



# **WORK PROGRAM UPDATE CYCLE USER GUIDE**

## **WPUC USER GUIDE**



## **Guidelines for revising this document**

This document is prepared using Microsoft Word. The Arial 10 point font is used. Features of Word can be used to automatically maintain section numbers, table and figure numbers, and fields for information that appears frequently throughout the document.

In this paragraph, fields are set for the organization name, ORGNAME (for example, Florida Department of Transportation), the organization acronym, ORGINIT (for example, FDOT ), and the project or product name, PROJ (for example, PSEE Work Program Update Cycle), project initials, PROJINIT (in this case, Appendix 2), and product release, REL (for example 1.0.00). All occurrences of these strings in this document should be inserted as fields. These are currently set to Florida Department of Transportation, (FDOT ), PSEE Work Program Update Cycle (Appendix 2)

# Table of contents

<b>Table of contents</b> .....	<b>iv</b>
<b>1 Introduction</b> .....	<b>1-1</b>
1.1 Background.....	1-1
1.2 Audience.....	1-1
<b>2 Yearly Update List</b> .....	<b>2-2</b>
2.1 Generating the Yearly Update List.....	2-2
2.1.1 Publishing and Un-publishing Projects .....	2-4
2.1.2 Managing the list.....	2-6
<b>3 Getting Started in WPUC</b> .....	<b>3-1</b>
3.1 WPUC Project List .....	3-1
3.1.1 Sorting and filtering.....	3-1
3.1.2 Using Shortcut Keys .....	3-3
3.1.3 General WPUC Screen Information.....	3-3
<b>4 Creating a Change Request Package</b> .....	<b>4-5</b>
4.1 Creating a package from WPUC.....	4-5
4.1.1 Change Management Console (CMC).....	4-5
4.1.2 Updating a workflow .....	4-10
4.1.3 Submitting a CR Package.....	4-11
4.2 Creating a package from PSEE Project Details .....	4-12
4.2.1 Adding the CR modules .....	4-12
4.2.2 Viewing historical change requests.....	4-14
4.2.3 Creating a change request .....	4-15
<b>5 Review Process</b> .....	<b>5-17</b>
5.1 Reviewing a Change Request .....	5-17
5.1.1 Manager assigned vs. self-assigned.....	5-17
5.1.2 Scope Review.....	5-19
5.1.3 Estimate Review .....	5-21
5.1.4 Critical Dates (Schedule) Review .....	5-22
5.1.5 WPA Complete Review .....	5-24
5.2 Requesting clarification.....	5-26
5.3 Restarting a package.....	5-28
5.3.1 Resubmitting a restarted package .....	5-30

5.3.2	Viewing the package history .....	5-30
5.3.3	Viewing the workflow sequence.....	5-31
<b>6</b>	<b>Appendix 1: Definitions, acronyms and abbreviations.....</b>	<b>6-1</b>
<b>7</b>	<b>Appendix 2: Yearly Update List logic .....</b>	<b>7-2</b>

## List of figures

---

Figure 1	PSEE Top Link Menu .....	2-2
Figure 2	Yearly Update List screen .....	2-3
Figure 3	Filtering the Yearly Update List .....	2-3
Figure 4	Publishing projects .....	2-4
Figure 5	Unpublishing projects .....	2-5
Figure 6	Add a project search window.....	2-6
Figure 7	Add a project search results .....	2-7
Figure 8	Remove project from YUL .....	2-8
Figure 9	Updating a project due date .....	2-9
Figure 10	Exporting YUL to Excel.....	2-10
Figure 11	Filtering the project list.....	3-2
Figure 12	Project list filtering tabs.....	3-2
Figure 13	Tab filtered view .....	3-2
Figure 14	WPUC Screen .....	3-3
Figure 15	Change Management Console.....	4-6
Figure 16	Phase 52 CR.....	4-7
Figure 17	Scope of Work CR.....	4-8
Figure 18	Critical Schedule CR .....	4-10
Figure 19	Modifying a workflow .....	4-11
Figure 20	Submitting the CR Package .....	4-12
Figure 21	Scope CR history .....	4-14
Figure 22	Historical change request details.....	4-14
Figure 23	WPUC single package mode.....	4-15
Figure 24	Creating a new CR from PSEE .....	4-16
Figure 25	Scope of Work CR Approval.....	5-19

Figure 26 SOW Window ..... 5-20

Figure 27 Phase 52 (Estimate) CR Approval..... 5-22

Figure 28 Critical Dates CR Approval..... 5-23

Figure 29 Critical Schedule window..... 5-23

Figure 30 WPA Completion ..... 5-24

Figure 31 request clarification..... 5-26

Figure 32 Responding to a clarification request..... 5-27

Figure 33 Clarification notes history ..... 5-28

Figure 34 Restarting a package..... 5-29

Figure 35 Resubmitting a restarted package..... 5-30

Figure 36 Change request package history ..... 5-31

Figure 37 Viewing the workflow sequence ..... 5-31

Figure 38 Workflow sequence details..... 5-32

Figure 39 Viewing reviewer notes..... 5-32

## 1.1 Background

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The PSEE Work Program Update Cycle (Appendix 2) manages the process of submitting construction estimates in support of the Work Program Update. It focuses on managing changes to estimates in support of the annual Work Program Update Cycle for Phase 52 as well as handling the relationships between scope, schedule and Work Program Phase 52 changes.

## 1.2 Audience

---

This User Guide is intended for FDOT personnel who are users and administrators of the Appendix 2. This Guide assumes that the user is familiar with the business rules, process and documents involved with the Appendix 2.

It assumes that the user is familiar with the basic operation of desktop/laptop computer equipment including powering on and off, using the keyboard and mouse, establishing a session, navigating Microsoft® Windows®<sup>1</sup> and browsing the Internet. Instruction in these areas is not in the scope of this guide.

When the guide refers to tapping on a button or link, you should tap on the screen unless otherwise indicated.

This document contains hyperlinks to allow easy navigation to topics and references. Click any items formatted with [underline and blue text](#) to jump to the referenced location.

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<sup>1</sup> Microsoft, Windows, Excel, and Internet Explorer are registered trademarks of Microsoft Corporation

## 2 Yearly Update List

The Yearly Update List is produced by the District Estimates Office and is used to produce a list of projects that require an update in the FM system. To produce this list, users must have rights to the module. Rights are given by the District PSEE Administrators or the Functional Application Coordinators.



Figure 1 PSEE Top Link Menu

### 2.1 Generating the Yearly Update List

Only the users with access to the Yearly Update List (YUL) module will be able to see the Yearly Update List tab. The list is generated based on built in logic. Please see [Appendix 2](#) for the Yearly Update List logic.

To generate the list follow the steps below.

1. Click the “Yearly Update List” tab. The default year will be the next fiscal year.
2. Click the “Generate Yearly Estimate Update List” button
3. Enter a default Due Date (a default date is required but can be changed later).
4. Verify the Managing District is the correct District and click GO

The Yearly Update List is generated and all of the projects requiring an update are listed. The list consists of the following columns:

- Project Number
- Description
- Phase 52 Amount
- Updated Due Date
- Status
- Project Manager
- Work Mix
- FY of Letting
- Letting Date
- Contract Class



Yearly Update List menu bar

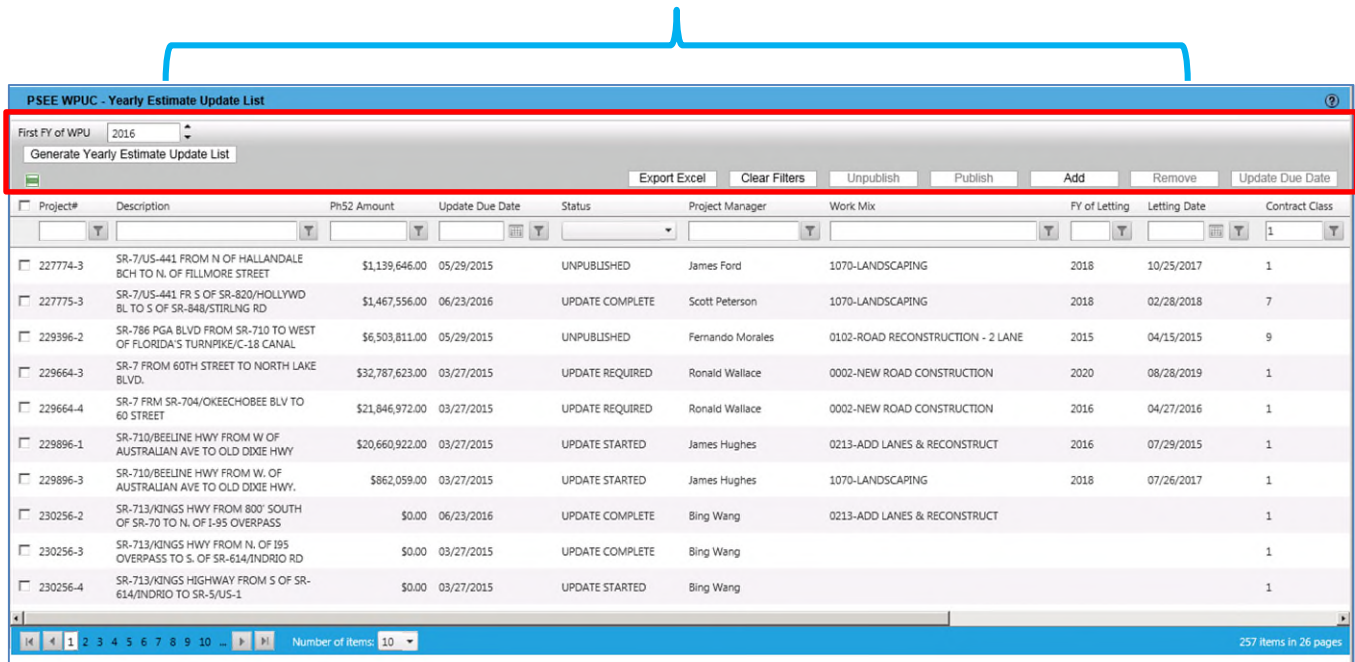


Figure 2 Yearly Update List screen

Sorting is available by clicking the column heading of any of the columns. Users can also filter by entering a filter criteria and selecting one of the filter options as shown below. To clear all filters, select the “Clear Filters” button located in the Yearly Update List menu bar (Figure 2)

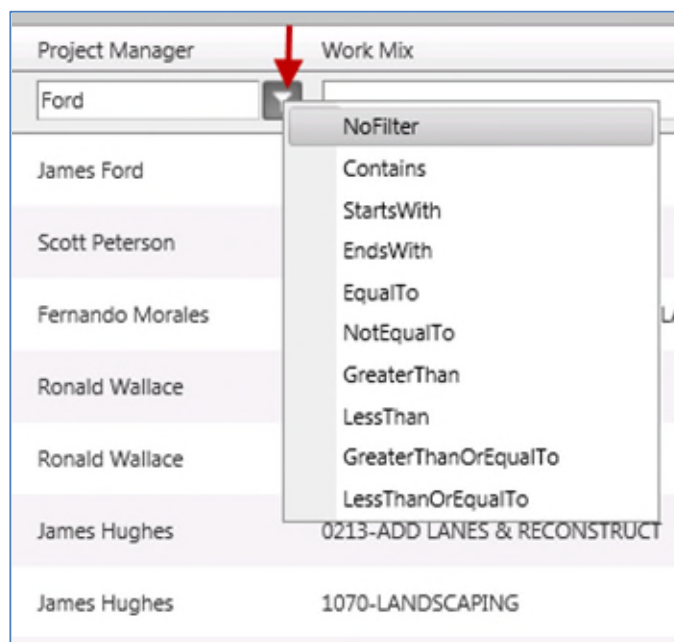



Figure 3 Filtering the Yearly Update List

## 2.1.1 Publishing and Un-publishing Projects

### 2.1.1.1 Publishing

When the list is generated all of the projects have a status of “Unpublished”. Before projects are available for updating in WPUC they must first be published. To publish a project(s) select it from the Yearly Update List. Several projects can be selected at a time by clicking in the square next to the project number. Users can also select all of the projects on the page by selecting the square next to the Project number column heading (highlighted below). At the bottom the number of projects selected is displayed.

 **Note: If you are unable to publish a project that has a status of “Unpublished” it may be that the project has an existing change request that has not been completed.**

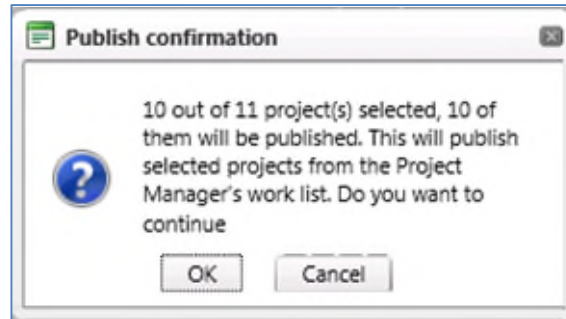
<input checked="" type="checkbox"/> Project#	Description	Ph52 Amount	Update Due Date	Status
<input type="checkbox"/>				UNPUBLISHED
<input checked="" type="checkbox"/> 227774-3	SR-7/US-441 FROM N OF HALLANDALE BCH TO N. OF FILLMORE STREET	\$1,139,646.00	05/29/2015	UNPUBLISHED
<input checked="" type="checkbox"/> 229396-2	SR-786 PGA BLVD FROM SR-710 TO WEST OF FLORIDA'S TURNPIKE/C-18 CANAL	\$6,503,811.00	05/29/2015	UNPUBLISHED
<input checked="" type="checkbox"/> 230256-6	SR-713/KINGS HWY FR 500' S OF SR-70 TO N OF PICOS ROAD	\$21,740,783.00	08/14/2016	UNPUBLISHED
<input checked="" type="checkbox"/> 230256-7	SR-713/KINGS HWY FROM NORTH OF PICOS RD TO NORTH OF I-95 OVERPASS	\$13,135,258.00	08/14/2016	UNPUBLISHED
<input checked="" type="checkbox"/> 230256-9	SR-713/KING'S HWY FR 800' S OF SR-70 TO N OF PICOS RD	\$4,606,687.00	08/14/2016	UNPUBLISHED
<input checked="" type="checkbox"/> 233166-2	SR-808/GLADES ROAD FROM SR-7 TO SR-5/US-1	\$1,419,613.00	02/08/2015	UNPUBLISHED
<input checked="" type="checkbox"/> 427937-1	SR-7/US-441 FROM SR-834/SAMPLE ROAD TO BROWARD/PB COUNTYLINE	\$11,625,714.00	06/30/2015	UNPUBLISHED
<input checked="" type="checkbox"/> 429936-1	SR-A1A NORTH BRIDGE OVER ICWW BRIDGE #940045	\$1,392,471.00	04/30/2015	UNPUBLISHED
<input checked="" type="checkbox"/> 430567-1	SR-80 BRDG# 930354, & 930355 REMOVE & REPLACE LIFT OUT SPAN	\$2,464,049.00	04/30/2015	UNPUBLISHED

Number of items: 10

**10 out of 11 project(s) selected - 90.91 %**


Figure 4 Publishing projects

Once the desired projects have been selected, click the “Publish” button located on the menu bar (Figure 2). A confirmation message pops up stating the number of projects to be published. Click “OK” to continue or cancel to stop.



### 2.1.1.2 Unpublishing

In the same way a project can be published, it can also be unpublished.

 **Note: Only projects with a status of “Update Required” can be unpublished.**

To unpublish a project, select the desired project(s) from the list. Multiple projects can be selected here also. Once the project(s) that will be unpublished have been click the “Unpublish” button located on the menu bar.

Figure 5 Unpublishing projects

## 2.1.2 Managing the list

There are other functions available within the Yearly Update List. Users can add projects that are not on the list as well as remove existing projects. Another function available is the option to update the due date. This date was set when the list was generated but can be updated on an “as needed” basis.

### 2.1.2.1 Adding projects

Users may have the need to add a project to the Yearly Update List that was not automatically added when the list was generated. Projects can be added to the Yearly Update list directly from the module. To add a project select “Add” from the menu bar. Clicking this button invokes the search screen. From here users can search for the project to be added to the list.

