

## **RFIs Quick Reference Guide**

June 2018



Prepared for the Mayo Clinic Enterprise Kahua Deployment

### RFIs

#### **TERMS IN THIS SECTION**

**Requestor** – the person initiating the RFI. Other industry or relative terms: Author or Contractor (frequently the requestor of an RFI)

**Official Responder** – the person responsible for the final response to the RFI. The Official responder is the person and firm responsible to provide an answer to RFIs on the project. Mayo Clinic will default the Official Responder at project set up.

Other industry or relative terms: Primary Responder.

**Consultant and Mayo Responder(s)** –Will be solicited by the Official Responder as needed to provide additional information to the Official Responder. Only the Official Responder can have solicited them. The Consultant and the Mayo responder(s) can be defaulted at project set up. The Submitter cannot choose the Consultant and the Mayo Responder(s). Consultant and Mayo Responder(s) comments will not be seen by the Requestor.

Other terms: Secondary Responder(s).

#### **OVERVIEW OF THE RFI PROCESS**

Kahua allows the project team to collaborate on Requests for Information (RFIs) within a project. The RFI application allows a Requestor to initiate an RFI, route it through an Official Responder and optional Secondary Responders, and maintains a log of all RFIs in the project. The RFI application may be shared with external parties to collaborate across several parties to review and respond accordingly. This is the high level process:

Step 1: The Requestor creates an RFI and sends it to the Official Responder who receives a notification and a task.

Step 2: The Official Responder provides a response to the Requestor and may or may not consult with Secondary Responders while preparing the response. The Requestor receives a message indicating the Official Reponder has replied.

Step 3: The Requestor, upon reading the response, can close the RFI or send it back to the Official Responder for additional information or clarification. If the RFI is sent back, steps 2 and 3 repeat until the Requestor closes the RFI.

The diagram below shows the RFI process which includes the optional inclusion of the workflow between the Official Responder and Secondary (other) Responders that may take place before the Official Responder replies to the Requestor of the RFI.



## STEPS TO CREATE AN RFI

- 1. As the Requestor of the RFI, navigate to the appropriate project for the RFI you are creating. Verify that you are in the right project by looking at the project name in the top left of your screen.
- 2. Access the RFIs app from the App Launcher under the Document Management section.
- 3. In the dropdown list above the Log, select Construction shared by Mayo Clinic Enterprise.
- 4. Click New to create a new RFI.

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Construction V Shared by Mayo	
NEW REPORTS MORE -	
View: Default 👻	Search All 🔹 🔍
No. Subject Status Official Responder Due Date Responsible References	0 Item(s)

- 5. Fill out the RFI form noting the following:
  - a. Required fields are marked with an orange asterisk
  - b. The Official Responder auto populates based on how the project was set up
  - c. Provide any other information that will be helpful for the Official responder to provide a complete and detailed response.
  - d. Attach any reference documents at the bottom of the form, if applicable.

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		INC
Date	* 6/22/2018 15	
Subject	* my subject	
Status	Open	
Author	Paul Newman - Newman Construction ×	
Location	The location	
Reason	Insufficient Information	
Cost Effect	Unknown	
Time Effect	Unknown 🔹	
Sheet Detail	THE SHEET DETAIL	
Question	* The specs call for #7 rebar but the drawings show #5. Which should we use?	
Proposed Solutio	m* We believe it should be #5	

6. Use the options on the Save menu at any time during editing choosing from these options:

SAVE saves the RFI that you are editing while allowing you to continue editing

**SAVE/COPY** saves and closes the current RFI and opens a new one with the same values you entered into the first one; the first RFI has not yet been sent through workflow

**SAVE/CLOSE** saves the RFI you are editing and closes the RFI pane on the right; the RFI has not yet been sent through workflow



The Save options are useful when you aren't yet ready to send the current RFI into workflow.

