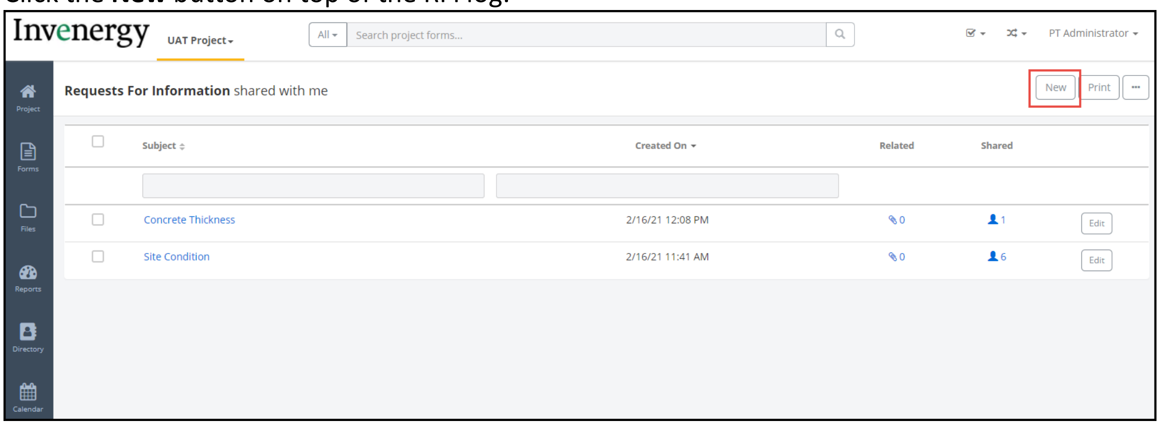
# Request for Information



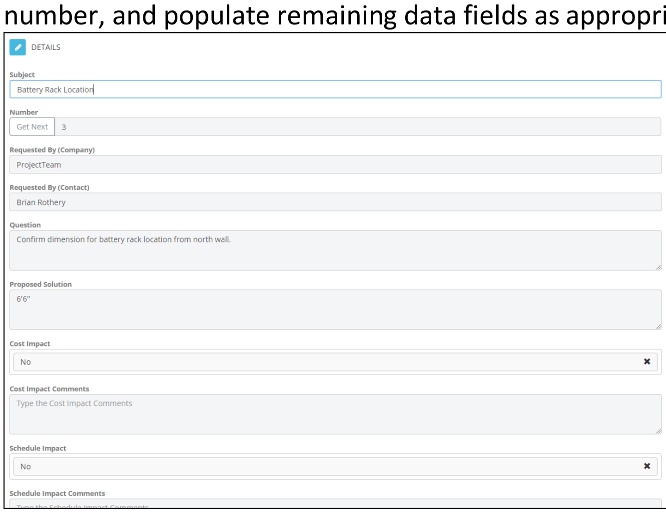
## Creating a New RFI and Initiating Workflow

1. Navigate to the RFI log within a project.

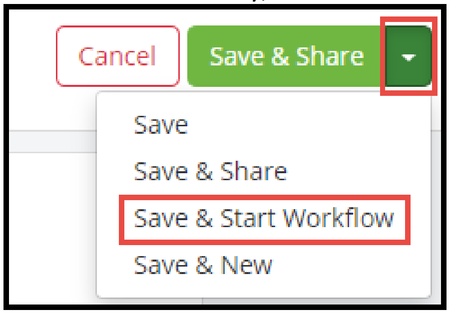
2. Click the **New** button on top of the RFI log.



