href="#">[Change]</a> <a href="#">[Remove]</a>
<a href="#">[Add Road]</a>							

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 “Transportation 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.

**Impact Area Information** (Click to collapse)

Scope Summary Funding Critical Schedule **Project Info** Display Value:  Current  Original

Workflow Information

Workflow(s): 1 Current Year ^  
1 Gaming  
RFA Federal v

Workflow Steps

Workflow Steps: Maidolys Aguado

Reason: Change/Revision Scope Of Work ?

Impact Description: 30 of 2000  
Project info changes required.

Item Segment (Click to expand)

Locations (Click to expand)

Description (Click to collapse)

	Current	Proposed	
Transportation System:	06 - NON-INTRASTATE OFF STATE HIGHW	06 - NON-INTRASTATE OFF STATE HIGHW v	No Change
Work Mix:	0205 - SIDEWALK	0126 - TOLL DATA CENTER v	Changed
Contract Class:	1 - TALLAHASSEE LET	1 - TALLAHASSEE LET v	No Change

Item Segment Group (Click to expand)

Save Cancel

### 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.

**Impact Area Information** (Click to collapse)

Scope Summary Funding Critical Schedule Project Info Display Value:  Current  Original

Workflow Information

Workflow(s): 1 Current Year ^  
1 Gaming v  
RFA Federal v

Workflow Steps

Workflow Steps: Maidolys Aguado

Reason Change/Revision Scope Of Work ?

Impact Description: 30 of 2000  
Project info changes required.

Item Segment (Click to expand) ±

Locations (Click to expand) ±

Description (Click to expand) ±

Item Segment Group (Click to collapse) ?

Group	Description	
Current: SRTS	Srts Projects 7-1-2012 Adopted	[Remove]

[Add Item Segment Group](#)

Save Cancel

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.

**Add Item Segment Group**

Item Segment Group: Approved 4P Scope v

Save Cancel

### 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.

Impact Area Information (Click to collapse)

Scope Summary Funding Critical Schedule Project Info Display Value:  Current  Original

Workflow Information

Workflow(s): 1 Current Year ^  
1 Gaming v  
RFA Federal v

Workflow Steps

Workflow Steps: Maidolys Aguado

Reason: Change/Revision Scope Of Work ?

Impact Description: 30 of 2000  
Project info changes required.

Item Segment (Click to expand) ±

Locations (Click to expand) ±

Description (Click to expand) ±

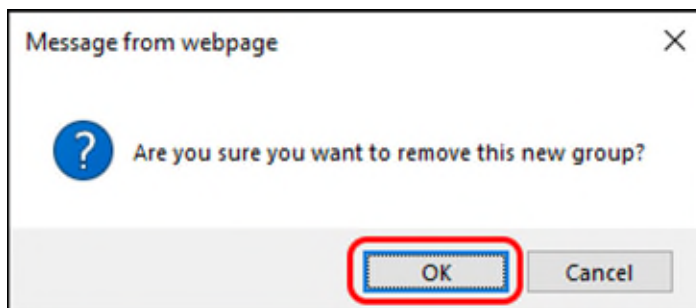
Item Segment Group (Click to collapse) ±

Group	Description	
New: 4P	Approved 4P Scope	[Remove]
Current: SRTS	Srts Projects 7-1-2012 Adopted	[Remove]

[\[Add Item Segment Group\]](#)

Save Cancel

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.

