# **RFI Quick Reference Guide**

This topic provides a reference for the Project Center **RFI** activity center.

## Purpose

The **RFI** activity center enables you to effectively log and track RFIs through their approval process.

### Audience

Architects, engineers, construction professionals, and owners.

# Key Features

- Streamline RFI management.
- Manage construction-related project information.
- Capture and connect interrelated contract management work processes.

### **Received RFI Workflow**

The following workflow options are available for tracking received RFIs in the project. Not all steps have to be used.



### To log a received RFI from email

You can log a received RFI directly from an email message.

1. Highlight the email, select the drop down arrow by File in Project and then select File As.

File	Ìn	Synchronize File Transfers	- 🚇
Proje	_	» More •	4
		tions 🕨	RE:
-	Fil	e as	Т

- 2. In the Select Project dialog box, double-click on the corresponding project to select it.
- 3. In the **File As dialog box**, select the **New Item** radio button and **RFI** from the **Project Item Type** list to log a new RFI. Complete the information in the **Log a Received RFI dialog box** as needed and select **OK**.

#### To log a received RFI from Info Exchange

External users can be given access to your Info Exchange site so they can send you RFIs directly from the site.

See the **Project Team Overview** for more information on granting external users access to Info Exchange.

- 1. You will receive an email notification that a RFI has been sent to you through Info Exchange. Follow the link in the email to the **RFIs** activity center.
- 2. Select Receive Pending RFI from the Tasks panel.

   TASKS

   RFIS ALPENGROVE ENVIRONMENTAL SCIENCE CENTER (199900

   Selected RFI

   Receive Pending RFI
   Pending Incoming (1)

   Add Similar RFI
   View Form

   Send email about RFI
   RFI 4500

   RFI 4500
- 3. Complete the information in the Log a Received RFI dialog box as needed and select OK.

#### To log a received RFI from the RFI activity center

You can also log a received RFI directly through the activity center. This is how you log documents received in hard copy or messages received via phone or fax.

Download or scan files needed before logging the RFI.

1. In the **RFIs** activity center, select **New RFI > Log Received RFI** from the **Tasks** panel.



- 2. Complete the information in the Log a Received RFI dialog box as needed.
- 3. Use the **Description of Contents** tab to track physical samples and items.

Remarks	Description of Contents (1)		Received Files (0)	Email Log (0)	Supporting Documents (0)		(0)
Import	Edit in Spreadsheet				Pop	ulate from Received	d Files
🔲 Qty	Date	Numbe	er Description	Action		Remarks	
🗖 1 M	lay 28, 2014		lighting sample	5	•	at front desk	

4. You can add scanned files or files downloaded from another site to the Received Files tab.

🔁 Alpeng	rove - A102.pdf	Adobe	Acrobat Doc	1,673	KB 5/15/2014 10	):46:41 AM	\\newfo\inc
Name		Туре		Size	Date Modifi	ed	Path
						Views 🔻	Add Files
Remarks	emarks Description of Contents (1)		Received File	es (1)	Email Log (0)	Supporti	ng Documents

#### To forward an RFI for review

RFIs can be forwarded for review to multiple internal and external reviewers.

1. In the **RFIs** activity center, highlight the RFI and select **Forward for Review** from the **Tasks** panel.

TASKS	F	RFIS - ALPENG	ROVE ENVIRONM	ENTAL SCIENCE
Selected RFI Modify	4	All (19)		•
Forward for Review	- 11	ID 🔻	Subject	Status
Record Reviewer Response		T	T T	Ŧ
Close	•	🗄 RFI-0406 🖕	Metal Standin	Open
Send		🗄 RFI-405	ounting Deta	Open

2. Select any files to send to the reviewers in the Select Files to Forward for Review dialog box and select OK.

Internal reviewers will see all associated files when they view the RFI through the **RFI** activity center so forwarding files may not be necessary.

