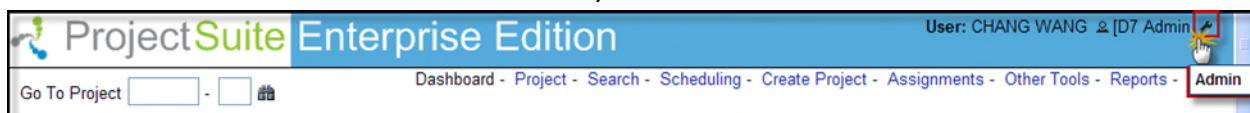


District Administrators – Managing PSEE Change Request Workflows

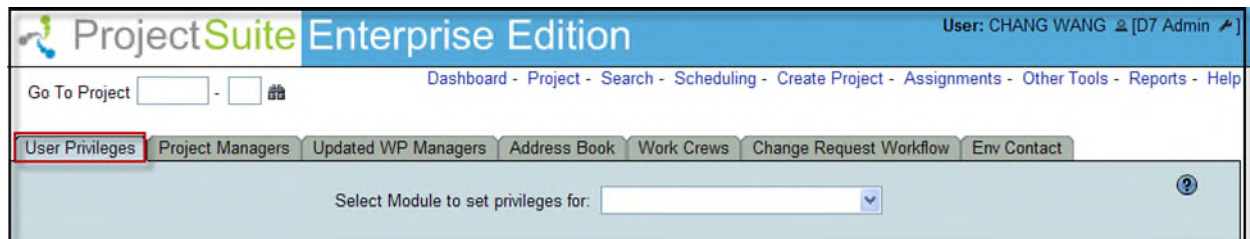
Note: It is recommended that the Change Request Workflow be established with the default assignees that will be responsible for the review of specific Change Requests prior to any Change Requests being created. If there is no eligible Workflow for selection when a Change Request is added, there will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

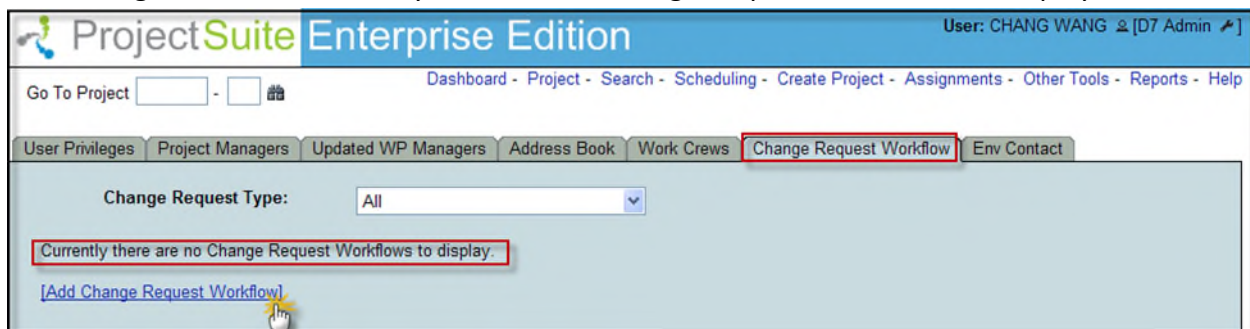
1. Select the Wrench icon for **Admin** beside your name in the banner area.



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.

The screenshot shows a form titled "Add Change Request Workflow". It has three main sections: "Name:", "Change Request Type:", and "For Users:". The "Name:" field contains the text "D7 Estimate Group". The "Change Request Type:" field is a dropdown menu currently showing "Estimate Change Request". The "For Users:" field is a dropdown menu that is open, displaying a list of options: "Critical Schedule Change Request", "Estimate Change Request" (which is highlighted in blue), "New Work Program Request", "Schedule Change Request", "Scope Change Request", "WP Change Request", and "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.

This screenshot shows the same "Add Change Request Workflow" form. The "Name:" and "Change Request Type:" fields are identical to the previous screenshot. In the "For Users:" field, the text "sea" has been entered into the input box. Below the input box, a dropdown list of user names is visible, starting with "BABER, SEAN (KN818SB)" and ending with "CAUSSEAU, AMY (FM938AC)". A mouse cursor is pointing at the bottom of the list.