Select the criteria to search for a specific project. Once all of the information has been entered, click “search”.

The screenshot shows a 'Search projects' dialog box with the following fields and options:

- Project:** [ ] - [ ]
- Active Status:** Active
- Item Segment Group:** All
- Transportation System:** All
- Projects With PSEE PM:**
- Without Permits:**
- PSEE Project Manager:** [ ]
- WP Project Manager:** [ ]
- Description / Item Seg. Comments:** [ ]
- Contract Number:** [ ]
- Local Agency:** All
- Fund Code:** All
- Phase Grouping:** All
- Fiscal Year:** From [ ] To [ ] (YYYY)
- Search Criteria:**
  - Contains (selected), Starts With, Exact
  - Contains (selected), Starts With, Exact
  - Contains (selected), Starts With, Exact
- Status:**
  - All
  - 00000000 - Candidate Line Item
  - 00000003 - Dropped/Transferred
  - 00000005 - Adopted, Not Begun
- Contract Class:**
  - All
  - 1 - TO BE LET
  - 2 - EXTERN MNGD(NOT LAP)
  - 3 - STUDIES
- Work Mix:**
  - All
  - 0002 - NEW ROAD CONSTRUCTION
  - 0004 - HWY-RECONSTRUCTION
  - 0005 - FLEXIBLE PAVEMENT RECONSTRUCT
- Only Safety Projects:**
- Buttons:** Search, Cancel

Figure 6 Add a project search window

A list of projects meeting the selected criteria will be displayed, as shown in [Figure 7](#). From here, select the projects that will be added to the YUL. Enter a new due date and click the “Add to Yearly Update Project List” button. Once it is complete a confirmation message will display showing the number of projects that were added to the list.

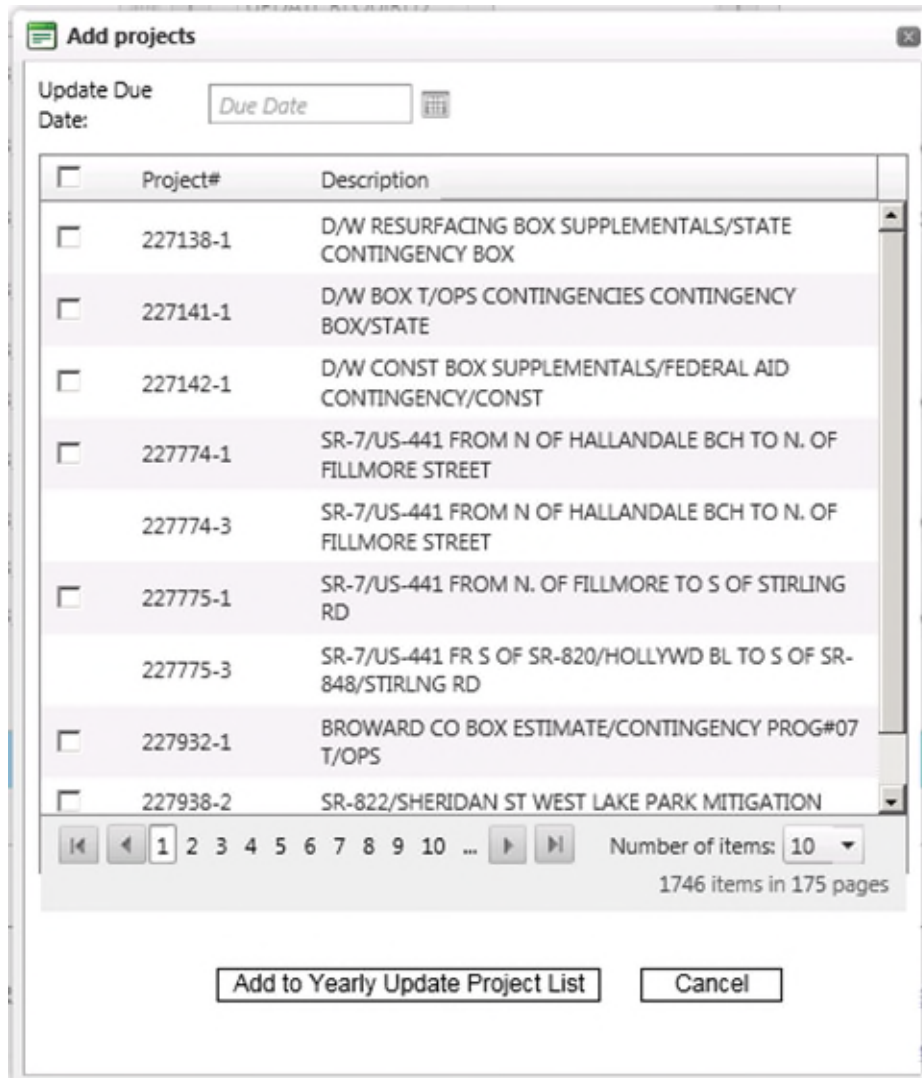


Figure 7 Add a project search results

### 2.1.2.2 Removing projects

To remove a project from the Yearly Update List select the project(s) from the list that are to be removed and click the “Remove” button from the YUL menu bar.

 **Note: Only projects with a status of “Unpublished” can be removed.**

A warning message will pop up where users can click “OK” to confirm and remove the project or “Cancel” to void the transaction and keep the project on the list.

## YEARLY UPDATE LIST

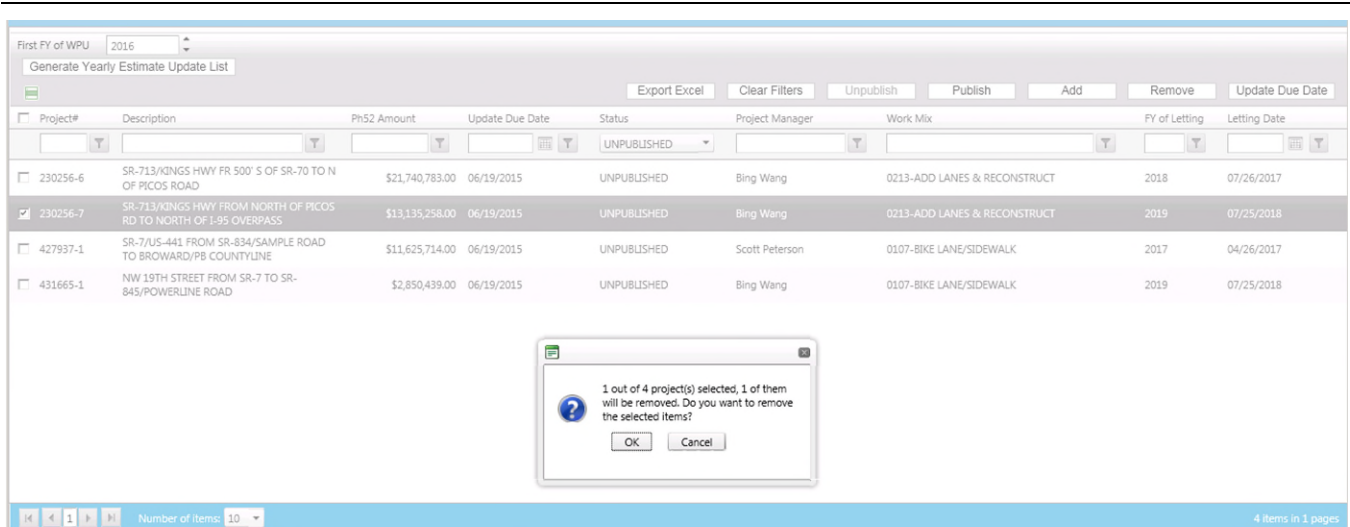
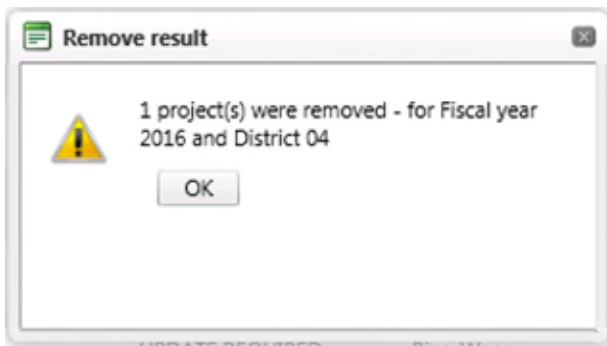


Figure 8 Remove project from YUL



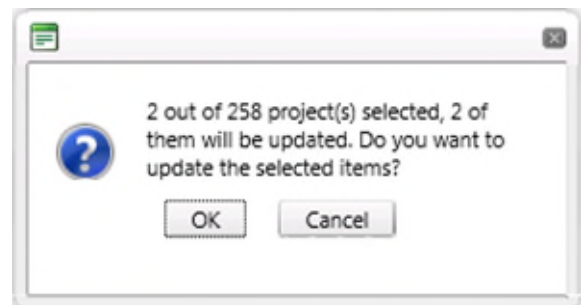
Once "OK" is clicked, a confirmation box will pop up notifying the user that the project was removed from the list. It also confirms the fiscal year for which it was removed as well as the district.

### 2.1.2.3 Updating the due date

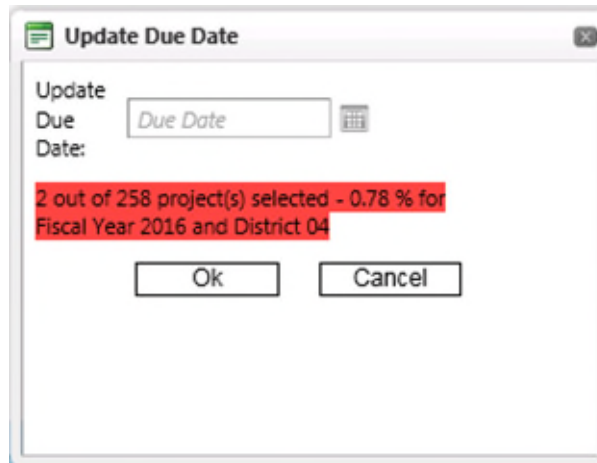
Before projects are published, project due dates can be updated as needed. Due dates can be updated for one or more projects. Using the filter/sorting options users can narrow down the project list and select the projects that need updating.

To update the due date, select the project(s) from the list. Like adding and removing, multiple projects can be selected at once. After selecting the projects from the list, select the "Update Due Date" button from the YUL menu bar.

A pop up will appear letting users know that the due date will be changed for the selected number of projects. Click "OK" to proceed or "Cancel" to stop the command.



When “OK” is selected, a second box will appear where a new due date can be entered. The date can be either manually entered or selected from the calendar by clicking the calendar icon. Once the desired date is entered click “OK” to complete the process. Clicking cancel will stop the process and the project’s due date will stay the same as it was.



*Figure 9 Updating a project due date*

#### **2.1.2.4 Exporting to Excel**

The Yearly Update list can be exported to Excel. To export the list click the “Export Excel” button. A prompt will pop up asking to save or open the file. Select “save as” and select a location to save the file. Once the export is complete, the list can be opened in Excel.

YEARLY UPDATE LIST

**PSEE WPUC - Yearly Estimate Update List**

First FY of WPU: 2016

Generate Yearly Estimate Update List

Export Excel Clear Filters Unpublish Publish Add Remove Update Due Date

Project#	Description	Ph52 Amount	Update Due Date	Status	Project Manager	Work Mix	FY of Letting	Letting Date	Contract Class
<input type="checkbox"/> 227138-1	D/W RESURFACING BOX SUPPLEMENTALS/STATE CONTINGENCY BOX	\$9,207,109.00	08/31/2016	UPDATE REQUIRED	Antonette Adams	0041-FUNDING ACTION	2015		8
<input type="checkbox"/> 227141-1	D/W BOX T/OPS CONTINGENCIES CONTINGENCY BOX/STATE	\$10,056.00	08/31/2016	UPDATE REQUIRED	Antonette Adams	0717-TRAFFIC CONTROL DEVICES/SYSTEM	2015		8
<input type="checkbox"/> 227142-1	D/W CONST BOX SUPPLEMENTALS/FEDERAL AID CONTINGENCY/CONST	\$55,834,603.00	08/31/2016	UPDATE REQUIRED	Antonette Adams	0041-FUNDING ACTION	2015		8
<input type="checkbox"/> 227774-1	SR-7/US-441 FROM N OF HALLANDALE BCH TO N. OF FILLMORE STREET	\$27,160,269.00	08/31/2016	UNPUBLISHED	James Ford	0213-ADD LANES & RECONSTRUCT	2014		1
<input type="checkbox"/> 227774-3	SR-7/US-441 FROM N OF HALLANDALE BCH TO N. OF FILLMORE STREET	\$1,139,646.00	05/29/2015	UNPUBLISHED	James Ford	1070-LANDSCAPING	2018	10/25/2017	1
<input type="checkbox"/> 227775-1	SR-7/US-441 FROM N. OF FILLMORE TO S OF STIRLING RD	\$25,017,601.00	08/31/2016	UNPUBLISHED	Scott Peterson	0213-ADD LANES & RECONSTRUCT	2014		9
<input type="checkbox"/> 227775-3	SR-7/US-441 FR S OF SR-820/HOLLYWD BL TO S OF SR-848/STIRLING RD	\$1,467,556.00	06/23/2016	UPDATE COMPLETE	Scott Peterson	1070-LANDSCAPING	2018	02/28/2018	7
<input type="checkbox"/> 227932-1	BROWARD CO BOX ESTIMATE/CONTINGENCY PROG#07 T/OPS	\$415,000.00	08/31/2016	UPDATE REQUIRED	Antonette Adams	0041-FUNDING ACTION	2015		8
	SR-786 PGA BLVD FROM SR-710 TO								

Number of items: 10 263 items in 27 pages

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**FLORIDA DEPARTMENT OF TRANSPORTATION**  
 Report PSEE questions to your District Admin(s): [Pablo Salazar](#), [Stacy Miller](#), [Miro Poss](#)  
 Documents included in PSEE use FDOT standard desktop software.  
 Report Technical Problems to the Service Desk @ 1-866-955-4357 (HELP) or e-mail: [Service Desk](#)

Do you want to open or save YearlyList.xlsx from tibstws.dot.state.fl.us? Open Save Save as Save and open

Figure 10 Exporting YUL to Excel



## 3 Getting Started in WPUC

### 3.1 WPUC Project List

The Project Manager is responsible for updating their projects yearly. It is possible that nothing has changed on a project and it just needs a yearly update. However, the Project Managers should carefully review their projects for needed scope or critical schedule changes. Click the WPUC Project List tab to access the projects that require a yearly update.



The list of projects requiring an update is displayed. The list consist of the following columns:

- Project number- displays the FM number.
- Project description- displays the PSEE project description.
- Work Mix- Displays the work mix type.
- Fiscal year of letting- Displays the fiscal year of letting.
- Phase 52 amount- displays the current amount of the Phase 52.
- Update due date- display's when the update is due.
- Reviewer- displays the current reviewer (whose court the package is in).
- Status- displays the status of the review.
- Step- displays in which step of the workflow the package is currently in.
- Project Manager- displays the project manager's name.
- Last update- displays when the change request package was last updated
- Letting dated- displays the project's letting date.
- Created- displays when the change request package was created.
- Completed- displays when the updated was completed.
- Federal- displays whether a project is federally funded or not.

#### 3.1.1 Sorting and filtering

Sorting is available by clicking the column heading of any of the columns. Users can also filter by entering a filter criteria and selecting one of the filter options as shown below. For example,

to filter by a specific FY of letting, enter the desired year and select “Contains” from the filtering options. This will display all of the projects with that specific letting year. This feature can be used in the “Project #” column to search for a specific project as well. To clear all filters, select the “Clear Filters” button located above the project list columns on the right hand side.

