

Request for Information

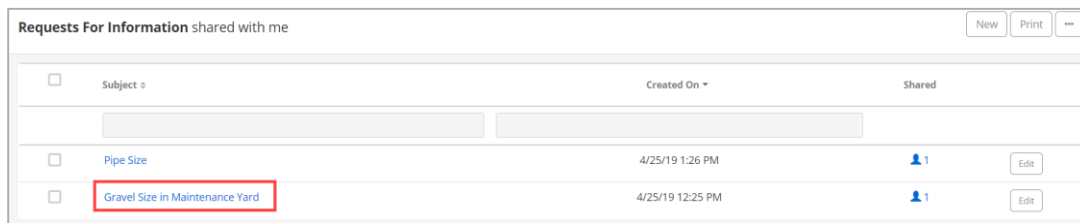
The purpose of an RFI is to collect written confirmation or clarification from the architect, contractor or client that is needed to continue work. RFIs are often necessary to confirm details on the project specifications or drawings.

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.

Responding to an RFI – performed by the party responsible for responding to the question.

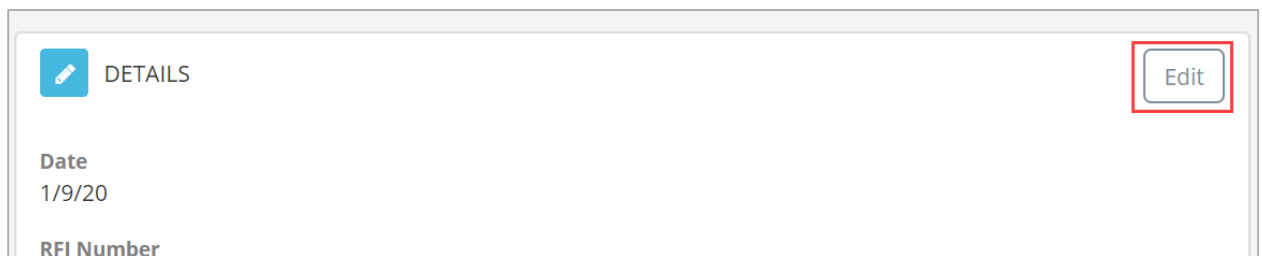
The designated responder identified in the workflow will receive a workflow notification via email. Click the link in the email to automatically open the RFI in ProjectTeam or log in to ProjectTeam and follow the instructions outlined above to locate the RFI in the log.


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** field.




DETAILS
Edit

Date
 1/9/20

RFI Number

3. If applicable or if this date differs from the RFI creation Date, add the **Date to Architect** field by clicking inside the field and selecting the date from the calendar utility.

Date to Architect

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

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

Response 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

5. Enter the **Response**.

Response

Type the Response

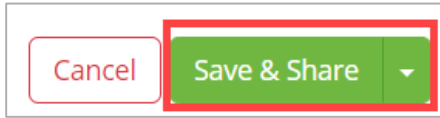
6. Click inside the **Responding Company** field and select the name of the company answering the RFI.

Responding Company

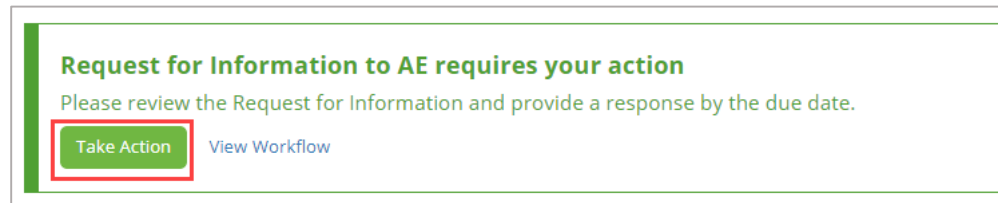
7. Click inside the **Response By** field and select the name of the responding contact.

Response By

8. When the response is complete, click the dropdown beside **Save & Share** and select **Save**.



9. Click the **checkbox** beside the **Request for Information workflow** and click the **Start Workflow** button. The workflow description is below:
- a. RFI – to AE – RFI Response Issued (Response sent to GC)



- b. Select **Pass** to close the RFI *workflow* once a response has been entered and enter "Response Provided in the Notes section. If you choose to stop the workflow, select **Cancel** and provide a reason in the Notes field. (For example, the RFI is erroneous or duplicative and a response is unnecessary).

A screenshot of a form section titled 'Your action'. It contains two radio button options: 'Pass' (with a green label) and 'Cancel' (with a red label). Below each option is a description: 'Mark as "Passed" and move forward to the next step' for 'Pass', and 'Mark as "Cancelled" and stop the workflow' for 'Cancel'. A red rectangular box highlights the 'Pass' radio button and its description. Below this is a 'Notes' section with a large text input field. A red rectangular box highlights the entire 'Notes' section. At the bottom of the form, there are two buttons: 'Cancel' on the left and 'Take Action' on the right. A red rectangular box highlights the 'Take Action' button.