Add Change Request Workflow

Name:

Change Request Type:

For Users: CASTELLO, SEAN (KNGLACS) [\[Remove\]](#)

 ADAMS, DANIEL (TP842DA)
 ADANDEDJAN, GHISLAIN (KNUOFGA)
 ADANK, JASON (FI989JA)
 ANGLIN, DANIEL (TP849DA)
 ARORA, MADAN (KNVITMA)
 BALTER, DANIEL (KNTYLDB)

5. Click on Save.

Add Change Request Workflow

Name:

Change Request Type:

For Users: CASTELLO, SEAN (KNGLACS) [\[Remove\]](#)
 ADANK, JASON (FI989JA) [\[Remove\]](#)

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

User Privileges | Project Managers | Updated WP Managers | Address Book | Work Crews | **Change Request Workflow** | Env Contact

Change Request Type:

Name	Change Request Type	District	For Users	
D7 Estimate Group	Estimate Change Request	District 7	JASON ADANK, SEAN CASTELLO	[Add Reviewer] [Edit] [Remove]

[\[Add Change Request Workflow\]](#)

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

ALEX, PHILIP (CN706PA) Enter User Name




FLETCHER, PHILIP (MT1799PF)



PHILLIPS, RODNEY (OAHILRP)


8. Click on Save.

Add Reviewer to Workflow

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

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.

User Privileges Project Managers Updated WP Managers Address Book Work Crews Change Request Workflow Env Contact						
District:	<input type="text" value="District 7"/>	Change Request Type:	<input type="text" value="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 WP Change Request Reviewers	WP Change Request	District 7	RYAN BELL, LAWRENCE AHMAN [Add Reviewer] [Edit] [Remove]			
[Add Change Request Workflow]						

User Privileges Project Managers Updated WP Managers Address Book Work Crews Change Request Workflow Env Contact													
Change Request Type:	<input type="text" value="All"/>												
Name	Change Request Type	District	For Users										
 D7 Estimate Group	Estimate Change Request	District 7	JASON ADANK, SEAN CASTELLO [Add Reviewer] [Edit] [Remove]										
<table border="1" style="width: 100%;"> <tr> <td style="width: 20px;">1</td> <td style="width: 100px;">PHILIP ALEX</td> <td>[Remove]</td> <td colspan="4"></td> </tr> </table>							1	PHILIP ALEX	[Remove]				
1	PHILIP ALEX	[Remove]											
[Add Change Request Workflow]													

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



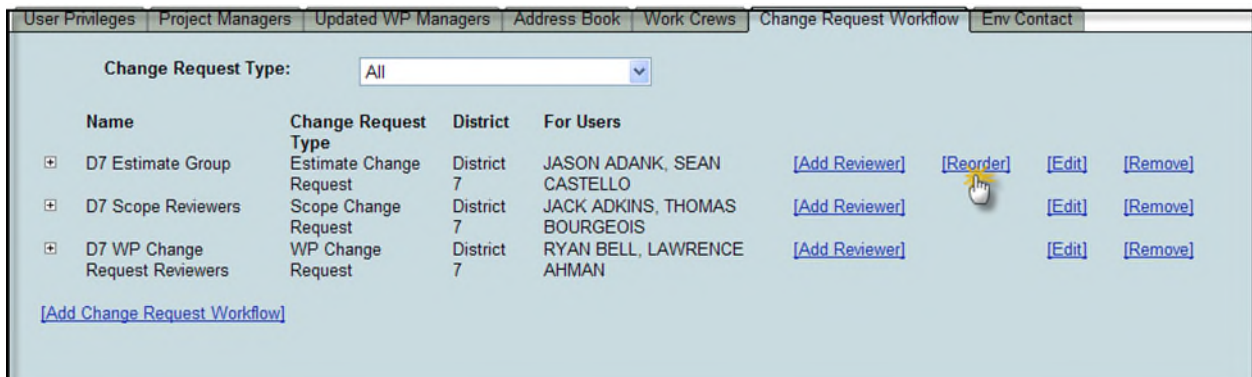
11. Repeat step 4 through step 10 to add additional Workflow. Each Change Request Type can have multiple Workflows created, but each Workflow must be given a unique name.