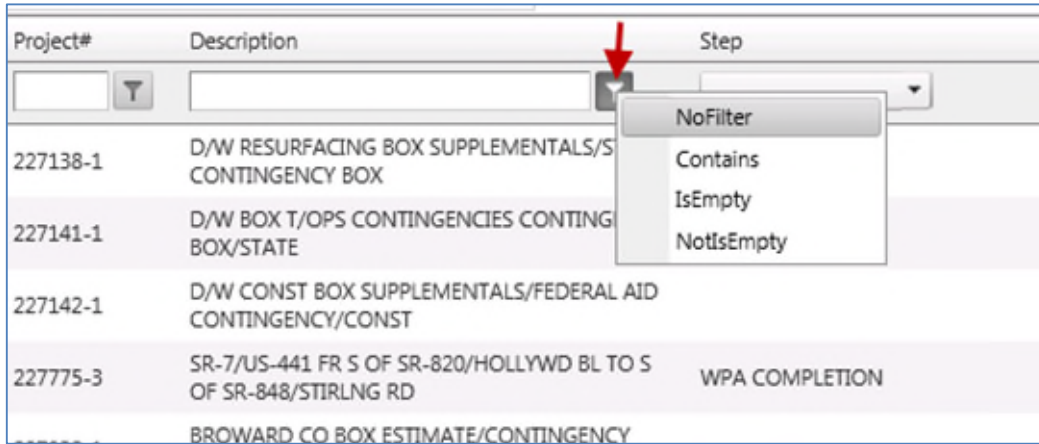


Figure 11 Filtering the project list

The tabs along the top of the project list serve as filters as well. Clicking on any one of the tabs will filter the projects by that specific area.

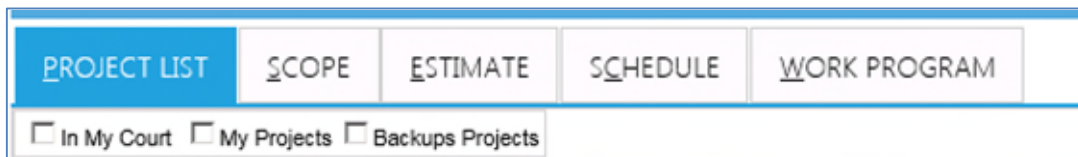


Figure 12 Project list filtering tabs

For example, if the Scope tab is selected, only those projects awaiting a Scope approval are displayed, as shown below.

Project#	Description	Work Mix	PY of Letting	Pr52 Amount	Update Due	Reviewer	Status	Step	Project Manager	Last Update	Letting Date
409354-4	SR-8/8-95 FROM STIRLING RD TO SOUTH OF BROWARD BLVD.	1070-LANDSCAPING	2023	\$82	03/27/2015	Dianne Forte	IN REVIEW	SCOPE APPROVAL	Robert Bostian	10/06/2014	
433106-4	SR-8/8-95 FR S. OF SR-842/BROWARD BLVD TO N. OF SR-870/COMMERCIAL BLVD	0234-ADD SPECIAL USE LANE	2015	\$122,008,250	04/30/2015	Dianne Forte	IN REVIEW	SCOPE APPROVAL	Robert Bostian	12/23/2014	04/01/2015

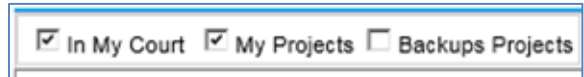
Figure 13 Tab filtered view

Another filtering option available is the list checkboxes located just below the tabs. Selecting any one of them will filter by that choice. The three available are:

- In My Court- Projects requiring an action by the user.
- My Projects- Projects assigned to the user.

- Backup Projects- Projects to which the user has been designated as a backup.

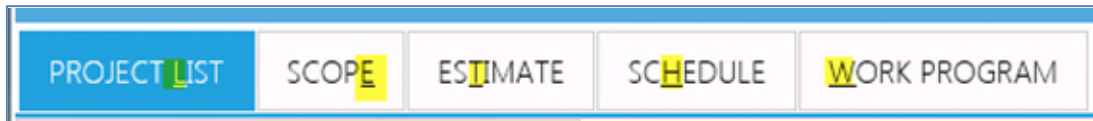
These boxes can be selected as a combination; one or more can be selected at a time as shown here.



### 3.1.2 Using Shortcut Keys

WPUC has shortcut keys that may be used to navigate between the different tabs within the module using the keyboard. Shortcut keys are marked with an underscore ( \_ ) beneath the designated letter.

To use the shortcut keys, hold down the Alt key and click the desired letter. For example to get to the Estimate tab hold down Alt+T.



### 3.1.3 General WPUC Screen Information

There are several other helpful navigational tools and features available in WPUC. See the list below for details.

Project#	Description	Work Mix	FY of Letting	Ph52 Amount	Update Due	Reviewer	Status	Step	Project Manager
428009-1	SR-9/I-95 FROM MIAMI-DADE/BROW CL TO DAVIE BLVD.	0750-ITS COMMUNICATION SYSTEM	2015	\$2,820,757	04/22/2015	Morteza Allan	IN REVIEW	SCOPE APPROVAL	Robert Bostian
431110-1	SR-862/I-595 FROM EXIT RAMP TO NB SR-9	0429-BRIDGE REHABILITATION	2017	\$455,045	08/15/2016		DRAFT	PM ESTIMATE UPDATE	Robert Bostian
432222-1	SR-9/I-95 @ SR-862/I-595 BRIDGE PAINTING	0625-BRIDGF - PAINTING	2018	\$6,427,875	08/15/2016		DRAFT	PM ESTIMATE UPDATE	Robert Bostian

Figure 14 WPUC Screen

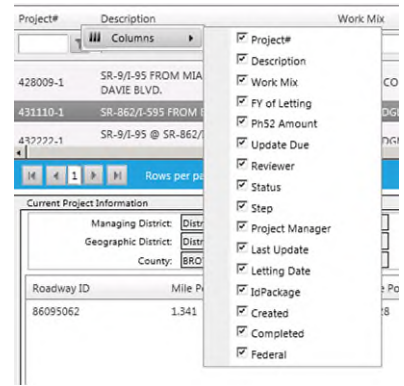


1 Project number and description. This is displayed when a project is selected.



2 Use to expand the Project List grid when Change Management Window is open.

- 3 Allows users to customize which columns are displayed. Uncheck a column to remove it from the grid.



- 4 Use the arrows to change the current Fiscal Year.
- 5 Clear the filters to reset the Project List columns and clear all filters.
- 6 Use the Export to Excel feature to export the Project List to an Excel worksheet.
- 7 Expand the items displayed on the grid by clicking the dropdown and selecting a new option. Use the arrows to change pages within the Project list.

---

## 4 Creating a Change Request Package

---

Project Managers, as well as users with the appropriate permission levels, can initiate a change request from WPUC. A submitted change request(s) is considered a package. A package can contain 1 or more change requests. Change requests can be created from the WPUC Project List or from the Project Details screen.

### 4.1 Creating a package from WPUC

---

To create a change request package from the WPUC Project List, select the project list tab. A list containing all of the projects will be displayed. (See [section 3.1](#) for more on the WPUC project list.) Users can select the “My Projects” checkbox to filter by only the projects belonging to them. Projects with a status of “Update Required” are ready for change request packages.

#### 4.1.1 Change Management Console (CMC)

---

Select a project with a status of “Update Required” from the WPUC Project List. The Change Management Console (CMC) is displayed when the project is selected



**Hint:** Remember to use the filters to easily find projects with this status.

From the CMC screen, click “Create Change Request Package”. This will open up the “Changes Proposed” section. The Change Management Console consists of the following:

**Current Project Information-** On the left side is listed all of the current project details. If there is an existing scope of work or any critical dates, the buttons will be active, as shown in [Figure 15](#). Clicking on either one of them will bring up the existing scope or critical dates. Current funding is also displayed, showing the Phase 52 (PDC) amount as well as the fiscal year. This data is for information purposes and therefore is read only.

**Changes Proposed-** On the right side is where information will be entered for the specific change request package.

- **Change Package Description-** Enter a description for the package.

- Impacts- Here is where the user will select which change request will be created. Use the radio buttons to make a selection. Users can select multiple impacts and create a change request for each.

Impacts: Yes No  
 Phase 52:  Yes  No  
 Scope of Work:  Yes  No  
 Schedule:  Yes  No



**Note: A Scope of Work change request MUST include a Phase 52 change request as well.**

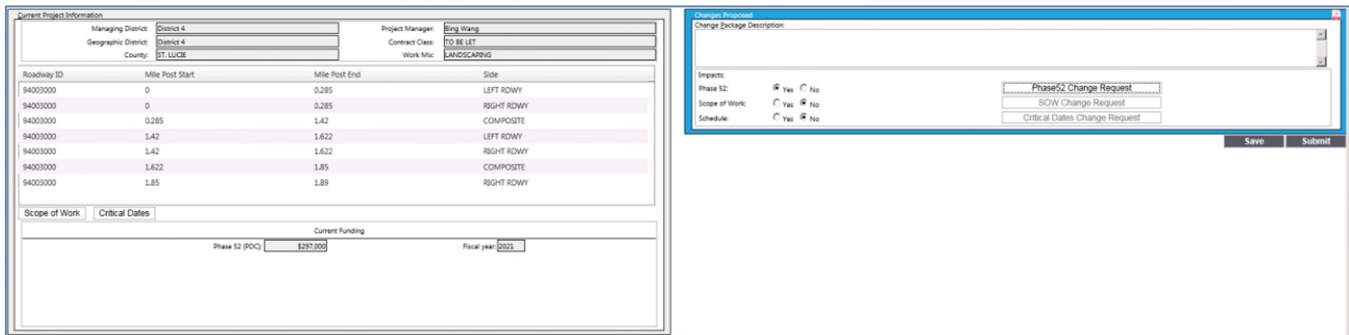


Figure 15 Change Management Console

#### 4.1.1.1 Phase 52 Change Request

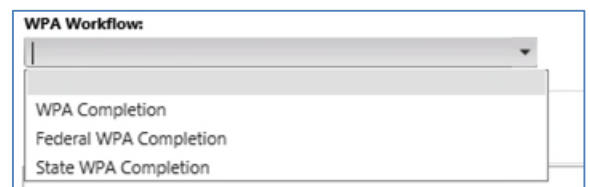
Select the Phase 52 radio button to create a Phase 52 change request. In the Phase 52 CR window users must select a Phase 52 workflow as well as a WPA workflow. The current Phase 52 amount as well as the fiscal year is displayed as a reference. Enter a proposed Phase 52 amount and fiscal year. When the proposed funding amount is entered the system will calculate the difference and display the change amount. Vice versa, the change amount can be entered and the funding amount will be updated.

##### 4.1.1.1.1 Phase 52 Workflows

There are 3 types of workflows associated with a Phase 52 change request. There is a front review, a back review and a normal review. When a front review workflow is used, the system requires a back review. In order to only conduct one review, administrators can create a workflow using the “normal” type. This type does not require a back review. It is best practice to name the workflows so they are easily identified.

##### 4.1.1.1.2 WPA Workflows

In the same way, the system allows for multiple WPA Completion workflows. This is to allow the districts the flexibility of creating multiple WPA Completion workflows in order to identify state vs. federal projects.



Phase 52 - Project: 230256-8 / SR-713/KING'S HWY FR SOUTH OF SR-70 TO NORTH OF PICOS RD

Phase 52 Workflow: [Dropdown]

Workflow Steps: [Dropdown]

WPA Workflow: [Dropdown]

WPA Workflow Steps: [Dropdown]

Current Funding		
Phase 52 (POC):	\$297,000	Fiscal year: 2021

Proposed Funding		
Type: Annual WP Update	Phase 52: \$452,223	Fiscal Year: 2021
	Change amount: +\$ 155,223	

Description: [Text Area]

Add Document [Button]

Document Name	Description	Uploaded by
No records to display.		

Close Save

Figure 16 Phase 52 CR

Click the “Add Document” button to add supporting documentation for the Phase 52 estimate. A window will appear, allowing the user to browse for the document to be uploaded. Once it is selected, enter the file name, if different than what is listed, and a short description and click “OK” to save it.



**Note: The change request must be saved prior to uploading a document.**

File Name: test.txt

Description: type here

Ok Cancel

At this point the change request can be saved as a draft and be completed at a later time. If there are no other change requests that will be part of the package, it can be submitted for review.

### 4.1.1.2 Scope of Work change request

Select the Scope of Work radio button to create a scope change request. When selected, a new window will open up. If the project has an existing scope, it will display on the left side. On the right side the new scope details will be entered.

Select the appropriate workflow from the dropdown. Notice below the workflow is the Workflow sequence. This is a list of all of the reviewers that are part of the approval process for this change request. The reviewers are listed in sequential order. When an AD group is selected for the reviewer, users can click the name of the group to display its members.



**Hint: Selecting a workflow will display the name(s) of the reviewer(s).**

Next, select the reason for the CR from the dropdown. In the “Differences” box enter details on what is changing, then, enter a scope summary. Select the scope elements that are affected; multiple elements can be selected. Notice that when an element is selected, a text box for that element appears. Enter the details in the appropriate textbox for each element selected.

Existing scope elements can be copied by clicking the “Copy Scope” button on the left side. Once the elements have been copied, users can deselect the ones that do not pertain.

Supporting documents can be added here as well once the request has been saved. In the same way as the Phase 52, select the “Add Document” button to upload a file. Select the file to be uploaded, enter a name and a short description and click ok to complete the upload.

Click “Save” when done. If all of the changes have been entered, click “Close” to exit the scope window.

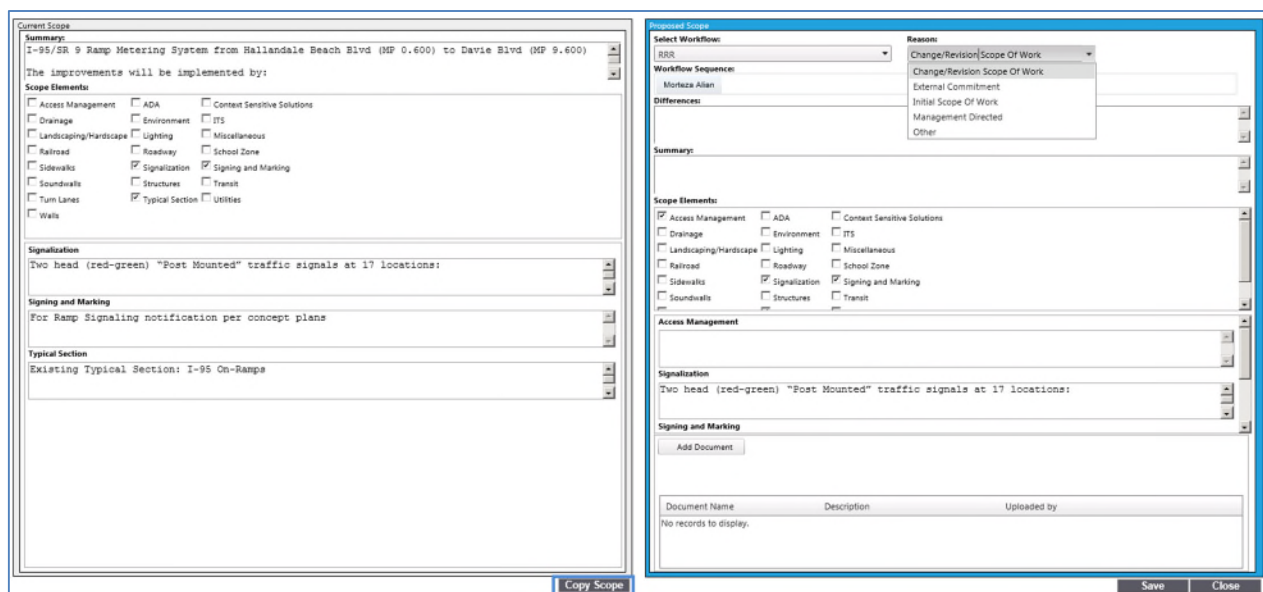


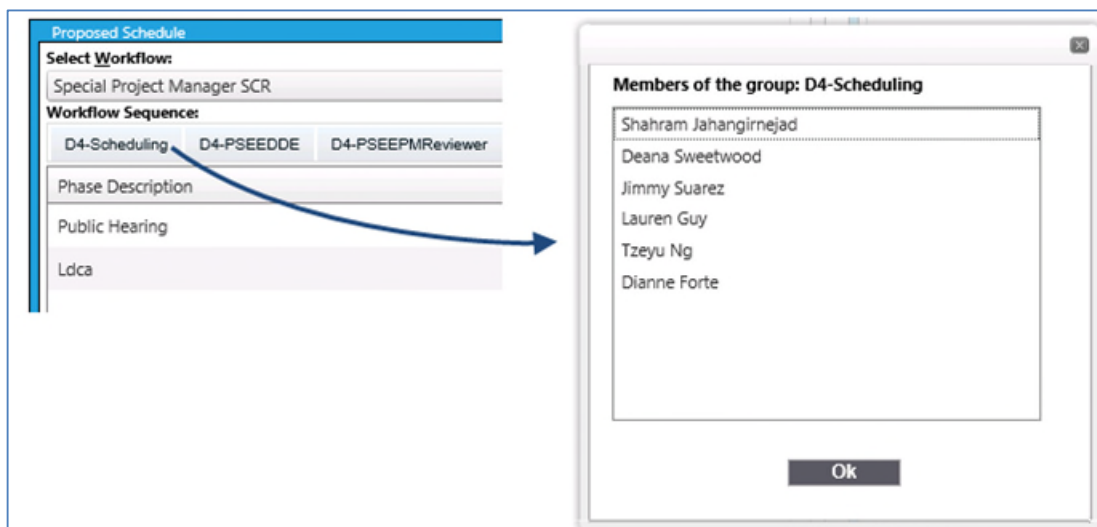
Figure 17 Scope of Work CR



### 4.1.1.3 Critical Dates CR

Select the Schedule radio button to create a critical dates change request. When selected, a new window will open up. If the project has an existing schedule, it will display on the left side. If there is no schedule available, the left side will be empty. On the right side the new schedule details will be entered.

