

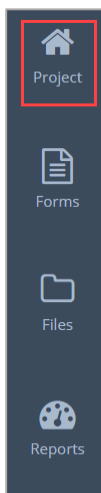
Request for Information

The purpose of an RFI is to collect written confirmation or clarification from the architect, contractor or client that is needed to continue work. RFIs are often necessary to confirm details on the project specifications or drawings.

This document type is typically created by vendors. There are two structured workflows for this document and the RFI creator will initiate the appropriate workflow to submit the question to the relevant responder.

Creating a New RFI – Performed by the party asking the question.

1. Click the **Forms** button to open the forms search. If you have added the Request for Information to your Favorite Form Types, you can quickly access the document from the Project Home page.



2. Begin typing **Req** and select **Request for Information**.

Form Types

Req

★ MY FAVORITES EDIT

Contingency Draw Requests

≡ VIEW ALL FORM TYPES

Contingency Draw Requests

Requests For Information

Requests For Proposal

Requisition Requests

- Click the **New** button on top of the RFI log.

New Print ...

- Click inside the **Date** field and select the date.

Date

March 2020

Sun	Mon	Tue	Wed	Thu	Fri	Sat
01	02	03	04	05	06	07
08	09	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31	01	02	03	04
05	06	07	08	09	10	11

- Click the **Get Next** button to add the **RFI Number**. This step will automatically number the RFIs in sequential order.

RFI Number

Get Next

- Click inside the **Author Company** field and select the name of the company who is submitting the RFI.

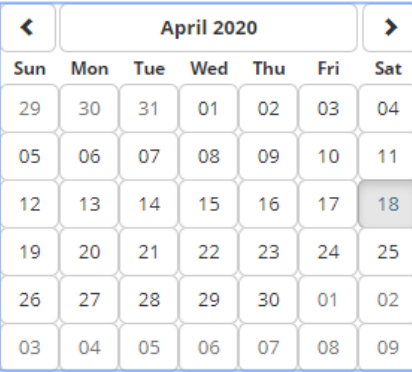
Author Company

7. Enter the **Author RFI Number** if applicable.

Author RFI Number

8. Enter the RFI **Due Date**. The RFI response duration can be found in your contract.

Due Date



The calendar shows April 2020. The days of the week are Sun, Mon, Tue, Wed, Thu, Fri, Sat. The dates are arranged in a grid. The 18th is highlighted in blue.

Sun	Mon	Tue	Wed	Thu	Fri	Sat
29	30	31	01	02	03	04
05	06	07	08	09	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	01	02
03	04	05	06	07	08	09

9. Enter a brief description or title for the RFI in the **Subject** field.

Subject * Required

10. Enter the full description of the RFI in the **Question** field.

Question

11. Click inside the **Discipline** field and select the discipline which best applies to the RFI.

Discipline

12. To add drawings which exist in ProjectTeam to the RFI document, click the **Add Existing** button.

Drawing Number			
			<input type="button" value="Add Existing"/> <input type="button" value="Create New"/>
Subject	Drawing #	Revision #	Revision Date

- a. If you would like, use the **search** feature to find a specific drawing. Click the **checkbox(es)** beside **each drawing** you wish to add and click the **Add** button.

Add Drawing Number

Subject	Drawing #	Revision #	Revision Date
<input checked="" type="checkbox"/> Test Drawing Data	0001	01	1/9/20

13. Enter the applicable **Column Line** information from the referenced drawing if you wish to provide a specific location pertaining to the RFI.

Column Lines
<input type="text" value="Type the Column Lines"/>

14. To add an existing specification, click the **Add Existing** button in the Specification Section table.

Specification Section			
			<input type="button" value="Add Existing"/> <input type="button" value="Create New"/>
Subject	Specification #	Revision #	Revision Date

- a. If you would like, use the search feature to find a specific specification. Click the **checkbox(es)** beside **each specification** you wish to add and click the **Add** button.

Add Specification Section ×

Search... 🔍

	Subject	Specification #	Revision #	Revision Date
<input checked="" type="checkbox"/>	Spec Subject	Construction	02	1/9/20
<input type="checkbox"/>	New Subject	OSHA 12.33	01	1/9/20
<input checked="" type="checkbox"/>	Wire Test	OSHA 2.22	01	1/8/20
<input type="checkbox"/>	Electrical Wire Load Test	10100	0	1/8/20

Cancel
Add

15. To add an Impact, click the **Create New** button.

Impact

↗
Create New
...

	Company Name	Cost Impact	Schedule Impact	Drawing Impact
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a. Enter the **Company Name**.

Company Name

b. Enter the **Cost Impact** (Dollars) if applicable.

Cost Impact

Type the Cost Impact

c. Enter the **Schedule Impact** (Days) if applicable.

Schedule Impact

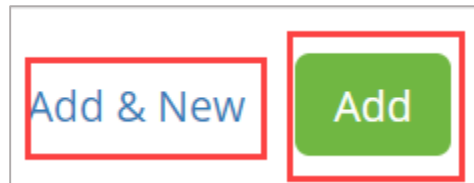
Type the Schedule Impact

d. Enter any applicable **Drawing Impact** information.

Drawing Impact

Type the Drawing Impact

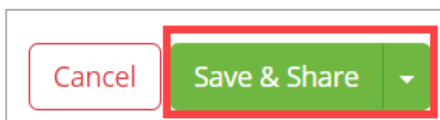
- e. Click **Add & New** to add another impact record or click **Add** to save this impact item and return to the Details page.