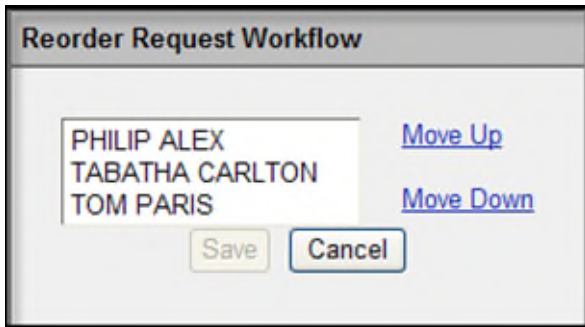


Reordering of Reviewers

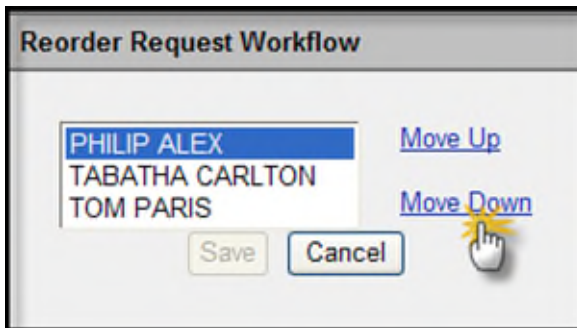
The order that assignees are listed within the Workflow will be the order maintained when the Workflow is chosen for a new Change Request. The names within an Workflow can be reordered.

1. Click on the **Reorder** hyperlink beside the Workflow to be reordered. The **Reorder Request Workflow** box opens.

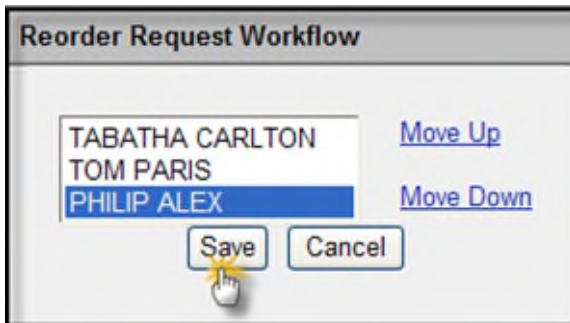




2. Select a name and click on Move Up or Move Down to reorder.



3. When the desired order of the names is reached, click on Save.




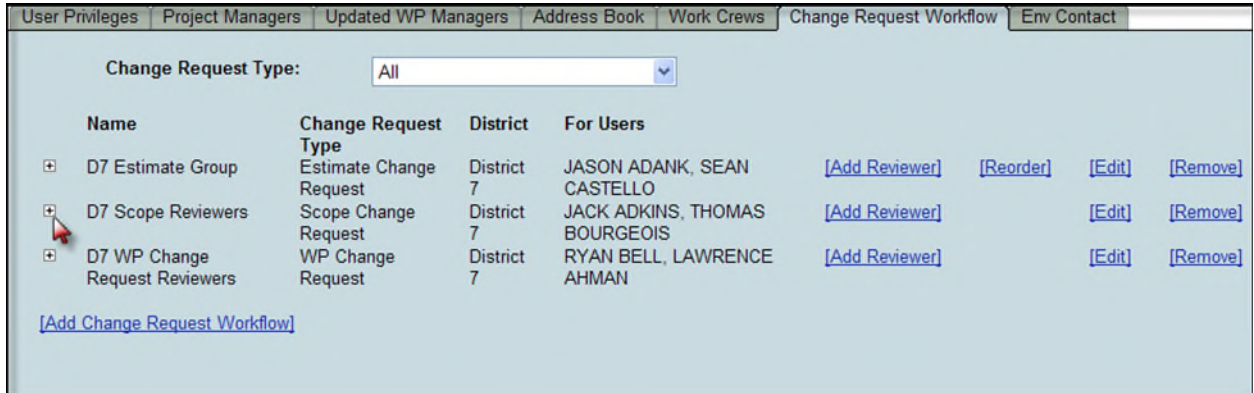
4. The Workflow can be expanded to confirm the new order of the Assignees.