- 7. When you have finished editing the RFI, click **Send to Official Responders**. This will save the RFI and send the RFI into workflow which will trigger these actions:
  - a. The RFI is sent to the Official Responder which results in a new message and new task in Kahua. The Official Responder also receives an email message about the RFI.
  - b. The RFI is sent by the Official Responder and to any Mayo or Consultant Responders (if defaulted). Other responders should get the message when defaulted by Mayo at the project configuration, or when the Official responder decides to solicit additional information. This should not be available for the Requestor.

Official Responder	Rita Hayworth - Hayworth Design ×
Mayo Responders	
Consultant Responders	
сс	
Due Date *	6/24/2018
Solicited Responder	
	ADD KAHUA DOC EDIT MARKUP REMOVE DOWNLOAD ADD COMPOSITE
TYPE DESCRIPTION	CONTRIBUTOR DATE MARKUP? INCLUDE ON SEND INCLUDE MARKUP ON SEND I
Send to Official Responder	Save / Close 🔻

The RFI Create screen closes leaving the RFI log on the screen. The newly created RFI is listed in the log.

Note:

- a. The Status column shows the new RFI is "Open"
- b. For an "Open" RFI the Responsible column indicates with whom the RFI is under review

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No.	Subject	Status	Official Responder	Due Date	Responsible	Refere
0024	Rebar question	Open	Rita Hayworth - Hayworth Design	4/20/2018	Rita Hayworth - Hayworth Design	
0023	another test from Yann	Responded	Rita Hayworth - Hayworth Design	4/14/2018	Paul Newman - Newman Construction	
0022	nouveau test	Closed	Rita Hayworth - Hayworth Design	4/19/2018		
0021	Testing	Open	Kailee Trum - Kahua	4/13/2018	Kailee Trum - Kahua	

8. The log view can be customized by clicking the **EX** icon on the top left of the RFI log. See the Basic Navigation Quick Reference Guide for more information.

#### SHARING THE RFI APPLICATION WITH AN EXTERNAL PARTY

Note: this section has instruction for Mayo Users with the right permission. These steps do not apply to the Business Partners.

To collaborate with their external parties, Mayo Clinic will send an invitation to them to share the Mayo RFIs application. Once shared, the Business Partners will be able to send RFIs to the Mayo Clinic team.

To share the RFIs application:

1. In the RFIs application, select MORE, a drop-down menu appears, select SHARING

Apps Browse Tasks Messages RFs Getting Started	@ @ ×
Construction	
NEW REPORTS MORE	
View. De EXPORT	Search All 🔹 🔍 🖨
Number Subjection Official Responder Due Date Responsible References	

2. Select **ADD** to add an external party

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Construction 🗸	
ADD EOIT END SHARE COMPANY PERMISSION LEVEL ROLE(S) STATUS HAS FILTER ALLOW COPY START DATE END DATE	36

3. A new window displays to the right.

New Share		
Project:	SP physical reeducation room	
Application:	RFIs •	
List \ Folder:	Construction •	
Share With:	Company      Group	
Company:		
Permission Level:	<b></b>	
Send Invite To:	<b></b>	
Allow copy		
Filters:	•	

Enter the appropriate information for each field.

Project- field auto populated

Application- field is auto populated with RFI. Do not change this.

List \ Folder- choose between Construction and Pre-Construction

**Share with**- the user will be able to choose between **Company** or **Group**. The fields remaining on the form change depending on whether Company or Group is selected.

When the user chooses Company, specific fields will appear:

New Share		
Project:	SP physical reeducation room	
Application:	RFIs •	
List \ Folder:	Construction	
Share With:	●Company ○Group	
Company:	Newman Construction ×	
Permission Level:	Contractor •	
	ROLES: Contributor	
Send Invite To:	Paul Newman - Newman Construction	

**Company** – Select the desired company. Kahua will display the company that the users added to the Contact Application. If the Company doesn't appear, it must be added first to the Contact Application in the Company tab.

**Permission Level** - Select the buinsess role of the person who will recieve the share request. This selection determines the roles for that person in the RFI workflow. For example, when Contractor is selected, this note displays to indicate the RFI workflow roles for a Contractor:

Permission Level:	Contractor	•
	ROLES: Contributor	

Roles have been set by the Mayo Clinic and give specific permissions to the external party users.

