The Project Scope Change Request Module

Contents

Requesting Privileges in the Scope Change Request Module

As a PSEE User, you may request access/privilege to a specific activity within the Scope 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 Scope 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 Scope Module

To access the Scope Module, select Scope under Change Requests in the Module Menu. The Scope module will be displayed.
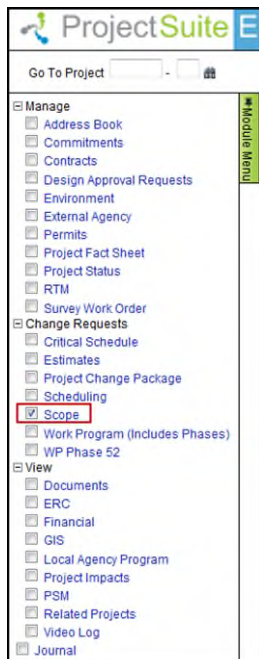
Viewing Current and Previously Approved Scope Information

Current and Previously Approved Scope Information is available to be viewed in the Scope Module. Until there are Approved Scopes created, there will be none to display. These subsections are read-only and appear under the Approved Scope module also. For more information on these sections, please read the Approved Scope Module Help Document.
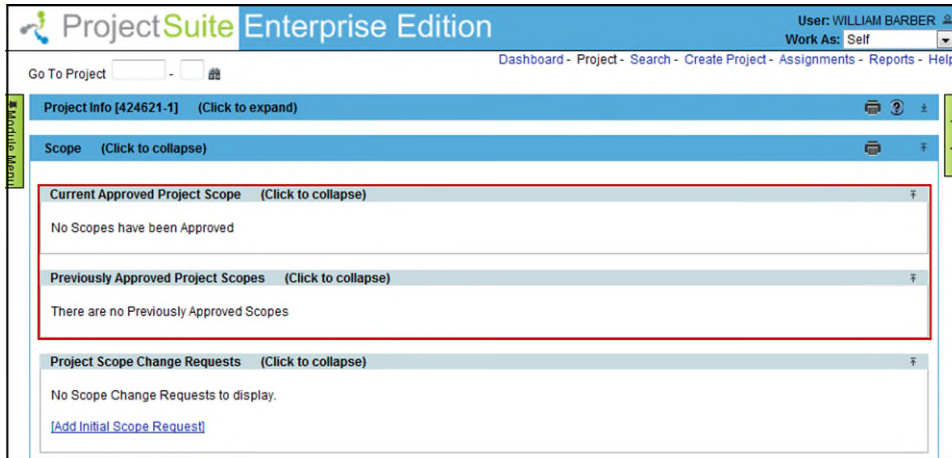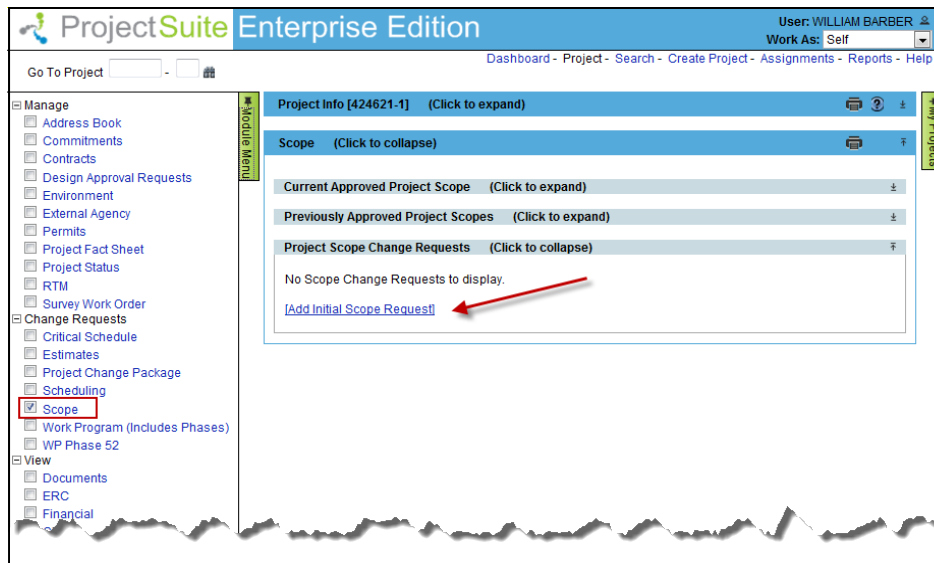

Creating an Scope Change Request

The Project Scope Change Requests module allows users to initiate a Scope Request and manage Scope Change Requests. Scope Change Requests must pass though a review by designated staff. Once the Request is approved, the Scope is updated in PSEE. All supporting documentation for the Scope Request or additional Scope Change Requests can be loaded into PSEE.