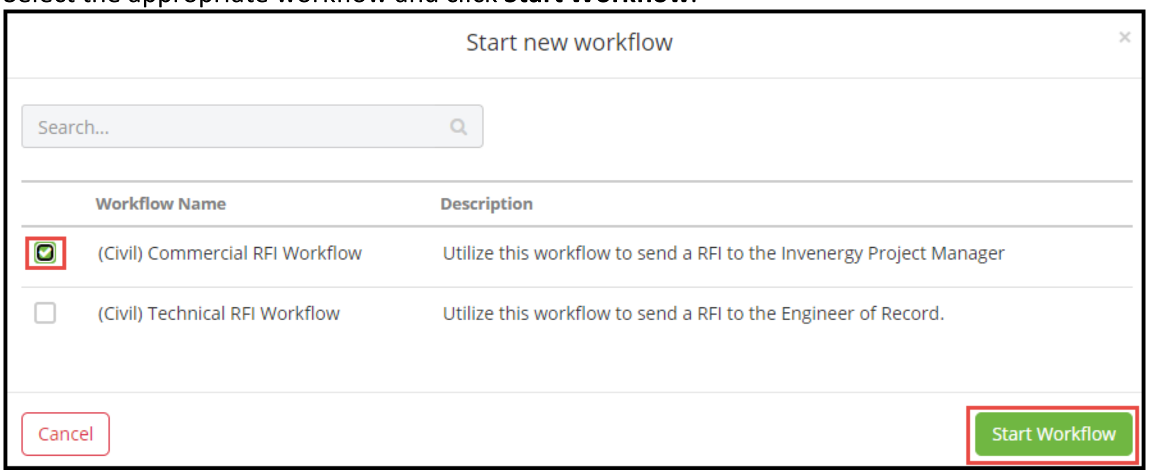

3. Provide a subject that uniquely identifies this RFI, click 'Get Next' to auto populate the next RFI number, and populate remaining data fields as appropriate.



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**.

