

The Estimate Change Request Module

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Requesting Privileges in the Estimate Change Request Module

As a PSEE User, you may request access/privilege to a specific activity within the Estimate Change Request 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 Estimate Change Request module. Place a check in the box beside the activity access/privilege being requested in the column appropriate for your District. Select the Request button to send the request to the District Administrator for action.

Request Privileges		D1	D2	D3	D4	D5	D6	D7	TP	CO
Change Requests										
Estimates										
<input type="checkbox"/>	Update Estimate Required Status	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Manage Estimate Request	<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="checkbox"/>	Manage Estimate Request 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"/>
<input type="checkbox"/>	LRE Estimator	<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="checkbox"/>	Trns*port Estimator	<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="checkbox"/>	RWMS Estimator	<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="checkbox"/>	Set Estimate Locked Date	<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.

The Estimate Change Request Module

This module allows users to manage Estimate Change Requests. Estimate Change Requests are then reviewed by appropriate staff. Once the Request is approved, the Estimator makes the changes in LRE, Trns*Port or RWMS. All supporting documentation for the Estimate Change Request can be loaded into PSEE.

To initiate an Estimate Change Request, select Estimates under Change Requests in the Module Menu. The Estimates module will be displayed.

Updating the Estimate Required Status

The **Estimate Required**: status defaults to **Yes**. The PSEE Project Manager has the access to update the Estimate Required status to No or Yes. Other Users must be granted the *Update Estimate Required Status* access/privilege.

The screenshot displays the ProjectSuite Enterprise Edition interface. At the top, the user is identified as WILLIAM BARBER, and the work context is set to 'Self'. The navigation bar includes links for Dashboard, Project, Search, Scheduling, Create Project, Assignments, Other Tools, Reports, and Help. The main content area is titled 'Project Info [424621-1]' and contains an 'Estimates' section. Within this section, the status is 'Estimate Required: Yes' with a link to '[Set Estimate Not Required]'. Below this are expandable sections for 'Construction Estimates', 'Right of Way Estimates', and 'Estimate Requests'. The 'Estimate Requests' section includes a filter by 'Estimate Source' with radio buttons for 'All', 'LRE', 'RWMS', and 'Trms*Port'. A message states 'No Estimate Change Requests to display.' and a link to '[Add Estimate Change Request]' is provided. On the left, the 'Module Menu' is visible, with 'Estimates' selected under the 'Change Requests' category. The right sidebar shows 'My Projects'.

Viewing Estimate Information

Estimate Information that is found under the Financial Module is also available to be viewed in the Estimates Module. More information on the Construction Estimates and Right of Way Estimates subsections can be found in the [Financial Module Help Document](#). These subsections are read-only and must be expanded to view.

The screenshot displays the ProjectSuite Enterprise Edition web interface. At the top, the user is identified as WILLIAM BARBER, and the work context is set to 'Self'. A navigation bar includes links for Dashboard, Project, Search, Scheduling, Create Project, Assignments, Other Tools, Reports, and Help. A 'Go To Project' field is present. The left sidebar contains a 'Module Menu' with categories: Manage (Address Book, Approved Scope, Commitments, Contracts, Design Approval Requests, Environment, External Agency, Permits, Project Fact Sheet, Project Status, Survey Work Order), Change Requests (Critical Schedule, **Estimates**, Project Change Package, Scheduling, Scope, Work Program (Includes Phases), WP Phase 52), and View (Documents, ERC, Financial, GIS, Local Agency Program, Project Impacts, PSM, Related Projects). The main content area shows 'Project Info [424621-1]' and 'Estimates (Click to collapse)'. Under 'Estimates', there is a link for 'Estimate Required: Yes [Set Estimate Not Required]'. Two subsections are listed: 'Construction Estimates (Click to expand)' and 'Right of Way Estimates (Click to expand)', both highlighted with red boxes. Below these is an 'Estimate Requests (Click to collapse)' section with a filter for 'Estimate Source' (All, LRE, RWMS, Trns*Port) and a message 'No Estimate Change Requests to display.' with a link to '[Add Estimate Change Request]'. A 'My Projects' sidebar is visible on the right.

Creating an Estimate Change Request

The **Add Estimate Change Request** hyperlink is displayed to users with access/privilege. The PSEE Project Manager has the access to add the Estimate Change Request. Other Users must be granted the *Manage Estimate Request* access/privilege.

1. Select the **Add Estimate Change Request** link. A new window will appear.

The screenshot displays the ProjectSuite Enterprise Edition web interface. At the top, the user is identified as WILLIAM BARBER, and the current work context is 'Self'. The navigation menu includes options like Dashboard, Project, Search, Scheduling, Create Project, Assignments, Other Tools, Reports, and Help. On the left, a 'Module Menu' lists various project management functions, with 'Estimates' highlighted by a red box. The main content area shows project information for ID 424621-1, including sections for 'Estimates' (collapsed), 'Construction Estimates' (expanded), 'Right of Way Estimates' (expanded), and 'Estimate Requests' (collapsed). A filter for 'Estimate Source' is set to 'All'. Below the filter, it states 'No Estimate Change Requests to display.' A red arrow points to the [\[Add Estimate Change Request\]](#) link at the bottom of this section.

- 2. Enter the details in the displayed “Add Estimate Change Request” window.
- **Estimate Source [Required]:** Choose the appropriate Estimate Source from the dropdown. The Estimate Sources are LRE, RWMS, and Trns*Port.

