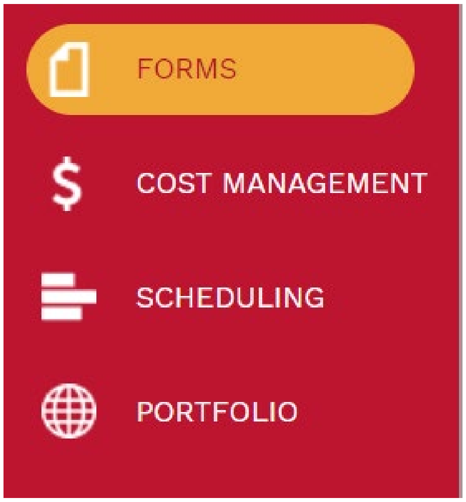
Vendor

Submitting an RFI

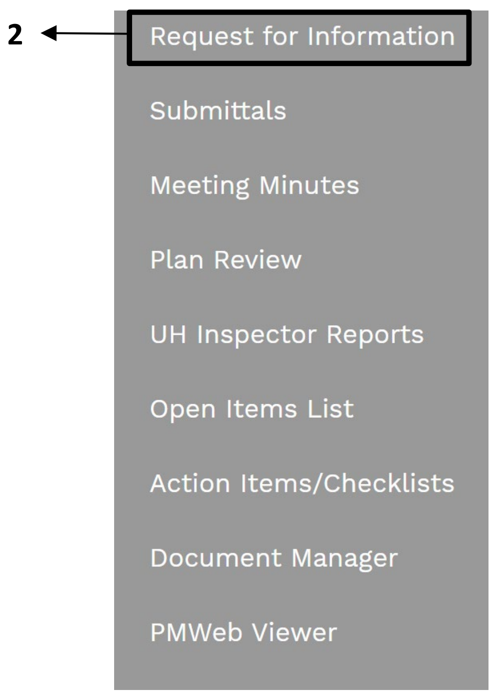
Overview: This guide outlines the process for a construction contractor to submit a Request for Information (RFI) for a project.

References: n/a

1- Click on **FORMS** from the buttons on the left.



2- Under Engineering Forms on the top left navigation pane, select **Request for Information**.



3- Click on **'+'** in the top bar. This will start a new record.

4- Project field - Select the project from the Project drop down menu. You can also start typing the name of your project in the field and it will come up.

5- RFI # field – first RFI enter 001 then will auto populate with next sequential number.

6- Description field - Enter a brief descriptive explanation of the request for information.

7- Reference field – Optional field.

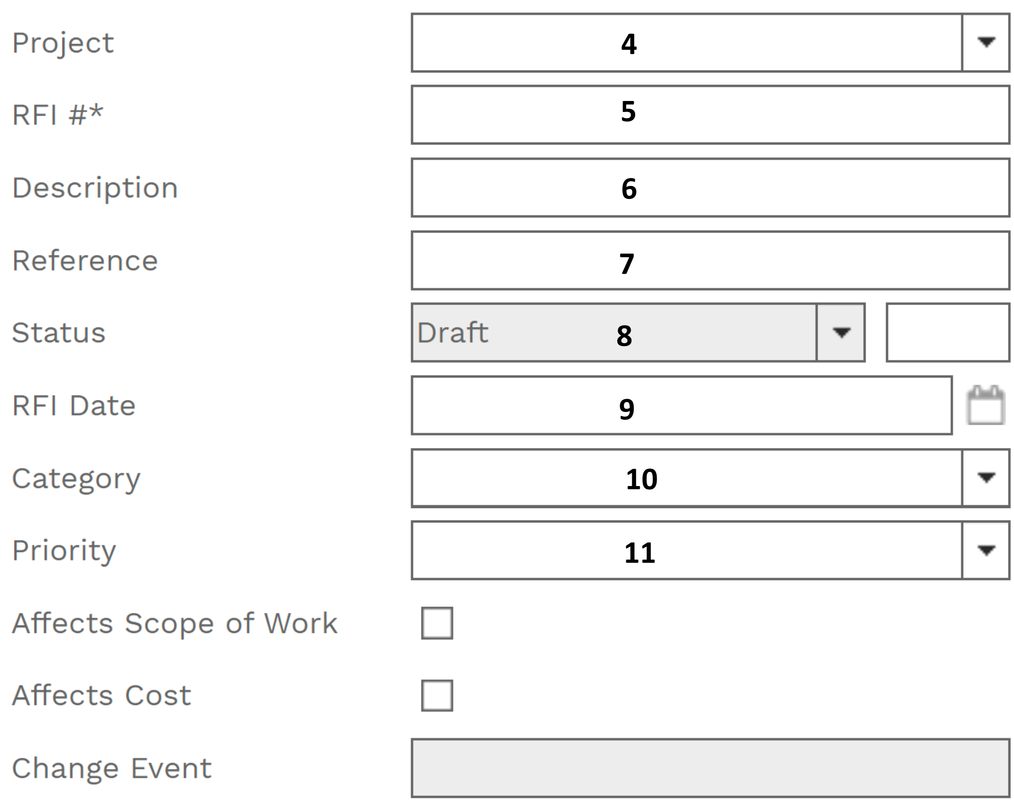
8- Status field – Shows current status.

