

	ProjectTeam Process Guide: Request for Information	Revision	01
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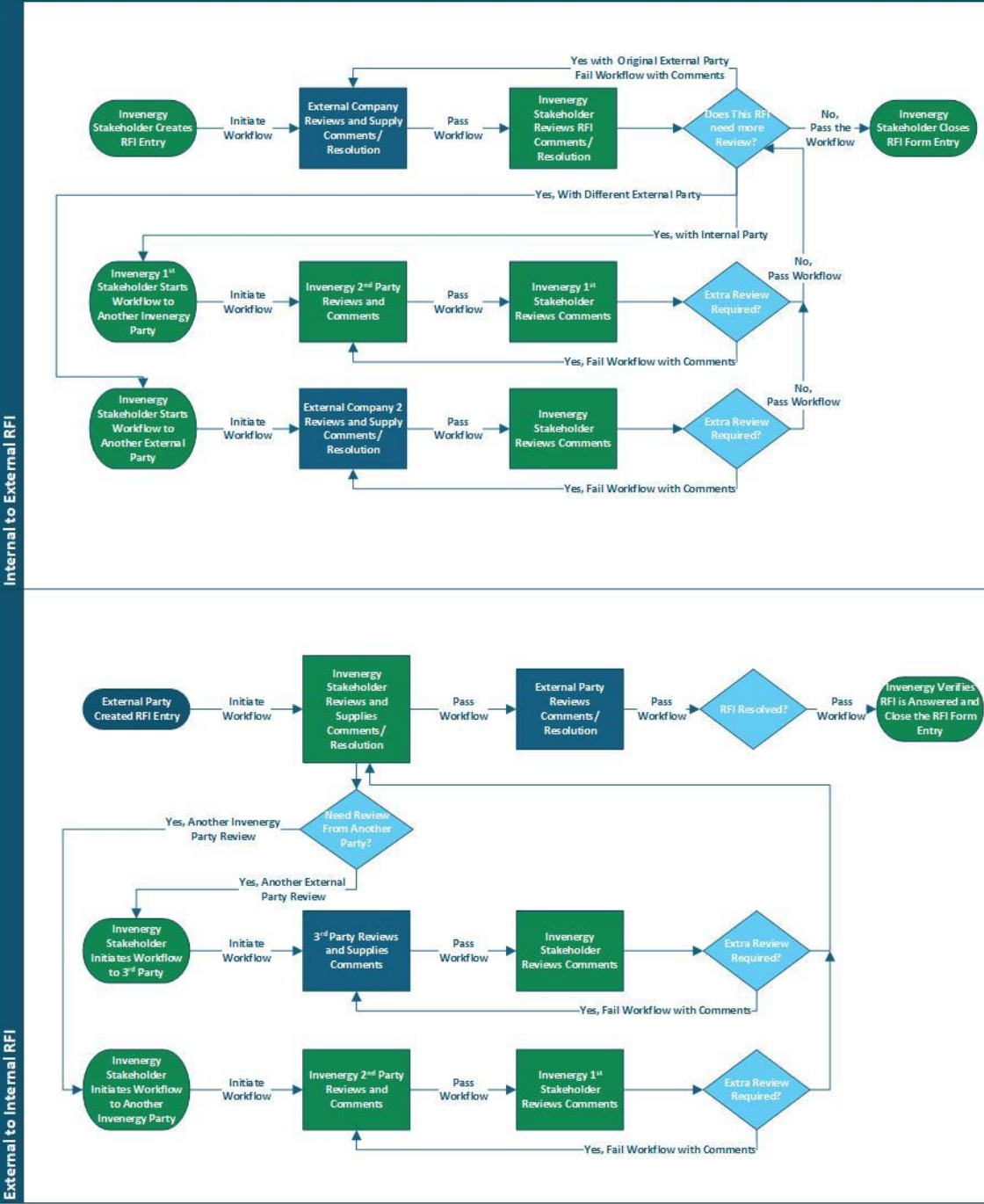
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ProjectTeam RFI General Workflow Structure



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Request for Information (RFI)