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

1. Select the **Add Initial Scope Request** hyperlink. A new window will appear.

2. Enter the details in the displayed "Add Scope Change Request" window.

   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 Scope Change Request.

- **Requested By [Required]**: Defaults to the PSEE user initiating the Scope Change Request, but can be changed to another internal user. 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 **not** established a Workflow for this Change Request Type, then the Change Request Workflow label and drop down is not displayed. Reference the District Administrators – Managing Change Request Workflow Help Document for more information on setting up the Change Request Workflows.

  If the District Administrator has established a Workflow for this Change Request Type, then the available list of named Workflows within that District will appear in the drop down and one can be selected. (Note: The drop down shows examples of unique names given to Scope Change Request Workflows.) By selecting a Change Request Workflow, the Scope Change Request will be assigned to the staff within the Workflow to perform a Review.

- **Scope Type:** Select Primary for the Initial Scope from the dropdown. Reference Scope Type: Primary or Alternate section for more information.

- **Scope Definition:** This is the area for entering a brief summary of the Scope and/or the justification for the Scope Change.

- **Scope Elements:** As Scope Elements are selected and moved to the right, a new area opens labeled with the specific Scope Element name. The new field is for supporting information to

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

4. The Scope Change Request is displayed. ***Note that the Scope Change Request is in a Draft Status. The Scope 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.

6. Enter changes and click on the Save button.

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 and no automatic assignments of Reviewers. The Change Request 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 Project Scope Change Request

When a Scope Change Request is created and a named Workflow is selected, the Reviewers in the Workflow are assigned to the Scope Change Request. 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 a Scope Change Request. Staff with a Review Assignment has a "vote" in the outcome of the Review. The Scope 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 Scope Change 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. Select the correct person from the list.

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 Scope 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 Scope Change Request

Supporting documents may be attached to the Scope Change Requests.

1. From the PSEE Scope 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.

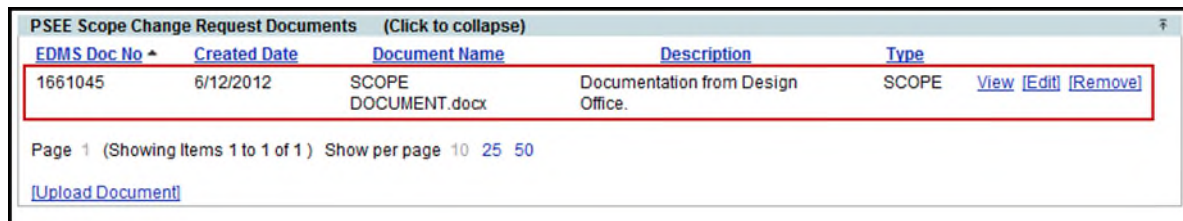3. The document appears in the list. Attached documents can be managed from this list. From the list, you can View, Edit or Remove the document.

- 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 Scope Change Request. You will be prompted with a confirmation dialog box. Select **OK** to remove the document or **Cancel** to retain it.
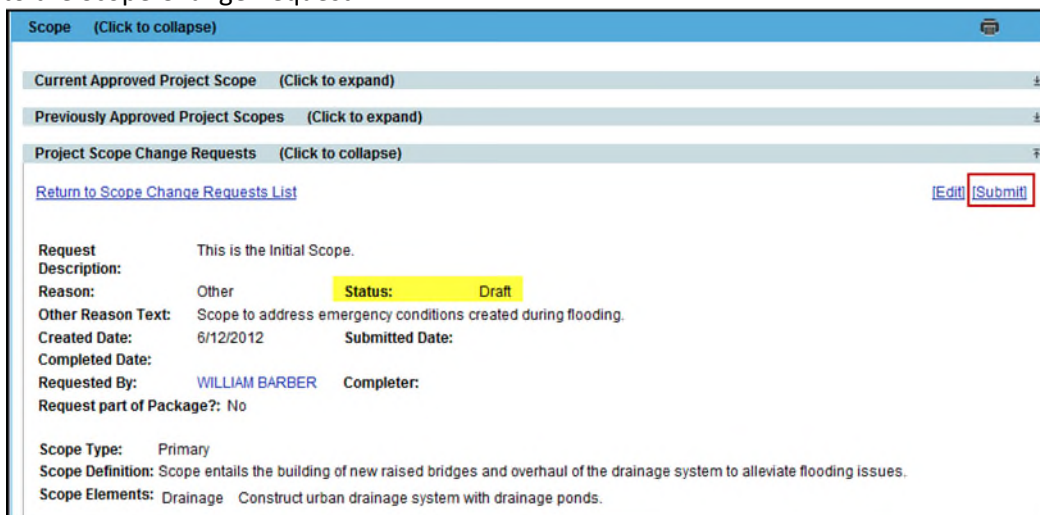
Submitting a Scope Change Request

