Section 7

Request for Information (RFI)

Oracle Primavera

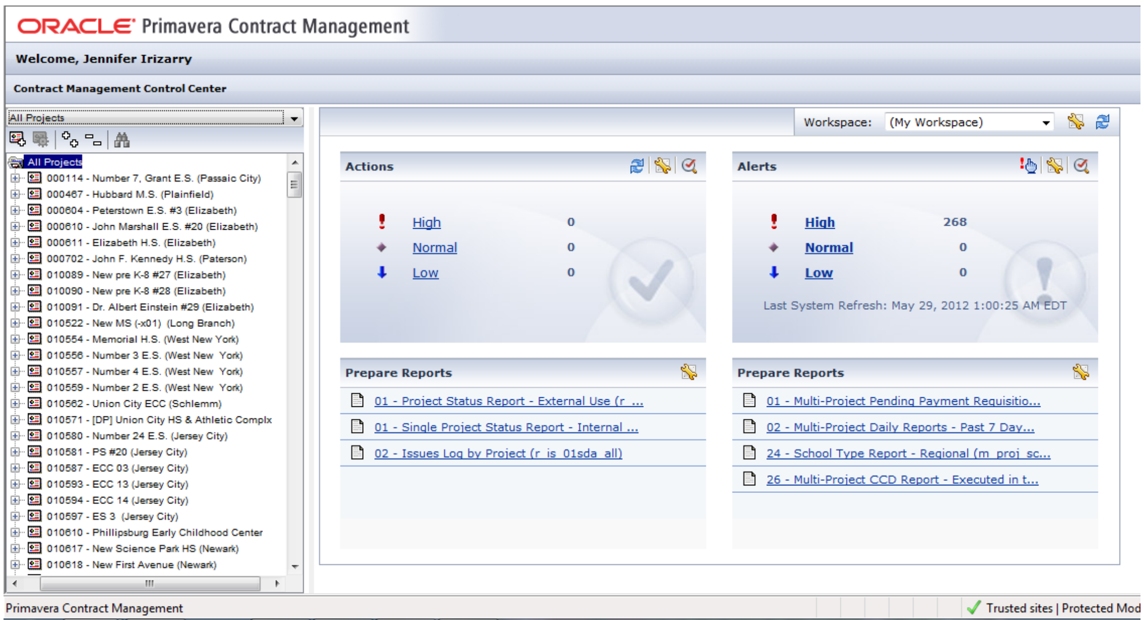
Table of Contents

I. Create a Request for Information (RFI)

A **Request for Information** is a question submitted to the PMF/CM from the General Contractor (GC). The RFI will detail the nature and reason for a proposed change.

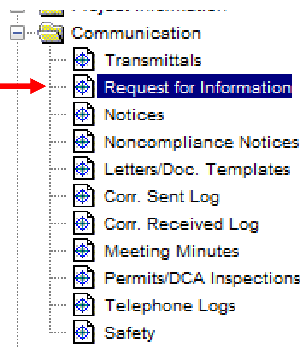
To access the **Request for Information (RFI)** folder from the Contract Management Control Screen:

1. Once logged into Contract Management, the **Contract Management Control Center** screen displays (as shown).

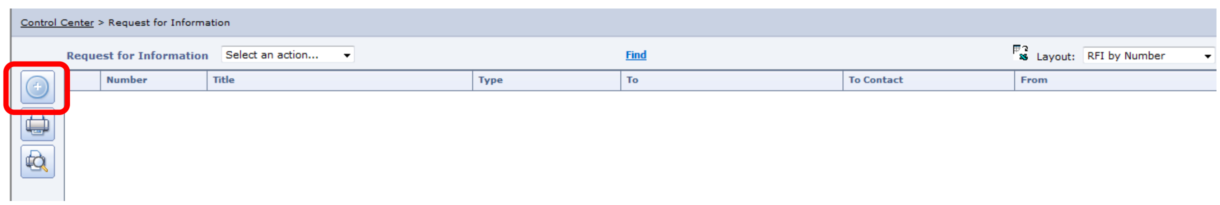


2. Select your desired project.

3. Open the **Communication** folder (a list of subfolders displays) and click the Request for Information module.

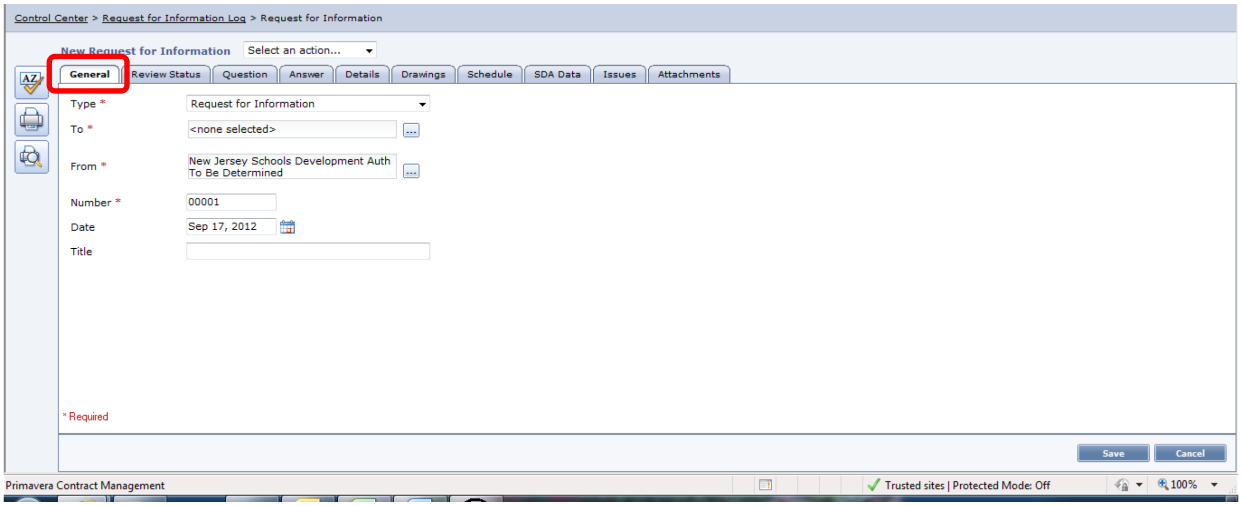


4. The RFI log view displays. Click the **Add Document** button.



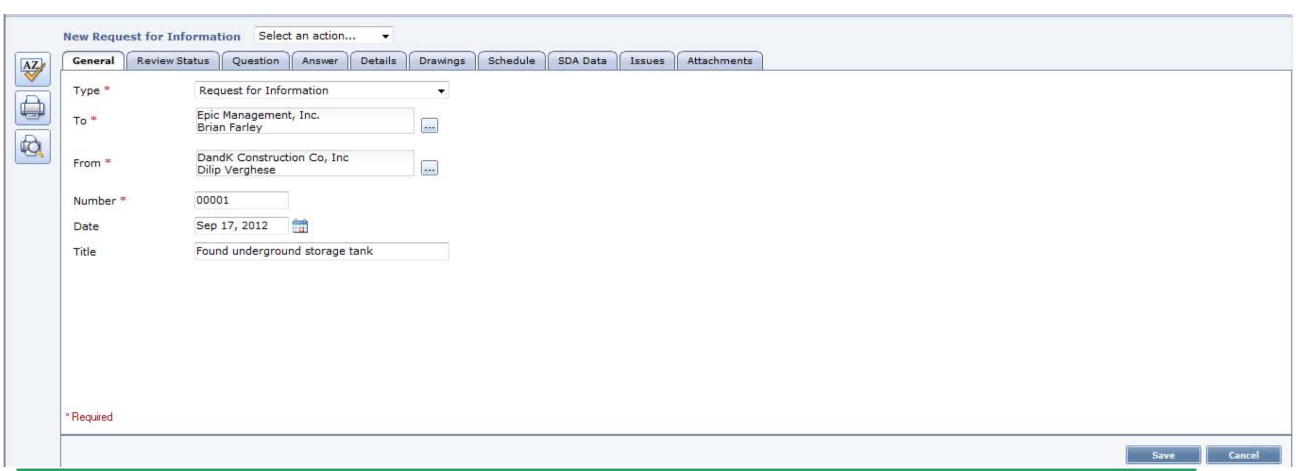
5. A blank RFI displays. The document is divided into several sections:

A. General Tab

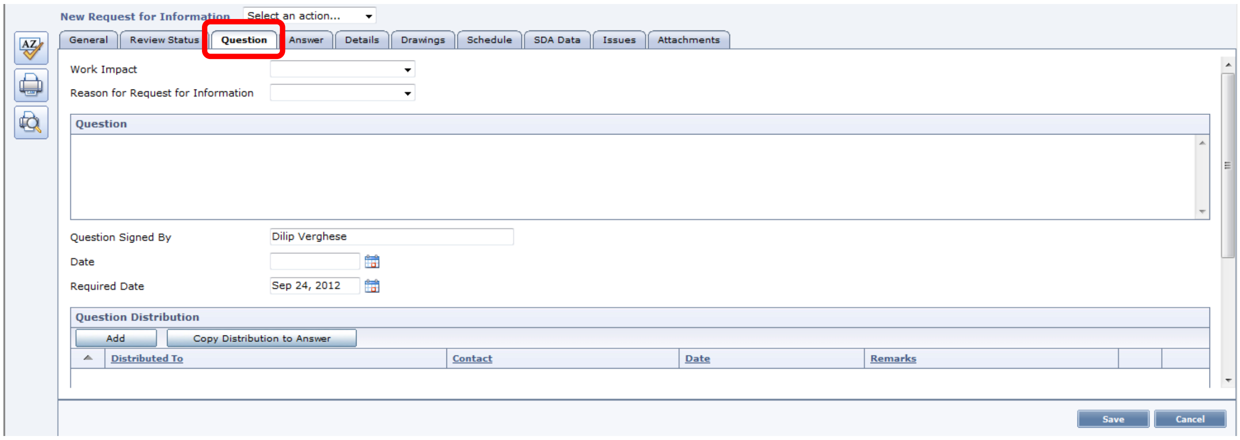


- **Type** – Defaults to **Request for Information**. Do not change this default value. This is a required field.
- **To –** Click the **select** button next to the field to choose the recipient from the contact list. This is a required field. **IMPORTANT:** This is the <u>only opportunity</u> you will have to select the To company. Once you save the document, you will not be able to edit the company, only the contact names.
- **From -** Click the **select** button next to the field to choose the sender from the contact list. This is a required field. **IMPORTANT:** This is the <u>only opportunity</u> you will have to select the To/From company. Once you save the document, you will not be able to edit the company, only the contact names.
- **Number** – Contract Management will automatically sequentially number the document. Do not change this number. This is a required field.
- **Date** – Defaults to the current date, but can be changed by clicking the **calendar icon** to choose a new date.
- **Title** – Enter a brief description (35 character field).

An example of a completed section is shown:

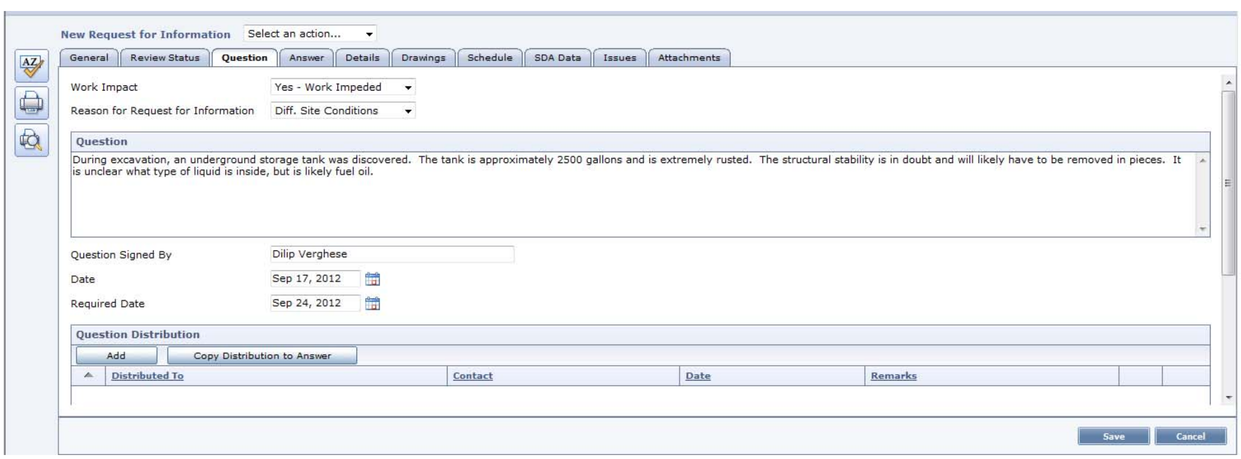


B. Question Tab

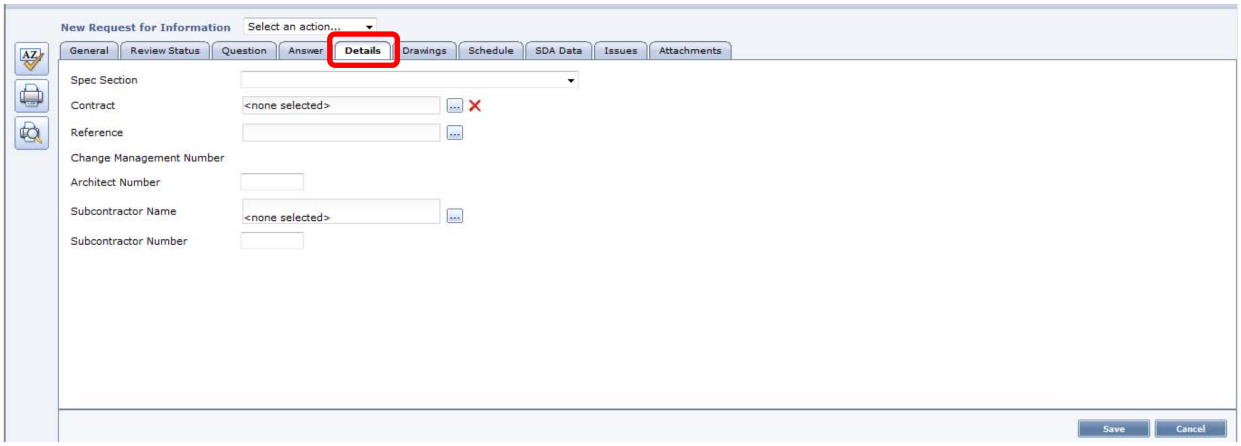


- **Work Impact** – click the drop down list to indicate whether there is a work impact to the RFI.
- **Reason for Request for Information** – click the drop down list to indicate the reason for this document.
- **Question** – enter the description of the question (4000 character field)
- **Question Signed By** – defaults to the name in the From field, but can be manually edited as necessary (there is no select button for this field)
- **Date** – click the calendar icon to indicate the date the question was entered
- **Required Date** – date defaults to 7 calendar days later than the creation date. Click the calendar icon to change the date.
- **Question Distribution** – click the **Add** button to select the names of others who should be informed of this RFI.
- **Proposed Solution** – if applicable, enter the proposed corrective action for the RFI (4000 character field)