9- RFI Date field – Optional Field. Internal Contractor RFI date for tracking purposes only. RFI's will be tracked in PMWeb solely by the "submitter date".

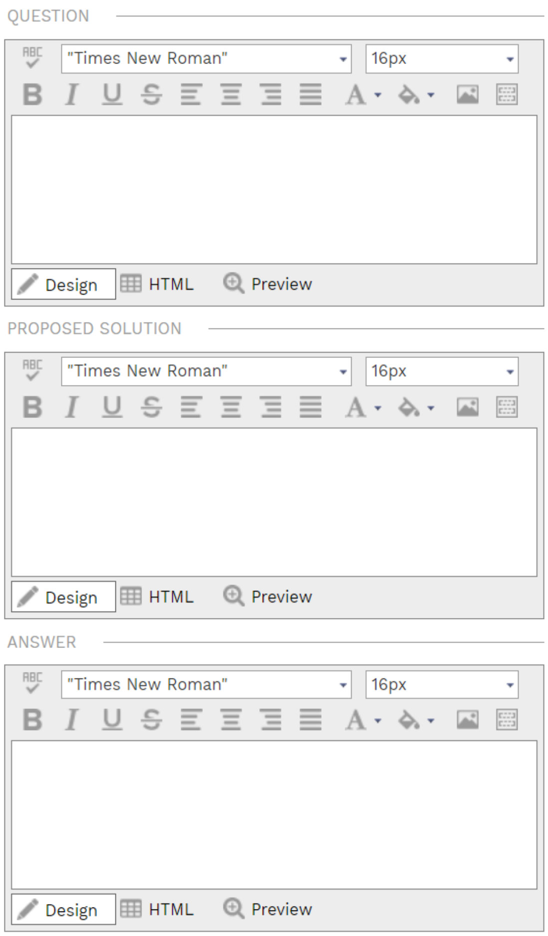
10- Category field – Select the appropriate category field under drop down.

11- Priority field – Optional field. Can select a priority field for preference (standard selection 03 - routine).

12- Click the save button on top bar to save header. (This step is important).

