



## Issues Training Guide

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## Contents

About.....	3
Process Overview .....	3
Change Management Use Cases.....	3
CES Shell Conditions.....	6
Step-by-Step Instructions.....	7
Enter Issue Item Details .....	7
Initiate Change Order.....	10

## About

The Issues application tracks all change events including CAMP RFIs, Bulletins, NODs, CICs and TCRs. The application also provides a consistent Change Issue (CI) Number for every document involved in the change event.

The Issues app tracks the completion of each CES phase and the associated CES Estimate (EST), Potential Change Order (PCO), Fair and Reasonable Estimate (FRE), and Change Order (CO) amounts. Following completion of the CES process, the CAMP Change Order process is initiated.

## Process Overview

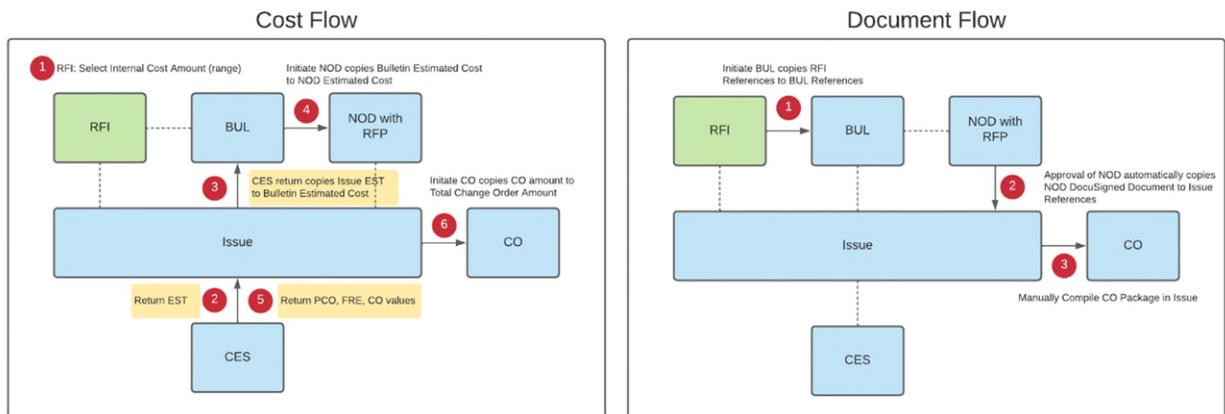
The originating document (RFI, Bulletin, NOD, CIC, TCR) is processed to create an Issue which is linked to the originating document. Any subsequent documents associated with that change event are referenced (linked) to the Issue document. The Issues app is also integrated with CES to create CES Shells and return CES dollar amounts to CAMP.

### Change Management Use Cases

There are six typical Use Cases from processing the change management documents:

- Initiated by a RFI with a Closure Status of Bulletin Required
- Initiated by a RFI with a Closure Status of NOD Required
- Initiated by a RFI resulting in a Disputed NOD
- Initiated by a Bulletin
- Initiated by a CIC
- Initiated by a TCR

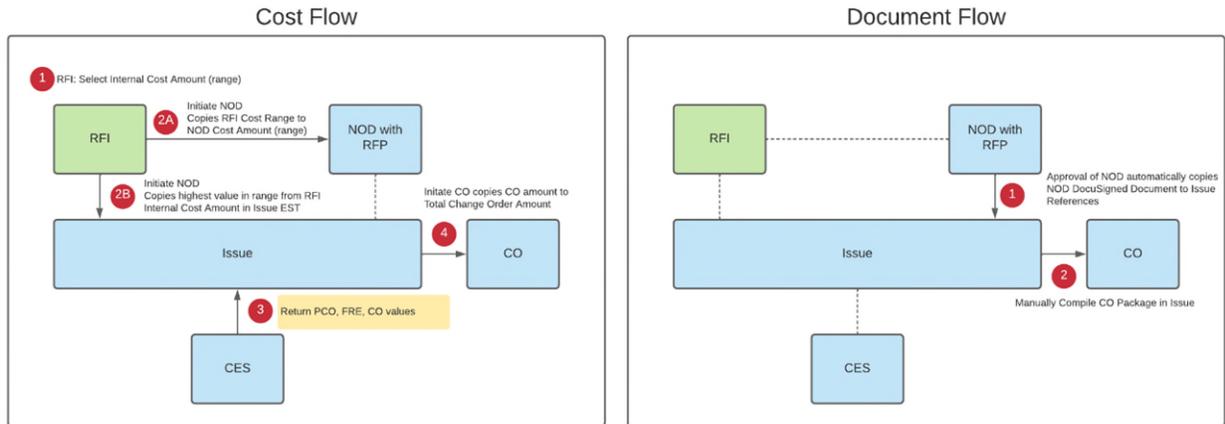
#### Initiated by a RFI with Closure Status of Bulletin Required