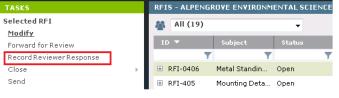
3. Complete the information in the Forward RFI for Review dialog box as needed.

If you choose to send via email, Newforma prepares a notification email. Look for the Microsoft Outlook icon flashing in the Windows toolbar indicating the email is ready to send.

#### To record a reviewer response in the RFI activity center

Reviewers' responses can be recorded in the **RFI** activity center from email or from a response sent through Info Exchange.

1. In the **RFIs** activity center, highlight the RFI and select **Record Reviewer Response** from the **Tasks** panel.



2. Record your comments in the **Response** box on the **Response** tab.

Response	Description of Contents (1) A	ssociated Files (0) E	Email Log (0)
Summary:	Created by:		
	Forwarded to: Remarks:	testens tertes	
Response:	B I U S Verdana	• 10 • <u>A</u> • <i>f f</i> ,	\$≡ !⊒   <b>■</b>

3. Add any files to the Associated Files tab.

Response	Description of C	Associated	Email Log (0)			
Transferred F	iles	[	Views 🔻	Add Fil	es	Add F
Name		Туре		Size	Date	Modified
🔁 0408a23-	Marked up.pdf	Adobe Ad	probat Doc	599 KB	4/30/2	014 2:41

4. Select Record Response to save your changes.

#### To record a reviewer response from email

When a reviewer responds to a RFI via email, you can record the response directly from Outlook.

 In Outlook, highlight the email you want to log as a reviewer response, then select the drop-down arrow for the File in Project button in the Project Center Add-In for Microsoft Outlook toolbar. Select File As from the



- 2. In the Select Project dialog box, double-click on the corresponding project to select it.
- In the File As dialog box, select Reviewer Response and select RFI as the Project Item Type to pick from the list of expected RFIs in the Choose Project Item dialog box. Complete the information in the Record

🐣 Choose Project	Item		
Look in: 📑 RF	Is	•	
Select Item			
🆓 Open (9	))	•	
ID 🔻	Subject	Status	Discipline
1	T T	T	T
RFI-0407	testing on Har	Open	
RFI-403	Site Plan Revi	Open - Overdue	Civil Site
RFI-357	Corridor 59 an	Open - Overdue	Architectural, H

#### Reviewer Response for RFI dialog box as needed.

#### To record a reviewer response from Info Exchange

Reviewers can respond to a RFI through Info Exchange. You will receive an email notifying you of the sent response.

1. In the RFIs activity center, select Pending Incoming from the category drop-down list. Highlight the

а	appropriate RFI and select Receive Pending Review Response in the Tasks panel.							
	TASKS		RFIS - ALPENGROVE ENVIRONMENTAL SCIENCE CENTER (1999009.00)					
	Selected RFI Receive Pending Review		🎊 Pending	Incoming (2)	-			
	Response	- 1	ID 🔻	Sender ID	Subject	Status		
Γ	Modify	- 1		Y	T T		T	
	Forward for Review	- 1	🗄 RFI - 450	L	revised conf	Open		
	Record Reviewer Response	_	÷	RFI - 4500	revised conf	Pending		
	Close	- • •				_		

2. Complete the information in the Record Reviewer Response for RFI dialog box as needed.

#### To respond and close

Use this option to track your response to the RFI and close it within Newforma.

1. <u>In the **RFIs** activity center, highlight the RFI and select **Close > Respond and Close** from the **Tasks** panel.</u>

TASKS	RFIS - ALPENGROVE E
Selected RFI	8 Open (10)
Modify	-
Forward for Review	ID 🔻 Subj
Record Reviewer Response	<b>T</b>
Close	Close
Send	Respond and Close
Add Similar RFI	Send and Close

2. In the **Select Files to Send dialog box**, select any files you want to send with the response. Any files included in a reviewer response are selected by default. Select **OK**.