An example of a completed section is shown:

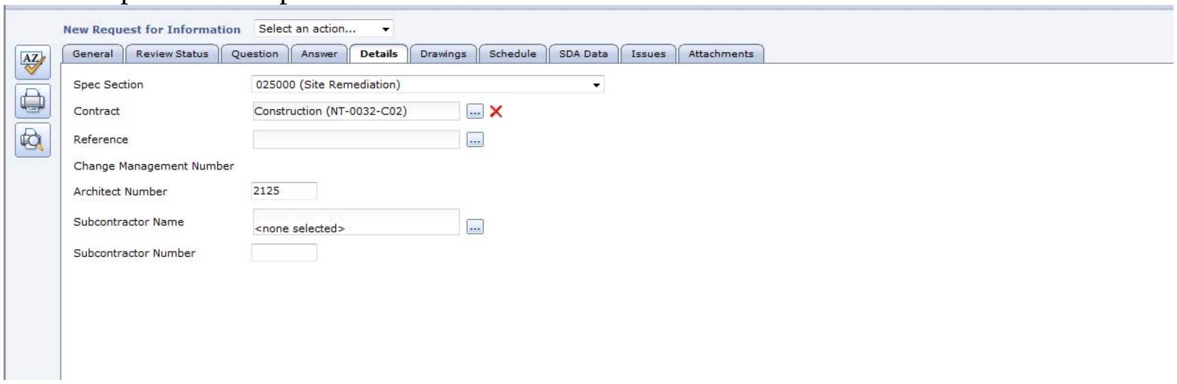


C. Details Tab

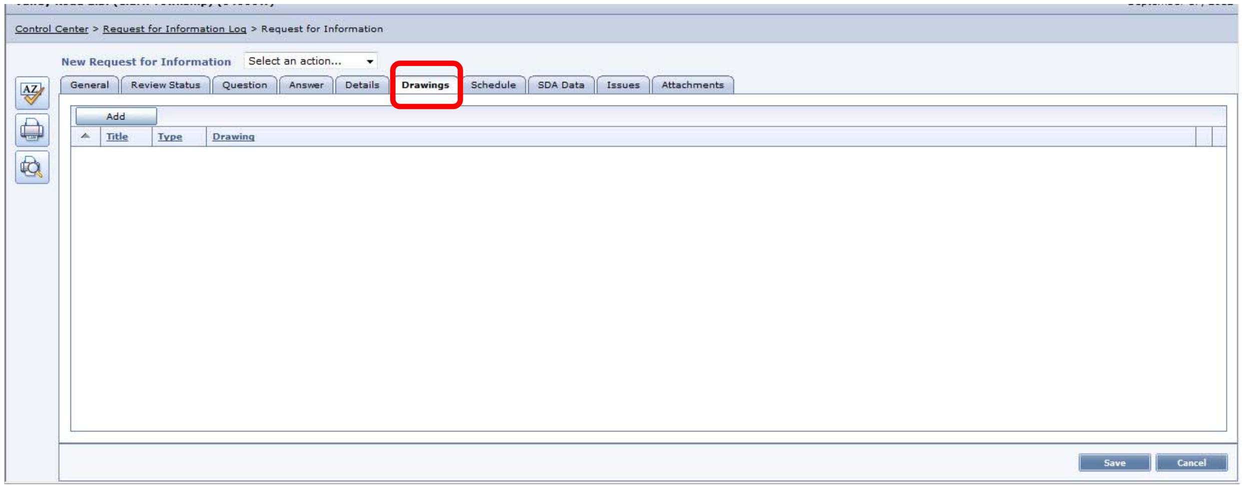


- **Spec Section –** if applicable, click the drop down list link a Construction Specification Index (CSI) section to this RFI. Note: there is information available from 1994 and 2004 in this list. Each section is clearly marked.
- **Contract** – click the **select** button next to the field to select the applicable contract
- **Reference** – if applicable, click the **select** button next to the field to choose the title of another Contract Management document within this project to link to this RFI
- **Change Management Number** – if the change management process is initiated from this document, the change management number will automatically display in this field. There is no manual entry in this field.
- **Architect Number –** if applicable, enter the corresponding reference document number from the Architect. This will allow the Architect to more easily reference the RFI number against any documentation they would generate.
- **Subcontractor Name** – if applicable, click the select button next to the field to choose the subcontractor's name from the contact list. If the Subcontractor's name is not listed, contact the SDA's Contract Management Help Desk (609-943-4500) to have the name added to the list.
- **Subcontractor Number –** if applicable, enter the corresponding reference document number from the subcontractor. This will allow the subcontractor to more easily reference the RFI number against any documentation they would generate.

An example of a completed section is shown:



D. Drawings Tab

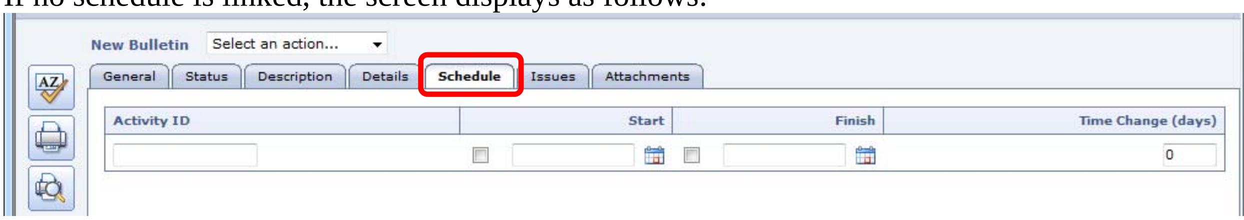


We are currently not using this tab.

E. Schedule Tab

If this change will impact the project schedule, the change in days can be noted in this section.

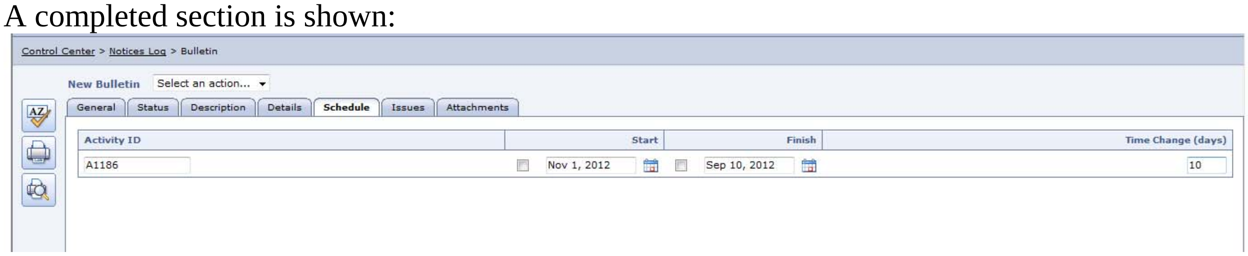
If no schedule is linked, the screen displays as follows:



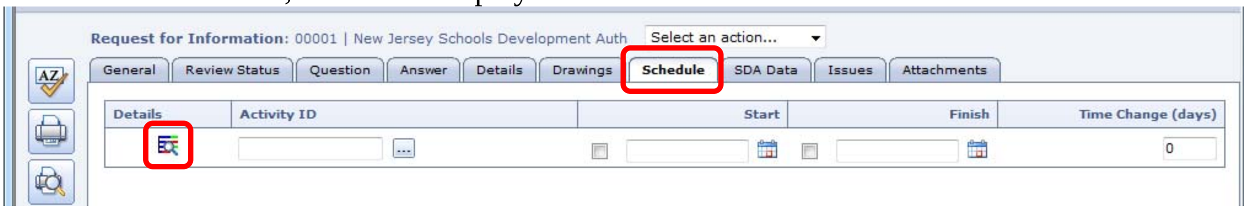
- **Activity ID –** if applicable, enter the activity ID
- **Start –** if applicable, enter the start date of work related to this change. Click the checkbox to indicate if this is an actual start date
- **Finish –** if applicable, enter the end date of work related to this change. Click the checkbox to indicate if this is an actual finish date
- **Time Change (days) –** if applicable, enter the number of days expected to alter the work schedule

Note: You will not be updating the actual scheduled dates, this is only an indication of a possible change in the project schedule.

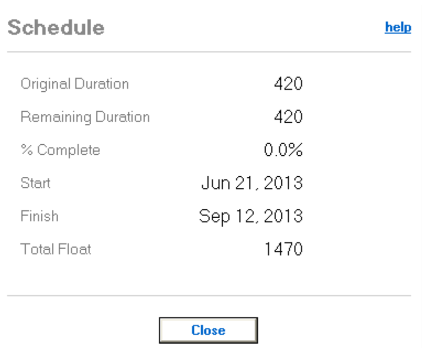
A completed section is shown:



If a schedule is linked, the screen displays as follows:



- **Details** - Click the magnifying glass icon to open the **Schedule** dialog box to view early/actual start and finish dates, original and remaining durations, percent complete, and total float for a document linked to a Project Management activity. This is for informational purposes only. Click the **Close** button to return to the contractor claim document.



- **Activity ID –** Click the **select** link to choose a scheduled activity from the **Select Activity** dialog box.
- **Start / Finish –** Once an Activity ID is selected, the start and finish dates for that task will be populated. Edit the dates as necessary by clicking the **calendar icons**. Click the checkboxes to indicate if these are actual start and finish dates.

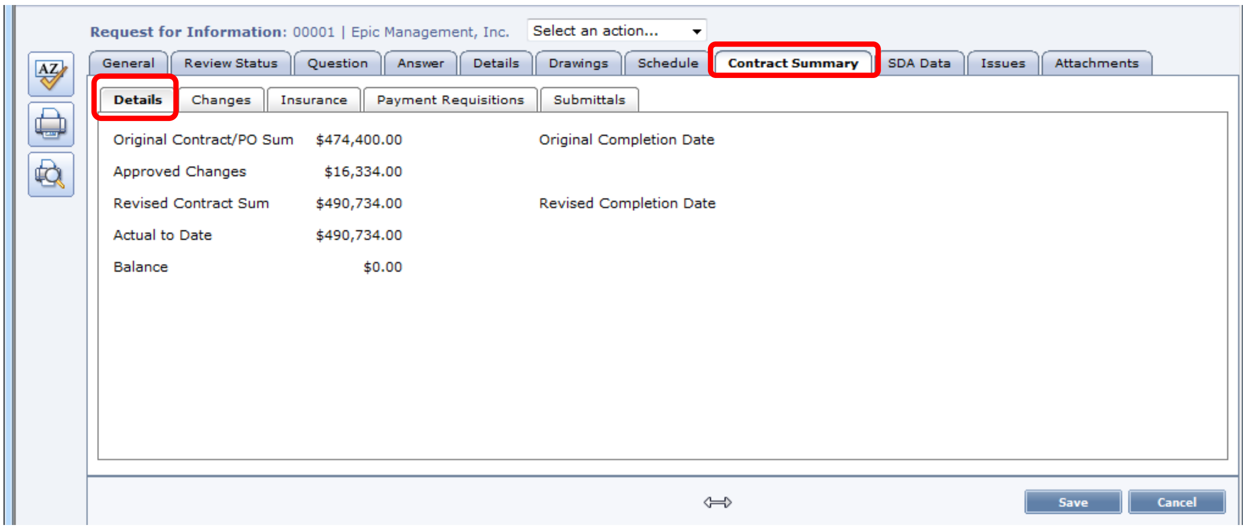
Note: you will not be updating the actual scheduled dates, this is only an indication of a possible change in the project schedule.