User Privileges Project Managers Updated WP Managers Address Book Work Crews Change Request Workflow Env Contact						
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]
1	TABATHA CARLTON			[Remove]		
2	TOM PARIS			[Remove]		
3	PHILIP ALEX			[Remove]		

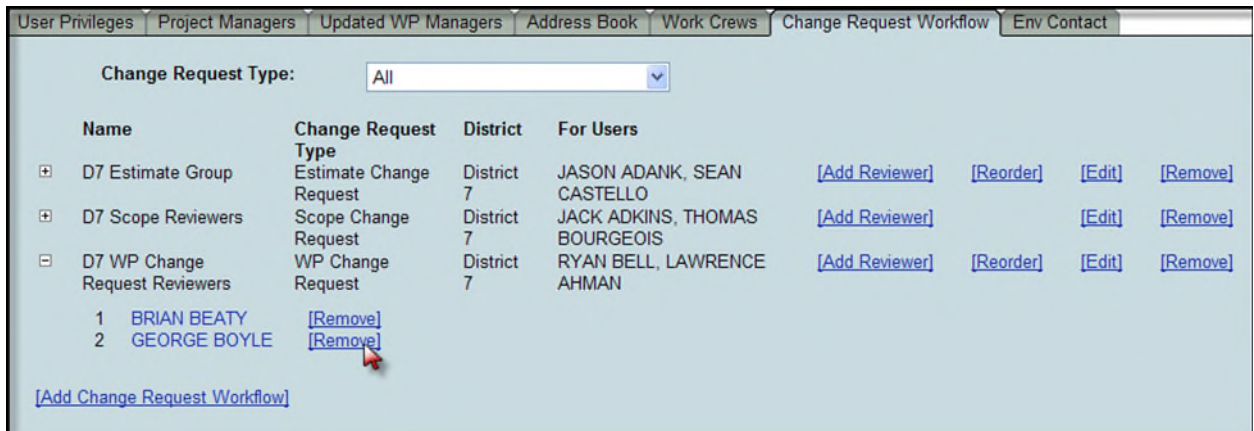
Removing Assignees

You may remove Assignees from an existing Workflow List.

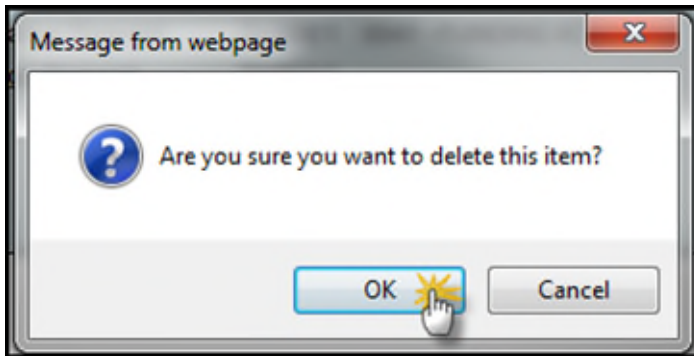
1. Click on the plus  sign displayed next to the named Workflow to expand.



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.

User Privileges Project Managers Updated WP Managers Address Book Work Crews Change Request Workflow Env Contact							
Change Request Type:		All					
Name	Change Request Type	District	For Users				
<input checked="" type="checkbox"/> D7 Estimate Group	Estimate Change Request	District 7	JASON ADANK, SEAN CASTELLO	[Add Reviewer]	[Reorder]	[Edit]	[Remove]
<input checked="" type="checkbox"/> D7 Scope Reviewers	Scope Change Request	District 7	JACK ADKINS, THOMAS BOURGEOIS	[Add Reviewer]		[Edit]	[Remove]
<input checked="" type="checkbox"/> D7 WP Change Request Reviewers	WP Change Request	District 7	RYAN BELL, LAWRENCE AHMAN	[Add Reviewer]	[Reorder]	[Edit]	[Remove]
1	BRIAN BEATY					[Remove]	
[Add Change Request Workflow]							

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.

