



STATE OF NEW JERSEY

**SCHOOLS DEVELOPMENT AUTHORITY**

## **Section 7**

# **Request for Information (RFI)**

**ORACLE** Primavera

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## Table of Contents

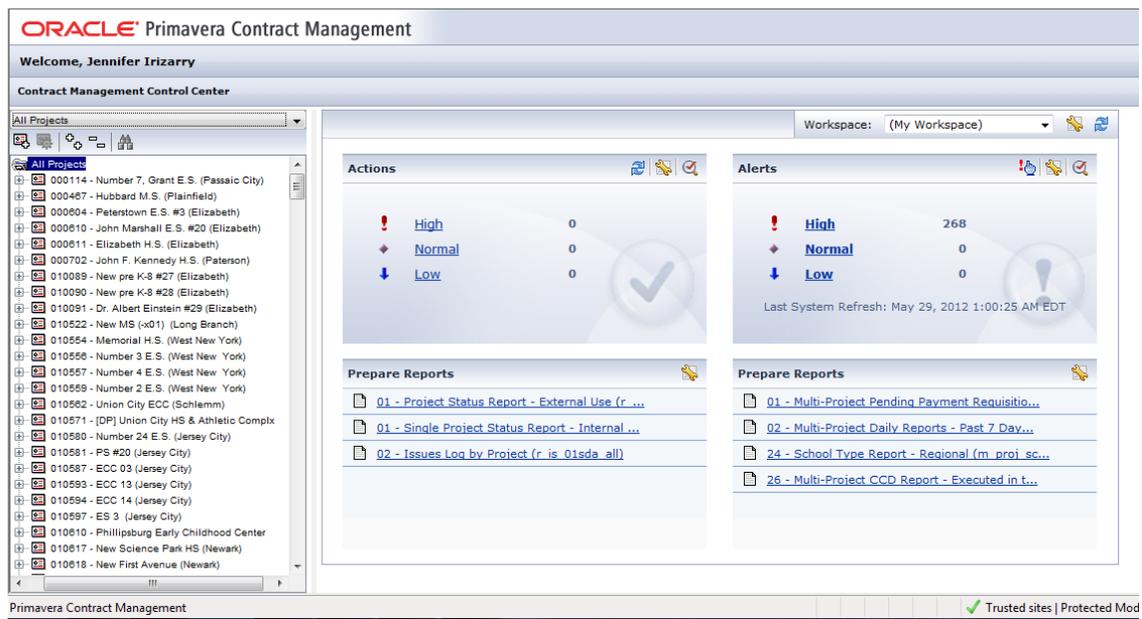
Section Title	Page Number
<b>I. Create a Request for Information (RFI)</b>	3
A. General Tab	5
B. Question Tab	6
C. Details Tab	7
D. Drawings Tab	8
E. Schedule Tab	8
F. Contract Summary Tab	10
G. SDA Data Tab	12
H. Issues Tab	13
I. Attachments Tab	14
<b>II. Version Document</b>	18
<b>III. Print an RFI</b>	19
<b>IV. E-Mailing an RFI</b>	20
<b>V. Selecting the RFI Status</b>	22
A. RFIs that the PMF/CM is able to answer directly	23
B. RFIs which the PMF/CM is unable to answer directly	26
C. Work Outside the Scope of the Contract	31

## I. Create a Request for Information (RFI)

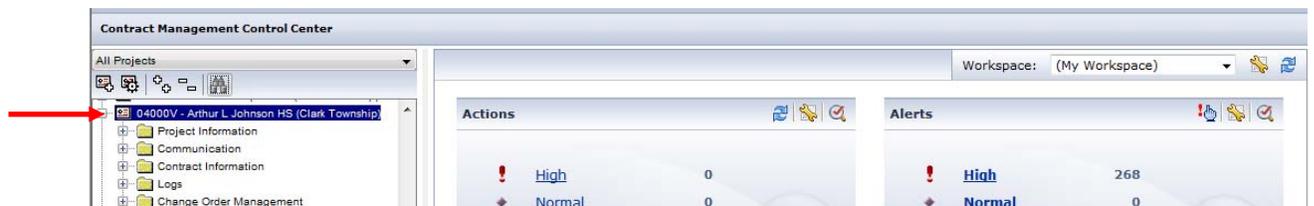
A **Request for Information** is a question submitted to the PMF/CM from the General Contractor (GC). The RFI will detail the nature and reason for a proposed change.

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

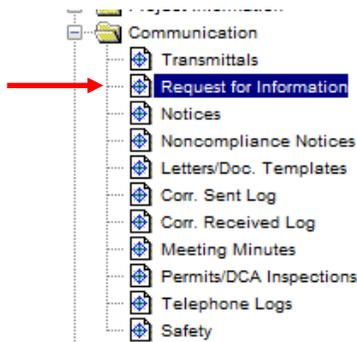
1. Once logged into Contract Management, the **Contract Management Control Center** screen displays (as shown).



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

The screenshot shows the 'New Request for Information' form in the Primavera Contract Management application. The 'General' tab is selected and highlighted with a red box. The form contains the following fields:

- Type: Request for Information
- To: <none selected>
- From: New Jersey Schools Development Auth To Be Determined
- Number: 00001
- Date: Sep 17, 2012
- Title: (empty)

Buttons for 'Save' and 'Cancel' are visible at the bottom right. A '\* Required' label is present at the bottom left.

- **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 only opportunity 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 only opportunity 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:

The screenshot shows the 'New Request for Information' form in the Primavera Contract Management application, with the 'General' tab selected. The form is filled with the following information:

- Type: Request for Information
- To: Epic Management, Inc. Brian Farley
- From: DandK Construction Co, Inc Dilip Verghese
- Number: 00001
- Date: Sep 17, 2012
- Title: Found underground storage tank

Buttons for 'Save' and 'Cancel' are visible at the bottom right. A '\* Required' label is present at the bottom left.

## B. Question Tab

The screenshot shows the 'New Request for Information' form with the 'Question' tab selected. The 'Question' field is empty. The 'Question Signed By' field contains 'Dilip Verghese'. The 'Date' field is empty, and the 'Required Date' field is set to 'Sep 24, 2012'. The 'Question Distribution' section has an 'Add' button and a 'Copy Distribution to Answer' button. Below these buttons is a table with columns for 'Distributed To', 'Contact', 'Date', and 'Remarks'.