An example of a completed Schedule section is shown:

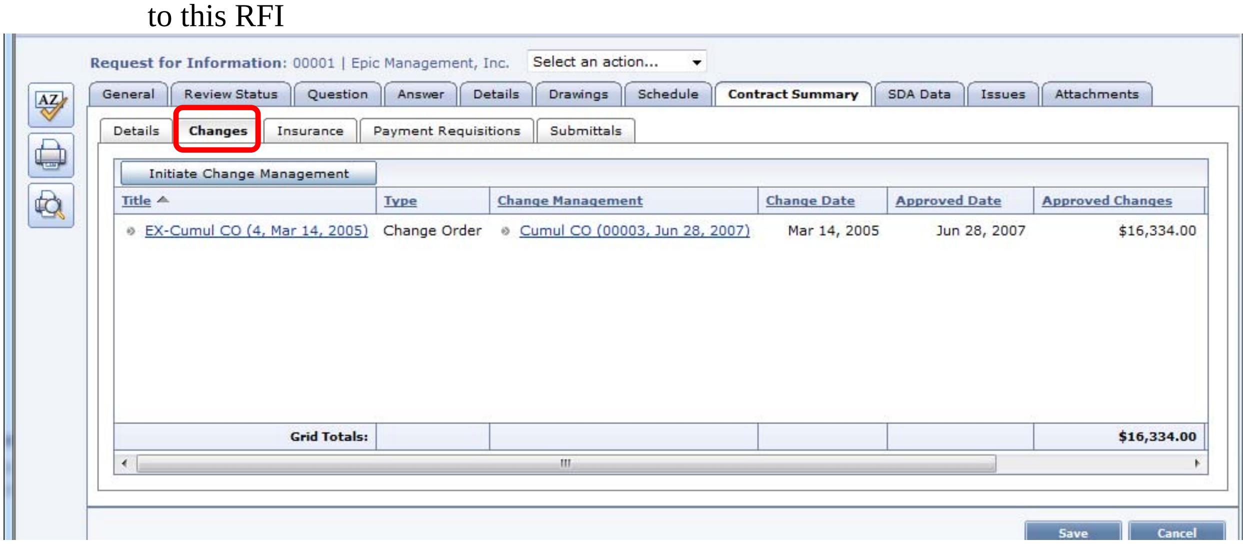
F. Contract Summary Tab

Note: this tab displays only after a contract is selected on the Details tab and the document is saved. If the document needed to be saved, you will need to click the edit button to continue editing the document. There are several sub-tabs on this tab:

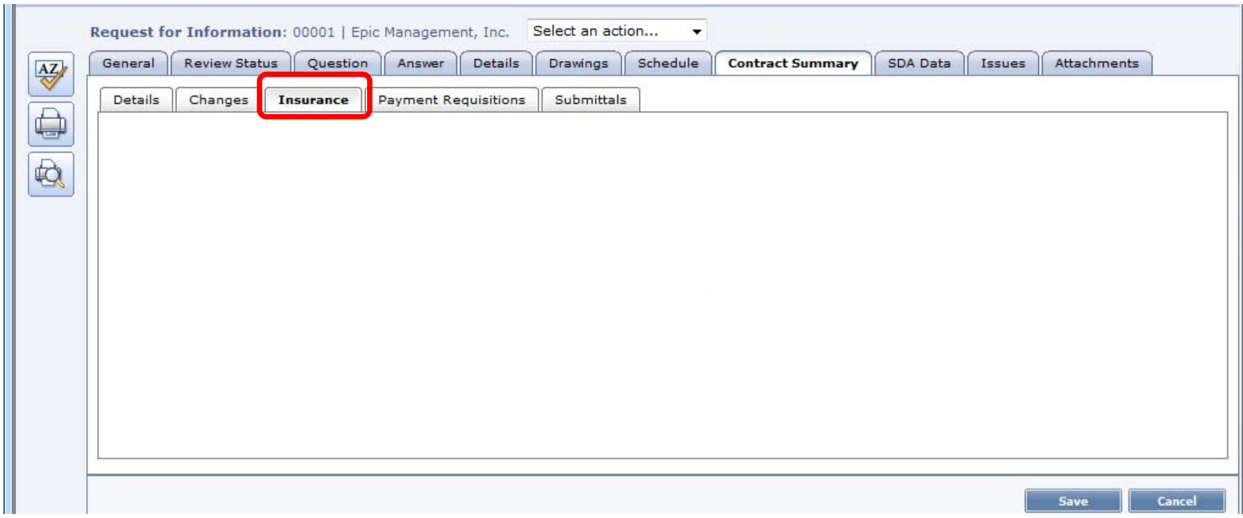
- **Details** – displays summary information about the contract



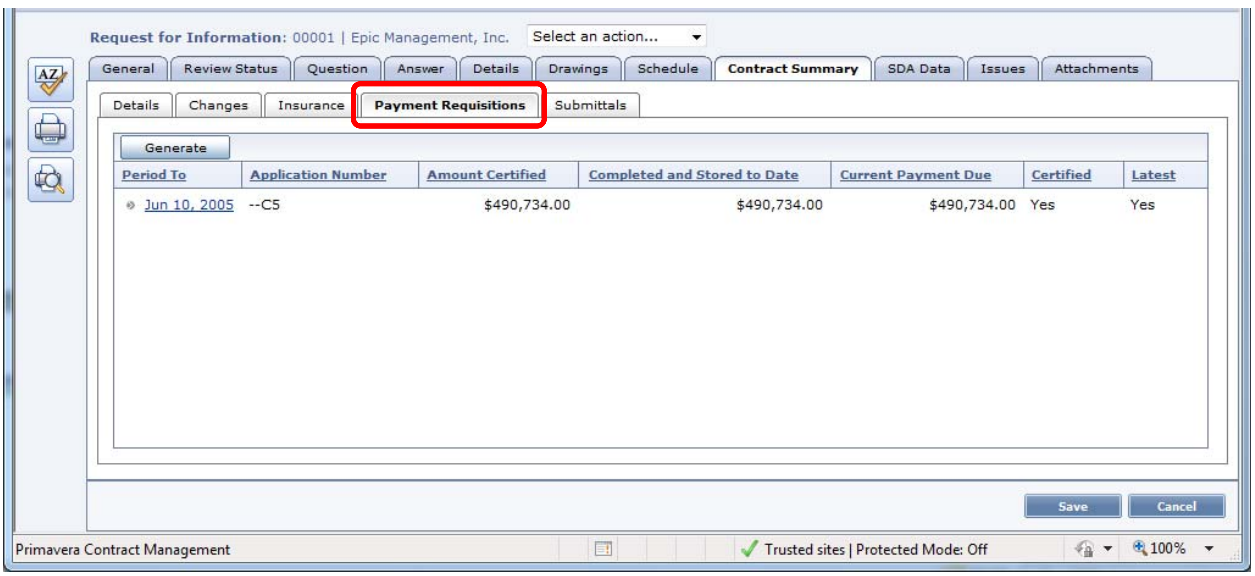
- **Changes** – displays all change documents associated with the contract linked to this RFI



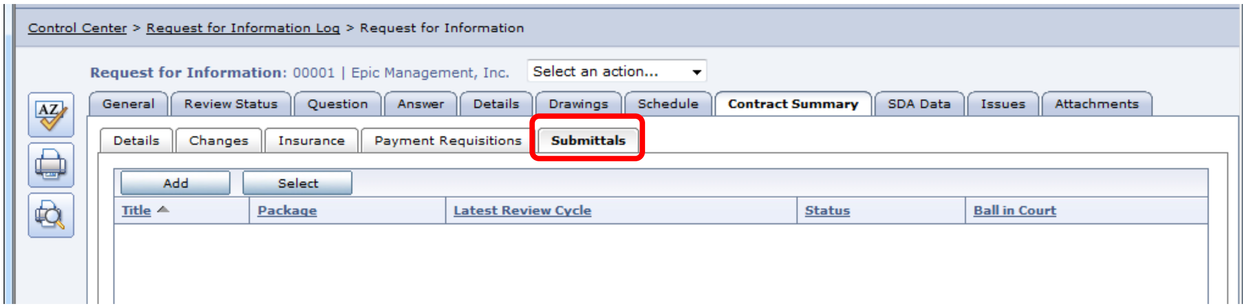
- **Insurance** –displays all insurance policies associated with the contract linked to this RFI (depending on your level of system access)



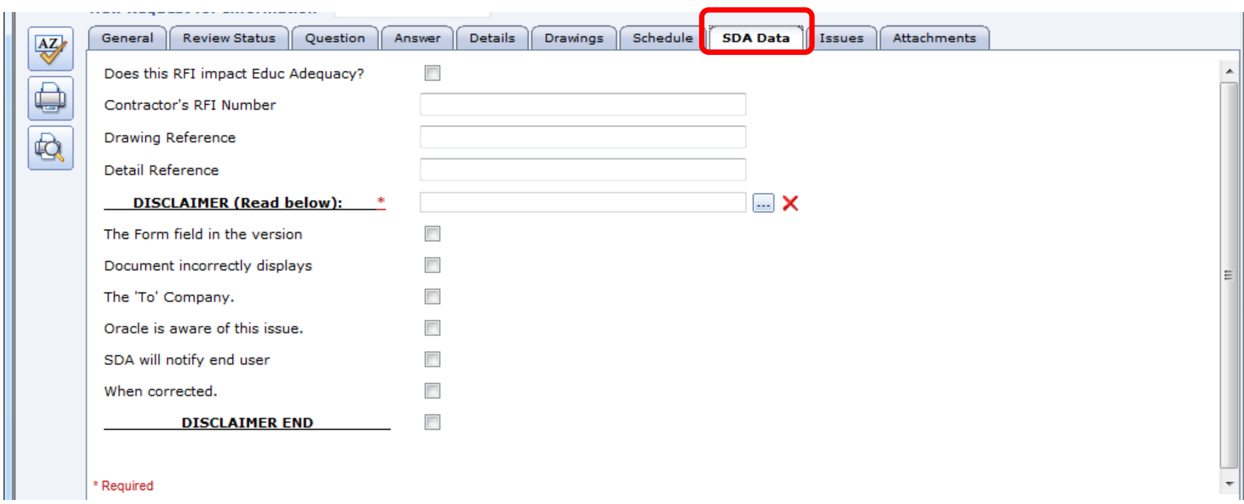
- **Payment Requisitions** – displays all payment requisitions associated with the contract linked to this RFI



- **Submittals** – displays all submittals associated with the contract linked to this RFI



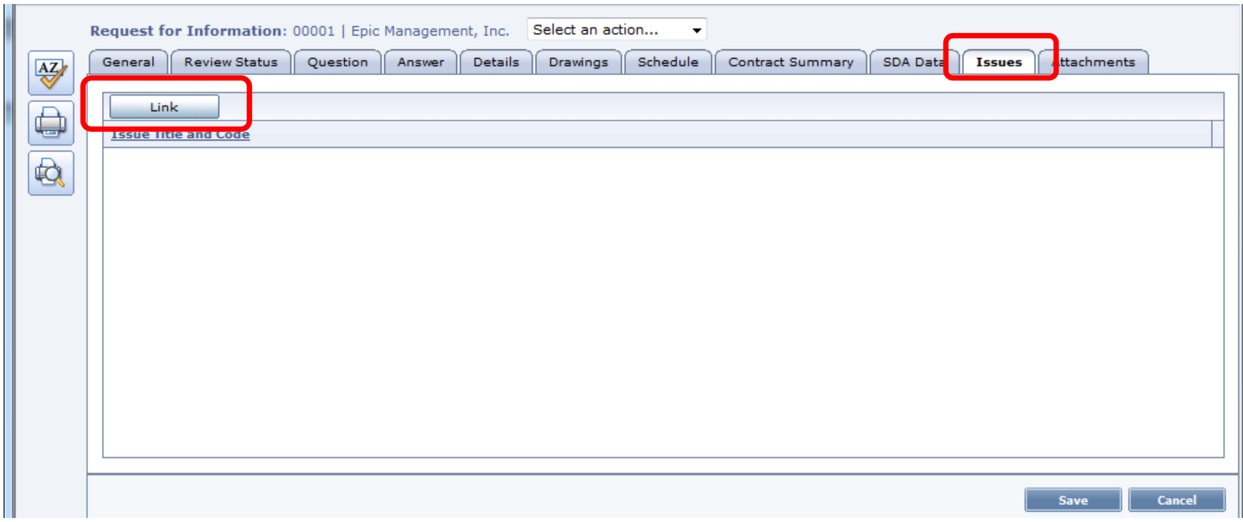
G. SDA Data Tab



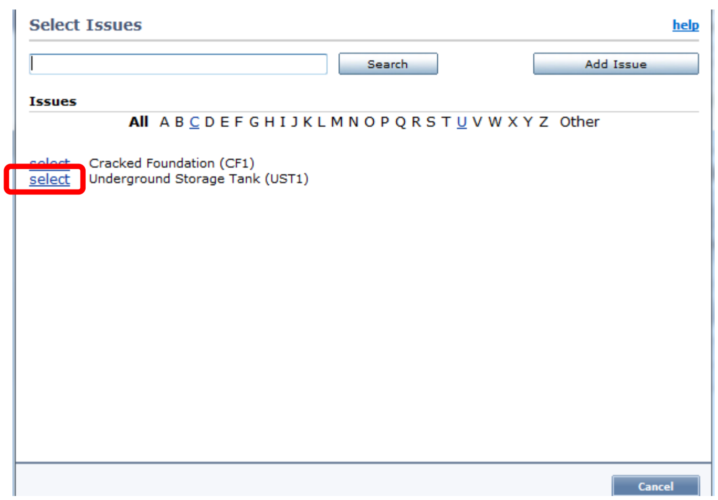
- **Does this RFI impact Educ Adequacy?** – this checkbox will indicate if this RFI will impact the educational adequacy of the school as determined by DOE's "Facilities Efficiencies Standards" which includes grade levels, educational objectives, programs and services. Check the box if this answer is **Yes**.
- **Contractor's RFI Number -** if applicable, enter the corresponding reference document number from the contractor. This will allow the contractor to more easily reference the RFI number against any documentation they would generate.
- **Drawing Reference –** if applicable, enter a reference to a contract drawing (i.e., architectural or structural)
- **Detail Reference** – if applicable, enter a detail of a contract drawing that specifies a particular section of that contract drawing
- **Disclaimer** – this field indicates that there is a known error in the From field on the RFI Version document which incorrectly displays the company name. Click the **select button** to choose the acknowledgement for the disclaimer notice. This is a required field.