Reviewer Assignments (Click to collapse)						
<b>SCOPE SUMMARY - Reviewer Assignments (Click to collapse)</b>						
Order	Type	Reviewer	Assignment Group	Status	Completed Date	Action(s)
2	Reviewer	<a href="#">Tim Folsom</a>		Approved	1/9/2020	
3	Reviewer	<a href="#">Renee Calo</a>		Approved	1/9/2020	
<b>FUNDING - Reviewer Assignments (Click to collapse)</b>						
Estimate Reviewers						
Order	Type	Reviewer	Assignment Group	Status	Completed Date	Action(s)
1	Reviewer	<a href="#">Mark Wolfe</a>		Approved	1/9/2020	
Funding Reviewers						
No assignments currently exist.						
<b>CRITICAL SCHEDULE - Reviewer Assignments (Click to collapse)</b>						
Order	Type	Reviewer	Assignment Group	Status	Completed Date	Action(s)
1	Reviewer	<a href="#">Ana Gonzalez</a>		Approved	1/9/2020	
<b>PROJECT INFO - Reviewer Assignments (Click to collapse)</b>						
Order	Type	Reviewer	Assignment Group	Status	Completed Date	Action(s)
1	Reviewer	<a href="#">Mark Wolfe</a>		Approved	1/9/2020	

## 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.

CRITICAL SCHEDULE - Reviewer Assignments (Click to collapse)						
Order	Type	Reviewer	Assignment Group	Status	Completed Date	Action(s)
1	Reviewer	<a href="#">Ana Gonzalez</a>		In Review		
<a href="#">(Add Assignment)</a>						

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.



**Add Change Request Assignment**

Type:

User Or Group:  User  AD Group

Reviewer:  [\[Show all users\]](#)


- Perkins, Casey (KNTHFCP)
- Perkins, Dianne (PS972DP)
- Perkins, Rachel (PL930RP)

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

**Add Change Request Assignment**

Type:

User Or Group:  User  AD Group

Assignee Group:  

Assignment Group:

### Removing an Assignment

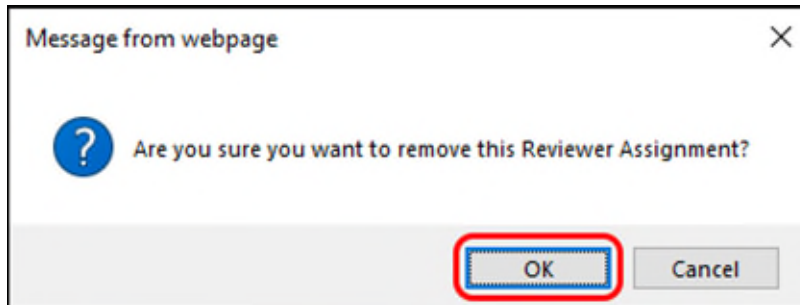
A Project Manager or a user with the proper "Manage Assignment" privilege may remove reviewer assignments from a Change Request Package. To remove a reviewer assignment from a Change Request Package, follow these steps:

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

CRITICAL SCHEDULE - Reviewer Assignments (Click to collapse)						
Order	Type	Reviewer	Assignment Group	Status	Completed Date	Action(s)
1	Reviewer	Ana Gonzalez		Pending		<a href="#">[Remove]</a>

[\[Add Assignment\]](#)

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



## Reordering Assignments

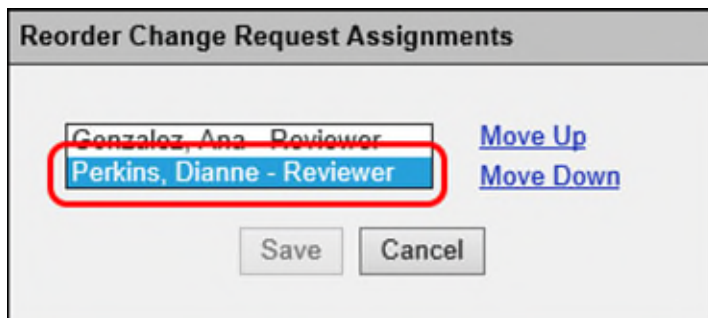
When an impact area contains more than one reviewer assignment, the reviewer assignments may be reordered in the following way:

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

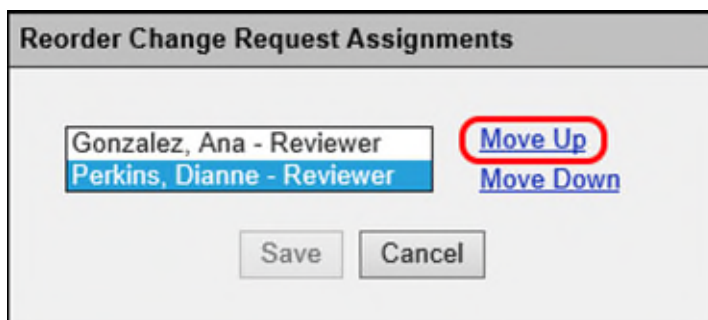
CRITICAL SCHEDULE - Reviewer Assignments (Click to collapse)						
Order	Type	Reviewer	Assignment Group	Status	Completed Date	Action(s)
1	Reviewer	Ana Gonzalez		Pending		<a href="#">[Remove]</a>
2	Reviewer	Dianne Perkins		Pending		<a href="#">[Remove]</a>

[\[Add Assignment\]](#) [\[Reorder Assignments\]](#)

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.

**Reorder Change Request Assignments**

Perkins, Dianne - Reviewer

[Move Up](#)

Gonzalez, Ana - Reviewer

[Move Down](#)

Save

Cancel

**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.

CRITICAL SCHEDULE - Reviewer Assignments (Click to collapse)						
Order	Type	Reviewer	Assignment Group	Status	Completed Date	Action(s)
1	Reviewer	Dianne Perkins		In Review		<a href="#">[Status Update]</a> <a href="#">[Request Changes]</a> <a href="#">[Clarify]</a> <a href="#">[Remove]</a>
2	Reviewer	Ana Gonzalez		Pending		

[\[Add Assignment\]](#)

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.

**Update Status of Request Assignment**

Status:

23 of 2000

Comment:

Save

Cancel

### 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.

CRITICAL SCHEDULE - Reviewer Assignments (Click to collapse)						
Order	Type	Reviewer	Assignment Group	Status	Completed Date	Action(s)
1	Reviewer	Dianne Perkins		In Review		<a href="#">[Status Update]</a> <a href="#">[Request Changes]</a> <a href="#">[Clarify]</a> <a href="#">[Remove]</a>
2	Reviewer	Ana Gonzalez		Pending		

[\[Add Assignment\]](#)

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

### Revise for Resubmission Confirmation

Resume with Current Review on Resubmission (Restricted to District Administrators)

Revise for Resubmission Comment: 17 of 400

Changes required.

Continue
Cancel

**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.

CRITICAL SCHEDULE - Reviewer Assignments (Click to collapse)						
Order	Type	Reviewer	Assignment Group	Status	Completed Date	Action(s)
1	Reviewer	Dianne Perkins		In Review		<a href="#">[Status Update]</a> <a href="#">[Request Changes]</a> <a href="#">[Clarify]</a> <a href="#">[Remove]</a>
2	Reviewer	Ana Gonzalez		Pending		

[\[Add Assignment\]](#)

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

### Request Clarification of Change Request

Request Clarification Comment:

Please clarify.

Continue
Cancel

**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.

CRITICAL SCHEDULE - Reviewer Assignments (Click to collapse)						
Order	Type	Reviewer	Assignment Group	Status	Completed Date	Action(s)
1	Reviewer	Dianne Perkins		In Review		<span style="border: 2px solid red; padding: 2px;">[Status Update]</span> [Request Changes] [Clarify] [Remove]
2	Reviewer	Ana Gonzalez		Pending		

[\[Add Assignment\]](#)

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.

### Update Status of Request Assignment

Status: Approved ▼

9 of 2000

Comment:

Approved.

Save
Cancel

**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.

CRITICAL SCHEDULE - Reviewer Assignments (Click to collapse)						
Order	Type	Reviewer	Assignment Group	Status	Completed Date	Action(s)
1	Reviewer	Dianne Perkins		In Review		[Status Update] [Request Changes] [Clarify] [Remove]
2	Reviewer	Ana Gonzalez		Pending		

[Add Assignment]

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.