- **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:

The screenshot shows the 'New Request for Information' form with the 'Question' tab selected. The 'Question' field contains the text: "During excavation, an underground storage tank was discovered. The tank is approximately 2500 gallons and is extremely rusted. The structural stability is in doubt and will likely have to be removed in pieces. It is unclear what type of liquid is inside, but is likely fuel oil." The 'Question Signed By' field contains 'Dilip Verghese'. The 'Date' field is set to 'Sep 17, 2012' and the 'Required Date' field is set to 'Sep 24, 2012'. The 'Question Distribution' section has an 'Add' button and a 'Copy Distribution to Answer' button. Below these buttons is a table with columns for 'Distributed To', 'Contact', 'Date', and 'Remarks'.

## C. Details Tab

New Request for Information Select an action...

General Review Status Question Answer **Details** Drawings Schedule SDA Data Issues Attachments

Spec Section

Contract <none selected> ... X

Reference ...

Change Management Number

Architect Number

Subcontractor Name <none selected> ...

Subcontractor Number

Save Cancel

- **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:

New Request for Information Select an action...

General Review Status Question Answer **Details** Drawings Schedule SDA Data Issues Attachments

Spec Section 025000 (Site Remediation)

Contract Construction (NT-0032-C02) ... X

Reference ...

Change Management Number

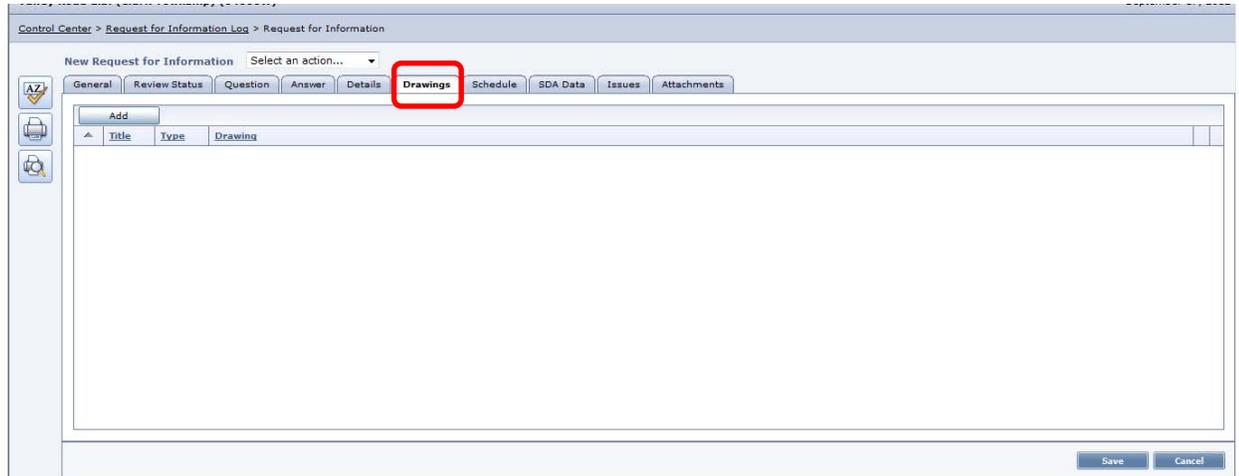
Architect Number 2125

Subcontractor Name <none selected> ...

Subcontractor Number

Save Cancel

## D. Drawings Tab



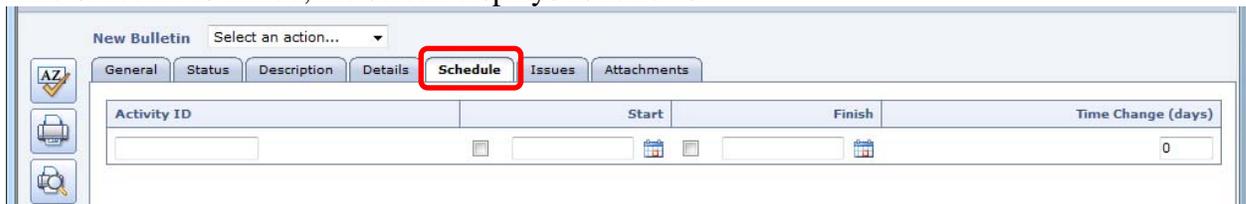
The screenshot shows the 'New Request for Information' form in a software application. The 'Drawings' tab is highlighted with a red box. The form has a navigation bar with tabs: General, Review Status, Question, Answer, Details, Drawings, Schedule, SDA Data, Issues, and Attachments. Below the tabs is a table with columns: Title, Type, and Drawing. The table is currently empty. There are 'Add', 'Save', and 'Cancel' buttons visible.

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:



The screenshot shows the 'New Bulletin' form in a software application. The 'Schedule' tab is highlighted with a red box. The form has a navigation bar with tabs: General, Status, Description, Details, Schedule, Issues, and Attachments. Below the tabs is a table with columns: Activity ID, Start, Finish, and Time Change (days). The table contains one row with the following data: Activity ID: A1186, Start: Nov 1, 2012, Finish: Sep 10, 2012, Time Change (days): 10. There are checkboxes next to the Start and Finish dates.

- **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

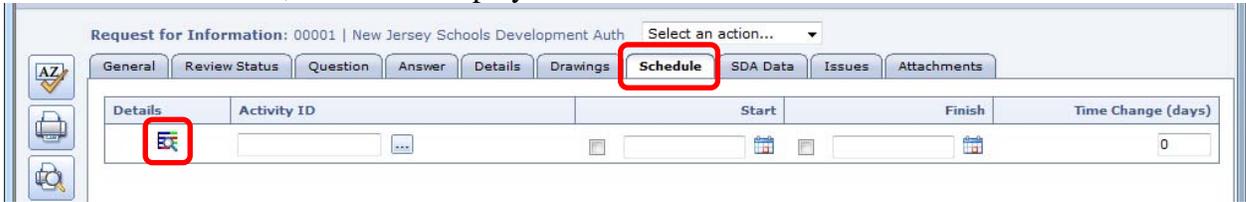
**Note:** You will not be updating the actual scheduled dates, this is only an indication of a possible change in the project schedule.

A completed section is shown:



The screenshot shows the 'New Bulletin' form in a software application. The 'Schedule' tab is highlighted with a red box. The form has a navigation bar with tabs: General, Status, Description, Details, Schedule, Issues, and Attachments. Below the tabs is a table with columns: Activity ID, Start, Finish, and Time Change (days). The table contains one row with the following data: Activity ID: A1186, Start: Nov 1, 2012, Finish: Sep 10, 2012, Time Change (days): 10. There are checkboxes next to the Start and Finish dates.