H. Issues Tab

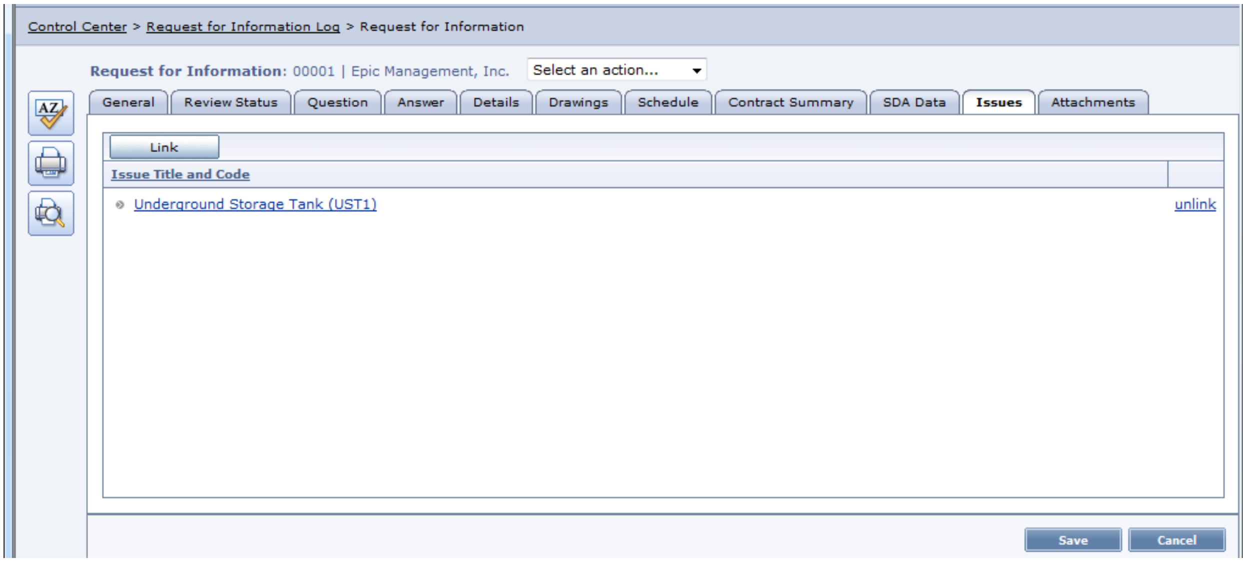
If this RFI relates to an Issue that was previously entered in the Issues log, it can be linked to this document. Click the **Link** button.



The **Select Issues dialog box** displays. Locate your desired issue and click the **select** link to the left of the issue title to link it to the RFI. Once you click the select link, you will return to the RFI.

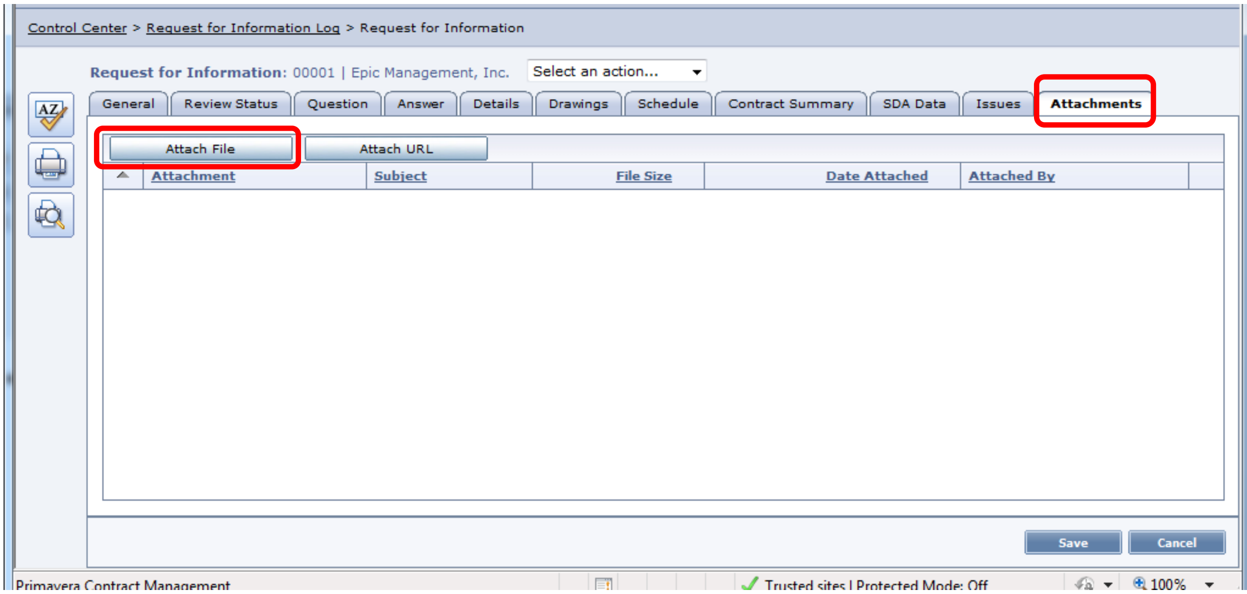


An example of a completed section is shown:

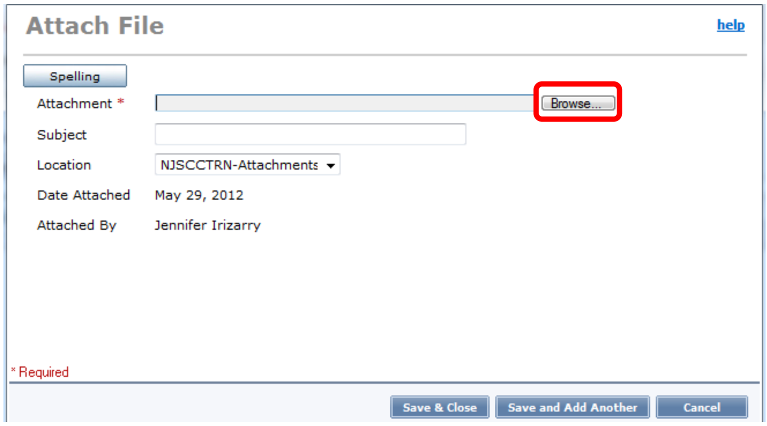


I. Attachments Tab

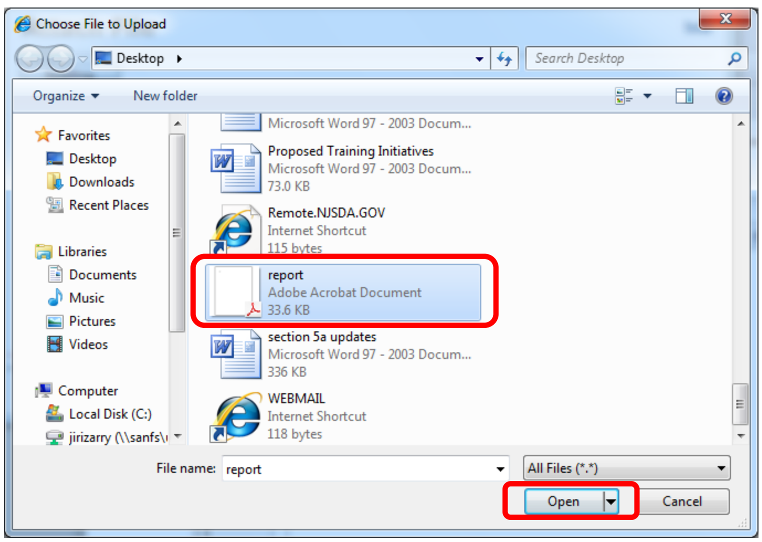
To attach supporting documentation, click the **Attach File** button.



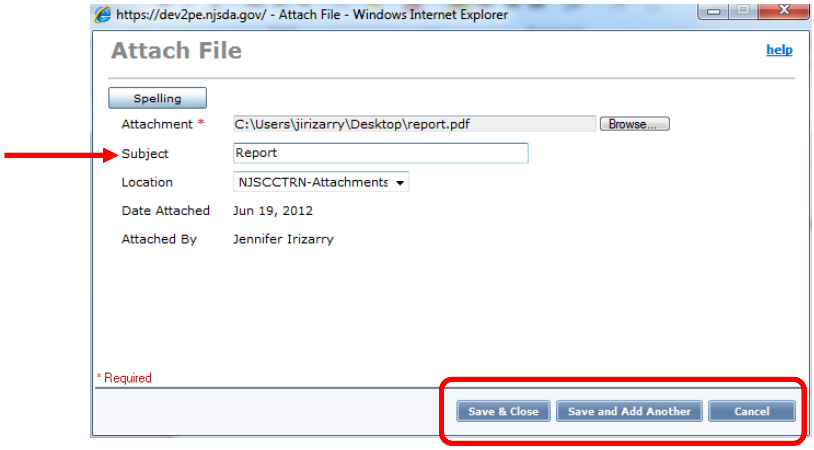
Click the **Browse** button to navigate to the document you wish to attach.



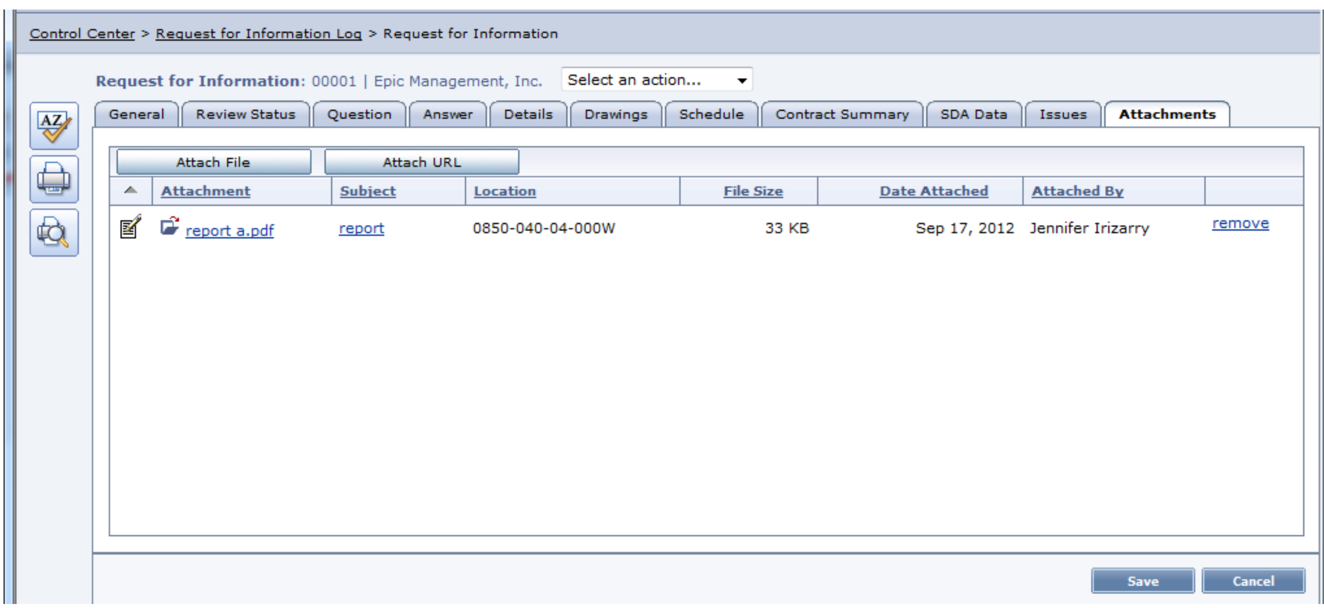
The **Choose File to Upload** window displays. Navigate to the desired file location, click on the file to highlight it, and click the **Open** button.



