Issues/RFP Training Document

Presented by: OnIndus

Table of Contentss

Overview

Issues are any potential events that can have a potential financial or schedule impact on your project.

The Kahua Issues application enables you to easily log, track and manage issues on your project. Integrated with the Cost Management suite, Issues are used as a precursor for any change requests and change orders that might be issued.

Using the Issues application users will be able to:

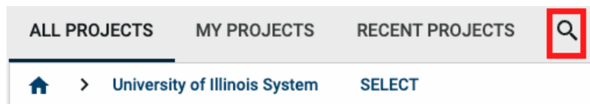
1. Initiate an Issue from other apps such as RFIs, Punch Lists, etc. (see diagram below)
2. Create one or many line items within an Issue. An issue can include multiple contractors / vendors.
3. Use workflow to gather pricing from contractors and vendors
4. Use workflow to review and or obtain approvals
5. Tracking projected, pending, and approved potential changes
6. Process the issue into other cost documents

In this guide we will go through the three types of Issues that can be created:

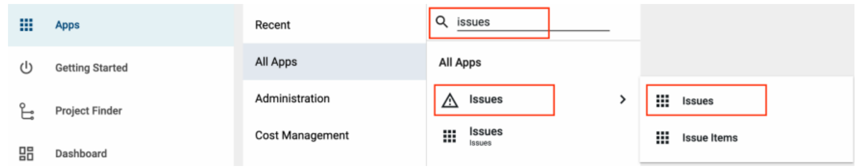
1. Change Orders known as Request for Proposal (RFP)
2. Field Directives (FD)
3. Emergency Work Authorizations (EWA)

Create a Change Order Type Issue

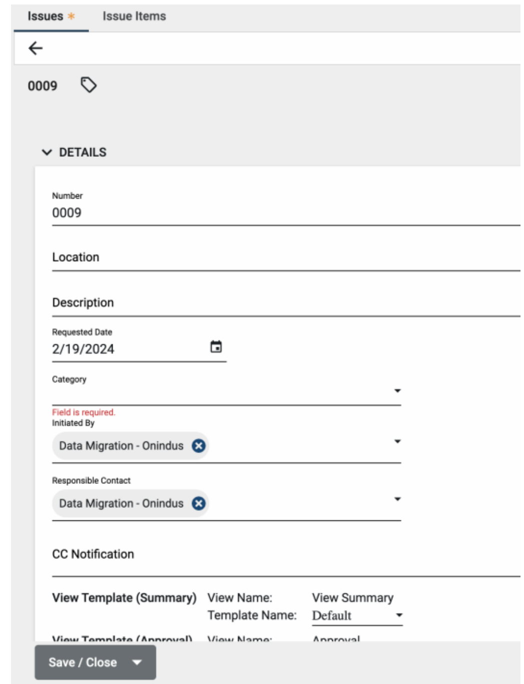
1. To create a new Issue, please navigate to the appropriate project and go to the Issues Application
    a. **Note**: Issues/RFP's will be created by the PSC,per if needed, assigned to the Project
2. To do this please navigate using the Project Finder by:
    a. Clicking on Project Finder in the left side Navigation
    b. Selecting the Project where the Contract was created
3. You can also use the Search functionality in the Project Finder to locate you project:
    a. Clicking on Project Finder in the left side Navigation
    b. Clicking on the Magnifying Glass icon next to Recent Projects, as shown in the image
    c. Type out the Project Name or number and click on the Project



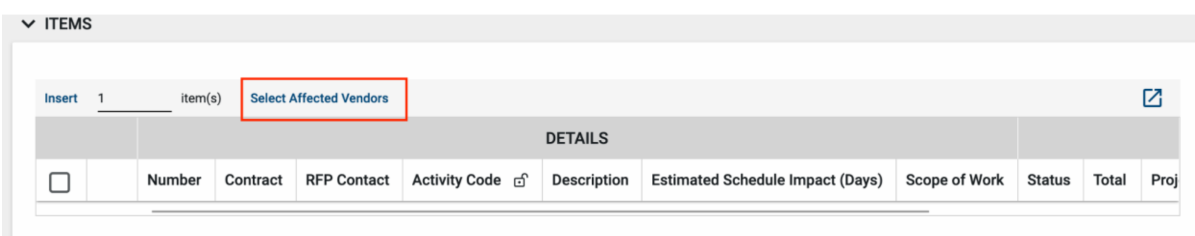
4. Once in the project go to the Issues Application by clicking on Applications and then searching for Issues using the Search Bar



5. Select the **Issues** application as show in the image, then click the **New** button to create a new Issue/RFP
6. Notice a new form on the right side of the screen
7. Select the Category which is a required field as Change Order
8. Populate the Details such as Date, Description, etc.
9. As the PSC will have to notify the Contractors and the CWA/CM when the Issue has been approved, they can add them to the CC Notification field in the Details section of the Issue