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.

Schedule		<a href="#">help</a>
Original Duration	420	
Remaining Duration	420	
% Complete	0.0%	
Start	Jun 21, 2013	
Finish	Sep 12, 2013	
Total Float	1470	

[Close](#)

- **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

The screenshot shows the 'Contract Summary' tab selected in the software interface. The 'Details' sub-tab is also selected. The summary information is as follows:

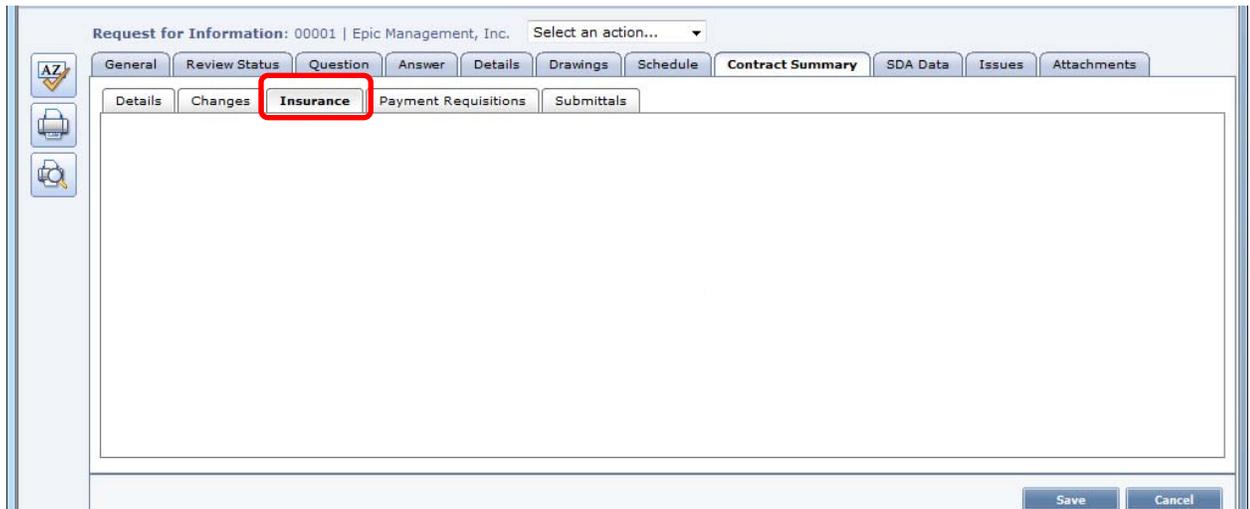
Original Contract/PO Sum	\$474,400.00	Original Completion Date
Approved Changes	\$16,334.00	
Revised Contract Sum	\$490,734.00	Revised Completion Date
Actual to Date	\$490,734.00	
Balance	\$0.00	

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

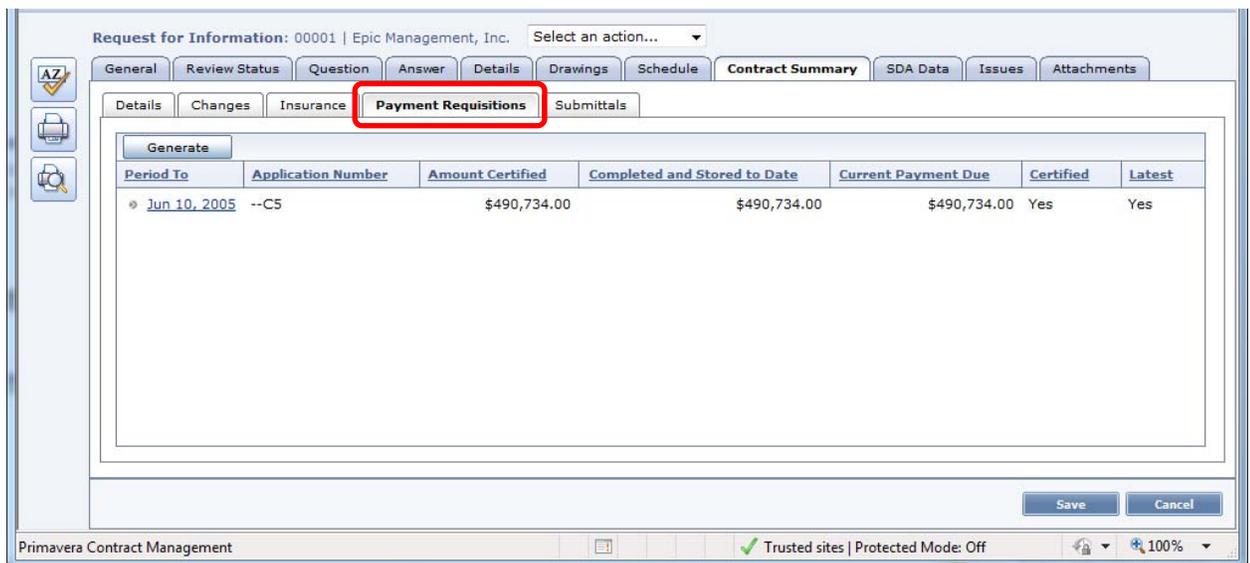
The screenshot shows the 'Changes' sub-tab selected in the software interface. It displays a table of change documents associated with the contract:

Title	Type	Change Management	Change Date	Approved Date	Approved Changes
EX-Cumul CO (4, Mar 14, 2005)	Change Order	Cumul CO (00003, Jun 28, 2007)	Mar 14, 2005	Jun 28, 2007	\$16,334.00
<b>Grid Totals:</b>					<b>\$16,334.00</b>

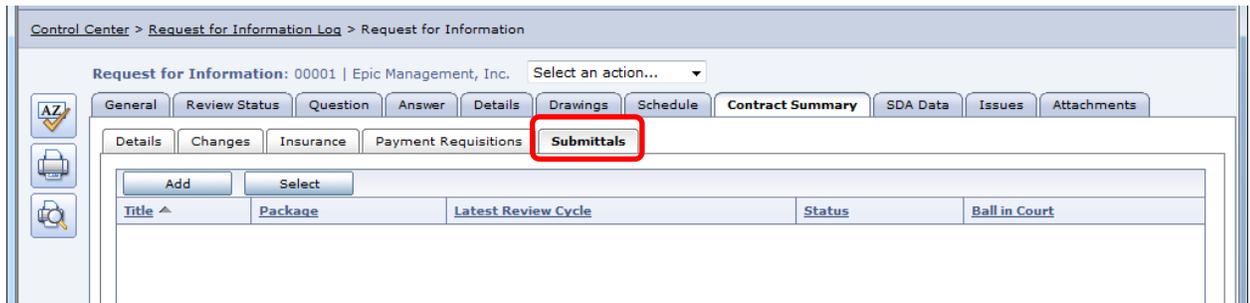
- **Insurance** –displays all insurance policies associated with the contract linked to this RFI (depending on your level of system access)