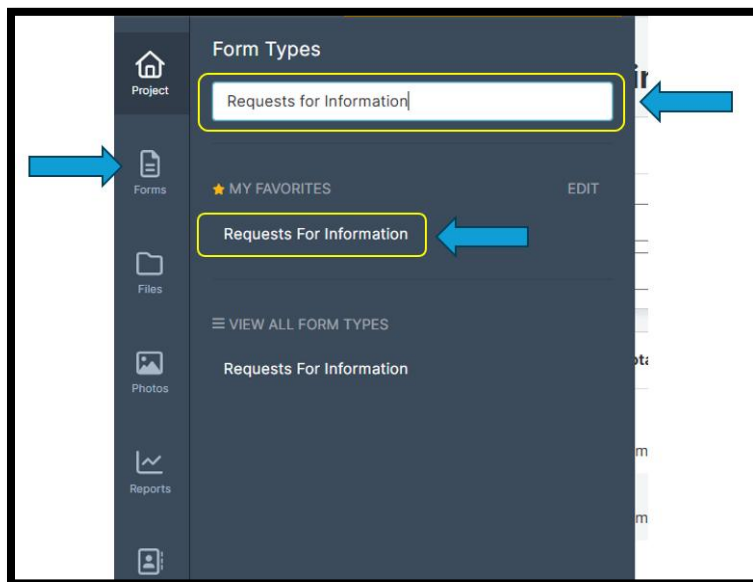
Purpose: This form is used to request permission for deviations from contract documents or drawings, request clarifying information about the project, or to request information not previously provided that is required for completion of contracted services. RFIs should not be used for providing contractually obligated documentation, material submissions, etc., requiring formal review and approval, as those items should be submitted through the Submittals form. Reference the Submittals Process Guide for further clarification.

Please note: All RFIs within ProjectTeam require a formal response from Invenergy or Invenergy's 3rd party representatives.

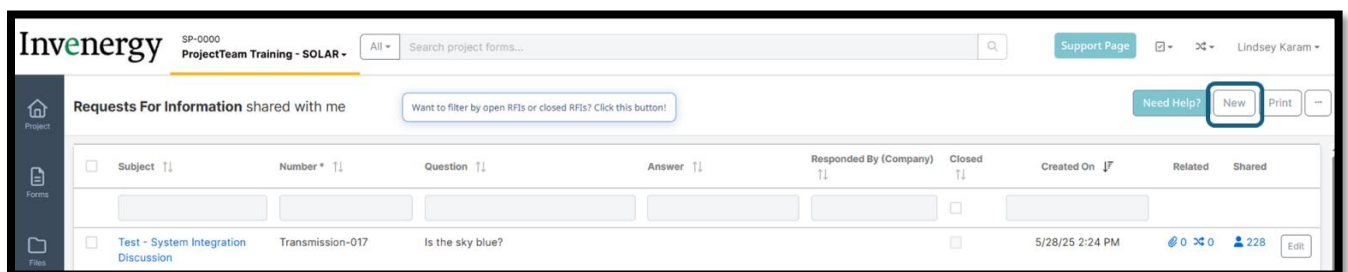
Initiators: Contractors, Consultants, Client, Invenergy

Creating a new RFI

1. Select Form, type in "Requests for Information", then select the form.



2. Select "New" in the top right corner.



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3. Fill out **all** fields except for Answer, Responded By (Company), Responded By (Contact), Closed, & Closed Date as those fields will be filled out as the workflow progresses and the RFI is answered. Further field clarifications are listed below. Please note: the purpose of the
 - a. **Subject:** Provide Number and/or Scope and a Descriptive Title.
 - i. i.e “Cable Spacing” is not acceptable and should read “#34 – Reduction in DC Cable Spacing for PBK 34”
 - b. **Number:** Number field is automatically generated when the scope of work is selected from the dropdown, assigning the next number in a sequence based on the scope of work and existing RFIs in the project.
 - c. **Description:** Include a comprehensive description of the solution **with justification on why the deviation is needed** (if a deviation is requested). Supply all backup information and EOR approvals needed in attachments.
 - d. **Proposed Solution:** This field is to capture a suggested solution from the EOR or Contractor, if provided.
 - e. **Redlines Required?:** A checkbox indicating that the RFI would result in redlines to a design. Invenergy engineers are responsible for ensuring that these RFI redlines are incorporated into As-Built drawings.

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New Request For Information

Cancel Save & Start Workflow

DETAILS

Date Created * 08/12/2025

Subject * Example RFI

Number * Collection-Civil 30

Requested By (Company) Invenergy LLC

Requested By (Contact) Stephanie Ruggeri

Target Resolution Date 08/22/2025

Question Enter your question here...

Proposed Solution Include any suggested solution from the EOR or Contractor, if applicable.

Redline Required? ☐

Answer

Responded By (Company)

Responded By (Contact)

Closed ☐

Closed Date

4. Select “Save & Start Workflow” in the top right corner, then select and initiate the appropriate workflow.

RFI Process

All RFIs should follow the general process described below.

