

## Request for Information

[Create and RFI](#)

[Respond to and RFI](#)

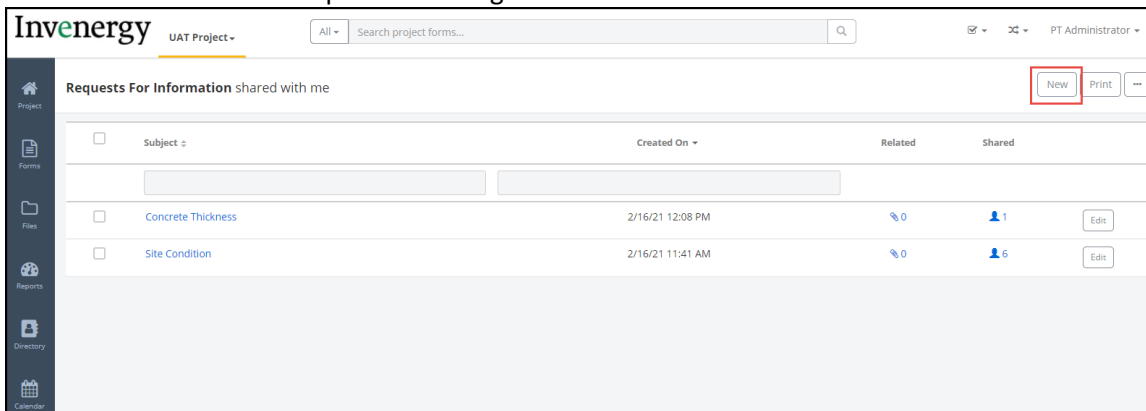
[Close an RFI](#)

[Reference a Document in the RFI](#)

[Add Attachments to RFIs](#)

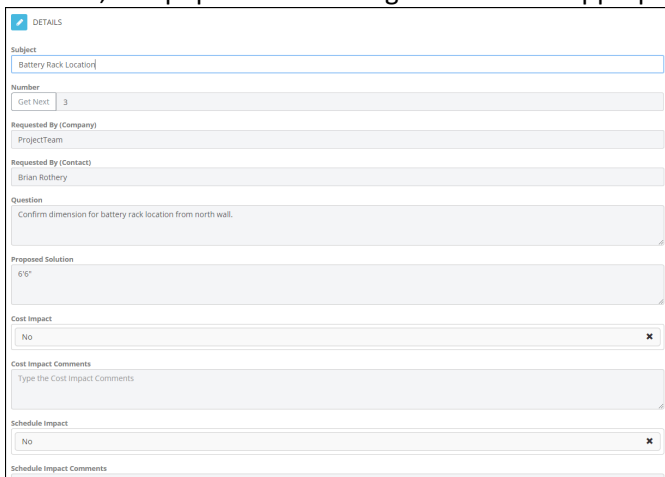
### Creating a New RFI and Initiating Workflow

1. Navigate to the RFI log within a project.
2. Click the **New** button on top of the RFI log.



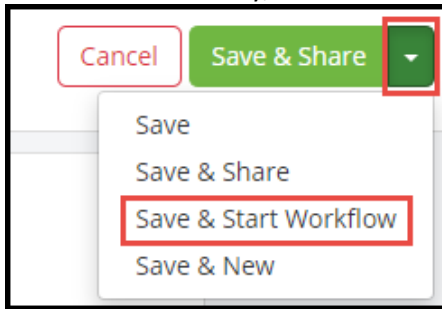
The screenshot shows the Invenenergy web application interface. At the top, there's a header with the Invenenergy logo, a dropdown for 'UAT Project', a search bar, and user information 'PT Administrator'. Below the header, a sidebar on the left contains icons for Project, Forms, Files, Reports, Directory, and Calendar. The main content area is titled 'Requests For Information shared with me'. At the top right of this area, there are buttons for 'New', 'Print', and a menu icon. The 'New' button is highlighted with a red box. Below the buttons is a table with columns: Subject, Created On, Related, and Shared. The table contains two entries: 'Concrete Thickness' and 'Site Condition'. Each entry has an 'Edit' button next to it.

3. Provide a subject that uniquely identifies this RFI, click 'Get Next' to auto populate the next RFI number, and populate remaining data fields as appropriate.