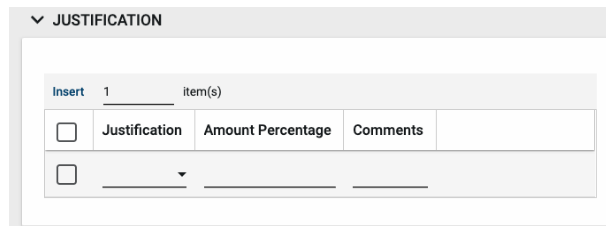


10. In the Scope section please enter the:
    a. Estimated Schedule Impact (Days)
    b. Scope of Work (Required Field)
    c. Estimated Cost
    d. Not to Exceed Price
11. In the Dates & Workflow section please enter the Due Date
12. In the Items section click on the Select Affected Vendors button above the Details bar
    a. This will allow you to select the all construction Contract(s) on the project
    b. Once the contracts have been checked click on Select

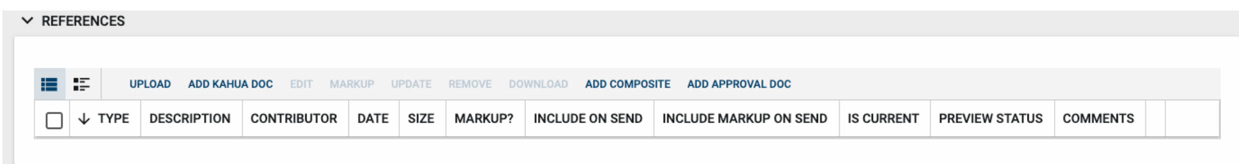


c. **Note**: If the Due Date was entered before the contracts were added to the line items the Pricing Due Date in the Items Grid will be auto-filled, if not it will have to be filled Manually

13. If any additional details need to be added please click on the icon next to the line item, this will open the Details Panel
    a. Use the Previous and Next action buttons to sort through the Items if needed
14. **Note**: Please **DO NOT** enter the Estimated Schedule Impact (Days) and Total values in the **Items Grid** as these will be provided by the Contractors on the Contract
15. Click Done once details have been added
16. In the next section you can add one or more the Justification(s) for the Issue along with the Amount Percentage and Comments



    a. **Note**: The Justification Amount Percentage has to Total to 100 across the lines added
17. Documents can be attached to the record under the References section. The user can either:



    a. Upload a document saved on their computer
    b. Add Kahua Doc to reference a document that is stored within Kahua's File Manager application
    c. Add Approval Doc which is used anytime a record is being routed for Review or Signature.
18. Once all details have been filled out, click Save/Close and then please click on **Submit** to send to the CWA/CM to Get Pricing from the Contractors
19. **Note**: If CWA/CM do not exist on the Project the PSC can Get Pricing and then **Submit for Review** and complete the Review. Once Review is complete it can be Sent for Approval

Issue Action Buttons

Once the fields within the record have been completed and saved, the users can select from several actions:

SEND EDIT VIEW DELETE HISTORY

- **Send** – Use messaging to send record details to others (NOT to be confused with a workflow)
- **Edit** – Update and maintain the record
- **View** – This action button displays the Portable View (document view)
- **Delete** – Select this action button to delete a record (typically permission based, so all may not see this)
- **History** – All updates/changes are tracked

Send

- Do not confuse **Send** with using the workflow buttons in any application
- Documents can be sent via a message within Kahua to either existing Kahua users or users outside of Kahua by entering their email address and clicking **Enter**
- The documents are treated as attachments, and the message can be copied to the **Communications** application by checking the box

Edit

- The record can be updated as needed during the process
- If the document is out for Review or Signature, **Edit** will not be available

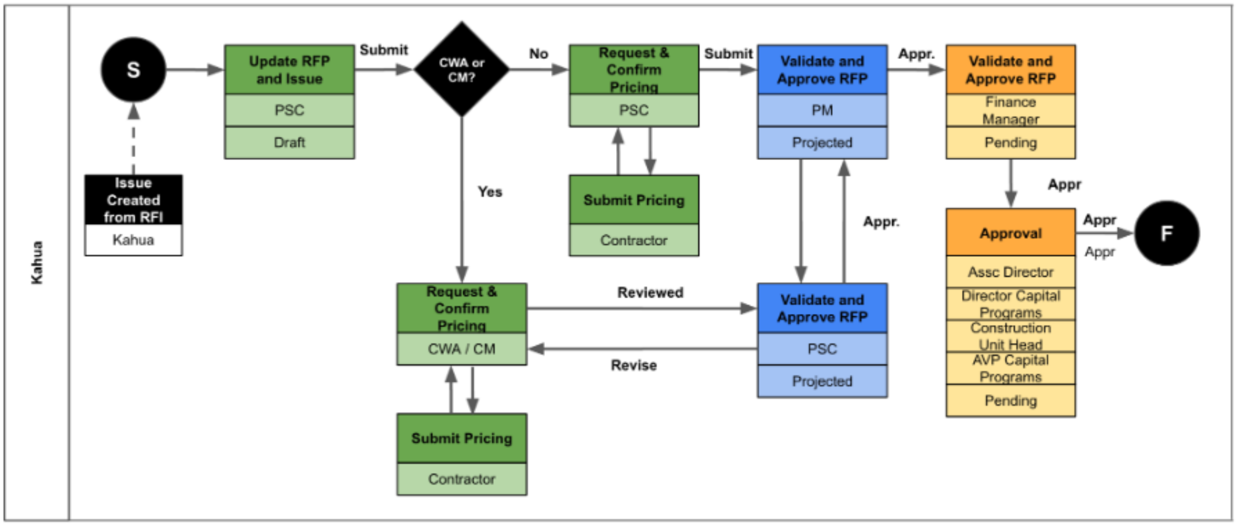
View

- Records can be viewed as a Portable View in which a PDF version of the data is generated and can be printed out. Select the **PDF Icon** to generate a printable PDF version of the document

