



UNIVERSITY OF ILLINOIS SYSTEM

## RFI Training Document

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# Table of Contents

<b>Overview</b>	<b>3</b>
<b>RFI Workflow Design</b>	<b>4</b>
<b>Create and Send an RFI</b>	<b>5</b>
<b>Respond to an RFI</b>	<b>7</b>
<b>Complete an RFI</b>	<b>8</b>
Conditional Workflow of an RFI	8
Manual Process of RFI to Issue by PSC	9
<b>Resources</b>	<b>11</b>



## **Overview**

The RFI application allows the Author to initiate a Request for Information (RFI), route it through the Primary Responder and optional Secondary Responders for review.

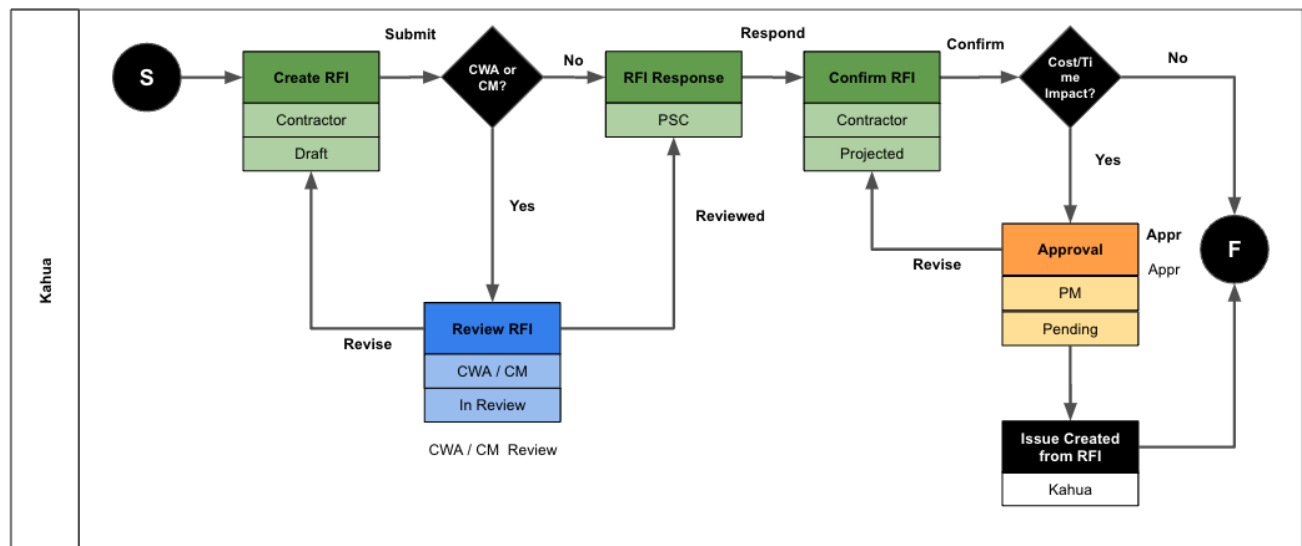
The app maintains a log of all RFIs in the project and has a built-in workflow to manage through completion. The RFI application may be shared with external parties to collaborate, review and respond accordingly.

In addition to the workflow below, with the proper configuration the Owner or Owner Representative may also be included in the workflow.

Once Complete, an RFI can be Processed into an Issue in order to collect pricing for time and cost impacts based on the RFI response.



# RFI Workflow Design



## Workflow Participants

1. Author/Contractor – the person initiating the RFI
2. Primary Responder – the person named by the Author as the person responsible for the final response to the RFI. Typically, the PSC on the Project.
3. Reviewers – the CWA/CM assigned in the Project Details
4. Secondary Responder – a person included in the process by the Author, Primary Responder or another Secondary Responder. Secondary Responders reply to the Primary Responder, not to the Author. Usually an Engineer or other Consultant.
5. Project Manager – the final approver of the RFI



