

Mentor Bulletin User Guide

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# About

The AEoR creates a Bulletin to provide design and engineering direction. A Bulletin may be created independently or when an RFI's Closure Status is Bulletin Required.

# Process Overview

While the Bulletin process is consistent for all project types, the terms CM Firm and CM PM are specific to Requirements projects. The CM Firm acts on behalf of the General Contractor and the CM PM is in the role of the Project Officer.

While a Bulletin may be created directly by the AEoR, a Bulletin is typically created when the Primary Responder completes an RFI with a decision that a Bulletin is required. Then, the AEoR processes the RFI to create a Bulletin.

When the draft Bulletin is complete, the AEoR sends the Bulletin to the CM PM, and the CM PM sends the Bulletin to the CM FIRM for review and acceptance. If the Bulletin is not accepted, the CM PM holds a meeting with all parties to discuss the Draft Bulletin. Once accepted, the draft is sent to the AEoR to be finalized with the completed estimate. Next, the Bulletin is reviewed by the A&E DPM and sent through an approval process based on dollar value.

- The A&E DM PIN signs all Bulletins. If less than or equal to \$25,000, the Bulletin is approved.
- The A&E Director PIN signs Bulletins greater than \$25,000. If less than or equal to \$100,000, the Bulletin is approved.
- The Director DCS PIN approves Bulletins greater than \$100,000.

CM PM approval:

- The CM PM processes the Bulletin to initiate a NOD (See Notice of Direction)
- DCS is notified and can update the DCS Reason Code as needed.

# Workflow Diagram



# Step-by-Step Instructions

## AEoR Creates a Bulletin from an RFI

1. Go to the **Project Finder** and click on the desired project.

ئل ا	Project Finder	T80019 - X181 TRAINING PROJECT #19 - SCHOOL RENOVATION
	$\leftarrow$	ALL PROJECTS MY PROJECTS RECENT PROJECTS Q
Ê:	Project Finder	* SCA Training > Hard Bid > Manhattan > District 5 SELECT
		Number Name
	Apps	→ T80025 TRAINING PROJECT #25 School Renovation
Ö	Calendar	→ T80019 X181 TRAINING PROJECT #19 - SCHOOL RENOVATION

## 2. Go to Apps> Click All Apps> Click RFI.

Apps	T80025 - TRAINING PROJECT #25 🧪		
÷	Recent	Q Search	
Project Finder	All Apps	All Apps	
Apps 2	Administration	IF IFA	
Calendar	Cost Management	Installed Apps	
_	Document Management	/i Issues	
Messages		NC NCR	
し Getting Started		Project Directory	
		RFIs	
		Submittals	
You last logged in today at 11:54 AM Easter	rn Time (US & Canada)		

3. Select the desired RFI.

đ	RFIs			TBC	0025 - TRAII	NING PROJECT #	125. /	Jordan External Co JE Construction	entractor A	- 0	×
	←		Construction	~	• •						
۴.	Project Finder	٩	Default 🗸	с							۵
-			CI Number	Subject	3	Workflow Status	Official Respo	onder	Date Due	Date Responded	f R
	Apps		C100002	unfores	creen	Draft	Adam SCA In	House AE AEoR - NYC SCA			
Ħ	Calendar		C100001	Test for	PO BootCAMP	Complete	Layla SCA PO	C - NYC SCA	9/21/2022	12/30/2022	2
_											
0											
ď	Messages										
Q	RFts										
Ċ	Getting Started										

### 4. Click Initiate Bulletin.



5. Click Start Processing.



The Bulletin app will open. Follow the steps listed below, starting with  $\underline{\text{Step 4}}$ .