History

- The **History** action button provides details regarding all activity (Creation, Updates, Saves, etc.) performed on the record
- To see specific details related to the updates made, click the View Edit button

Workflow - Change Order Type Issue

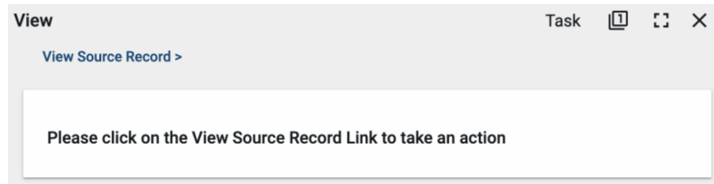


RFP/Issues - Pricing	Category = Change Order	Created from RFI/PSC creates RFP	Originating in Kahua	
Order	Workflow Status	Role Type (Name or Actor)	Approval Threshold	Approval Limit
1	Data Entry	PSC creates/updates the RFP	N/A	N/A
2	Sent for Pricing	If CWA/CM exist on the project, PSC sends RFP for review, if not PSC gets & confirms Pricing	N/A	N/A
3	Get Pricing	CWA/CM verify RFP & go to record to get pricing from Vendors/Contractors	N/A	N/A
4	Confirm Pricing	CWA/CM confirm Pricing received from Contractors	N/A	N/A
5	Sent for Review	CWA/CM sends to PSC for Review	N/A	N/A
6	Reviewed	PSC completes Review of Pricing	N/A	N/A

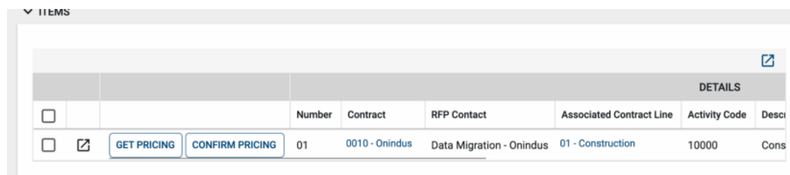
RFP/Issues - Approval	**Category = Change Order**	**Reviewed RFP & Pricing sent for approval by PSC**	Originating in Kahua	
Order	**Workflow Status**	**Role Type (Name or Actor)**	**Approval Threshold**	**Approval Limit**
1	Sent for Approval	PSC sends Reviewed RFP for Approval	N/A	N/A
2	Approval	Project Manager	N/A	N/A
3	Approval	Financial Manager	N/A	N/A
4	Approval	Associate Director of Capital Programs	N/A	N/A
5	Approval	University Director for Capital Programs	≥ $50,000	N/A
6	Approval	University Construction Unit Head	≥ $75,000	N/A
7	Approval	Assistant Vice President of Capital Programs & Utility Services	≥ $100,000	N/A
8	Approval	Contract Specialist	N/A	N/A
Once RFP/Issue has been Approved, it will be auto processed as a Change Order and sent to Financial Manager for Approval if there is a Cost or Schedule Impact				

Get Pricing Step

1. When the PSC clicks the Submit button, a Task and an Email will be sent to the CWA/CM, who was auto-filled in the Responsible Contact in the record
2. Once the Task has been clicked it will ask the CWA/CM to go to the Source Record to start the Get Pricing step



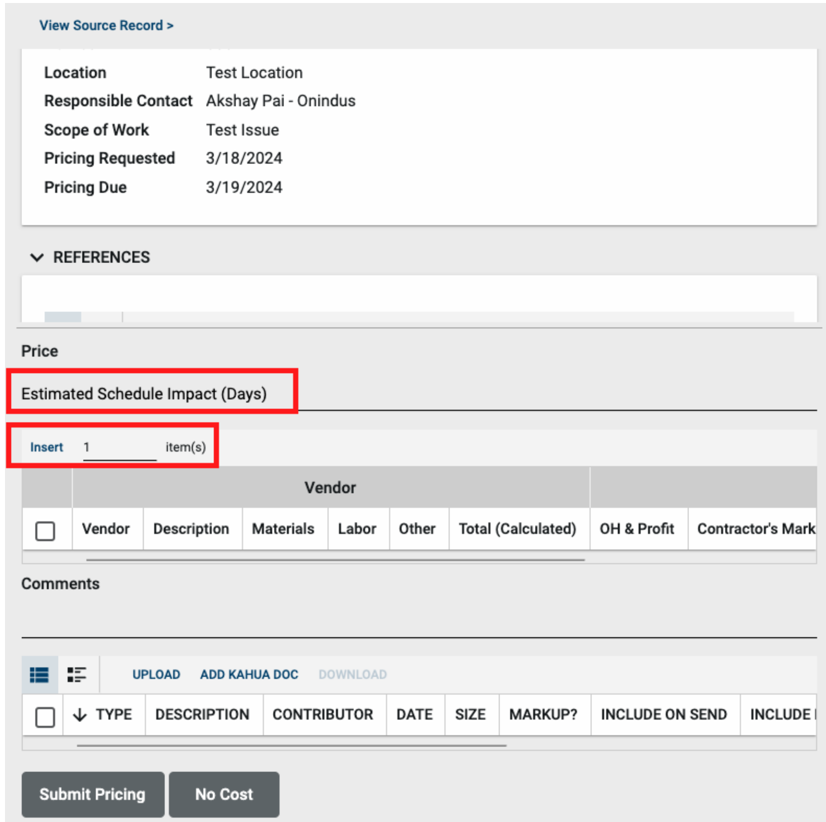
3. On clicking the View Source Record button, it will take the CWA/CM to the Issue/RFP record
4. Please scroll to the Items Grid where you can see two buttons next to each impacted contract



