

MAYO CLINIC



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

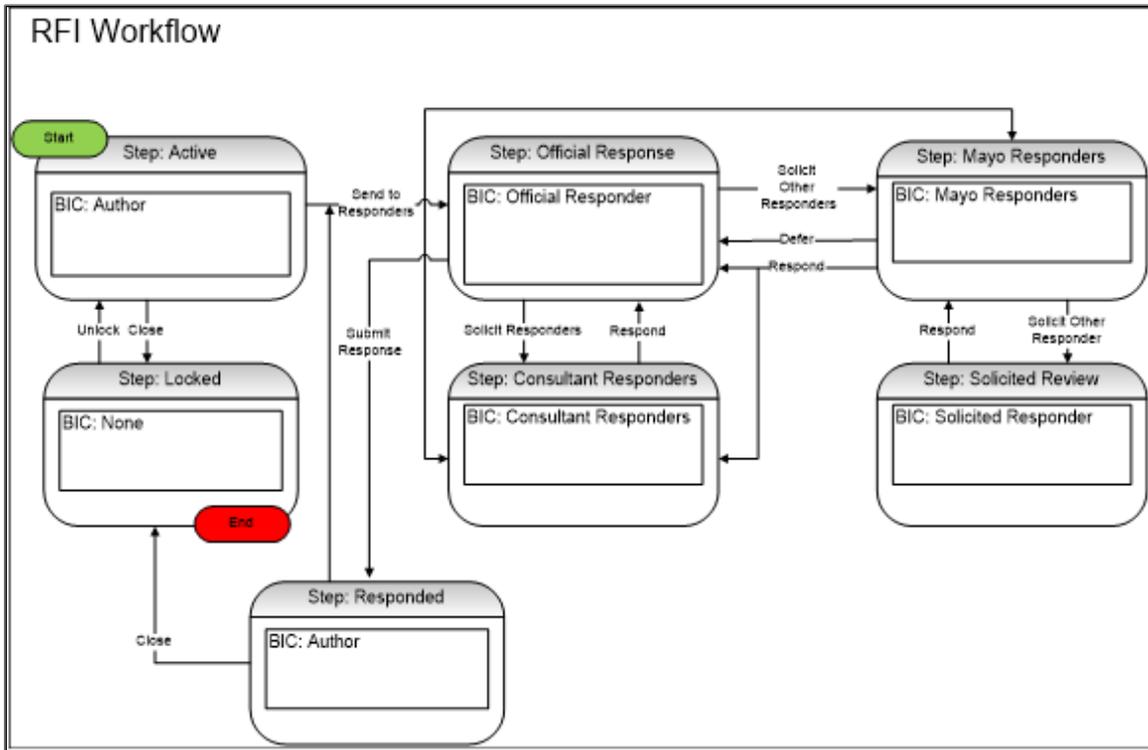
Kahua allows the project team to collaborate on Requests for Information (RFIs) within a project. The RFI application allows a Requestor to initiate an RFI, route it through an Official Responder and optional Secondary Responders, and maintains a log of all RFIs in the project. The RFI application may 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 Responder has replied.

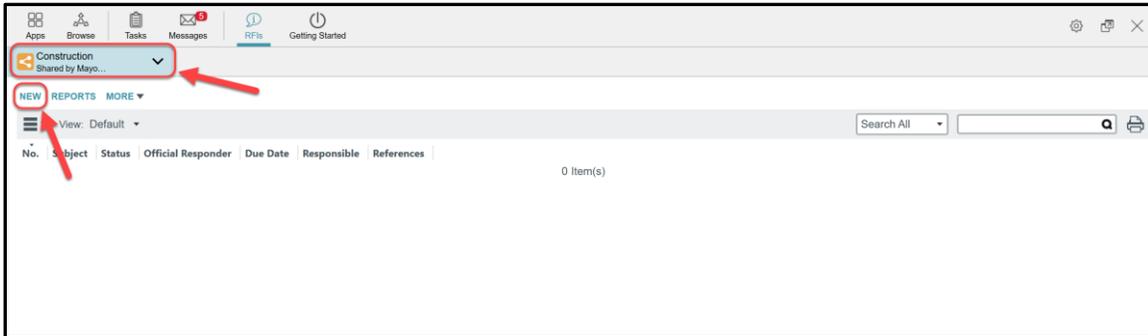
Step 3: The Requestor, upon reading the response, can close the RFI or send it back to the Official Responder for additional information or clarification. If the RFI is sent back, steps 2 and 3 repeat until the Requestor closes the RFI.

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.



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.

A screenshot of the 'NEW' RFI form. The form is titled 'NEW' and has a 'New' button in the top right corner. The form is divided into sections: 'Details', 'Response', and 'References'. The 'Details' section contains the following fields:

- Date: 6/22/2018 (with a calendar icon)
- Subject: my subject
- Status: Open
- Author: Paul Newman - Newman Construction (with a close button)
- Location: The location
- Reason: Insufficient Information (dropdown menu)
- Cost Effect: Unknown (dropdown menu)
- Time Effect: Unknown (dropdown menu)
- Sheet Detail: THE SHEET DETAIL
- Question: The specs call for #7 rebar but the drawings show #5. Which should we use?
- Proposed Solution: We believe it should be #5