- The GC creates the RFI and initiates an Issue. CAMP links the Issue to the RFI.
- Once a determination is made that a Bulletin is required,
  - If the cost impact is yes, the AEoR selects an internal Cost Amount (range), see **Cost Flow 1**
  - The AEoR initiates a Bulletin, CAMP copies the RFI References to the Bulletin References, see **Document Flow 1**, and links the Bulletin to the Issue and RFI. The CES integration creates a CES Bulletin Estimate (EST) Shell.
- The Bulletin cannot be finalized until the CES integration returns the EST to the Issue, see **Cost Flow 2**, and CAMP copies the amount to the Bulletin Estimated Cost, see **Cost Flow 3**
- Once the Bulletin is final, the CM PM initiates a NOD, CAMP copies the Bulletin Estimated Cost to the NOD Estimated Cost, see **Cost Flow 4**, and links the NOD to the Issue and Bulletin.
- Once the NOD is approved, it is sent to the GC along with a statement to submit a Request for Proposal (RFP).
  - CAMP copies the DocuSign approved NOD to the Issue References, see **Document Flow 2**
  - The CES Integration creates a PCO Estimate Shell in CES.
  - The CES integration returns PCO, FRE, and CO values to the Issue, see **Cost Flow 5**

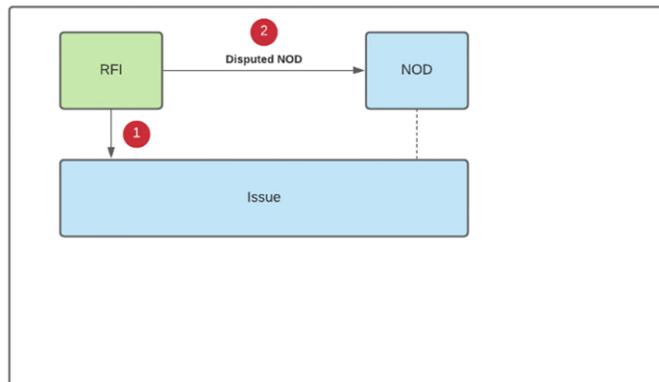
- The Change Order is initiated from the Issue. If the PCO is \$25K or less, the CM PM is the initiator. If the proposal is over \$25K, the Change Order Unit (COU) Lead Estimator is the initiator.
  - The initiator manually compiles the Change Order Package, see **Document Flow 3**
  - CAMP copies the Issue CO amount to the Change Order Total Amount, see **Cost Flow 6**

### Initiated by a RFI with Closure Status of NOD Required



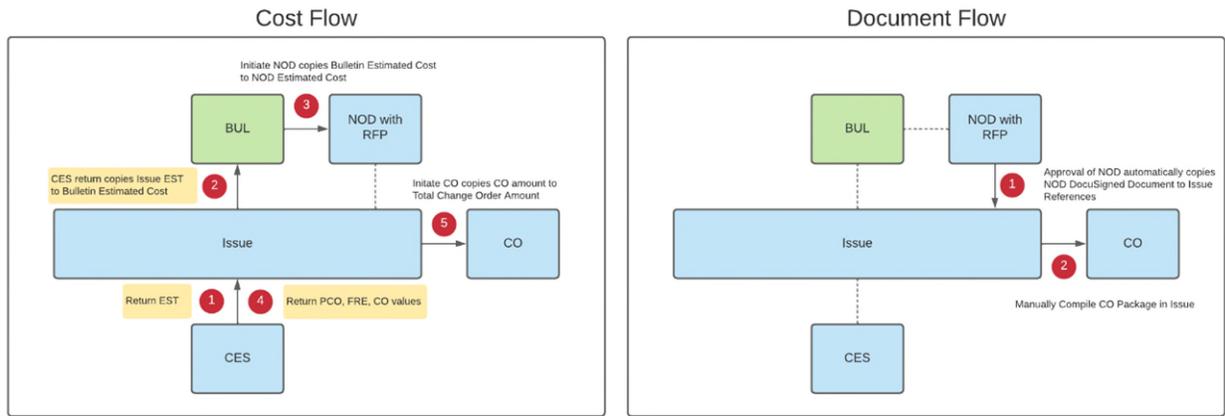
- The GC creates the RFI and initiates an Issue. CAMP links the Issue to the RFI.
- Once a determination is made that a NOD is required,
  - If the cost impact is yes, the CM PM selects an internal Cost Amount (range), see **Cost Flow 1**
  - The CM PM initiates a NOD, CAMP copies the RFI Cost Range to the NOD Cost Amount (range), see **Cost Flow 2A**, CAMP copies the highest value from the RFI Internal Cost Amount to the Issue EST, see **Cost Flow 2B**, and links the NOD to the Issue and RFI.
- Once the NOD is approved, it is sent to the GC along with a statement to submit a Request for Proposal (RFP).
  - CAMP copies the DocuSign approved NOD to the Issue References, see **Document Flow 1**
  - The CES Integration creates a PCO Estimate Shell in CES.
  - The CES integration returns PCO, FRE, and CO values to the Issue, see **Cost Flow 3**
- The Change Order is initiated from the Issue. If the PCO is \$25K or less, the CM PM is the initiator. If the proposal is over \$25K, the Change Order Unit (COU) Lead Estimator is the initiator.
  - The initiator manually compiles the Change Order Package, see **Document Flow 2**
  - CAMP copies the Issue CO amount to the Change Order Total Amount, see **Cost Flow 4**

