Request for Information

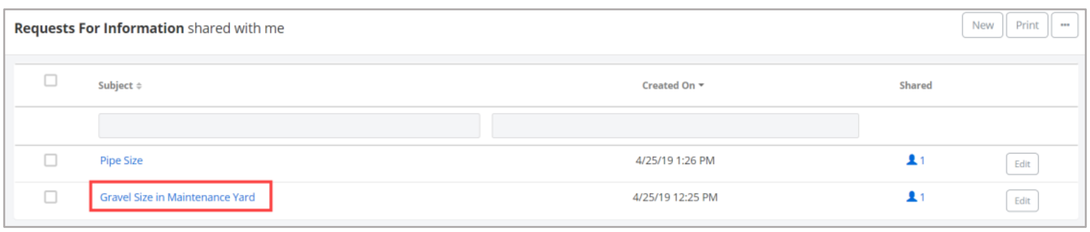
The purpose of an RFI is to collect written confirmation or clarification from the architect, contractor or client that is needed to continue work. RFIs are often necessary to confirm details on the project specifications or drawings.

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.

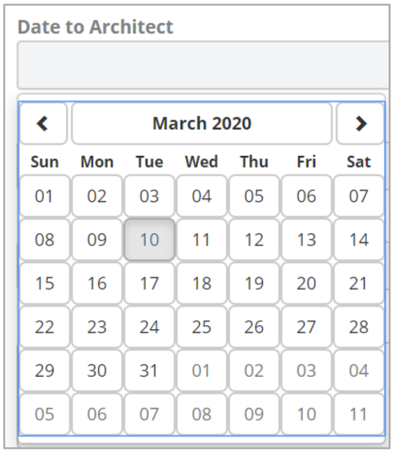
The designated responder identified in the workflow will receive a workflow notification via email. Click the link in the email to automatically open the RFI in ProjectTeam or log in to ProjectTeam and follow the instructions outlined above to locate the RFI in the log.

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

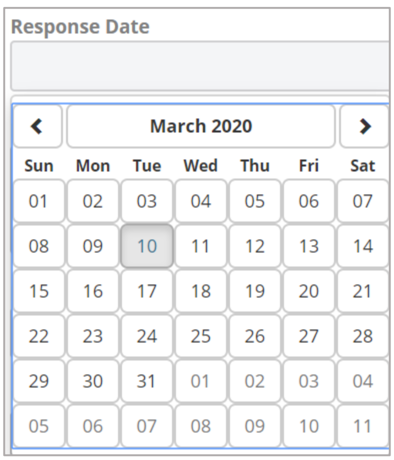


2. Click the **Edit** field.

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.



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



5. Enter the **Response**.

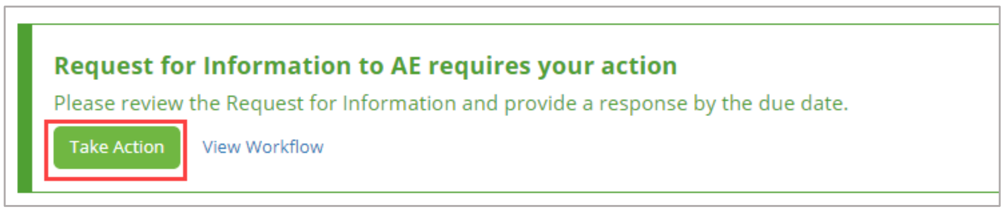
6. Click inside the **Responding Company** field and select the name of the company answering the RFI.

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

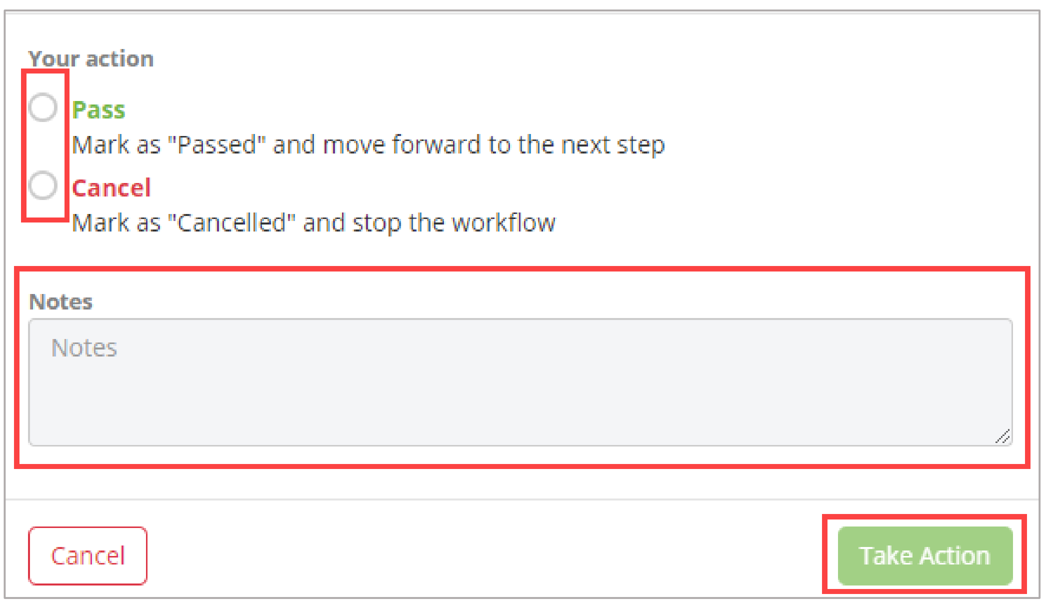
8. When the response is complete, click the dropdown beside **Save & Share** and select **Save**.

9. Click the **checkbox box 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 select **Cancel** and provide a reason in the Notes field. (For example, the RFI is erroneous or duplicative and a response is unneccessary).



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