

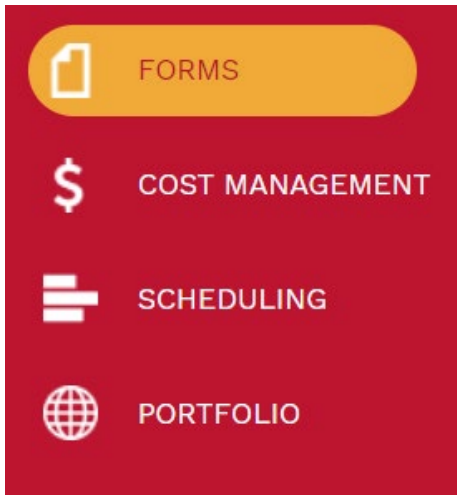
Vendor

Submitting an RFI

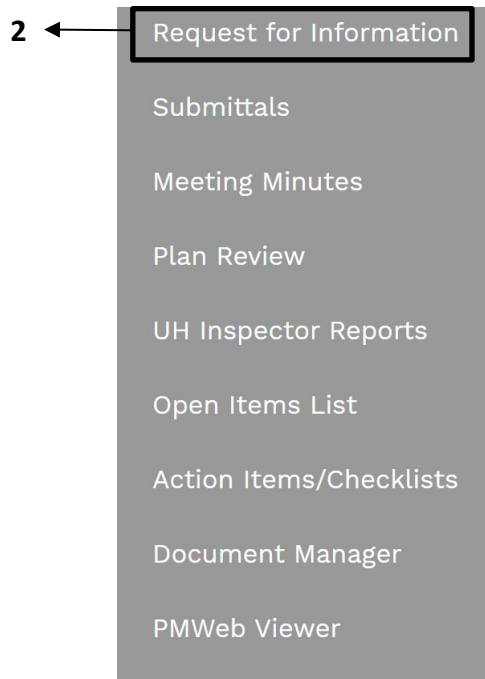
Overview: This guide outlines the process for a construction contractor to submit a Request for Information (RFI) for a project.



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).

Project	4	▼
RFI #*	5	
Description	6	
Reference	7	
Status	Draft 8	▼
RFI Date	9	
Category	10	▼
Priority	11	▼
Affects Scope of Work	<input type="checkbox"/>	
Affects Cost	<input type="checkbox"/>	
Change Event		

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

QUESTION

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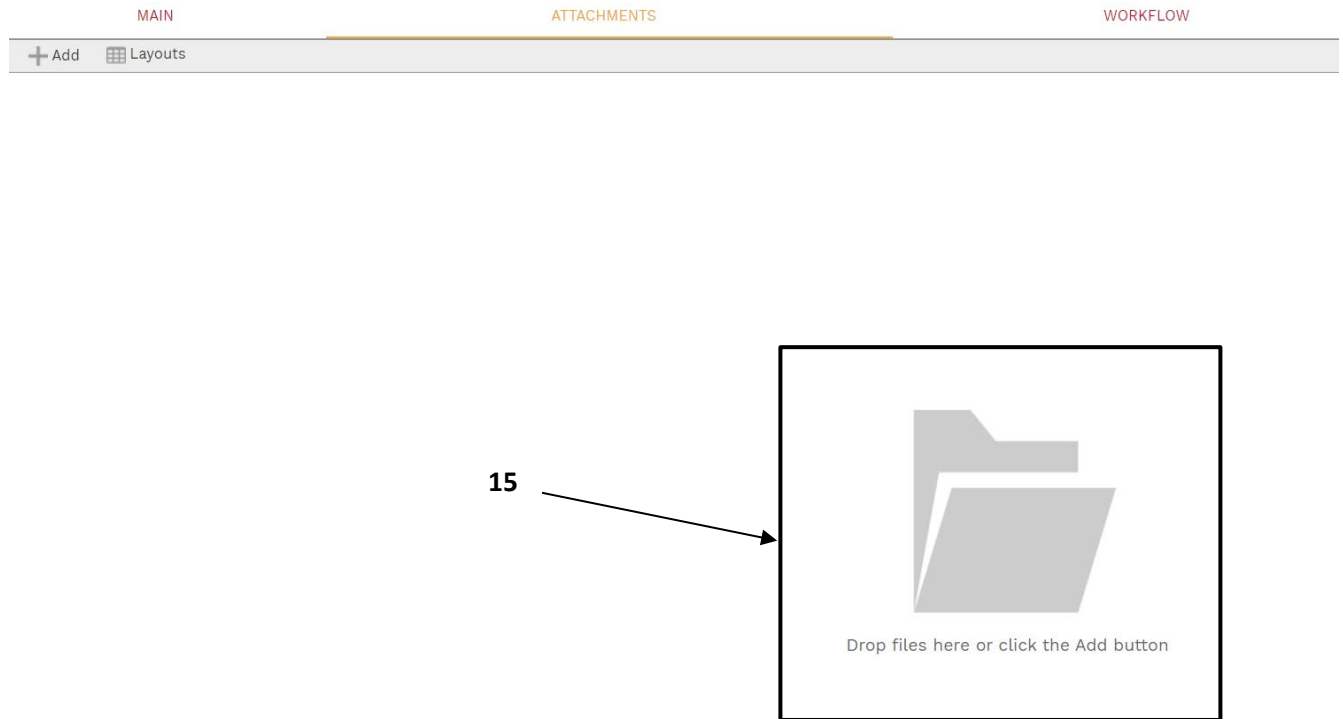
✎ Design