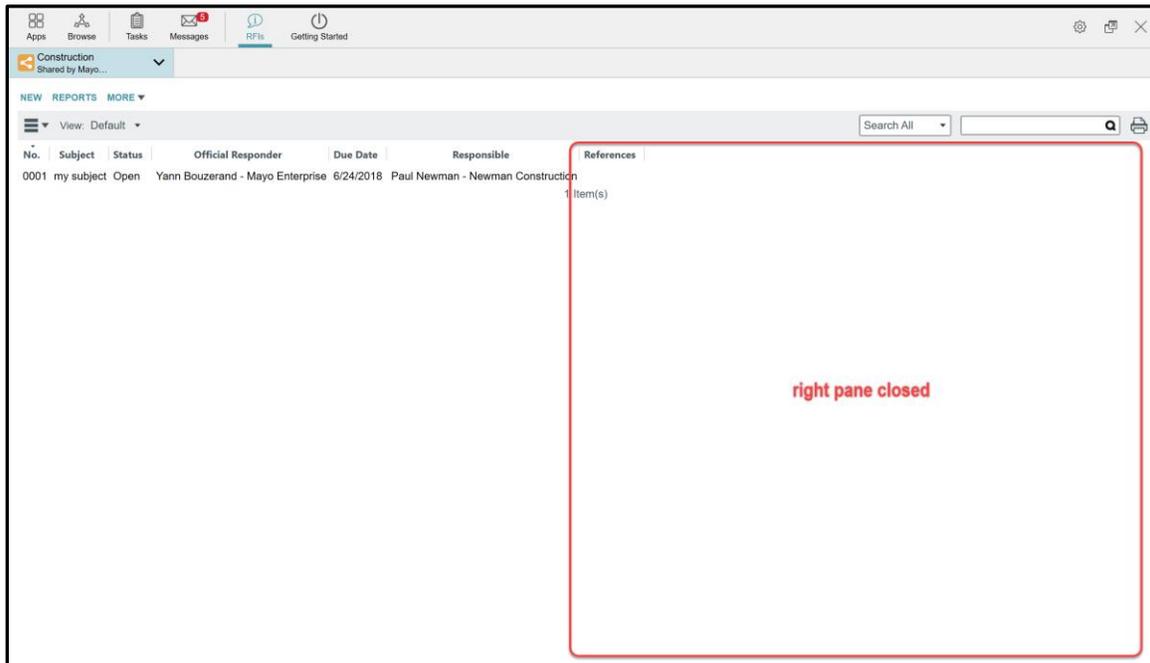
Required fields are marked with an orange asterisk.

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.

▼ RESPONSE

Official Responder

Mayo Responders

Consultant Responders

CC

Due Date * 6/24/2018

Solicited Responder

▼ REFERENCES

VIEW UPLOAD ADD KAHUA DOC EDIT MARKUP REMOVE DOWNLOAD ADD COMPOSITE

TYPE	DESCRIPTION	CONTRIBUTOR	DATE	MARKUP?	INCLUDE ON SEND	INCLUDE MARKUP ON SEND
<input type="button" value="Send to Official Responder"/> <input type="button" value="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

No.	Subject	Status	Official Responder	Due Date	Responsible
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  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:

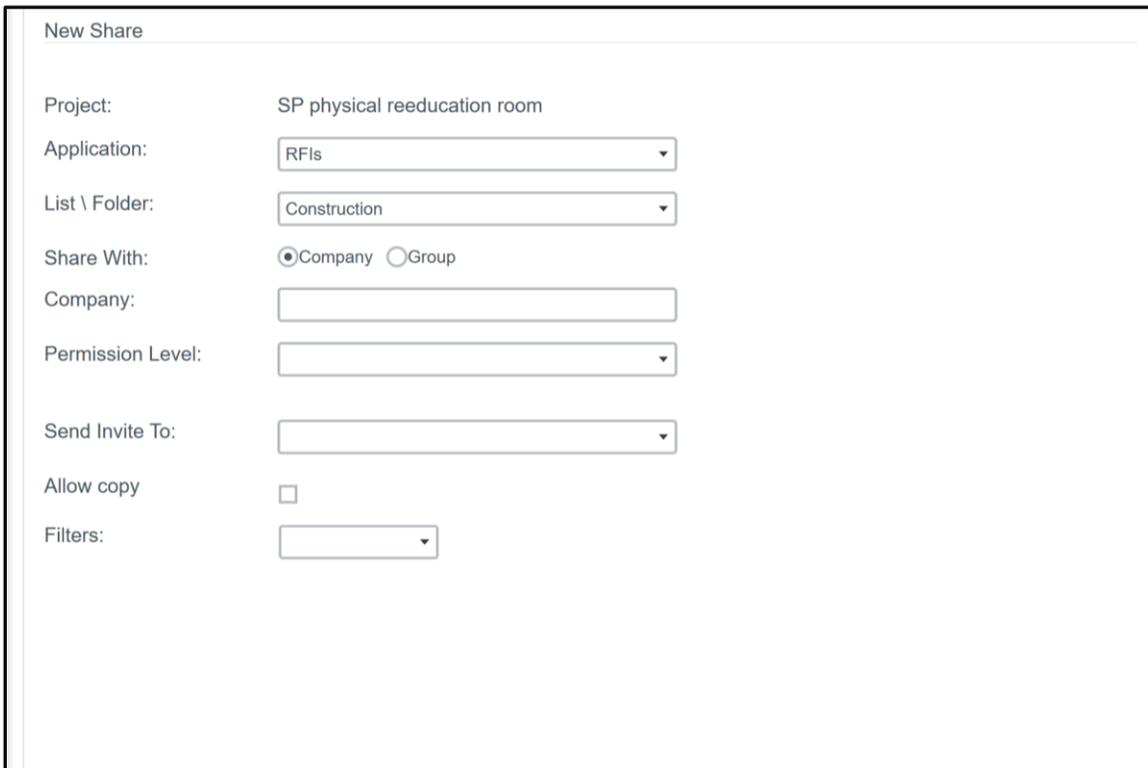
1. In the RFIs application, select **MORE**, a drop-down menu appears, select **SHARING**



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



3. A new window displays to the right.

A screenshot of the 'New Share' dialog box. The form contains the following fields:

- Project: SP physical reeducation room
- Application: RFI (dropdown)
- List \ Folder: Construction (dropdown)
- Share With: Company Group
- Company: (text input)
- Permission Level: (dropdown)
- Send Invite To: (dropdown)
- Allow copy:
- Filters: (dropdown)

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:

The screenshot shows a 'New Share' form with the following fields and values:

- Project: SP physical reeducation room
- Application: RFI (dropdown)
- List \ Folder: Construction (dropdown)
- Share With: Company Group
- Company: Newman Construction (with a close button 'x')
- Permission Level: Contractor (dropdown)
- ROLES: Contributor
- Send Invite To: Paul Newman - Newman Construction (dropdown, highlighted with an orange border)

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 business role of the person who will receive 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:

The close-up shows the 'Permission Level' dropdown menu with 'Contractor' selected. Below the dropdown, the text 'ROLES: Contributor' is displayed.