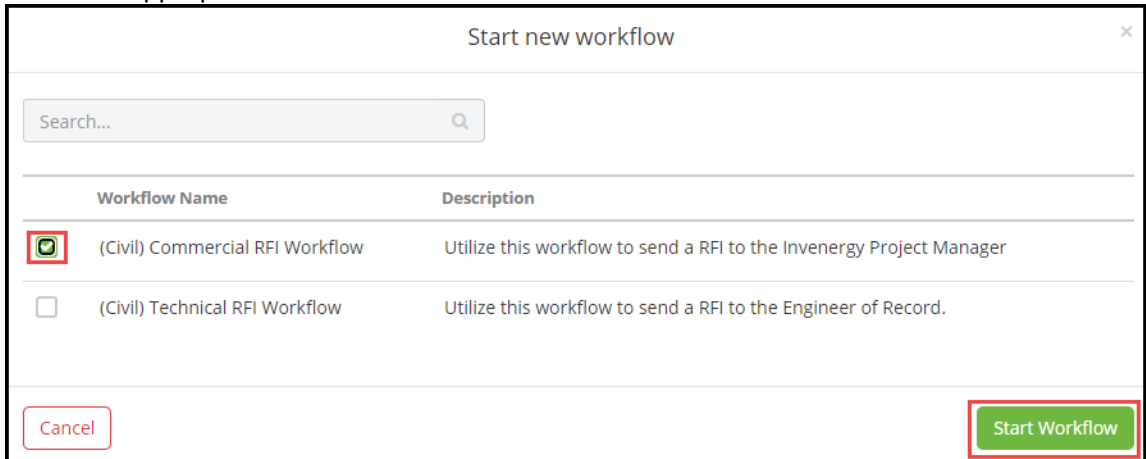


The screenshot shows the 'DETAILS' form for creating a new RFI. The form has several sections: 'Subject' with a text input field containing 'Battery Rack Location'; 'Number' with a dropdown menu showing '3'; 'Requested By (Company)' with a dropdown menu showing 'ProjectTeam'; 'Requested By (Contact)' with a dropdown menu showing 'Brian Rothery'; 'Question' with a text input field containing 'Confirm dimension for battery rack location from north wall.'; 'Proposed Solution' with a text input field containing '6\"

4. With the RFI ready to submit, click the arrow next to the Save & Share button and choose **Save & Start Workflow**. This will allow you to save the document and select the appropriate workflow. Alternately, **Save** can be selected to save the RFI in draft to be completed later.



5. Select the appropriate workflow and click **Start Workflow**.



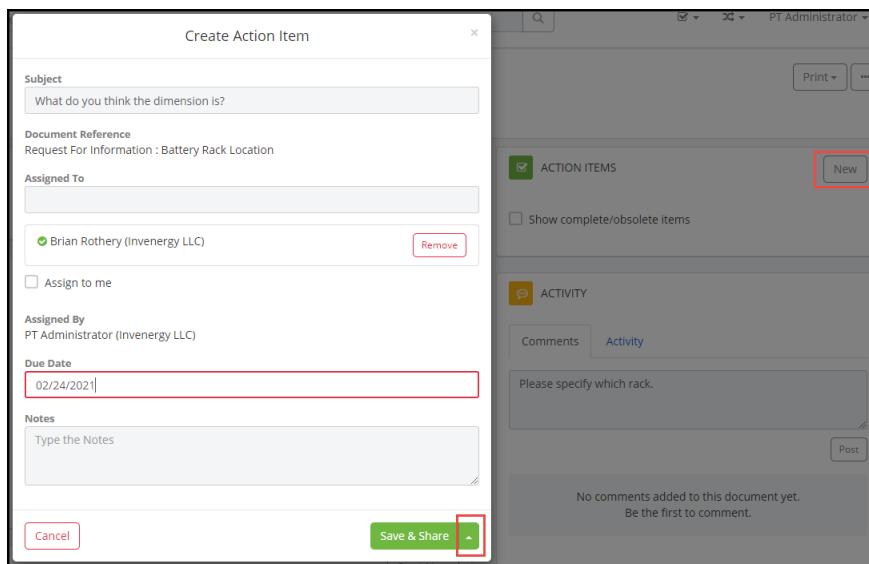
## Responding to an RFI

1. Navigate to the RFI via the email notification link, Workflow Log, or RFI Log.
2. **Optional:** If clarification to the question is required, use the **Comments** on the RFI to request that clarification is provided, and the question updated if needed. Type in your comment and click **Post**.




The screenshot shows a comment section for an RFI. At the top, there is a yellow speech bubble icon and the word "ACTIVITY". Below this, there are two tabs: "Comments" and "Activity". The "Activity" tab is selected. A text input field contains the text "Please specify which rack." and a "Post" button is located at the bottom right of the input field.

3. **Optional:** If assistance is required for the response to the RFI use **Action Items**. From the RFI click **New** in the **Action Items** pane. Complete the required information (Subject, Assigned To, and Due Date), click the arrow next to Save & Share, and click **Save**. Feedback will be provided in the Notes field of the Action Item and you will be notified when they mark the action item complete.



The screenshot shows two overlapping windows. The foreground window is titled "Create Action Item" and contains the following fields: "Subject" (What do you think the dimension is?), "Document Reference" (Request For Information : Battery Rack Location), "Assigned To" (Brian Rothery (Invenery LLC) with a "Remove" button), "Assign to me" (checkbox), "Assigned By" (PT Administrator (Invenery LLC)), "Due Date" (02/24/2021), and "Notes" (Type the Notes). At the bottom are "Cancel" and "Save & Share" buttons. The background window shows the RFI comment section with a "New" button in the "ACTION ITEMS" pane and a "Post" button in the "ACTIVITY" pane.

