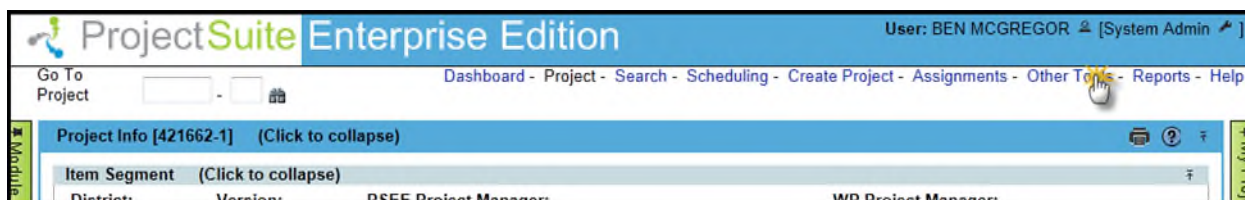


Other Tools

The Other Tools section of PSEE provides additional functionality, not bound by an individual project. In order to use these tools, navigate to the Other Tools page by clicking on the **Other Tools** hyperlink in the main menu at the top right of the page.



This page currently has two sections: Manage Lockout Dates and Manage Annual LRE Estimate Requests. Both of these sections are described in detail below.

Manage Lockout Dates

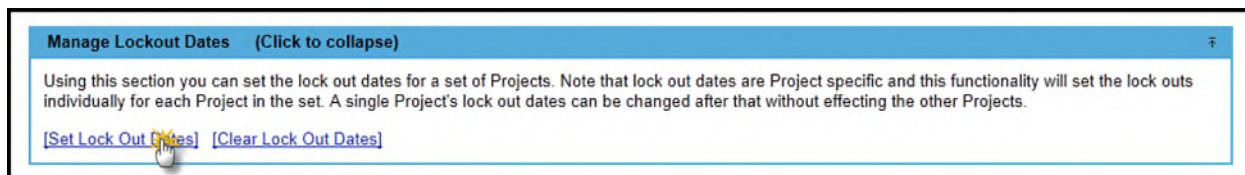
The Manage Lockout Dates section allows for a user with the correct permissions to set or clear the lockout dates for a set of projects in a district for the Scheduling, Estimate, and Scope Change Request Modules. The possible permissions for this are:

- Set Schedule Lock Through Date
- Set Estimate Locked Date
- Set Scope Locked Date

If a user does not have any of these permissions, the Manage Lockout Dates section will not appear. For more information on how to obtain permissions, please read the [Privileges and Notifications Help Document](#).

To set the Locked Date for a set of projects:

1. Click on the **Set Lock Out Dates** hyperlink. This will open a modal window.



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- In the modal window, first select the District in which the Projects to be selected reside.

Set Lock Out Dates

1) Select District:

2) Select Project Set:
 All Projects in District
 By Project Manager

3) Select Lock Out Date Types:
 Scheduling
 Estimates
 Scope

4) Select Lock Out Date:

- Then, select either all of the projects in the District or Projects in that District with a particular PSEE Project Manager. If the user selects Project Manager, begin typing the Project Manager's name in the text field, and select their entry in the drop down list. The number of Projects affected by this operation will appear in the modal window just below where the type of Lock Out Date is chosen.

Set Lock Out Dates

1) Select District:

2) Select Project Set:
 All Projects in District
 By Project Manager

3) Select Lock Out Date Types:
 Scheduling
 Estimates
 Scope

4) Select Lock Out Date:

- Choose the request type for which to set the Lock Out Date. Possible choices are determined by the previously mentioned permissions on a per-District basis. If a user does

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not have the permission for a certain request type for a certain District, that option will not appear.

Set Lock Out Dates

1) Select District:
District 1

2) Select Project Set:
 All Projects in District
 By Project Manager BEN MCGREGOR

3) Select Lock Out Date Types:
 Scheduling
 Estimates
 Scope

3 projects will be updated.