Select the appropriate workflow from the dropdown. Notice below the workflow is the Workflow sequence. This is a list of all of the reviewers that are part of the approval process for this change request. The reviewers are listed in sequential order. When an AD group is selected for the reviewer, users can click the name of the group to display its members.



Next, select the reason for the CR from the dropdown. Enter the new date(s) in the appropriate fields. Dates can be manually entered or selected from the calendar pop up. Enter a description for the change request and click “Save” when complete. If no other changes are required, click “Close” to exit the window.

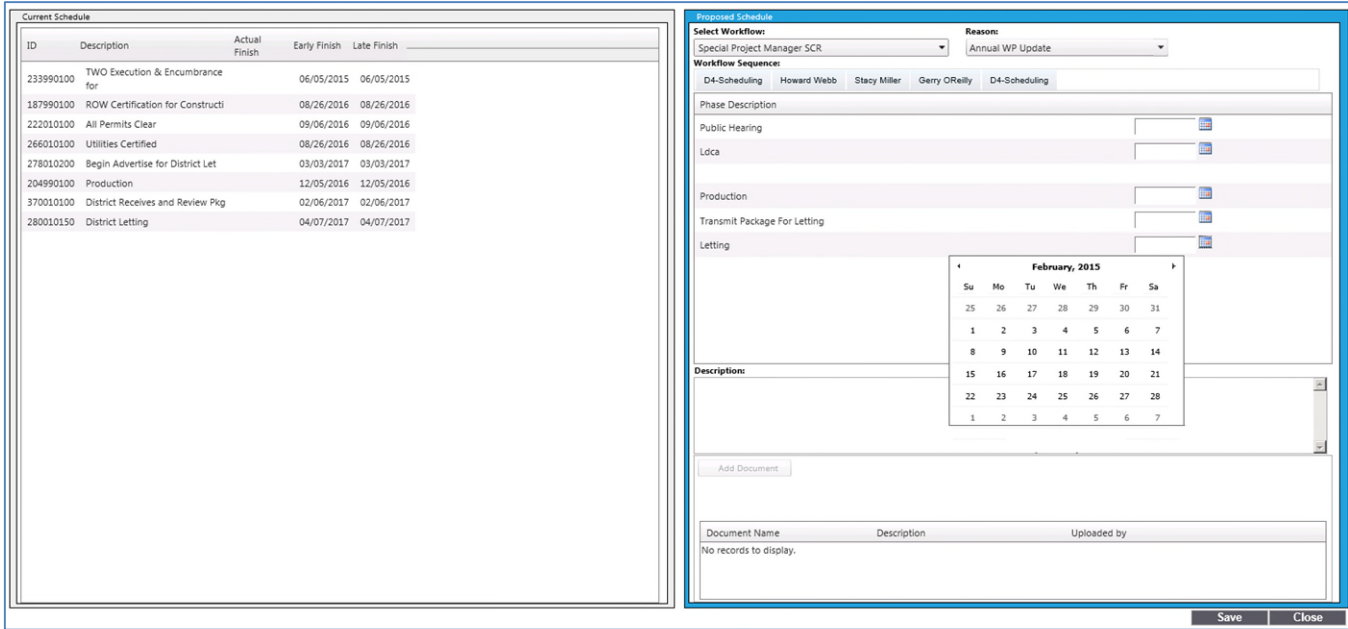
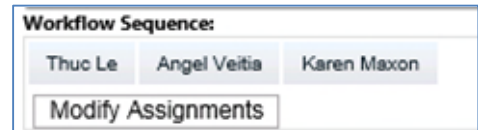


Figure 18 Critical Schedule CR

### 4.1.2 Updating a workflow

Users with the appropriate permission level can update/modify workflows on the fly. Workflows can be updated/modified when creating the change request and at any step in the approval process as long as the step is not complete.

To update a workflow while creating a change request, the request must first be saved. Once it is saved the “Modify Assignments” button is activated. Clicking the

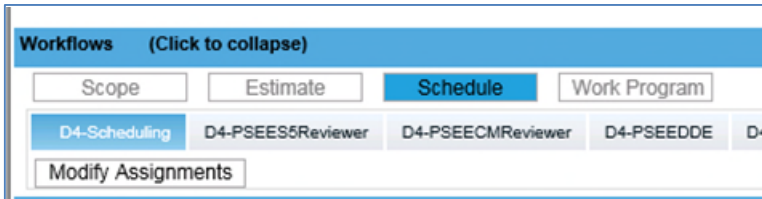


button opens up the modification window, shown below in [Figure 19](#). In the modification window users can rearrange the order of reviewers as well as delete or add a reviewer.

To rearrange the order of reviewers select the desired reviewer and use the up/down arrows located to the right of the reviewers list. To delete a reviewer, select their name and click the X to the right of the reviewers list.

New reviewers can be added as well. To add a reviewer select the type from the dropdown; the options are an individual reviewer or manager assigned. Next select whether a specific user will be assigned or instead an AD group. Type the reviewer name and select it from the list and click “Add Step”. Click “Save Changes” once all changes are complete.

### 4.1.2.1 Updating from the Project List



Workflows can also be modified from the WPUC Project List as well. To update from the list, select the desired project from the list. From the Workflows section of the page, select the request type that will be

updated. Proceed with updating the workflow as stated above in [Section 4.1.2](#).

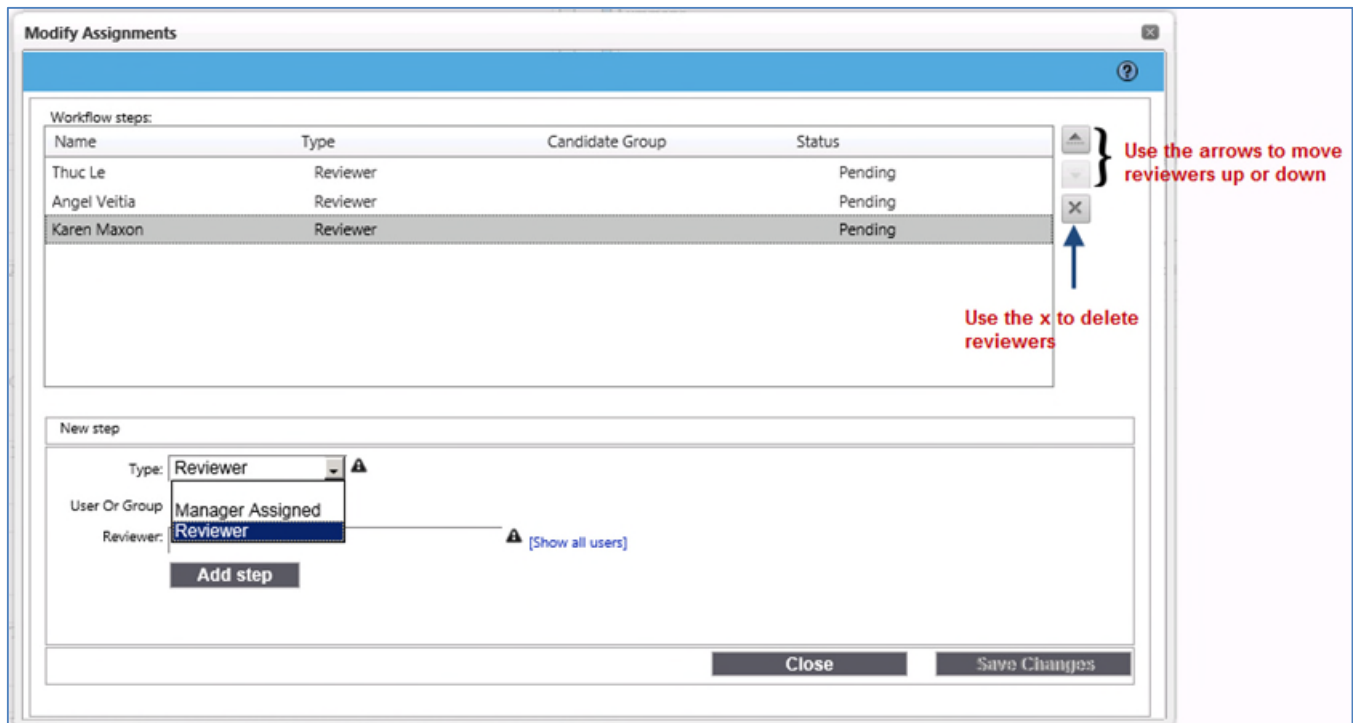


Figure 19 Modifying a workflow

### 4.1.3 Submitting a CR Package

Once all of the necessary change requests have been created, the package is ready or submission. Click the “Submit” button to complete. A confirmation is displayed; click “Ok” to commit or cancel to continue working on the package.

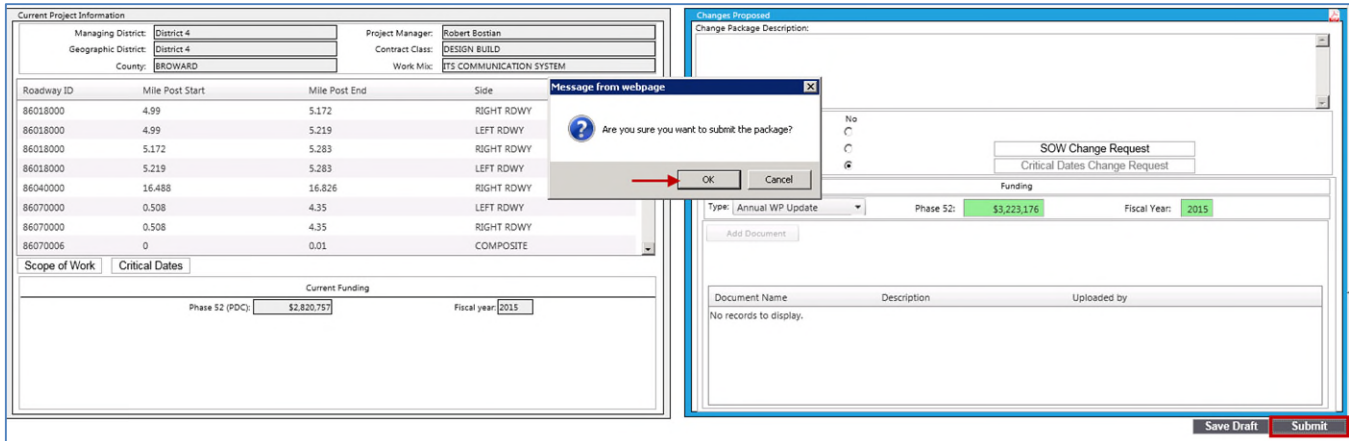
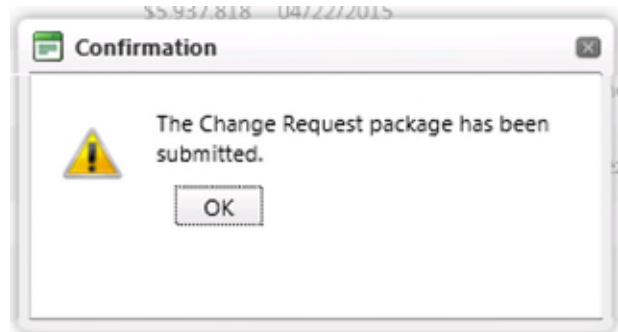


Figure 20 Submitting the CR Package

Once “Ok” is selected, the package is submitted for review and a confirmation message is displayed.

At this point notification emails are sent to the appropriate reviewers.



## 4.2 Creating a package from PSEE Project Details

WPUC Change Requests can also be created from the PSEE project details screen. Project Managers can view all submitted change requests as well as create new ones.

### 4.2.1 Adding the CR modules

To get started, select a project from the dashboard. From Project Details, click the Module Menu tab to expand it.

Go To Project | DASHBOARD | PROJECT | SEARCH | MONTHLY SCHEDULE UPDATE | CREATE A PROJECT | MY ASSIGNMENTS | RUN REPORTS | WPUC PROJECT LIST | HELP

**Project Info [421707-9] (Click to collapse)**

**Item Segment (Click to collapse)**

District:	Version:	PSEE Project Manager:	WP Project Manager:
District 4	AD	Robert Bostian Vanita Saini (Backup)	BOSTIAN/SAINI

**Location (Click to collapse)**

County	Roadway ID	Roadway Side	Number of Lanes	MP From/To
MIAMI-DADE	87075000	COMPOSITE	8	3.485 / 5.442

Item Segment Description: SR 93/I-75 ML SYSTEM FROM NW 170 STREET TO MIAMI-DADE/BROWARD CL  
 Work Length: 1.957      Project Length: 1.957

**Description (Click to collapse)**

Work Mix:	Status:	Contract Class:
0750 - ITS COMMUNICATION SYSTEM	PLANS TO DIST CONTR.	9 - DESIGN BUILD

Trans System: 01 - INTRASTATE INTERSTATE  
 Item Segment Comments: ITS SYSTEM INTEGRATOR FOR THE I-75 MANAGED LANES GOES WITH 421707-7

The Module Menu will open up allowing the user to select which modules to display in the project details screen. To view the WPUC change requests select Critical Schedule, Scope or Phase 52. Once selected, details for each of the types of change requests become available.

- View
  - Contracts
  - Documents
  - ERC
  - Financial
  - GIS
  - Item Segment Change History
  - Local Agency Program
  - Project Impacts
  - Project Scheduling (PSM)
  - Related Projects
  - Video Log
- Manage
  - Address Book
  - Approved Scope
  - Commitments
  - Design Approval Requests
  - Environment
  - External Agency
  - Final Plans Processing
  - Permits
  - Phase Review
  - Project Fact Sheet
  - Project Status
  - Resolution Tracking
  - Survey Work Order
- Change Requests
  - Critical Schedule
  - Scheduling
  - Scope
  - Work Program (Includes Phases)
  - WP Phase 52
- Journal

## 4.2.2 Viewing historical change requests

The past change requests are all available for viewing in PSEE. Once the modules stated above have been added, the details for each of the types of requests is listed. In the example below there have been two submitted scope change requests. Details such as the created date, approved date, status and descriptions are available.

Project Scope Change Requests (Click to collapse)						
	Created Date	Submitted Date	Status	Scope Type	Request Description	Summary
<a href="#">View</a>	10/21/2013	10/21/2013	Approved	Primary	Initial scope request	Add new traffic signal mast arm at SE 17 St (A1A) and SE 15 Ave
<a href="#">View</a>	4/11/2014	4/11/2014	Approved	Primary	Scope: add milling in intersection to facilitate re-striping added interconnect  Schedule: No change  Budget: Increased approx \$91k due to scope updates	Add new traffic signal mast arm at SE 17 St (A1A) and SE 15 Ave
<a href="#">[Add Scope Change Request]</a>						

WP Phase 52 (Click to collapse)	
No WP Phase 52 Change Requests to display.	
<a href="#">[Add WP Phase 52 Change Request]</a>	

Figure 21 Scope CR history

Click the “View” link to expand the selection and view more details. Users can also click the “View in WPUC” link to view the actual change request package. When selected, a new window will open up displaying only that package record in WPUC and that specific change request.