In this case, the Contractor permission level of **Contributor** will allow the external party user to:

#### Add, edit, export, open the application, process and view.

**Send invite To-** Select the external party user to whom the invitation to share will be send. Kahua will display the users from the company field selected above.

When the user chooses Group, specific fields will appear:

New Share	
Project:	SP physical reeducation room
Application:	RFIs •
List \ Folder:	Construction •
Share With:	Ocompany OGroup
Permission Level:	Contractor
	ROLES: Contributor
Note: Each company nee	eds to approve sharing to view the shared item. You can send invites to one or more individuals.:
Send Invite To:	
Name Compar	ny Company Status Invitation Status
Paul Newman Newmar	a Construction Active Invited

**Permission Level** – Using the drop down list, select the buinsess role of the group that will recieve the share request. A list of users with their company, company status and invitation status will be displayed below the **Send to Invite To**. The user will be able to select each users/companies to whom the invitation to share will be sent. The share request will be sent only to people with this symbol **I** next to the name.

**Allow copy**- this option allow the external parties to keep a copy of the record shared with the Mayo Clinic.

**Filters**- allows the user to set a filter to limit what the external party will see in the log. The filter options are quite flexible as this example shows:

Filters:	Due Date          After         7/2/2018         15         1           OAnd         Or	<b>K</b>
	Reason   Is Not Empty  And Or	*
	<b>~</b>	

4. Once all the fields filled, select **Send Invitation** to send the invitation to share to the external parties.

# ACCEPTING A SHARE RFI APP FROM MAYO ENTERPRISE AS AN EXTERNAL PARTY

Note: this section has instructions for Business Partners. These steps do not apply to Mayo users.

To collaborate, Mayo Clinic will share their RFI application with their Business Partners. These are the steps the Business Partner executes when accepting a share:

- 1. The Business Partner receives a sharing invitation in his Tasks.
- 2. Click on the Tasks icon to load all tasks into the List View window.
- 3. Click on the Kahua Sharing Invitation task to open the Detail View of that task.

Note: the Business Partner can decide to keep the project name as Mayo Enterprise named it or to create a new one. The recommendation is to keep the project's name as is.

4. Click on Accept to accept the shared invitation.

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Active	* Sharing Invite - Mayo Beta RFis Paul,
Image: Property in the system         SUBJECT         Date           Yann Bouzeranid         Kabuas Sharing Invitation         4/2           Yann MeyoAdmin         (Submission Construction) - Please submit a contract amendment for Training Project #1         4/2           2 Item(s)         2 Item(s)         1	<text><text><text><text><text><text><text><text></text></text></text></text></text></text></text></text>



### **OFFICIAL RESPONDER SENDS THE RFI TO OTHER RESPONDERS**

The Requestor of the RFI sends the RFI to the Official Responder who will receive a task and message alert within Kahua and an email notification. The Official Responder can add additional responders if needed such as a Mayo Responder and a Consultant Responder.

Note that the Mayo Responder and the Consultant Responder might be defaulted when the project is created. In this case they will be populated automatically in the appropriate fields.

1. As the Official Responder, access the RFI task notification from the link in email or sign into Kahua and click on your task icon then select the RFI task.



2. Add additional Mayo and Consultant Responders if necessary (Note: Responders must be Kahua users). When the Official Responder adds a Mayo or Consultant Responder, they may add one or multiple additional users to request input. Please note that the Official Responder will always submit the final response. Responses from other Mayo or Consultant Responders will be maintained only in the task dialogue but will not be shared on the RFI log.

3. Click Send to Other Responders to send a task to the Mayo Responder(s) and the Consultant responder(s) listed in the task detail view.

