

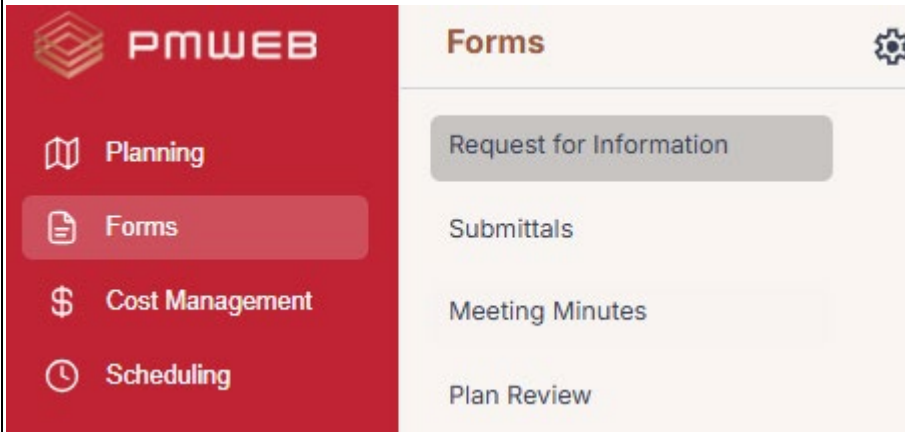
Vendor

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- Under **Forms**, click on **Request for Information**.



- 2- Click on **New Record** button to start a new record.
- 3- **Project*** field - Select the project from the Project drop down menu or type in the name of the project.
- 4- **RFI #*** field – this field will auto populate with next sequential RFI number.
- 5- **Description** field - Enter a brief descriptive explanation of the request for information.
- 6- **Reference** field – Optional field.
- 7- **Category** field – select a type of RFI ex. Architectural, Civil, IT, etc.
- 8- **RFI Date** – enter the date the RFI was created.
- 9- **Status** field – Shows current status of the record type.
- 10- **Revision** field – Optional. Enter the number revision
- 11- **Priority** field – enter the level of priority for the RFI.

Header Fields

Project*	3	RFI #*	4	Description	5	Reference	6	Category	7
RFI Date	8	Status	9	Revision	10	Priority	11	Change Event	

☐ Affects Scope of Work ☐ Affects Cost ☐ Affects Schedule

- 12- Enter the Question, the Proposed solution, and the Answer.

Details

Question

Inter 14px B I U A HTML

Proposed Solution

Inter 14px B I U A HTML

Answer

Inter 14px B I U A HTML

13- To add reference documents, select the 'Attachments' tab.

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

Main Notes Attachments Notifications

No attachments found

Select files... Drop files here to upload

Add From Document Manager

Link PMWEB Record

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

16- Review attachment details. Click on the 'three dot' icon to make edits

Thumbnail	PMWEB Vi...	ID	:	Size	:	Version
		456850		12.96 KB		1

17- Click on the save icon and repeat process for any additional back up files.

18- Click the **Submit** button in the top right corner.

19- Add **Comments** if applicable and click the **Next** button. DO NOT ADD ATTACHMENTS HERE

The screenshot displays the 'PMWeb Test - PMWeb Project Test' interface. A 'Submit Record' dialog box is open in the center, featuring the following sections:

- Business Process:** RFI (with a 'View Workflow' link)
- Email Details:**
 - Additional CC:** (empty text field)
 - Email Subject:** PMWeb Project Test: Request for Information 002 - test has been Submitted (pre-filled)
 - Comments:** (large empty text area)
- Attachments:** (empty area with a 'Select files...' button and a 'Drop files here to upload' instruction)

At the bottom of the dialog are 'Cancel' and 'Next' buttons. The background interface shows a 'Request for Information' form with tabs for 'Main', 'Notes', 'Attachments' (highlighted with a '1' icon), and 'Notifications'. A table of attachments is visible, showing a file named 'TEST.docx' with a size of 12.96 KB and a version of 1. The 'Submit' button is located in the top right corner of the main interface.

20- Click the **Submit** button.

21- **PROCESS COMPLETE**