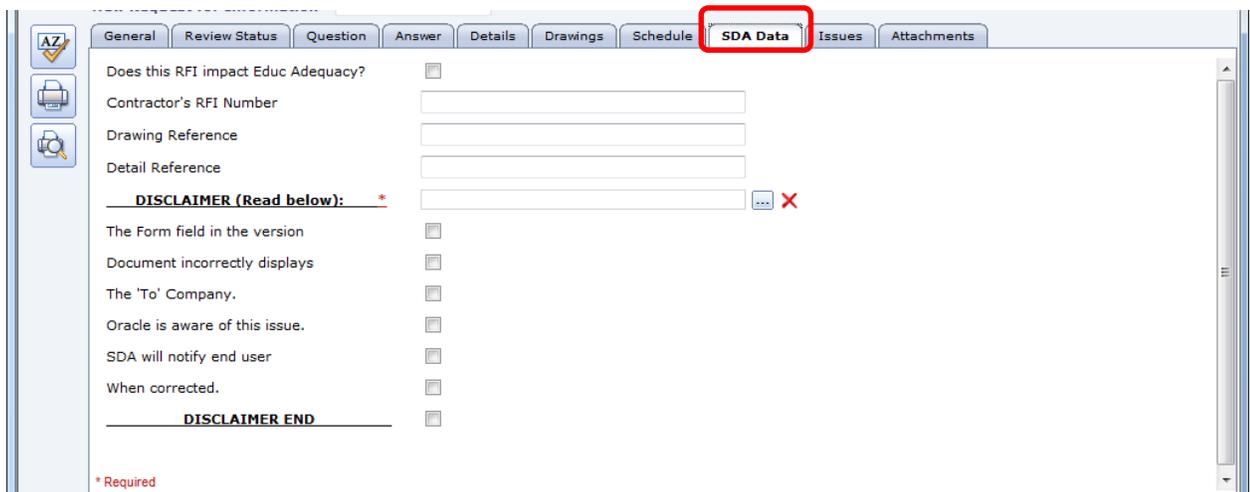
- **Payment Requisitions** – displays all payment requisitions associated with the contract linked to this RFI



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



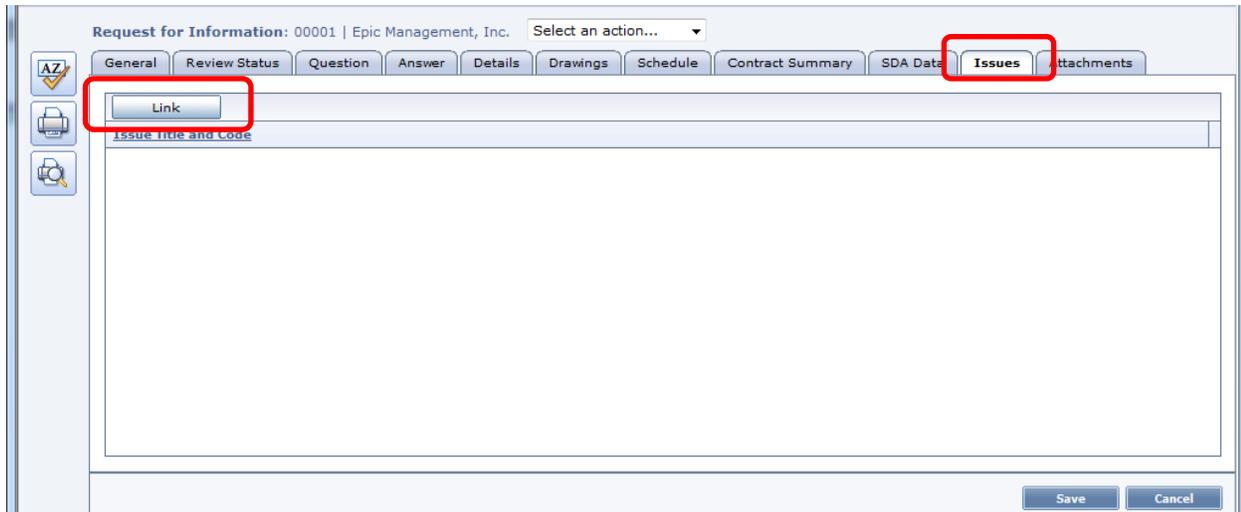
## G. SDA Data Tab



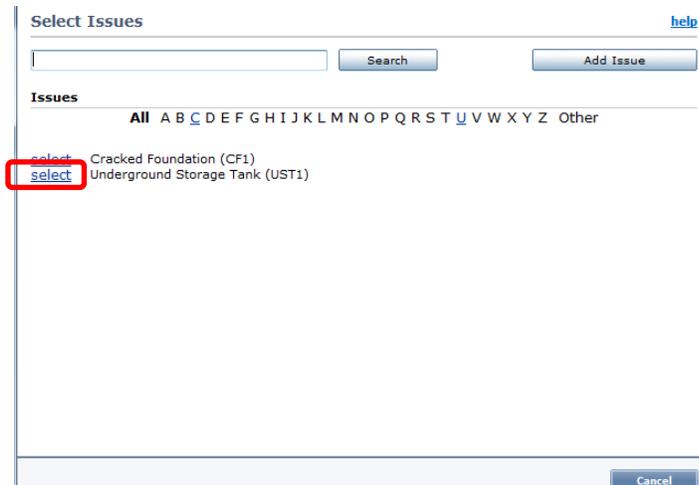
- **Does this RFI impact Educ Adequacy?** – this checkbox will indicate if this RFI will impact the educational adequacy of the school as determined by DOE’s “Facilities Efficiencies Standards” which includes grade levels, educational objectives, programs and services. Check the box if this answer is **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