Note: ⚠ indicates a required field. Symbol disappears when data is entered or drop down selection is made.

- **Reason Code [Required]:** Choose the appropriate Reason Code from the drop down. If Reason Code of “Other” is selected, then a new text box opens, labeled “Other Reason Text” and is also required.

- **Request Description [Required]:** Enter a description of the Estimate Change Request.

- **Requested By [Required]:** Defaults to the PSEE user initiating the Estimate Change Request, but can be changed to another internal user.
 - **For Internal Users** begin typing the first and/or last name of the Internal User. A list of matching names will appear. Select the name of the “Requested By” person.

- Change Request Workflow [Optional]:** If the District Administrator has established a Workflow for this Change Request Type, then the available list of Workflows within that District will appear in the drop down and one can be selected. By selecting a Change Request Workflow, the staff defined in this group will have an Assignment generated when the Estimate Change Request is submitted. Reference the [District Administrators – Managing Change Request Workflow](#) Help Document for more information.

Add Estimate Change Request

Estimate Source:

Reason:

Other Reason Text: 92 of 255

Request Description: 118 of 2000

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

Change Request Workflow:

- Select **Save** when all information is entered.
- The Estimate Change Request is displayed. **Note that the Estimate Change Request is in a Draft Status. The Estimate Change Request has not been forwarded to reviewers at this point.** You can now edit the request and upload supporting documentation.

Project Info [424621-1] [\(Click to expand\)](#)

Estimates [\(Click to collapse\)](#)

Estimate Required: Yes [\[Set Estimate Not Required\]](#)

Construction Estimates [\(Click to expand\)](#)

Right of Way Estimates [\(Click to expand\)](#)

Estimate Requests [\(Click to collapse\)](#)

[Return to Estimate Change Request List](#) [\[Edit\]](#) [\[Submit\]](#)

Request Description:	The new bridges will alleviate the flooding issues that we now have with the culverts. The Road may need to be raised.	
Reason:	Other	Status: Draft
Other Reason Text:	Please run an estimate replacing existing 4 - 10' box culverts with two bridges at station.	
Created Date:	6/5/2012	Submitted Date:
Completed Date:		
Requested By:	WILLIAM BARBER	Completed By:
Estimate Source:	LRE	

- The top section of the screen includes the information entered when the Request was created. This information can be changed by selecting the **Edit** hyperlink.

Estimate Requests (Click to collapse)
[Return to Estimate Change Request List](#) [Edit](#) [Submit](#)

Request Description: The new bridges will alleviate the flooding issues that we now have with the culverts. The Road may need to be raised. Safety barriers will need to be added.

Reason: Other **Status:** Draft

Other Reason Text: Please run an estimate replacing existing 4 - 10' box culverts with two bridges at station.

Created Date: 6/5/2012 **Submitted Date:**

Completed Date:

Requested By: WILLIAM BARBER **Completed By:**

Estimate Source: LRE

- Enter changes and click on the Save button.

Edit Estimate Change Request

Estimate Source: LRE

Reason: Other

Other Reason Text: 91 of 255
 Please run an estimate replacing existing 4 - 10' box culverts with two bridges at station.

Request Description: 157 of 2000
 The new bridges will alleviate the flooding issues that we now have with the culverts. The Road may need to be raised. Safety barriers will need to be added.

Requested By: WILLIAM BARBER [\[Show all users\]](#)

Change Request Workflow: [New assignments will be appended if available.]

Estimate Change Request Comments

- The first subsection under the Estimate Requests section is the Estimate Change Request Comments. Click on the **Add Comment** hyperlink to enter comments related to the Estimate Change Request.

Estimate Change Request Comments (Click to collapse)
 Currently No Comments exist for this Estimate Change Request
[Add Comment](#)

- Comments specific to the Estimate Change Request can be entered. Select **Save** when comments are entered.

Add Estimate Change Request Comment

Comment: 101 of 255
 The new Estimate provides amounts required to resolve the flooding issues on this section of Roadway.

Review Assignments within the Change Request Workflow

District Administrators must establish Workflows of the Reviewers that will be the default group of Reviewers when a Change Request is created. The Workflows are given a unique name for identification and selection. Several Workflows can be created to be used for the different types of Change Requests. If a Workflow is **not** established by the District Administrators prior to the creation of a Change Request, there will be no Workflow to select. If the Change Request has no Reviewers, it can continue to be processed, but Reviewers will have to be assigned by the Requestor prior to submitting the Change Request. Reference the [District Administrators – Managing Change Request Workflow](#) Help Document for more information.

Review Assignments for the Estimate Change Request

When an Estimate Change Request is created and a named Workflow is selected, the Reviewers in the Workflow are assigned to the Estimate Change Request. If the Requestor for the Change Request is someone other than the PSEE Project Manager, the PSEE Project Manager will be added at the top of the list of Assigned Reviewers, unless that person already exists in the selected Workflow. The defaulted Reviewer Assignments may be added to or removed from the Change Request while in a status of Draft as appropriate for the specific Change Request.


Review Assignments are used to request a formal review from a User on an Estimate Change Request. Staff with a Review Assignment has a “vote” in the outcome of the Review. The Estimate Change Request cannot be finalized until all Review Assignments have been completed.