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: RFI's

List \ Folder: Construction

Share With: Company Group

Permission Level: Contractor

ROLES: Contributor

Note: Each company needs to approve sharing to view the shared item. You can send invites to one or more individuals.:

Send Invite To:

Name	Company	Company Status	Invitation Status	
<input type="checkbox"/>	Paul Newman	Newman Construction	Active	Invited

Permission Level – Using the drop down list, select the business role of the group that will receive 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 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

And Or

Reason Is Not Empty

And Or

- 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

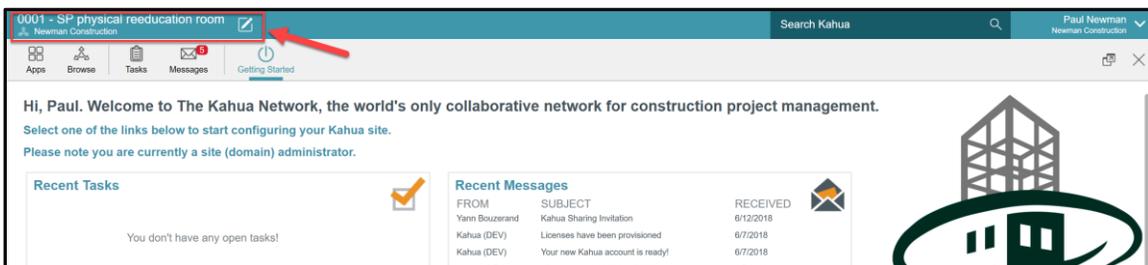
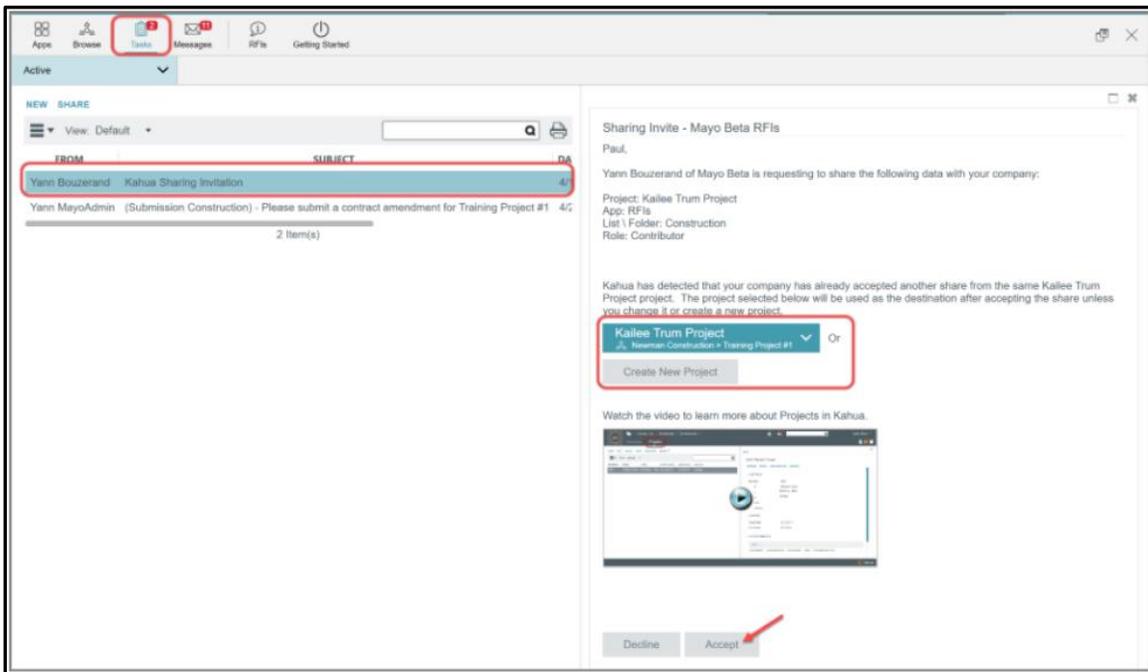
Note: this section has instructions for **Business Partners**. These steps do not apply to Mayo users.

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.