## AEoR Creates a New Bulletin

1. Go to the **Project Finder** and click on the desired project.

ů	Project Finder				T80019 - X181 TRAINING PROJECT #19 - SCHOOL RENOVATION	ľ	
		$\leftarrow$	AL	PROJECTS	MY PROJECTS RECENT PROJECTS Q		
Ŀ	Project Finder	1	ħ	SCA Trainin	g > Hard Bid > Manhattan > District 5 SELECT		
				Number	Name		
	Apps		÷	T80025	TRAINING PROJECT #25 School Renovation	*	ľ
Ö	Calendar		÷	T80019	X181 TRAINING PROJECT #19 - SCHOOL RENOVATION	*	ľ

2. Go to Apps> Click All Apps> Click Bulletin

₩	Apps		T80025 - TRAINING PROJECT #25 School Renovation							
			$\leftarrow$	Recent	Q Search					
٥Ľ	Project	Finder		All Apps	All Apps					
	Apps	2		Administration	■ Budget >					
1	O dan da			Cost Management	Bu Bulletin					

3. Click New.



### **Bulletin Details**

- 4. Enter the following information:
  - LLW: If your project has more than one LLW, select the correct one from the dropdown menu.
  - **Priority** (Optional): Select from the dropdown menu.
  - Subject (Required): Type your Bulletin subject.
  - **Description** (Optional): Type your Bulletin subject.
  - Location (Optional): Select from the dropdown menu.

M835 - 25008 - TRAININ	ONLY ·				
Building ID	M835				
Design Number / Packa	Number				
LLW	25008 - TRAINING ONLY				
Architect	Adam SCA In House AE AEoR - NYC SCA	Adam SCA In House AE AEoR - NYC SCA			
Contractor	Mia External Contractor Y - YY Construction				
Priority Normal					
Subject					
Field is required.					
Bulletin Description					

- 5. Contract Documents section (Optional). As a best practice, you should provide details for all parties to view.
- 6. Cost section (Required):
  - Cost Effect
  - Reason Code
  - AEoR Reason Justification

CONTRACT DOCUMENTS 5	
Drawing Number	
Detail Number	 
Spec Section	
cost 6	
First is regard. Estimated Cost	
Reason Code	
AEoR Reason Justification	
Field is required.	

- 7. References section: Click Upload to attach all necessary backup documentation.
- 8. Click **OK.**

	Add Files	
	Completed	
	Backup Documentation.pdf	
✓ REFERENCES		
UPLOAD ADD KAHUA D	Comments:	DN SEND IS CURREN
	Cancel Ok	

9. Click Save/Close.

-	UPLOAL	ADD KAHUA DOC EDIT MARKUI	P UPDATE REMOVE DOWNLOA	D ADD COMPOSITE	
	TYPE	DESCRIPTION	CONTRIBUTOR	DATE	SIZE MARKU
Su	pporting Document				
	Supporting Docur	nent 🗅 Backup Documentation	ndf Adam SCA In House AF AF	FoR 12/30/2022 9:56	AM No

10. Click Initiate Issue.

**NOTE**: The bulletin may have been initiated from an RFI with a Closure Status of **Bulletin Required**. In this case, an Issue is already created.

REFE	RENCES					
=	MARKUP	DOWNLOAD				
	ТҮРЕ	DESCRIPTION	CONTRIBUTOR	DATE	SIZE	MARKUP?
∨ Suj	pporting Document Supporting Documer	nt 🗋 Backup Documenta	tion.pdf			
_						
nitiate	e Issue					

#### 11. Click Start Processing

Pr	ocess				×
22	Select target partitic	n and document type:			LY
	-	in and document type.			_
	Source	No. 1 – Roofing			_
	Target Application				
	Select copies to incl	ude in references:			
	PDF of Initiation	ng document (current state) on the D	estination document		
	PDE of Destina	ation document (current state) on the	Initiating document		
		anon document (carrent state) on the	and any accurrent		_
	Select references to	include:			
	Туре	Description		Reference Type	
					_
					_
			_		_
				Cancel Start Process	ing
_					_

#### Issues App

After you start processing the Bulletin, the Issues app opens to create a change issue (CI), which provides a global CI number for all activity related to this Bulletin. For instance, if the Bulletin results in an NOD or Change Order, those records will all be linked to the issue.