4) Select Lock Out Date:
[Empty Date Field] ⚠

Set Lock Out Dates Cancel

5. Enter the Lock Out Date for the Projects in question. No new requests of the specified type(s) will be able to be created until this inputted date.

Set Lock Out Dates

1) Select District:
District 1

2) Select Project Set:
 All Projects in District
 By Project Manager BEN MCGREGOR

3) Select Lock Out Date Types:
 Scheduling
 Estimates
 Scope

3 projects will be updated.

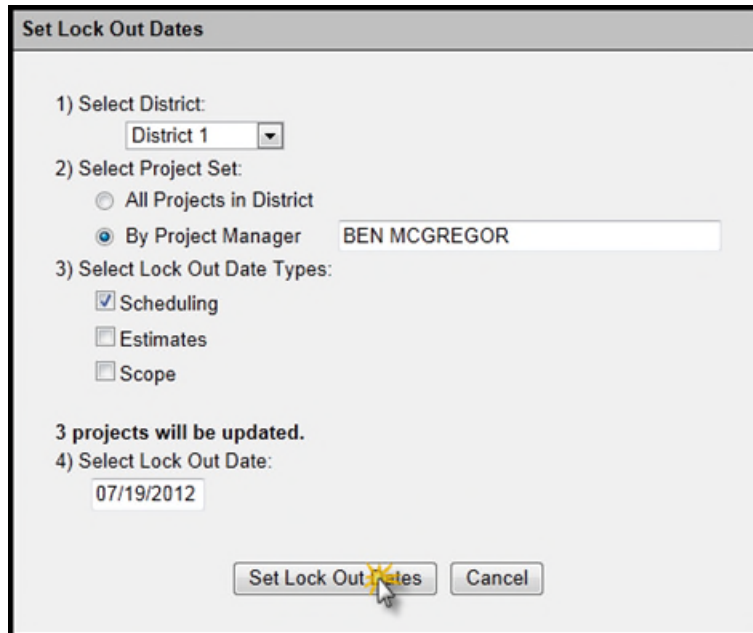
4) Select Lock Out Date:
[Empty Date Field] ⚠

Prev	July 2012							Next
Su	Mo	Tu	We	Th	Fr	Sa		
1	2	3	4	5	6	7		
8	9	10	11	12	13	14		
15	16	17	18	19	20	21		
22	23	24	25	26	27	28		
29	30	31						

Cancel

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- Click the **Set Lock Out Dates** button to set the lock out dates for the Projects in question, or the **Cancel** button to close the window without setting any dates.

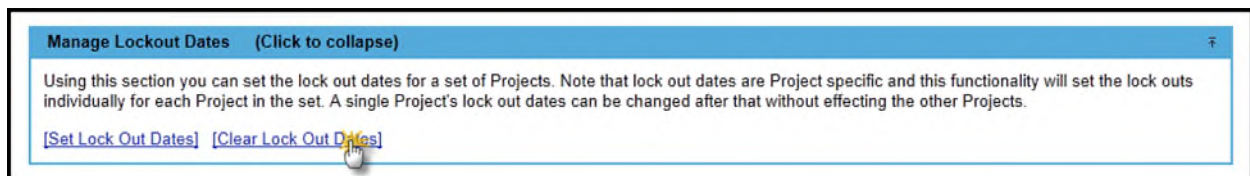


The screenshot shows a modal window titled "Set Lock Out Dates". It contains the following elements:

- 1) Select District: A dropdown menu showing "District 1".
- 2) Select Project Set: Two radio buttons. "All Projects in District" is unselected, and "By Project Manager" is selected. To the right of the selected option is a text input field containing "BEN MCGREGOR".
- 3) Select Lock Out Date Types: Three checkboxes. "Scheduling" is checked, "Estimates" is unchecked, and "Scope" is unchecked.
- 3 projects will be updated.
- 4) Select Lock Out Date: A date input field showing "07/19/2012".
- At the bottom, there are two buttons: "Set Lock Out Dates" and "Cancel". A mouse cursor is hovering over the "Set Lock Out Dates" button.