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■ • Vee Default •			۵ 🖨	Detalla Rasponas Sal	brange das		
FROM	SUBJECT	DATE ASSIGNED DUE DATE	APP PROJECT	+ DETAILS			
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Paul Newman RF1 0002 submitte	ed on Mayo AZ Training Training Project #11Condition	3/20/2018 3/27/2018	RFIs Training Project	No.	0015		
	2 herri(x)			Subject	Rubar quasilon		
				Status	Open		
				Author	Paul Nevernary - Nevernan Construction		
				CSI Code	CBICODE		
				Location	LOCATION		
				Cost Effect	Unknown		
				Time Effect	Unknown		
				Sheet Detail	SHEET DETAIL		
				Question	The spoce-call for #7 robor but the drawings show #5. Whit	th should we use?	
				Proposed Solution	We believe is should be #5		
				- RESPONSE			
				Official Responder	Rite Heyworth - Hayworth Design		
				Mayo Responders	Jamen MayoProjectDesigner - Maye A2 Training 10		
				Consultant Response	Bern Cary Grant - Nayworth Design 10		
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				Due Date	3/26/2018		
				Mayo Responses			
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You last topped in Tuesday, March 30, 27	118 al 2 31 PMI eta Kalsuk WEF		=				💱 katu

## SENDING AN RFI AS A NON-KAHUA USER

In the rare case that there is a non-Kahua user, the RFI will have to be sent by email to a designated Mayo Clinic user for that specific project.

#### **RESPONDING AS A SECONDARY RESPONDER**

Mayo Responders and Consultant Responders are considered Secondary Responders. These users can submit responses to the Official Responder to assist in formulation of the final response. All the Secondary Responder responses are reviewed by the Official Responder. A Mayo Responder has several available options. A Consultant Responder has less available options.

To see the task and to see available options and take action, a Secondary Responder may:

- 1. Access the task notification from the email notification or
- 2. Sign into Kahua and click on the task icon to access the individual task.

#### **MAYO RESPONDER OPTIONS**

Mayo Responders can respond, send updates, defer and solicit other responders for help if needed by choosing one of the response options which are further explained below.

Send Update Solicit Other Responders Submit Response Defer	Response			
	Send Update	Solicit Other Responders	Submit Response	Defer

**Send Update**: This option sends a response to the Official Responder without closing the Mayo Responder's task.

Solicit Other Responders: This option allows a Mayo Responder to solicit another Responder.

**Submit Response**: This option allows a Mayo Responder to send a response to the Official Responder and will close the Mayo Responder's task.

**Defer**: This option allows the Mayo Responder to decline to answer the RFI. The Official Responder is notified of this and the Mayo Responder's task is closed. A a timestamped note indicating the Mayo Responder's deferral is added to the other Responder's tasks.

#### **CONSULTANT RESPONDER OPTIONS**

Consultant Responders have two possible actions: Send Update and Submit Response. The behavior is the same as for the Mayo Responder and is described above.

Send Update	Submit Response

### SUBMITTING A RESPONSE AS A SECONDARY RESPONDER

When you submit a response to the Official Responder, other users collaborating on this RFI will see the responses on their task view as you will see their responses. The Official Responder will also see the submitted responses on their task and can review all of them to assist in preparing an official response to the Requestor. At any time, the Official Responder may submit an official response, at which point the other outstanding tasks will be closed.

Upon submission of a response, the task is closed and will be removed from each person's Task list. To see a history of all completed tasks, navigate to the upper left corner of the Task application and click on the 'active' dropdown to toggle to 'Completed'.

Training Project #1	Search Kahua Q, Baon Bay A Talawa
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Note         Note         Note         Note           Note         Note         Note         Note         Note           Tools         Note         Note         Note         Note         Note           Tools         Note         Note         Note         Note         Note         Note           Tools         Note         Note <th>May Despinder Task View         Task           Statistic Requests Reflections         Task View         Task           Statistic Requests Reflections         May Despinder Task View         Task           Statistic Requests Reflections         May Despinder Task View         Task           Statistic Requests Reflections         May Despinder Task View         Task           Statistic Representation of the Official Requests         Week Provide Task         Task          </th>	May Despinder Task View         Task           Statistic Requests Reflections         Task View         Task           Statistic Requests Reflections         May Despinder Task View         Task           Statistic Requests Reflections         May Despinder Task View         Task           Statistic Requests Reflections         May Despinder Task View         Task           Statistic Representation of the Official Requests         Week Provide Task         Task
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The last legant in Tuesday, March 20, 2016 at 11 (d-49) on Auron MPP	H 8 (\$14)

