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Project Change Package Module

This Module allows for moving a group of related Change Requests through their lifecycle in a particular order. For more information on related Change Requests, please read their respective Help Documentation:

- Scope Change Request Help Document
- WP Phase 52 Change Request Help Document
- Critical Schedule Change Request Help Document

In order to view the Project Change Package Module, click the **Project Change Package** hyperlink in the Module Menu on the Project page.
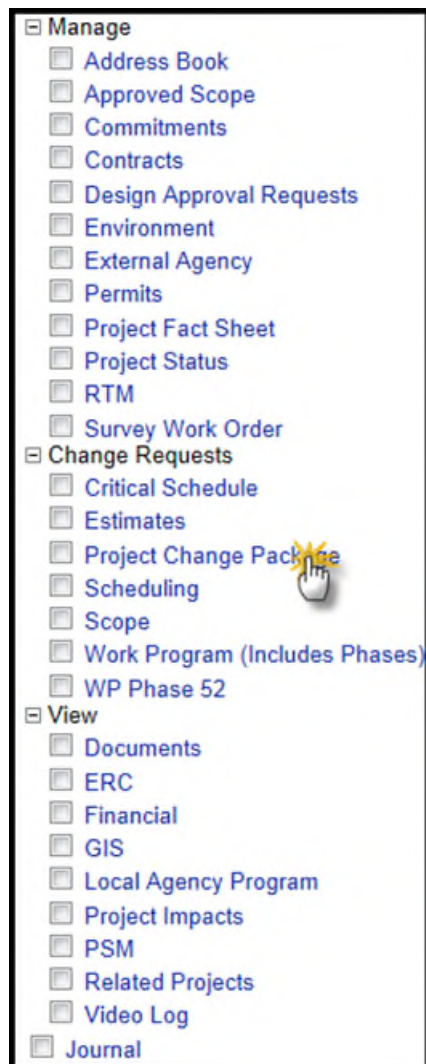
Requesting Privileges in the Project Change Package Module

As a PSEE User, you may request access/privilege to a specific activity within the Project Change Package 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 Project Change Package 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.
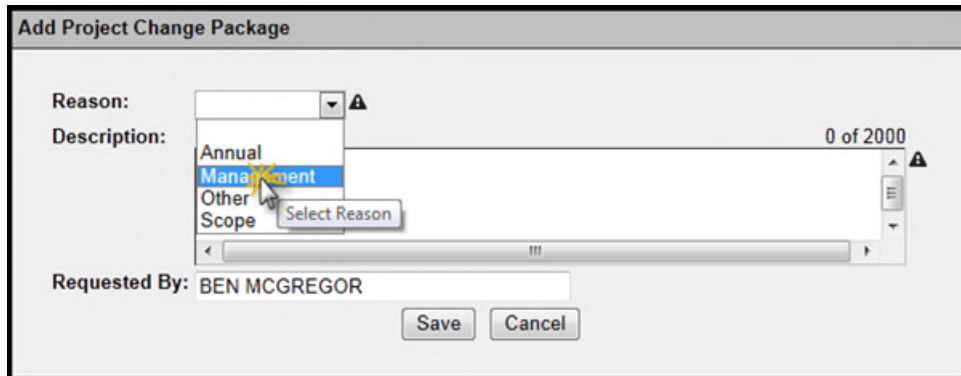
Creating a Project Change Package

To create a Project Change Package, follow these steps:

1. Click on the Add Project Change Package hyperlink. This will display a modal window.
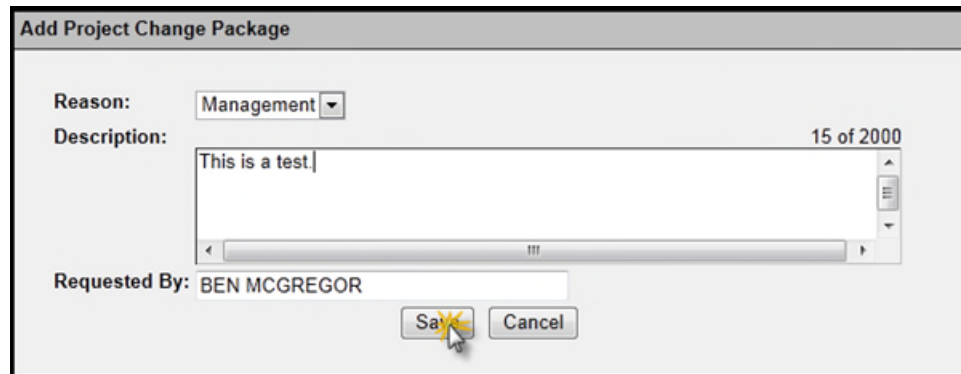