### Initiated by a RFI resulting in a Disputed NOD



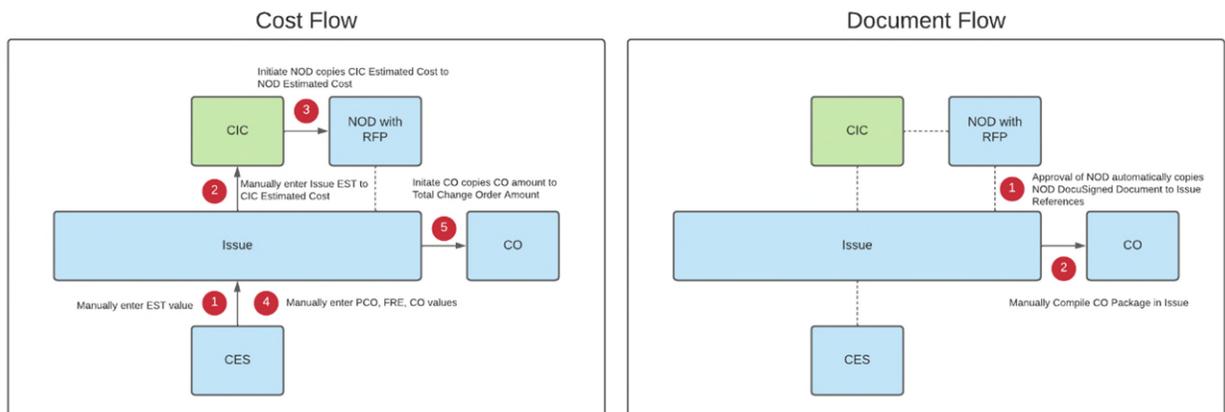
- The GC creates the RFI and initiates an Issue. CAMP links the Issue to the RFI.
- Once a final determination is made that a Bulletin or NOD are not required, the GC may request a Disputed NOD.
- The CM PM initiates a Disputed NOD.
- No further action is needed.

## Initiated by a Bulletin



- The AEO creates the Bulletin and initiates an Issue. CAMP links the Issue to the Bulletin.
- The CES integration creates a Bulletin Estimate (EST) Shell in CES.
- The Bulletin cannot be finalized until the CES integration returns the EST to the Issue, see **Cost Flow 1**, and CAMP copies the amount to the Bulletin Estimated Cost, see **Cost Flow 2**
- Once the Bulletin is final, the CM PM initiates a NOD, CAMP copies the Bulletin Estimated Cost to the NOD Estimated Cost, see **Cost Flow 3**, and links the NOD to the Issue and Bulletin.
- Once the NOD is approved, it is sent to the GC along with a statement to submit a Request for Proposal (RFP).
  - CAMP copies the DocuSign approved NOD to the Issue References, see **Document Flow 1**
  - The CES Integration creates a PCO Estimate Shell in CES.
  - The CES integration returns PCO, FRE, and CO values to the Issue, see **Cost Flow 4**
- The Change Order is initiated from the Issue. If the PCO is \$25K or less, the CM PM is the initiator. If the proposal is over \$25K, the Change Order Unit (COU) Lead Estimator is the initiator.
  - The initiator manually compiles the Change Order Package, see **Document Flow 2**
  - CAMP copies the Issue CO amount to the Change Order Total Amount, see **Cost Flow 5**

