

# The Scheduling Request Module

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## Requesting Privileges in the Scheduling Module

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

Request Privileges										
	D1	D2	D3	D4	D5	D6	D7	TP	CO	
Change Requests										
Scheduling										
Set Schedule Lock Through Date	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Complete Schedule Activity Change	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Request Schedule Activity	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="button" value="Request"/> <input type="button" value="Cancel"/>										

**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 the *Request Schedule Activity* privilege for your projects only.

### The Scheduling Request Module:

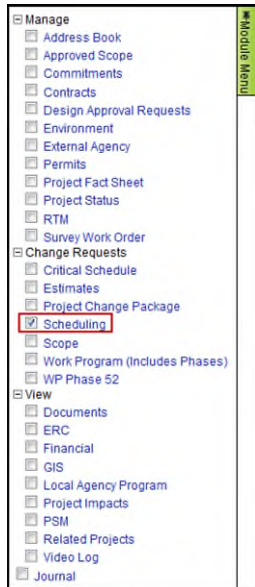
- Allows the PSEE User with privilege to *document* and *submit* updates to **multiple Activities** for **one project**.
- Allows for the PSEE User with privilege (Scheduler) to *document* and *complete* updates to **multiple Activities** for **one project**.

**Note:** The Scheduling on the Main Menu is not covered within this help document. For information on the Scheduling – Global View, refer to the [Scheduling – Global View](#) Help Document.

## The Scheduling Request Module

This module allows users to manage Scheduling Requests for a project. Scheduling Requests are then reviewed by the Scheduler who determines whether to make the changes in Primavera. All supporting documentation for the Scheduling Request can be loaded into PSEE.

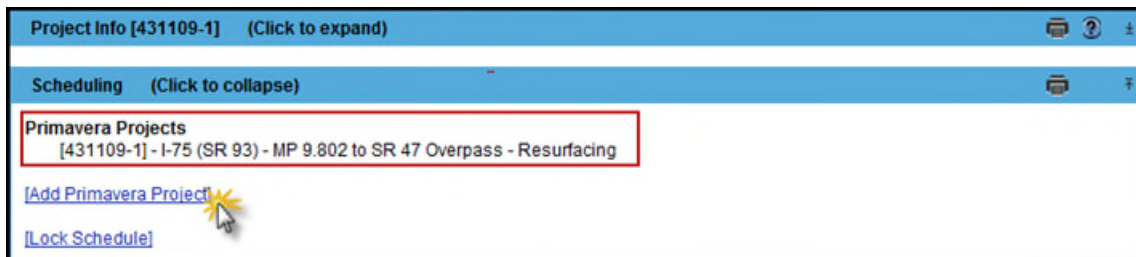
To initiate Primavera Schedule and Change Requests or Request a New Primavera Activity, select Scheduling under Change Requests in the Module Menu. The Scheduling module will be displayed.



## Associating the Primavera Project

PSEE displays the associated Primavera Project for the PSEE Project, if a match can be made programmatically. When a Primavera Project is associated, any Scheduling activities created in Primavera are displayed in PSEE. If the Project is associated and Activities are displayed correctly, then no additional action is needed to associate the Primavera Project.

**Note:** If a Primavera Project is not found or an additional Primavera Project needs to be added in PSEE, the PSEE Project Manager has the access to the **Add Primavera Project** hyperlink to add. Other Users must be granted the *Request Schedule Activity* access/privilege to have the **Add Primavera Project** hyperlink displayed.



1. Click on the **Add Primavera Project** hyperlink to enter a Primavera Project to be associated.
2. Select the Project to be associated.



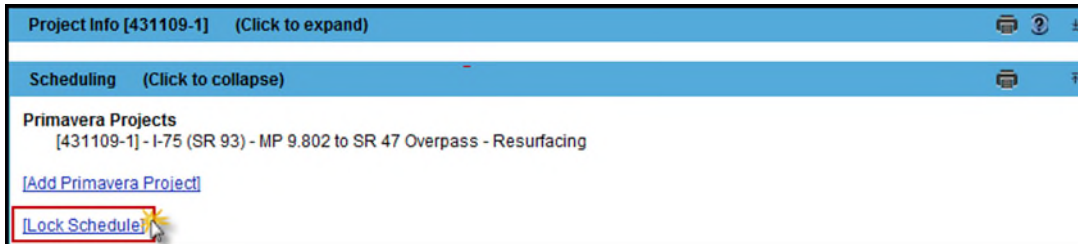
3. Click on Save and the selected project is associated and any Primavera activities for that project will be displayed.