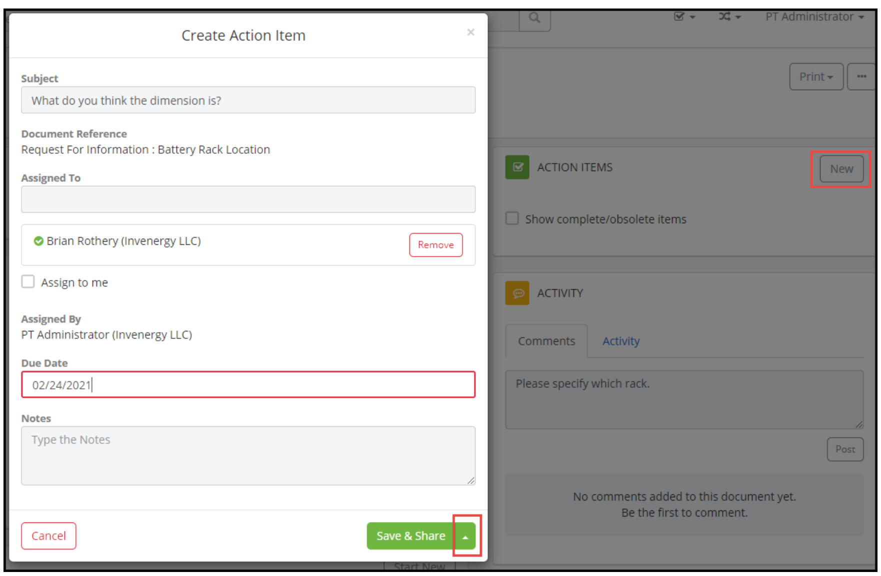


## Responding to an RFI

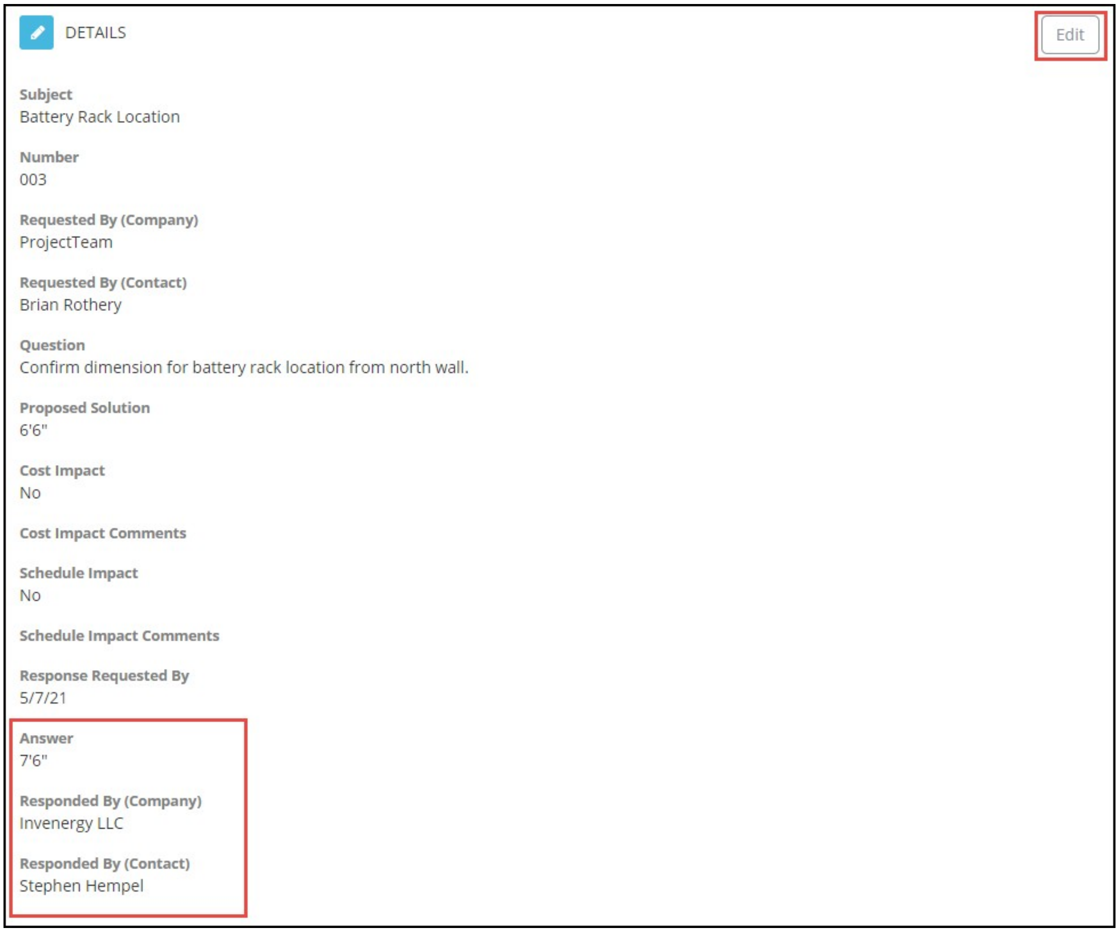
1. Navigate to the RFI via the email notification link, Workflow Log, or RFI Log.

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**.


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.