Once all information has been entered, a Scope Change Request must be submitted to begin the review process.
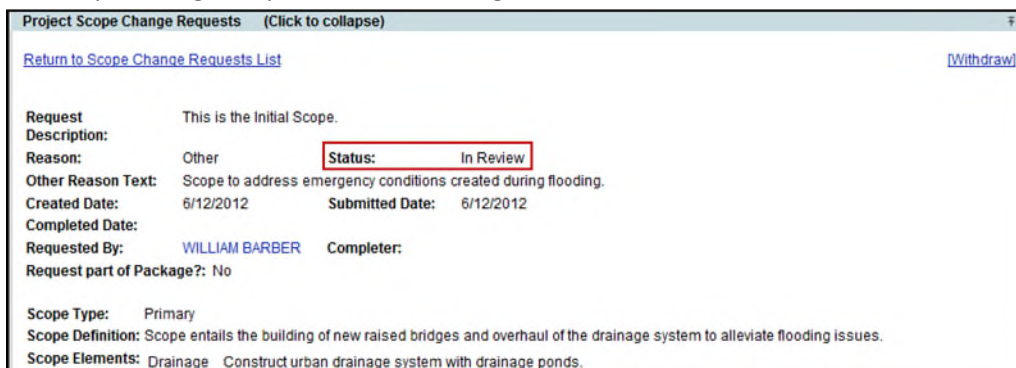
1. If you are accessing the Scope Change Request in the Scope Module in PSEE, select **View** to see the details of the Scope Change Request.
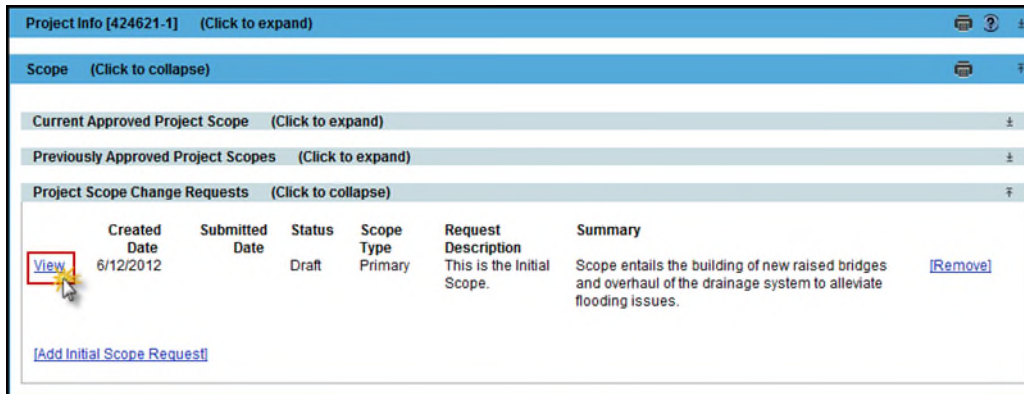
2. Select the **Submit** hyperlink. Note: The Submit will not be allowed unless there are Reviewers assigned to the Scope Change Request.

