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.

💐 ProjectSuite	Enterprise Edition	User: CHANG WANG 🚊 [D7 Admin	
Go To Project #	Dashboard - Project - Search - S	Scheduling - Create Project - Assignments - Other Tools - Reports - Admin	

2. You will be taken to the Administration section. By default you are taken to the **User Privileges** tab.

2 Project Suite	Enterprise Edition	User: CHANG W/	ANG 🚨 [D7 Admin 🎤]
Go To Project 🔄 - 🛛 📸	Dashboard - Project - Search	- Scheduling - Create Project - Assignments - Other T	ools - Reports - Help
User Privileges Project Managers	Updated WP Managers Address Book W	ork Crews Change Request Workflow Env Contact	
	Select Module to set privileges for:	×	()

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."

2 ProjectSuite	Enterprise	Edition		Use	er: CHANG WANG ≗[D7 Admin ≁]
Go To Project - 📸	Dashboa	rd - Project - Sea	arch - Scheduli	ng - Create Project - Assignm	nents - Other Tools - Reports - Help
User Privileges Project Managers	Updated WP Managers	Address Book	Work Crews	Change Request Workflow	Env Contact
Change Request Type:	All		~		
Currently there are no Change Req	uest Workflows to display.	3			
[Add Change Request Workflow]					

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.

Name:	D7 Estimate Group
Change Request Type:	Estimate Change Request
For Users:	Critical Schedule Change Request
	Estimate Change Request
	New Work Program Request Schedule Change Request
	Scope Change Request WP Change Request WP Phase 52 Change Request

• 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.

dd Change Request Workfl	ow	
Name:	D7 Estimate Group	
Change Request Type:	Estimate Change Request	
For Users:	sea Enter User Name	
	BABER, SEAN (KN818SB)	~
	BARBEAU, SEAN (OAUSFSB)	
	BOISSEAU, CRAIG (KNCARCB)	
	BROUSSEAU, EDGAR (SU124EB)	_
	CARMAN, SEAN (RT219SP)	
	CASTELLO, SEAN (KNGLACS)	
	CAUSSEAUX, AM("FM938AC)	

est 💌
GLACS) [Remove]
42DA)
AIN (KNUOFGA)
JA)
49DA)
(ITMA)
84

5. Click on Save.

Add Change Request Workfl	low	
Name:	D7 Estimate Group	
Change Request Type:	Estimate Change Request	
For Users:	CASTELLO, SEAN (KNGLACS) [Remove] ADANK, JASON (FI989JA) [Remove]	
	Save Cancel	

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

User F	Privileges Pri	oject Managers	Updated WP Man	agers Addr	ress Book Work Crews	Change Request Workflow	Env Contact	
		Request Type:	All		~			
Ŧ	Name D7 Estimate Group		e Request Type ite Change st	District District 7	For Users JASON ADANK, SEAN CASTELLO	[Add Reviewer] [<u>Edit]</u>	[Remove]
[Add	I Change Requ	uest 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.

Add Reviewer to Workflow							
Reviewer:	Phil ALEX, PHILIP (CEnter User Name) FLETCHER, Physic (MT 799PF) PHILLIPS, RODNEY (OAHILRP)	[Show all users]					

8. Click on Save.

Add Reviewer to Workflow							
Reviewer:	ALEX, PHILIP (CN706PA)	[Show all users]					
	13						

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.

User Priv	ileges Project Managers	Updated WP Mana	gers Addr	ress Book Work Crews C	hange Request Work	low Env Co	ontact	
District: District 7 Change Request Type:				All	~			
1	Name	Change Request Type	District	For Users				
	07 Estimate Reviewers	Estimate Change Request	District 7	JASON ADANK, SEAN CASTELLO	[Add Reviewer]	[Reorder]	[Edit]	[Remove]
	D7 WP Change Request Reviewers	WP Change Request	District 7	RYAN BELL, LAWRENCE AHMAN	[Add Reviewer]		[Edit]	[Remove]
[Add C	hange Request Workflow]							

Į	User Pr	rivileges Project Ma	anagers Updated WP Man	agers Addr	ess Book Work Crews	Change Request Workflow En	/ Contact	
		Change Request	t Type: All		~			
		Name D7 Estimate Group	Change Request Type Estimate Change Request	District District 7	For Users JASON ADANK, SEAN CASTELLO	[Add Reviewer]	[Edit]	[Remove]
	[Add	1 PHILIP ALE						

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

U	ser Pi	rivileg	es Project M	lanagers Upda	ated WP Manager	s Address Book	Work Crews	Change Request Work	kflow Env C	ontact	
		C	hange Reque	st Type:	All		•				
		Nam	ie	Change Requ Type	iest Distric	t For Users					
		D7 E Grou	stimate Ip	Estimate Chan Request	nge District 7	JASON ADA CASTELLO	NK, SEAN	[Add Reviewer]	[Reorder]	[Edit]	[Remove]
		1 2	PHILIP ALEX TABATHA CARLTON	[Rem [Rem							
		3	TOM PARIS	[Rem	iove]						
	[Add	Chan	<u>ge Request W</u>	orkflowj							

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.