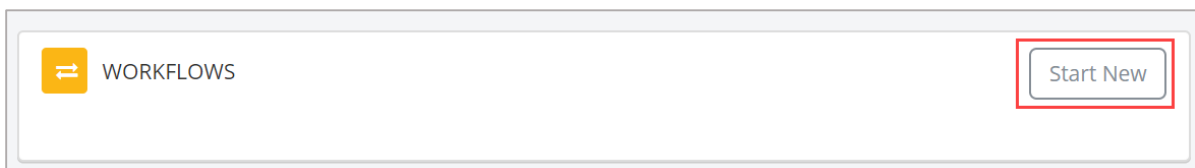
16. If there is a suggested solution, enter this in the **Suggestion** field.

A screenshot of a text input field. The label 'Suggestion' is at the top left. Below it, the placeholder text 'Type the Suggestion' is visible. The field is a light gray color with a small icon at the bottom right.

17. When you are ready to save the RFI, click the **Save & Share** button and share with the applicable groups or click **Save** to save the document without sharing.



18. Scroll to the **Workflow section** of the document and press the **Start New** button.



19. Click the **check box beside the applicable Request for Information workflow** and click the **Start Workflow** button. The workflow choices are listed below:

- a. RFI – To DGS PM – Submit RFI for Response (Sent to DGS Project Manager)

Start new workflow

Search...

	Workflow Name	Description
<input type="checkbox"/>	Request for Information to AE	Submit RFI for Response
<input checked="" type="checkbox"/>	Request for Information to DGS PM	Submit RFI for Response

Cancel Start Workflow

- b. RFI – to AE – Submit RFI for Response (Sent to Architect/Engineer for response)

Start new workflow

Search...

	Workflow Name	Description
<input checked="" type="checkbox"/>	Request for Information to AE	Submit RFI for Response
<input type="checkbox"/>	Request for Information to DGS PM	Submit RFI for Response

Cancel Start Workflow

Requesting Answer Clarification – Performed by the party who submitted the question.

1. Navigate to the RFI in the RFI log and click the **subject** to open the document.


Requests For Information shared with me

New Print

<input type="checkbox"/>	Subject	Created On	Shared	
<input type="checkbox"/>				
<input type="checkbox"/>	Pipe Size	4/25/19 1:26 PM	1	Edit
<input type="checkbox"/>	Gravel Size in Maintenance Yard	4/25/19 12:25 PM	1	Edit

2. Review the **Response** field to review the RFI answer.


Response Date
1/10/20

Response
Response Section 

Responding Company
DGS

Response By
John Harmon

3. If additional information is required, use the **Comments** feature located on the document page to request clarification from the responder. Clarification should be provided by the responder via editing the response field in the RFI.

 **ACTIVITY**

Comments **Activity**

Comment

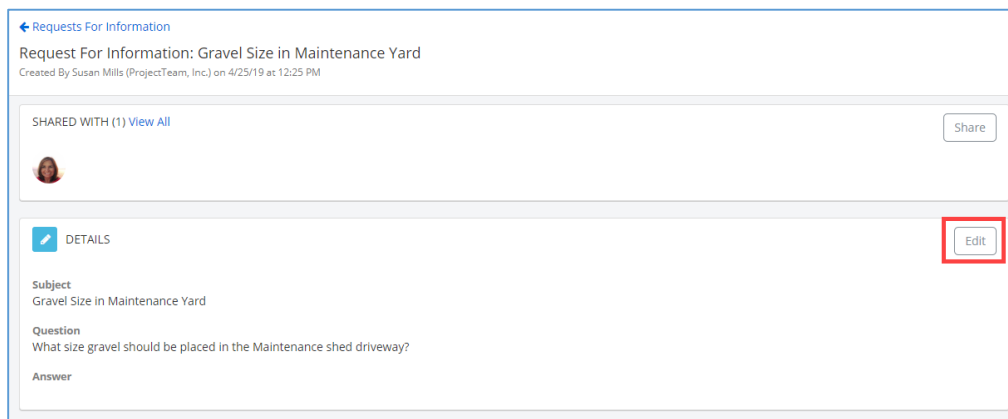
Post

Close an RFI – Performed by the party who submitted the question.

1. Navigate to the RFI in the RFI log and click the subject to open the document.

Requests For Information shared with me				New	Print	...
<input type="checkbox"/>	Subject	Created On	Shared			
<input type="checkbox"/>	Pipe Size	4/25/19 1:26 PM	1	Edit		
<input type="checkbox"/>	Gravel Size in Maintenance Yard	4/25/19 12:25 PM	1	Edit		

2. Click the **Edit** button in the Details section.




← Requests For Information


Request For Information: Gravel Size in Maintenance Yard

Created By Susan Mills (ProjectTeam, Inc.) on 4/25/19 at 12:25 PM

SHARED WITH (1) [View All](#)

Share



 DETAILS

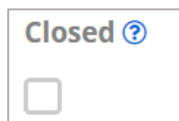
Subject
Gravel Size in Maintenance Yard

Question
What size gravel should be placed in the Maintenance shed driveway?

Answer

Edit

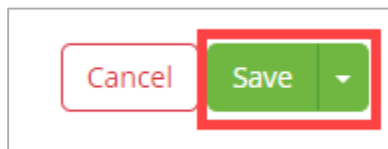
3. If the answer resolves the question, scroll to the bottom of the RFI and click the **Close** checkbox.



Closed ?

☐

4. When all changes are complete, click the **Save** button.



Cancel Save ▾