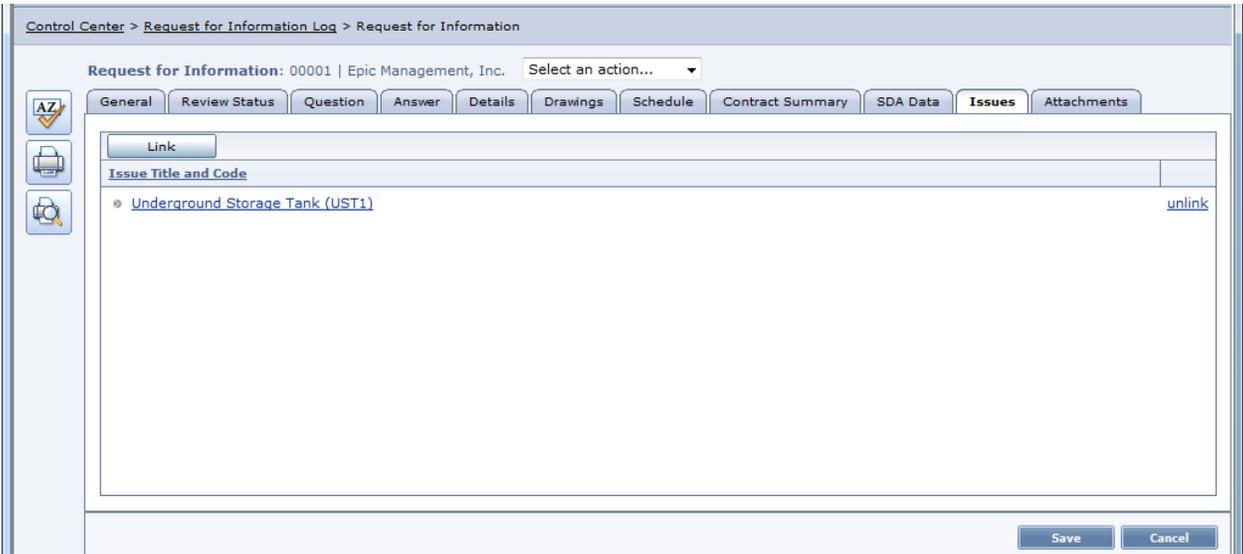
If this RFI relates to an Issue that was previously entered in the Issues log, it can be linked to this document. Click the **Link** button.



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.

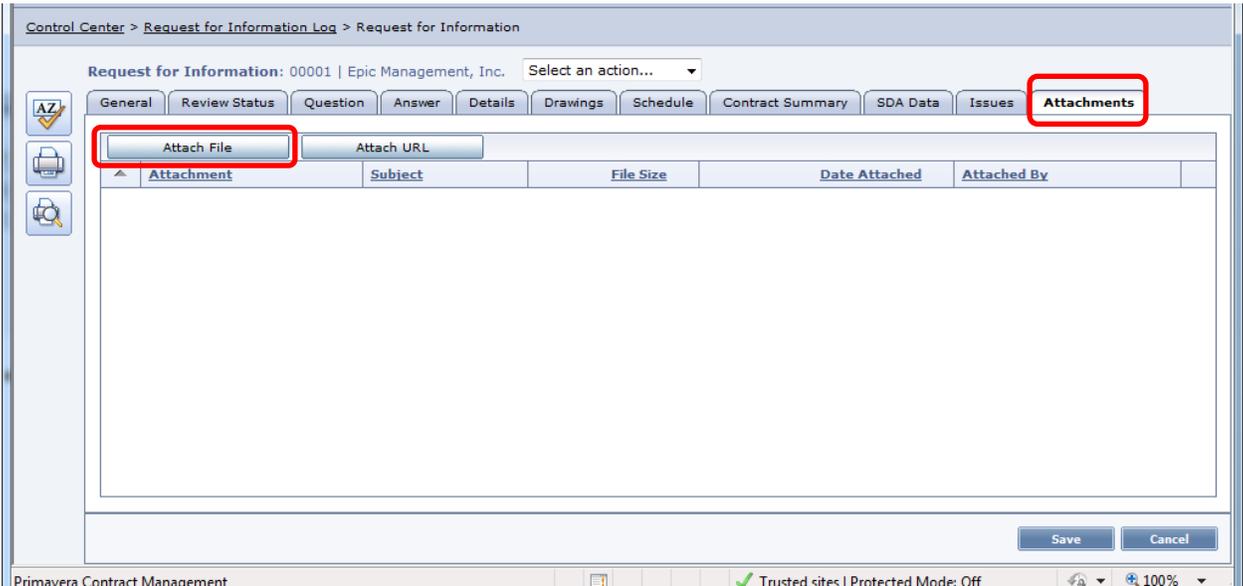


An example of a completed section is shown:

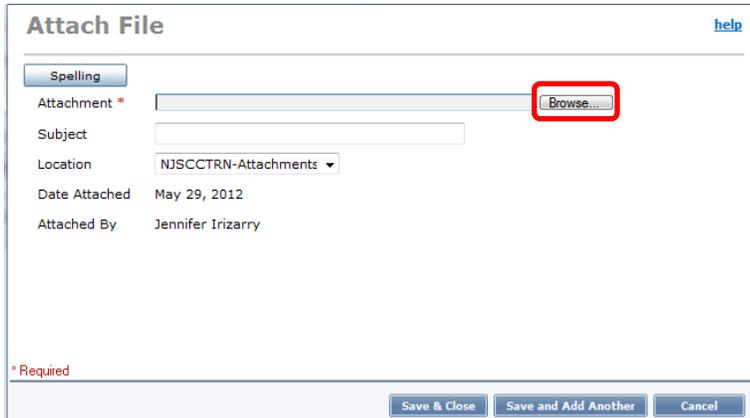


### I. Attachments Tab

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.

https://dev2pe.njsda.gov/ - Attach File - Windows Internet Explorer

**Attach File** [help](#)

Spelling

Attachment \* C:\Users\jirizarry\Desktop\report.pdf

Subject Report

Location NISCCTRN-Attachments

Date Attached Jun 19, 2012

Attached By Jennifer Irizarry

\* Required

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

Control Center > Request for Information Log > Request for Information

Request for Information: 00001 | Epic Management, Inc.