### Update Status of Request Assignment

Status: Rejected ▼

Comment:  9 of 2000

Save
Cancel

**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.

FYI Assignments (Click to collapse)			
User	Impact Area	Comment	Action(s)
Dianne Perkins	CRITICAL SCHEDULE		<a href="#">[Edit Comment]</a> <a href="#">[Remove]</a>
<a href="#">[Add Assignment]</a>			

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.

### Add Change Request Assignment

User Or Group:  User  AD Group

User:  [\[Show all users\]](#)

### 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.

FYI Assignments (Click to collapse)			
User	Impact Area	Comment	Action(s)
Dianne Perkins	CRITICAL SCHEDULE		<a href="#">[Edit Comment]</a> <a href="#">[Remove]</a>
<a href="#">[Add Assignment]</a>			

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

### Edit Change Request Assignment

Comment:  23 of 2000

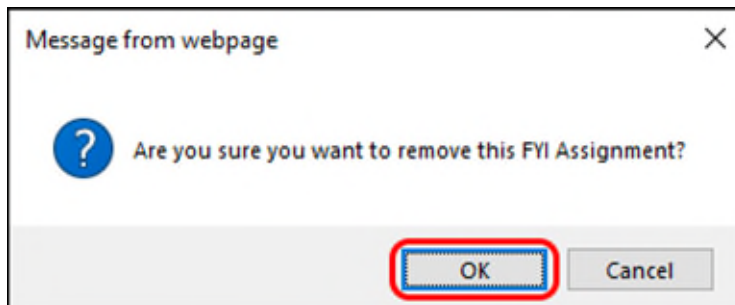
## Removing an FYI Assignment

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.

FYI Assignments (Click to collapse)			
User	Impact Area	Comment	Action(s)
Dianne Perkins	CRITICAL SCHEDULE		<a href="#">[Edit Comment]</a> <a href="#">[Remove]</a>
<a href="#">[Add Assignment]</a>			

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.

Change Package Documents (Click to collapse)						
EDMS Doc No	Created By	Created Date	Document Name	Description	Type	
9536755	Mark Wolfe	1/16/2020	Funding Changes.docx	Funding changes.	Funding	<a href="#">View</a> <a href="#">[Edit]</a> <a href="#">[Remove]</a>
Page 1 (Showing Items 1 to 1 of 1) Show per page 10 25 50						
<a href="#">[Add Document]</a>						

## 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.



Change Package Documents (Click to collapse)						
EDMS Doc No	Created By	Created Date	Document Name	Description	Type	
9536755	Mark Wolfe	1/16/2020	Funding Changes.docx	Funding changes.	Funding	<a href="#">View</a> <a href="#">[Edit]</a> <a href="#">[Remove]</a>

Page 1 (Showing Items 1 to 1 of 1) Show per page 10 25 50

[Add Document!](#)

- 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.

### Upload Change Request Document

File:  0 %

File Type:

Description:  0 of 200

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

### Upload Change Request Document

File:  100 % Upload Complete

Funding Changes.docx

File Type:

Description:  16 of 200

## Editing a Document

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

- Click the “Edit” link next to the desired document. This will open the “Edit Change Request Document” dialog.

Change Package Documents (Click to collapse)						
EDMS Doc No	Created By	Created Date	Document Name	Description	Type	
9536755	Mark Wolfe	1/16/2020	Funding Changes.docx	Funding changes.	Funding	<a href="#">View</a> <a href="#">(Edit)</a> <a href="#">(Remove)</a>

Page 1 (Showing Items 1 to 1 of 1) Show per page 10 25 50

[\[Add Document\]](#)

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

### Edit Change Request Document

File Type:

Description:  16 of 200

### 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.


Change Package Documents (Click to collapse)						
EDMS Doc No	Created By	Created Date	Document Name	Description	Type	
9536755	Mark Wolfe	1/16/2020	Funding Changes.docx	Funding changes.	Funding	<a href="#">View</a> <a href="#">(Edit)</a> <a href="#">(Remove)</a>

Page 1 (Showing Items 1 to 1 of 1) Show per page 10 25 50

[\[Add Document\]](#)

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

Message from webpage

 Are you sure you want to delete document #9536755?