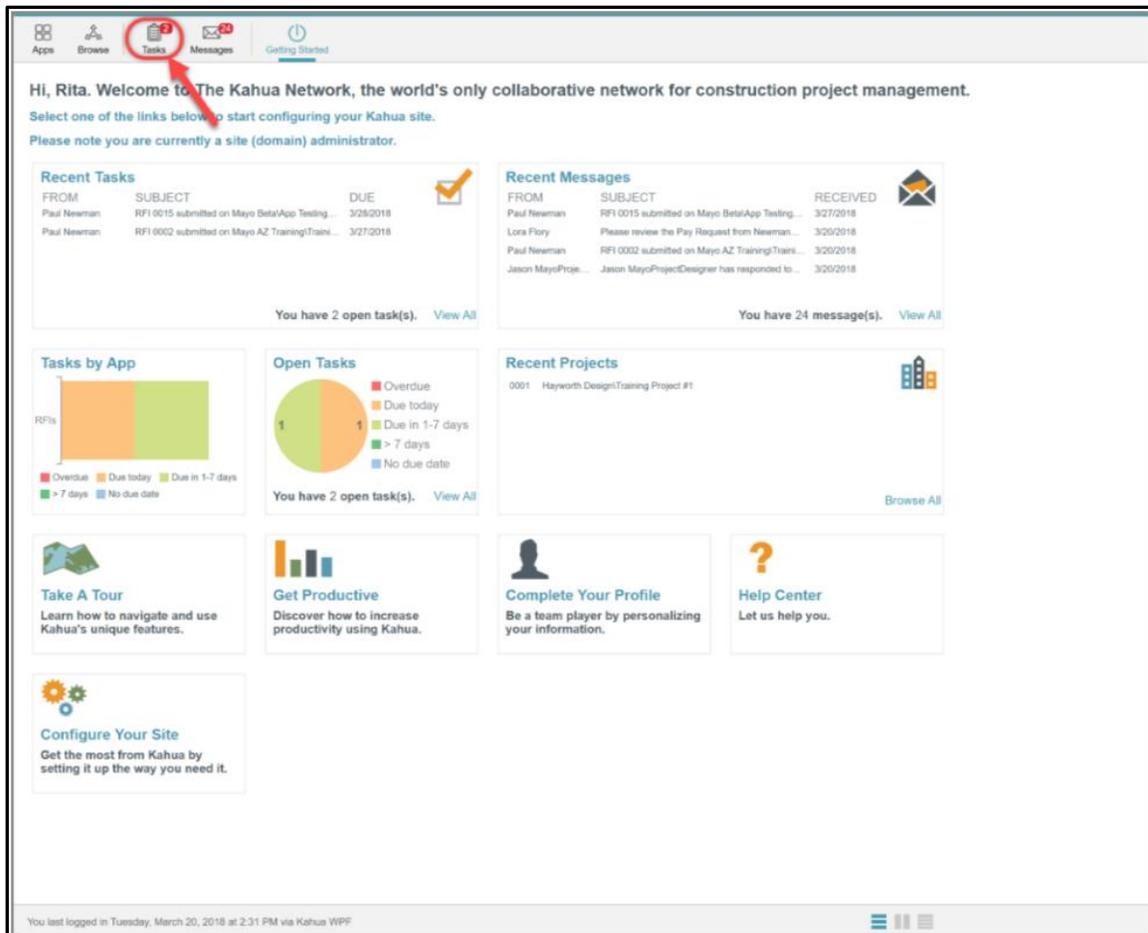


OFFICIAL RESPONDER SENDS THE RFI TO OTHER RESPONDERS

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.

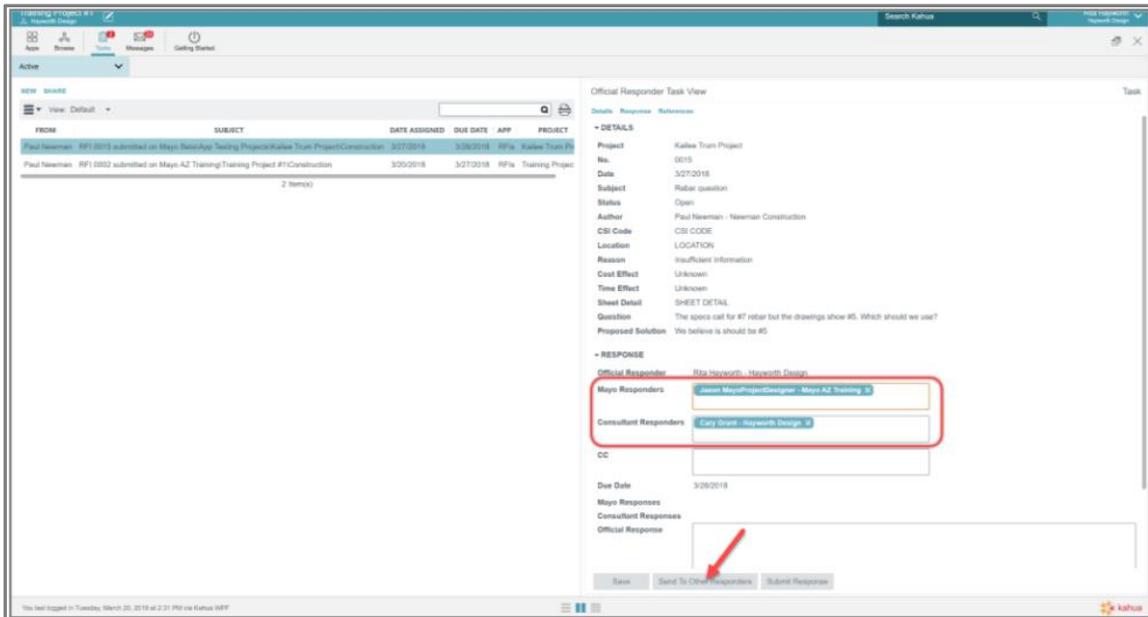
Note that the Mayo Responder and the Consultant Responder might be defaulted when the project is created. In this case they will be populated automatically in the appropriate fields.

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.



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

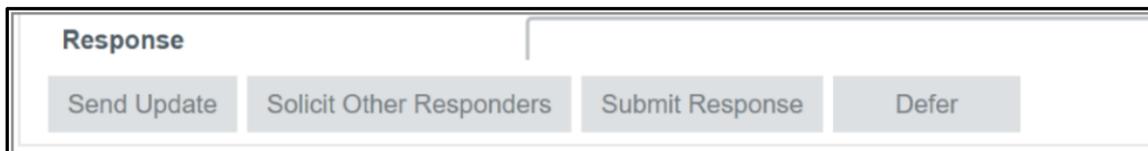
Mayo Responders and Consultant Responders are considered Secondary Responders. These users can submit responses to the Official Responder to assist in formulation of the final response. All the Secondary Responder responses are reviewed by the Official Responder. A Mayo Responder has several available 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: 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 timestamped note indicating the Mayo Responder's deferral is added to the other Responder's tasks.