Note: The **Add Assignments**, **Reorder Assignments**, and **Remove** hyperlinks are displayed to users with the access/privilege. The PSEE Project Manager has access to manage the Assignments. Other Users must be granted the *Manage Estimate Request Assignment* access/privilege.

Adding Additional Assignments

If there is a need for additional Assignments, those can be added after the default assignments are created from the selected Workflow.

1. Select the **Add Assignment** hyperlink. A new window displays.




Order	Reviewer	Status	Completed Date	
1	RICHARD YATES	Pending		[Remove]

[\[Add Assignment\]](#)

2. Begin typing the first or last name of the Internal User. A list of matching names will appear. A list of potential names will appear. Select the correct person from the list.

Add Estimate Change Request Assignment

Reviewer: Hewett  [\[Show district users only\]](#)

- HEWETT, ERICA (PM345EH)
- HEWETT, MARY (KNCEGMH)
- HEWETT, ROBERT (KNCEGRH)

3. Select **Save**. The new Reviewer Assignment will display.

Reviewer Assignment (Click to collapse)				
	Order	Reviewer	Status	Completed Date
+	1	RICHARD YATES	Pending	[Remove]
+	2	ERICA HEWETT	Pending	[Remove]

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

Reordering Reviewer Assignments

When there are two or more Reviewer Assignments, the Assignments can be reordered. The order of the Reviewers will establish the order in which they review the Estimate Change Request. The first Reviewer will receive notification to begin reviewing when the Change Request is submitted.

1. Select the **Reorder Assignments** hyperlink.

Reviewer Assignment (Click to collapse)				
	Order	Reviewer	Status	Completed Date
+	1	RICHARD YATES	Pending	[Remove]
+	2	ERICA HEWETT	Pending	[Remove]

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

2. Select a name and click on Move Up or Move Down. Select **Save** when order is correct.

Reorder Estimate Change Request Assignment

ERICA HEWETT

RICHARD YATES

[Move Up](#)

[Move Down](#)

3. The updates are saved.

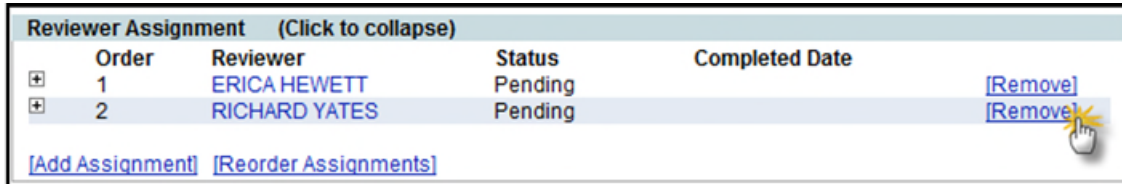
Reviewer Assignment (Click to collapse)				
	Order	Reviewer	Status	Completed Date
+	1	ERICA HEWETT	Pending	[Remove]
+	2	RICHARD YATES	Pending	[Remove]

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

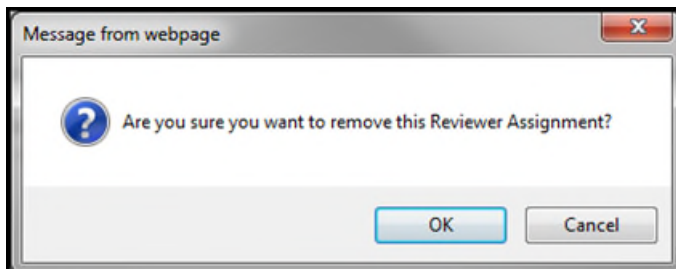
Removing Reviewer Assignments

A Reviewer Assignment can be removed, if it determined that the Reviewer does not need to participate in the review of this Change Request.

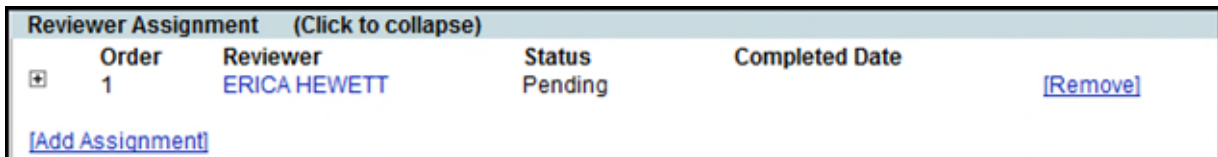
1. Click on the Remove link beside the Reviewer's name.



