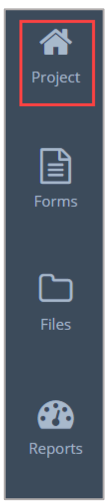
Request for Information

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.

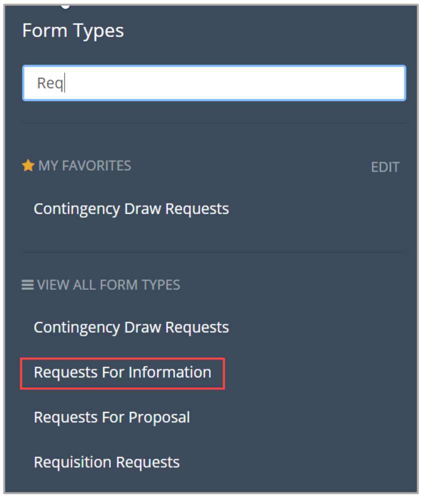
This document type is typically created by vendors. There are two structured workflows for this document and the RFI creator will initiate the appropriate workflow to submit the question to the relevant responder.

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.

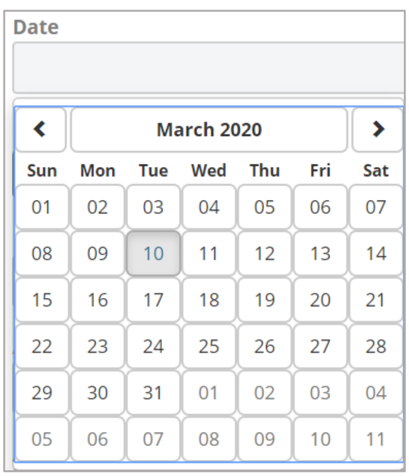


2. Begin typing **Req** and select **Request for Information**.



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

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

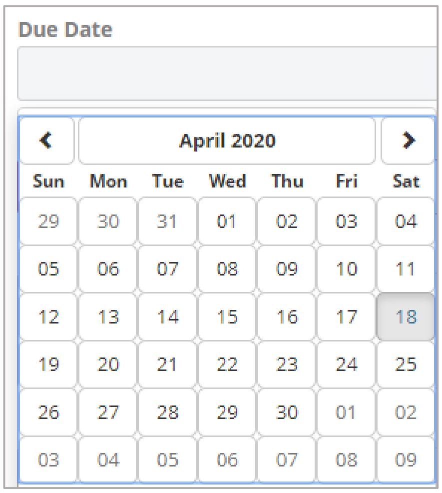


5. Click the **Get Next** button to add the **RFI Number**. This step will automatically number the RFIs in sequential order.

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

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

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



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

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

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

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

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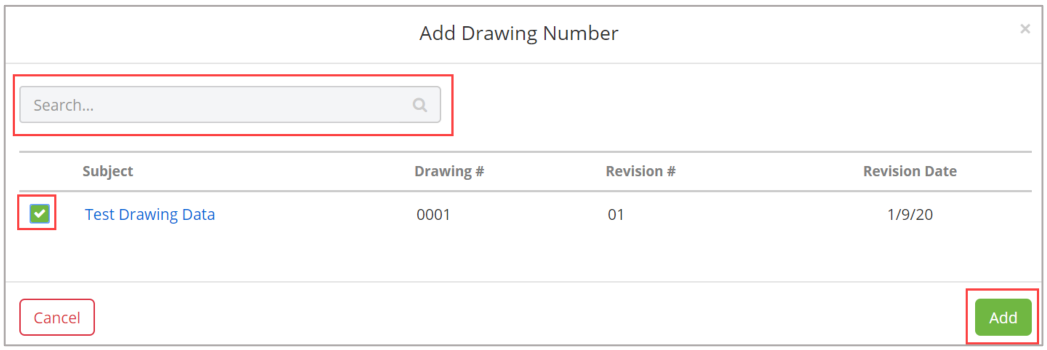
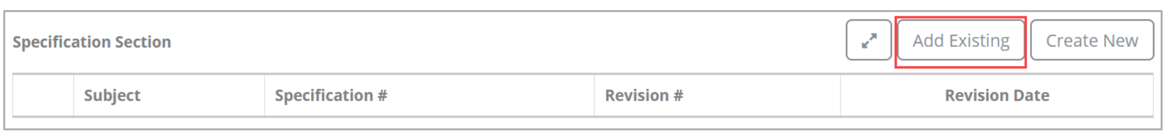
a. If you would like, use the **search** feature to find a specific drawing. Click the **checkbox(es) beside each drawing** you wish to add and click the **Add** button.