CONSULTANT RESPONDER OPTIONS

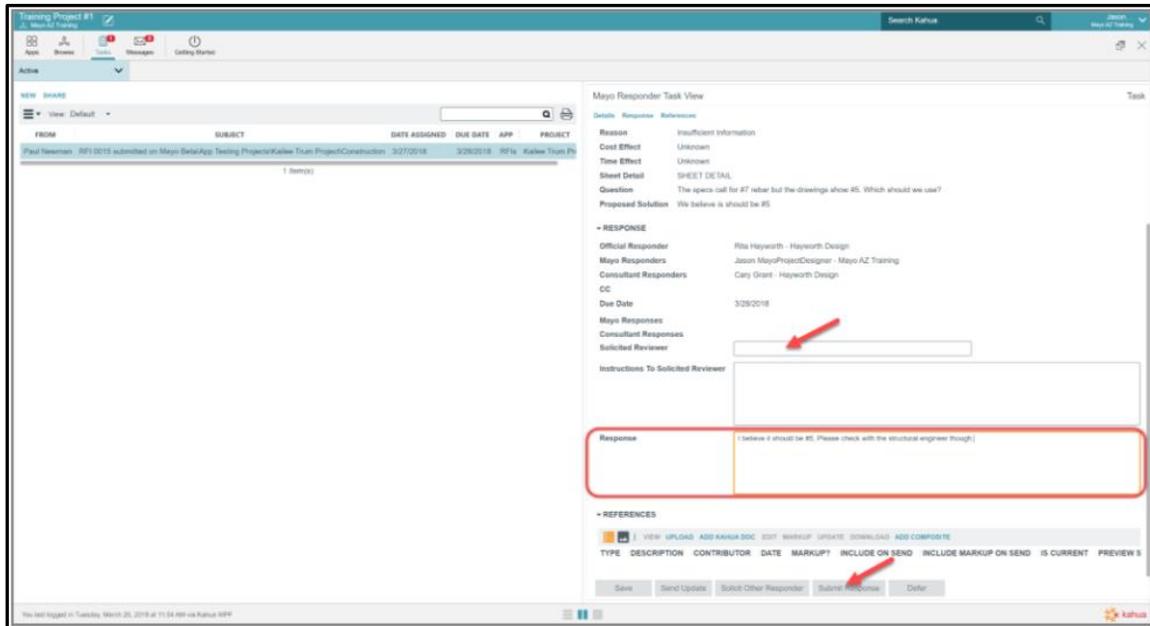
Consultant Responders have two possible actions: Send Update and Submit Response. The behavior is the same as for the Mayo Responder and is described above.



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'.



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.
3. 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.

The screenshot displays the 'Mayo Responder Task View' interface. At the top right, there is a 'Task' label. Below it, there are tabs for 'Details', 'Response', and 'References'. The main content area is divided into several sections:

- 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 (indicated by a red arrow)
- Instructions To Solicited Responder:** Could you take a look? (indicated by a red box)
- Response:** (Empty text area)
- Responsible:** Rita Hayworth - Hayworth Design

At the bottom, there is a 'REFERENCES' section with a toolbar containing icons for 'VIEW', 'UPLOAD', 'ADD KAHUA DOC', 'EDIT', 'MARKUP', 'DOWNLOAD', and 'ADD COMPOSITE'. Below the toolbar is a table with columns: 'TYPE', 'DESCRIPTION', 'CONTRIBUTOR', 'DATE', 'MARKUP?', 'INCLUDE ON SEND', 'INCLUDE MARKUP ON SEND', 'IS CURRENT', 'PREVIEW STATUS', and 'COM'. At the very bottom, there are four buttons: 'Send Update', 'Solicit Other Responders' (indicated by a red arrow), 'Submit Response', and 'Defer'.

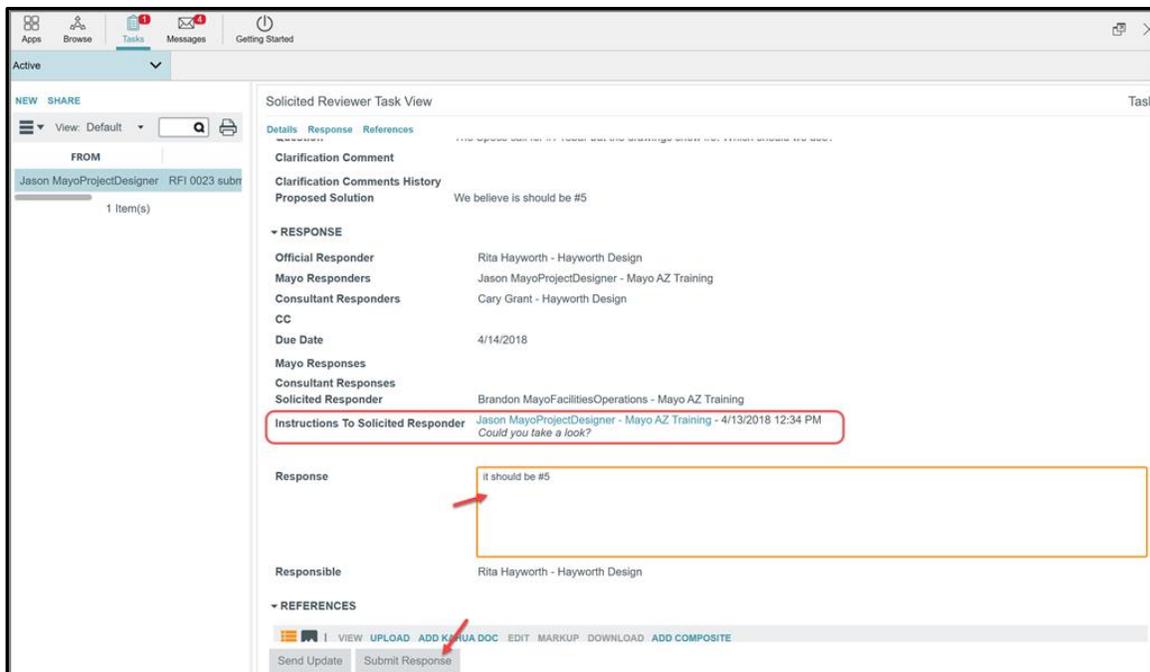
RESPONDING TO A REQUEST AS A SOLICITED RESPONDER

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.

