CREATE REQUESTS FOR INFORMATION

RFIs are processed via the Request for Information Workflow. External users and SSR users have access to start the workflow and the initiator of the workflow must pass the step to confirm receipt and mark the workflow complete.

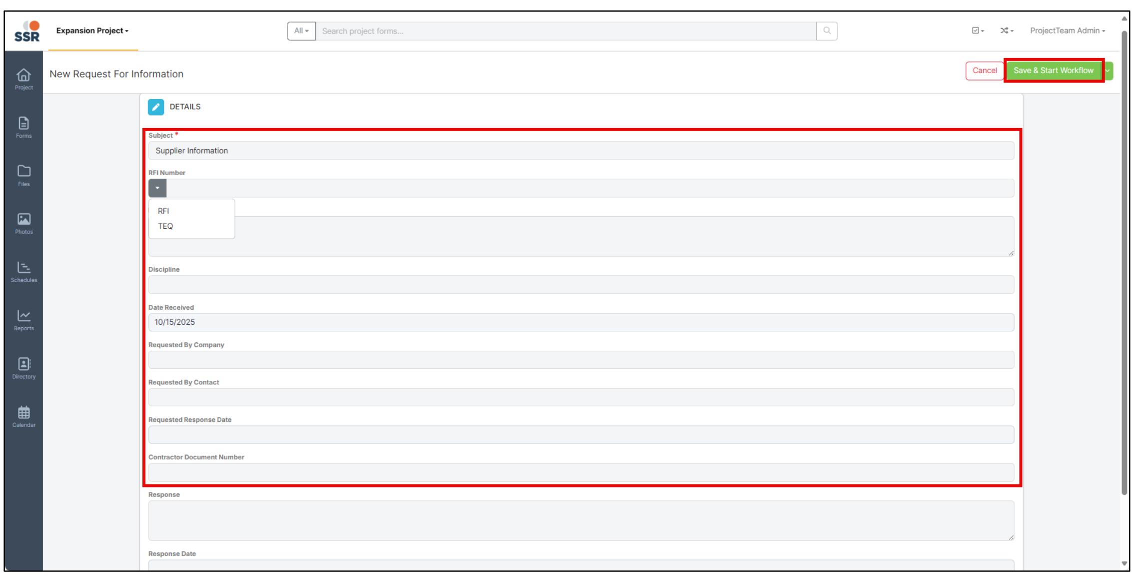
To navigate this Quick Reference Guide, simply scroll down, or use the following hyperlinks to jump to a specific section.

CREATE THE RFI

The initiator of the RFI will enter the Details and Request in the Requests for Information form and upload any supporting documents to the Attachments panel of the form.

1) Click **New Item** from the Requests For Information log view to open the New Request for Information form.

   a) Enter the **Subject.**
   b) Click the arrow under **RFI Number** and select **RF**I or **TEQ.** The next sequential number for the selection will be assigned.
   c) Enter your **Request** and fill in all other applicable fields.
   d) **Save & Start Workflow.**



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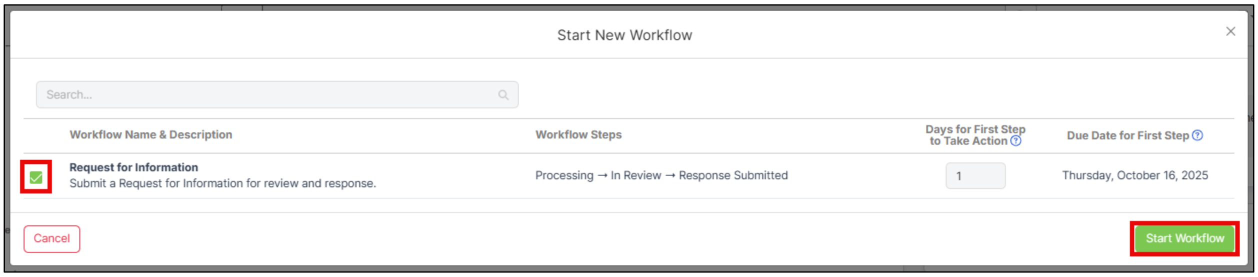
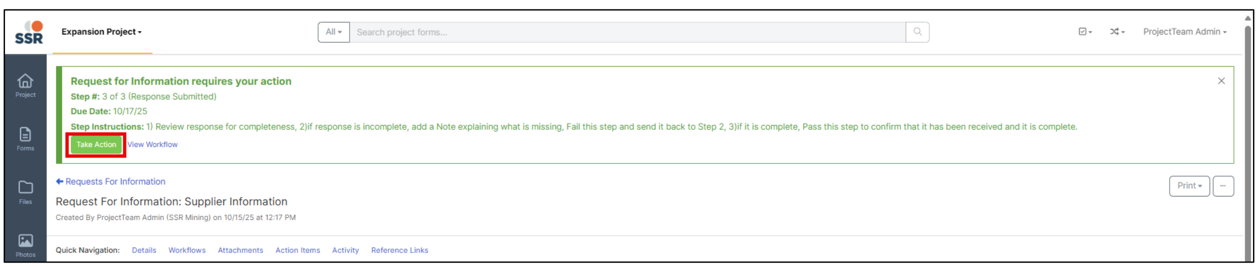
START WORKFLOW

Initiating the Request for Information Workflow assigns Step 1 to SSR's Document Control. The Initiator will be assigned the final step and will need to Pass it to complete the workflow.