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

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

Reviewer Assignment	Order	Reviewer	Status	Completed Date
⊞	1	RICHARD NORRIS	In Review	
⊞	2	ERICA HEWETT	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 Scope Change Request Assignment By: WILLIAM BARBER (RD352BW)

FDOT-PSEE-System@dot.state.fl.us

Tuesday, June 12, 2012 4:59 PM

From: WILLIAM.BARBER@DOT.MYFLORIDA.COM

Recipients: RICHARD.NORRIS@DOT.MYFLORIDA.COM,

Click to see the referenced Project in PSEE

Change Request Assignment

Reviewer: RICHARD NORRIS
Order: 1
Status: In Review
Status Date: 6/12/2012
Assigned Date: 6/12/2012
Comment:

Reviewer Assignment Comments

1. The Reviewer Assignee may click on the **Status Update** hyperlink to enter any Comments related to the Scope 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 notify the next Reviewer to complete her review.

4. Once the last Reviewer approves and there are no more Reviewer Assignments, the Change Request status will be set to Completed. The Completer's name is entered.

Project Scope Change Requests   (Click to collapse)

Return to Scope Change Requests List

Request Description:	This is the Initial Scope.
Reason:	Other **Status:** Completed
Other Reason Text:	Scope to address emergency conditions created during flooding.
Created Date:	6/12/2012 **Submitted Date:** 6/13/2012
Completed Date:	6/13/2012
Requested By:	WILLIAM BARBER **Completer:** ERICA HEWETT
Request part of Package?:	No

Scope Type: Primary
Scope Definition: Scope entails the building of new raised bridges and overhaul of the drainage system to alleviate flooding issues.
Scope Elements: Drainage   Construct urban drainage system with drainage ponds.

Reviewer Assignment   (Click to collapse)

	Order	Reviewer	Status	Completed Date
⊞	1	RICHARD NORRIS	Approved	6/13/2012
⊞	2	ERICA HEWETT	Approved	6/13/2012

Request Changes to the Scope Change Request

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

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

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.

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

The Withdraw Of the Scope Change Request

A Scope Change Request may be withdrawn if it is determined that it is no longer needed.

Once a Scope 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 Scope Change Request* privilege.

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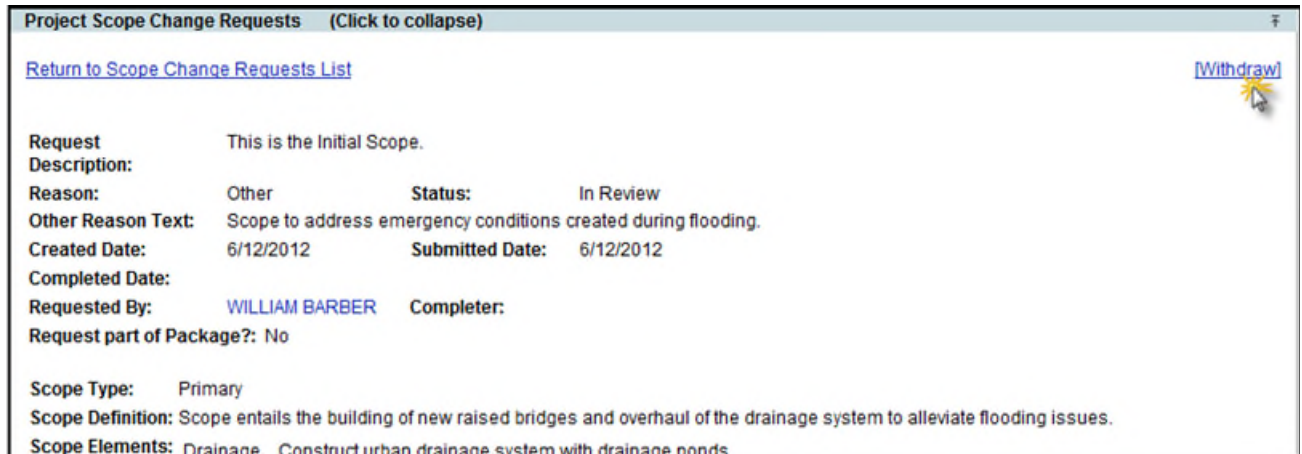
2. There is a confirmation that asks "Are you sure you want to Withdraw this Change Request? This action cannot be undone." Click OK to proceed with the withdrawal of the Change Request.
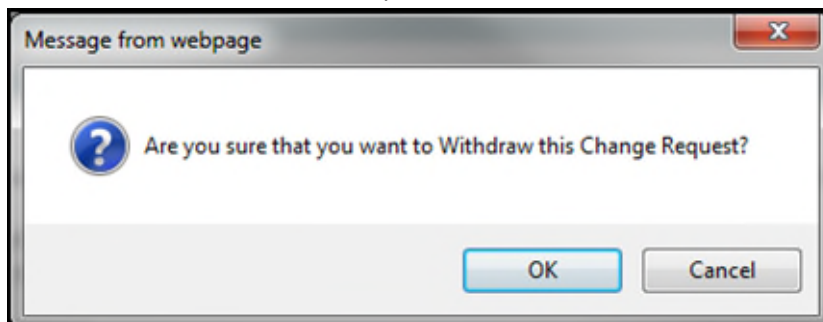
Revision of the Scope Change Request