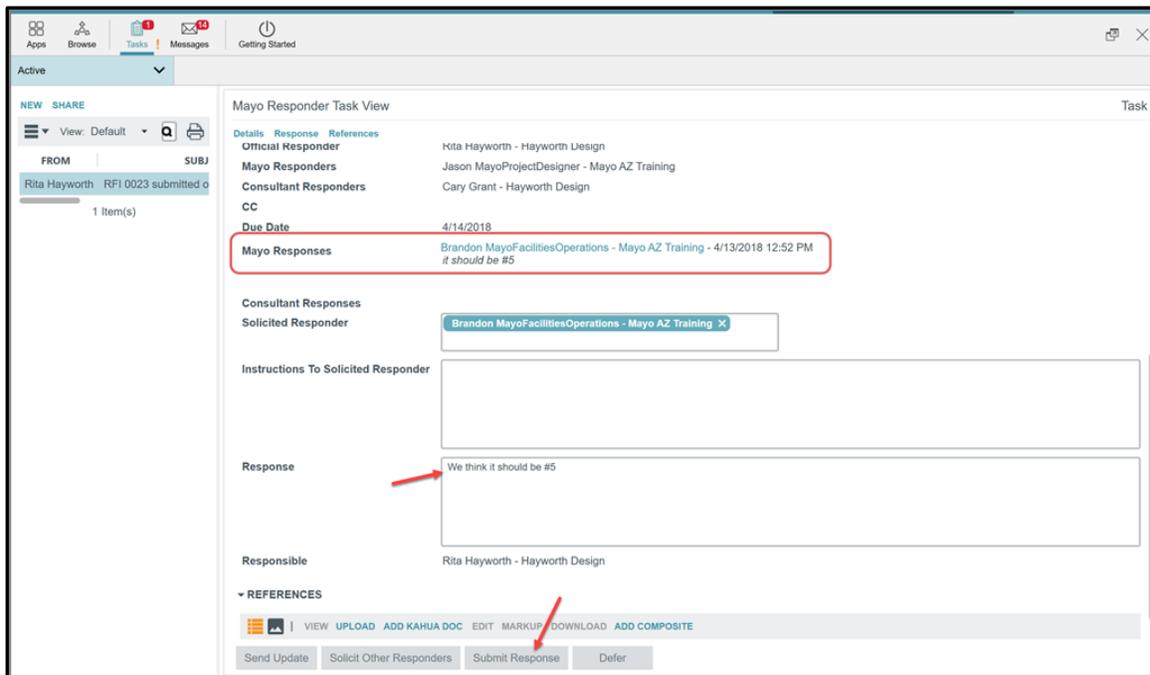
Note that the Solicited Responder response will appear in the **Mayo Response** section on all responders' tasks. The Official Responder will be able to see the response as well on their task.



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.



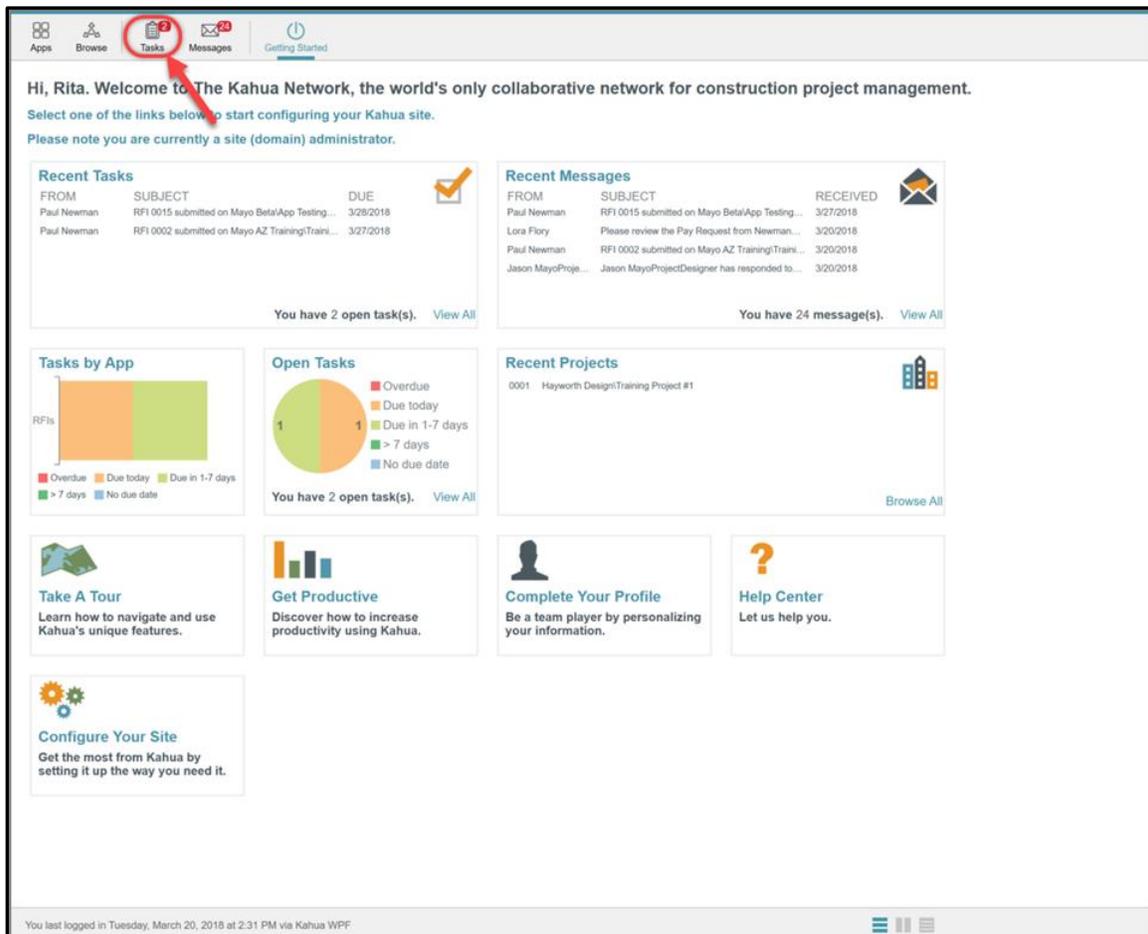
Note: Mayo Responders may submit a response at any time or can await insight from the Solicited Responders before submitting a response to the Official Responder.