General Review Status Question Answer Details Drawings Schedule Contract Summary SDA Data Issues **Attachments**

Attach File Attach URL

Attachment	Subject	Location	File Size	Date Attached	Attached By	
report a.pdf	report	0850-040-04-000W	33 KB	Sep 17, 2012	Jennifer Irizarry	<a href="#">remove</a>

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

The screenshot shows a web-based form for a 'Request for Information'. The breadcrumb trail at the top reads 'Control Center > Request for Information Log > Request for Information'. The form title is 'Request for Information: 00001 | Epic Management, Inc.' with a dropdown menu for 'Select an action...'. The form has several tabs: 'General', 'Review Status', 'Question', 'Answer', 'Details', 'Drawings', 'Schedule', 'Contract Summary', 'SDA Data', 'Issues', and 'Attachments'. The 'General' tab is active. The form fields are as follows:

Type *	Request for Information
To *	Epic Management, Inc. Brian Farley
From *	DandK Construction Co, Inc Dilip Verghese
Number *	00001
Date	Sep 17, 2012
Title	Found underground storage tank

At the bottom left, there is a red asterisk and the text '\* Required'. At the bottom right, there are two buttons: 'Save' (highlighted with a red box) and 'Cancel'.

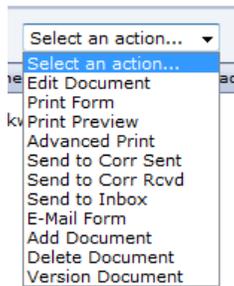
## II. Version Document

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.

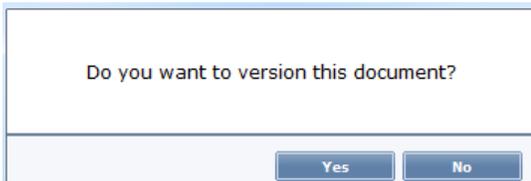
The Versions Tab will be used to track document versions. This tab only displays when you open the document in View mode, not in Edit mode. On the Versions tab, you can view and access previous versions of the selected document, identify who created the versions and when the versions were created.

### 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.

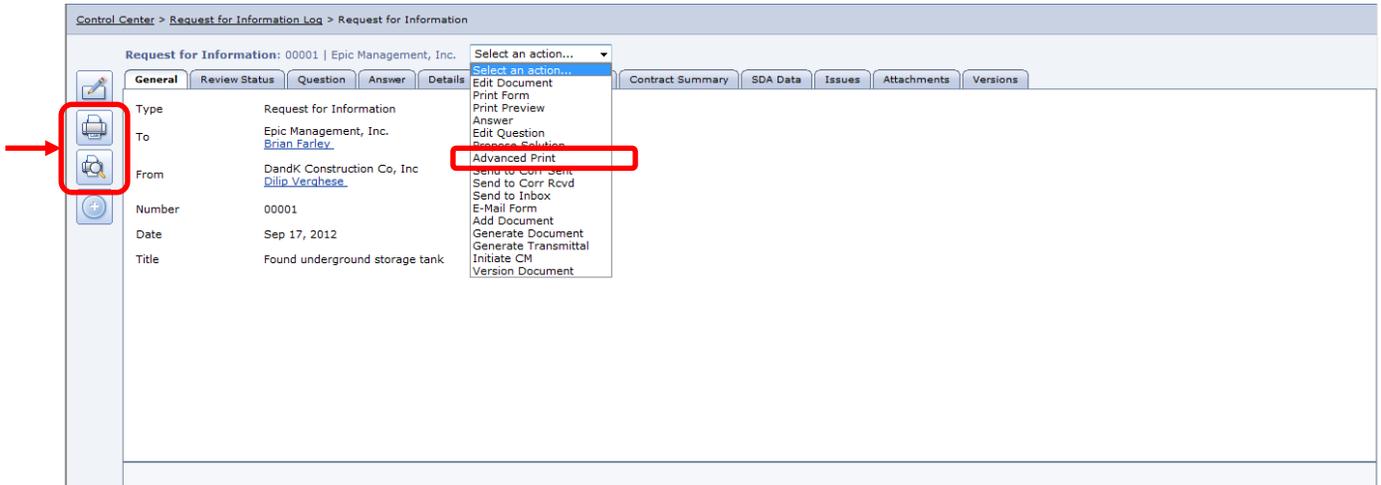


3. The Versions tab displays the document version you just created. As new document versions are created, they will be listed on this tab in reverse chronological order. Click the icon to open each version. When the version displays, it will show information available in the document when the version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

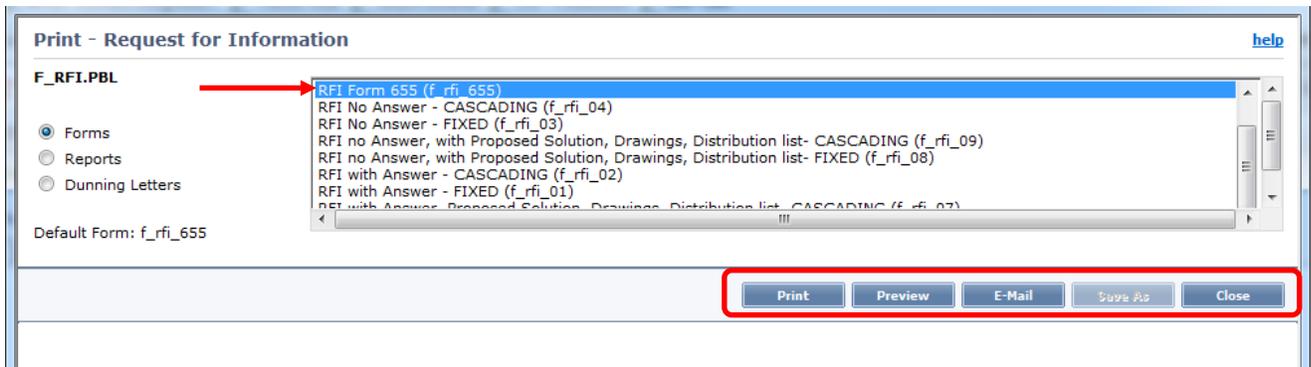


### III. Print an RFI

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.