## Locking the Primavera Schedule and Change Requests

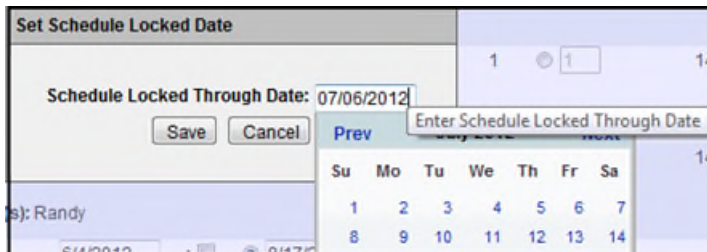
**Note:** The User that has been granted the *Set Schedule Lock Through Date* access/privilege will be able to lock down to stop any Primavera Activity Requests from being made in PSEE for a set period of days. The PSEE Project Manager does not have this privilege automatically.

PSEE displays the associated Primavera Project Schedule and activities.

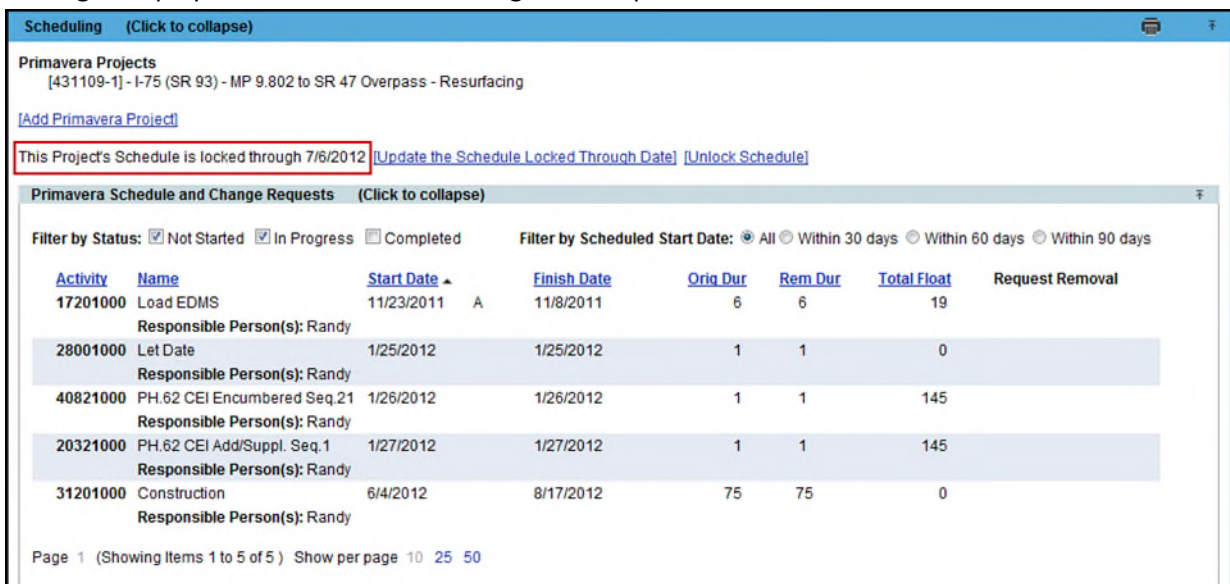
1. If there is a time period when a User may want to stop all requests for changes to scheduled Primavera activities or stop requests for new Schedule activities on a Project in PSEE, the User clicks on the **Lock Schedule** hyperlink.



2. The User can enter a date or select a date from the calendar displayed and click on Save.



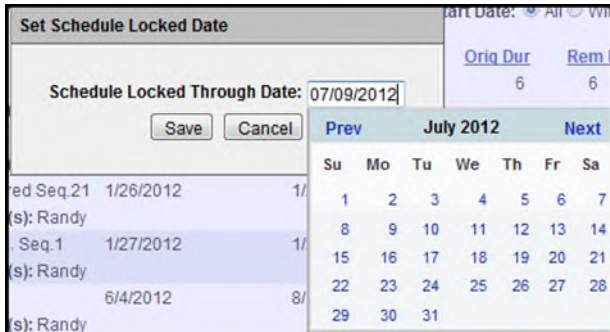
3. The Project Schedule is locked and no Activities can be updated. The **Request New Activity** hyperlink is no longer displayed until the Locked Through Date is past.



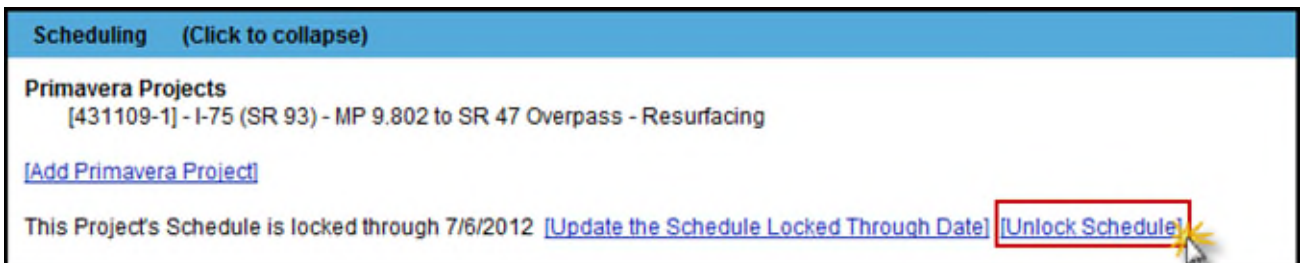
- Click on the **Update the Schedule Locked Through Date** hyperlink to edit the Date.