2. Click OK to confirm the removal of the Reviewer.



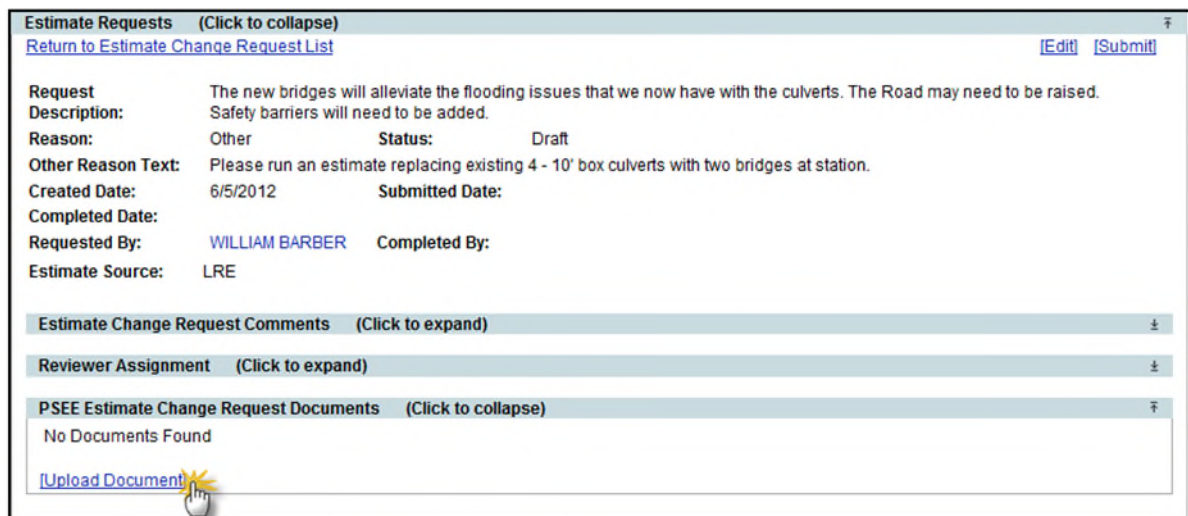
3. The Reviewer Assignment is removed.



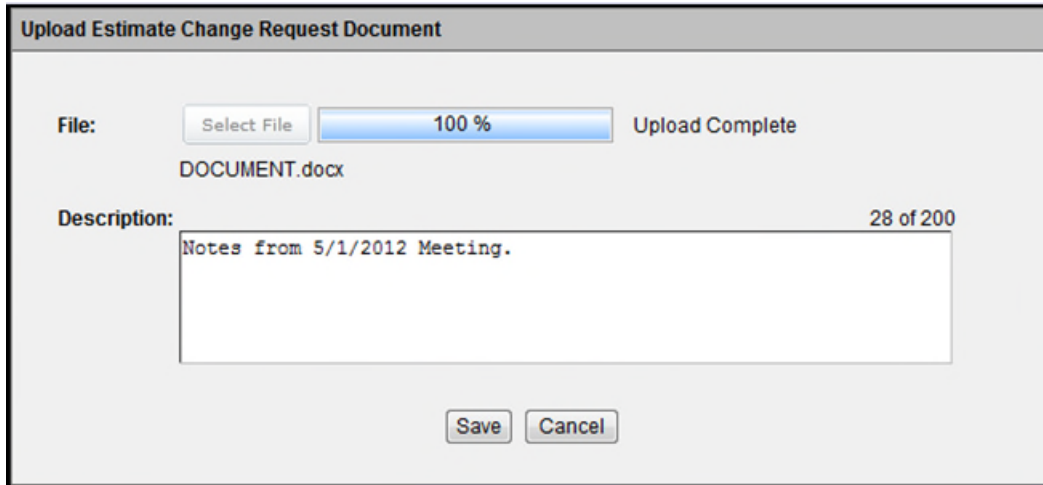
Adding Documents to the Estimate Change Request

Supporting documents may be attached to the Estimate Change Requests.

1. From the PSEE Estimate Change Request Documents section, select the **Upload Document** link.



2. A new window appears. Select the document you wish to upload by selecting the **Select File** button. Add a description for the document [**required**] and select the **Save** button.



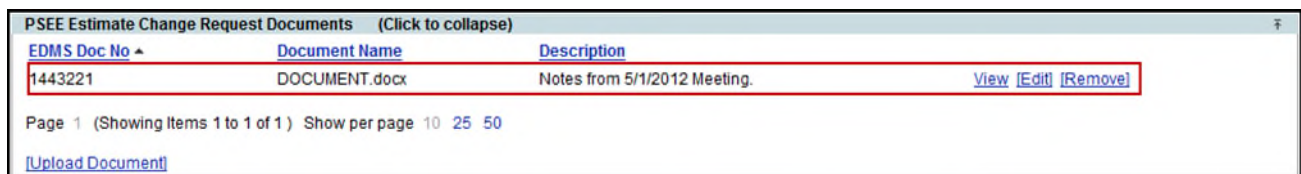
Upload Estimate Change Request Document

File: Upload Complete

DOCUMENT.docx

Description: 28 of 200

3. The document appears in the list. Attached documents can be managed from this list. From the list, you can View, Edit or Remove the document.



EDMS Doc No	Document Name	Description	
1443221	DOCUMENT.docx	Notes from 5/1/2012 Meeting.	View Edit Remove

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

[Upload Document](#)

- Select the **View** link to retrieve the document for display.
- Select the **Edit** link to change the description of the document.
- Select the **Remove** link to remove the document from the Estimate Change Request. You will be prompted with a confirmation dialog box. Select **OK** to remove the document or **Cancel** to retain it.

Submitting an Estimate Change Request

Once all information has been entered, an Estimate Change Request must be submitted to begin the review process.

1. If you are accessing the Estimate Change Request in the Estimates Module in PSEE, select **View** to see the details of the Estimate Change Request.