### 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.

Change Package Comments/History (Click to collapse)						
Date	MadeBy	Information	Step	Result	Comment	
1/10/2020 9:11 AM	Mark Wolfe	Change Package	IN REVIEW	RESUBMITTED		
1/9/2020 3:14 PM	Mark Wolfe	Review Notes	SCHEDULE APPROVAL	RESTARTED	dfgsdf	
1/9/2020 2:28 PM	Mark Wolfe	Change Package	IN REVIEW	SUBMITTED		
1/9/2020 2:28 PM	Mark Wolfe	Change Package	DRAFT	CREATED		

[\[Add Comment\]](#)

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

**Add Comment**

Comment:  26 of 2048

### Removing a Comment

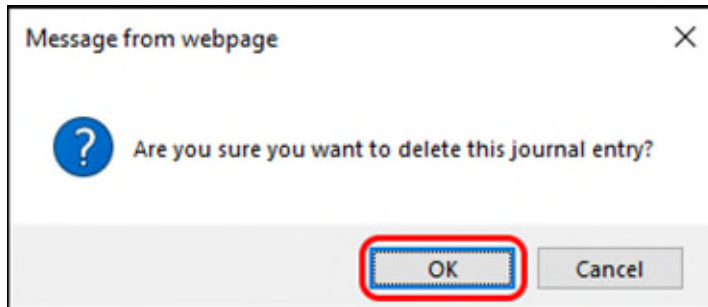
User generated comments may also be removed. To remove a comment, follow these steps:

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

Change Package Comments/History (Click to collapse)						
Date	MadeBy	Information	Step	Result	Comment	
1/16/2020 1:29 PM	Mark Wolfe	Commented			Funding changes required.	<a href="#">[Remove]</a>
1/10/2020 9:11 AM	Mark Wolfe	Change Package	IN REVIEW	RESUBMITTED		
1/9/2020 3:14 PM	Mark Wolfe	Review Notes	SCHEDULE APPROVAL	RESTARTED	dfgsdf	
1/9/2020 2:28 PM	Mark Wolfe	Change Package	IN REVIEW	SUBMITTED		
1/9/2020 2:28 PM	Mark Wolfe	Change Package	DRAFT	CREATED		

[\[Add Comment\]](#)

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.

Change Package Comments/History (Click to collapse)						
	Date	MadeBy	Information	Step	Result	Comment
+	1/10/2020 9:11 AM	Mark Wolfe	Change Package	IN REVIEW	RESUBMITTED	
+	1/9/2020 3:14 PM	Mark Wolfe	Review Notes	SCHEDULE APPROVAL	RESTARTED	dfgsdf
+	1/9/2020 2:28 PM	Mark Wolfe	Change Package	IN REVIEW	SUBMITTED	
+	1/9/2020 2:28 PM	Mark Wolfe	Change Package	DRAFT	CREATED	

[\[Add Comment\]](#)

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

Change Package Comments/History (Click to collapse)						
	Date	MadeBy	Information	Step	Result	Comment
-	1/10/2020 9:11 AM	Mark Wolfe	Change Package	IN REVIEW	RESUBMITTED	
No Responses						
<a href="#">[Add Response to Journal Entry]</a>						
+	1/9/2020 3:14 PM	Mark Wolfe	Review Notes	SCHEDULE APPROVAL	RESTARTED	dfgsdf
+	1/9/2020 2:28 PM	Mark Wolfe	Change Package	IN REVIEW	SUBMITTED	
+	1/9/2020 2:28 PM	Mark Wolfe	Change Package	DRAFT	CREATED	

[\[Add Comment\]](#)

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

**Add Response**

Comment: 46 of 2048

Response to Change Request Package submission.

**Optional Document**

File:  100 % ▲ Upload Complete

Funding Changes.docx

File Type: Funding ▼

Description: 30 of 200

More funding changes required.