- Change the date and click on Save.



- Click on the **Unlock Schedule** hyperlink to unlock the Schedule in PSEE and allow updates to be made to Activities again.



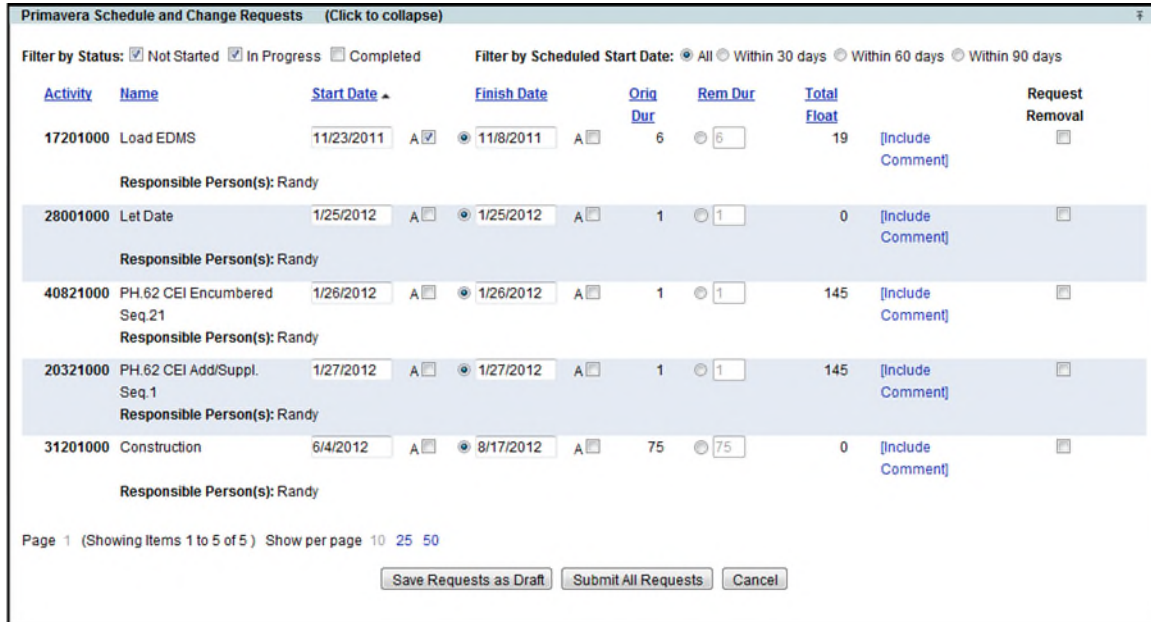
- Once the Lock Through Date is past, the lock will be released. The current Activities are open for update again and the **Request New Activity** hyperlink is displayed again to the PSEE Project Manager or the user with privilege.

## Primavera Schedule and Change Requests

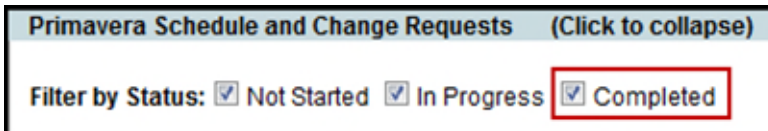
When a Primavera Project is associated to a PSEE project, the Activities found in Primavera are displayed in PSEE.

**Note:** The PSEE Project Manager has update privilege to the Activities in the Primavera Schedule and Change Requests subsection. Other Users must be granted the *Request Schedule Activity* access/privilege to have update privilege to the displayed Activities.

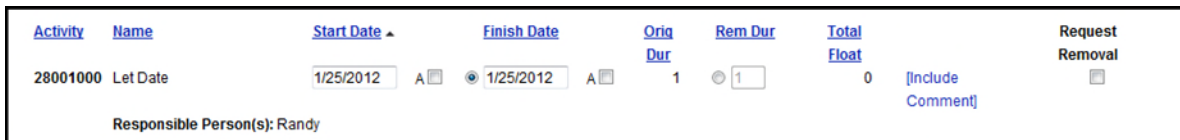
1. The Primavera Schedule and Change Requests subsection is displayed.



2. The Activities displayed by default are the ones that are not started and are in progress. The **Filter by Status** can be changed to display completed Activities also by checking the Completed check box.



3. The **Filter by Scheduled Start Date** displays all Start Dates by default (for selected Status). The display can be managed by selecting a radio button to display Start Dates beginning within the last 30 days, the last 60 days, or the last 90 days.
4. The Activity information from Primavera is displayed based on the filters selected.