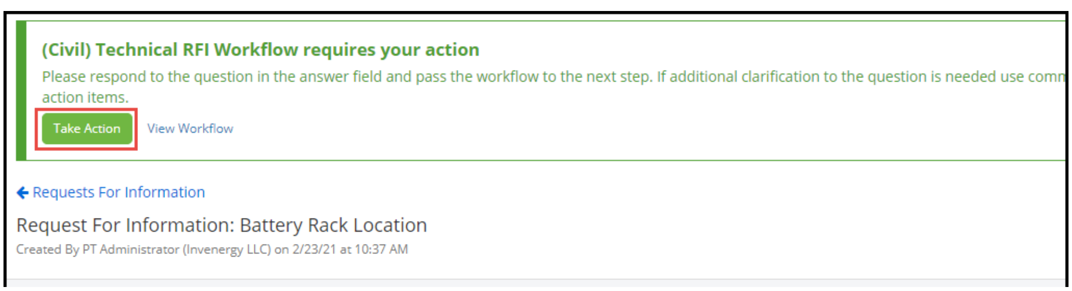



4. Click **Edit**, enter your response in the **Answer** field, and company and name in the **Responded By** fields.

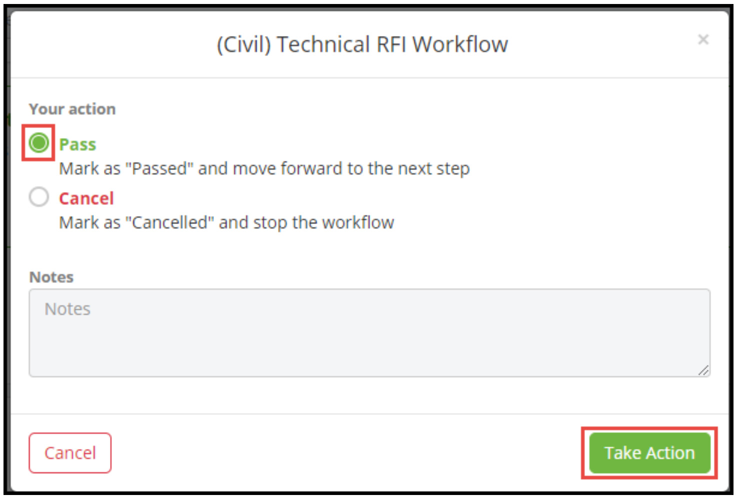



5. When all changes are complete, click the **Save** button.

6. Pass with workflow by clicking the **Tack Action** button from the banner at the top of the screen.




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




## Validating/Closing an RFI

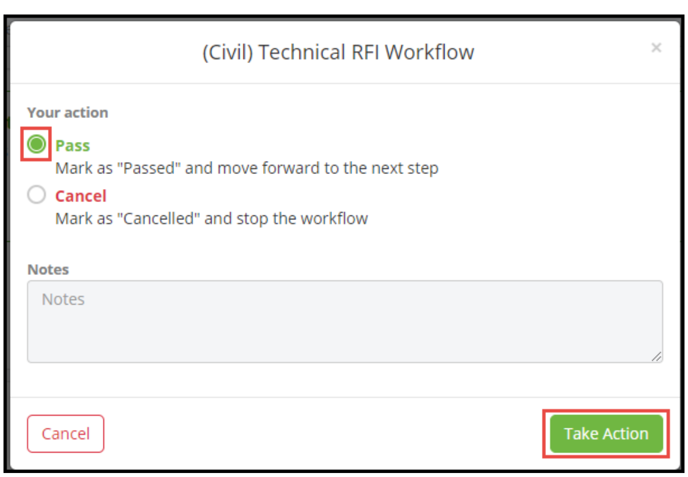
1. Navigate to the RFI via the email notification link, Workflow Log, or RFI Log.

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**.


4. Pass with workflow by clicking the **Tack Action** button from the banner at the top of the screen.

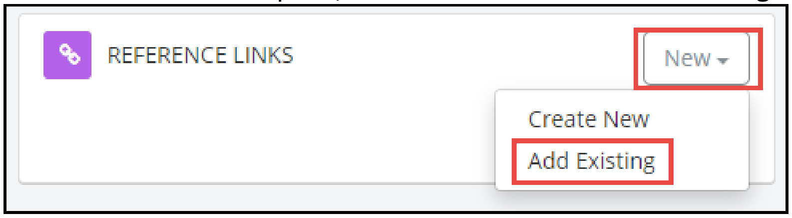
5. Select the radio button next to **Pass** and click **Take Action**



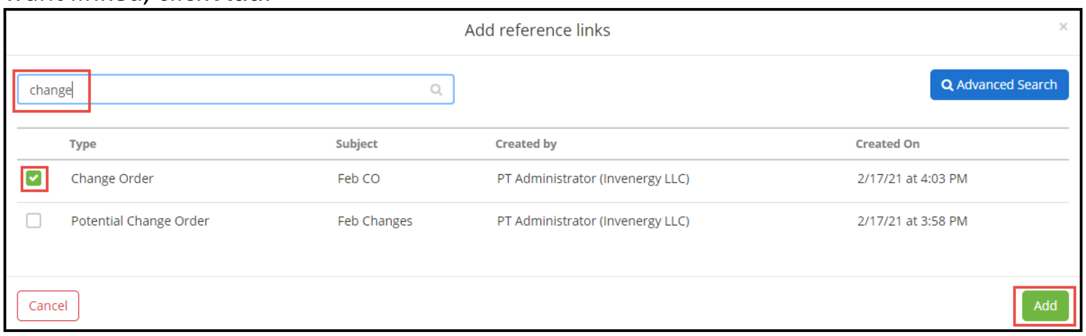
## Reference Links

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.