2. Select a Reason from the drop-down menu. This field is required.

3. If a Reason of "Other" is selected, the Other Reason Text field must be filled out.
4. Enter the description for this package in the provided text area. This field is required.
5. By default, the Requested By field will be populated with the current user. If another user requested this Package, begin typing their name in the text box, and select their name from the dropdown.
6. Click the Save button to create the Package, or the Cancel button to cancel the operation.
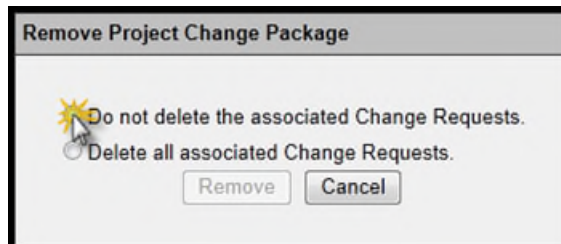
Removing a Project Change Package

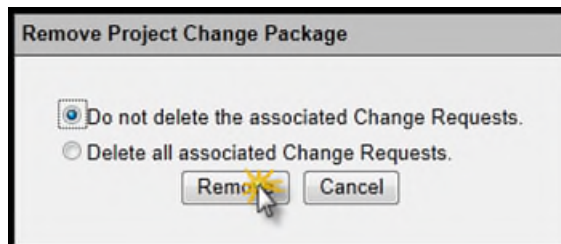To remove a Project Change Package, follow these steps:

1. Click on the Remove hyperlink next to the Project Change Package that you wish to remove. This will display a modal window.

2. Choose whether or not to delete the associated Change Requests with this package.

3. Click Remove to remove the Project Change Package, or Cancel to cancel this action.

It is important to note that a Project Change Package may only be removed if it is in the Draft Status. Once a package has been submitted, this option is no longer available.

Project Change Package Details

You may view the details of a Project Change Package by clicking the View hyperlink next to the desired Package in the list.
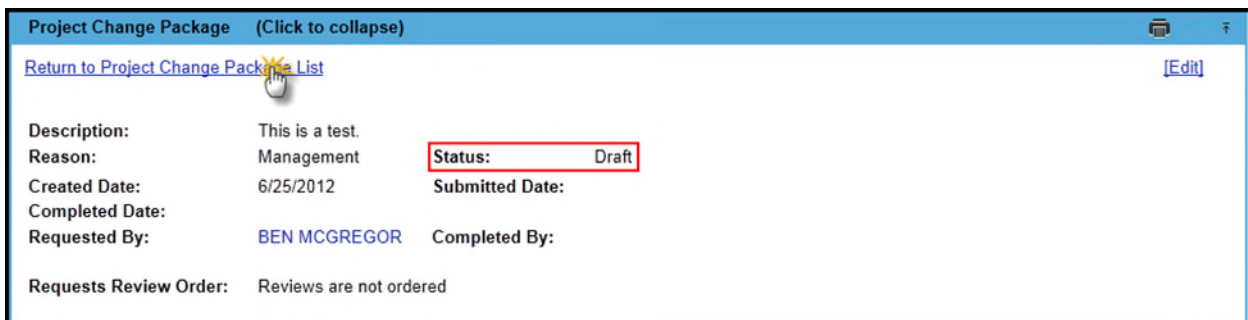

In addition to the Package's details, you will also see the associated requests and any supporting documentation. Note that if you just created this package, its Status will be set to **Draft**. To return to the list of Project Change Packages, click on the Return to Project Change Package List hyperlink in the top left corner of the module.
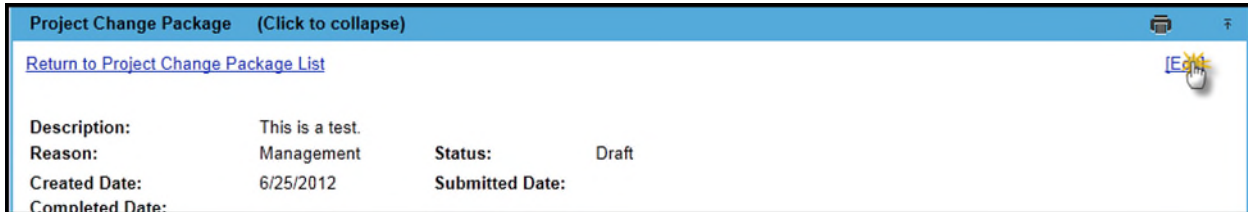
Editing a Project Change Package

You may edit the details of a given Project Change Package by clicking on the Edit hyperlink in the upper right corner of the module.