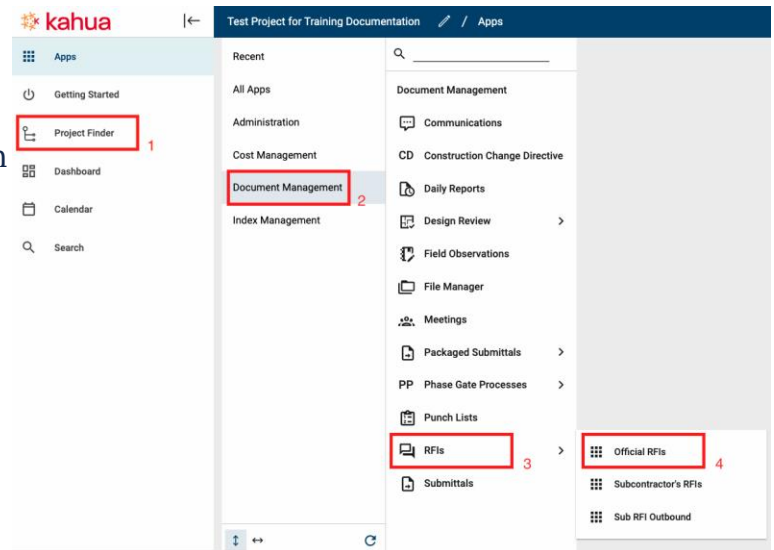
## Create and Send an RFI

1. As the Author of the RFI, please navigate to the appropriate project using the Project Finder located in the left side menu (Image 1)

2. Access the RFIs app from the App Launcher under the Document Management section by clicking on Official RFIs

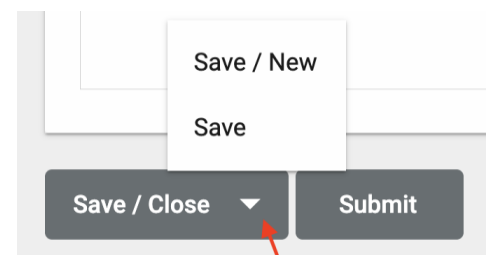
3. Once in the RFI application, click New located at the top to create a new RFI

4. Fill out the RFI form noting the following:



- a. Required fields are marked with red text
  - b. The PSC should be selected as the Primary Responder
  - c. Provide any other information that will be helpful for the PSC to provide a complete and detailed response.
5. Attach reference documents at the bottom of the form, if applicable
  6. Use the options on the Save menu at any time during editing by choosing:

- a. Save - saves the RFI that you are editing while allowing you to continue editing
- b. Save/New - saves and closes the RFI you are editing and opens a new RFI form
- c. Save/Close - saves the RFI you are editing and closes the RFI Edit window



7. After you have finished editing the RFI, click the Submit button
  - a. This saves the RFI and sends the RFI into workflow
  - b. The Status will increment to “In Review”.




8. At this point the Author can only Recall the RFI to make edits or if it needs to be deleted
9. The RFI is first sent to the person assigned to the CWA/CM role in the Project Details for Review
  - a. The CWA/CM receives a Kahua task and an email message about the RFI
  - b. The RFI can be sent back for Revision by the CWA/CM or the Review can be marked as completed
  - c. If there is not a CWA or CM on the project, the RFI will be sent directly to the PSC
10. Once the RFI has been Reviewed by the CWA or CM, who is the PSC, which results in a new message and task in Kahua
  - a. The Primary Responder also receives an email message about the RFI




## Respond to an RFI

The Primary Responder (PSC) can solicit responses from secondary responders and add the secondary response to the Primary (official) Response as required



1. As the Primary Responder, access the RFI task notification from:
  - a. Click the link in the email and auto-navigate to Kahua
  - b. Sign into Kahua and click on your task icon located at the top right then select the RFI task
2. To solicit additional responses, click Insert in the Secondary Responders grid
3. Click Send to Secondary Responders
  - a. Secondary Responders receive a task and message alert
  - b. Secondary Responders enter a response in the Response field and click Respond
  - c. The Date Responded will auto populate when the Secondary Responder responds
4. As the Primary Responder, click the More Detail  icon to the left of the Secondary Responder in the grid to see their response
5. To add secondary responses to the Primary response, select Add to Response checkbox. Click Add Responses to primary response
6. Edit primary response as required.
7. As the Primary Responder click Respond
  - a. A task is sent to the Author to either complete or request clarification