5. Click on the Get Pricing Button, this will automatically create a Task for the Contractor selected in the To Parties section of that Contract
    a. You can also use the Checkbox selector to select all the impacted contracts and then click on the Get Pricing Option that is now visible in the header
6. Tasks along with emails will be sent to the Contractors on the impacted contracts

Enter Pricing

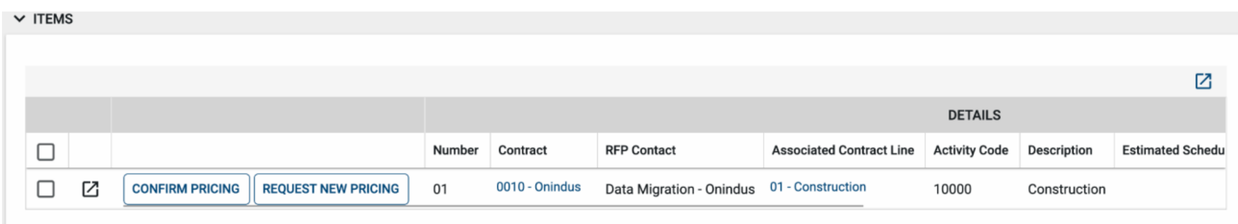
1. As the Contractor on the contract you will receive a Task and an Email to enter the Pricing as well as the Estimated Schedule Impact (Days)



2. Please login to Kahua and click on the Task, a screen similar to the image will be shown
3. Enter the Estimated Impact in Days and then click on the Insert button to add the pricing for each of your subs including yourself
4. Attach the U of I RFP breakdown form and any other supporting documents that need to be attached in the Reference Section
5. Once this is done, click on the Submit Pricing button
    a. <u>**Note**</u>: If there is no cost please click on No Cost
6. The pricing and the days will be sent back to the CWA/CM for confirmation

Confirm Pricing Step

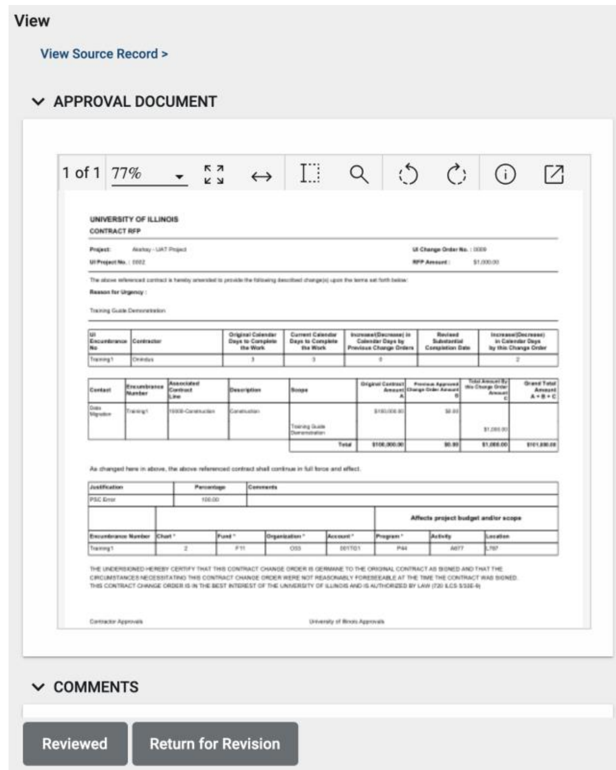
1. Once the Pricing has been received the CWA/CM can view the record and can see the data has been entered in the respective columns
    a. To see additional details on the Pricing breakdown by Materials, Labor and Other please click on the Pop-out button next to the record
    b. You will see a section called Vendor Pricing which will provide a breakdown of the Pricing
    c. To go back to the main record, click Done located on the top right of the screen
2. If the Pricing and the Estimated Schedule Impact received from all contractors is agreeable by the CWA/CM, please click on the Confirm Pricing button
3. If not please click on the Request New Pricing to start the Get Pricing process again



4. When the total pricing from all contractors has been confirmed please click on the **Submit for Review** button at the bottom of the record, this will send it to the PSC to review
5. In case the PSC is not satisfied with the pricing or the estimated schedule impact they can send it back for revision