### 12. Click Save/Close



13. Click Linked Bulletin to return to Bulletin.

<b>999</b>	Messages	~ [	DETAILS	
Bu	Bulletin	5	CI Number Subject	C100003 No. 1 – Roofing
	lagues	c	CI Status	
<u> </u>	issues	1	nitiation Date	12/30/2022
		F	Priority	Normal
Ċ	Getting Started	L	Location	AUDITORIUM
		1	nitiated By	Adam SCA In House AE AEoR - NYC SCA
		L L	Linked Bulletin	No. 1 – Roofing 13

You can modify the Bulletin *before* it has been submitted OR if it has been recalled or retuned to you.

1. Click Edit.

				÷	T80025 - TR	AINING PROJECT #25 S	School Renova	ation	1	0-	Adam SCA In House AE AEoR		-	8	×
• C	•	<	NEW	1				1	EDIT VIEW	HISTORY	GÐ URL				
Q D	efault	t 🗸	с								F	review		0	×
CI Numbe	er	Date		Priority	Subject	Expense Contract	Building I	∽ PR	OJECT INFORM	MATION			> S	ECTI	ONS

2. Make any other changes as needed and click Save/Close.

#### Submit Bulletin

Navigate to the desired Bulletin if you are not already in the bulletin.

14. Click Submit.



**IMCM PMRTANT: DO NOT DELETE.** If you need to change any information *after* submission, please reach out to Helpdesk@nycsca.org

## CM PM Sends Bulletin to CM Firm

- 1. Open Tasks.
- 2. Select the desired task and review each section.
- 3. Review the details and click Send to CM FIRM.

Ê	Tasks	M0	88 Library modification I.S. 88	Layla SCA PO NVC SCA	° – Ø ×
	$\leftarrow$	≅ List Active ✔ SHAN	RE	HISTORY	
o_li ₩	Project Finder	Q	SUBJECT	Bulletin Cl00003 View Source Record >	Task 🗓 🗙
Ё	Calendar	Adam SCA In House AE AEoR	Bulletin Cl00003 CMPM/PO Approval T RFI Cl00001 - Test for PO BootCAMP or 2 Item(e)	Expense Contract	> SECTIONS PROJECT INFORMATI DETAILS
٩	Search		z ienile)	Building ID Design Number / Package Num	CONTRACT DOCUME
0	Tasks			LLW Architect	DATES & WORKFLOW
Ľ	Messages			Contractor	DM CONCURRENCE AE DIRECTOR CONCU
U	Getting Started			✓ DETAILS     CI Number Cl00003     Date 12/30/20     Priority 3 mal     Save Send to GC F	DCS REASON CODE R DIRECTOR DCS CONC COMMENTS CANCEL REASON

## CM Firm Accepts or Returns the Bulletin

The CM Firm reviews the draft bulletin and the AEoR finalizes the bulletin OR the CM Firm returns the draft Bulletin and the CM PM must coordinate a meeting to rectify any issues. Those steps take place outside of the CAMP platform.

#### CM Firm Accepts the Bulletin

- 1. Open Tasks
- 2. Select the desired task.
- 3. Review details of record and click Accept.

Ê	Tasks	TRAINING PROJECT #25 School Renova.	🖍 😮 Mia External Contractor Y 🗕 🗗 🗙
	$\leftarrow$	≅ List ← SHARE	HISTORY
ئە	Project Finder Apps	Q         \vec{2}         View: Default ~         Image: Comparison of the comparison of	Bulletin Cl00003 Task I × View Source Record >
⊟ <	Calendar Search	1 ltem(s)	Expense Contract PROJECT INFORMATION DETAILS Building ID CONTRACT DOCUMEN_
<b>1</b>	Tasks	]	Design Number / Package Num COMMENTS LLW CANCEL REASON Architect REFERENCES Contractor MEDIA
ڻ ا	Getting Started		✓ DETAILS
			Ci Number Ci0003 Date 12/30/20 Priotity 3 ormal Save Accept Return

- 1. To Return, Click Tasks.
- 2. **Select** the desired task.
- 3. Click Return.
- 4. Enter Return Reason.
- 5. Click **Continue.**