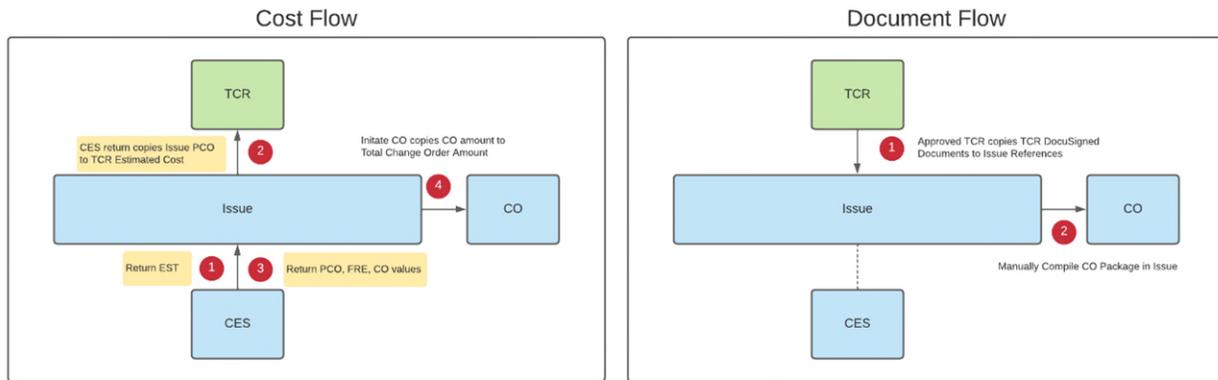
## Initiated by a CIC



- The CM PM or COU creates the CIC and initiates an Issue. CAMP links the Issue to the CIC.
- The CM PM or COU manually enters the EST value in the Issue, see **Cost Flow 1**, and the CIC Estimated Cost in the CIC, see **Cost Flow 2**
- The CM PM initiates a NOD. CAMP copies the CIC Cost Range to the NOD Cost Amount (range), see **Cost Flow 3**, and links the NOD to the CIC and Issue.
- Once the NOD is approved, it is sent to the GC along with a statement to submit a Request for Proposal (RFP).
  - CAMP copies the DocuSign approved NOD to the Issue References, see **Document Flow 1**
  - The CM PM or COU manually enters the PCO, FRE, and CO values in the Issue, see **Cost Flow 4**
- The Change Order is initiated from the Issue. If the PCO is \$25K or less, the CM PM is the initiator. If the proposal is over \$25K, the Change Order Unit (COU) Lead Estimator is the initiator.

- The initiator manually compiles the Change Order Package, see **Document Flow 2**
- CAMP copies the Issue CO amount to the Change Order Total Amount, see **Cost Flow 5**

### Initiated by a TCR



- The GC creates the TCR and initiates an Issue. CAMP links the Issue to the TCR.
- The CES integration creates an Estimate (EST) Shell in CES.
- The Bulletin cannot be finalized until the TCR integration returns the EST to the Issue, see **Cost Flow 1**, and CAMP copies the amount to the TCR Estimated Cost, see **Cost Flow 2**
- Once the TCR is approved,
  - CAMP copies the DocuSigned documents to the Issue References, see **Document Flow 1**
  - The CES Integration creates a PCO Estimate Shell in CES.
  - The CES integration returns PCO, FRE, and CO values to the Issue, see **Cost Flow 3**
- The Change Order is initiated from the Issue. If the PCO is \$25K or less, the CM PM is the initiator. If the proposal is over \$25K, the Change Order Unit (COU) Lead Estimator is the initiator.
  - The initiator manually compiles the Change Order Package, see **Document Flow 2**
  - CAMP copies the Issue CO amount to the Change Order Total Amount, see **Cost Flow 4**

### CES Shell Conditions

The following table provides the conditions to create CES shells.

Document	Conditions	CES Shell Created
<b>NOD from RFI</b>	Status = NOD Required Cost Effect = Yes NOD Status = Valid NOD Document Signed Status = True	PCO Estimate Shell
<b>BUL</b>	AEoR = SCA-AE	Bulletin Estimate Shell (In-House)
<b>BUL</b>	AEoR <> SCA-AE	Bulletin Estimate Shell (Design Consultant)
<b>CIC</b>	To be determined	Currently does not create shell
<b>TCR</b>	Cost <> 0 Time Change Days <> 0	PCO Estimate Shell

The CES integration returns values to the active Issue item. The active Issue item initiates a Change Order, then that Issue item is closed.