3. Complete the information in the **Respond to RFI and Close dialog box**. You can use the response widget to copy a full summary of the RFI activity or just a summary of the reviewer responses in the **Response** field.

b Respond to RFI and	l Close							
To:	Bob Welder -	≤bwelder@r	macdougall.com	<u>(&lt;</u>	^ 	Transmittal ID: RFI ID: Sender ID:	Auto Number RFI-097 RFI-097	
CC:								
From:	Howard Roar	< <hroark@< td=""><td>ima.com&gt;</td><td></td><td></td><td></td><td></td><td></td></hroark@<>	ima.com>					
Subject:	RFI-097 - Ent	rance Floor	Mats					
Action:	Required			•	🔄 Hide	e recipient list 🏾 🌔	)	
Date:	Thursday ,	June	05, 2014					
Send Via:	Email			•				
	🔄 Log In Doo	ument Con	itrol 🕕					
Summary: Re	escription of Conte eceived from: Bo uestion: oward		Associated Fil (MacDougall C		Email L on)	og (0) Relate	d Items (0)	Change Log
Summary: R Q Hi Tł	eceived from: Ba	<b>b Welder</b> are standa	(MacDougall C	Constructi	<b>on)</b> / the Cle	ean Uniform com	ipany. These r	nats are a
Summary: R Q Hi Tł	eceived from: Bo uestion: oward, ne entrance mats ree standing produ	<b>b Welder</b> are standa	(MacDougall C	constructi e made by alls for ma	on) y the Cle its reces	ean Uniform com	ipany. These r e. Should the n	nats are a nats be free

4. Select **Create** to close the RFI and create the response.

# Initiate RFI Workflow

The following workflow options are available for tracking RFIs that you initiate for the project. Not all steps have to be used.



### To create an RFI from the RFIs activity center

You can log and track RFIs you create directly through the activity center.

1. In the RFIs activity center, select New RFI > Create RFI.



2. Enter any information as needed in the **Create RFI dialog box**. Use the **Question** tab for the content of your question and the **Supporting Documents** tab for any files.

🖰 Create RFI			
Subject:	Required		
Due Date:	No Due Date	ID:	Auto Number
	Remind 2 days before due 🚺		
Type:	Construction -	Reasons:	
Originated By:		Discipline:	
Status:	Draft 👻	Contract:	None
Question	Description of Contents (0) Email Log (0)	Support	ing Documents (0) Related Items 🔸 📩
<b>в</b> I <u>U</u> <del>(</del>	S Verdana $\checkmark$ 10 $\checkmark$ $\underline{A} \checkmark f f_{\ast}$	i i i i	= 두 편 편 💷 🚷 📑 🍋 🍦
Suggestion:			

3. Select **OK** to create the RFI.

The new RFI is listed in a Draft state until it is forwarded or closed.

#### To close an RFI

After sending the RFI for review and recording the reviewer's response as needed, you can log the answer and close the RFI in Newforma.

1. In the **RFI** activity center, highlight the RFI and select **Close > Close** from the **Tasks** panel.

TASKS	RFIS - ALPENGROVE E
Selected RFI	88 Open (10)
Modify	
Forward for Review	ID 🔻 Subj
Record Reviewer Response	<b>T</b>
Close	Close
Send	Respond and Close
Add Similar RFI	Send and Close

2. Complete the information in the **Close RFI dialog box**. You can use the response widget to copy a full summary of the RFI activity or just a summary of the reviewer responses in the **Response** field.

🖰 Close RFI								
Closed By:	Paul Philips Statistics - 1	and the second						
Team Members:								
Date:	Thursday , June 05, 2	:014						
Action:	Void	•						
Remarks As	sociated Files Email Log (	(0) Related Items (0)						
Summary:         Received from: Bob Welder (MacDougall Construction)         Question:         See the enclosed marked up site plans showing some of the difficulties in accommodating ADA access to the south entrance to the building. Please advise. As the discussions involving the coordination of the ComEd route from the new feed thru transformers south of the TEC building have evolved, there have been different.         Image: B I make the Verdana       10       A + f f_r $i = i = i = i = i = i$ Review Summary       Full Summary								

3. Select **OK** to close the RFI.

### To send and close an RFI

Use this option to track your response to the RFI and close it within Newforma.

