# District Administrators – Managing PSEE Change Request Workflows

Note: It is recommended that the Change Request Workflow be established with the default assignees that will be responsible for the review of specific Change Requests prior to any Change Requests being created. If there is no eligible Workflow for selection when a Change Request is added, there will be no default list of Reviewer Assignments made and Assignments will have to be added individually within the Change Request.

District Administrators have the access to manage Workflows within their District that will be used by Change Requests.
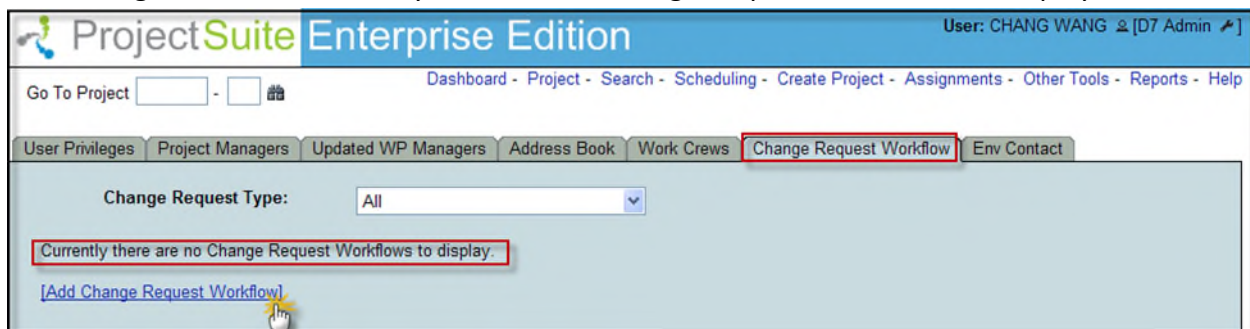
1. Select the Wrench icon for **Admin** beside your name in the banner area.
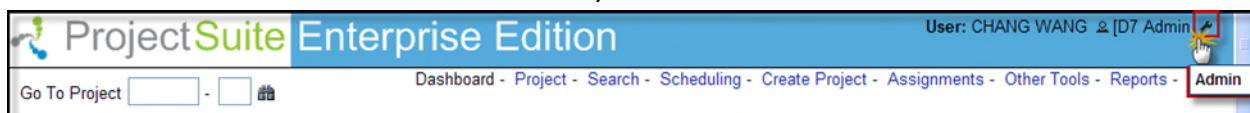
2. You will be taken to the Administration section. By default you are taken to the **User Privileges** tab.
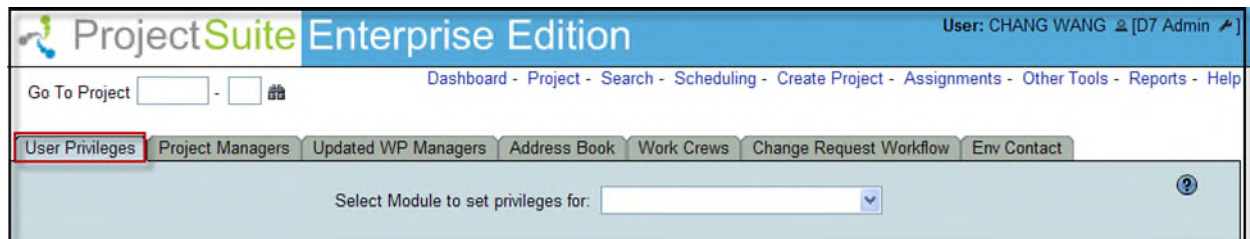
3. Click on the **Change Request Workflow** tab. If there are no Change Request Workflows, the message shown is "Currently there are no Change Request Workflows to display."

4. Click on the **Add Change Request Workflow** hyperlink. The **Add Change Request Workflow** box will open.

- Enter a unique and descriptive name for the **Name** of Workflow that is recognizable.
- Select the **Change Request Type** from the dropdown. The Workflow is associated to a specific Change Request Type.

- **For Users** is an optional field. Begin entering the last name of the person and select the person's name from the list to be added. You may repeat this step to add additional person to the For Users list.

Note: The **For Users** field can be used by the District Administrator to identify who asked for this Workflow Group or who will be using it. The staff identified here have not been added as Reviewers in the Workflow.

5. Click on Save.

6. Click on the **Add Reviewer** hyperlink to add the appropriate people to the selected Workflow.

7. The **Add Reviewer to Workflow** box will open. Begin entering the last name of the person and select the person's name from the list.

8. Click on Save.

9. There will now be a plus ⊞ sign displayed next to the named Workflow representing that it can be expanded. Click on the ⊞ to view the people that have been added to the Workflow. Click on the minus ⊟ sign to collapse the Workflow.

