The Estimate Change Request Module

Contents

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.

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.

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.

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.

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.

3. Select **Save** when all information is entered.

4. 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.

5. 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		

6. 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.]

Save   Cancel

Estimate Change Request Comments

1. 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]		

2. 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.

Save   Cancel

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.

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.

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.

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

3.   The updates are saved.

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.
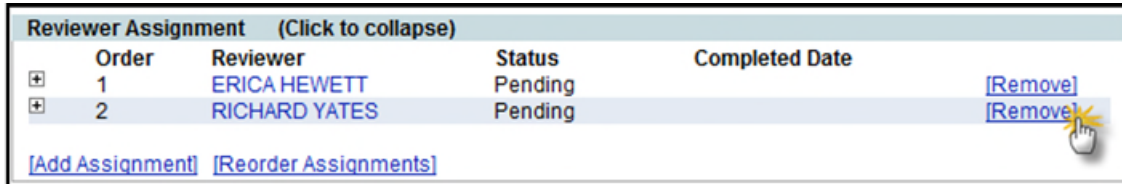
2. Click OK to confirm the removal of the Reviewer.
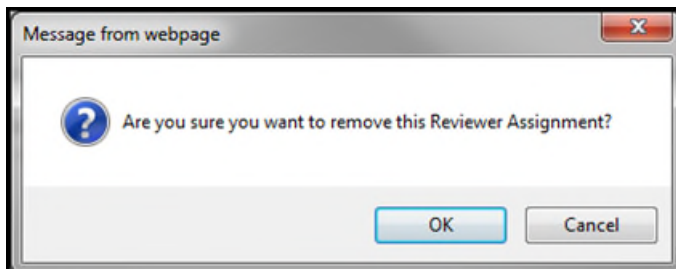
3. The Reviewer Assignment is removed.

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.
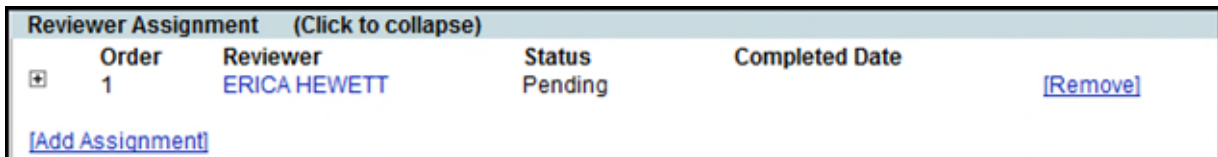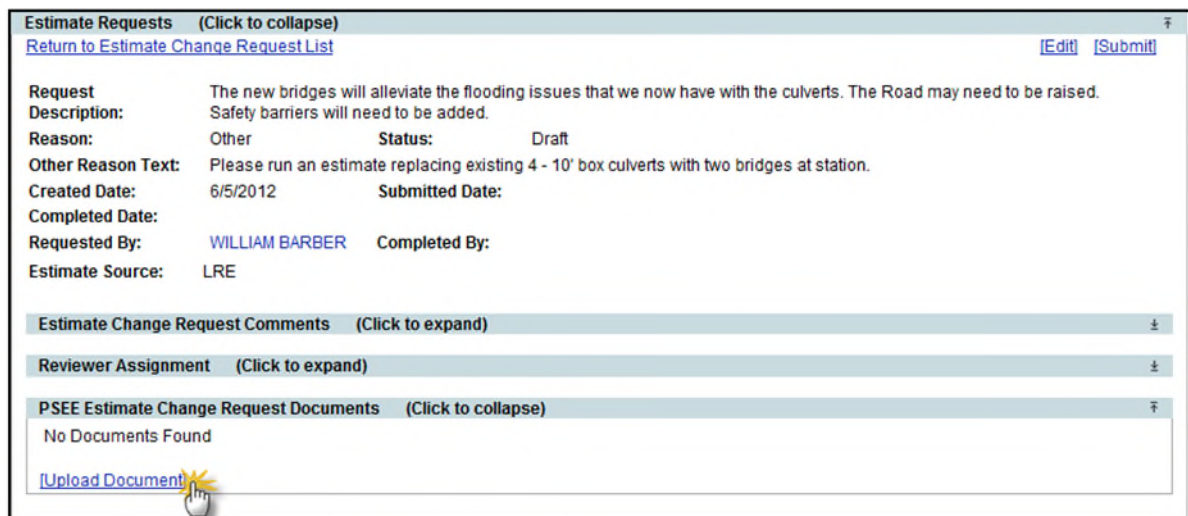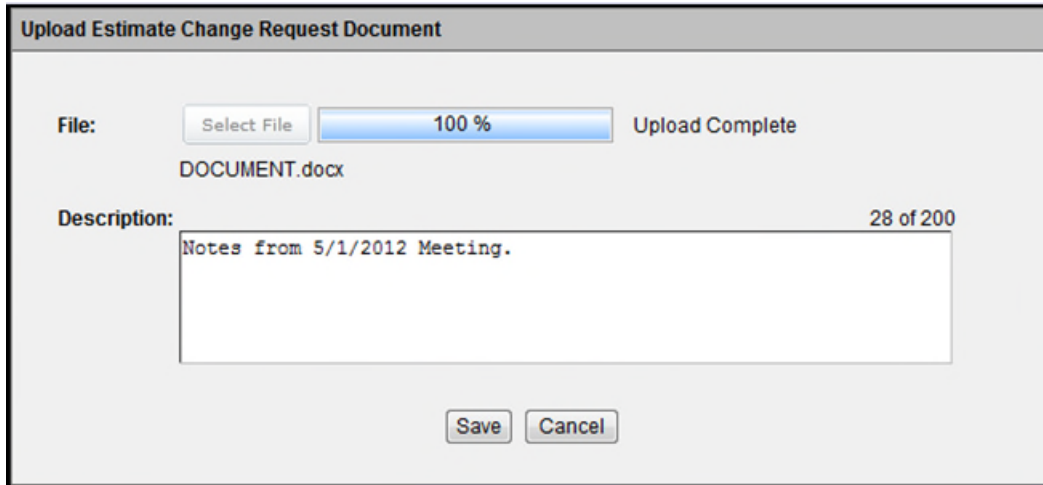