Review & Approval Process

1. When the Review process is started, a Task and Email will be sent to the PSC to review the Pricing and Estimated Schedule Impact
2. A screen similar to the image will be displayed when the Task has been clicked



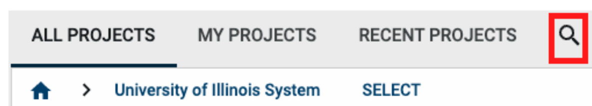
3. To view the record please click on the View Source Record
4. If all the information provided by the Contractor & CWA/CM is agreeable please click on the Reviewed button.
    a. If Revisions are needed click on the Return for Revision
5. Once the Reviewed button is clicked the status will be updated to Reviewed Complete
6. The PSC can now start the Threshold based Approval outlined on Page-9 by clicking on the Submit for Approval button
7. **Note**: Even after the Review has been completed but prior to sending it for Approval the PSC can send it back to the CWA/CM to Resubmit Pricing
8. Once all the Approvals have been received for the Issue/RFP and provided there is a Cost/Schedule Impact, the impacted contracts will be auto-processed into Change Orders and sent to the Financial Manager for Approval

9. If the Contractors and CWA/CM have been added to the CC notifications they will receive an email when the Issue/RFP has been approved. If not the PSC can manually notify them using the Send button located at the top

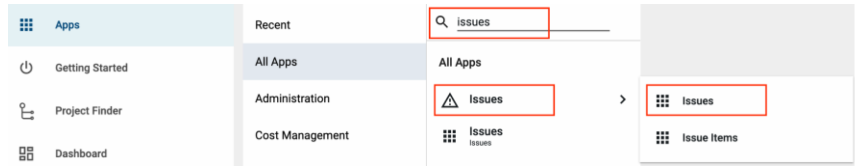
Note: Issue/RFP approval is not the final Change Order approval, which comes later in the approval process.

Create a FD/EWA Type Issue

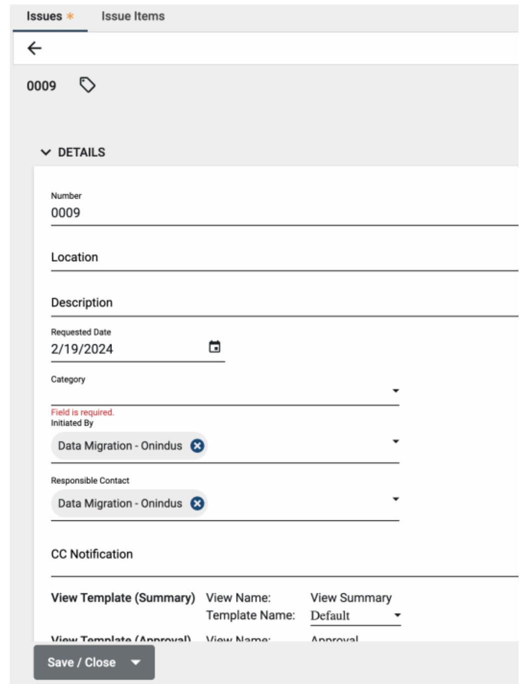
1. To create a new Issue, please navigate to the appropriate project and go to the Issues Application
    a. **Note**: Issues/RFP's will be created by the PSC assigned to the Project
2. To do this please navigate using the Project Finder by:
    c. Clicking on Project Finder in the left side Navigation
    d. Selecting the Project where the Contract was created
3. You can also use the Search functionality in the Project Finder to locate you project:
    a. Clicking on Project Finder in the left side Navigation
    b. Clicking on the Magnifying Glass icon next to Recent Projects, as shown in the image below
    c. Type out the Project Name and click on the Project



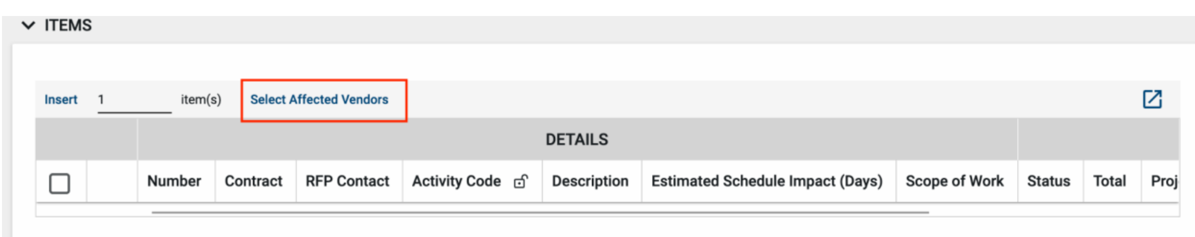
4. Once in the project go to the Issues Application by clicking on Applications and then searching for Issues using the Search Bar