# THE SOLICITED RESPONDER WORKFLOW (FOR MAYO RESPONDERS ONLY)

A Mayo Responder can invite others to review and comment on an RFI if additional insight is needed. These added contributors are called Solicited Responder(s). The sequence for solicited responses is as follows:

- 1. Mayo Responder sends a task to Solicited Responders
- 2. Solicited Responders act on the task
- 3. Mayo Responder receives and acts on the response(s) received then sends the RFI response back to the Official Responder

#### INITIATING A SOLICITED RESPONSE AS A MAYO RESPONDER

- 1. As a Mayo Responder, access the RFI task.
- 2. Enter names of Kahua user(s) into the **Solicited Responder** field. Multiple names may be entered.
- Enter instructions to the Solicited Responder in the Instructions to Solicited Responder field. These instructions will be sent with the task to the Solicited Responders(s) and will not be visible to anyone else.
- 4. Click Solicit Other Responders to initiate the task.

Mayo Responder Task View		Task			
Details Response References					
Mayo Responders	Jason MayoProjectDesigner - Mayo AZ Training				
Consultant Responders	Cary Grant - Hayworth Design				
cc					
Due Date	4/14/2018				
Mayo Responses					
Consultant Responses					
Solicited Responder	Brandon MayoFacilitiesOperations - Mayo AZ Training X				
Instructions To Solicited Responder	Could you take a look?				
Perpense		-1			
Response		- 11			
		- 11			
		- 11			
Responsible	Rita Hayworth - Hayworth Design				
* REFERENCES					
VIEW UPLOAD ADD KAHUA DOC EDIT MARKUP DOWNLOAD ADD COMPOSITE					
TYPE DESCRIPTION CONTRIBU	TORY DATE MARKUP? INCLUDE ON SEND INCLUDE MARKUP ON SEND IS CURRENT PREVIEW STATUS	сом			
Send Update Solicit Other Responde	lers Submit Response Defer				

#### **RESPONDING TO A REQUEST AS A SOLICITED RESPONDER**

As noted above, the Mayo Responder can add a Solicited Responder(s) if additional insight is needed.

A Solicited Responder acts on that request as follows:

- 1. The Solicited Responders will receive the task notification from an email or by logging into Kahua and reviewing the new Task.
- 2. The Solicited Responder will review the instructions and RFI detail that was sent in the task.
- 3. The Solicited Responder will write the response to the task in the Response field.
- 4. The Solicited Responder will select **Submit Response** to send the response back to the Mayo Responder.

Note that the Solicited Responder response will appear in the **Mayo Response** section on all responders' tasks. The Official Responder will be able to see the response as well on their task.

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Jason MayoProjectDesigner RFI 0023 subm	Clarification Comments History Proposed Solution We	believe is should be #5	
	✓ RESPONSE Official Responder	Rita Hayworth - Hayworth Design	
	Mayo Responders Consultant Responders	Jason MayoProjectDesigner - Mayo AZ Training Cary Grant - Hayworth Design	
	Due Date	4/14/2018	
	Mayo Responses Consultant Responses Solicited Responder	Brandon MayoFacilitiesOperations - Mayo AZ Training	
	Instructions To Solicited Responder	Jason MayoProjectDesigner - Mayo AZ Training - 4/13/2018 12:34 PM Could you take a look?	
	Response	it should be #5	
	Responsible	Rita Hayworth - Hayworth Design	
	REFERENCES	A DOC EDIT MARKUP DOWNLOAD ADD COMPOSITE	
	Send Update Submit Response		

## ACTING ON INFORMATION FROM A SOLICITED RESPONDER AS A MAYO RESPONDER

The Mayo Responder will receive notification to indicate there is a response from a Solicited Responder. The Mayo Responder takes these actions:

- 1. The Mayo Responder opens the existing task and reviews input from the Solicited Responders which appears in the **Mayo Responses** field.
- 2. The Mayo Responder may now type the response to the RFI in the "Response" field then click **Submit Response** to complete this task.