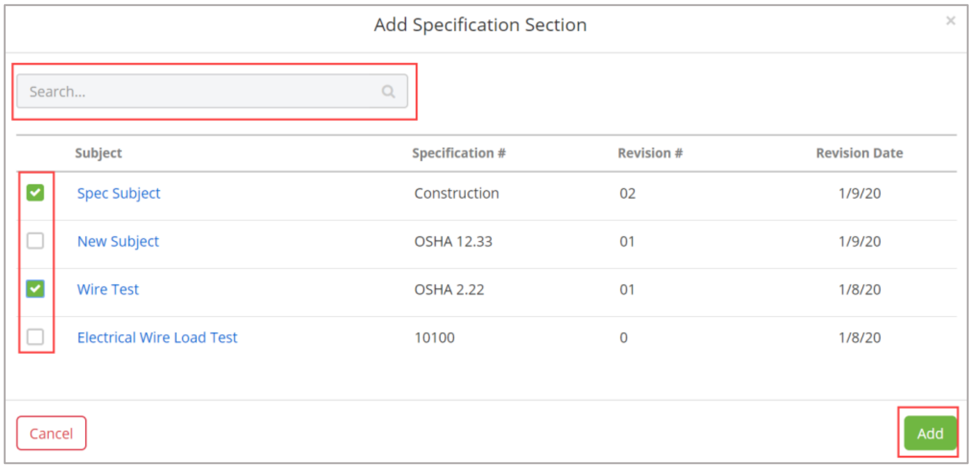


13. Enter the applicable **Column Line** information from the referenced drawing if you wish to provide a specific location pertaining to the RFI.

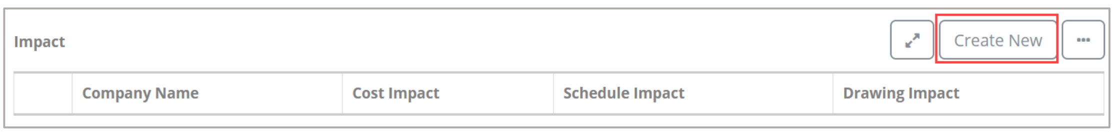
14. To add an existing specification, click the **Add Existing** button in the Specification Section table.



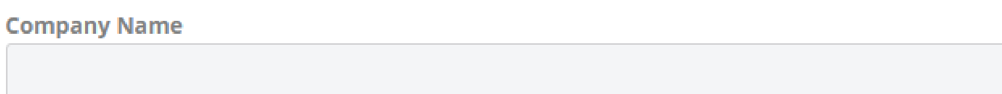
a. If you would like, use the search feature to find a specific specification. Click the **checkbox(es) beside each specification** you wish to add and click the **Add** button.



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



a. Enter the **Company Name**.

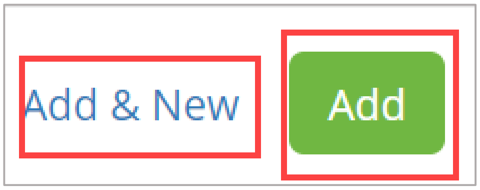


b. Enter the **Cost Impact** (Dollars) if applicable.

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

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

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



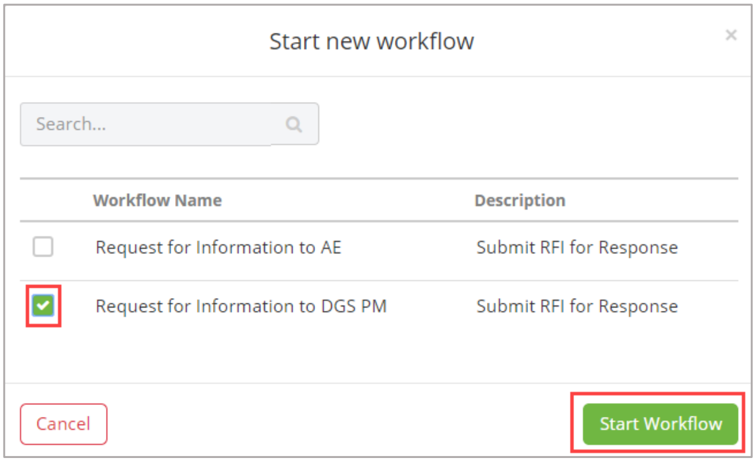
16. If there is a suggested solution, enter this in the **Suggestion** field.

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.

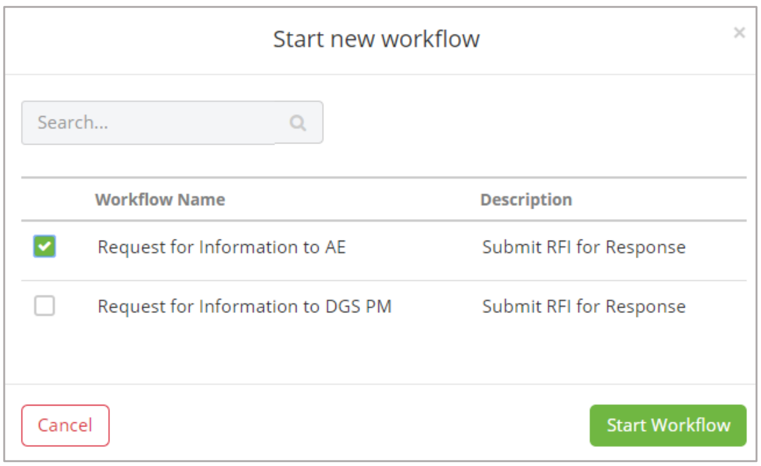
18. Scroll to the **Workflow section** of the document and press the **Start New** button.