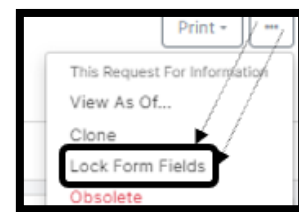
1. Initiator – Create the RFI
The Initiator is responsible for drafting the RFI and starting the workflow as detailed above.
2. Responder – Review and Respond

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- a. Review the RFI question and Proposed Solution and provide a response in the Answer section of the RFI details, making a note if there is any variance to the contract scope/specifications and relevant references. Populate the “Responded By (Company)” and “Responded By (Contact)” fields.
 - i. **Please note:** If the issue should be discussed with another counterparty or requires approval/input from another counterparty (internal or external), a new RFI can be created to that counterparty OR a new workflow can be started within the existing RFI. It is up to the project team to determine which option is best.
 - i. If a new RFI is created, utilize the “Reference Link” feature to link the RFIs.
 - ii. If input and approval is needed from multiple parties, best practice is to provide answers in both the workflow notes and in the Answer Section of the RFI. With multiple responses, responders should note Name, Company and Date before there answer and ensure they are not writing over other responses
 - b. If the RFI is unclear or needs further clarification, return the workflow to the Initiator by the “Cancel” function.
 - i. If the workflow is cancelled, the initiator will need to Restart the workflow.
 - c. Pass the Workflow, as a best practice include the RFI Answer in the Notes section of the Workflow dialog box. **Please note:** Workflow will still be “Passed” when the proposed solution is denied, or a different answer is proposed by the reviewer.
3. Initiator Review – Confirm Response
- a. Review the response to ensure it is clear, complete, and actionable.
 - b. If the response is satisfactory, pass along the workflow, including a comment that the response is accepted.
 - c. If the response is unclear or insufficient, or the new answer is not acceptable, return the workflow to the Responder by the Fail function. Use the workflow comment field to provide feedback regarding the response provided. **Please note:** Comments within the form are strictly for informal discussion.
4. Close-Out – Finalize and Archive
- a. For all workflows involving external parties, the Invenergy Project Manager will be the last step in the workflow. The Invenergy PM will review the RFI response to determine it is sufficient, while considering impact to scope, schedule and budget.
 - b. Once all RFI workflows have been completed, the individual completing the workflow shall:

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- i. Ensure the Answer field is populated, mark the RFI as closed and fill out the Closed Date Field in the RFI Details section. p
- ii. Lock the form fields by clicking on the ellipsis button at the top right-hand corner of the screen and selecting “Lock Form Fields”.
 2. Once the RFI is locked, it can only be unlocked by a ProjectTeam Admin (ProjectTeam@invenergy.com).
 3. If the RFI topic needs to be revisited later, create a new RFI rather than adding comments and/or attachments to the original RFI. Use the Reference Link section to link the old RFI that the new RFI relates to.



NOTE: The Invenergy Project Manager is ultimately responsible for ensuring all RFI’s are closed out, but other Invenergy personnel can assist with this process.

RFIs and Document Controls

Below is an example of how RFIs are processed in the form and stored within the folder structure.

When a project reaches Substantial and Mechanical completion, the Document Controls team will assess the status fields within the RFI Form. Once assessed that the forms have been officially completed, the Document Controls team will assign a Document ID and transfer all form attachments to the appropriate folder location within the “Files” section of Project Team.

Example of file path to where the RFI’s will be stored once the status has been updated:
(Document Controls will move attachments, this is for awareness of final storage location)

“Files” Section -> 03 Construction -> 07 PM -> 7.07 Transmittals & RFI’s -> 07.07.02 RFI’s

*The attachments will be stored within the folder structure under the corresponding scope, relevant to the contractor’s specific Job Books location.

Document Controls is responsible for retrieving and archiving all final deliverables that fall under the following statuses:

- **Final and Approved**
- **Approved with Comments**
- **Closed** (specific to RFIs)

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Submittal Items shared with me

Items	Packages	
Subject	Submittal Category	Status
☐ A15 PCS Datasheet	O&M Package	Final & Approved
☐ A16 PCS PSSE default model	Vendor package	Approved with Comments
☐ A17 PCS Schematics	Vendor package	Final & Approved
☐ A19 PCS Mechanical Drawings	Vendor package	Approved with Comments
☐ A20 PCS Installation Manual	Installation Package	Final & Approved
☐ A22 Inverter short circuit behavior	Vendor package	Final & Approved
☐ A23 Step up transformer switchgear	Vendor package	Final & Approved

PC - Document Controls will retrieve and archive the final deliverables with updated status.



Form Types

Search...