5. Select the **Issues** application as show in the image, then click the **New** button to create a new Issue/RFP

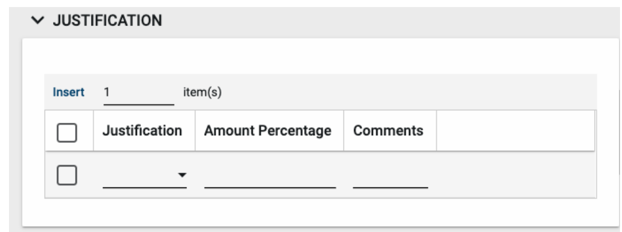


6. Notice a new form on the right side of the screen
7. Select the Category which is a required field as either Field Directive or Emergency Work Authorization
8. Populate the Details such as Date, Description, etc.
9. As the PSC will have to notify the Contractors and the CWA/CM when the Issue has been approved, they can add them to the CC Notification field in the Details section of the Issue
10. In the Scope section please enter the:
    a. Estimated Schedule Impact (Days)
    b. Scope of Work (Required Field)
    c. Estimated Cost
    d. Not to Exceed Price
11. In the Dates & Workflow section please enter the Due Date
12. In the Items section click on the Select Affected Vendors button above the Details bar
    a. This will allow you to select all the construction contract(s) on the project
    b. Once the contracts have been checked click on Select

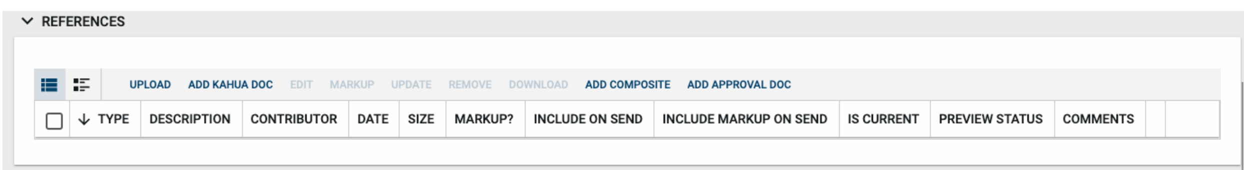


c. **<u>Note</u>**: If the Due Date was entered before the contracts were added to the line items the Pricing Due Date in the Items Grid will be autofilled, if not it will have to be filled Manually

13. If any additional details need to be added please click on the  icon next to the line item, this will open the Details Panel
    a. Use the Previous and Next action buttons to sort through the Items if needed
14. **<u>Note</u>**: Please **<u>DO NOT</u>** enter the Estimated Schedule Impact (Days) and Total values in the **<u>Items Grid</u>** as these will be provided by the Contractors on the Contract
15. Click Done once details have been added
16. In the next section you can add one or more Justification(s) for the Issue along with the Amount Percentage and Comments
    a. **<u>Note</u>**: The Justification Amount Percentage has to Total to 100 across the lines added



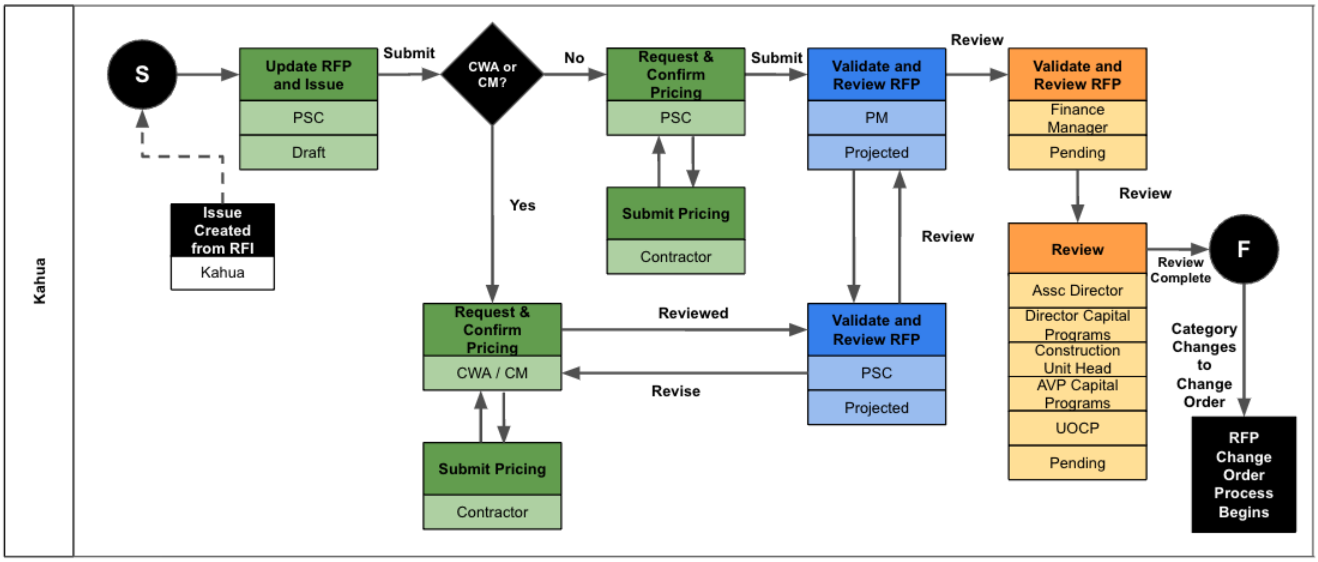
17. Documents can be attached to the record under the References section. The user can either:



    a. Upload a document saved on their computer
    b. Add Kahua Doc to reference a document that is stored within Kahua's File Manager application
    c. Add Approval Doc which is used anytime a record is being routed for Review or Signature.
18. Once all details have been filled out, click Save/Close and then please click on **<u>Submit</u>** to send to the CWA/CM to Get Pricing from the Contractors

<u>Note</u>: If CWA/CM do not exist on the Project the PSC can Get Pricing and then Submit for Review.