Project Info [424621-1] (Click to expand)

Estimates (Click to collapse)

Estimate Required: Yes [\[Set Estimate Not Required\]](#)

Construction Estimates (Click to expand)

Right of Way Estimates (Click to expand)

Estimate Requests (Click to collapse)

Filter by Estimate Source: All LRE RWMS Trns*Port

Reason	Estimate Source	Submitted Date	Request Description	Status	As Of Date	Estimate Amount	
View	Other	LRE	The new bridges will alleviate the flooding issues that we now have with the culverts. The Road may need to be raised. Safety barriers will need to be added.	Draft			[Remove]

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

2. Select the **Submit** hyperlink.

Estimates (Click to collapse)

Estimate Required: Yes [\[Set Estimate Not Required\]](#)

Construction Estimates (Click to expand)

Right of Way Estimates (Click to expand)

Estimate Requests (Click to collapse)

[Return to Estimate Change Request List](#) [\[Edit\]](#) [\[Submit\]](#)

Request Description: The new bridges will alleviate the flooding issues that we now have with the culverts. The Road may need to be raised. Safety barriers will need to be added.

Reason: Other **Status: Draft**

Other Reason Text: Please run an estimate replacing existing 4 - 10' box culverts with two bridges at station.

Created Date: 6/5/2012 Submitted Date:

Completed Date:

Requested By: WILLIAM BARBER Completed By:

Estimate Source: LRE

3. The Estimate Change Request status is changed to **In Review**.

Estimate Requests (Click to collapse)

[Return to Estimate Change Request List](#) [\[Withdraw\]](#)

Request Description: The new bridges will alleviate the flooding issues that we now have with the culverts. The Road may need to be raised. Safety barriers will need to be added.

Reason: Other **Status: In Review**

Other Reason Text: Please run an estimate replacing existing 4 - 10' box culverts with two bridges at station.

Created Date: 6/5/2012 Submitted Date: 6/7/2012

Completed Date:

Requested By: WILLIAM BARBER Completed By:

Estimate Source: LRE

Approved Scope: No Approved Scope Available.

- The first Assignee is set to an **In Review** status.

Reviewer Assignment (Click to collapse)				
	Order	Reviewer	Status	Completed Date
+	1	ERICA HEWETT	In Review	
+	2	RICHARD YATES	Pending	

[\[Add Assignment\]](#)

- An email is generated to the first Reviewer designated in the Reviewer Assignment subsection. Assignee Reviews are completed in the order in which listed. The remaining Assignees are in a Status of Pending and are not notified that they must complete a review until the previous Assignee review has been completed.

[TEST] PSEE: Project: 424621-1 Activity: Open Estimate Change Request Assignment By: WILLIAM BARBER (RD352BW)

FDOT-PSEE-System@dot.state.fl.us Thursday, June 07, 2012 1:11 PM

From: WILLIAM.BARBER@DOT.MYFLORIDA.COM
 Recipients: ERICA.HEWETT@DOT.MYFLORIDA.COM,

Click to see the referenced [Project](#) in PSEE

Change Request Assignment

Reviewer: ERICA HEWETT
 Order: 1
 Status: In Review
 Status Date: 6/7/2012
 Assigned Date: 6/7/2012
 Comment:

Reviewer Assignment Comments

1. The Reviewer Assignee may click on the **Status Update** hyperlink to enter any Comments related to the Estimate Change Request without approving or denying.

Reviewer Assignment (Click to collapse)				
Order	Reviewer	Status	Completed Date	
1	ERICA HEWETT	In Review		[Status Update] [Request Changes]

2. Select 'In Review' status from the drop down, enter Comments and click on the **Save** button. The In Review status is used only if the Reviewer needs to enter comments and is not ready to approve or reject the Change Request.

Update Status of Request Assignment

Status:

Comment: 84 of 2000

Completing a Reviewer Assignment

1. To complete a Review Assignment, the Reviewer Assignee must Approve or Reject the request by updating the status. Select the **Status Update** hyperlink.

Reviewer Assignment (Click to collapse)				
Order	Reviewer	Status	Completed Date	
1	ERICA HEWETT	In Review		[Status Update] [Request Changes]

2. Change the Status in the drop down and enter any Comments [optional]. Click on the **Save** button.

Update Status of Request Assignment

Status:

Comment: 42 of 2000

3. Changing the status to **Approved** will finish the Review Assignment and, if there are no more Reviewer Assignments, will set the Change Request status to Approved.

Estimates (Click to collapse)

[Lock Estimate Requests](#)

Estimate Required: Yes

Construction Estimates (Click to expand)

Right of Way Estimates (Click to expand)

Estimate Requests (Click to collapse)

[Return to Estimate Change Request List](#) [\[Reject\]](#) [\[Complete\]](#)

Request The new bridges will alleviate the flooding issues that we now have with the culverts. The Road may need to be raised.
Description: Safety barriers will need to be added.
Reason: Other **Status:** Approved
Other Reason Text: Please run an estimate replacing existing 4 - 10' box culverts with two bridges at station.
Created Date: 6/5/2012 **Submitted Date:** 6/8/2012
Completed Date:
Requested By: WILLIAM BARBER **Completer:**
Estimate Source: LRE
Approved Scope: No Approved Scope Available.

Estimate Change Request Comments (Click to expand)

Reviewer Assignment (Click to collapse)

Order	Reviewer	Status	Completed Date
1	ERICA HEWETT	Approved	6/8/2012
2	RICHARD YATES	Approved	6/8/2012

4. The status of the Reviewer Assignment is updated. To view the details of the Reviewer Assignment, select the plus link to the left of the Assignee name.

Reviewer Assignment (Click to collapse)

Order	Reviewer	Status	Completed Date
1	ERICA HEWETT	Approved	6/7/2012

Comment: I am in agreement with the Estimate Change Request.