3. The document appears in the list. Attached documents can be managed from this list. From the list, you can View, Edit or Remove the document.

- 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.

2. Select the **Submit** hyperlink.

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

3. 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]				

4. 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.

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.

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.

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

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.

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.

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.

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.

[Save] [Cancel]

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)

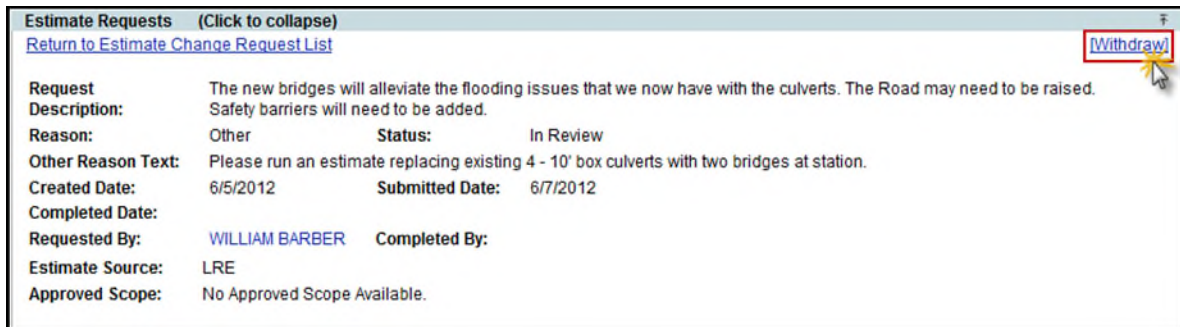|	Order	Reviewer	Status	Completed Date	
⊞	1	ERICA HEWETT	Pending		[Remove]