To clear the Locked Date for a set of projects:

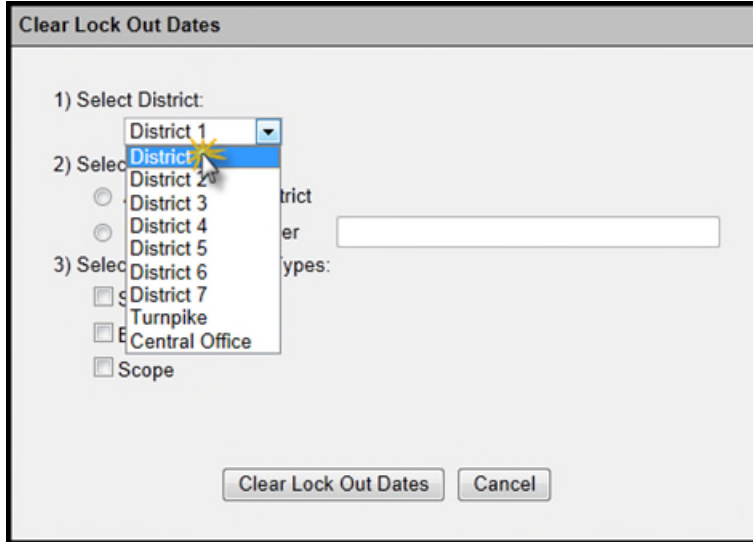
- Click on the **Clear Lock Out Dates** hyperlink. This will open a modal window.



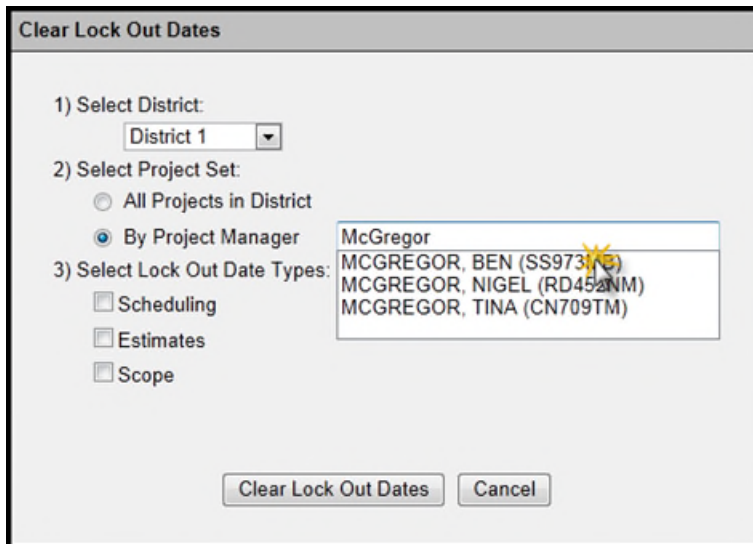
The screenshot shows a modal window titled "Manage Lockout Dates (Click to collapse)". It contains the following elements:

- Using this section you can set the lock out dates for a set of Projects. Note that lock out dates are Project specific and this functionality will set the lock outs individually for each Project in the set. A single Project's lock out dates can be changed after that without effecting the other Projects.
- At the bottom, there are two hyperlinks: "[Set Lock Out Dates]" and "[Clear Lock Out Dates]". A mouse cursor is hovering over the "[Clear Lock Out Dates]" hyperlink.

2. In the modal window, first select which district in which the projects to be selected reside.



3. Then, select either all of the projects in the District or Projects in that District with a particular PSEE Project Manager. If the user selects Project Manager, begin typing the Project Manager's name in the text field, and select their entry in the drop down list. The number of Projects affected by this operation will appear in the modal window just below where the type of Lock Out Date is chosen.



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4. Choose the request type for which to clear the Lock Out Date. Possible choices are determined by the previously mentioned permissions on a per-District basis. If a user does not have the permission for a certain request type for a certain District, that option will not appear.