- Activity Number – Read-only Activity Number displayed from Primavera.
- Activity Name - Read-only Activity Name displayed from Primavera.

- Start Date **[Updateable]** – Start Date in the future can be updated to a different future date. Any change of Start Date to past date must be used with the Start Date Actual Indicator. Change Request in Draft is displayed on new line.

31201000	Construction	6/4/2012	8/17/2012
Responsible Person(s): Randy			
Change Request created by MARTHA		6/4/2012	9/17/2012
KIRKLAND, Currently in Draft		<input checked="" type="checkbox"/>	<input type="checkbox"/>

- Start Date Actual Indicator – Required when changing a Start Date to a past Actual date.

- Finish Date **[Updateable]** – Finish Date in the future can be updated to a different future date. Any change of Finish Date to past date must be used with the Finish Date Actual Indicator. Change Request in Draft is displayed on new line.

31201000	Construction	6/4/2012	8/17/2012
Responsible Person(s): Randy			
Change Request created by MARTHA		6/4/2012	9/17/2012
KIRKLAND, Currently in Draft		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

- Finish Date Actual Indicator - Required when changing a Finish Date to a past Actual date.

- Original Duration – Read-only field that is computed based on the Finish Date minus the Start Date to provide the number of days for Activity duration.

<a href="#">Start Date</a>	<a href="#">Finish Date</a>	<a href="#">Orig Dur</a>	<a href="#">Rem Dur</a>
1/25/2012	1/25/2012	1	1

- Remaining Duration – When Remaining Duration days are entered, the Finish Date is protected and computed based on the number of days for Remaining Duration added to the Start Date.
- Total Float – The Total Float for the Activity indicates the amount of time that a schedule activity can be delayed without delaying the early start date of any immediately following schedule activities.
- [Include Comment] – Click on **Include Comment** hyperlink to open a Comment field for input that is specific to the Activity.

31201000	Construction	6/4/2012	09/17/2012	75	75	0	<a href="#">Include Comment</a>
Responsible Person(s): Randy							
79 of 2000							
Construction Activity is extended due to delays caused by Tropical Storm Debby.							

- Request Removal check box – If the Activity needs to be removed from Primavera, place a check in the Request Removal check box on the same row as the Activity.

Request Removal
<input checked="" type="checkbox"/>

- Responsible Person(s) – Read-only field that displays the Responsible Person that is named in Primavera.

31201000	Construction	6
Responsible Person(s): Randy		

- If changes made to the Activities are not ready for submission, then click on the **Save Requests as Draft** button. This will save the changes in PSEE, but the changes will not be submitted. (See next section)

Save Requests as Draft	Submit All Requests	Cancel
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- If changes made to the Activities are complete, then click on the **Submit All Requests** button. This will save the changes in PSEE and submit the changes.

Save Requests as Draft	Submit All Requests	Cancel
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- If all changes to all Activities should be removed, then click on the **Cancel** button. This will return the Activities to their original state before any changes.

Save Requests as Draft	Submit All Requests	Cancel
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### Saving Requests as Draft

Any changes that have been entered on an Activity may be saved as a Draft by clicking on the **Save Requests as Draft** button. **To Save as Draft** helps to identify invalid date entries that would not be allowed to be made in Primavera.

- Each Activity expands to display the current information with the proposed changes to the Start Date with Actual indicator, Finish Date with Actual indicator, Comments, and Remaining Duration along with any Comments entered on that Activity.

Activity	Name	Start Date	Finish Date	Orig Dur	Rem Dur	Total Float	Request Removal
28001000	Let Date	1/25/2012	1/25/2012	1	1	0	
Responsible Person(s): Randy							
Change Request created by MARTHA KIRKLAND, Currently in Draft							
		7/2/2012	7/6/2012				<a href="#">Cancel Request</a> <a href="#">Submit Request</a>
<a href="#">Include Comment</a>							

- The Change Request information can continue to be edited, but click on the **Save Requests as Draft** button again to save changes.

Save Requests as Draft
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- If changes of one Activity need to be canceled, click on the **Cancel Request** hyperlink. The Activity is restored to original information.

Activity	Name	Start Date	Finish Date	Orig Dur	Rem Dur	Total Float	Request Removal
28001000	Let Date	1/25/2012	1/25/2012	1	1	0	
Responsible Person(s): Randy							
Change Request created by MARTHA KIRKLAND, Currently in Draft							
		7/2/2012	7/6/2012				<a href="#">Cancel Request</a> <a href="#">Submit Request</a>
<a href="#">Include Comment</a>							

- If changes of one Activity are ready to be submitted, click on the **Submit Request** hyperlink. Only this change on this Activity is submitted.