5. Changing the status to **Rejected** will finish the Review Assignment and will stop the Change Request from moving forward and being approved. The Requestor is notified that the Change Request is rejected. The Information entered in the Comments is viewable by the Requestor when Rejected.

Update Status of Request Assignment

Status: Approved

Comment: Approved 85 of 2000
 Rejected
 I am in agreement with the Estimate Change Request until more justification is provided.

Request Changes to the Estimate Change Request

1. When the Reviewer needs more information to complete his/her review, click on Request Changes hyperlink.

Reviewer Assignment (Click to collapse)				
Order	Reviewer	Status	Completed Date	
1	ERICA HEWETT	In Review		[Status Update] [Request Changes]

2. Enter the questions or request for additional information. Click on the Save button.

Request Changes to Change Request

Comment: 84 of 2000

Review is on hold until supporting documentation is received from the Design office.

3. The Change Request status is changed to Revision and the Review Assignments are set to Pending. This will stop the Change Request from moving forward and being approved. The Requestor is notified that Change Request needs revision. The Information entered in the Comments is viewable by the Requestor.

Estimates (Click to collapse)				
Estimate Required: Yes [Set Estimate Not Required]				
Construction Estimates (Click to expand)				
Right of Way Estimates (Click to expand)				
Estimate Requests (Click to collapse)				
Return to Estimate Change Request List [Edit] [Submit]				
Request Description:	The new bridges will alleviate the flooding issues that we now have with the culverts. The Road may need to be raised.			
Reason:	Other Status: Revision			
Other Reason Text:	Please run an estimate replacing existing 4-10' box culverts with two bridges at station.			
Created Date:	6/15/2012 Submitted Date:			
Completed Date:				
Requested By:	WILLIAM BARBER Completer:			
Estimate Source:	LRE			
Estimate Change Request Comments (Click to expand)				
Reviewer Assignment (Click to collapse)				
Order	Reviewer	Status	Completed Date	
1	ERICA HEWETT	Pending		[Remove]
[Add Assignment]				

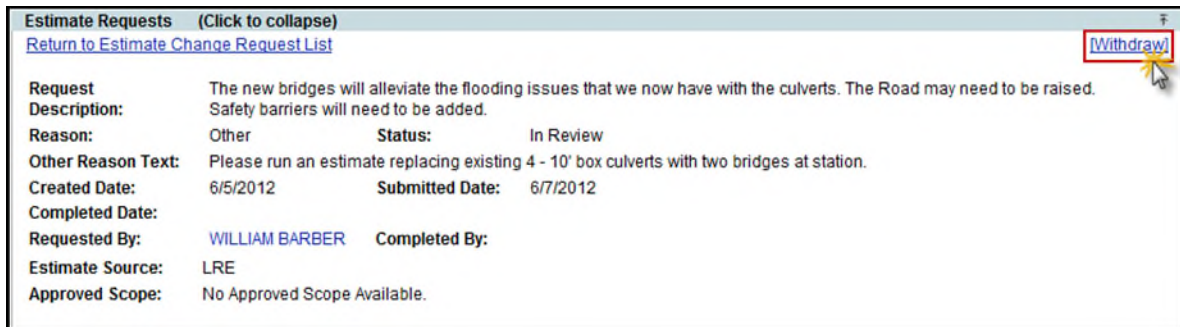
4. Once revisions are made to satisfy the requested changes, the Change Request can be submitted again. The Change Request starts over again with the first Reviewer Assignment.

The Withdraw Of the Estimate Change Request

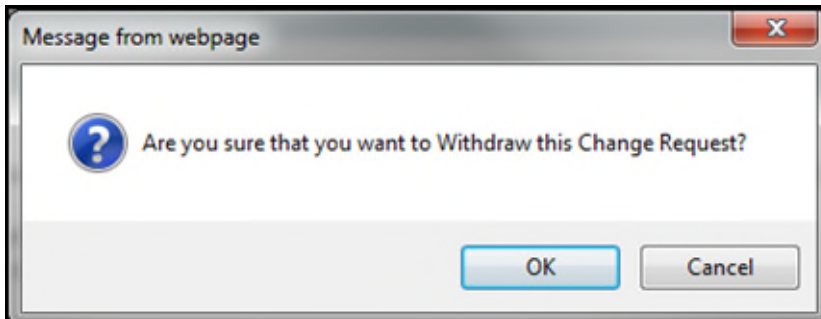
An Estimate Change Request may be withdrawn if it is determined that it is no longer needed.

Once an Estimate Change Request is submitted changing from a DRAFT status to an In Review status, the Change Request may be withdrawn by anyone with privilege. The Withdraw hyperlink appears in the upper right hand corner for the PSEE Project Manager or the User with the *Manage Estimate Request* privilege.

1. Select the Withdraw hyperlink.



2. There is a confirmation that asks "Are you sure you want to Withdraw this Change Request? This action cannot be undone." Click OK to proceed with the withdrawal of the Change Request.



Revision of the Estimate Change Request

Note: The PSEE Project Manager or the User with the *Manage Estimate Request* privilege has the authority to revise, edit, and submit.

An Estimate Change Request in a Status of Withdrawn can be **revised** by anyone with privileges. The **Revise** hyperlink appears for an Estimate Change Request in a status of Withdrawn.