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.

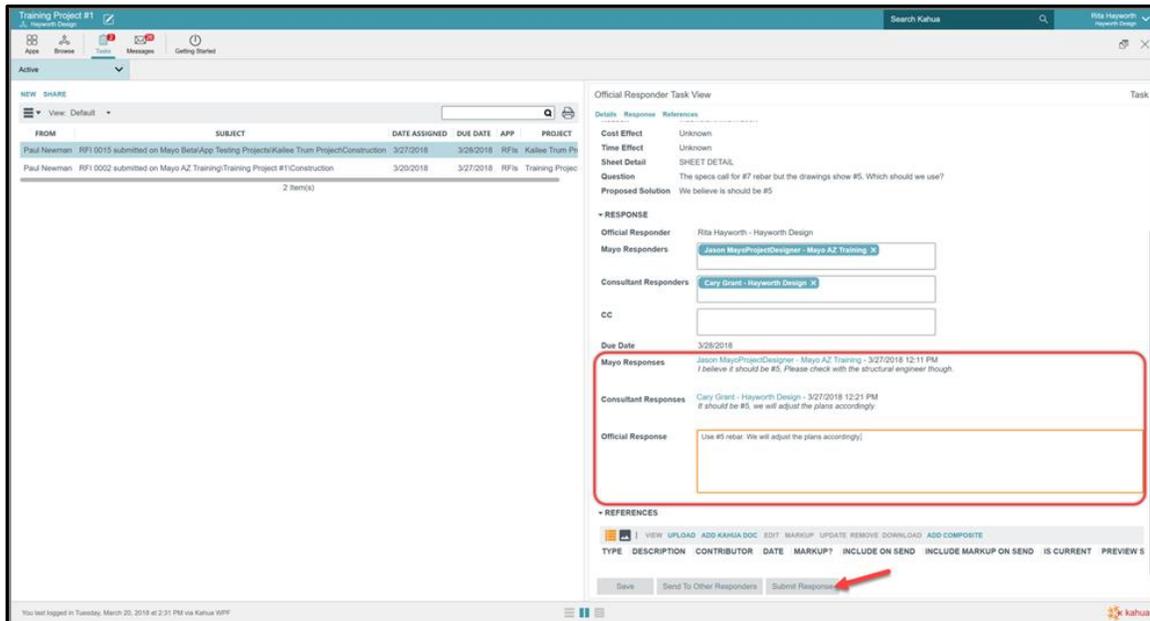
As the Official Responder, to respond to an RFI:

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.



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.

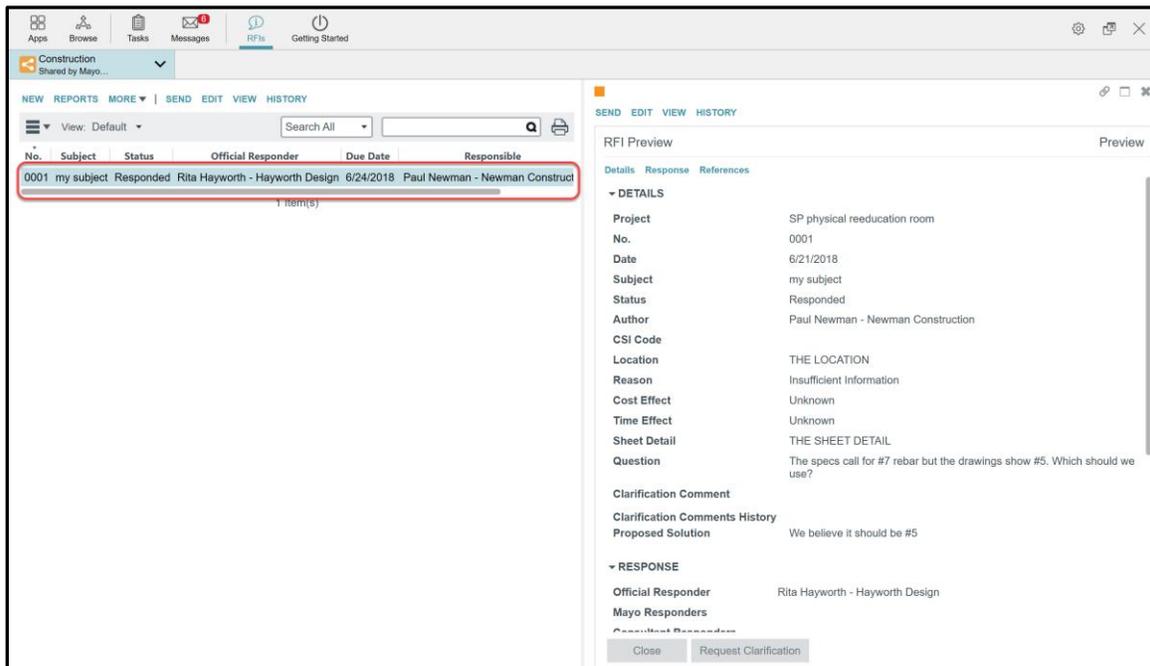


Notifications will be sent to the Contractor, secondary responders and contacts in the CC field as soon as the RFI is submitted.