<a href="#">Return to Scope Change Requests List</a>		<a href="#">View in WPUC</a>	
<b>Request</b>	Initial scope request		
<b>Description:</b>			
<b>Reason:</b>	Initial Scope Of Work	<b>Status:</b>	Approved
<b>Created Date:</b>	10/21/2013	<b>Submitted Date:</b>	10/21/2013
<b>Completed Date:</b>	10/24/2013		
<b>Requested By:</b>	<a href="#">Scott Peterson</a>	<b>Completer:</b>	<a href="#">Richard Creed</a>
<b>Request part of Package?:</b>	Yes		
<b>Scope Definition:</b>	Add new traffic signal mast arm at SE 17 St (A1A) and SE 15 Ave		
<b>Scope Elements:</b>	Signalization	New mast arm at intersection	
	Signing and Marking	Add signing and marking for new intersection.	
	Roadway	Reconstruct sidewalk returns and ramps.	
<b>Reviewer Assignment (Click to collapse)</b>			
<b>Order</b>	<b>Type</b>	<b>Reviewer</b>	<b>Candidate Group</b>
1	Reviewer	<a href="#">Richard Creed</a>	
		<b>Status</b>	<b>Completed Date</b>
		Approved	10/24/2013
<b>FYI Assignment (Click to collapse)</b>			
No Assignments currently exist.			

Figure 22 Historical change request details

Once the user is done viewing the details of the change request they can click close to exit the window. They will still be in the WPUC single package view, meaning they will be in the WPUC Project List but ONLY the selected project is displayed and the rest of the WPUC grid is unavailable. Click close to return to the PSEE Project tab.

The screenshot displays the 'WPUC Project List' for project 433974-1, 'CYPRESS CREEK PARK AND RIDE LOT REPLACE BUS SHELTERS'. The interface includes a 'Workflows' section with tabs for 'Scope', 'Estimate', 'Schedule', and 'Work Program'. Below this is a table with one row of project data:

Project#	Description	Work Mix	FY of Letting	Ph52 Amount	Update Due	Reviewer	Status	Step	Project Manager
433974-1	CYPRESS CREEK PARK AND RIDE LOT REPLACE BUS SHELTERS	8051-PUBLIC TRANSPORTATION SHELTER	2015	\$124,817			COMPLETED	SCOPE APPROVAL	Scott Peterson

Below the table is a 'Current Project Information' section with fields for Managing District (District 4), Geographic District (District 4), County (BROWARD), Project Manager (Scott Peterson), Contract Class (DISTRICT CONTRACT), and Work Mix (PUBLIC TRANSPORTATION SHELTER). There is also a 'Scope of Work' section with 'Critical Dates' and 'Current Funding' (Phase 52 (POC): \$124,817, Fiscal year: 2015).

On the right, a 'Changes Proposed' window is open, showing 'Change Package Description: Initial project scope'. It includes sections for 'Impacts' (Phase 52, Scope of Work, Schedule), 'Funding' (Type: Annual WP Update, Phase 52, Fiscal Year), and 'Request Clarification'. A 'SOW Change Request' button is visible in the 'Impacts' section.

Figure 23 WPUC single package mode

### 4.2.3 Creating a change request

Along with viewing historical data, users can create new change requests from the same screen. Within each of the change requests modules there is a link for creating new requests.

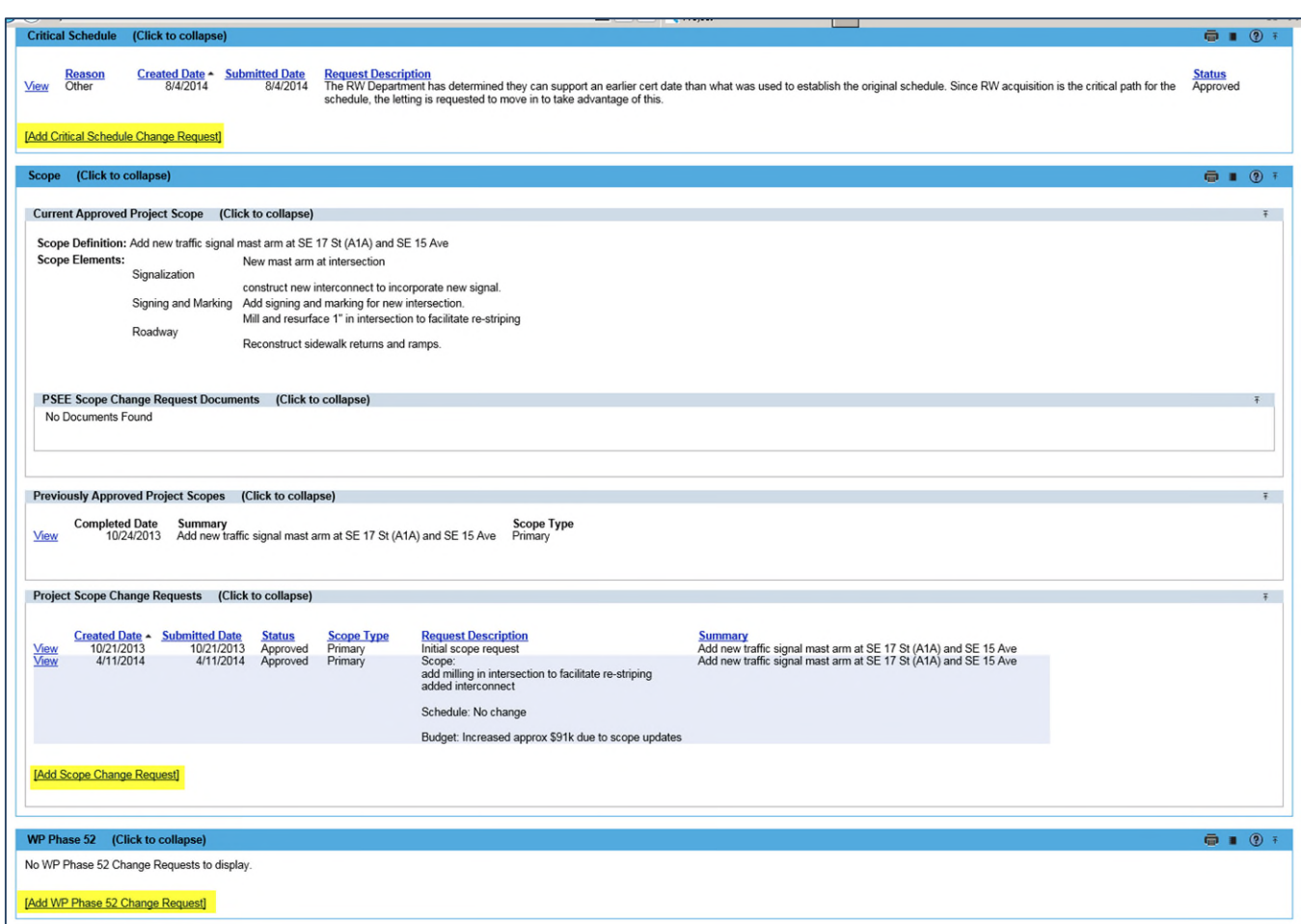


Figure 24 Creating a new CR from PSEE

Click the appropriate link to add a new change request. When selected, the WPUC Single Package view is invoked. This means a new window will open up and only the selected project is listed. When a new scope or critical schedule change request is selected, the window will open directly to the appropriate request.

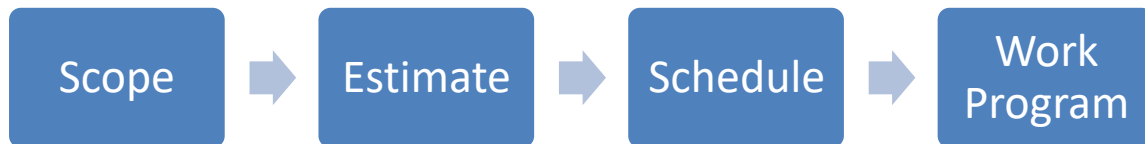
Enter in the details for the change request and click save and close when complete. Once the CR window is closed the screen is still in the WPUC Single Package view. From here a Phase 52 request can be added or the package can be submitted as is. Once the package is submitted, the view changes to the project list but only the selected project is displayed. Clicking close closes the WPUC Single Package window and the user returns to the project.



## 5 Review Process

Once a package has been submitted, it is ready for review. Each reviewer(s) will receive an email notifying them that a package has been submitted and is awaiting their review.

Reviews happen in sequential order. The prior review must be completed before the next review can happen.



### 5.1 Reviewing a Change Request

To begin reviewing a package go to the WPUC Project List. The list displays all of the projects awaiting a yearly update. Projects with a status of “In Review” are ready for the review process. Users can use the filters available to easily find projects assigned to them, (i.e., the “In my Court” checkbox, filter by status, etc.).

#### 5.1.1 Manager assigned vs. self-assigned

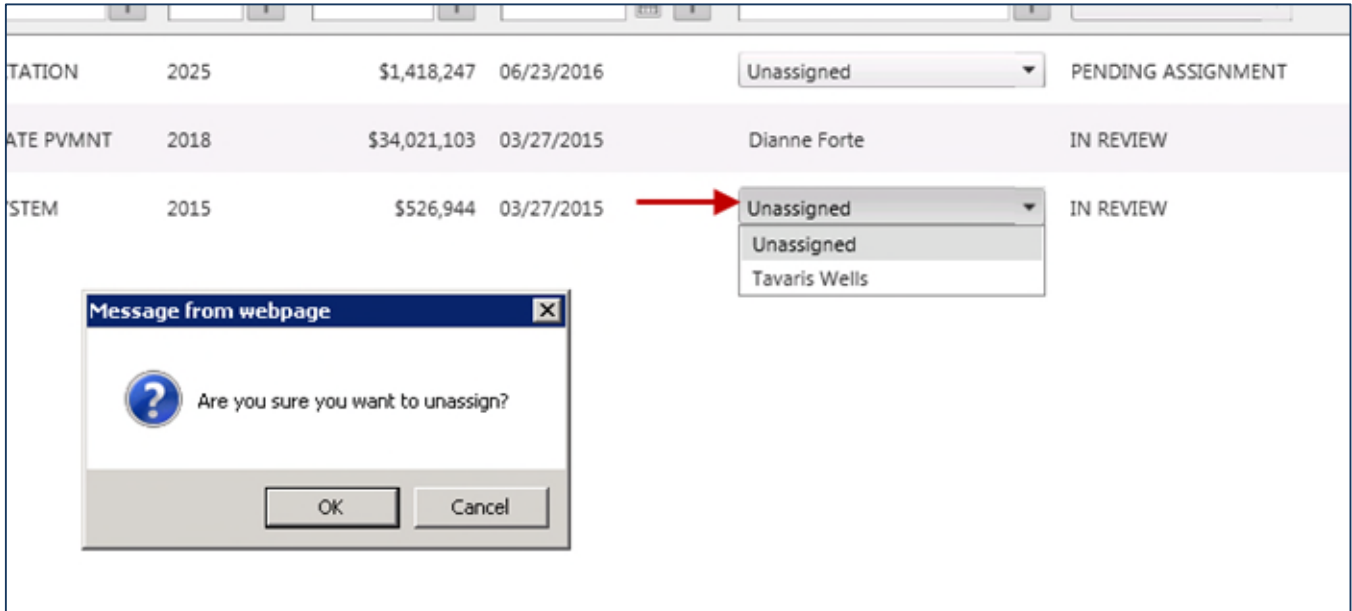
While there are projects that may be directly assigned to a reviewer, there are also projects that are assigned to an Active Directory group or to a manager that will then assign them to a team member. These projects will have a status of “Pending Assignment”

##### 5.1.1.1 Manager assigned reviews

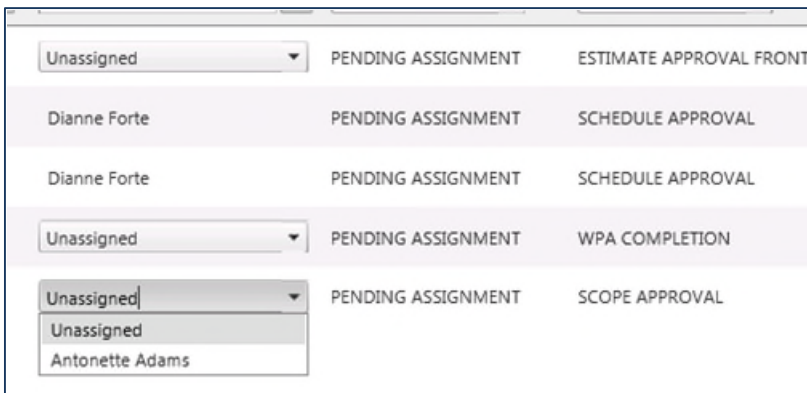
For manager assigned reviews, the designated manager will be able to select from a dropdown of people. This dropdown is populated by the different Active Directory groups that have already been established. The manager clicks on the dropdown and selects a reviewer from the list. They will get a confirmation message asking if they are sure they want to assign the package. Once they click “OK” they get a final confirmation that the package has been assigned.

Reviewer	Status
Unassigned	PENDING ASSIGNMENT
Mya Williams	
Michael Lucero	
Ron Grabloski	
Karen Maxon	
Antonette Adams	
Cassandra Lamey	

Managers also have the option to unassign a previously assigned reviewer. To unassign a package, they can click the dropdown again and select “Unassigned”. They will receive a message asking them to confirm. Once they click “OK” the project becomes available and can be assigned to a new reviewer.

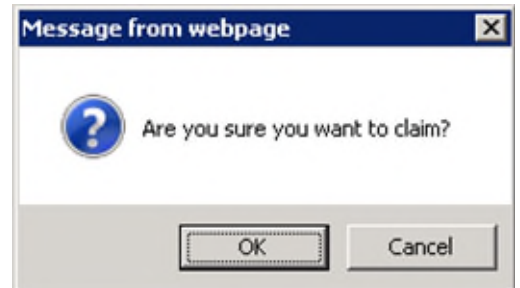


### 5.1.1.2 Self-assigned reviews



Self-assigned reviews means that any member of the designated Active Directory group can “claim” that package and begin working on it. To claim a package for review, the reviewer can click the dropdown and select their own name from the list. They will see only their name in the list. Once they have selected their

name they will receive a confirmation asking if they are sure they want to claim it. Once they click “OK” the claim is done and that package is now theirs to be reviewed.



## 5.1.2 Scope Review

From the WPUC Project List, users can select the “in my court” checkbox. This will only display projects assigned to them.



**Hint: Users can also use the tabs along the top to filter by type.**

1. To begin, select the project from the list. Once selected the Change Management Console is displayed.
2. In the “Proposed Changes” section, click the “SOW Change Request” button, (shown below in [Figure 25](#)), to view the proposed changes.

The screenshot shows a window titled "Changes Proposed" with a "Change Package Description" field. Below this are radio buttons for "Impacts: Yes No", "Phase 52:", "Scope of Work:", and "Schedule:". A red arrow points to the "SOW Change Request" button, with "Critical Dates Change Request" below it. The "Funding" section shows "Type: Annual WP Update", "Phase 52: \$89,000", and "Fiscal Year: 2015". Below is a table with columns "Document Name", "Description", and "Uploaded by", containing "No records to display.". At the bottom is a "Request Clarification" section, also with "No records to display.". At the very bottom are buttons for "Restart", "Clarify", "Reject", and "Approve".

*Figure 25 Scope of Work CR Approval*

This opens the SOW CR for review. This is read only and no changes can be made to the request. Once it has been reviewed, click close to exit the window.