Ê	Tasks		TRAINING PROJECT #25 School Renova 💉 😫 Mia External Contractor	) – æ ×
		←	E List Active V SHARE HISTORY	
٥Li	Project Finder		Q = View: Default ~ Bulletin Cl00003	Task 🗓 🗙
	Apps		FROM SUBJECT View Source Record >	
		2	1 Item(s)	> SECTIONS
	Calendar		Return Reason	×
Q	Search		4	AEN
<b>£</b> 1	Tasks		Reason Field is required.	
•	Messages		5 Continue	Cancel
	Getting Started		~ DETAILS	
			Ci Number Ci00003	
			Date 12/30/2022 Priority Normal	
			Save Accept Return	

CM PM Holds Meeting and Forwards Bulletin to AEoR

- 1. Open **Tasks** > Select the desired task.
- 2. Navigate to the **References** section> Click **Upload** and attach the **Sign-In Sheet** and **Meeting Notes.**
- 3. Click Meeting Completed.



## AEoR Finalizes the Bulletin Draft

**Required**: You **must** enter the Estimated Cost. Make any other changes to the Bulletin before Finalizing the Bulletin.

- 1. Open Tasks> Select the desired task.
- 2. Click Edit.



- 3. Click Enter Estimated Cost.
- 4. Enter the cost effect amount, if applicable and click Continue.



5. Click Finalize.



6. A CM PM popup window will remind you to attach the Bulletin Estimate Document in the References section of the linked Issue, which you can do at any time. Click **OK**.



### Upload the Bulletin Estimate Document

1. With the Bulletin open, go to the Details section and click the Linked Issue.

Bu	Bulletin						X181 TRAINING	PROJECT	74 - SCHOOL RENOV	ATION 🖋	Nicolas EXT-AE AE	<sup>081</sup> – 6 <sup>9</sup> ×
0		←	Q Defi	< NEV	v					SEND EDIT VIEW HISTORY Bulletin Cl00012	GƏ URL	Preview 🕕 🗅 🗙
E	Project Finder		CI Number	Date	Priority	Subject	Expense Contract	Building ID	Design Number / Pack	PROJECT INFORMATION		> SECTIONS
ш	Apps		CI00012	3/1/2023	Normal	Face brick replacement	T80004 - JJ Construction	X181		Excesses Posteart	T00005. 11 Posstaution, V101 Training Designt #4, School	PROJECT INFORMATION
Q	Search		C100008	11/30/2022	Normal	Boulder found at ramp site	T80004 - JJ Construction	X181		Building ID	Renovation	DETAILS
e P	Tasks		C100007	11/10/2022	Normal	Humicane damage to school building	T80004 - JJ Construction	X181		Design Number / Package Numbe LLW Architect Contractor	40008 - TRAINING ONLY Nicolas EXT-AE AEOR-1 - NYC SCA Luke External Contractor D - JJ Construction	CONTRACT DOCUMEN., COST DATES & WORKFLOW DPM CONCURRENCE
Bu	Bulletin									✓ DETAILS		DM CONCURRENCE AE DIRECTOR CONCUR.
Ģ	Getting Started									CI Number CI00012 Date 3/1/2023 Priority Normal Subject Face brick n Bulletin Description Need Retar Location CAFETEINA Linked RFI Face brick n Linked RFI Face brick n	splacement galacement	DISSIGNMENTE DIRECTOR DOS CONCUL COMMENTE CANCEL REASON REFERENCES MEDIA
										CONTRACT DOCUMENTS      Drawing Number D2/Section 5      Detail Number 2      Spec Section 5      COST		
						3 literr(s)				Cost Effect Yes Estimated Cost \$4,50 Reason Code E-ERI Concel	10.00 DR Design Error	
You la	at logged in today at 11	141 AM East	tern Time (US & I	Canada)							1.9.34.83-DEMO	🖽 🗱 kahua