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)

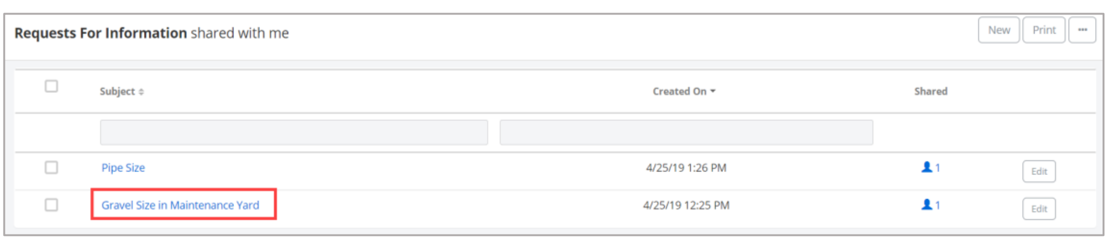


b. RFI – to AE – Submit RFI for Response (Sent to Architect/Engineer for response)



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.



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

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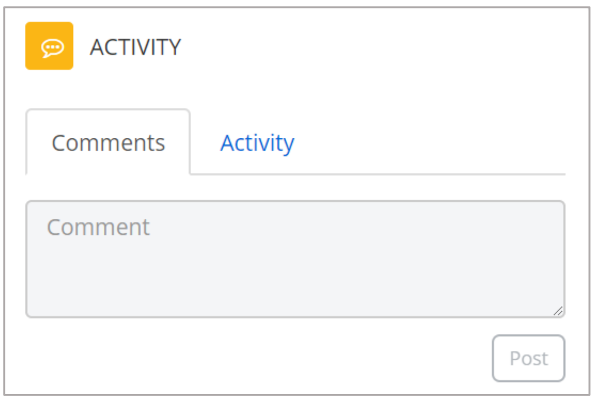
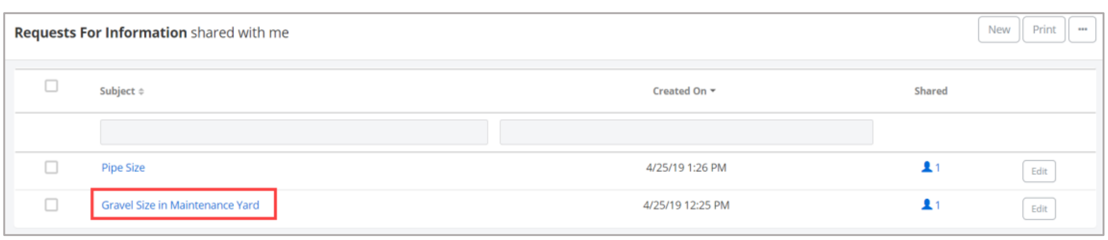
3. If additional information is required, use the **Comments** feature located on the document page to request clarification from the responder. Clarification should be provided by the responder via editing the response field in the RFI.



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.



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

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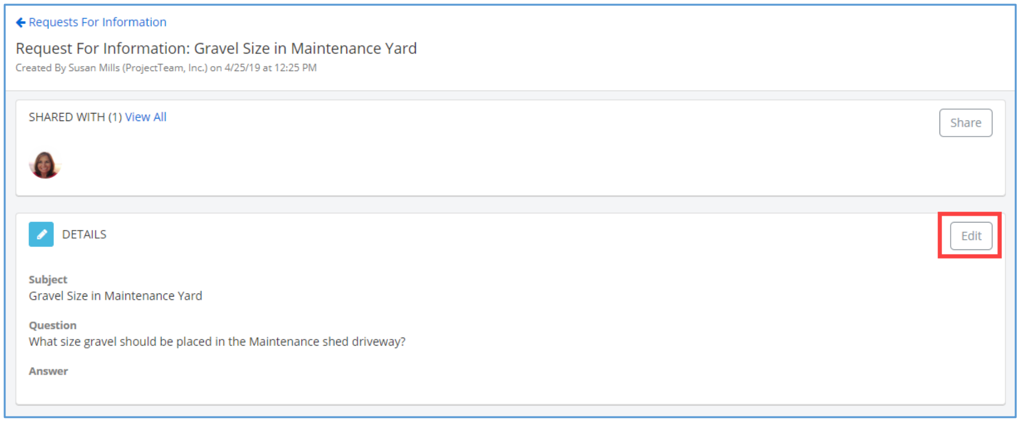
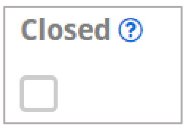


3. If the answer resolves the question, scroll to the bottom of the RFI and click the **Close** checkbox.



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