The displayed modal window will allow a user to update the Reason, Description, and Requesting User for a Package. Changes made may be saved by clicking the Save button or cancelled by clicking the Cancel button.
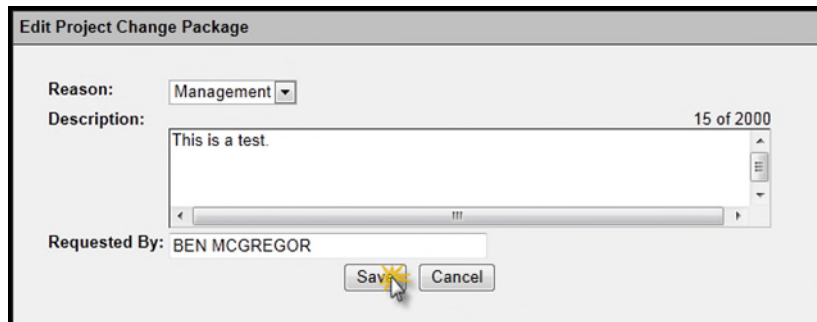
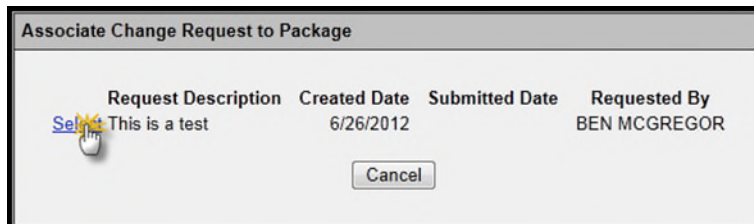## Associating a Change Request

Currently, one of any of three types of request may be associated with this package: Scope Change Requests, WP Phase 52 Change Requests, and Critical Schedule Change Requests. In order to associate one:

1. Create the Change Request(s). For more information on creating Change Requests, please read the Help Documentation for that particular Change Request. In this case, one of the following three types:
   - Scope Change Request
   - WP Phase 52 Change Request
   - Critical Schedule Change Request
2. Click on the Associate Change Request hyperlink in the appropriately labeled section. This will display a modal window.

3. If you have any of that particular type of Change Request in the **Draft** or **Revisions** status, they will appear in a list. Select the Request which you wish to associate with this package.

It is worth noting at this point that any requests associated with a Project Change Package cannot have their status changed manually. All status changes happen as a result of interaction with the Package by users with the correct Privilege(s) or Reviewers.

You will see that, after adding a Request, it has also been added to the Requests Review Order. When two or more Change Requests are associated with a Package, the order in which they are reviewed becomes important. When it is necessary to change the review order, follow these steps:

1. Click the Set Review Order hyperlink. This will open a modal window.

2. Select one of the associated Change Requests from the list and click either the **Move Up** hyperlink to move the selected Request up the order, or the **Move Down** hyperlink to move the Request down the order. The higher in the list a Request is, the earlier in the review order it is.

3. To save the new review order, click the **Save** button. If you wish to discard the changes, click the **Cancel** button.


You may, however, wish for there to be no order to the reviews. If this is the case, click on the Remove Review Order hyperlink to allow the Requests to be reviewed in any order.