SECONDARY RESPONSES			
Insert	1	Item(s)	
<input type="checkbox"/>		Secondary Responders	Date Sent Date Due Date I
<input type="checkbox"/>		* Dallas Hall - Hall's Hardhats	

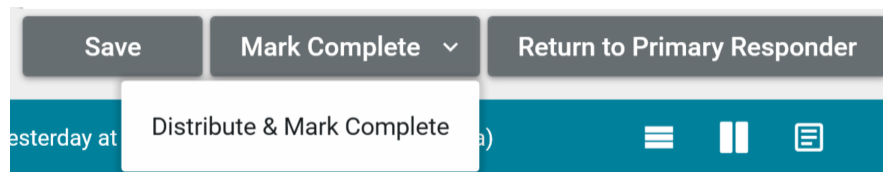
Save Return for Clarification Send to Secondary Responders

Note: The responses from the secondary responders will not show in the RFI log unless they are selected to be added to the Primary Response.



## **Complete an RFI**

1. As the Author, open the RFI app and note that the log reflects:
  - a. The Status is “Responded”
  - b. The Assigned To column indicated the RFI is outstanding with the Author
2. If the RFI response is sufficient, click one of the options to close and lock the RFI:
  - a. Mark Complete saves and locks the RFI
  - b. Distribute & Mark Complete saves and locks the RFI and sends a notification to all contacts in the Response Distribution list.
3. If the RFI response is insufficient, click Return to Primary Responder to request clarification.



## ***Conditional Workflow of an RFI***

1. Once the Author marks the RFI as complete, the conditional workflow will check if either:
  - a. The Potential Cost Impact is marked as “Yes OR Unknown”
  - b. The Potential Time Impact is marked as “Yes OR Unknown”
2. If either of these fields are marked as “Yes OR Unknown” the workflow will send the RFI to the Project Manager who is assigned in the Project Details
3. The Project Manager will then Review the RFI and either:
  - a. Approve the Potential Cost AND/OR Potential Time impact
  - b. Reject the Potential Cost AND/OR Potential Time impact





- i. This will send it back to the Author to change the value in those fields to remove the requested cost/time impacts
  - ii. The Author can then Submit again and as there is no Cost or Time Impact the RFI will be marked as Complete which will close the RFI
4. If the RFI with the Cost/Time impact is approved by the **Project Manager**, then the project manager will need to notify the PSC so that the Issue can be created
5. To Notify the PSC please navigate to the Approved RFI in the specific Project
6. Select the Approved RFI  
and click on the Send Button
7. Please add the PSC in the To and let them know that this RFI can be processed to an Issue and hit Send

SEND	EDIT	PROCESS	VIEW	DELETE	HISTORY	Merge
------	------	---------	------	--------	---------	-------

### ***Manual Process of RFI to Issue by PSC***

1. When the Project Manager notifies the PSC on an Approved RFI with Cost/Time impact, the PSC will receive an email and a message in Kahua
2. Using the link in the email please navigate to the RFI application in the specific Project in Kahua

SEND	EDIT	PROCESS	VIEW	DELETE	HISTORY	Merge
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3. Click on the RFI record that was Approved by the Project Manager and click on the Process button located at the top of the record
4. Ensure the Target Application is set to Issues and click on Start Processing
5. This will navigate you, the PSC, to the Issue Application where the RFI will be converted to an Issue in Draft State
6. Please go ahead and fill out the Issue/RFP as per the Issue/RFP training guide

Select target partition and document type:

Source RFI 0001

Target Application  
Issues

Select copies to include in references:

☒ PDF of Initiating document (current state) on the Destination document

☒ PDF of Destination document (current state) on the Initiating document

Select references to include:

Type	Description	Reference Type

Cancel

Start Processing