[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.
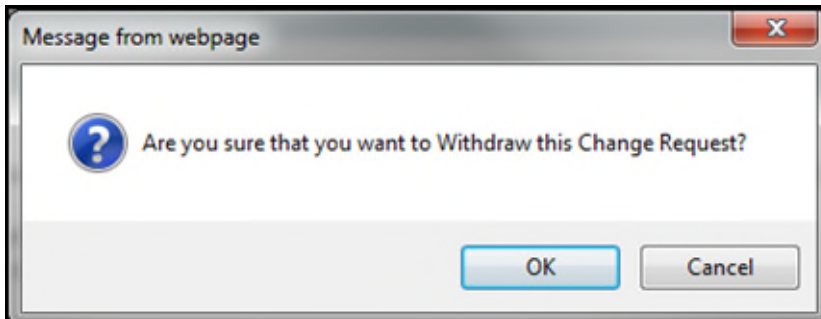
The Withdraw Of the Estimate Change Request

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.

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.			

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.

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

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

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.
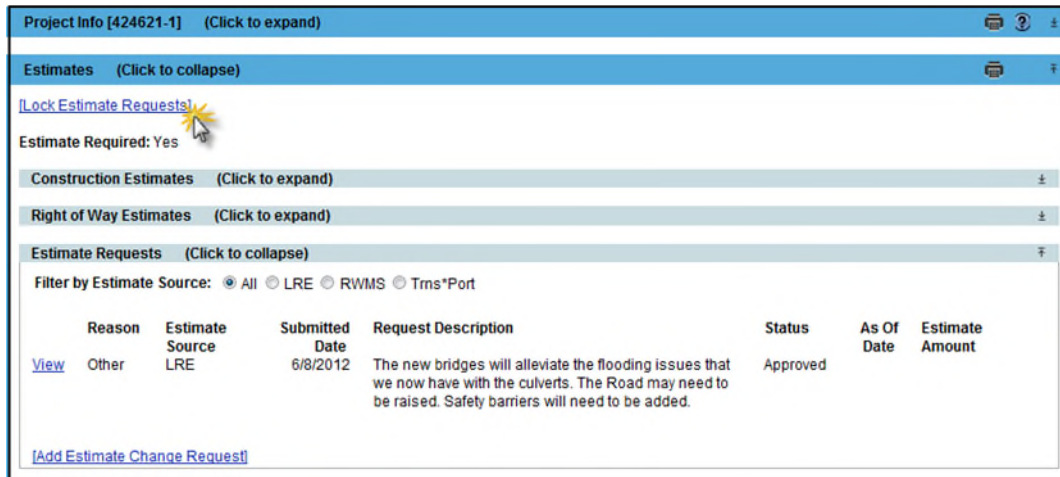
2. Enter an **Estimate Request Locked Through Date** by selecting a date from the calendar displayed. Click on Save.
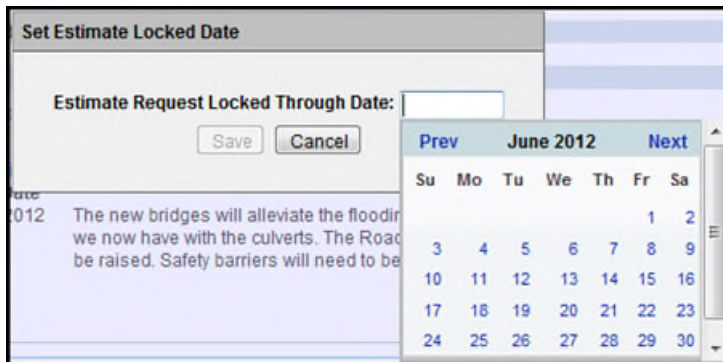
3. The Locked Through Date is displayed. The Add Estimate Change Request hyperlink is no longer displayed until the Locked Through Date is past.

Estimates	(Click to collapse)							
This Project's Estimate Request is locked through 6/11/2012	[Update the Estimate Request Locked Through Date]	[Unlock Estimate Request]						

Estimate Required: Yes

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	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		

4. If the date needs to change, click on the **Update the Estimate Request Locked Through Date** hyperlink. Adjust date and click on Save.
5. 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.

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.

3. 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.

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.