🔗 HTML

🔍 Preview

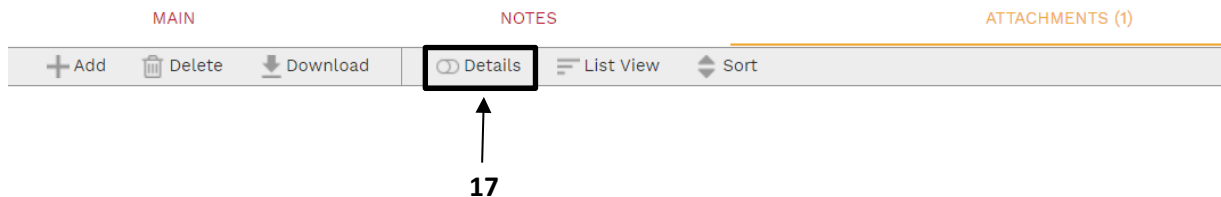
14- To add reference documents, select the '**Attachments**' tab at the top.

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.

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 **18** 

Description*

Description of the Attachment **19**

Linked Line

Notes

Geolocation

Version 1

Added From Upload

Added 01-02-2023

Added By Vendor - Vendor

ADD COMMENT

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.

The screenshot shows a software interface with a top navigation bar containing four tabs: 'MAIN', 'NOTES', 'ATTACHMENTS', and 'WORKFLOW'. The 'WORKFLOW' tab is highlighted with a black border and an arrow pointing down to the number '23'. Below the tabs is a section titled 'ACTIONS' with a horizontal line. Under 'ACTIONS', there is a 'SUBMIT' button with a right-pointing arrow next to it, which is pointed to by an arrow from the number '24'. Below the 'SUBMIT' button are two links: 'BUSINESS PROCESS' and 'WORKFLOW LOG'. At the bottom of the interface, there is a section titled 'ACTIONS' with a horizontal line, followed by a list of radio buttons: 'APPROVE', 'RETURN', 'REJECT', 'WITHDRAW', 'FINAL APPROVE', 'DELEGATE', and 'COMMENT'. Below the radio buttons are two buttons: 'SAVE' and 'DELETE WORKFLOW'. At the very bottom, there is a button labeled 'TEAM INPUT (0)'.

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

The screenshot shows the 'ACTIONS' section of the interface. It features a list of radio buttons: 'APPROVE', 'RETURN', 'REJECT', 'WITHDRAW', 'FINAL APPROVE', 'DELEGATE', and 'COMMENT'. Below the radio buttons are two buttons: 'SAVE' and 'DELETE WORKFLOW'. At the bottom, there is a button labeled 'TEAM INPUT (0)'.