10. Repeat step 6 through step 8 to add additional Assignees to the Workflow.

11. Repeat step 4 through step 10 to add additional Workflow. Each Change Request Type can have multiple Workflows created, but each Workflow must be given a unique name.
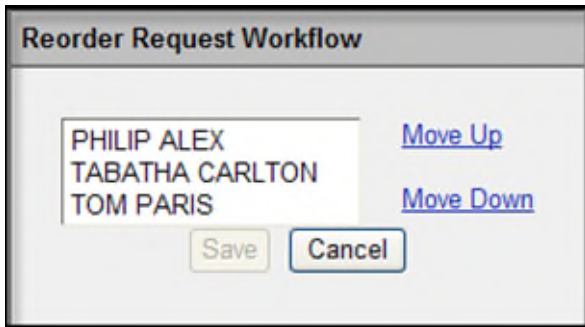

Reordering of Reviewers

The order that assignees are listed within the Workflow will be the order maintained when the Workflow is chosen for a new Change Request. The names within an Workflow can be reordered.

1. Click on the **Reorder** hyperlink beside the Workflow to be reordered. The **Reorder Request Workflow** box opens.
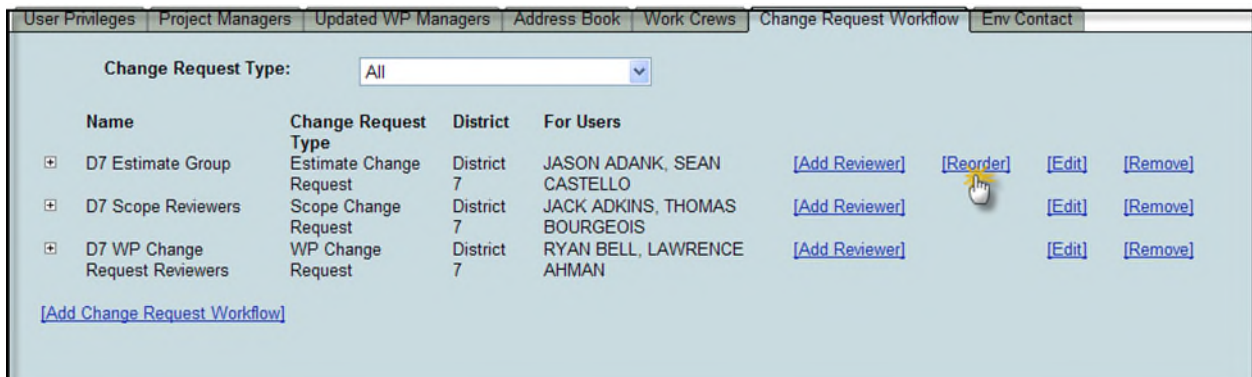
2. Select a name and click on Move Up or Move Down to reorder.
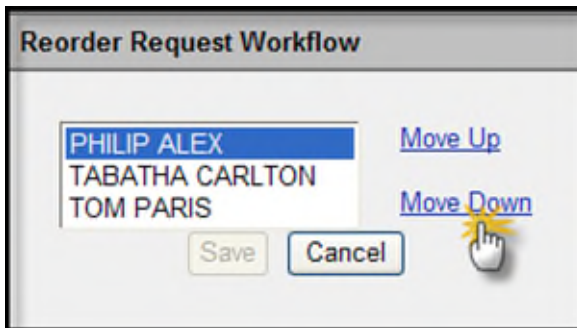
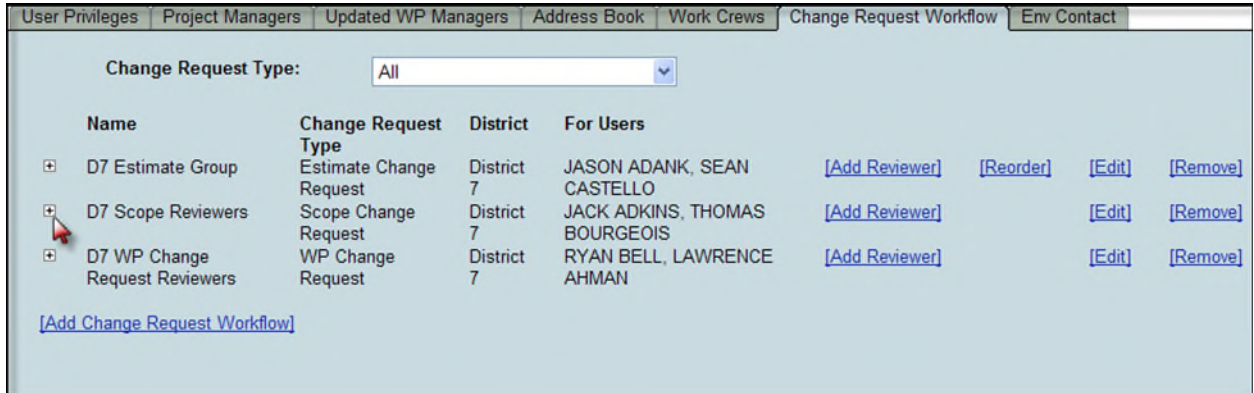3. When the desired order of the names is reached, click on Save.
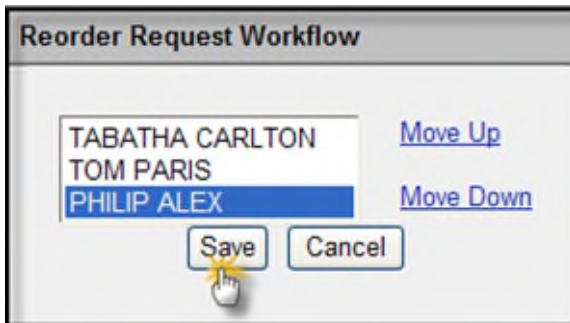
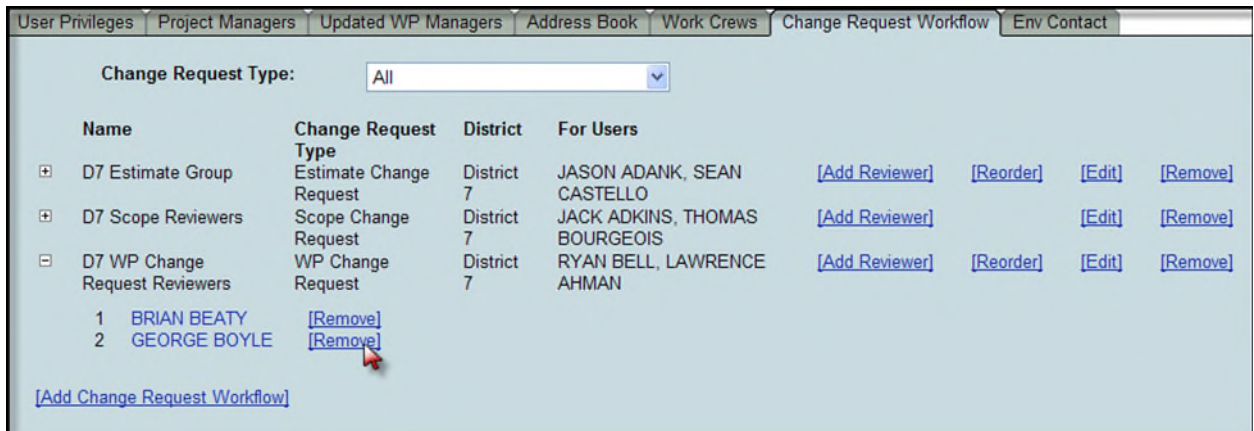4. The Workflow can be expanded to confirm the new order of the Assignees.