Adding Project Change Package Documents

You may add any documents containing supporting details for this package in the PSEE Project Change Package Fields section. Keep in mind that these documents are separate from the documents for the individual Requests and should reflect support for the package as a whole, and not individual parts of the Package, while the Request documents should reflect support for their Request. To add a document to a Project Change Package, follow these steps:

1. When viewing the details of a Project Change Package, Click the Upload Document hyperlink. This will display a modal window.
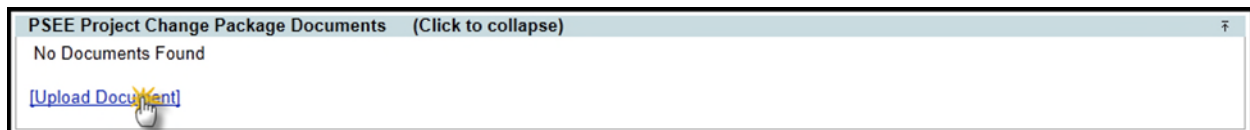

2. Click on the Select File button. This will display an Open window, from which you can select the document to be uploaded. This field is required.
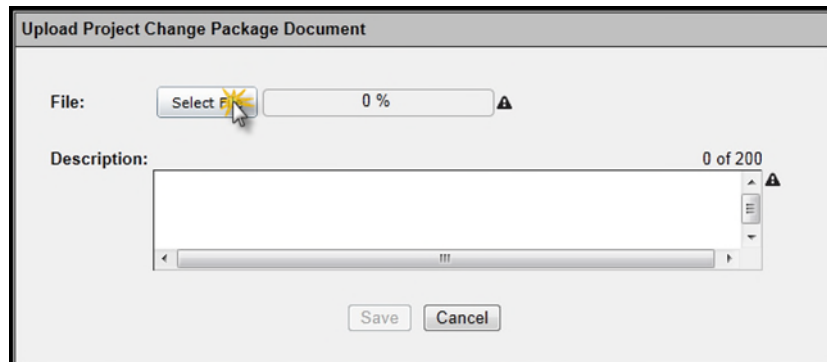

3. Enter a description for the document which is to be uploaded. This field is required.
4. To upload this document, click the **Save** button. To cancel this action, click the **Cancel** button.
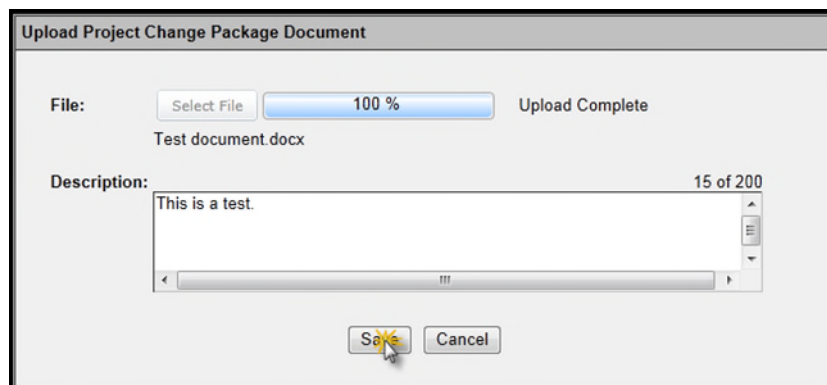
Documents may be sorted by clicking on the hyperlinked headers. The black triangle indicates the direction of the sort: pointing up indicates ascending and pointing down indicates descending. A document may be downloaded and viewed at any time. To view a document, click on the **View** hyperlink for that document. The document's details may be edited by clicking the **Edit** hyperlink to open the edit modal window, changing values, and clicking on the **Save** button.
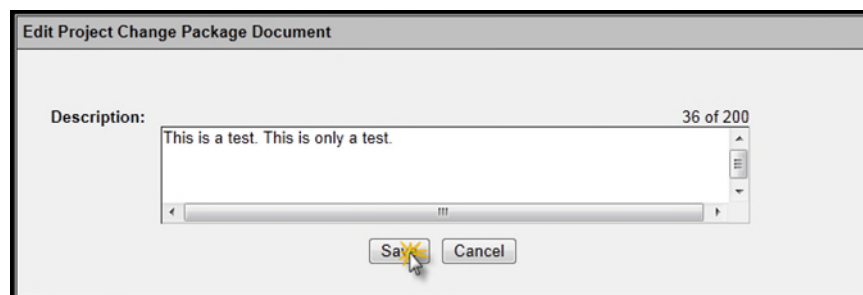
If a document is no longer necessary, it can be removed from the Package by clicking on the **Remove** hyperlink.
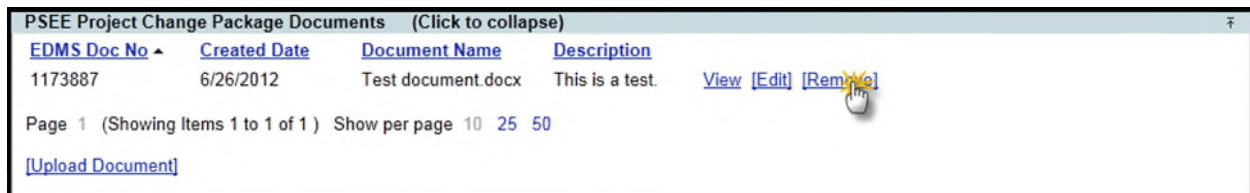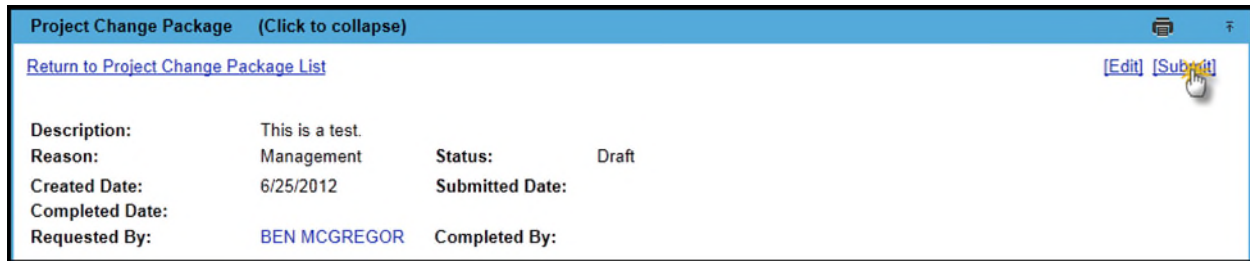