Activity	Name	Start Date	Finish Date	Orig Dur	Rem Dur	Total Float	Request Removal
28001000	Let Date	1/25/2012	1/25/2012	1	1	0	
Responsible Person(s): Randy							
Change Request created by MARTHA KIRKLAND, Currently in Draft							
		7/2/2012	7/6/2012				<a href="#">Cancel Request</a> <a href="#">Submit Request</a>
<a href="#">Include Comment</a>							

## Submitting Multiple Requests

When multiple changes have been saved in Draft or multiple changes are ready for submission, the changes to multiple Activities can be submitted at the same time.

1. Click on the **Submit All Requests** button.

Primavera Schedule and Change Requests (Click to collapse)

Filter by Status:  Not Started  In Progress  Completed Filter by Scheduled Start Date:  All  Within 30 days  Within 60 days  Within 90 days

Activity	Name	Start Date	Finish Date	Orig Dur	Rem Dur	Total Float	Request Removal
17201000	Load EDMS Responsible Person(s): Randy Change Request created by JIMMY PITMAN, Currently in Draft	11/23/2011 A	11/8/2011	6	6	19	
		11/23/2011 A	12/1/2011 A				[Cancel Request] [Submit Request]
28001000	Let Date Responsible Person(s): Randy Change Request created by JIMMY PITMAN, Currently in Draft	1/25/2012 A	1/25/2012 A	1	1	0	
40821000	PH.62 CEI Encumbered Seq.21 Responsible Person(s): Randy Change Request created by JIMMY PITMAN, Currently in Draft	1/26/2012 A	1/26/2012 A	1	1	145	
20321000	PH.62 CEI Add/Suppl. Seq.1 Responsible Person(s): Randy Change Request created by JIMMY PITMAN, Currently in Draft	1/27/2012 A	1/27/2012 A	1	1	145	
31201000	Construction Responsible Person(s): Randy	6/4/2012 A	8/17/2012 A	75	75	0	[Include Comment]

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Save Requests as Draft Submit All Requests Cancel

2. The proposed changes are submitted, approved and ready to be completed.

Primavera Schedule and Change Requests (Click to collapse)

Filter by Status:  Not Started  In Progress  Completed Filter by Scheduled Start Date:  All  Within 30 days  Within 60 days  Within 90 days

Activity	Name	Start Date	Finish Date	Orig Dur	Rem Dur	Total Float	Request Removal
17201000	Load EDMS Responsible Person(s): Randy Change Request submitted by JIMMY PITMAN, Currently Approved and ready to be Completed	11/23/2011 A	12/1/2011 A	6	6	19	[Cancel Request] [Complete Request]
28001000	Let Date Responsible Person(s): Randy Change Request submitted by JIMMY PITMAN, Currently Approved and ready to be Completed	1/25/2012 A	1/25/2012 A	1	1	0	[Cancel Request] [Complete Request]
40821000	PH.62 CEI Encumbered Seq.21 Responsible Person(s): Randy Change Request submitted by JIMMY PITMAN, Currently Approved and ready to be Completed	1/26/2012 A	1/26/2012 A	1	1	145	[Cancel Request] [Complete Request]
20321000	PH.62 CEI Add/Suppl. Seq.1 Responsible Person(s): Randy Change Request submitted by JIMMY PITMAN, Currently Approved and ready to be Completed	1/27/2012 A	1/27/2012 A	1	1	145	[Cancel Request] [Complete Request]
31201000	Construction Responsible Person(s): Randy	6/4/2012 A	8/17/2012 A	75	75	0	[Include Comment]

Page 1 (Showing Items 1 to 5 of 5) Show per page 10 25 50

Save Requests as Draft Submit All Requests Cancel

## Completing Requests

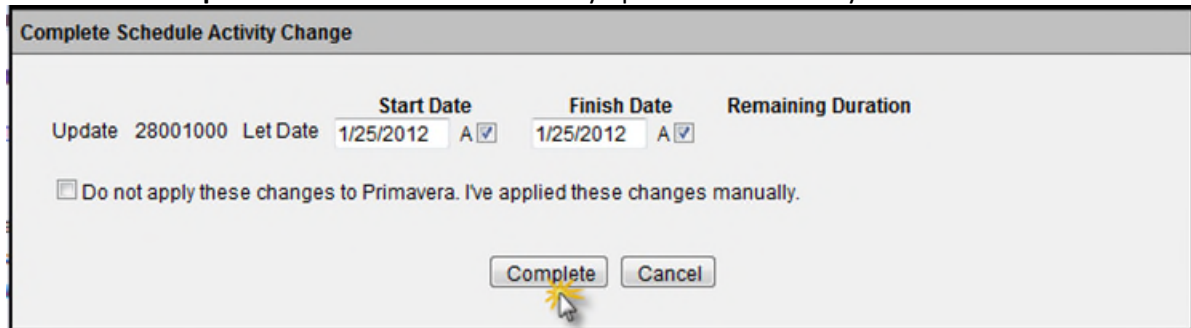
When proposed Schedule Requests have been submitted and are ready to be updated in Primavera, the Completion of a Request must be done individually for each changed Activity.