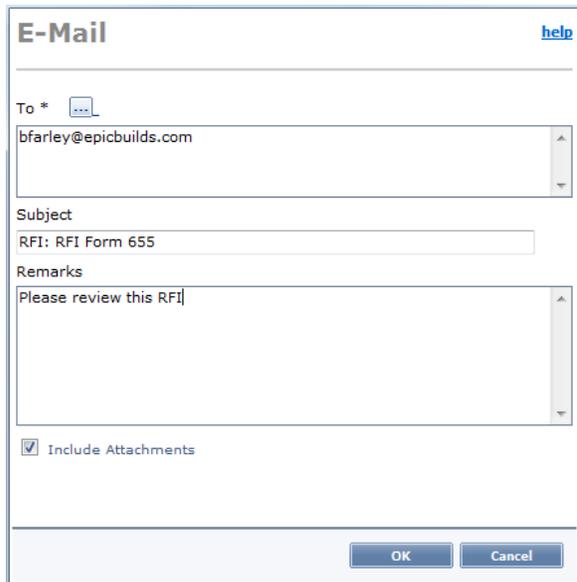
When the e-mail form dialog box displays, enter all desired contacts in the **To** field by either clicking the **select button** to choose their names from the contact list, or by manually entering their e-mail information. By default, the name selected in the From field on the document will automatically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

The screenshot shows the 'E-Mail' dialog box. The 'To' field contains 'bfarley@epicbuilds.com'. The 'Subject' field contains 'RFI: RFI Form 655'. The 'Remarks' field is empty. The 'Include Attachments' checkbox is unchecked. The 'OK' and 'Cancel' buttons are visible at the bottom.

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.



The screenshot shows an "E-Mail" dialog box with a "help" link in the top right corner. Below the title bar, there is a "To \*" field with a dropdown arrow, containing the email address "bfarley@epicbuilds.com". Below that is a "Subject" field containing the text "RFI: RFI Form 655". Underneath is a "Remarks" field with a text area containing "Please review this RFI". At the bottom left, there is a checked checkbox labeled "Include Attachments". At the bottom right, there are two buttons: "OK" and "Cancel".

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.

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## 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.

The screenshot shows the 'Request for Information: 00001 | Epic Management, Inc.' interface. The 'Answer' tab is selected and highlighted with a red box. The 'Answer' field contains the text: 'Please continue with your work. Your proposed solution is acceptable.' Below the text field, there are input fields for 'Answer Signed By' (Brian Farley), 'Date' (Sep 18, 2012), 'Responded Date' (Sep 18, 2012), 'Cost Impact' (No), 'Cost (\$)' (0.00), and 'Schedule Impact' (No).

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.

The screenshot shows the 'Request for Information: 00001 | Epic Management, Inc.' interface. The 'Answer Distribution' section is visible, and the 'Add' button is highlighted with a red box. Below the 'Add' button, there is a table with columns: 'Distributed To', 'Contact', 'Date', 'Required', 'Responded', 'Cost Impact', 'Schedule Impact', and 'Remarks'. The table is currently empty.

- 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.

Request for Information: 00001 | Epic Management, Inc. Select an action...

General **Review Status** Question Answer Details Drawings Schedule Contract Summary SDA Data Issues Attachments

Document Owner <none selected>

Ball in Court Epic Management, Inc.  
Brian Farley

Priority Normal

Status New Item

Closed? no

Closed by

Company New Jersey Schools Development Auth

Contact Jennifer Irizarry

Approved Date

Save

- 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.

Request for Information: 00001 | Epic Management, Inc. Select an action...

General **Review Status** Question Answer Details Drawings Schedule Contract Summary SDA Data Issues Attachments

Document Owner <none selected>

Ball in Court Epic Management, Inc.  
Brian Farley

Priority Normal

Status New Item

Closed? no

Closed by

Company DandK Construction Co, Inc

Contact Dilip Verghese

Approved Date Sep 18, 2012

Save

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

The screenshot shows the 'Request for Information' form for document 00001. The 'Status' dropdown menu is open, showing options: 'New Item', 'New Item as Noted', 'Approved as Noted', 'Approved as Noted Resubmit', 'Approved', 'Board Review / Approval', 'Cancelled', 'Change might initiated', 'Closed', 'Disapproved', and 'For Client Records Only'. The 'Closed' option is highlighted with a red box. A red arrow points to the 'Status' field.

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

The screenshot shows the 'Request for Information' form with the 'Status' field set to 'Closed'. The 'Close and Save' button is highlighted with a red box. The 'Closed by' section shows 'Epic Management, Inc.' as the company and 'William Costello' as the contact.

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

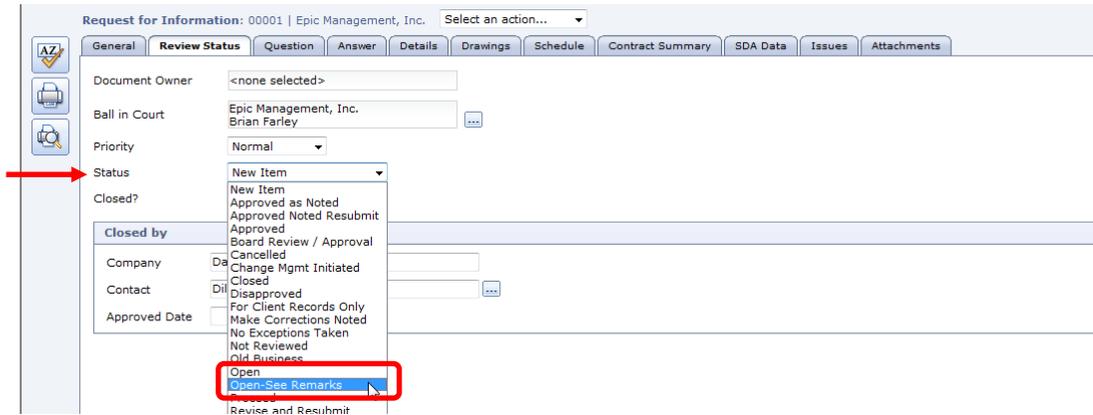
The screenshot shows the 'Request for Information' form with the 'Status' field set to 'Closed' and the 'Closed?' field set to 'yes'. A red arrow points to the 'Closed?' field. The 'Closed by' section shows 'Epic Management, Inc.' as the company, 'William Costello' as the name, and 'Oct 1, 2012' as the closed date.

**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.

Control Center > Request for Information Log > Request for Information

Request for Information: 00001 | Epic Management, Inc. Select an action...

General Review Status Question **Answer** Details Drawings Schedule Contract Summary SDA Data Issues Attachments

Answer

Please provide additional information for this RFI

Answer Signed By Brian Farley

Date Sep 18, 2012

Responded Date Sep 18, 2012

Cost Impact No

Cost (\$) 0.00

Schedule Impact No

Answer Distribution

Add Copy Distribution from Question

Distributed To	Contact	Date	Required	Responded	Cost Impact	Schedule Impact	Remarks
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Save Cancel

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

Control Center > Request for Information Log > Request for Information

Request for Information: 00001 | Epic Management, Inc. Select an action...