For example, an Issue item with no change type initiates a change order and is then closed. Another example includes a Unilateral Change Order (change type U) that is later resolved (change type R). In this case, the Issue item receives values from CES and initiates a Unilateral Change Order. The Issue item is closed, and a new Issue item is created for the change type R. The Issue Item with the change type R is now active and receives values from CES. Once complete, the Resolution Change Order can be initiated from the Issue item.

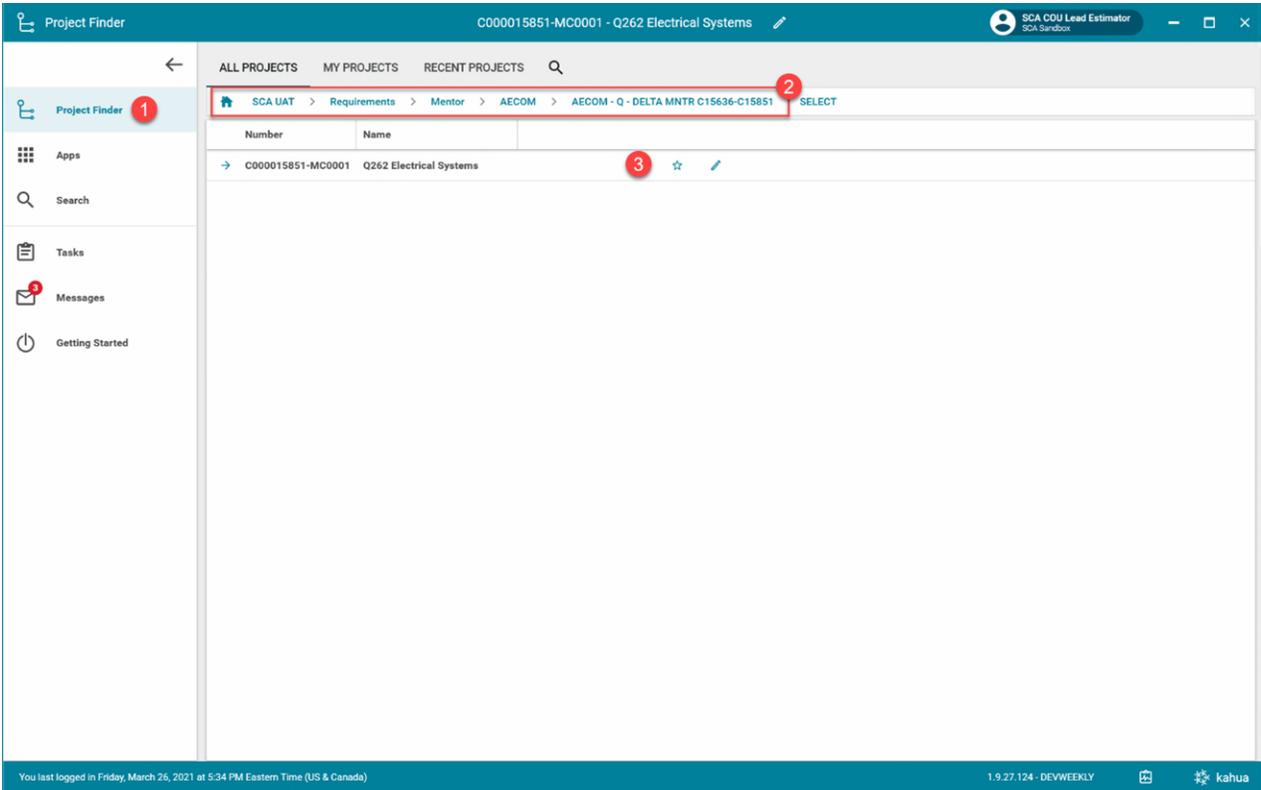
# Step-by-Step Instructions

## Enter Issue Item Details

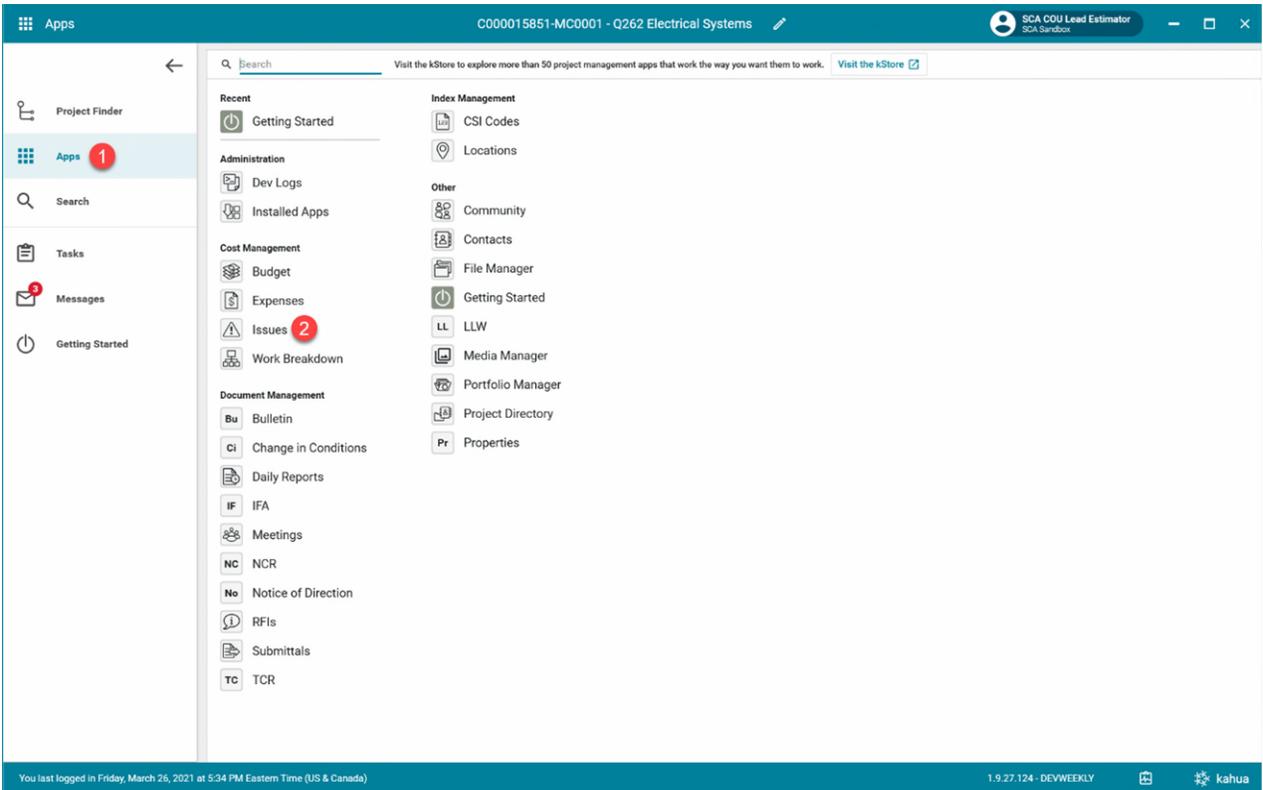
Role	Preceding Steps	Outcome
CM PM	Estimate, PCO, FRE and CO values are known in CES and need to be entered in CAMP.	Estimate, PCO, FRE and CO values are entered in CAMP.