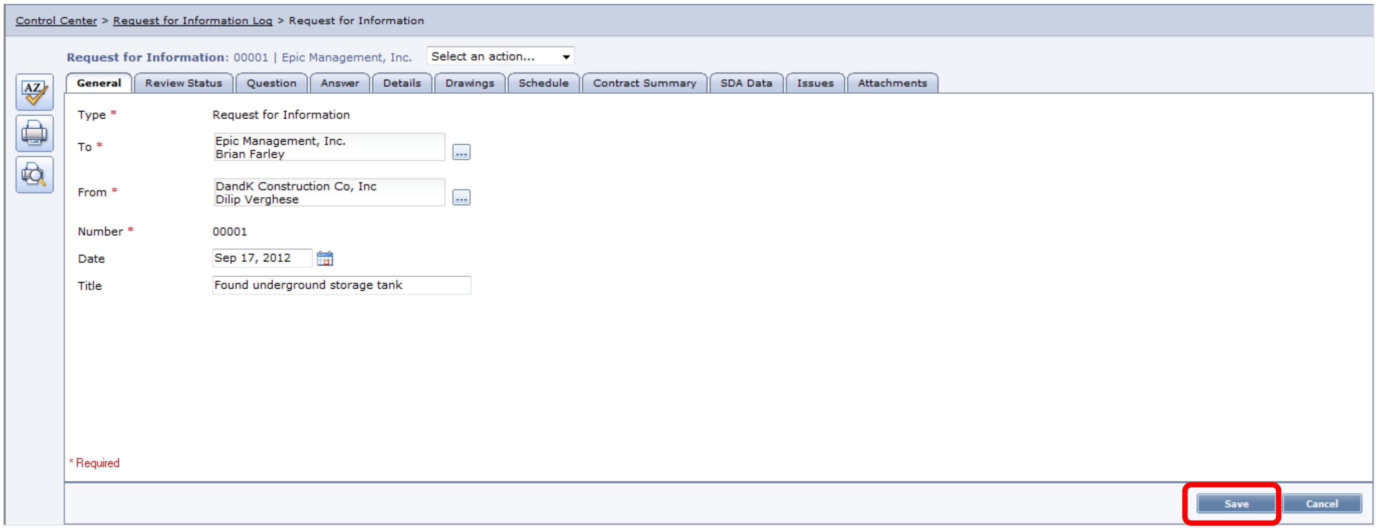
Enter the subject and/or name of the document in the **Subject** field and click **Save and Close**. You can also choose the **Save & Add Another** button to add additional documents repeating the same process.



The attached file displays in the **Attachments** section.



When all fields on the document are completed, click the **Save** button at the bottom of the document window.



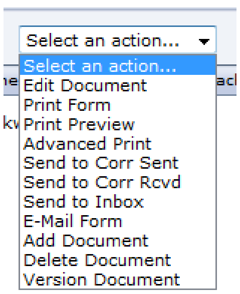
II. Version Document

Contract Management 13.0 provides a Version Document feature to help you maintain multiple versions of your documents and provide a snapshot of the change history of the documents. Versioning a document means it will maintain versions of both the document and any attachments. The document version will be stored as an html file. The attachment version will show information on the location, path and the file size of an attachment, as well as the user who attached the file to the document and the date of attachment.

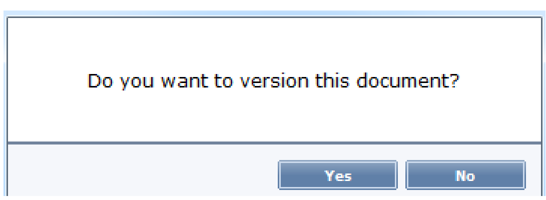
The Versions Tab will be used to track document versions. This tab only displays when you open the document in View mode, not in Edit mode. On the Versions tab, you can view and access previous versions of the selected document, identify who created the versions and when the versions were created.

A. Create a Document Version

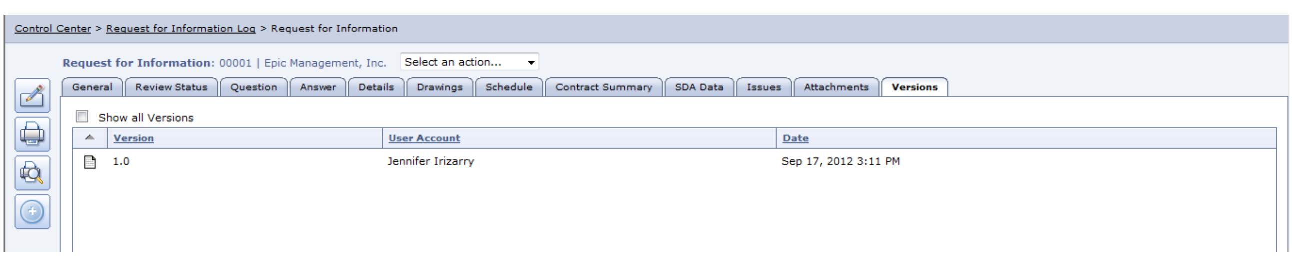
1. To create a version of the current document, click the Select an Action menu from the top of the screen and choose Version Document from the drop-down list.



2. Contract Management will prompt you to confirm the Version Document function. Click the Yes button to continue or No to cancel.

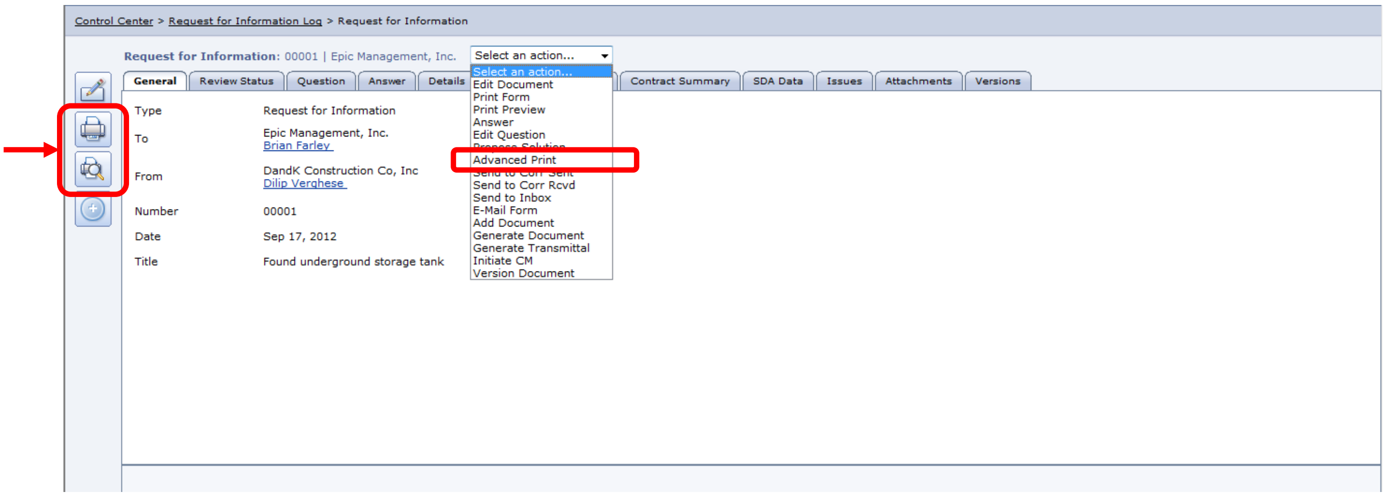


3. The Versions tab displays the document version you just created. As new document versions are created, they will be listed on this tab in reverse chronological order. Click the icon to open each version. When the version displays, it will show information available in the document when the version was created.

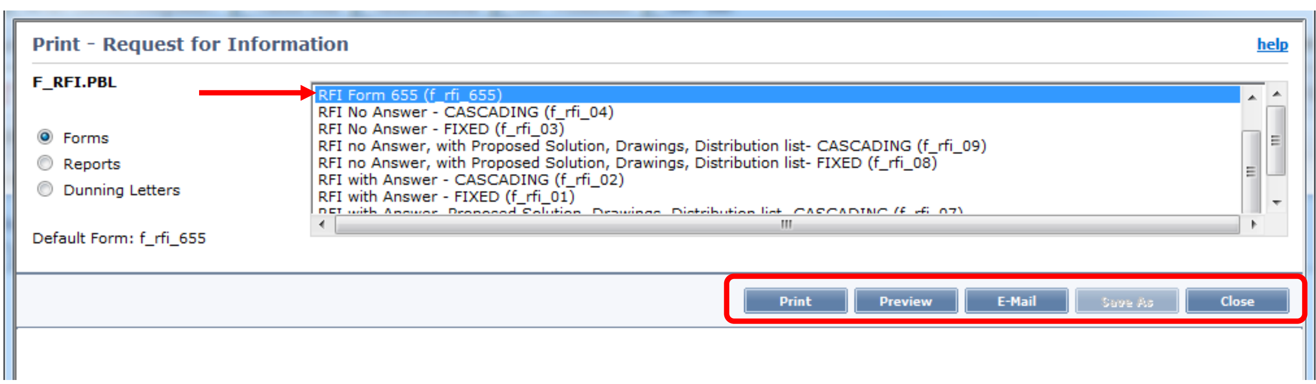


III. Print an RFI

To print the RFI (SDA Form 655), choose either the **Print Form** button or **the Print Preview** button on the left side of the screen. If you choose the Print Preview, select the **Print** button to print the report when the preview displays. Additionally, you can choose **Advanced Print** from the **Select an Action menu** on the top of the screen.



Choose **RFI Form 655** from the report list.

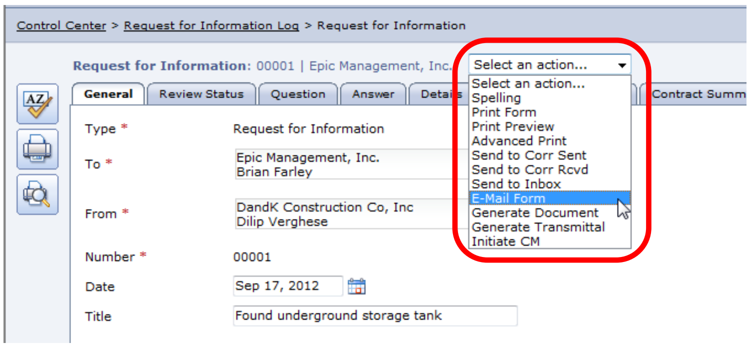


- Click **Print** to get a printed output or to create a PDF file
- Click **Preview** to see your output displayed in the window
- Click **E-Mail** to electronically send the output to another user
- Click **Save As** to save the output to your local computer or other desired location
- Click **Close** when finished to return to the RFI document

IV. E-mailing an RFI

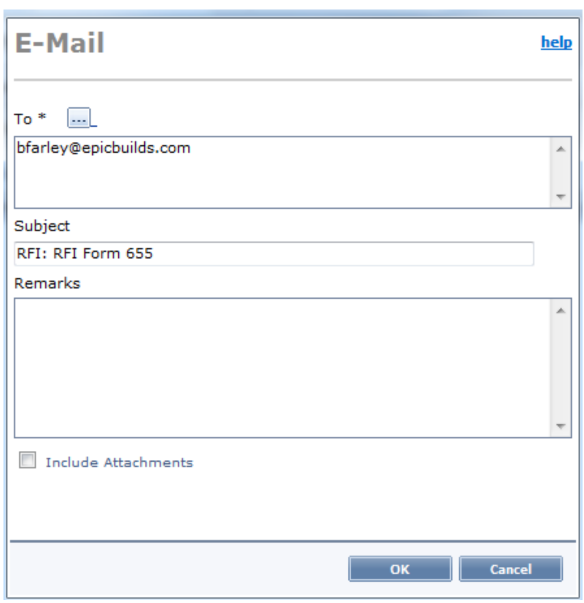
RFIs can be e-mailed from within the Contract Management application.

To e-mail and RFI, click the **Select an Action** menu at the top of the screen and select the **E-Mail Form** option.



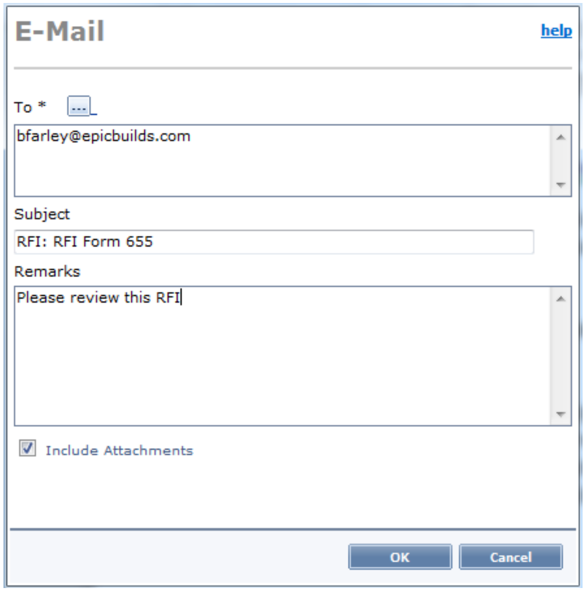
When the e-mail form dialog box displays, enter all desired contacts in the **To** field by either clicking the **select button** to choose their names from the contact list, or by manually entering their e-mail information. By default, the name selected in the From field on the document will automatically display in the To field.

Note: it is recommended that the user sending the e-mail should always include their e-mail address in the To field.



If desired, change the default **Subject**. This is the text that will display in the subject line of the e-mail. Additionally, any **Remarks** that are entered will be included in the body of the e-mail message. If there are attachments associated with the RFI that should be included in the e-mail, click the **Include Attachments** checkbox.

When all desired fields are completed, click the **OK** button to send your e-mail.