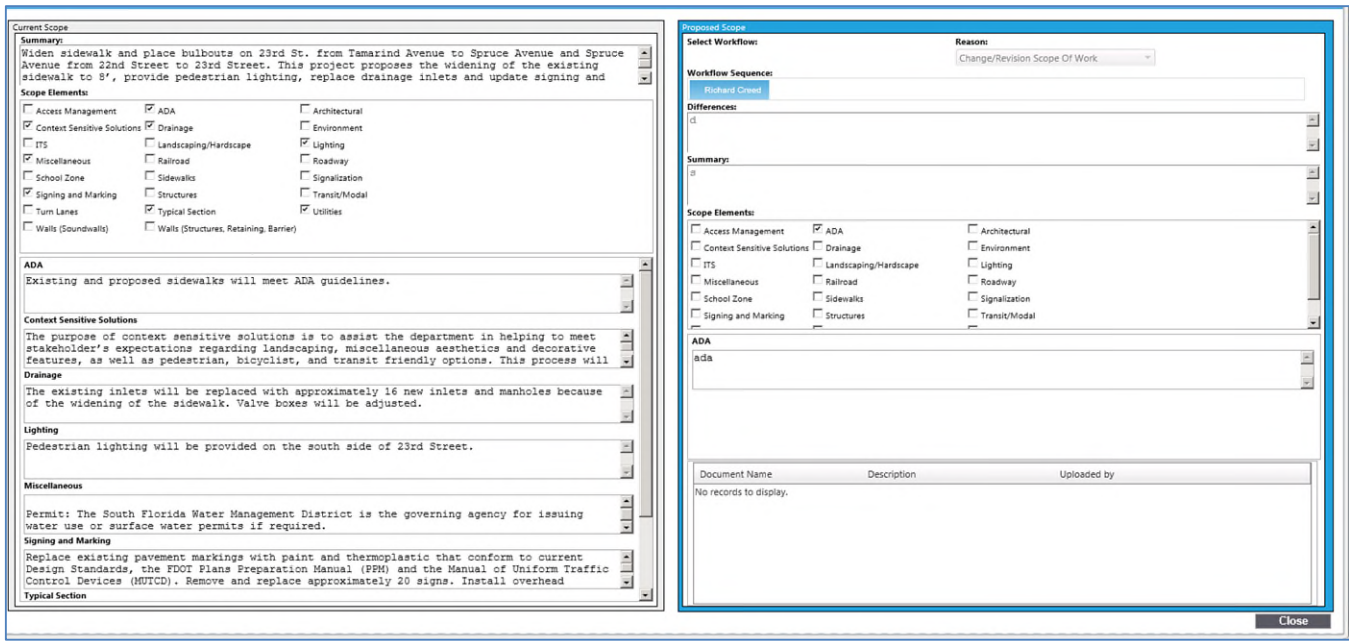
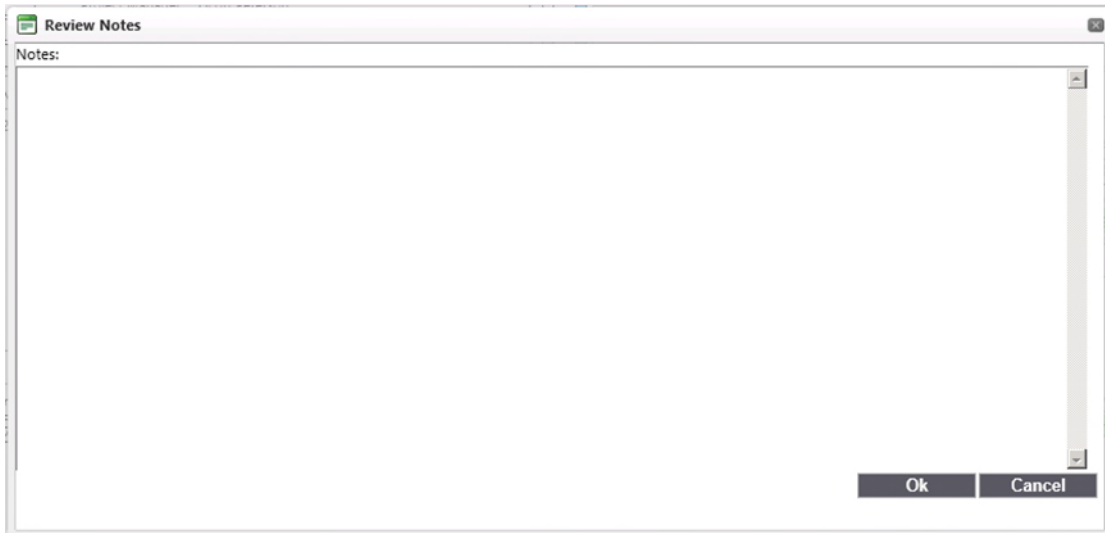


Figure 26 SOW Window

3. Once the scope has been reviewed it can be approved, rejected, restarted or users can request clarification. (Restarted and request for clarification will be further explained in the following sections.) Click the appropriate button to complete the review.
4. A new window will pop up where notes can be entered. Enter any comments regarding the change request here.



5. Once it has been approved, the next person in the process will receive an email notifying them that the project is awaiting their review. The project manager will receive an FYI email as well. If it is rejected, the PM will receive an email notifying them that their request has been rejected and the reason why.

### 5.1.3 Phase 52 (Estimate) Review

1. To begin, select the project from the list. Once selected the Change Management Console is displayed.
2. In the “Proposed Changes” section, select the “Phase 52 Change Request” to view the request. Fields highlighted in **green** display the changes that were submitted. Unlike the other change requests where everything is “read only”, the reviewer here CAN:
  - a) Update the Phase 52 amount and the Fiscal Year
  - b) Upload a document.
  - c) Use the “Save” button to enter/change data, save it and return to it at a later date.

Phase52 - Project: 409354-4 / SR-9/1-95 FROM STIRLING RD TO SOUTH OF BROWARD BLVD.

**Workflow Steps:**  
Karen Maxon

**WPA Workflow Steps:**  
Antonette Adams Jose Theiler

**Current Funding**

Phase 52 (PDC):	\$82	Fiscal year:	2023
-----------------	------	--------------	------

**Proposed Funding**

Type:	Annual WP Update	Phase 52:	\$1,500	Fiscal Year:	2022
		Change amount:	+\$ 1,418		

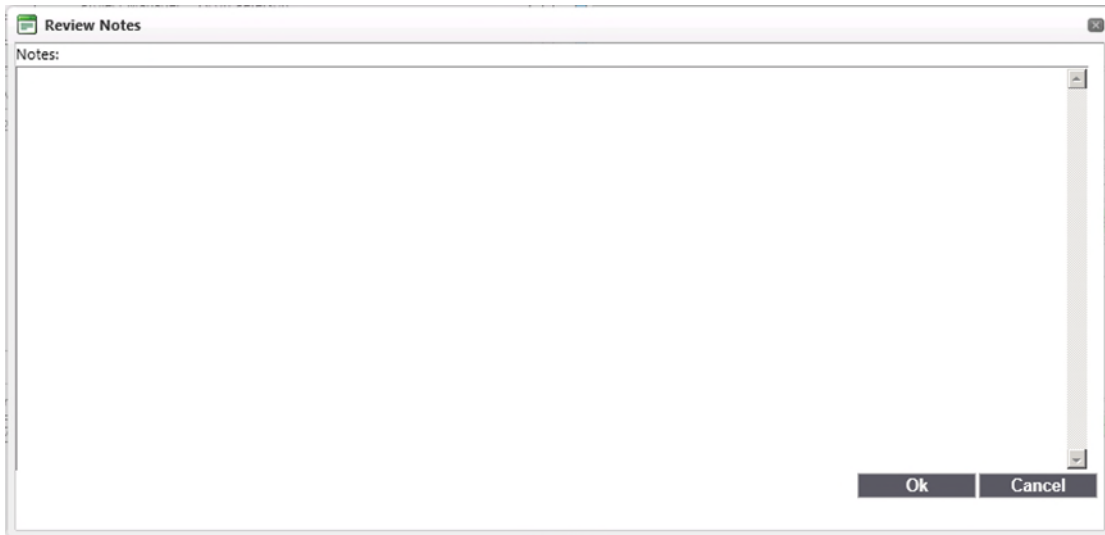
**Descriptions:**  
This is a test

**Documents:**  
Add Document

Document Name	Description	Uploaded by
No records to display.		

Close Save

3. Once the estimate has been reviewed/updated it can be approved, rejected, restarted or users can request clarification. (Restarted and request for clarification will be further explained in the following sections.). Click the appropriate button to complete the review.
4. A new window will pop up where notes can be entered. Enter any comments regarding the change request here.



5. Once it has been approved, the next person in the process will receive an email notifying them that the project is awaiting their review. The project manager will receive an FYI email as well. If it is rejected, the PM will receive an email notifying them that their request has been rejected and the reason why.

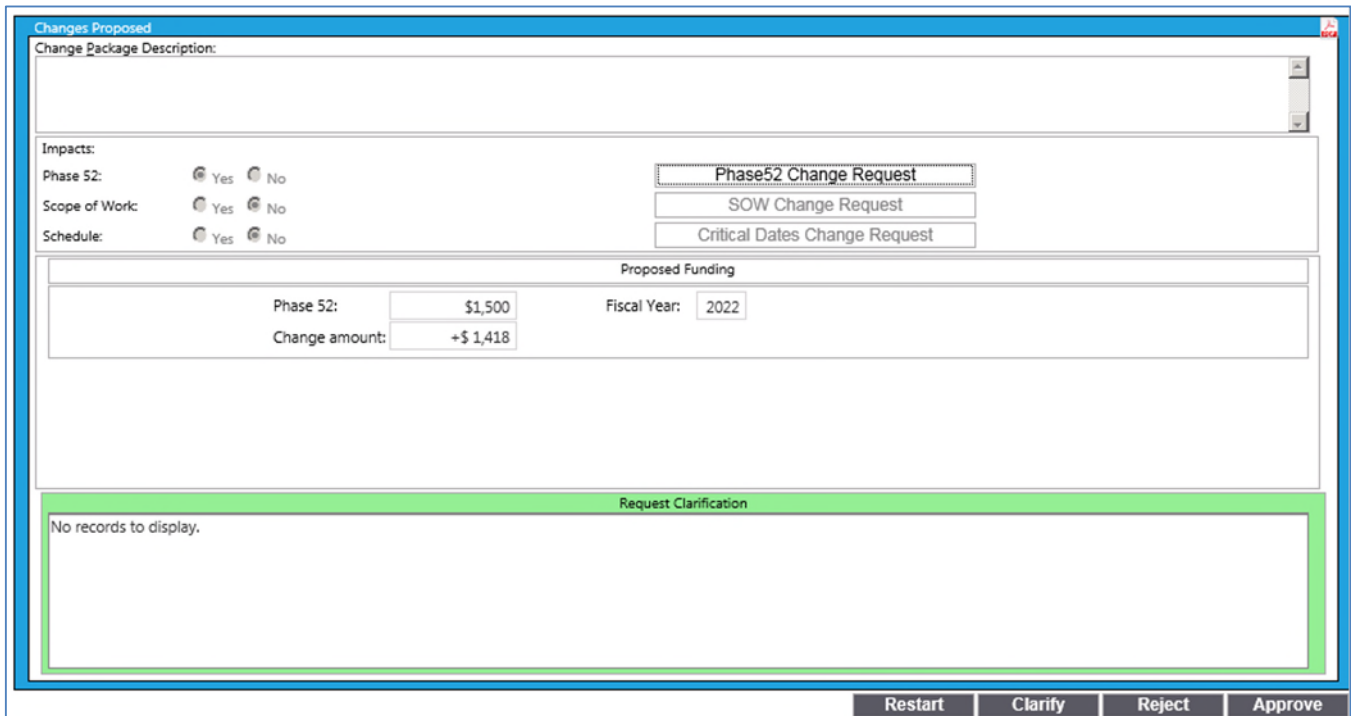


Figure 27 Phase 52 (Estimate) CR Approval

### 5.1.4 Critical Dates (Schedule) Review

1. To begin, select the project from the list. Once selected the Change Management Console is displayed.

- In the “Proposed Changes” section, click the “Critical Dates Change Request” button, (shown below in [Figure 28](#)), to view the proposed changes.

The screenshot shows a web interface titled "Changes Proposed". At the top, there is a "Change Package Description" field. Below it, there are three sections: "Impacts:", "Phase 52:", "Scope of Work:", and "Schedule:". Each section has radio buttons for "Yes" and "No". To the right of these sections are three buttons: "Phase52 Change Request", "SOW Change Request", and "Critical Dates Change Request". A red arrow points to the "Critical Dates Change Request" button. Below the buttons is a green-bordered area labeled "Request Clarification" which contains the text "No records to display.". At the bottom right, there are four buttons: "Restart", "Clarify", "Reject", and "Approve".

Figure 28 Critical Dates CR Approval

This opens the Critical Dates CR for review. This is read only and no changes can be made to the request. Once it has been reviewed, click close to exit the window.

The screenshot shows two side-by-side windows. The left window is titled "Current Schedule" and contains a table with the following data:

ID	Description	Actual Finish	Early Finish	Late Finish
233990150	Execution Date (Design)	12/02/2013	12/02/2013	12/02/2013
250990150	Phase 31 Opened	04/16/2013	04/16/2013	04/16/2013
187990150	ROW Certification for Constructi	07/06/2015	07/06/2015	07/06/2015
222010150	All Permits Clear	08/06/2015	08/06/2015	08/06/2015
246010150	Utilities Certified	08/06/2015	08/06/2015	08/06/2015
278010150	Begin Ad for Letting	02/19/2016	02/19/2016	02/19/2016
204890150	Production	12/07/2015	12/07/2015	12/07/2015
212010150	Package Received in Tallahassee	01/25/2016	01/25/2016	01/25/2016
280010150	Letting	04/27/2016	04/27/2016	04/27/2016

The right window is titled "Proposed Schedule" and shows a "Workflow Sequence" table with the following data:

Phase Description	Actual Finish Date
Public Hearing	
Letting	04/27/2016

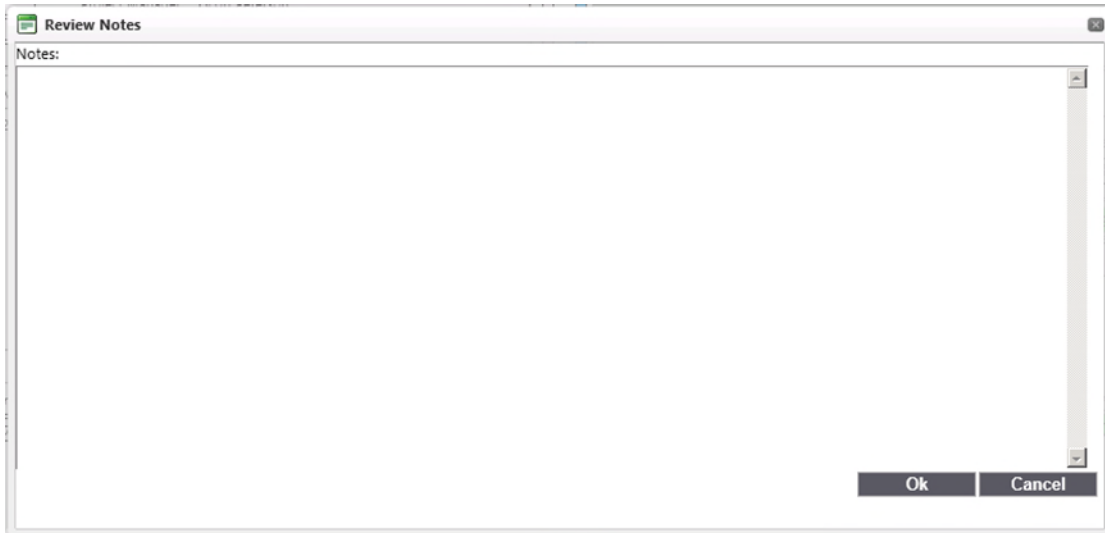
Below the table, there is a "Description" field with the text: "Letting has been moved from 3/30/2016 to 4/27/2016 to accommodate a 60-day advertisement period." There is also an "Attachments" section with an "Add Document" button and a table of documents:

Document Name	Description	Uploaded by	View	Remove
EDR Concurrence.mmg	EDR Concurrence	Lee-Shue-Ling	View	Remove
W_4307571_5K_0438.pdf	What if Schedule	Lee-Shue-Ling	View	Remove

Figure 29 Critical Schedule window

- Once the critical dates CR has been reviewed it can be approved, rejected, restarted or users can request clarification. (Restarted and request for clarification will be further explained in the following sections.). Click the appropriate button to complete the review.