General Review Status Question **Answer** Details Drawings Schedule Contract Summary SDA Data Issues Attachments

Answer

Please provide additional information for this RFI

Answer Signed By Brian Farley

Date Sep 18, 2012

Responded Date Sep 18, 2012

Cost Impact No

Cost (\$) 0.00

Schedule Impact No

Answer Distribution

Add Copy Distribution from Question

Distributed To	Contact	Date	Required	Responded	Cost Impact	Schedule Impact	Remarks
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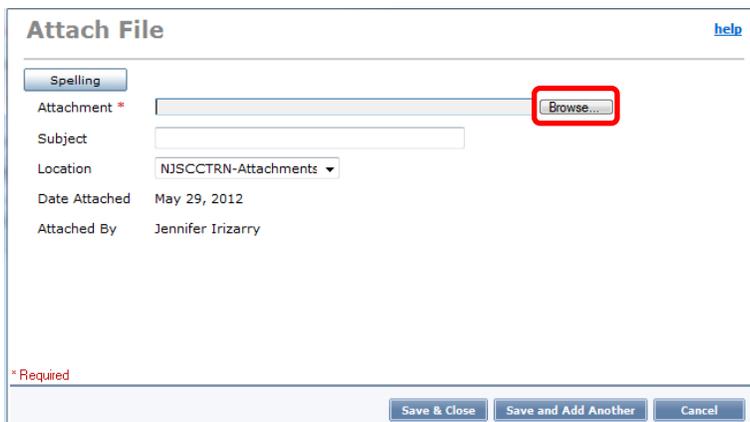
Save Cancel

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.

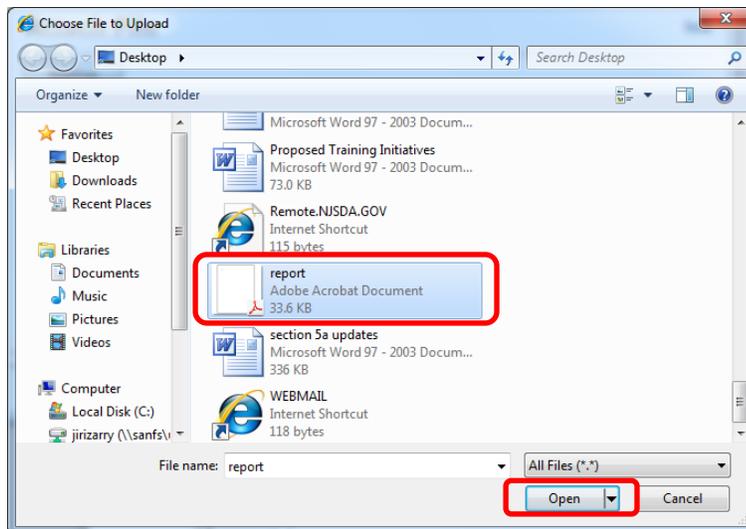
To attach supporting documentation, click the Attachments tab and click the **Attach File** button.



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.

https://dev2pe.njsda.gov/ - Attach File - Windows Internet Explorer

**Attach File** [help](#)

Spelling

Attachment \* C:\Users\jirizarry\Desktop\report.pdf [Browse...](#)

Subject Report

Location NISCCTRN-Attachments

Date Attached Jun 19, 2012

Attached By Jennifer Irizarry

\* Required

[Save & Close](#) [Save and Add Another](#) [Cancel](#)

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

Control Center > Request for Information Log > Request for Information

Request for Information: 00001 | Epic Management, Inc. [Select an action...](#)

[AZ](#) [General](#) [Review Status](#) [Question](#) [Answer](#) [Details](#) [Drawings](#) [Schedule](#) [Contract Summary](#) [SDA Data](#) [Issues](#) **Attachments**

[Attach File](#) [Attach URL](#)

Attachment	Subject	Location	File Size	Date Attached	Attached By	
<a href="#">report a.pdf</a>	<a href="#">report</a>	0850-040-04-000W	33 KB	Sep 17, 2012	Jennifer Irizarry	<a href="#">remove</a>

[Save](#) [Cancel](#)

- 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.

Request for Information: 00001 | Epic Management, Inc. Select an action...

General Review Status Question **Answer** Details Drawings Schedule Contract Summary SDA Data Issues Attachments

**Answer**

the attached documentation should provide the necessary backup

Please provide additional information for this RFI

Answer Signed By Brian Farley

Date Sep 20, 2012

Responded Date

Cost Impact No

Cost (\$) 0.00

Schedule Impact No

Save Cancel

Primavera Contract Management Trusted sites | Protected Mode: Off 100%

- Click the **Review Status** tab and set the Ball-in-Court to the GC by clicking the Select button and choosing the GC's 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.

Request for Information: 00001 | Epic Management, Inc. Select an action...

General **Review Status** Question Answer Details Drawings Schedule Contract Summary SDA Data Issues Attachments

Document Owner <none selected>

Ball in Court DandK Construction Co, Inc  
Dilip Verghese

Priority Normal

Status Open-See Remarks

Closed? no

**Closed by**

Company DandK Construction Co, Inc

Contact Dilip Verghese

Approved Date

Save Cancel

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**.

Request for Information: 00001 | Epic Management, Inc. Select an action...

General **Review Status** Question Answer Details Drawings Schedule Contract Summary SDA Data Issues Attachments

Document Owner: <none selected>

Ball in Court: DandK Construction Co, Inc  
Dilip Verghese

Priority: Normal

Status: Open-See Remarks

Closed?: New Item  
Approved as Noted  
Approved Noted Resubmit  
Approved  
Board Review / Approval

Closed by:

Company: **Change Mgmt Initiated**

Contact: Closed  
Disapproved  
For Client Records Only

Approved Date: Make Corrections Noted

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.

Request for Information: 00001 | Epic Management, Inc. Select an action...

General **Review Status** Question Answer Details Drawings Schedule Contract Summary SDA Data Issues Attachments

Document Owner: <none selected>

Ball in Court: Tetra Tech Engineers, Architects and  
David L Elwyn

Priority: Normal

Status: **Change Mgmt Initiated**

Closed?: no

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.

Request for Information: 00001 | Epic Management, Inc. Select an action...

General Review Status Question **Answer** Details Drawings Schedule Contract Summary SDA Data Issues Attachments

**Answer**

change management will be initiated for this change

Answer Signed By Brian Farley

Date Sep 20, 2012

Responded Date

Cost Impact No

Cost (\$) 0.00

Schedule Impact No

Save Cancel

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).