Once they receive the e-mail, recipients who already have a Contract Management login will be able to view the RFI through a link that will be provided in the message. Recipients who do not have a login will be able to view the information through the attachments section of the e-mail.

V. Selecting the RFI Status

The next time that the PMF/CM logs in to Contract Management, the RFI in question will appear in the PMF/CM's **Actions List** on the Control Center (because the PMF/CM has been selected as the *To* contact, so the PMF/CM has the Ball-in-Court). The PMF/CM will research the request in comparison with the scope of work outlined in the contract to determine what course of action should be taken.

Depending upon the nature of the RFI, the PMF/CM will take one of three actions:

1. The PMF/CM will answer the question directly and deem it part of the GC's contract. (directions begin on page)

2. The PMF/CM is unable to immediately and directly answer the question and requires supporting documentation to be compiled by the A/E. (directions begin on page)

3. The PMF/CM determines upon review of the RFI that the issue described is outside the scope of the GC's original contract and initiates Change Management. (directions begin on page)

NOTE: A status of **Cancelled** is available. A Cancelled status indicates that the document is no longer required, but should be retained for historical purposes. A cancelled document cannot be reopened for processing.

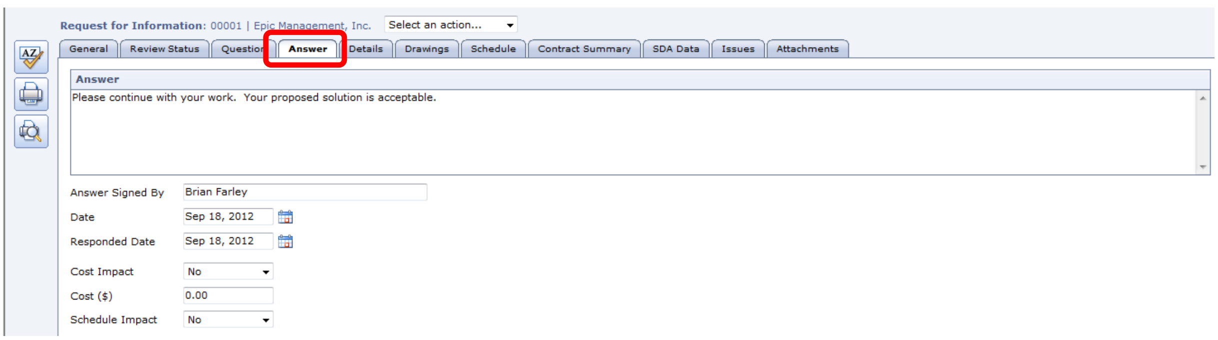
NOTE: Regardless of which scenario is followed, an RFI can be closed by the PMF/CM at any point during the process.

A. RFIs that the PMF/CM is able to answer directly (no impact on scope of work)

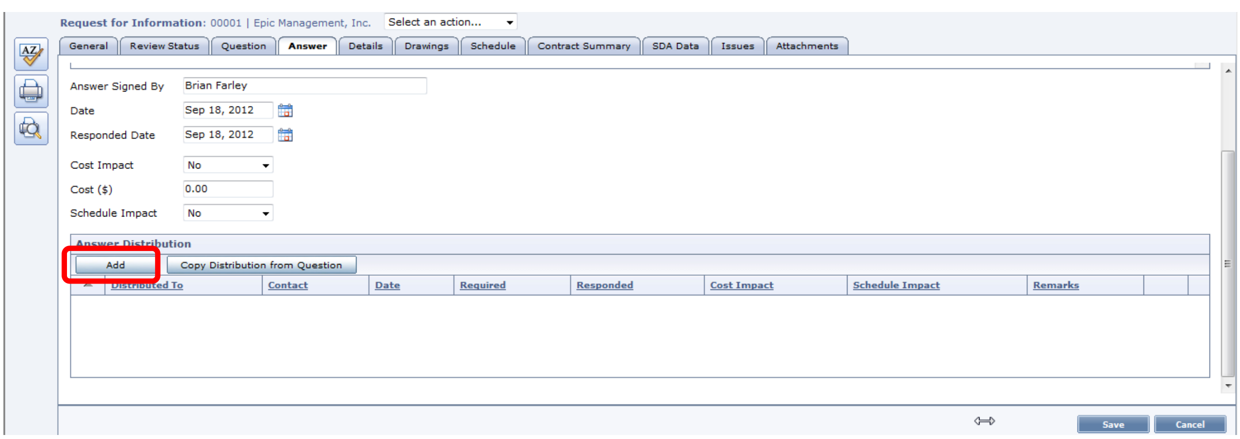
NOTE: If you are beginning from this point, perform the following steps to open the RFI:

- ***Log in to Contract Management***
- ***Locate your project from the project list***
- ***Choose the Communication folder and click Request for Information***
- ***Locate your desired RFI from the log and open in edit mode***

1. With the applicable RFI opened, click the **Answer** tab. The PMF/CM's response to the GC is entered in the **Answer** field. Enter the **Date** and, if applicable, the **Responded Date** can be set as well if the response is not actually sent on the same day that the document is initially created. Additionally, if there is an anticipated cost or schedule impact, enter that information in the **Cost Impact**, **Cost ($)** and **Schedule Impact** fields.

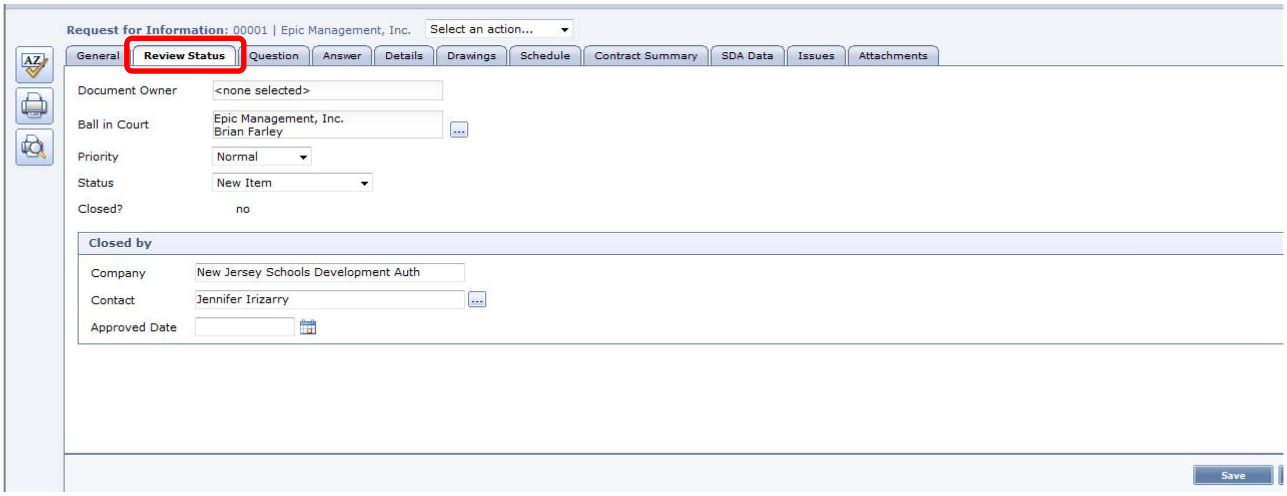


2. If there are others who should be informed of this answer, scroll to the **Answer Distribution** section. Click the **Add** button and choose the desired names from the contact list.

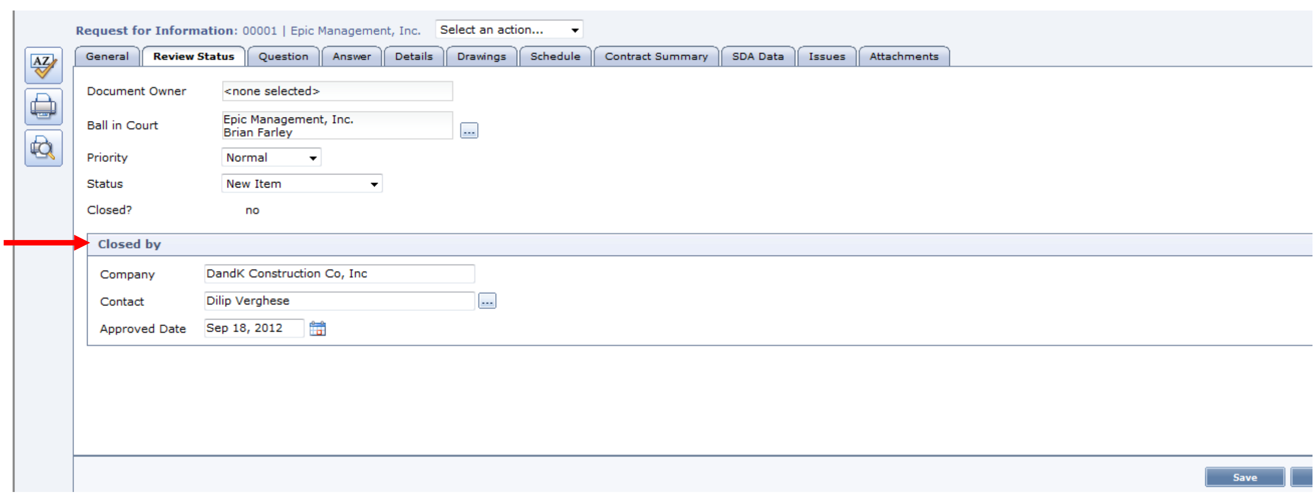


3. When completed, click the **Review Status** tab. The PMF/CM sets the **Ball-in-Court** to the GC by clicking the **select** button to choose their name from the contact list.

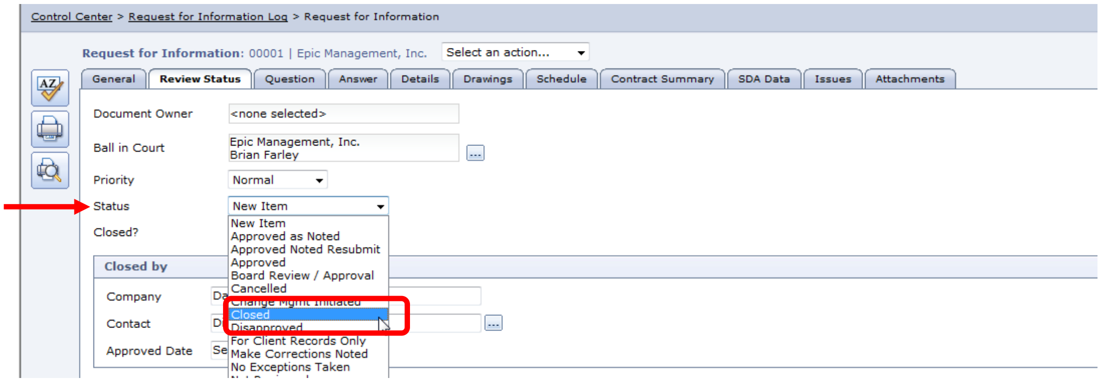
   Note: There are two items in this section that we are currently not using. The first is a check box labeled **Do not check or this document will need to be deleted.** Do not check this box. The second is **Document Owner**, relating to functionality we are currently not using.



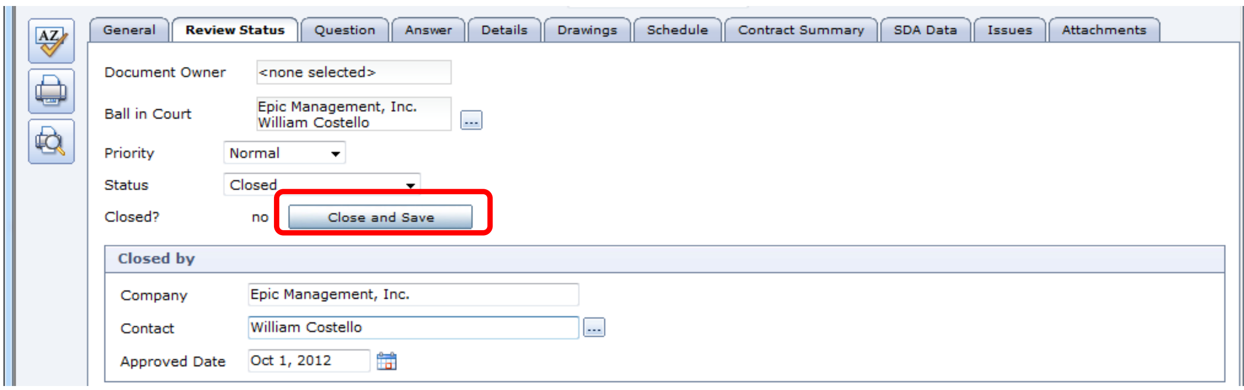
4. Once the GC has completed their review, the **Ball-in-court** is set back to the PMF/CM to close the RFI. To close the RFI, complete the information in the **Closed By** section.