1. In the **RFIs** activity center, highlight the submittal and select **Close > Respond and Close** from the **Tasks** 



2. In the Select Files to Send dialog box, select any files you want to send with the response. Any files included

in a reviewer response are selected by default. Select OK.



3. Complete the information in the **Respond to RFI and Close dialog box**. You can use the response widget to copy a full summary of the RFI activity or just a summary of the reviewer responses in the **Response** field.

🐣 Respond to RFI and Clo	ise				- • •					
To:	Bob Welder <bwelder@macdougall.com>;</bwelder@macdougall.com>	*	Transmittal ID: RFI ID: Sender ID:	Auto Number RFI-097 RFI-097						
CC:										
From:	Howard Roark <hroark@ima.com> RFI-097 - Entrance Floor Mats Required</hroark@ima.com>									
Subject:										
Action:										
Date:	Thursday , June 05, 2014 🔲 🗸									
Send Via:	Email									
	Log In Document Control 👔									
Response Descr	ription of Contents (0) Associated Files (0) 6	Email Lo	og (0) Related	i Items (0)	Change Log					
Quest										
	The entrance mats are standard type and size made by the Clean Uniform company. These mats are a free standing products. however, the spec calls for mats recessed into a frame. Should the mats be free 💌									
icosponse.	I ∐ S Verdana ▼ 10 ▼ A ▼ j wiew Summary III Summary	f f. (	= =   = =	ㅋ 웹 텔	■ &   ]					
Keywords:										
🗛 sfter filing 🔲 Cre	ate Related: Action Item	Ţ	Create	Cancel	Help					

4. Select **Create** to close the RFI and create the response.

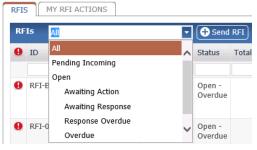
#### To view RFIs on Info Exchange

Internal and external users can see the **RFIs log** on Info Exchange. By default, external users only see items in the workflow that they sent or received.

1. Log into the Info Exchange website and select the project, then select View > Contract Management > RFIs.

MY PROJECTS DIRECTORY - PROJECT HOME SEND -	VIEW - HELP -		
	Files and Documents	Field Management	Contract Management
Shortcuts	File Transfers	📝 Field Notes	🚱 Cost Codes
Send	Shared Folders	Daily Reports	👂 Submittals
	Document Sets	Site Visits	🔮 RFIs
G Files	Document Control	🛐 Punch List	Bulletins

2. You can use the **RFIs** category drop-down list to filter the list of RFIs by status.



3. You can view the workflow for any RFI.

RF	Is 🗚	UI II			- 🕀 Sen	d RFI						🖪 Expo	rt 👻
0	ID	. Si	ender ID Si	ubject	Status	Total Days	Received		Forwarded	_	Response	Closed	Suppor
						7		• 7		• 7		r 🗖 🤉	e e
	RFI-00	2	10	onference om 1202 elling finish	Closed	-77						5/17/2012 Answered  Closed by: Adam Klose (Jefferson Mill Associates)	2 files
0	RFI-09	1		zbar. gmentation	Draft - Overdue	236							1 file
	RFI-09	7 R	E	E1-097 - htrance Eloor ats	Closed	11	5/24/2012 Information From: Bob Welder ( Construction)		5/26/2012 Answer	То	6/1/2012 Answered From Lae Hori (HEP Designs Inc.)	6/3/2012 No Action Taken Gosed by: Howard Roark (Defferson Mil Associates)	**

4. When you need to access the data in different formats you can export to a variety of file formats from the