CLOSING AN RFI AS THE REQUESTOR

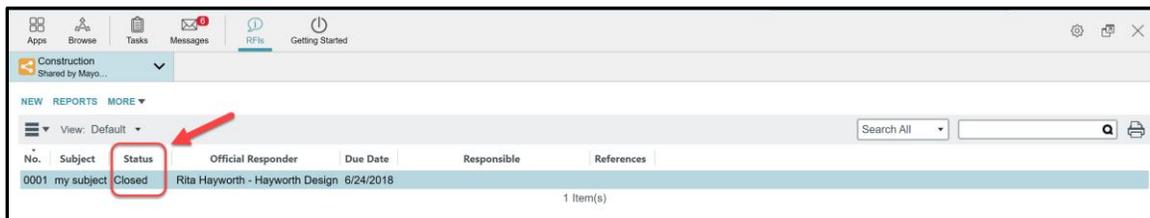
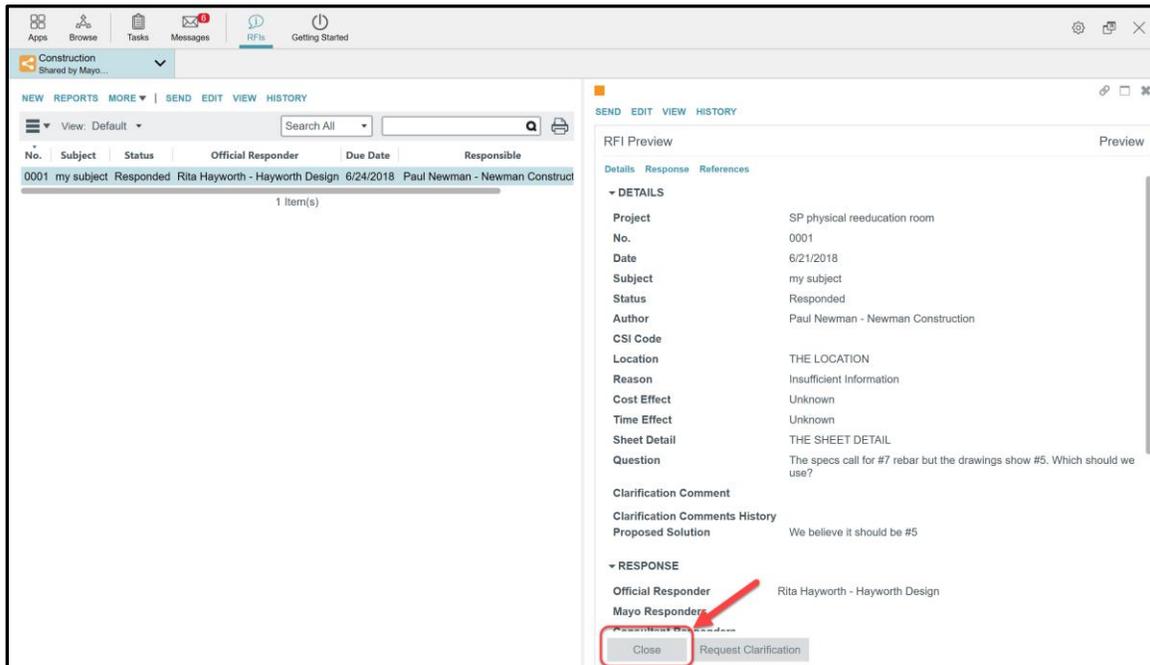
Once the RFI has been responded to, the Requestor will have an opportunity to review the response and close the RFI if the response is satisfactory. Otherwise, the Requestor is able send the RFI back for additional information. Once closed, the RFI cannot be edited and can only be unlocked by a Kahua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



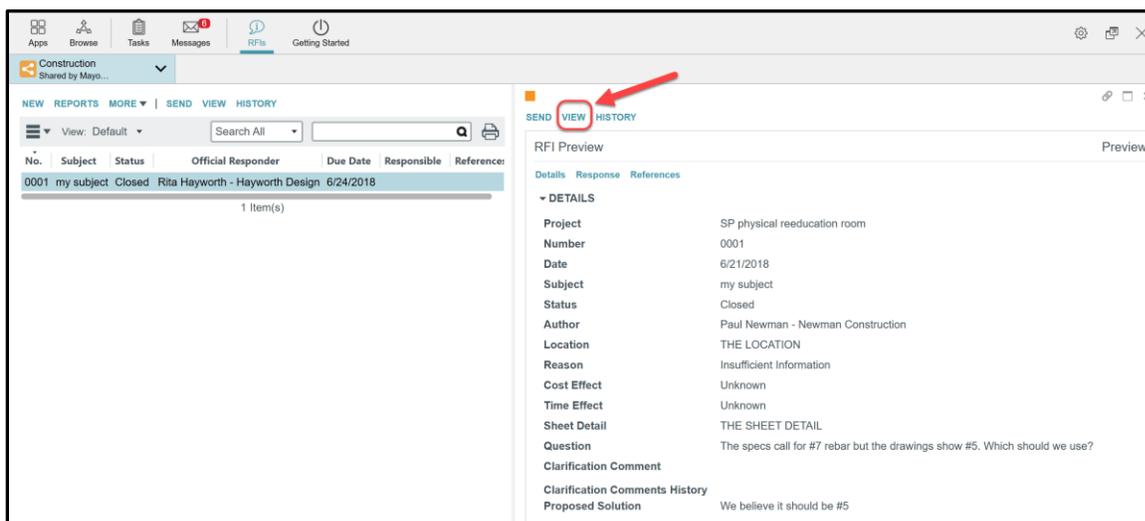
4. If the RFI response is satisfactory, change the status to **Closed** (otherwise send it back to the responders with a request for additional information by clicking Request Clarification).

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.



7. At the top of the right window, click the PDF icon  to view a PDF version of the RFI information and have the option to download and print it, depending on the PDF reader you've used.



To download the RFI document(s) uploaded:

1. Go to the REFERENCES section of the RFI then select the document(s) desired
2. Select **Download**. It will download the selected document(s) into the user computer.