5. Click the drop down box on the **Status** field and select **Closed** from the list.



6. Click the **Close and Save** button to close the document.



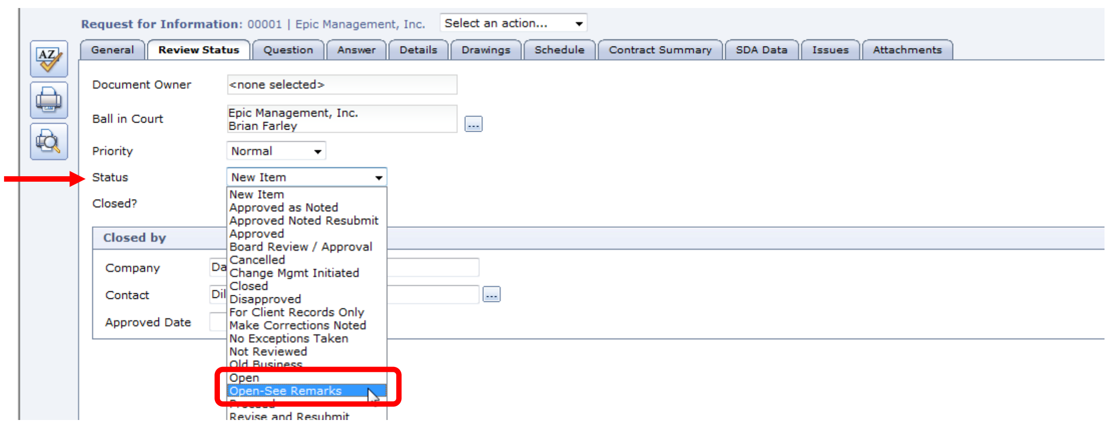
7. The **closed?** field now displays **yes**. This means the document can no longer be edited.

B. RFIs which the PMF/CM is unable to answer directly (but which fall within the original scope of the contract)

NOTE: If you are beginning from this point, perform the following steps to open the RFI:

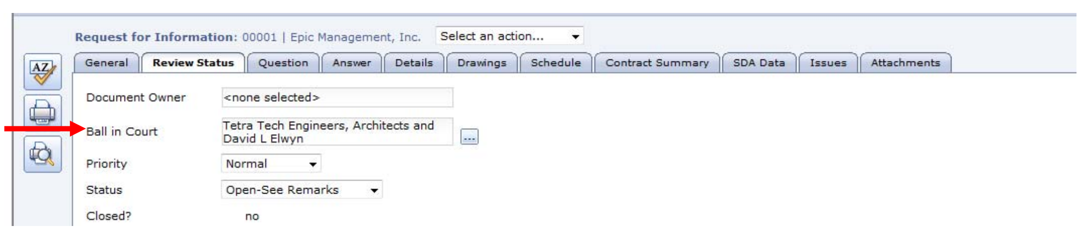
- *Log in to Contract Management*
- *Locate your project from the project list*
- *Choose the Communication folder and click Request for Information*
- *Locate your desired RFI from the log and open in edit mode*

1. With the applicable RFI open, click the **Review Status** tab and set the status of the RFI to **Open-See Remarks**.

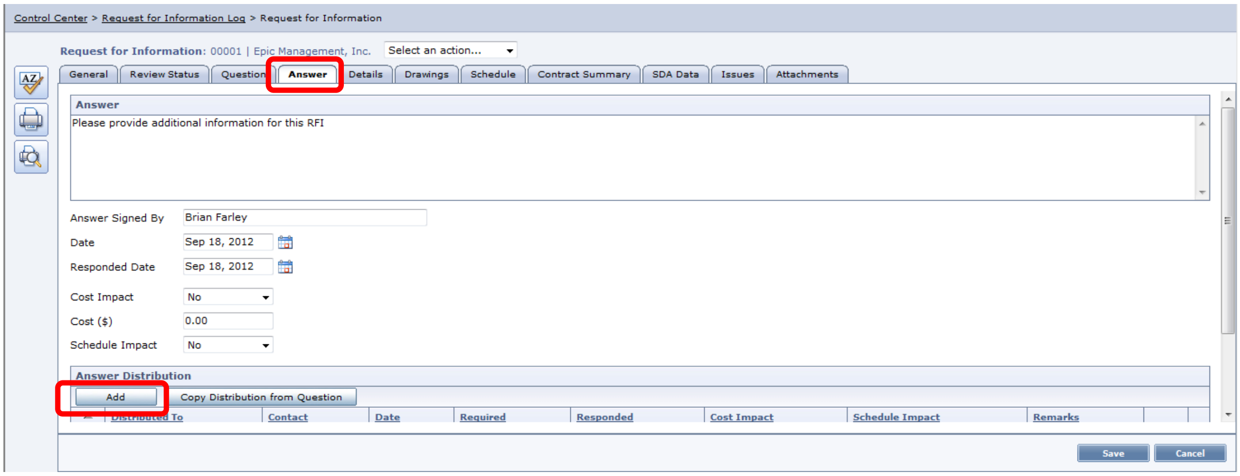


2. Set the **Ball-in-Court** to the A/E by clicking the **Select** button and choosing the A/E's name from the list of contacts.

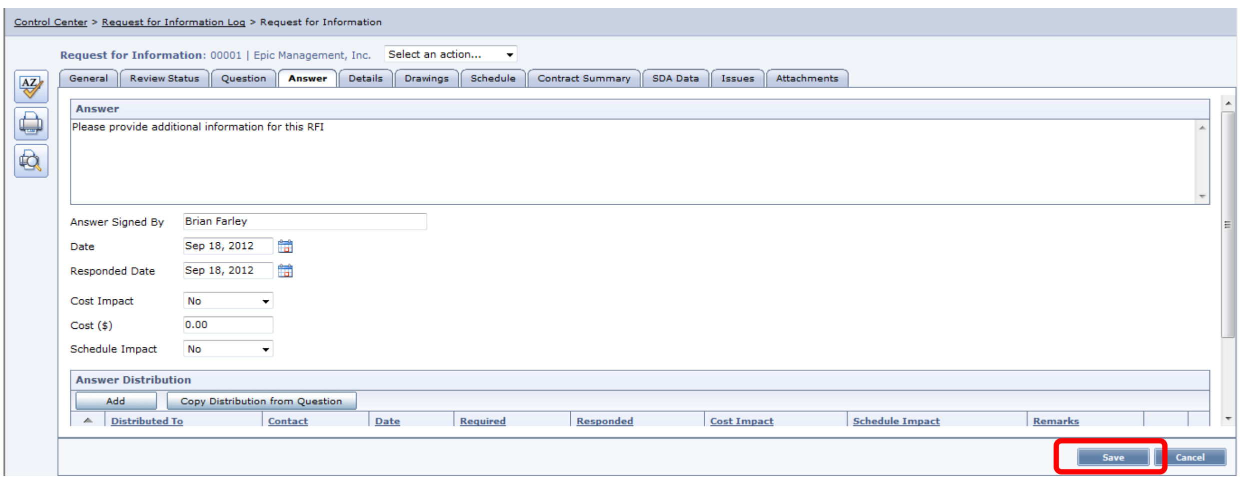
Note: There are two items in this section that we are currently not using. The first is a check box labeled **Do not check or this document will need to be deleted.** Do not check this box. The second is **Document Owner**, relating to functionality we are currently not using.



3. Click the **Answer** tab to enter any desired instructions for the A/E. If there are others who should be informed of this answer, they can be added in the **Answer Distribution** section by clicking the **Add** button. Choose the desired names from the contact list.

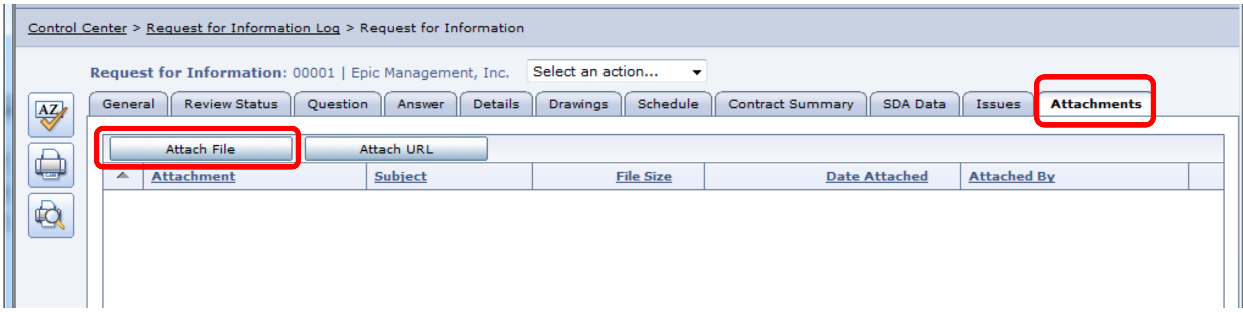


4. When all information is entered, click the **Save** button at the bottom of the screen.

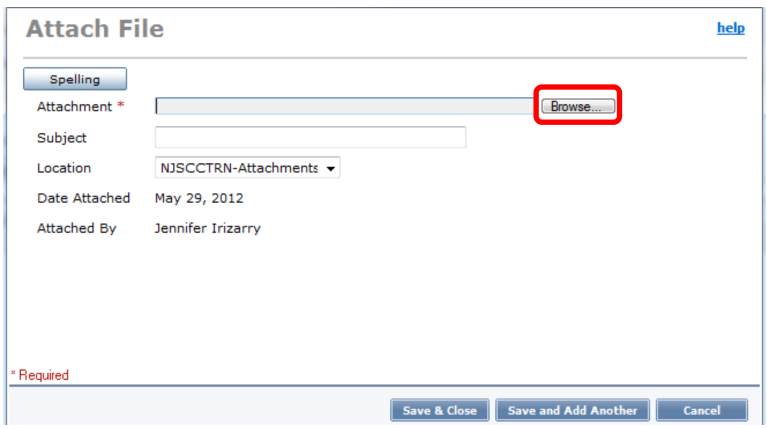


When the **A/E** logs on to Contract Management, the RFI will be listed on his/her actions list on the Control Center. The **A/E** prepares the requested documentation, attaches it to the Attachments section of the RFI, adds his/her instructions to the GC in the **Answer** field of the document, and sets the **Ball-in-court** back to the PMF/CM.

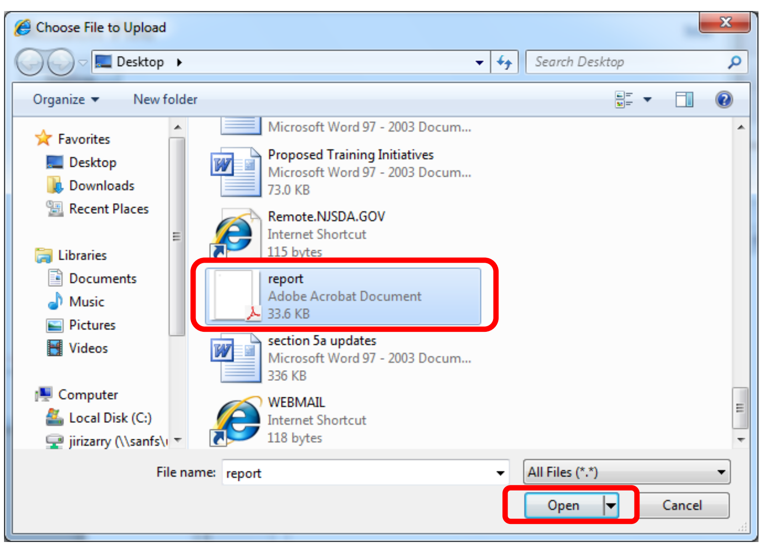
To attach supporting documentation, click the Attachments tab and click the **Attach File** button.



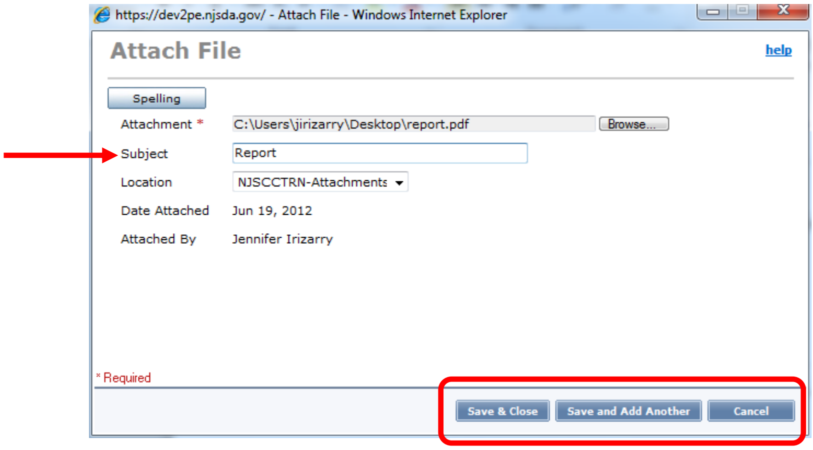
Click the **Browse** button to navigate to the document you wish to attach.