Name	Change Request Type	District	For Users				
D7 Estimate Group	Estimate Change Request	District 7	JASON ADANK, SEAN CASTELLO	[Add Reviewer]	[Reorder]	[Edit]	[Remove]
D7 Scope Reviewers	Scope Change Request	District 7	JACK ADKINS, THOMAS BOURGEOIS	[Add Reviewer]		[Edit]	[Remove]
D7 WP Change Request Reviewers	WP Change Request	District 7	RYAN BELL, LAWRENCE AHMAN	[Add Reviewer]		[Edit]	[Remove]

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.

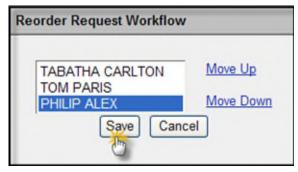
	Change Request Ty	pe: All		*				
	Name	Change Request Type	District	For Users				
]	D7 Estimate Group	Estimate Change Request	District 7	JASON ADANK, SEAN CASTELLO	[Add Reviewer]	[Reorder]	[Edit]	[Remove]
]	D7 Scope Reviewers	Scope Change Request	District 7	JACK ADKINS, THOMAS BOURGEOIS	[Add Reviewer]	0	[Edit]	[Remove]
]	D7 WP Change Request Reviewers	WP Change Request	District 7	RYAN BELL, LAWRENCE AHMAN	[Add Reviewer]		[Edit]	[Remove]
dd	Change Request Workflo	wl						

Reorder Request Workflow	1
PHILIP ALEX TABATHA CARLTON TOM PARIS	Move Up Move Down
Save	cel

2. Select a name and click on Move Up or Move Down to reorder.

Reorder Request Workflow	/
PHILIP ALEX	Move Up
TABATHA CARLTON TOM PARIS	Move Down
Save	cel 🖑

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.

User	r Privileges	Project Managers	S Updated WP Ma	nagers A	Address Book	Work Crews	Change Request Workflo	W Env Contac	t
	Char	nge Request Type	All			•			
	Name		Change Request Type	District	For Users				
=	D7 Esti	imate Group	Estimate Change Request	District 7	JASON ADA CASTELLO	NK, SEAN	[Add Reviewer]	[Reorder] [E	dit] [Remove]
		ABATHA ARLTON	[Remove]						
		OM PARIS HILIP ALEX	[Remove] [Remove]						

Removing Assignees

You may remove Assignees from an existing Workflow List.

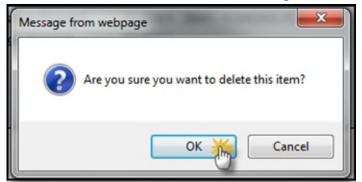
1. Click on the plus 📧 sign displayed next to the named Workflow to expand.

	Name	Change Request Type	District	For Users				
ŧ	D7 Estimate Group	Estimate Change Request	District 7	JASON ADANK, SEAN CASTELLO	[Add Reviewer]	[Reorder]	[Edit]	[Rem
•	D7 Scope Reviewers	Scope Change Request	District 7	JACK ADKINS, THOMAS BOURGEOIS	[Add Reviewer]		[Edit]	[Rem
÷	D7 WP Change Request Reviewers	WP Change Request	District 7	RYAN BELL, LAWRENCE AHMAN	[Add Reviewer]		[Edit]	[Rem

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

User P	rivileges TProject Manager		nagers A	ddress Book Work Crews	Change Request Work	flow Env C	ontact	
	Change Request Type	All		*				
	Name	Change Request Type	District	For Users				
÷	D7 Estimate Group	Estimate Change Request	District 7	JASON ADANK, SEAN CASTELLO	[Add Reviewer]	[Reorder]	[Edit]	[Remove]
+	D7 Scope Reviewers	Scope Change Request	District 7	JACK ADKINS, THOMAS BOURGEOIS	[Add Reviewer]		[Edit]	[Remove]
Ξ	D7 WP Change Request Reviewers	WP Change Request	District 7	RYAN BELL, LAWRENCE AHMAN	[Add Reviewer]	[Reorder]	[Edit]	[Remove]
	1 BRIAN BEATY 2 GEORGE BOYLE	[Remove] [Remove]						
[Add	Change Request Workflow	1						