Clear Lock Out Dates

1) Select District:
District 1

2) Select Project Set:
 All Projects in District
 By Project Manager

3) Select Lock Out Date Types:
 Scheduling
 Estimates
 Scope

Clear Lock Out Dates Cancel

5. Click the **Clear Lock Out Dates** button to clear the lock out dates for the Projects in question, or the **Cancel** button to close the window without clearing any dates.

Clear Lock Out Dates

1) Select District:
District 1

2) Select Project Set:
 All Projects in District
 By Project Manager

3) Select Lock Out Date Types:
 Scheduling
 Estimates
 Scope

Clear Lock Out Dates Cancel

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Manage Annual LRE Estimate Requests

This section displays Projects for which the current user is a Project Manager that either do not have any completed LRE Estimate Requests, or the most recent LRE Estimate Request was completed prior to a specified date. The date can be specified in the date picker field, with new results displayed after clicking the **Refresh** button. For more information on Estimate Requests, please read the [Estimate Change Request Help Document](#).

The screenshot shows the 'Manage Annual LRE Estimate Requests' interface. At the top, there is a title bar with the text 'Manage Annual LRE Estimate Requests (Click to collapse)'. Below the title bar, there is a description: 'Display all Projects I'm Project Manager for that either do not have any Completed LRE Estimate Requests, or the most recent LRE Estimate Request was completed prior to 01/01/2012'. A 'Refresh' button is located next to the date field. Below this, there is a table with the following columns: 'Project', 'Last Completed LRE Estimate', 'Completed On', 'Current LRE Estimate', and 'Status'. The table contains five rows of data. A calendar overlay for January 2012 is displayed over the table, showing the days of the week and the dates. The 'Project' column has a triangle next to the header, indicating it is sorted. The 'Status' column has a 'View' link next to each row.

Project	Last Completed LRE Estimate	Completed On	Current LRE Estimate	Status
193750-3	No Completed LRE Estimate Requests Exist			In Review View
195416-4	No Completed LRE Estimate Requests Exist			In Review View
195719-1	No Completed LRE Estimate Requests Exist			
408206-3	No Completed LRE Estimate Requests Exist			In Review View
419824-1	No Completed LRE Estimate Requests Exist			

- The list may be sorted by clicking any of the hyperlinked headers. The triangle to the right of the headers indicates the direction of the sort. An upward pointing triangle means the sort is ascending, and a downward pointing triangle means the sort is descending.
- You may click on the hyperlinked **Project Numbers** to view the Project page for that Project.
- Clicking the **View** hyperlink will display the Estimate Change Request Module in the Project page.
- Clicking the **Create Request** hyperlink will open a modal window from which you may create an Estimate Change Request for a project. For more information on adding a new Estimate Change Request, please read the [Estimate Change Request Help Document](#).

The screenshot shows the 'Manage Annual LRE Estimate Requests' interface. At the top, there is a title bar with the text 'Manage Annual LRE Estimate Requests (Click to collapse)'. Below the title bar, there is a description: 'Display all Projects I'm Project Manager for that either do not have any Completed LRE Estimate Requests, or the most recent LRE Estimate Request was completed prior to 01/01/2012'. A 'Refresh' button is located next to the date field. Below this, there is a table with the following columns: 'Project', 'Last Completed LRE Estimate', 'Completed On', 'Current LRE Estimate', and 'Status'. The table contains five rows of data. The 'Project' column has a triangle next to the header, indicating it is sorted. The 'Current LRE Estimate' column has a '[Create Request]' link next to each row. The 'Status' column has a 'View' link next to each row.

Project	Last Completed LRE Estimate	Completed On	Current LRE Estimate	Status
193750-3	No Completed LRE Estimate Requests Exist		[Create Request]	
195416-4	No Completed LRE Estimate Requests Exist		testing again	In Review View
195719-1	No Completed LRE Estimate Requests Exist		test	In Review View
408206-3	No Completed LRE Estimate Requests Exist		[Create Request]	
419824-1	No Completed LRE Estimate Requests Exist		test	In Review View