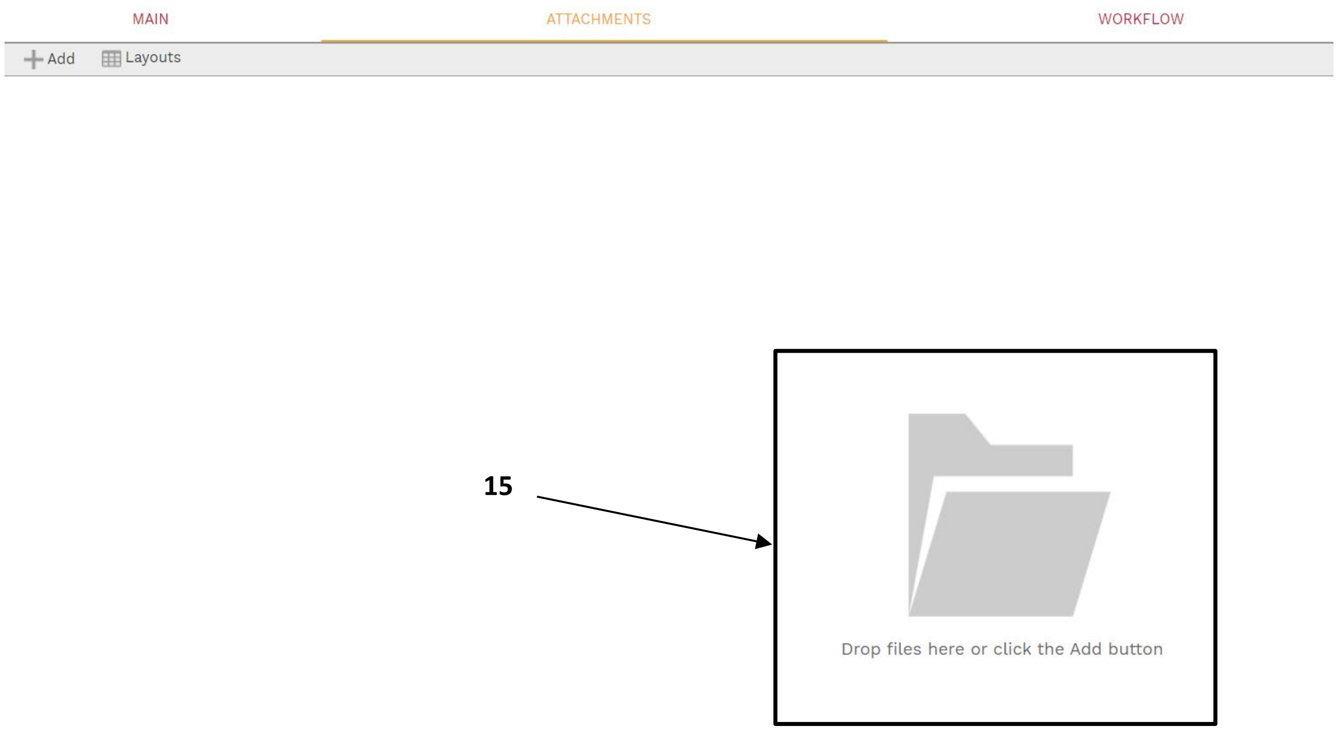


13- Enter the question and proposed solution (if applicable) in the "Question" box. Note, the reviewer will post their response in the "Answer" box.



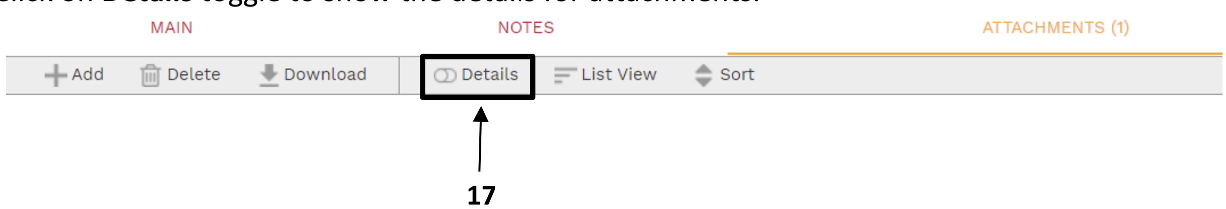
14- To add reference documents, select the '**Attachments**' tab at the top.

15- Add attachments by dragging them to the 'Drop files here' section.