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



4. The Assignee is removed.

	Change Request Typ	All		*				
	Name	Change Request	District	For Users				
	D7 Estimate Group	Estimate Change Request	District 7	JASON ADANK, SEAN CASTELLO	[Add Reviewer]	[Reorder]	[Edit]	[Remove]
	D7 Scope Reviewers	Scope Change Request	District 7	JACK ADKINS, THOMAS BOURGEOIS	[Add Reviewer]		[Edit]	[Remove]
Ξ	D7 WP Change Request Reviewers	WP Change Request	District 7	RYAN BELL, LAWRENCE AHMAN	[Add Reviewer]	[Reorder]	[Edit]	[Remove]
	1 BRIAN BEATY	[Remove]						

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.

	Change Request Ty	pe: All		~				
	Name	Change Request Type	District	For Users				
•	D7 Estimate Group	Estimate Change Request	District 7	JASON ADANK, SEAN CASTELLO	[Add Reviewer]	[Reorder]	[Edit]	[Remove]
	D7 Scope Reviewers	Scope Change Request	District 7	JACK ADKINS, THOMAS BOURGEOIS	[Add Reviewer]		[Edit]	[Remove]
•	D7 WP Change Request Reviewers	WP Change Request	District 7	RYAN BELL, LAWRENCE AHMAN	[Add Reviewer]		[Edit]	[Remove]

2. Make changes to the name of the Workflow.

lame:	D7 Estimate Reviewers	
Change Request Type:	Estimate Change Request	-
istrict:	District 7	
or Users:	JASON ADANK [Remove] SEAN CASTELLO [Remove]	
	Save Cancel	

3. The name is changed.

	Change Request Type	e: All		~				
	Name	Change Request Type	District	For Users				
÷	D7 Estimate Reviewers	Estimate Change Request	District 7	JASON ADANK, SEAN CASTELLO	[Add Reviewer]	[Reorder]	[Edit]	[Remove]
	D7 Scope Reviewers	Scope Change Request	District 7	JACK ADKINS, THOMAS BOURGEOIS	[Add Reviewer]		[Edit]	[Remove]
Đ	D7 WP Change Request Reviewers	WP Change Request	District 7	RYAN BELL, LAWRENCE AHMAN	[Add Reviewer]		[Edit]	[Remove]

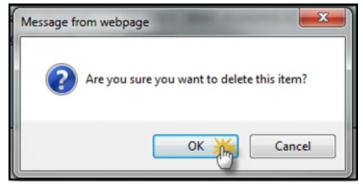
Removal of Assignment List

A Workflow can be removed.

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

	Change Request Typ	All		*				
	Name	Change Request Type	District	For Users				
÷	D7 Estimate Reviewers	Estimate Change Request	District 7	JASON ADANK, SEAN CASTELLO	[Add Reviewer]	[Reorder]	[Edit]	[Remove]
	D7 Scope Reviewers	Scope Change Request	District 7	JACK ADKINS, THOMAS BOURGEOIS	[Add Reviewer]		[Edit]	[Remove]
+	D7 WP Change Request Reviewers	WP Change Request	District 7	RYAN BELL, LAWRENCE AHMAN	[Add Reviewer]		[Edit]	[Remove]

2. Click OK to confirm removal of the Workflow.



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

User F	Privileges Proje	ct Managers	Updated WP Man	agers Add	dress Book Work Crews C	hange Request Work	cflow Env C	ontact	
	Change Ree	quest Type:	All		~				
	Name		Change Request Type	District	For Users				
+	D7 Estimate R	eviewers	Estimate Change Request	District 7	JASON ADANK, SEAN CASTELLO	[Add Reviewer]	[Reorder]	[Edit]	[Remove]
ŧ	D7 WP Change Reviewers		WP Change Request	District 7	RYAN BELL, LAWRENCE AHMAN	[Add Reviewer]		[Edit]	[Remove]
[Add	d Change Reques	st Workflow]							

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.