Workflow - Type FD/EWA

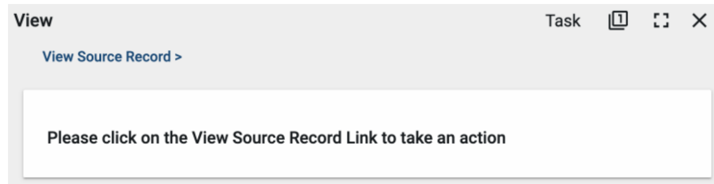


RFP/Issues - Approval	Category = FD/EWA	FD/EWA Sent for Pricing & Review	Originating in Kahua	
Order	Workflow Status	Role Type (Name or Actor)	Approval Threshold	Approval Limit
1	Data Entry	PSC creates/updates the RFP	N/A	N/A
2	Sent for Review	If CWA/CM exist on the project, PSC sends RFP for pricing, if not PSC gets & confirms Pricing	N/A	N/A
3	Get Pricing	CWA/CM verify RFP & go to record to get pricing from Vendors/Contractors	N/A	N/A
4	Confirm Pricing	CWA/CM confirm Pricing received from Contractors	N/A	N/A
5	Review	CWA/CM starts the review process	N/A	N/A
6	Review	PSC	N/A	N/A
7	Review	Project Manager	N/A	N/A

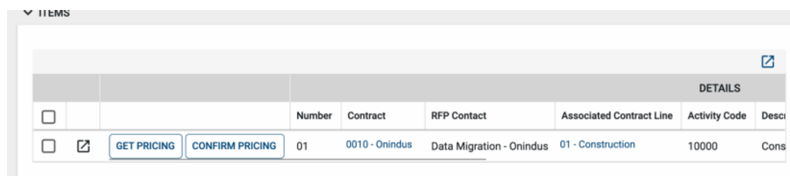
8	Review	Financial Manager	N/A	N/A
9	Review	Associate Director of Capital Programs	N/A	N/A
10	Review	University Director for Capital Programs	N/A	N/A
11	Review	University Construction Unit Head	>$75,000	N/A
12	Review	Assistant Vice President of Capital Programs & Utility Services	> $99,999.99	N/A
13	Review	UOCP	> $100,000	N/A
Once Field Directive/EWA Review is complete, the Category will auto change to Change Order & it will follow the Change Order Review & Pricing Workflow				

Get Pricing Step - FD/EWA

1. When the PSC clicks the Submit button, a Task and an Email will be sent to the CWA/CM, who was auto-filled in the Responsible Contact in the record
2. Once the Task has been clicked it will ask the CWA/CM to go to the Source Record to start the Get Pricing step



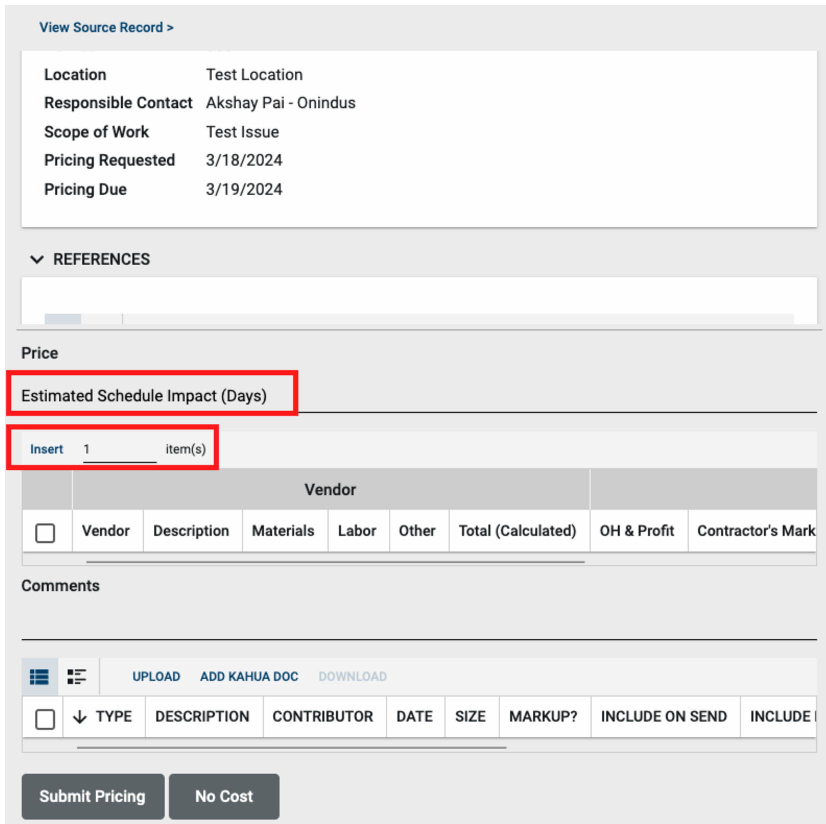
3. On clicking the View Source Record button, it will take the CWA/CM to the Issue/RFP record
4. Please scroll to the Items Grid where you can see two buttons next to each impacted contract