### Steps

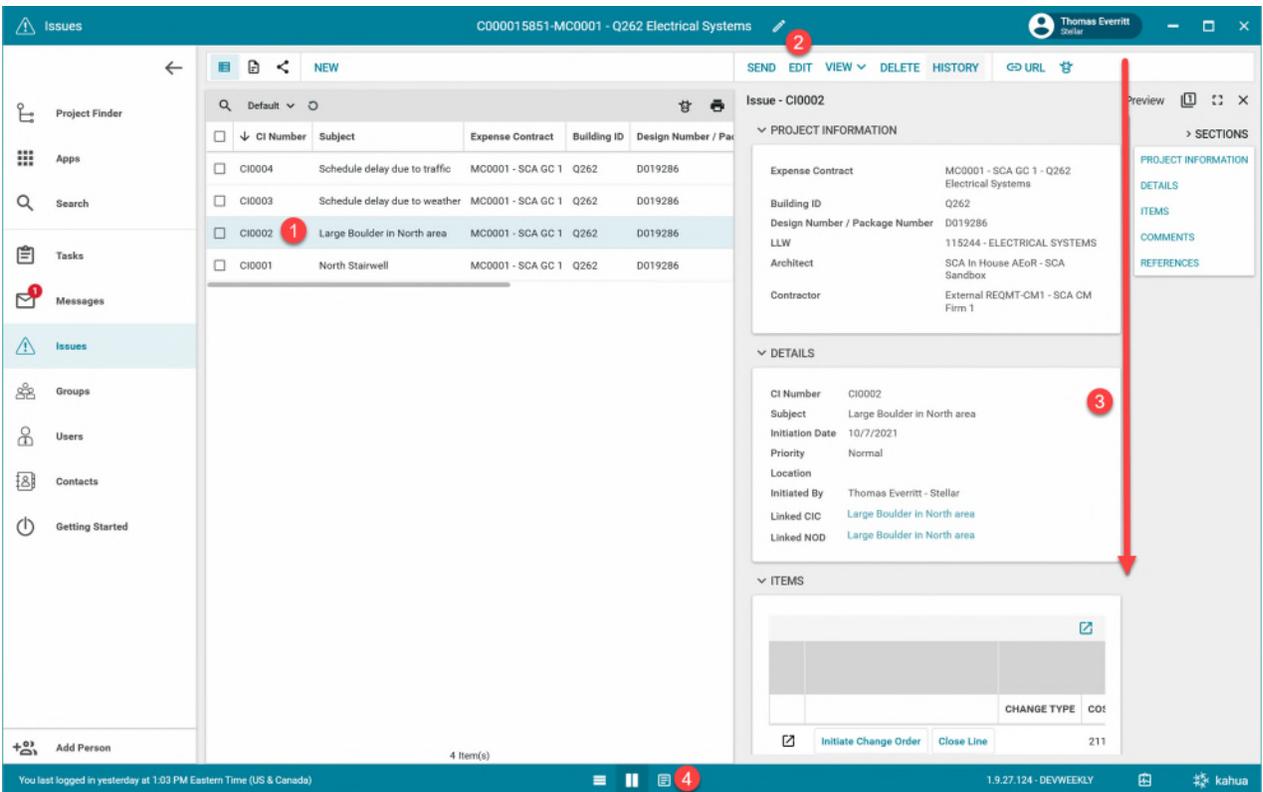
1. Select 'Project Finder' > Navigate to the desired Program > Select the desired Subproject



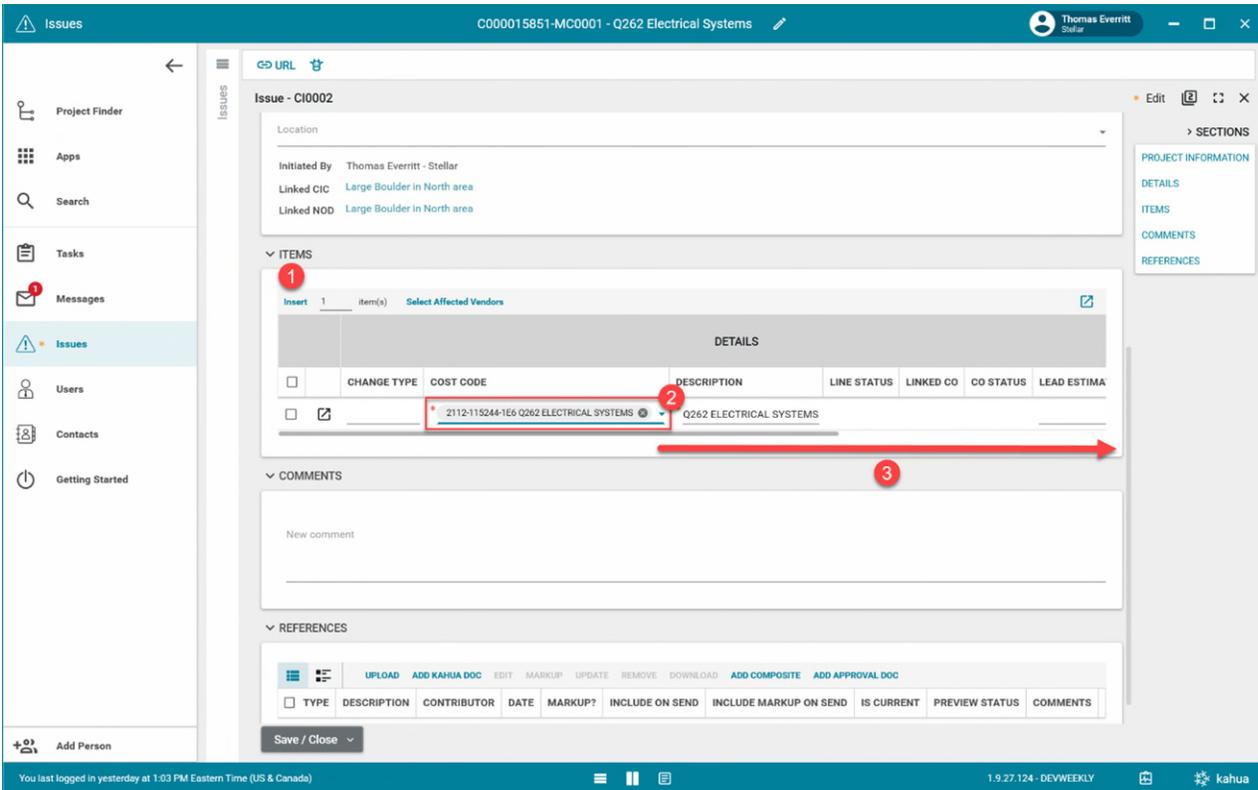
2. Select 'Apps' > Select the 'Issues' application