**Note:** The User must have the *Complete Schedule Activity Change* privilege in order to have the **Complete Request** hyperlink. The PSEE Project Manager does not have this privilege automatically.

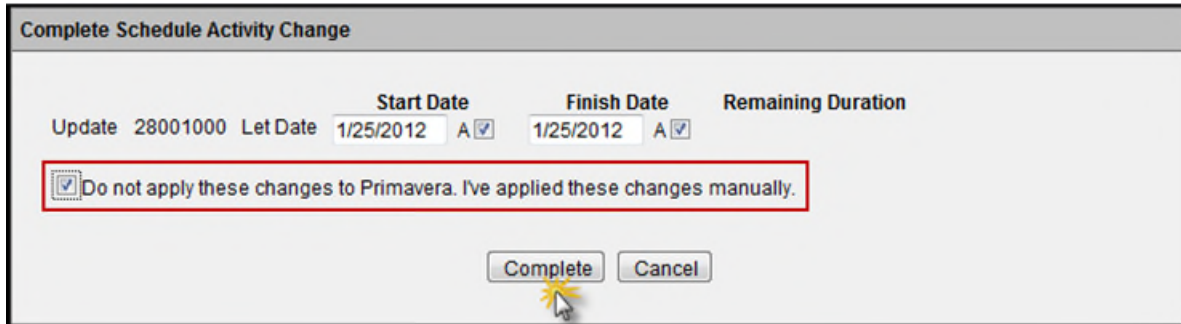
1. Select the **Complete Request** hyperlink beside the submitted Activity.



2. Click on the **Complete** button to make the Activity update automatically in Primavera



Or if the Scheduler wants to make the changes manually in Primavera, then click on the check box labeled 'Do not apply these changes to Primavera. I've applied these changes manually.' before clicking on the **Complete** button.



3. The last subsection titled **Completed Requests** displays all proposed changes that have been Approved and Completed. The Requestor and Completed by fields are populated. Approved but not completed Activities are also displayed.

Activity	Action	Status	Requestor	Start Date	Finish Date	Duration	Completed By
28001000 - Let Date	Replace	Completed	JIMMY PITMAN	1/25/2012 A	1/25/2012 A		RANDALL MARKHAM
17201000 - Load EDMS	Replace	Completed	JIMMY PITMAN	11/23/2011 A	12/1/2011 A		MARTHA KIRKLAND
40821000 - PH.62 CEI Encumbered Seq.21	Replace	Approved	JIMMY PITMAN	2/20/2012 A	2/20/2012 A		
20321000 - PH.62 CEI Add/Suppl. Seq.1	Replace	Approved	JIMMY PITMAN	2/20/2012 A	2/20/2012 A		

## Request Activity Removal

A Schedule request to remove an Activity from a project can be indicated in PSEE for a Scheduler to take action in Primavera.

**Note:** The PSEE Project Manager has update privilege to mark Activities for Removal in the Primavera Schedule and Change Requests subsection. Other Users must be granted the *Request Schedule Activity* access/privilege to have update privilege to the displayed Activities.

1. A check may be placed in the Request Removal column beside an Activity to mark it for Removal. (Please note that any Activity that has been submitted with a change cannot be marked for Removal until the Request is Completed or Canceled.)

Primavera Schedule and Change Requests (Click to collapse)

Filter by Status:  Not Started  In Progress  Completed      Filter by Scheduled Start Date:  All  Within 30 days  Within 60 days  Within 90 days

Activity	Name	Start Date	Finish Date	Orig Dur	Rem Dur	Total Float	Request Removal
28001000	Let Date	1/25/2012	1/25/2012	1	1	0	<input checked="" type="checkbox"/>
Responsible Person(s): Randy							
40821000	PH.62 CEI Encumbered Seq.21	1/26/2012	1/26/2012	1	1	145	
Responsible Person(s): Randy							
Change Request submitted by JIMMY PITMAN, Currently Approved and ready to be Completed							<a href="#">[Cancel Request]</a> <a href="#">[Complete Request]</a>

2. Click on the Submit All Requests button.

Save Requests as Draft    Submit All Requests    Cancel

3. The Activity Removal Request is approved and ready for the Scheduler to complete in Primavera.

Primavera Schedule and Change Requests (Click to collapse)

Filter by Status:  Not Started  In Progress  Completed      Filter by Scheduled Start Date:  All  Within 30 days  Within 60 days  Within 90 days

Activity	Name	Start Date	Finish Date	Orig Dur	Rem Dur	Total Float	Request Removal
28001000	Let Date	1/25/2012	1/25/2012	1	1	0	
Responsible Person(s): Randy							
Activity Removal requested by RANDALL MARKHAM, Currently Approved and ready to be Completed							<a href="#">[Cancel Request]</a> <a href="#">[Complete Request]</a>