5. Go ahead and click on the Get Pricing Button, this will automatically create a Task for the Contractor selected in the To Parties section of that Contract
    a. You can also use the Checkbox selector to select all construction contracts and then click on the Get Pricing Option that is now visible in the header
6. Tasks along with emails will be sent to the Contractors on the impacted contracts

Enter Pricing - FD/EWA

1. As the Contractor on the contract you will receive a Task and an Email to enter the Pricing as well as the Estimated Schedule Impact (Days)
2. Please login to Kahua and click on the Task, a screen similar to the image will be shown
3. Enter the Estimated Impact in Days and then click on the Insert button to add the pricing for each of your subs including yourself
4. Attach the U of I RFP breakdown form and any other supporting documents that need to be attached in the Reference Section



5. Once this is done, click on the Submit Pricing button
   a. **Note**: If there is no cost please click on No Cost
6. The pricing and the days will be sent back to the CWA/CM for confirmation

Confirm Pricing Step - FD/EWA

1. Once the Pricing from all contractors has been received the CWA/CM can view the record and can see the data has been entered in the respective columns
    a. To see additional details on the Pricing breakdown by Materials, Labor and Other please click on the Pop-out button next to the record
    b. You will see a section called Vendor Pricing which will provide a breakdown of the Pricing
    c. To go back to the main record, click Done located on the top right of the screen
2. If the Pricing and the Estimated Schedule Impact received from all contractors is agreeable by the CWA/CM, please click on the Confirm Pricing button
3. If not please click on the Request New Pricing to start the Get Pricing process again

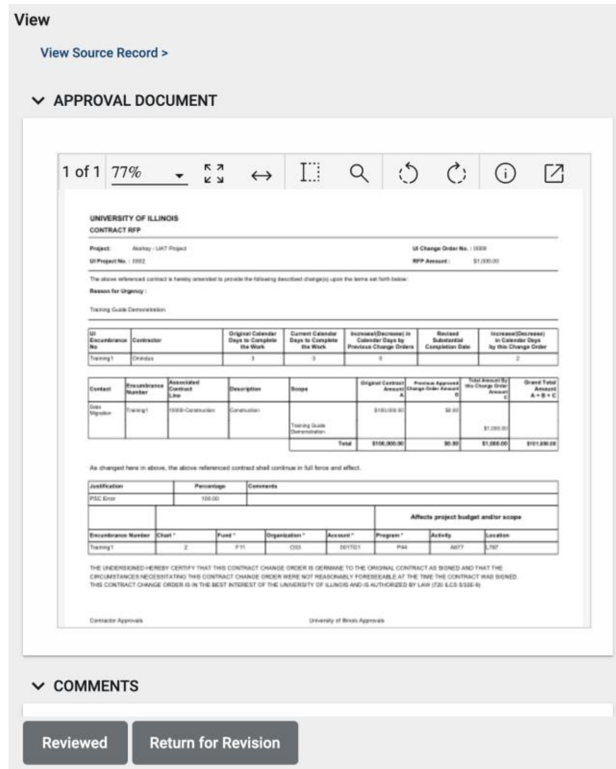
ITEMS

			DETAILS						
			Number	Contract	RFP Contact	Associated Contract Line	Activity Code	Description	Estimated Schedu
		CONFIRM PRICING / REQUEST NEW PRICING	01	0010 - Onindus	Data Migration - Onindus	01 - Construction	10000	Construction	

4. When the total pricing from all contractors has been confirmed please click on the **Submit for Review** button at the bottom of the record, this will start the Field Directive/Emergency Work Authorization Threshold based Review Workflow outlined on Page-17

Review Process - FD/EWA

1. When the Threshold based Review process is started, a Task and Email will be sent first to the PSC to review the Pricing and Estimated Schedule Impact
2. A screen similar to the image will be displayed when the Task has been clicked



3. To view the record please click on the View Source Record
4. If all the information provided by the Contractor & CWA/CM is agreeable please click on the Reviewed button
    a. If revisions are needed, click on the Return for Revision button
5. Once the Reviewed button is clicked it will be sent to the next Reviewer in the process
6. Once all the Reviews have been received for the FD/EWA the PSC can notify the Contractors accordingly
    a. If the Contractors and CWA/CM have been added to the CC notifications they will receive an email when the FD/EWA has been reviewed
    b. If not the PSC can manually notify them using the Send button located at the top
7. <u>**Note**</u>: Once the Review has been completed the Category will automatically change to Change Order and then PSC can then use the steps outlined in the Change Order Type issue to go through the process

Resources

For additional help with Kahua applications please reach out to the Technical team of the University with any questions

Submit a Support Request or email at servicedeskaits@uillinois.edu

UIC: (312) 996-4806

UIS and UIUC: (217) 333-3102