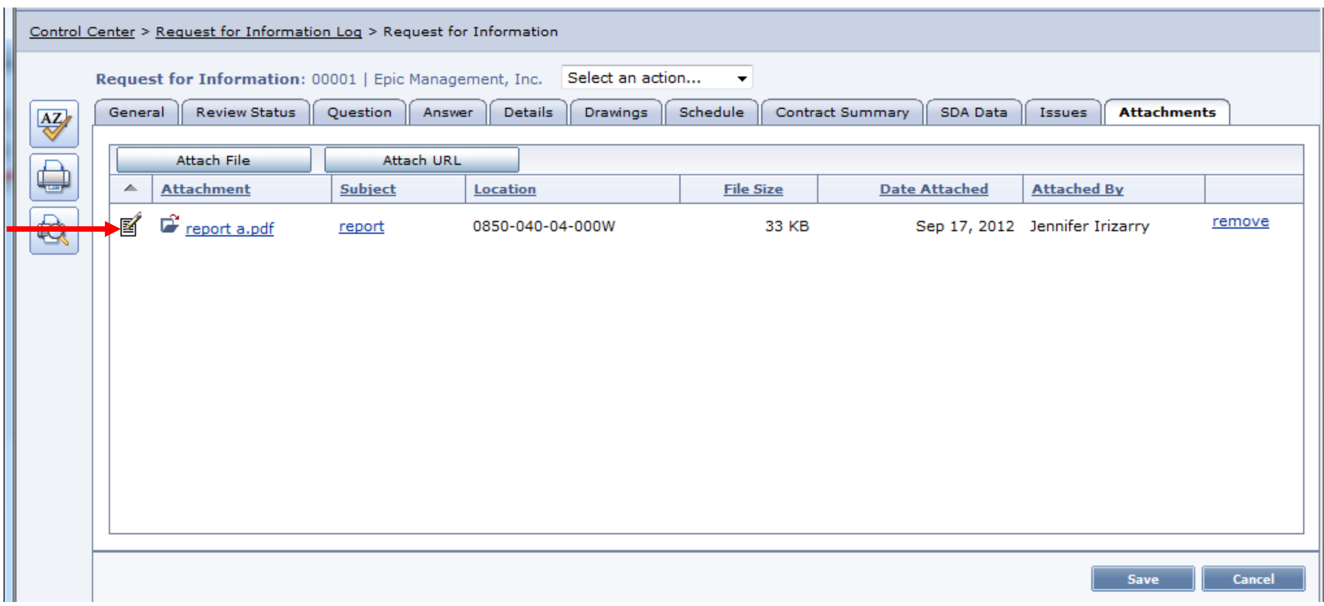
The **Choose File to Upload** window displays. Navigate to the desired file location, click on the file to highlight it, and click the **Open** button.



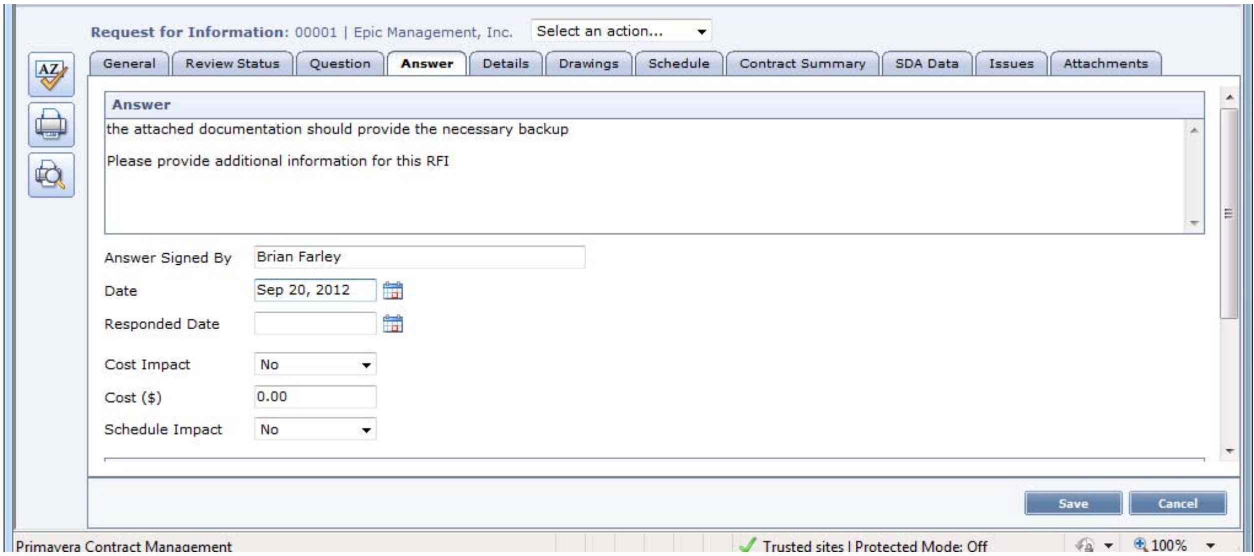
Enter the subject and/or name of the document in the **Subject** field and click **Save and Close**. You can also choose the **Save & Add Another** button to add additional documents repeating the same process.



The attached file displays in the **Attachments** section.

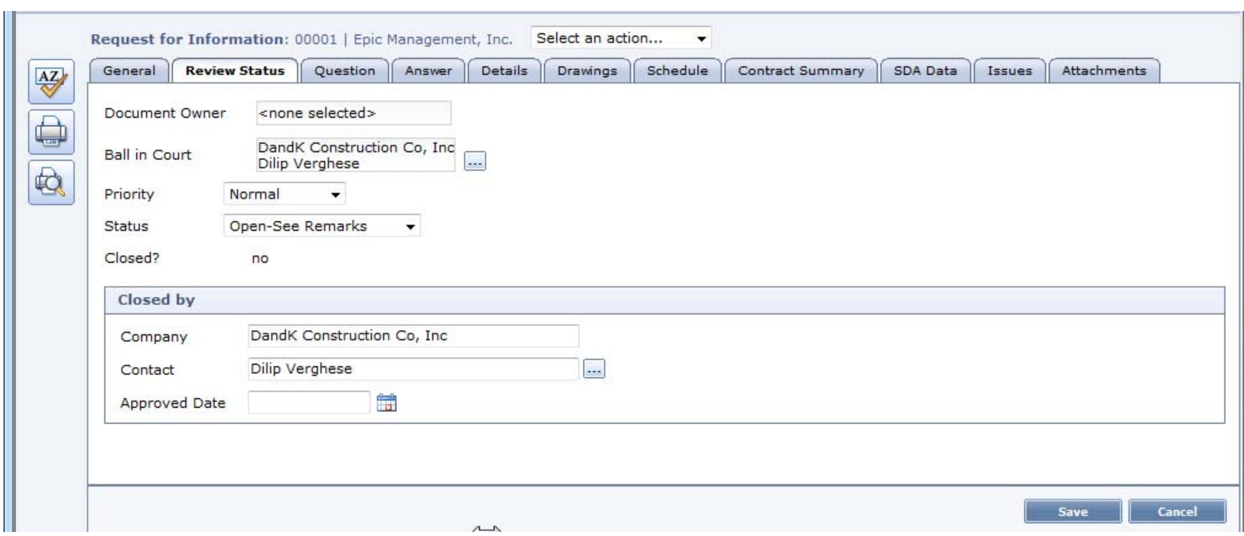


5. The PMF/CM will click the **Answer** tab and add any additional instructions to the GC in the **Answer** section of the document. Update the name in the **Answer Signed by** field, and enter the date answered.



6. Click the **Review Status tab** and set the Ball-in-Court to the GC by clicking the Select button and choosing the GCs name from the list of contacts. When all information is completed, click the **Save** button at the bottom of the screen.

Note: There are two items in this section that we are currently not using. The first is a check box labeled **Do not check or this document will need to be deleted.** Do not check this box. The second is **Document Owner**, relating to functionality we are currently not using.



The next time the GC logs in to Contract Management, he/she will see the A/E's /PMF/CMs reply, review the attached documentation and instructions and set the Ball-in-court back to the PMF/CM to mark the document as closed.

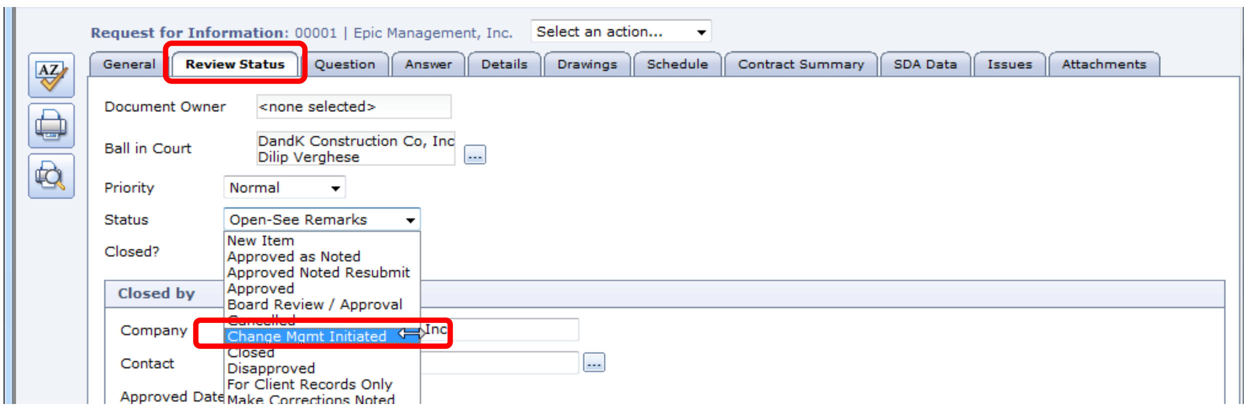
C. Work Outside the Scope of Contract

If the PMF/CM determines upon review of the RFI that the issue described is outside the scope of the GC's original contract, the initiation of the change management process will begin after review from the A/E.

NOTE: If you are beginning from this point, perform the following steps to open the RFI:

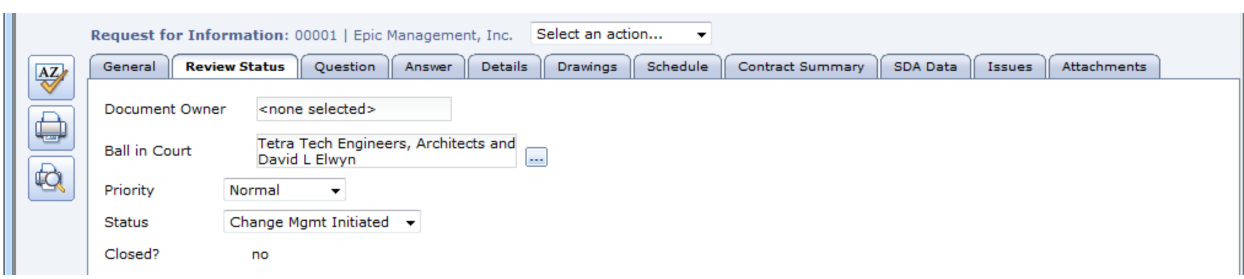
- ***Log in to Contract Management***
- ***Locate your project from the project list***
- ***Choose the Communication folder and click Request for Information***
- ***Locate your desired RFI from the log and open in edit mode***

1. With the applicable RFI open, click the **Review Status** tab, click the drop down list on the **Status** field and select **Change Mgmt Initiated**.

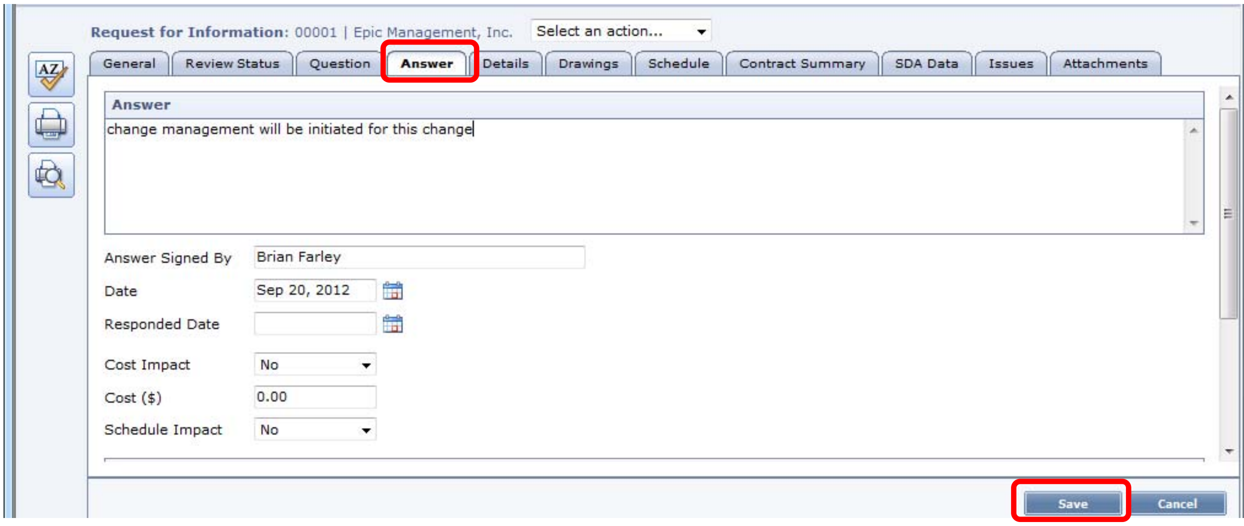


2. Click the **select** button on the Ball-in-Court field and choose the A/E's name from the contact list.

Note: There are two items in this section that we are currently not using. The first is a check box labeled **Do not check or this document will need to be deleted.** Do not check this box. The second is **Document Owner**, relating to functionality we are currently not using.



3. Click the **Answer** tab and enter any applicable comments. Complete the Answer Signed By and Date fields. Click the **Save** button to save your work. Once completed, the A/E will change the Ball-in-Court back to the PMF/CM to begin the initiation of Change Management.



4. The Change Management process will then be initiated from this RFI. All files attached to this record will be copied to the records created in subsequent phases (Contract Change Request/Authority, Contractor Proposal, Authority Agent Recommendation and Change Order).