4. A new window will pop up where notes can be entered. Enter any comments regarding the change request here.



5. Once it has been approved, the next person in the process will receive an email notifying them that the project is awaiting their review. The project manager will receive an FYI email as well. If it is rejected, the PM will receive an email notifying them that their request has been rejected and the reason why.

### 5.1.5 WPA Complete Review

1. To begin, select the project from the list. Once selected the Change Management Console is displayed.

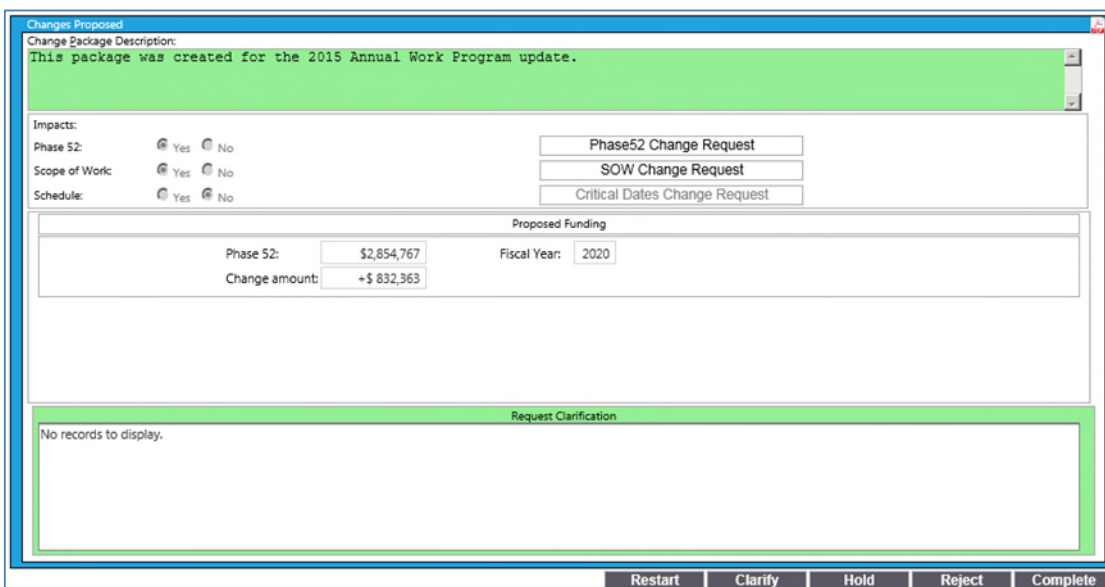
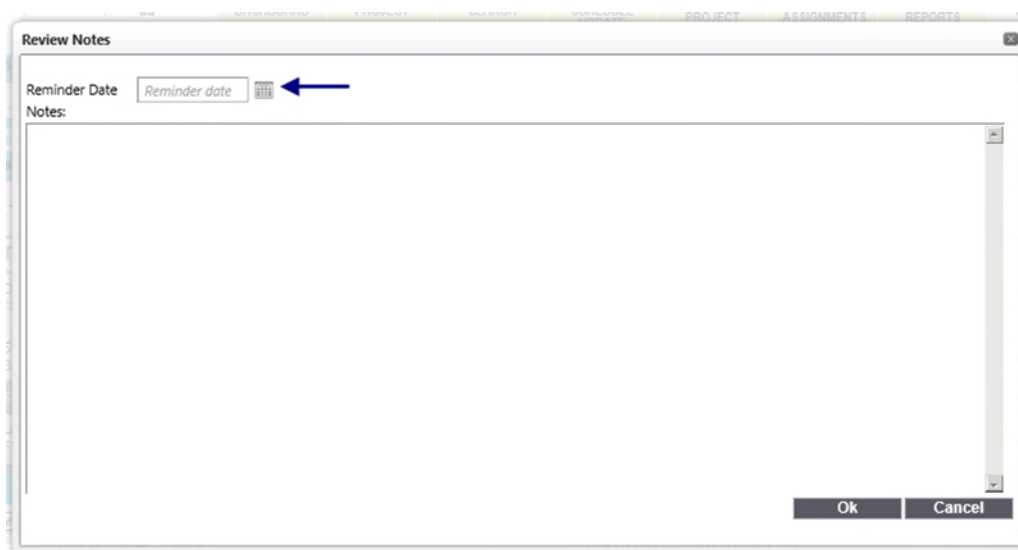


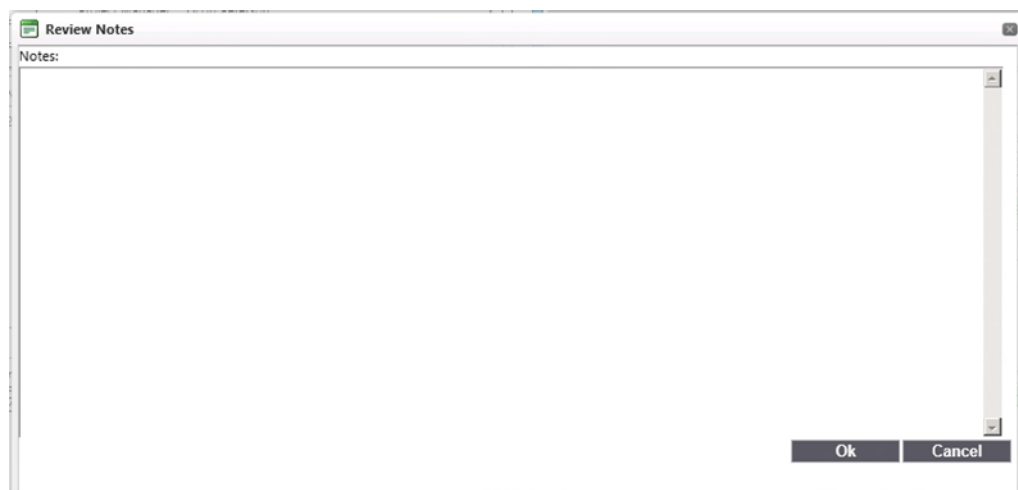
Figure 30 WPA Completion



- This is the final step in the process. The reviewer here has different options. To finalize the package select "Complete". There is also an option to place the package on hold. Placing a package on hold allows the user to finish reviewing the package and not enter it in the Work Program system. When the request is placed on hold, users can enter a reminder date in addition to notes. When a date is entered it is displayed on the project list. If the date is in the future and the status changes (approved/denied), the date is then removed. The reviewer will receive a notification containing a list of the current packages that have a WPA hold with an expired date. The package will remain on hold until the reviewer that placed it on hold either completes it, rejects it or restarts it.



- Once the WPA has been reviewed, the user selects "Complete" to finalize the package.
- A new window will pop up where notes can be entered. Enter any comments regarding the change request here.



- 5. Once it has been completed, the project manager will receive an FYI email letting them know that the package has been completed and is ready for the Work Program system. If it is rejected or placed on hold, the PM will receive an email notifying them that their request has been rejected/placed on hold and the reason why.

## 5.2 Requesting clarification

Reviewers can request clarification from a project manager prior to approving the change request. Request for clarification is a dialogue between the reviewer and the originator. All notes entered are entered and recorded as part of the change request. The request must be done prior to approving/rejecting.

To request clarification click the “Clarify” button. A notes window pops up where the user can enter their question.

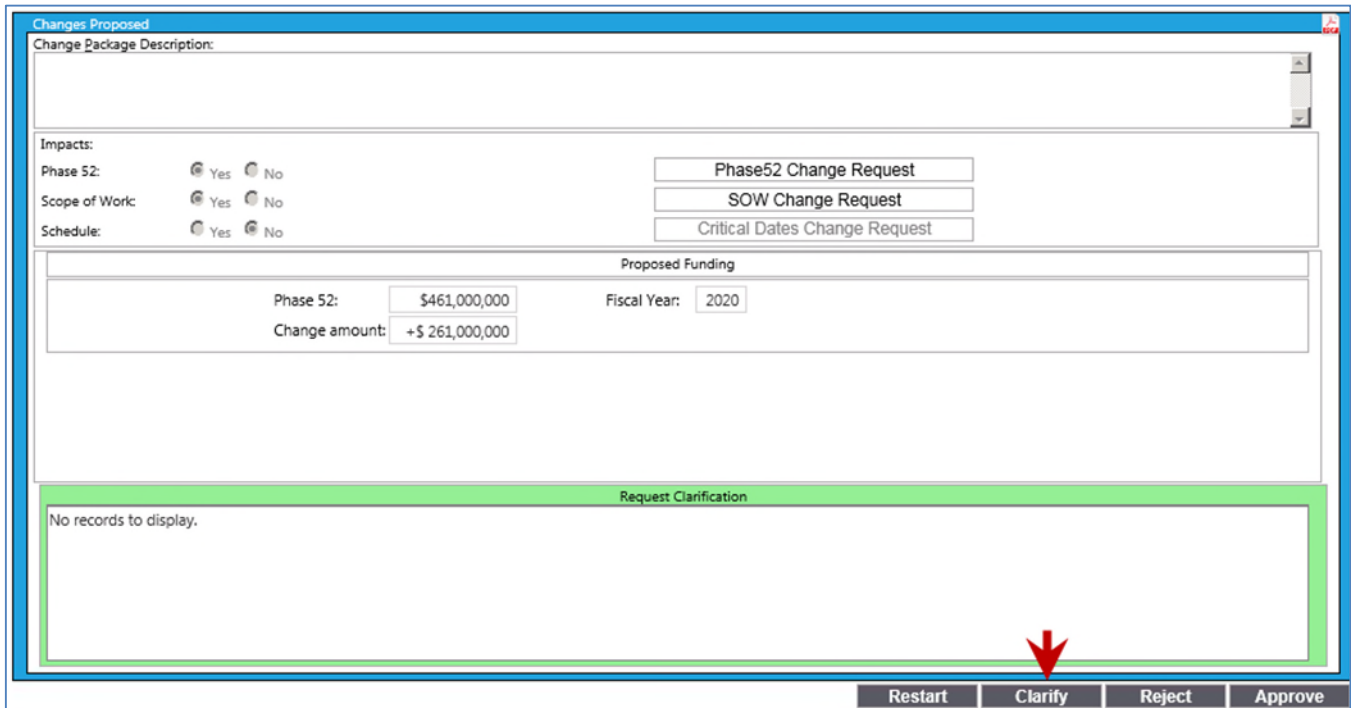


Figure 31 request clarification

Once the question/comments have been entered, click OK to send the clarification. The project manager will receive an email notifying them of the clarification request and the status of the package will change to “Pending Clarification”.



The project manager now goes to the WPUC Project list and opens the project. They will see a button that says “Clarify”. Clicking the button opens up the comment window.

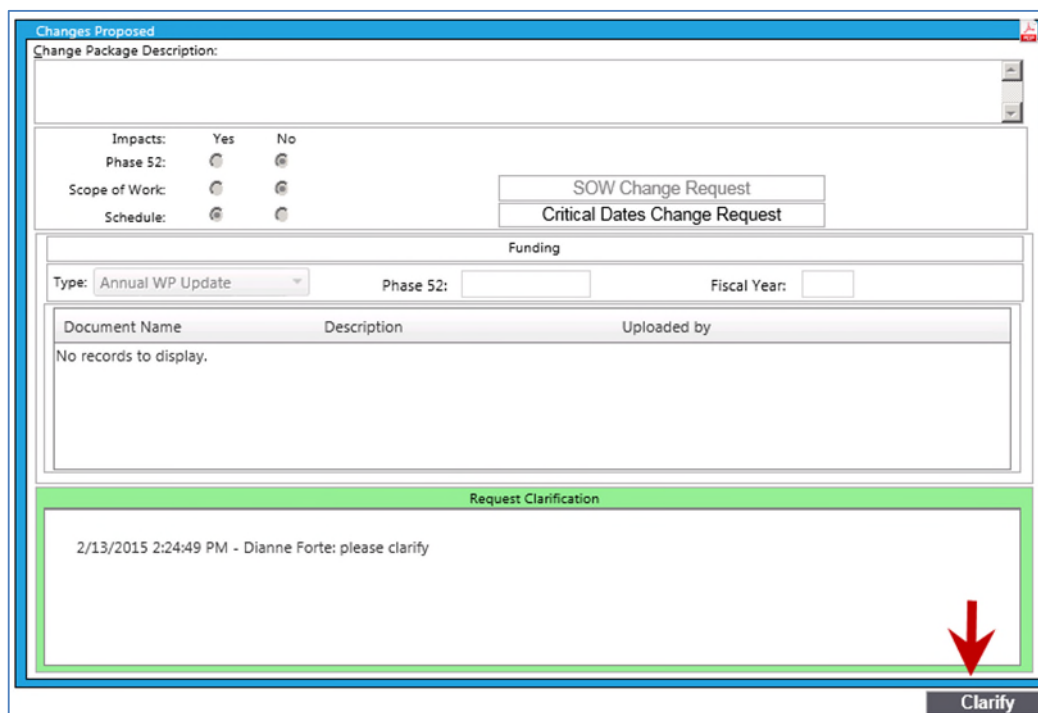
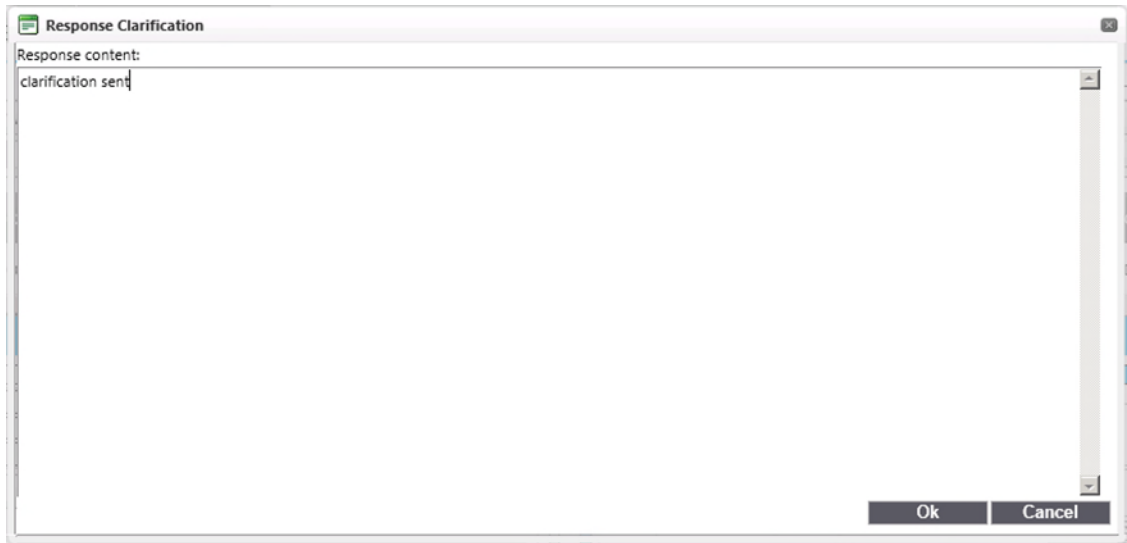


Figure 32 Responding to a clarification request

Once the response has been entered the user can click ok to complete the action. The reviewer will receive an email letting them know that the PM has responded to the clarification and the package is once again ready for their review. The status changes back to “In Review”.



All of the notes entered during the clarification requests are stored in the system and displayed in the CMC.