User Privileges Project Managers Updated WP Managers Address Book Work Crews Change Request Workflow Env Contact							
Change Request Type:		All					
Name	Change Request Type	District	For Users				
<input checked="" type="checkbox"/> D7 Estimate Group	Estimate Change Request	District 7	JASON ADANK, SEAN CASTELLO	[Add Reviewer]	[Reorder]	[Edit]	[Remove]
<input checked="" type="checkbox"/> D7 Scope Reviewers	Scope Change Request	District 7	JACK ADKINS, THOMAS BOURGEOIS	[Add Reviewer]		[Edit]	[Remove]
<input checked="" type="checkbox"/> D7 WP Change Request Reviewers	WP Change Request	District 7	RYAN BELL, LAWRENCE AHMAN	[Add Reviewer]		[Edit]	[Remove]
[Add Change Request Workflow]							

2. Make changes to the name of the Workflow.

Edit Change Request Workflow

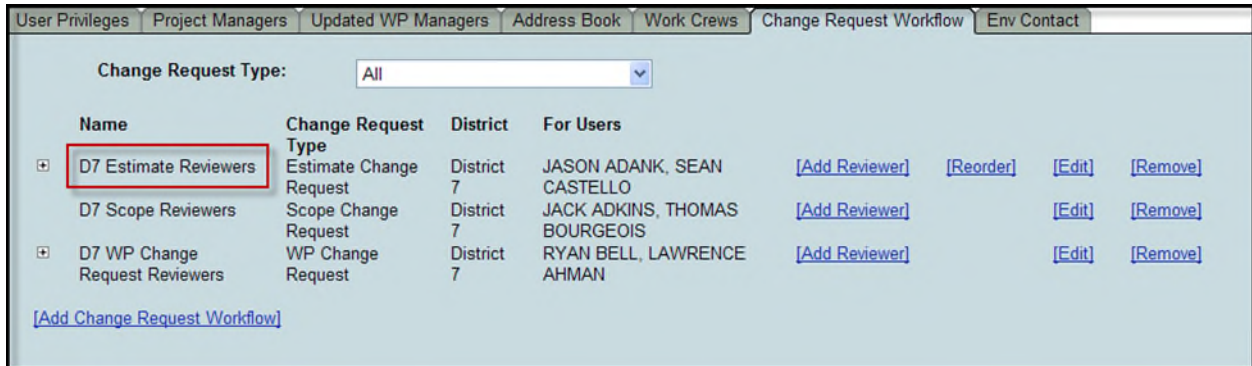
Name:

Change Request Type:

District:

For Users: JASON ADANK [\[Remove\]](#)
SEAN CASTELLO [\[Remove\]](#)

3. The name is changed.



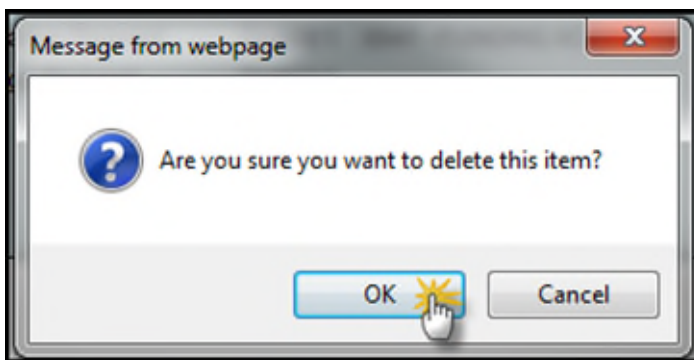
Removal of Assignment List

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.

User Privileges		Project Managers		Updated WP Managers		Address Book		Work Crews		Change Request Workflow		Env Contact	
Change Request Type: <input type="text" value="All"/>													
Name	Change Request Type	District	For Users										
<input type="checkbox"/> D7 Estimate Reviewers	Estimate Change Request	District 7	JASON ADANK, SEAN CASTELLO		[Add Reviewer]	[Reorder]	[Edit]	[Remove]					
<input type="checkbox"/> D7 WP Change Request Reviewers	WP Change Request	District 7	RYAN BELL, LAWRENCE AHMAN		[Add Reviewer]		[Edit]	[Remove]					
[Add Change Request 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.