User P	rivileges	Project Managers	Updat	ed WP Managers	Address Book	Work Crews	Change Request Work	kflow Env C	ontact	
	Chan	ge Request Type:		All		*				
	Name		Change	Critical Schedule (
Ŧ	D7 Estin	nate Reviewers	Estimat	Estimate Change New Work Program Schedule Change	n Request 🖑	NK, SEAN	[Add Reviewer]	[Reorder]	[Edit]	[Remove]
Ŧ	D7 WP (Reviewer	Change Request rs	WP Cha Request	Scope Change Re WP Change Requ WP Phase 52 Cha	quest est	, LAWRENCE	[Add Reviewer]		[Edit]	[Remove]
[Add	Change F	Request Workflow]			ingo request					

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

User F	Privileges	Project Managers	Updated WP N	/lanagers	Address Book	Work Crews	Change Request Work	flow	Env Contact	
	Chan	ge Request Type:	Estimat	e Change R	lequest	*				
	Name	Chan Type	ge Request	District	For Users					
Đ	D7 Estir Reviewe	nate Estim	ate Change est	District 7	JASON ADAI CASTELLO	NK, SEAN	[Add Reviewer]	[Reon	der] [Edi	t] [Remove]
[Add	I Change I	Request Workflow]								

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.

User P	Privileges Project Managers	Undated WP Managers Addr	ess Book Work C	rews I Change Request Work	flow Env C	ontact	
		Add Change Request Workfl	ow				
Dist	trict: District 3 💌	d					
	Name	Name: Change Request Type:		A			
+	Add Project	Dista			eorder]	[Edit]	[Remove]
+	Data Change	District:	×	A		[Edit]	[Remove]
+	Final Scope Fund Changes	For Users:			eorder]	[Edit]	[Remove]
+	LRE Estimate		Central Office District 1			[Edit] [Edit]	[Remove] [Remove]
±	PM Changes		District 2		eorder]	[Edit]	[Remove]
Đ	Schedulers		District 3		eorder]	[Edit]	[Remove]
		Request	District 4				
±	Supplement Agreement	Scope Change Request	District 5	[Add Reviewer]	[Reorder]	[Edit]	[Remove]
	(SA)		District 6				-
÷	Test edited	Critical Schedule Change	District 7 Turnpike	[Add Reviewer]	[Reorder]	[Edit]	[Remove]
÷	WP Data Resurfacing	Request WP Change Request	District 3	[Add Reviewer]	[Reorder]	[Edit]	[Remove]
[Add	I Change Request Workflow]						

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.

er Pi	ivileges	Project Manage	ers Updated WP Man	agers Addr	ess Book Work Crews C	hange Request Worl	kflow Env C	ontact	
Dist	ict:	ALL 💌	Change Request Type:		All	*			
		ALL							
		Central Office	Change Request	District	For Users				
_		District 1	Туре			and the second second			
+		District 2	New Work Program	District 1		[Add Reviewer]		[Edit]	[Remove]
		District 3 🎇	Request						
ŧ		District 4	New Work Program	District 3		[Add Reviewer]	[Reorder]	[Edit]	[Remove]
		District 5	Request						
Ŧ	Critica	District 6	Critical Schedule	District 4		[Add Reviewer]	[Reorder]	[Edit]	[Remove]
		District 7	Change Request						
Ŧ	CSCR	Turnpike	Critical Schedule	District 1		[Add Reviewer]	[Reorder]	[Edit]	[Remove]
			Change Request						
Ŧ	D1 Nev	v Roads	Estimate Change	District 1	APRIL BLACKBURN, JT	[Add Reviewer]	[Reorder]	[Edit]	[Remove]
			Request		EHRHARDT				
٠	D1x		Estimate Change	District 1	STEPHANIE TANNER	[Add Reviewer]	[Reorder]	[Edit]	[Remove]
			Request			Contraction of the local division of the loc			

Dist	rict: District 3	Change Request Type: AI	1		×			
	Name	Change Request Type	District	For Users				
+	Add Project	New Work Program Request	District 3		[Add Reviewer]	[Reorder]	[Edit]	[Remove
+	Data Change	WP Change Request	District 3		[Add Reviewer]		[Edit]	[Remove
٠	Final Scope	Scope Change Request	District 3		[Add Reviewer]	[Reorder]	[Edit]	[Remove
+	Fund Changes	WP Phase 52 Change Request	District 3		[Add Reviewer]		[Edit]	[Remove
٠	LRE Estimate	Estimate Change Request	District 3		[Add Reviewer]		[Edit]	[Remove
+	PM Changes	WP Change Request	District 3		[Add Reviewer]	[Reorder]	[Edit]	[Remove
+	Schedulers	Critical Schedule Change Request	District 3		[Add Reviewer]	[Reorder]	[Edit]	[Remove
+	Supplement Agreement (SA)	Scope Change Request	District 3		[Add Reviewer]	[Reorder]	[Edit]	[Remove
+	Test edited	Critical Schedule Change Request	District 3		[Add Reviewer]	[Reorder]	[Edit]	[Remove
+	WP Data Resurfacing	WP Change Request	District 3		[Add Reviewer]	[Reorder]	[Edit]	[Remove