Apps Browse Tasks ! Messages	Getting Started	@ ×
Active 🗸		
NEW SHARE	Mayo Responder Task View	Task
FROM SUBJ Rita Hayworth RFI 0023 submitted o	Details Response References Official Kesponder Mayo Responders Consultant Responders CC Due Date	Rita Hayworth - Hayworth Design Jason MayoProjectDesigner - Mayo AZ Training Cary Grant - Hayworth Design 4/14/2018
	Mayo Responses Consultant Responses Solicited Responder Instructions To Solicited Responder	Brandon MayoFacilitiesOperations - Mayo AZ Training - 4/13/2018 12:52 PM Brandon MayoFacilitiesOperations - Mayo AZ Training X
	Response	We think it should be #5
	Responsible	Rita Hayworth - Hayworth Design
	- REFERENCES	
	DOC EDIT MARKUP DOWNLOAD ADD COMPOSITE	
	Send Update Solicit Other Respond	ers Submit Response Defer

Note: Mayo Responders may submit a response at any time or can await insight from the Solicited Responders before submitting a response to the Official Responder.

### **RESPONDING TO THE RFI AS THE OFFICIAL RESPONDER**

The Official Responder can respond to an RFI at any time. The Official Responder does not need to wait until all responses are received before submitting a final response. Only the response from the Primary Responder will be sent back as the official response and show on the RFI log.

As the Official Responder, to respond to an RFI:

- 1. Access the task notification from your email or log in to Kahua and click on your open tasks.
- 2. Select the RFI task that will be submitted.

Apps Browse Tasks Messages	Getting Started hua Network, the world's only	collaborative network for co	nstruction project ma	nagement.
Select one of the links below o star Please note you are currently a site	t configuring your Kahua site. (domain) administrator.			
Recent Tasks FROM SUBJECT Paul Newman RF1 0015 submitted on May Paul Newman RF1 0002 submitted on May	DUE DUE S282018 o AZ TrainingiTraini 32272018 You have 2 open task(s), View All	Recent Messages           FROM         SUBJECT           Paul Nerman         RF10015 submitted on Mays           Lora Flory         Please review the Pay Requ           Paul Nerman         RF10002 submitted on Mays           Jason MayoProje         Jason MayoProjectDesigner	RECEIVED betalApp Testing 3/27/2018 est from Newman 3/20/2018 3/20/2018 3/20/2018 3/20/2018 You have 24 message(s).	View All
Tasks by App	Open Tasks Overdue Due today Due in 1-7 days > 7 days No due date You have 2 open task(s). View All	Recent Projects 0001 Hayworth DesigntTraining Project #1		Browse All
Take A Tour Learn how to navigate and use Kahua's unique features.	Get Productive Discover how to increase productivity using Kahua.	Complete Your Profile Be a team player by personalizing your information.	P Help Center Let us help you.	
Configure Your Site Get the most from Kahua by setting it up the way you need it.				
You last logged in Tuesday, March 20, 2018 at 2:	31 PM via Kahua WPF		=	

- 3. Review the responses from the secondary responders, including the Mayo Responder, the Consultant Responder and the Solicited Responder(s).
- 4. Enter the official response as appropriate. Recall that the official response will be sent back to the Requestor for review and display in the RFI log. The secondary responses will not be seen by the Requestor.