2. The Change Issue associated with the original RFI and new Bulletin will open in the Issues App. Click Edit.

<u> </u>	ssues		X181 TRAINING PROJECT #4 - S	CHOOL RENOVATION 🖌 👰 .	licolas EXT-AE AEOR-1
	←	Issues			
0		E P NEW		SEND EDIT TORY COURL	
E	Project Finder	Q Default V C	÷	Issue - Cl00012	F
	Apps	□ ↓ CI Number Subject	Expense Contract Building ID Design Number /	Location Initiated By Luke External Contractor DLI Construction	
0	Canada	CI00012 Face brick replacement	T80004 - JJ Construction X181	Linked RFI Face brick replacement	
~	Search	CI00011 Things not working out	T80004 - JJ Construction X181	Linked Bulletin Face brick replacement	
P	Tasks	CI00010 ACM Table	T80004 - JJ Construction X181	✓ ITEMS	
_70		CI00009 Drawing not clear	T80004 - JJ Construction X181		
	Messages	CI00008 Boulder found at ramp site	T80004 - JJ Construction X181		
Bu	Bulletin	CI00007 Hurricane damage to school building	T80004 - JJ Construction X181		DETA
	Issues	CI00006 Leaky Roof at the cafeteria	T80004 - JJ Construction X181	Z Initiate Change Order Close Line	Active
		CI00005 Clarification needed for drawing A10	T80004 - JJ Construction X181		0.000
ሳ	Getting Started	CI00004 Delaminated Steel	T80004 - JJ Construction X181	Y COMMENTS	

- 3. In the **References** section, click **Upload** to attach your Cost Estimate.
- 4. Click Save/Close.

TYPE	DESCRIPTION	CONTRIBUTOR	DATE	SIZE
Supporting Docu	ment			
Supporting I	Document D Backup Documentatio	on odf Nicolas EXT-AE AEO	R-1 3/1/2023 1:54 P	M OKB
		ALL ALL ALL	3, 1, 2020 1.041	0100
TEGRATION				
TEGRATION				

## DPM Reviews and Approves the Bulletin

- 1. Open **Tasks** > Select the desired task.
- 2. Navigate to the **DPM Concurrence** section
- 3. Enter your **comments**.
- 4. Click Approve or Decline.

Note: If you Decline, you must first enter your comments under the Concurrence section for your role.

Ê	Tasks	X096 TRAINING PROJE	CT #1- School Renovati 🧪 🆓 Brittney SCA AE DF	°M — ⊡ ×
	÷	≅ List <b>∨</b> SHARE	HISTORY	
Ŀ	Project Finder	Q = View: Default *	Bulletin Cl00021	Task 🗓 🗙
		FROM SUBJECT	View Source Record >	
	Apps	Adam SCA In House AE AEoR Bulletin CI00	021 : Assigned Date 11/30/2022 Status Draft	> SECTIONS
茵	Calendar	Adam SCA In House AE AEoR Bulletin CI00	012 A Submission Date 11/21/2022	PROJECT INFORMATI
Q	Search	Adam SCA In House AE AEoR Bulletin CI00	D08 A         Finalize Date         11/30/2022	CONTRACT DOCUME
~		Adam SCA In House AE AEoR Bulletin CI00	DO3 A DPM Reviewer	COST
1	Tasks	Adam SCA In House AE AEoR Bulletin CIOC	DO7 A DM Approver	DATES & WORKFLOW
		5 Item(s)	DM Approval Date	2 DPM CONCURRENCE
	Messages		SCA Approver SCA Approval Date	DM CONCURRENCE
			· · · · · · · · · · · · · · · · · · ·	AE DIRECTOR CONCU
Ū	Getting Started		V DPM CONCURRENCE	DCS REASON CODE R
			3	DIRECTOR DCS CONC
			DPM Bulletin Comments	COMMENTS
				CANCEL REASON
			Save Approve Decline	

## DM > AE Director> DCS Director Approve Bulletin

Once the AE submits the Bulletin for approval it moves through the <u>approval process</u> sequentially based on dollar value:

- SCA DM reviews all Bulletins and approves when less than or equal to \$25K
- AE Director PIN signs the Bulletin when greater than \$25K up to \$100K.
- DCS Director approves Bulletins greater than \$100K

Once the Bulletin is approved by all parties, the CM PM can initiate the NOD. See the <u>CAMP Mentor NOD User Guide</u> for further instructions.