A confirmation will appear asking if the user is sure they want to delete the document. Click the **OK** button to delete the document, or the **Cancel** button to leave the document as-is.
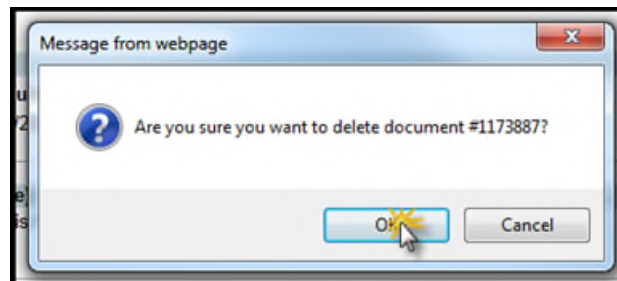
Submitting a Project Change Package

When the Change Package is set up satisfactorily, a user with the proper Permission may submit it to reviewers by clicking on the Submit hyperlink in the top right corner of the module.

Once submitted, the Status of the Package and all associated Requests will be set to **In Review**.

At this point, users will be unable to edit the Package or any of the associated Requests; however Documents may still be added to the Package or Requests. If any of the associated Requests are rejected, the status of the Package is set to Rejected, and the Package can either be revised or withdrawn.

Revising a Project Change Package

A Package may be revised in any status other than Draft or Revision. If revisions are required, a Privileged user may click the Revise hyperlink in the top right corner of the module.

This will set the Status of the Project Change Package and all associated Requests to Revision, allowing changes to be made as requested by the Reviewer(s). After these changes are made, the user may click the Submit hyperlink in the top right corner of the module to submit the package for review again.

Withdrawing a Project Change Package

A user with the proper Privilege may choose to withdraw a Project Change Package that is in any Status except for Withdrawn or Draft. To withdraw a Package, click on the Withdraw hyperlink in the top right corner of the module.

While a Package is withdrawn, no changes can be made to it. If changes are desired, a user may revise the Package by clicking on the Revise hyperlink in the top right corner of the module. Revising is handled the same way as stated above.

Approved and Completed Project Change Packages

When all reviewers for all associate Requests have approved the Requests, a Project Change Package is considered approved; the Status is then set to Approved. In the Approved Status, a package, and subsequently its associated Requests, may be withdrawn and/or revised as previously noted.

When all associated Change Requests have been completed, then the Project Change Package is likewise set as being completed. The Completed Date and Completed By fields will also be populated. As with the Approved Status, a Completed Project Change Package may be withdrawn and/or revised as needed.