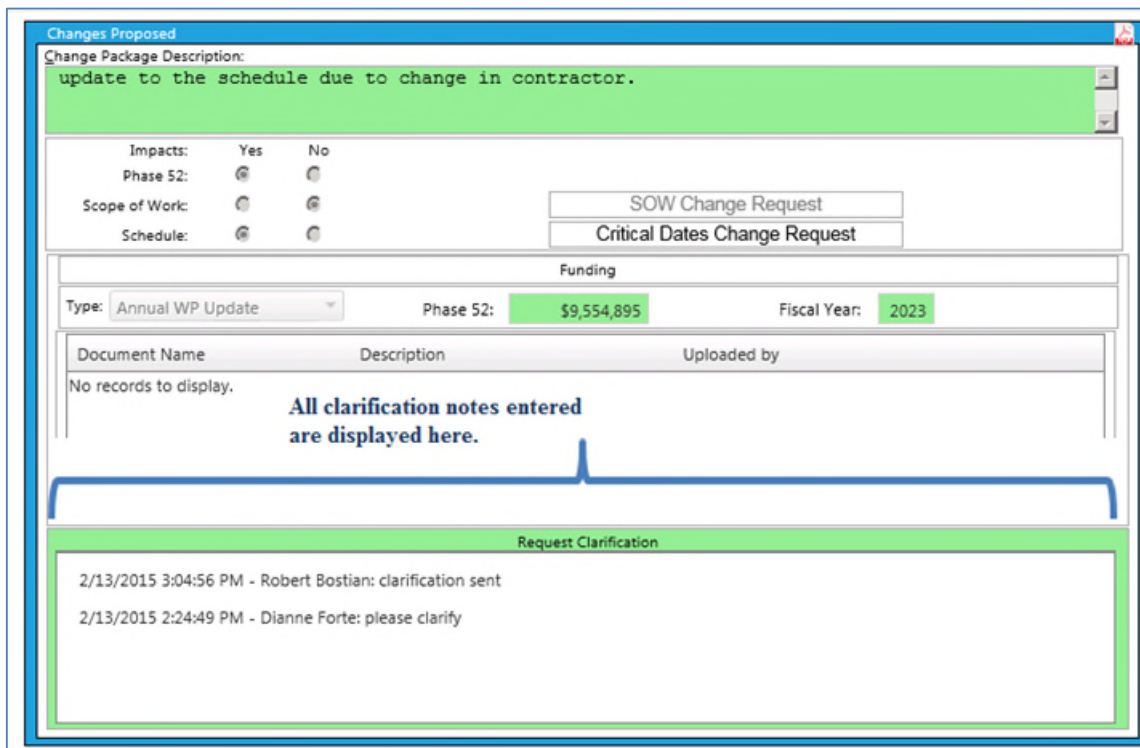


Figure 33 Clarification notes history

### 5.3 Restarting a package

Reviewers have the option to restart a change request package review. Restarting the package does just that, it sends it back to step one with a status of “Draft”. A package that

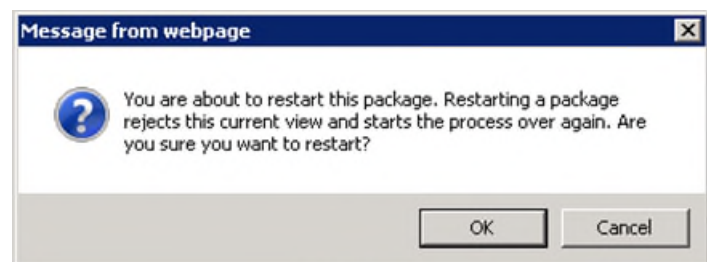
has been restarted requires that all of the reviewers complete each of their assignments again. A project that has been restarted, however, does not lose any of the history, documents or data that had been entered.

To restart a package, click the “Restart” button. A notes window pops up, allowing the user to enter notes as to why they are restarting the package.

The screenshot shows a web application window titled "Changes Proposed". At the top, a green banner contains a warning: "Production for strung projects 428731-1-52-01 and 430604-1-52-01 has already taken place. The project edit reports for both project numbers are herein attached." Below this, there are sections for "Impacts:" with radio buttons for "Yes" and "No" for "Phase 52:", "Scope of Work:", and "Schedule:". To the right are three buttons: "Phase52 Change Request", "SOW Change Request", and "Critical Dates Change Request". A "Proposed Funding" section contains input fields for "Phase 52:" (\$612,029), "Fiscal Year:" (2017), and "Change amount:" (\$0). At the bottom, a green banner says "Request Clarification" with "No records to display." Below this is a navigation bar with buttons for "Restart", "Clarify", "Reject", and "Approve". A red arrow points to the "Restart" button.

Figure 34 Restarting a package

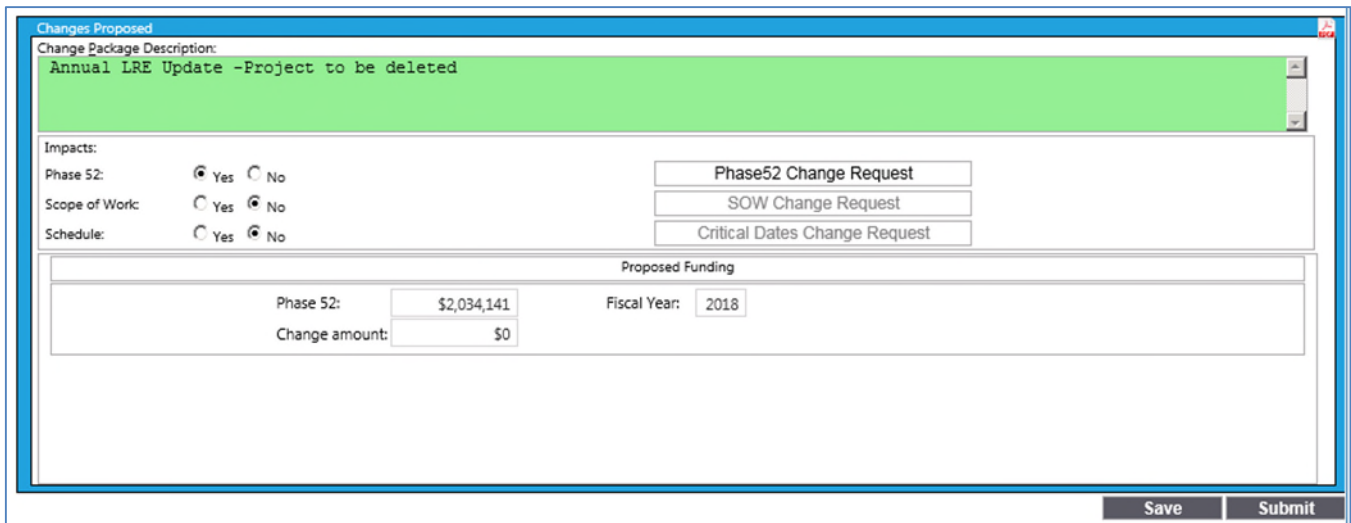
The reviewer receives a warning notifying them of the action. Click “Ok” to restart the package or “cancel” to return to the CMM window and continue. Once “Ok” is selected, the package is then restarted and will have to be submitted again to restart the review process. The project manager receives an email notification letting them know their package has been restarted and will need to be resubmitted.



### 5.3.1 Resubmitting a restarted package

Packages that have been restarted will not lose any of the prior entered information. Notice in [Figure 35](#) that the Phase 52 amount and fiscal year and the description entered are still there. At this point modifications to the package can be made and submitted for review again.

Once the necessary updates have been made, click “Submit” to resubmit the package.



The screenshot shows a web form titled "Changes Proposed". At the top, there is a green text area labeled "Change Package Description:" containing the text "Annual LRE Update -Project to be deleted". Below this, there are three sections: "Impacts:", "Proposed Funding", and a bottom bar with "Save" and "Submit" buttons.

**Impacts:**

Phase 52:	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="text" value="Phase52 Change Request"/>
Scope of Work:	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="text" value="SOW Change Request"/>
Schedule:	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="text" value="Critical Dates Change Request"/>

**Proposed Funding**

Phase 52:	\$2,034,141	Fiscal Year:	2018
Change amount:	\$0		

At the bottom right of the form are two buttons: "Save" and "Submit".

Figure 35 Resubmitting a restarted package

### 5.3.2 Viewing the package history

Everything that happens to a change request package is recorded in the history. The history displays all of the reviewers, their notes, any clarification requests, and many other details of the package. The history is listed at the bottom of every change request package, below the CMC.

Date	Assigned User	Information	Step	Result	Comment
05/06/2015 10:00:12 AM		CHANGE PACKAGE	DRAFT	CREATED	
05/06/2015 10:47:42 AM		CHANGE PACKAGE	IN REVIEW	SUBMITTED	
04/08/2015 10:06:51 AM	Mark Madgar	REVIEW NOTES	ESTIMATE APPROVAL FRONT	RESTARTED	2015-4-8 Wednesday 10:06:51 - Per Request, returned project to PM to update version.
04/08/2015 10:33:03 AM		CHANGE PACKAGE	IN REVIEW	SUBMITTED	
04/13/2015 02:34:55 PM	Wilmar Castro	CLARIFICATION	ESTIMATE APPROVAL FRONT	REQUESTED	1. Confirm contract class, LRE and PSEE do not currently match. 2. LRE Version 3 has been assigned as primary.
04/17/2015 11:02:29 AM	Vanita Sami	CLARIFICATION	ESTIMATE APPROVAL FRONT	RESPONDED	contract class should be 7 design bid build, the project was originally design build, but I went into LRE to change it, not sure if it accepted the change, cause I had to click save couple of times.
04/17/2015 11:05:01 AM	Wilmar Castro	REVIEW NOTES	ESTIMATE APPROVAL FRONT	APPROVED	2015-4-17 Friday 11:05:01 - Contract class has been changed to 7. No further clarifications needed.

Figure 36 Change request package history

### 5.3.3 Viewing the workflow sequence

Users have the ability to see the entire workflow sequence of any package. Once a project has been selected the workflow details become available.

Project#	Description	Work Mix	FY of Letting	Ph52 Amount	Update Due	Reviewer	Status	Step
432323-1	SR-A1A/S OCEAN DR FROM MONROE STREET TO SHERIDAN STREET	0012-RESURFACING	2017	\$1,762,079	04/30/2015	Dianne Forte	IN REVIEW	SCOPE APPROVAL
433070-1	23RD STREET FROM TAMARIND AVENUE TO SPRUCE AVENUE	0205-SIDEWALK	2015	\$994,216	04/30/2015	Richard Creed	IN REVIEW	SCOPE APPROVAL

Figure 37 Viewing the workflow sequence

The active step in the workflow will be displayed in blue. Any of the boxes that have dark text lets the user know that a workflow exists for that area. If it is grayed out the user quickly knows there has no change request of that type submitted as part of the package.

Clicking through each of the boxes displays the name of each person(s) that is a reviewer. Reviewers that have completed their task will be listed in gray, as shown below. If there are multiple reviewers assigned, each one will be listed in sequential order.

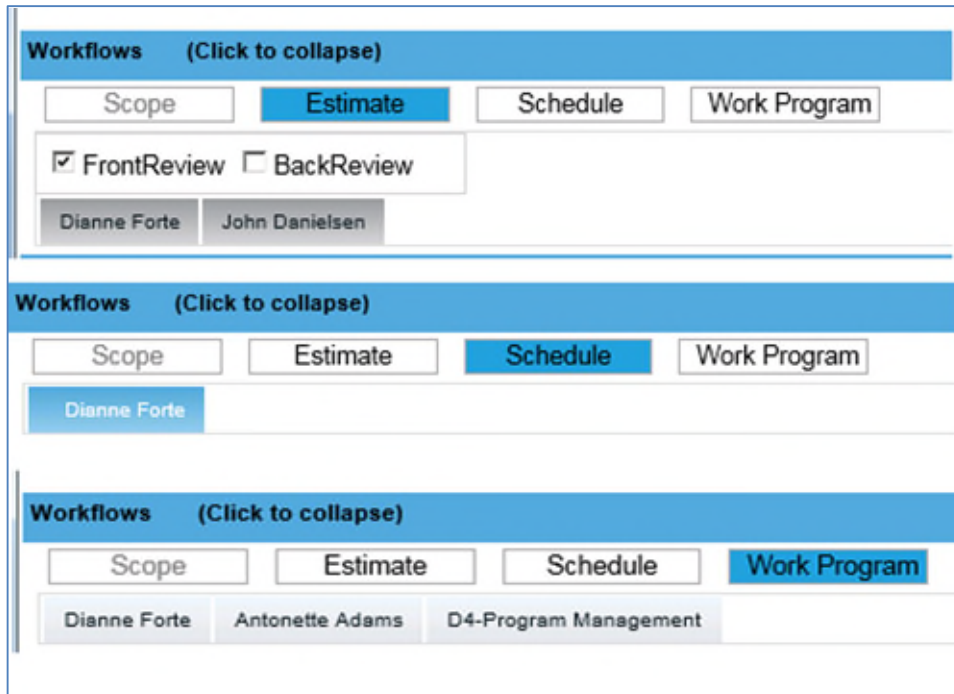


Figure 38 Workflow sequence details

From here users can also view the notes entered by other reviewers. To view the notes, click on the name that is listed in gray and the notes entered will pop up, as shown below. The comment entered is displayed as well as the date and time it was entered.

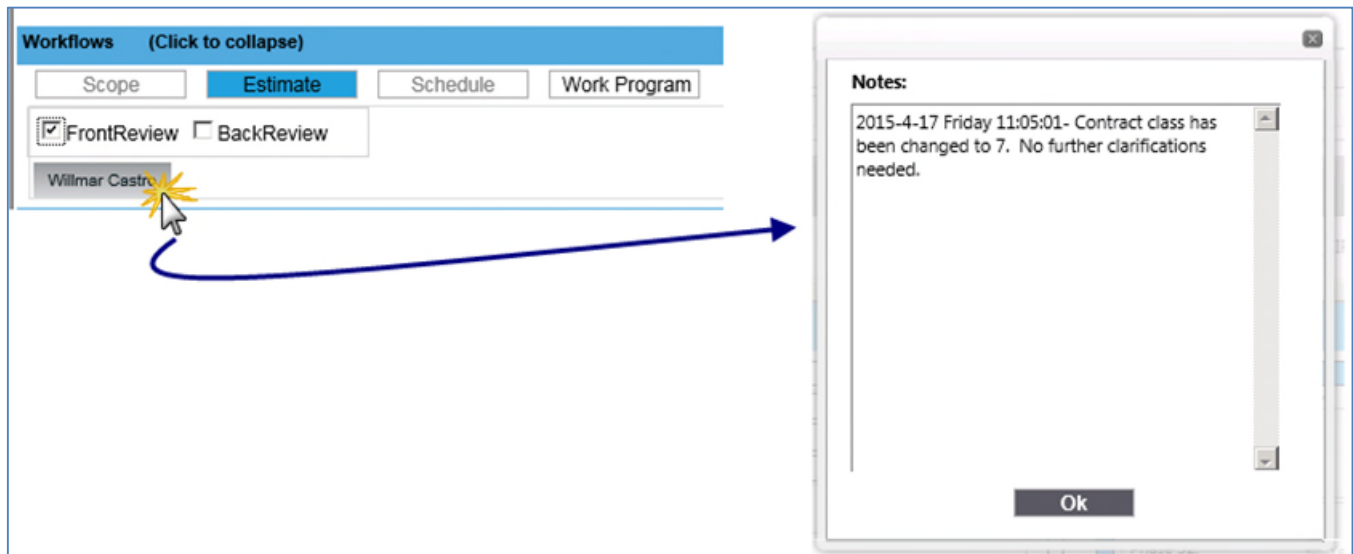


Figure 39 Viewing reviewer notes







## 6 Appendix 1: Definitions, acronyms and abbreviations

Term	Definition
PSEE	Project Suite Enterprise System
WPUC	Work Program Update Cycle
YUL	Yearly Update List
CMC	Change Management Console
CR	Change Request
SOW	Scope of work

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## 7 Appendix 2: Yearly Update List logic

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- Fiscal Year = Current Calendar Year +1
- Include if:
  - Funding occurs in a Fiscal Year GREATER THAN OR EQUAL TO the Fiscal Year identified in Fiscal Year Logic
  - Phase Group = 5 Phase Type = 2 (52)
  - Projects in Your Managing District
  - Projects in Your Geographic District
  - WP Status LESS THAN 30
- Exclude
  - Push Button Contracts
  - Item Status 3 (Dropped/Transferred)
  - Contract Class = 8
  - Program Type = ZZ
  - Fund Codes Beginning with “\*”
  - Fund Code = FCO
- Project Containing NULL Value in PDC