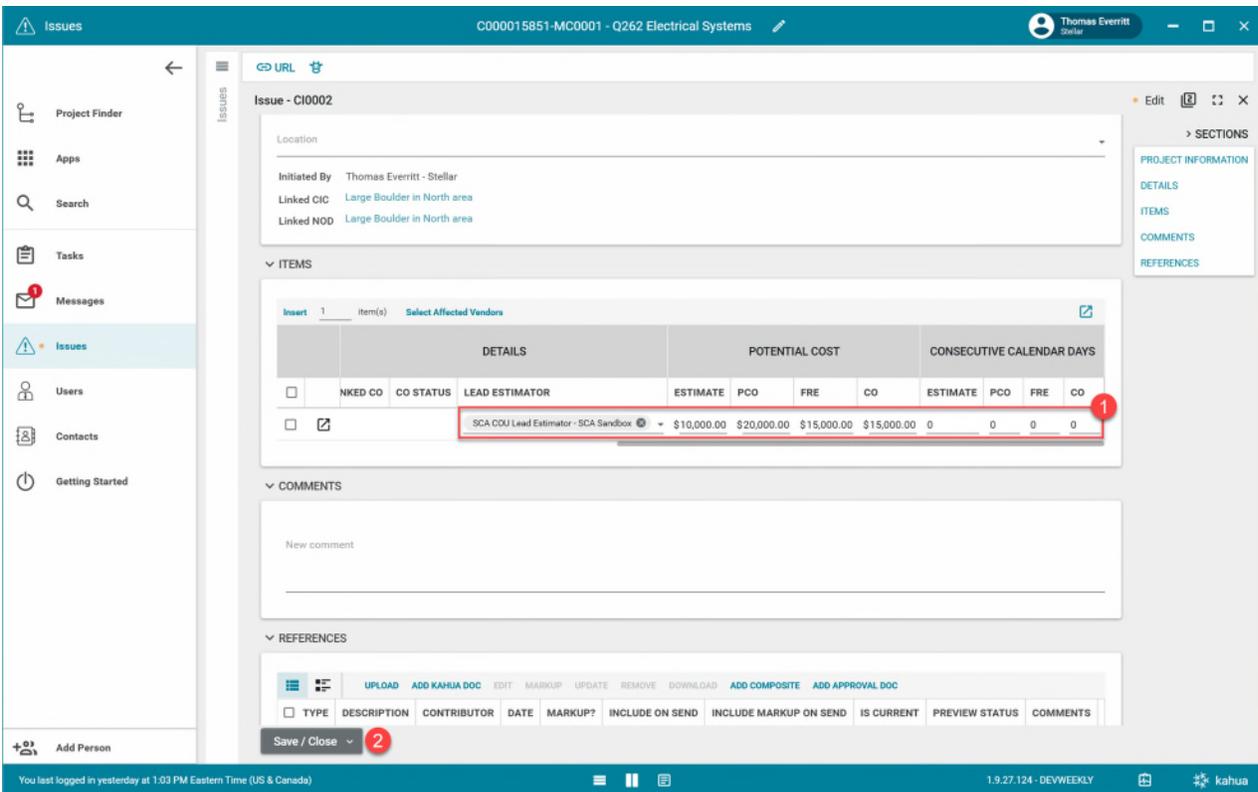
3. Select the desired record > Select 'Edit' > Scroll down to the 'ITEMS' section



4. Select 'Insert' > Select the 'Cost Code' > Scroll to the right to enter additional information



5. Enter the required field: **Description** and other fields > Click 'Save / Close'



# Initiate Change Order

Role	Preceding Steps	Outcome
CM PM, COU Lead Estimator	Estimate, PCO, FRE and CO values are entered in issues application and saved.	Change Order is initiated,

## Step

Select the 'Issues' application > Select the desired Issue > Scroll down to the 'ITEMS' section > Select 'Initiate Change Order' > Click Start Processing > **See the Change Orders Training Guide for Additional Steps**