1. Select the Revise hyperlink.

Estimate Requests (Click to collapse)	
Return to Estimate Change Request List	
[Revise]	
Request Description:	The new bridges will alleviate the flooding issues that we now have with the culverts. The Road may need to be raised. Safety barriers will need to be added.
Reason:	Other Status: Withdrawn
Other Reason Text:	Please run an estimate replacing existing 4 - 10' box culverts with two bridges at station.
Created Date:	6/5/2012 Submitted Date: 6/7/2012
Completed Date:	
Requested By:	WILLIAM BARBER Completed By:
Estimate Source:	LRE

2. The Estimate Change Request is set to a Revision status. The user may click on the Edit hyperlink to make changes.

Estimate Requests (Click to collapse)	
Return to Estimate Change Request List	
[Edit] [Submit]	
Request Description:	The new bridges will alleviate the flooding issues that we now have with the culverts. The Road may need to be raised. Safety barriers will need to be added.
Reason:	Other Status: Revision
Other Reason Text:	Please run an estimate replacing existing 4 - 10' box culverts with two bridges at station.
Created Date:	6/5/2012 Submitted Date:
Completed Date:	
Requested By:	WILLIAM BARBER Completed By:
Estimate Source:	LRE

3. The Estimate Change Request can be Submitted after editing is complete. A Submit will start the process again with the first Reviewer Assignment.

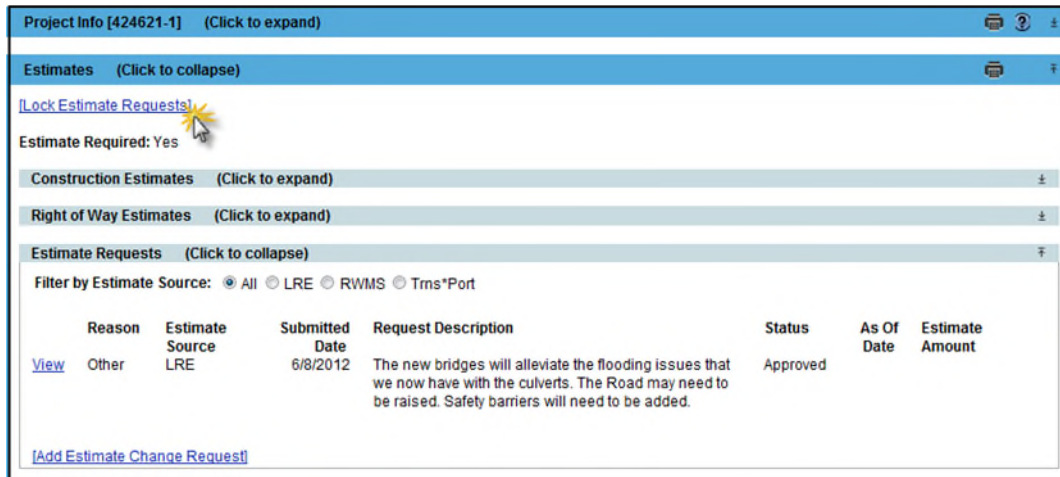
Estimate Requests (Click to collapse)	
Return to Estimate Change Request List	
[Edit] [Submit]	
Request Description:	The new bridges will alleviate the flooding issues that we now have with the culverts. The Road may need to be raised. Safety barriers will need to be added.
Reason:	Other Status: Revision
Other Reason Text:	Please run an estimate replacing existing 4 - 10' box culverts with two bridges at station.
Created Date:	6/5/2012 Submitted Date:
Completed Date:	
Requested By:	WILLIAM BARBER Completed By:
Estimate Source:	LRE

Setting the Estimate Locked Date

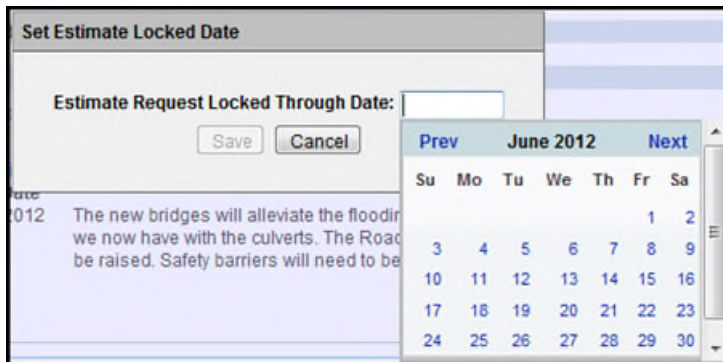
Note: The User with the *Set Estimate Locked Date* privilege has the authority to lock Estimate Change Requests. The PSEE Project Manager does not have this privilege.

The Estimate Locked Date is a way to lock a Project so that no new Estimate Change Requests can be created and no Estimate Change Requests in a Draft status can be submitted. The Locked through Date provides the ability to manage changes from occurring on a project during a specific period. The Locked through Date does not affect or stop Estimate Change Requests that are in a Status of **In Review** or **Approved** from being completed.

1. Click on the **Lock Estimate Requests** hyperlink.



2. Enter an **Estimate Request Locked Through Date** by selecting a date from the calendar displayed. Click on Save.



- The Locked Through Date is displayed. The Add Estimate Change Request hyperlink is no longer displayed until the Locked Through Date is past.