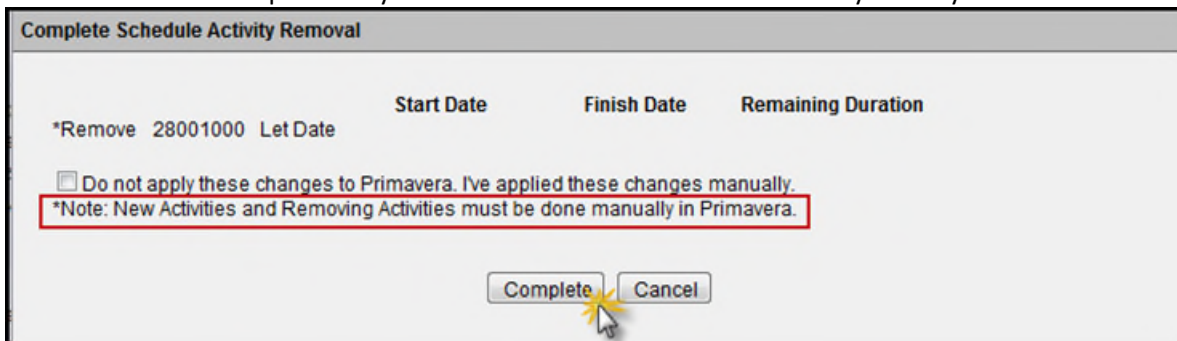
## Completing the Removal of Primavera Activity Requests

The **Complete Request** hyperlink is displayed to users with the *Complete Schedule Activity Change* access/privilege. The User is a Primavera **Scheduler** that is responsible for the removal of Activity Requests. The PSEE Project Manager does not have this privilege automatically.

1. Select the **Complete Request** hyperlink beside the Activity marked for removal. Or Select the **Cancel Request** hyperlink to cancel the Activity Removal Request.



2. The Scheduler clicks on the **Complete** button to mark that the Activity will be or has been removed in Primavera. It is the responsibility of the Scheduler to remove the Activity directly in Primavera.



3. The Activity is marked with an Action of Remove and a Status of Completed in the Completed Requests section.

Completed Requests (Click to collapse)

Activity	Action	Status	Requestor	Start Date	Finish Date	Duration	Completed By
28001000 - Let Date	Remove	Completed	RANDALL MARKHAM				MARTHA KIRKLAND
17201000 - Load EDIMS	Replace	Completed	JIMMY PITMAN	11/23/2011 A	12/1/2011 A		MARTHA KIRKLAND
40821000 - PH.62 CEI Encumbered Seq.21	Replace	Approved	JIMMY PITMAN	2/20/2012 A	2/20/2012 A		
20321000 - PH.62 CEI Add/Suppl. Seq.1	Replace	Approved	JIMMY PITMAN	2/20/2012 A	2/20/2012 A		

4. The Activity stays in the Primavera Schedule and Change Requests section in PSEE until the removal has been completed in Primavera and updated in PSEE.

## Creating a new Primavera Activity Request

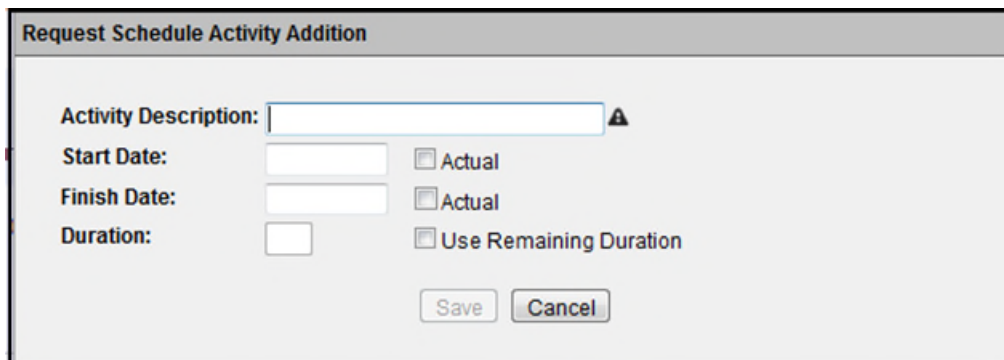
The **Request New Activity** hyperlink is displayed to users with access/privilege. The PSEE Project Manager has the access to add the Scheduling Request. Other Users must be granted the *Request Schedule Activity* access/privilege.