1) From the **Start New Workflow** modal, select Request for Information workflow.
2) **Start Workflow**.



3) When the final step is assigned to you, use the link in the email notification or navigate in ProjectTeam to open the record.
4) Review the **Response** and new or marked-up up attachments.
5) Click **Take Action** at the top or in the Workflow panel of the record.



   i) **Pass** the step to mark the workflow complete.
   ii) **Fail** the workflow step to return the workflow to Document Control.

6) **Take Action.**

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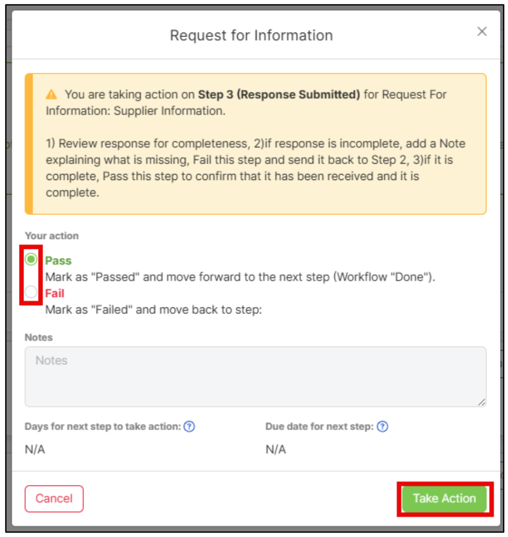
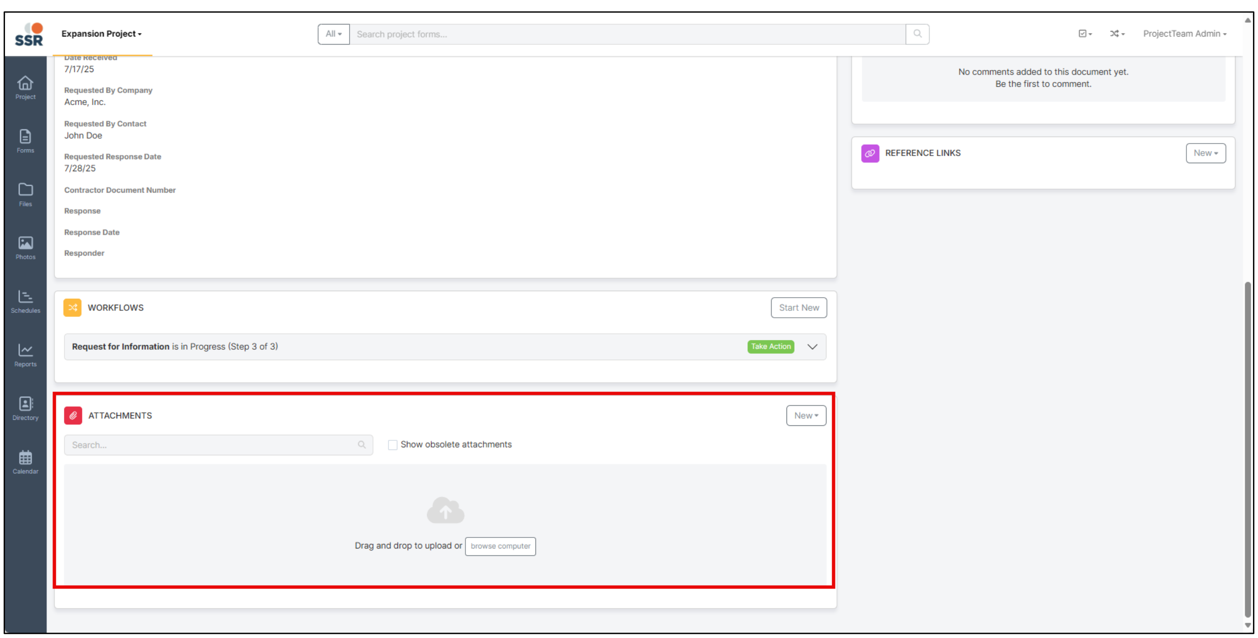


ADD ATTACHMENTS

You can add supporting documents to the saved record before or after the workflow has been started. All users with access to the record will be able to access the attachment(s) in real time.

1) Open the record.
2) Scroll to the bottom.
3) Drag & drop supporting documents into the Attachments panel.



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See **Adding Attachments to Forms for additional help.

RESOURCES

Help Pages:

Batch Import Records

Adding Attachments to Forms

Related QRGs:

Process RFIs

Engineering RFI Review

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