5. Click **Submit Response** when ready to submit the RFI to the Requestor.

Training Project #1	Search Kahus Q, Pa	a Hayworth V
HE A CONTRACTOR CONTRA		a ×
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NEW SHARE	Official Responder Task View	Task
≣ * Vew: Default →	Details Response References	
FROM SUBJECT DATE ASSIGNED DUE DATE APP PROJ	T Cost Effect Unknown	
Paul Neaman RFI 0015 submitted on Mayo Betal App Testing Projects/Kallee Trum Project/Construction 3/27/2018 3/28/2018 RFIs Kallee Tru	Pn Time Effect Unknown Sheet Detail SHEET DETAIL	
Paul Newman RFI 0002 submitted on Mayo AZ Training/Training Project #11Construction 3/20/2018 3/27/2018 RFIs Training P	Cuestion The specs call for #7 rebar but the drawings show #5. Which should we use?	
2 (INTT(6)	Proposed Solution We believe is should be #5	
	* RESPONSE	
	Official Responder Rita Hayworth - Hayworth Design	1
	Caracterization and and a second and a	
	Consultant Responders Cary Grant - Hayweeth Dinsign -X	
	Due Date 3/28/2018	_
	Mayo Responses Jason MayoProjectDesigner - Mayo AZ Training - 3/27/2018 12:11 PM I believe it should be #5, Please check with the structural engineer though.	1
	Carly Grant - Havaneth Davian - 327/2018 12:21 PM	
	Consumm Responses It should be #0, we will adjust the plans accordingly	
	Official Response Use #5 rebar. We will adjust the plans accordingly	_
	+ REFERENCES	
	E 1 VEW UPLOAD ADD KAMBADDOC EDIT MARKUP UPDATE RENOVE DOWNLOAD ADD COMPOSITE	
	TYPE DESCRIPTION CONTRIBUTOR DATE MARKUP? INCLUDE ON SEND INCLUDE MARKUP ON SEND IS CURRENT	PREVIEW S
	Save Sent To Other Responders Submit Response	
		Alle Labore

Notifications will be sent to the Contractor, secondary responders and contacts in the CC field as soon as the RFI is submitted.

## **CLOSING AN RFI AS THE REQUESTOR**

Once the RFI has been responded to, the Requestor will have an opportunity to review the response and close the RFI if the response is satisfactory. Otherwise, the Requestor is able send the RFI back for additional information. Once closed, the RFI cannot be edited and can only be unlocked by a Kahua Administrator.

- 1. Navigate to the appropriate project. Access the RFIs app from the App Launcher menu and under Document Management.
- 2. If you are the contractor or design professional, select the **Construction Shared by Mayo Clinic Enterprise** tab from the dropdown list.
- 3. Select the appropriate RFI in the log.

Apps Browne Tasks Messages RFIs Getting Started			© @ >	<
Construction V				
NEW REPORTS MORE V SEND EDIT VIEW HISTORY	SEND EDIT VIEW HISTORY		0	×
Search All  Q	RFI Preview		Preview	N
No. Subject Status Official Responder Due Date Responsible D001 my subject Responded Rita Hayworth - Hayworth Design 8/24/2018 Paul Newman - Newman Construct 1 tiem(s)	Details Response References	SP physical reeducation room 0001 6/21/2018 my subject Responded Paul Newman - Newman Construction THE LOCATION Insufficient Information Unknown THE SHEET DETAIL The specs call for #7 rebar but the drawings show #5, use?	Which should we	
	Close Request Clarific	ation		

4. If the RFI response is satisfactory, change the status to **Closed** (otherwise send it back to the responders with a request for additional information by clicking Request Clarification).

5. Click Close when done.



Once the RFI is closed, its status in the log will be indicated as **CLOSED**. Only a user from Mayo with an administrator permission will be able to unlock the RFI.

6. Click View to see the printable version of the RFI information.

Apps Browse Tasks Messages RFIs Getting Started		٥	ē ×
NEW REPORTS MORE ▼   SEND VIEW HISTORY       ■ ▼ View: Default ▼       Search All ▼       No.       Subject       Status       Official Responder       Due Date       Responsible       Reference:	SEND VIEW HISTORY RFI Preview		⊘ □ ¥ Preview
0001 my subject Closed Rita Hayworth - Hayworth Design 6/24/2018 1 Item(s)	Details Response References		
	Project Number Date	SP physical reeducation room 0001 6/21/2018	
	Subject Status Author	my subject Closed Paul Newman - Newman Construction	
	Location Reason	THE LOCATION	
	Time Effect Sheet Detail	Unknown Unknown THE SHEET DETAIL	
	Question Clarification Comment	The specs call for #7 rebar but the drawings show #5. Which should we use?	
	Clarification Comments History Proposed Solution	We believe it should be #5	

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