Save

### 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.

Change Package Comments/History (Click to collapse)						
Date ▼	MadeBy	Information	Step	Result	Comment	
1/16/2020 1:29 PM	Mark Wolfe	Commented				[Remove]
1/10/2020 9:11 AM	Mark Wolfe	Change Package	IN REVIEW	RESUBMITTED	Funding changes required.	[Remove]
<b>Responses</b>						
1/16/2020 1:27 PM	Response to package submission. by Mark Wolfe					[Show Documents] [Edit] [Upload Document] [Remove]
<a href="#">[Add Response to Journal Entry]</a>						
1/9/2020 3:14 PM	Mark Wolfe	Review Notes	SCHEDULE APPROVAL	RESTARTED	dfgsdf	
1/9/2020 2:28 PM	Mark Wolfe	Change Package	IN REVIEW	SUBMITTED		
1/9/2020 2:28 PM	Mark Wolfe	Change Package	DRAFT	CREATED		
<a href="#">[Add Comment]</a>						

### 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.

Change Package Comments/History (Click to collapse)						
Date	MadeBy	Information	Step	Result	Comment	
1/16/2020 1:29 PM	Mark Wolfe	Commented			Funding changes required.	[Remove]
1/10/2020 9:11 AM	Mark Wolfe	Change Package	IN REVIEW	RESUBMITTED		
<b>Responses</b>						
1/16/2020 1:27 PM	Response to package submission. by Mark Wolfe					[Show Documents] [Edit] [Upload Document] [Remove]
[Add Response to Journal Entry]						
1/9/2020 3:14 PM	Mark Wolfe	Review Notes	SCHEDULE APPROVAL	RESTARTED	dfgsdf	
1/9/2020 2:28 PM	Mark Wolfe	Change Package	IN REVIEW	SUBMITTED		
1/9/2020 2:28 PM	Mark Wolfe	Change Package	DRAFT	CREATED		

[Add Comment]

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

**Edit Response to Comment**

Comment:  31 of 2048

### Adding Documents to a Response

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

- 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.

Change Package Comments/History (Click to collapse)						
Date	MadeBy	Information	Step	Result	Comment	
1/16/2020 1:29 PM	Mark Wolfe	Commented			Funding changes required.	[Remove]
1/10/2020 9:11 AM	Mark Wolfe	Change Package	IN REVIEW	RESUBMITTED		
<b>Responses</b>						
1/16/2020 1:27 PM	Response to package submission. by Mark Wolfe					[Show Documents] [Edit] [Upload Document] [Remove]
[Add Response to Journal Entry]						
1/9/2020 3:14 PM	Mark Wolfe	Review Notes	SCHEDULE APPROVAL	RESTARTED	dfgsdf	
1/9/2020 2:28 PM	Mark Wolfe	Change Package	IN REVIEW	SUBMITTED		
1/9/2020 2:28 PM	Mark Wolfe	Change Package	DRAFT	CREATED		

[Add Comment]

- 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.

**Upload Change Request Document**

**File:**

Funding Changes.docx

**File Type:**

**Description:**  16 of 200

### 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.


**Change Package Comments/History** (Click to collapse)

Date	MadeBy	Information	Step	Result	Comment	
1/16/2020 1:29 PM	Mark Wolfe	Commented			Funding changes required.	<a href="#">[Remove]</a>
1/10/2020 9:11 AM	Mark Wolfe	Change Package	IN REVIEW	RESUBMITTED		
<b>Responses</b>						
1/16/2020 1:27 PM	Response to package submission. by Mark Wolfe					<a href="#">[Show Documents]</a> <a href="#">[Edit]</a> <a href="#">[Upload Document]</a> <a href="#">[Remove]</a>
<a href="#">[Add Response to Journal Entry]</a>						
1/9/2020 3:14 PM	Mark Wolfe	Review Notes	SCHEDULE APPROVAL	RESTARTED	dfgsdf	
1/9/2020 2:28 PM	Mark Wolfe	Change Package	IN REVIEW	SUBMITTED		
1/9/2020 2:28 PM	Mark Wolfe	Change Package	DRAFT	CREATED		

[\[Add Comment\]](#)

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

**Message from webpage**

 Are you sure you want to delete this item?