The screenshot shows a web interface for 'Estimates'. At the top, there is a blue header with 'Estimates (Click to collapse)'. Below this, a message states: 'This Project's Estimate Request is locked through 6/11/2012'. This message is enclosed in a red rectangular box. To the right of the message are two hyperlinks: '[Update the Estimate Request Locked Through Date]' and '[Unlock Estimate Request]'. Below the message, it says 'Estimate Required: Yes'. There are three expandable sections: 'Construction Estimates (Click to expand)', 'Right of Way Estimates (Click to expand)', and 'Estimate Requests (Click to collapse)'. Under 'Estimate Requests', there is a filter section: 'Filter by Estimate Source: All (selected), LRE, RWMS, Trns*Port'. Below the filter is a table with the following data:

Reason	Estimate Source	Submitted Date	Request Description	Status	As Of Date	Estimate Amount
View	Other	LRE	6/8/2012	The new bridges will alleviate the flooding issues that we now have with the culverts. The Road may need to be raised. Safety barriers will need to be added.	Approved	

- If the date needs to change, click on the **Update the Estimate Request Locked Through Date** hyperlink. Adjust date and click on Save.
- If the Date needs to be unlocked, click on the **Unlock Estimate Request** hyperlink and lock is removed.

Completing the Estimate Change Request

Once all Reviewer Assignments for the Change Request are complete, the Estimator will be notified to make the Estimate update in the appropriate application (LRE, RWMS, or Trns*Port).

Note: The PSEE Project Manager has the authority to complete the Estimate Change Request in PSEE on behalf of the Estimator to document that the Estimate update has been made in LRE, RWMS, or Trns*Port.

The Estimator may be granted the *LRE Estimator* privilege, *Trns*port Estimator* privilege, and/or the *RWMS Estimator* privilege in order to get the display of the Complete hyperlink in PSEE. After making the Estimate update in the appropriate application (LRE, RWMS, or Trns*Port), the Estimator that has been granted privilege can complete the Estimate Change Request in PSEE. Example: An LRE Estimator must have the LRE Estimator privilege in order to be able to complete an Estimate Change Request with an LRE Estimate Source.

1. Estimator clicks on the Complete hyperlink.

Order	Reviewer	Status	Completed Date
1	ERICA HEWETT	Approved	6/8/2012
2	RICHARD YATES	Approved	6/8/2012

2. Enter the information as appropriate.

Note: The Estimator has the ability to generate a new WP Phase 52 Change Request as part of the completion of the Estimate Change Request.

- The Estimate Change Request status is set to Completed. The Estimator’s name or PSEE Project Manager’s name is entered in the Completer field that completes the Estimate Change Request in PSEE.

Note: When the Estimate Change Request is in a Completed Status three new fields will display.

- Estimate Description: Description entered by Estimator of action taken in LRE, RWMS, or Trns*Port.
- As of Date: This is the date that the Estimate was completed in LRE, RWMS, or Trns*Port.
- Estimate Amount: This is the Estimate Amount calculated in the LRE, RWMS, or Trns*Port and entered by the Estimator in PSEE.

Estimate Requests (Click to collapse)	
Return to Estimate Change Request List	
Request Description:	The new bridges will alleviate the flooding issues that we now have with the culverts. The Road may need to be raised. Safety barriers will need to be added.
Reason:	Other Status: Completed
Other Reason Text:	Please run an estimate replacing existing 4 - 10' box culverts with two bridges at station.
Created Date:	6/5/2012 Submitted Date: 6/8/2012
Completed Date:	6/8/2012
Requested By:	WILLIAM BARBER Completer: RICHARD YATES
Estimate Source:	LRE
Approved Scope:	No Approved Scope Available.
Estimate Information	
Estimate Description:	Estimate Change Request has been made in the LRE application. This change will generate a WP Construction Phase addition.
As Of Date:	6/8/2012 Estimate Amount: \$ 200,000.00

Estimator Rejection of the Estimate Change Request

Once all Reviewer Assignments for the Change Request are complete and the Estimate Change Request status is Approved, the Estimator will be notified. If the District Estimator determines that there is some reason that the Estimate Change Request cannot be completed in the appropriate application (LRE, RWMS, or Trns*Port), the Estimator will click on the Reject hyperlink in the Estimate Change Request.

Estimates (Click to collapse) ⌵

[\[Lock Estimate Requests\]](#)

Estimate Required: Yes

Construction Estimates (Click to expand) ⌵

Right of Way Estimates (Click to expand) ⌵

Estimate Requests (Click to collapse) ⌵

[Return to Estimate Change Request List](#) [\[Reject\]](#) [\[Complete\]](#)

Request Description: The new bridges will alleviate the flooding issues that we now have with the culverts. The Road may need to be raised. Safety barriers will need to be added.

Reason: Other **Status:** Approved

Other Reason Text: Please run an estimate replacing existing 4 - 10' box culverts with two bridges at station.

Created Date: 6/5/2012 **Submitted Date:** 6/8/2012

Completed Date:

Requested By: [WILLIAM BARBER](#) **Completer:**

Estimate Source: LRE

Approved Scope: No Approved Scope Available.

Estimate Change Request Comments (Click to expand) ⌵

Reviewer Assignment (Click to collapse) ⌵

	Order	Reviewer	Status	Completed Date
+	1	ERICA HEWETT	Approved	6/8/2012
+	2	RICHARD YATES	Approved	6/8/2012