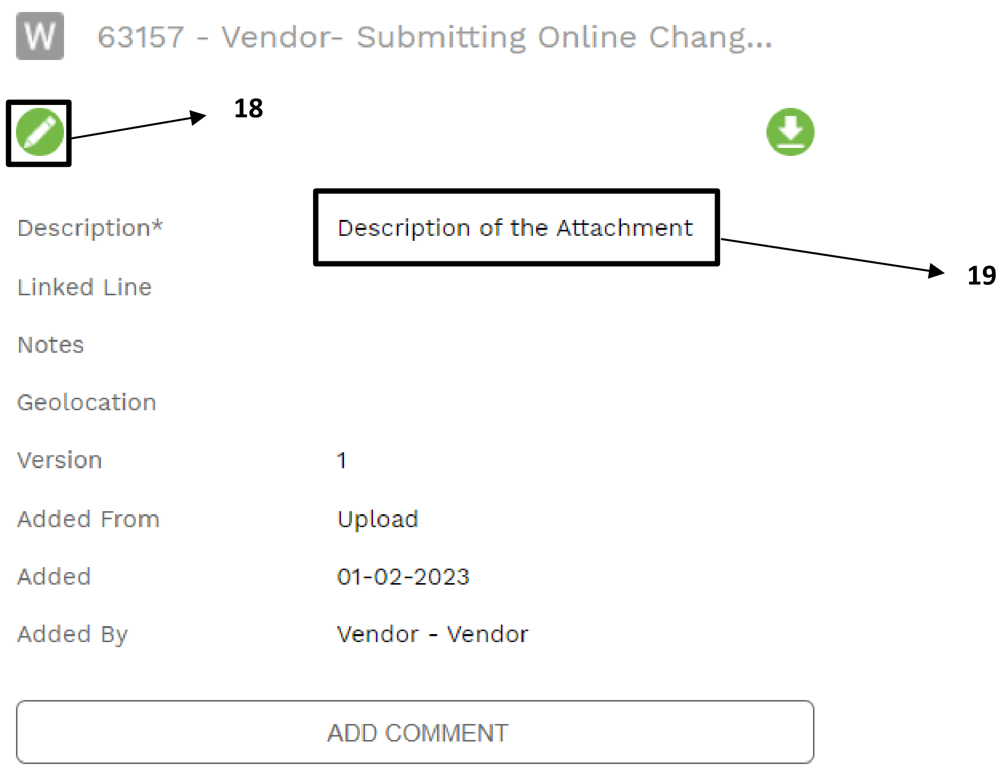
16- The description field autofills with the file name. Edit the description field to only include the description.

17- Click on **Details** toggle to show the details for attachments.



18- Review attachment details. Click on the 'Edit' icon to make edits

19- In the description field, provide a brief description of the attachment. Add notes or comments if needed.

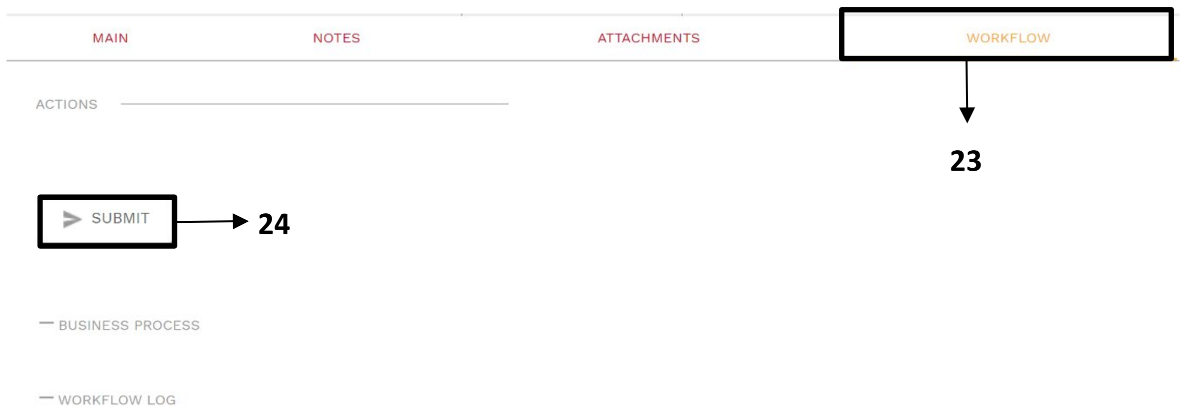


20- Click on the save icon.

21- Repeat the process for additional back up files.

22- Click the **Save** icon.

23- Select the '**Workflow**' tab at the bottom.
24- Click **submit** under "Workflow Actions".
25- Add **Comments** if applicable and click the **Save** button.



26- Select **Approve** and **Save.**