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

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

1. Select the Revise hyperlink.

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

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

Setting the Scope Locked Date

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

The Scope Locked Date is a way to lock a Project so that no new Scope Change Requests can be created and no Scope 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 Scope Change Requests that are in a Status of **In Review** or **Approved** from being completed.

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

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

3. The Locked Through Date is displayed. The Lock Scope Requests hyperlink is no longer displayed until the Locked Through Date is past.

4. If the date needs to change, click on the **Update the Scope Locked Through Date** hyperlink. Adjust date and click on Save.
5. If the Date needs to be unlocked, click on the **Unlock Project Scope** hyperlink and lock is removed.

Add Scope Change Requests

Note: After an Initial Scope is established, the User with the *Mange Scope Change Request* privilege will no longer have the **Add Initial Scope Request** hyperlink displayed. The **Add Scope Change Request** hyperlink will display.

1. Select the **Add Scope Change Request** hyperlink. A new window will appear.

2. The Change Request **Reason** and the Change **Request Description** are required fields for the new Scope Change Request. The other information is prefilled with the Scope information from the last Primary Scope in a Completed Status. This allows the Scope change to be precise.
3. Select Save to add the new Scope Change Request.

Show Changes

After a new Scope Change Request is created and is in a status of Draft or In Review, it can be selected by clicking on the **View** hyperlink to bring up the Scope Change Request.

1. Click on the **Show Changes** hyperlink.
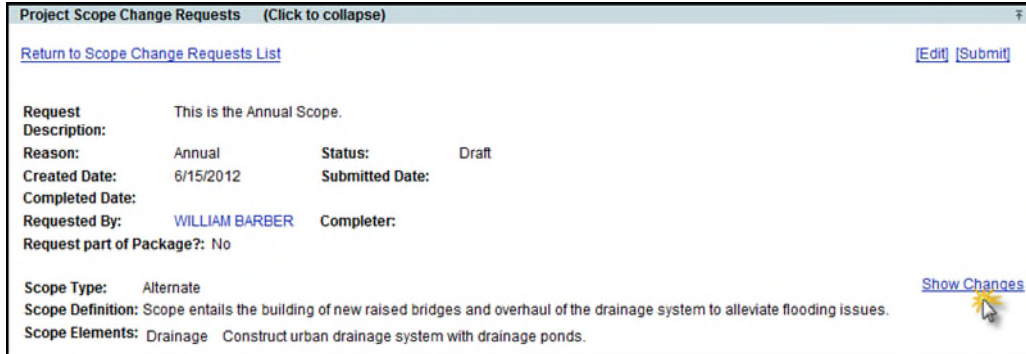
2. This will bring up the Current Project Scope and the Proposed Change Request for a side by side comparison.

3. Click on the Close button when viewing is complete. A Scope Change Request in a status of Draft can be edited if change to the Scope Change Request is needed.

Scope Type: Primary or Alternate

The User with the *Mange Scope Change Request* privilege will display the **Add Initial Scope Request** hyperlink until an Initial Scope is created. The **Add Scope Change Request** hyperlink will display for all subsequent Scope Change Requests. Each of these links will bring up a new window called **Add Scope Change Request** where a **Primary** or **Alternate** Scope Type is selected.

While in most cases the Initial Scope would be created as a Primary Scope, PSEE will allow an Initial Scope to be created as an Alternate Scope.

Business Rules:

1. An Alternate Scope must be in a status of Draft to be changed into a Primary Scope.
2. When an Alternate Scope is changed to a Primary Scope, the Scope must go through a complete review process with all the Reviewers assigned.
3. The can be only one Current Primary Scope in a status of Completed.