4. Click **Edit**, enter your response in the **Answer** field, and company and name in the **Responded By** fields.

 DETAILS Edit

**Subject**  
Battery Rack Location

**Number**  
003

**Requested By (Company)**  
ProjectTeam

**Requested By (Contact)**  
Brian Rothery

**Question**  
Confirm dimension for battery rack location from north wall.

**Proposed Solution**  
6'6"

**Cost Impact**  
No

**Cost Impact Comments**

**Schedule Impact**  
No

**Schedule Impact Comments**

**Response Requested By**  
5/7/21

**Answer**  
7'6"

**Responded By (Company)**  
Invenergy LLC

**Responded By (Contact)**  
Stephen Hempel

- When all changes are complete, click the **Save** button.
- Pass with workflow by clicking the **Tack Action** button from the banner at the top of the screen.

**(Civil) Technical RFI Workflow requires your action**

Please respond to the question in the answer field and pass the workflow to the next step. If additional clarification to the question is needed use comment action items.

Take Action [View Workflow](#)

[← Requests For Information](#)  
Request For Information: Battery Rack Location  
Created By PT Administrator (Invenergy LLC) on 2/23/21 at 10:37 AM

- Select the radio button next to **Pass** and click **Take Action**

(Civil) Technical RFI Workflow

**Your action**

☒ **Pass**  
Mark as "Passed" and move forward to the next step

☐ **Cancel**  
Mark as "Cancelled" and stop the workflow

**Notes**

Notes

Cancel Take Action

### Validating/Closing an RFI

1. Navigate to the RFI via the email notification link, Workflow Log, or RFI Log.
2. Review the RFI details for validation or acceptance.
3. **Optional:** If clarification to the answer is required, use the **Comments** on the RFI to request that clarification is provided, and the answer updated if needed. Type in your comment and click **Post**.

ACTIVITY

Comments Activity

Please specify which rack.

Post

4. Pass with workflow by clicking the **Take Action** button from the banner at the top of the screen.
5. Select the radio button next to **Pass** and click **Take Action**

(Civil) Technical RFI Workflow

**Your action**

☒ **Pass**  
Mark as "Passed" and move forward to the next step

☐ **Cancel**  
Mark as "Cancelled" and stop the workflow

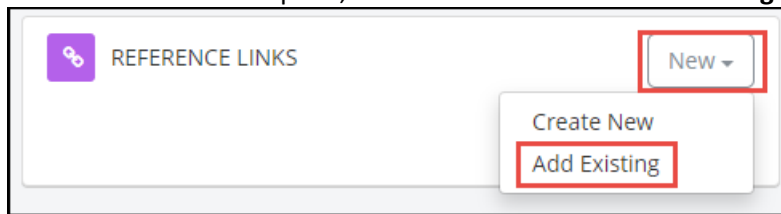
**Notes**

Notes

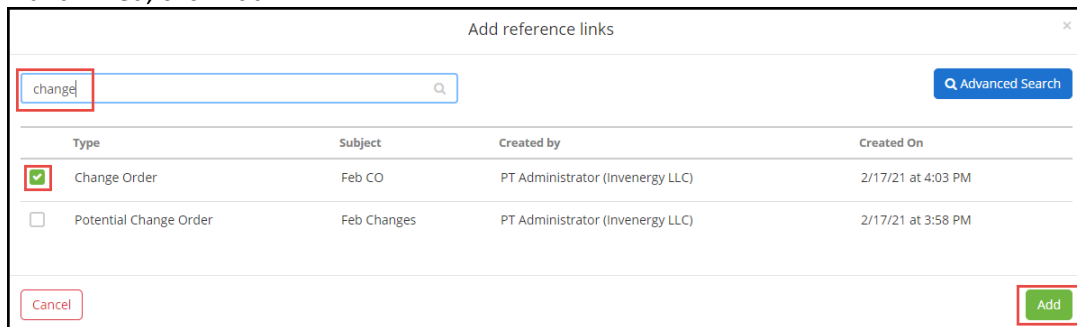
Cancel Take Action

During any part of the RFI process, references to other ProjectTeam forms can be linked.

1. In the **Reference Links** pane, click on **New** and then **Add Existing**.



2. Type a key word to search for the appropriate form(s), check the box next to each form you want linked, click **Add**.



## **Attachments**

During any part of the RFI process, attachments can be uploaded to it. If the data/file already resides in ProjectTeam, such as Drawings, Submittals, and Change Orders then reference links should be used. If the file is specific to just this RFI then using attachments is appropriate.

1. Drag and drop files as needed to the Attachments pane of the RFI.