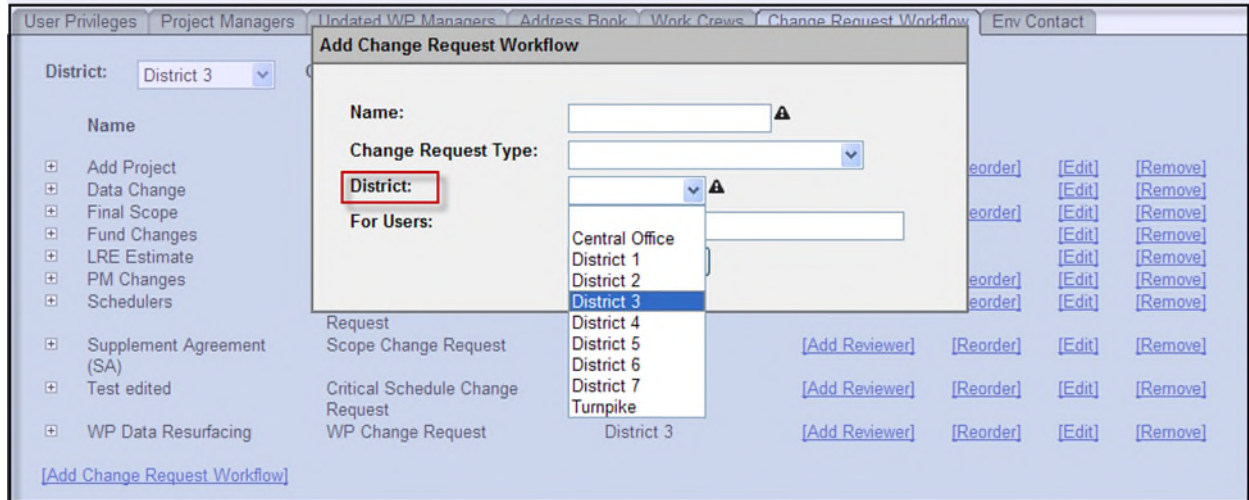
User Privileges		Project Managers		Updated WP Managers		Address Book		Work Crews		Change Request Workflow		Env Contact	
Change Request Type: <input type="text" value="All"/>													
Name	Change Request Type	District	For Users										
<input type="checkbox"/> D7 Estimate Reviewers	Estimate Change Request	District 7	JASON ADANK, SEAN CASTELLO		[Add Reviewer]	[Reorder]	[Edit]	[Remove]					
<input type="checkbox"/> D7 WP Change Request Reviewers	WP Change Request	District 7	RYAN BELL, LAWRENCE AHMAN		[Add Reviewer]		[Edit]	[Remove]					
[Add Change Request Workflow]													

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

User Privileges		Project Managers		Updated WP Managers		Address Book		Work Crews		Change Request Workflow		Env Contact	
Change Request Type: <input type="text" value="Estimate Change Request"/>													
Name	Change Request Type	District	For Users										
<input type="checkbox"/> D7 Estimate Reviewers	Estimate Change Request	District 7	JASON ADANK, SEAN CASTELLO		[Add Reviewer]	[Reorder]	[Edit]	[Remove]					
[Add Change 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.



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.

User Privileges | Project Managers | Updated WP Managers | Address Book | Work Crews | **Change Request Workflow** | Env Contact

District: ALL Change Request Type: All

Name	Change Request Type	District	For Users				
⊕ A2	New Work Program Request	District 1		[Add Reviewer]	[Edit]	[Remove]	
⊕ Add P	New Work Program Request	District 3		[Add Reviewer]	[Reorder]	[Edit]	[Remove]
⊕ Critica	Critical Schedule Change Request	District 4		[Add Reviewer]	[Reorder]	[Edit]	[Remove]
⊕ CSCR	Critical Schedule Change Request	District 1		[Add Reviewer]	[Reorder]	[Edit]	[Remove]
⊕ D1 New Roads	Estimate Change Request	District 1	APRIL BLACKBURN, JT EHRHARDT	[Add Reviewer]	[Reorder]	[Edit]	[Remove]
⊕ D1x	Estimate Change Request	District 1	STEPHANIE TANNER	[Add Reviewer]	[Reorder]	[Edit]	[Remove]

User Privileges | Project Managers | Updated WP Managers | Address Book | Work Crews | **Change Request Workflow** | Env Contact

District: District 3 Change Request Type: All

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]	[Reorder]	[Edit]	[Remove]
⊕ Final Scope	Scope Change Request	District 3		[Add Reviewer]	[Reorder]	[Edit]	[Remove]
⊕ Fund Changes	WP Phase 52 Change Request	District 3		[Add Reviewer]	[Reorder]	[Edit]	[Remove]
⊕ LRE Estimate	Estimate Change Request	District 3		[Add Reviewer]	[Reorder]	[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]

[\[Add Change Request Workflow\]](#)