Removing Assignees

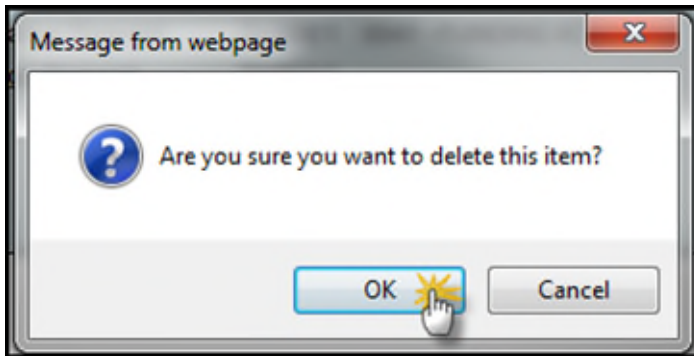You may remove Assignees from an existing Workflow List.

1. Click on the plus ⊞ sign displayed next to the named Workflow to expand.

2. Click on the Remove hyperlink beside the name of Assignee to be removed from the Workflow.

3. Click OK to confirm the removal of the Assignee.

4. The Assignee is removed.

Edit of Workflow

The name of Workflow, Change Request Type and For Users can be edited.

1. Click on the Edit hyperlink beside the Workflow to be edited.

2. Make changes to the name of the Workflow.
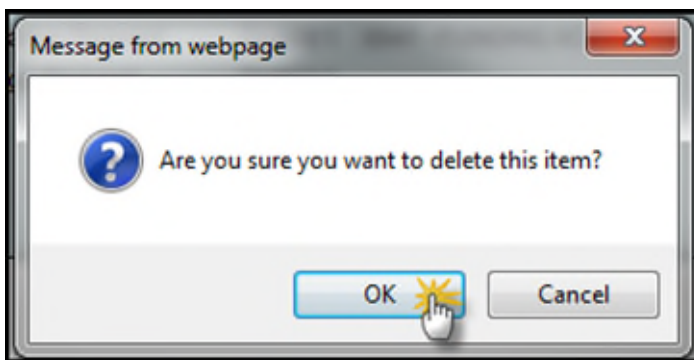
3. The name is changed.
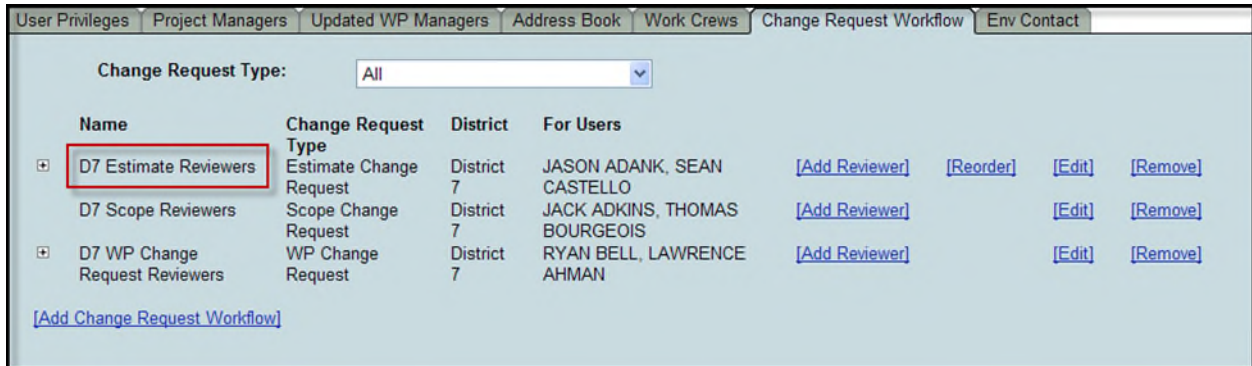
Removal of Assignment List

A Workflow can be removed.

1. Click on the Remove hyperlink beside the Workflow to be removed.

2. Click OK to confirm removal of the Workflow.

3. The Workflow is removed along with all the associated Assignees.

Filtering of Workflow List

Workflow can be filtered to display only those with a specific Change Request Type.

1. Click on the Change Request Type drop down and select a Change Request Type.
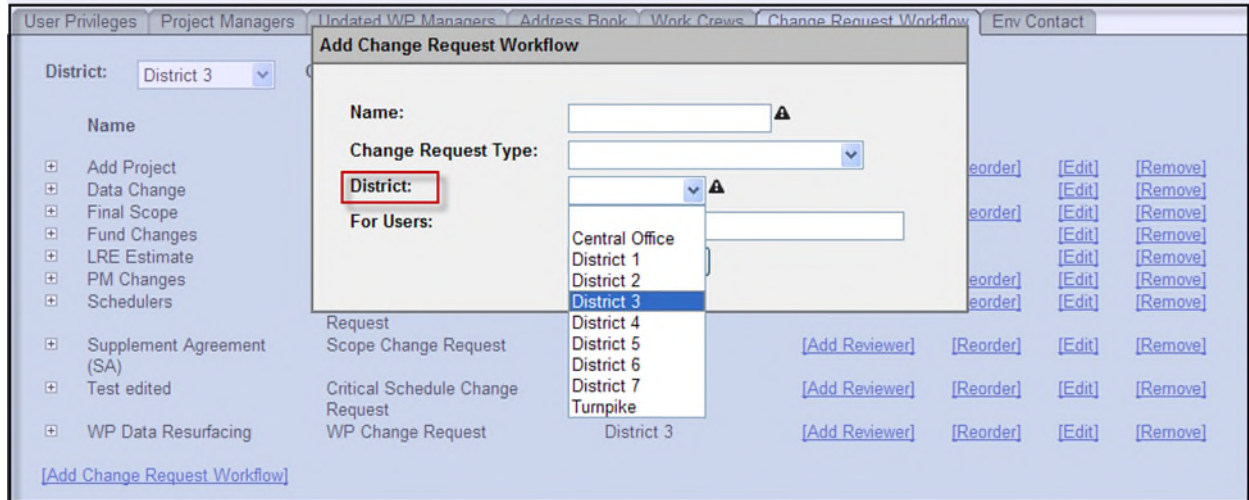

2. Workflow displays for only the selected Change Request Type.

Statewide Administrators

Statewide Administrators have the access to manage Workflow within any District. The only difference that a Statewide Administrator will see is that they must select District when the Workflow is being established.

Since the Statewide Administrator has access to all Districts, the default view of Change Request Workflow is of all Districts. A single District can be selected to view only the Change

Request Workflow for a single District filtering out the other Districts' information from the display.