1. Select the **Request New Activity** link.

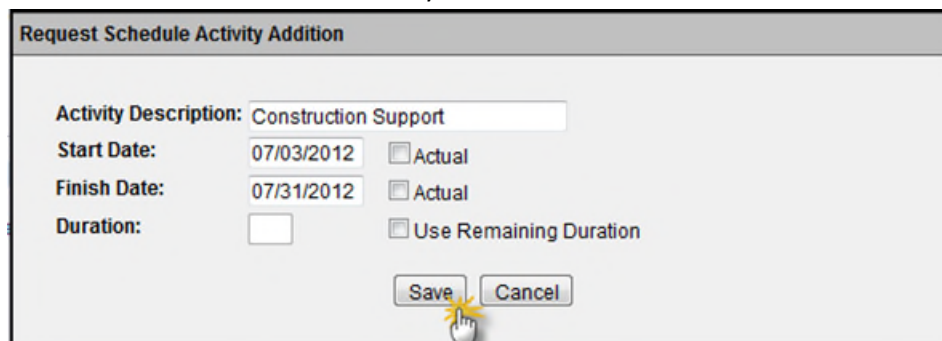


2. The Request Schedule Activity Addition window will appear. Complete the fields.

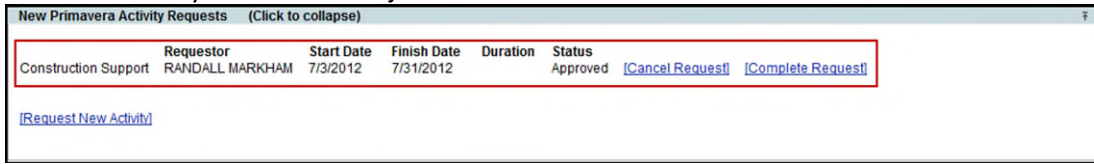
- Activity Description [Required]: Enter an Activity Description.
- Start Date: Start Date set to today or in the future can be set. Any setting of Start Date to past date must be used with the Start Date Actual Check box.
- Start Date Actual Check box: Required when setting a Start Date to a past Actual date.
- Finish Date: Finish Date can be set to a future date. Any change of Finish Date to past date must be used with the Finish Date Actual Indicator.
- Finish Date Actual Check box: Required when setting a Finish Date to a past Actual date.
- Duration: Days computed based on the Finish Date minus the Start Date to provide the number of days for activity duration. Protected field when Start Date and Finish Date is entered.
- Use Remaining Duration Check box: When checked, no Finish Date can be entered. Enter the number of days in the Duration field to calculate the Finish Date.



3. Click on Save to add the New Activity.



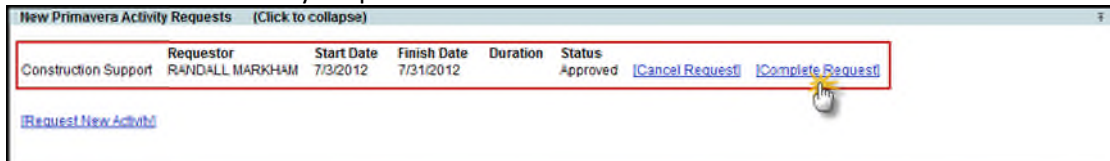
4. The New Activity is added to Project.



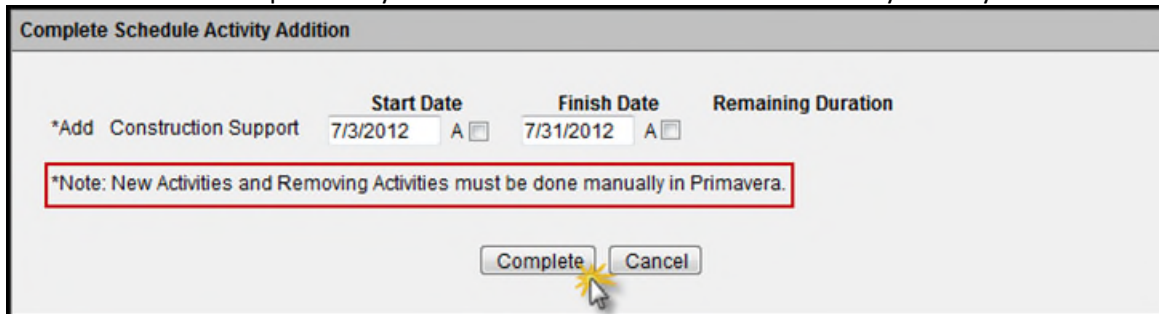
### Completing New Primavera Activity Requests

The **Complete Request** hyperlink is displayed to users with the *Complete Schedule Activity Change* access/privilege. The User is a Primavera **Scheduler** that is responsible for completing Activity Requests. The PSEE Project Manager does not have this privilege automatically.

1. Select the **Complete Request** hyperlink beside the new Activity. Or Select the **Cancel Request** hyperlink to cancel the New Activity Request.



2. The Scheduler clicks on the **Complete** button to mark that the Activity will be or has been created in Primavera. It is the responsibility of the Scheduler to enter the new Activity directly in Primavera.



3. The new Activity is marked Completed in PSEE.