★ MY FAVORITES

Requests For Information

(A)

DETAILS

Date Created * ⓘ
08/12/2025

Subject *
Example RFI

Number : *
BOP Civil 1

Collection-Electrical
Transmission
Substation-Civil
Substation-Structural
Substation-Electrical
BOP Civil
WTG-Foundations
WTG-Mech/Erection
Turbines-Supplier
O&M Building
SCADA
Commercial
Switchyard

The "RFI Classification" will be included in naming convention when stored in Project Files → **CLOSED RFIs**.

Naming Convention: **Project Name_Contractor_RFI # from Form_Closed Date**
➤ Example: Project ABC_XYZ Company_RFI BOP Civil # 1_12August2025

(A) RFIs Processed in Forms

Finalized & "Closed" RFIs

(B) Document Storage

(B)

Files shared with me

Project Files Form Attachments Halted/Obsolete Files

Project Files > 03 CONSTRUCTION > 07 PM > 7.07 TRANSMITTALS & RFI

☐ Name	Last Updated
☐ 7.07.01 Transmittals 0 Files	Jeff Bialorucki (Invenergy LLC) 3/12/24 at 10:21 AM
☐ 7.07.02 RFIs 0 Files	Jeff Bialorucki (Invenergy LLC) 3/12/24 at 10:21 AM

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Action Items vs Comments vs Formal Responses on RFIs

The screenshot displays a software interface for managing Request for Information (RFI) items. A central text box titled "Differentiating (1) Action Items, (2) Comments, and (3) Formal Responses" is overlaid on the interface. Three numbered callouts (1, 2, and 3) point to specific features:

- Callout 1:** Points to the "ACTION ITEMS" tab in the top right corner.
- Callout 2:** Points to the "Comments" tab in the "ACTIVITY" section on the right.
- Callout 3:** Points to the "WORKFLOWS" tab in the bottom right corner.

The interface includes a "DETAILS" section on the left with fields for Date Created, Subject, Number, Collection, Requested By (Company/Contact), Target Resolution Date, Question, Proposed Solution, Redline Required, Answer, Responded By (Company/Contact), Closed status, and Closed Date. The "ACTIVITY" section on the right shows a list of comments and activity items. The "WORKFLOWS" section at the bottom right shows a workflow status for "(RFI) Electrical Engineer to Project Manager is Done".

Action Items (1) are a type of notification used for reminders. These can be assigned to others or yourself. The details of Action Items includes the subject of the particular item, which document it's referencing, to whom the item is assigned, from whom the item was assigned, a due date for the item to be addressed, and any relevant notes the end user would like to include.

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The screenshot shows a 'Create Action Item' form with the following fields and options:

- Subject:** A text input field with a red border and a red asterisk indicating it is required. A dashed arrow points from a callout box to this field.
- Document Reference:** A text input field containing the text 'Request For Information : ProjectTeam Example'.
- Assigned To:** A text input field with a red asterisk indicating it is required.
- Assign to me:** A checkbox option.
- Assigned By:** A text input field containing the text 'Stephanie Ruggeri (Invenergy LLC)'.
- Due Date:** A text input field with a red border.
- Notes:** A large text area with a placeholder 'Type the Notes'.
- Buttons:** 'Cancel' (red outline) and 'Save' (green) at the bottom.

A callout box with the number '1' contains the text: 'Action Items are utilized as a nudge or reminder when you need an action or info from someone and want to assign a due date.'

Comments (2) are used for informal collaboration within the specific form entry. As the end user of a comment, you can delete / edit your own comments. You can tag project users in comments, which will send the tagged user an email notification. The purpose of this collaborative space is to allow for further clarification and to loop in others within the same project / share group for additional review. *Please note: The comments section is **NOT** the location formal decisions are documented. As explained above, comments can be edited or deleted by the owner of each comment, which does not then hold the integrity of the conversations being captured.*

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The comments section is for casual collaboration within a record. Users can only delete/edit their own comments. The purpose of the comments section is to make suggestions to other people or track issues for follow-up. This area is not meant to document final decisions.

2

Comments

Add @ to force a notification to users

Make Private Post

Stephanie Ruggeri
11/29/23 12:23 PM
Both were considered to provide my response.

Stephanie Ruggeri
11/29/23 12:22 PM
@Stephanie Ruggeri Did you look at Accuweather or the Weather Channel?

Any formal responses or outcomes should be recorded in the **Details section** (3) of the form **and** a **workflow's Notes** (3) when taking action, as the Notes section of the workflow cannot be edited after the workflow is passed. The Answer section in the RFI Details provides a space where all parties can easily and quickly view the answer. For RFIs, the PM will be the last step within the workflow. It is their responsibility to confirm the Answer field is correct, reflecting the final decision identified in the workflow's notes.

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WORKFLOWS

Start New

3

RFI) Electrical Engineer to Project Manager is Done

Restart

Started
11/29/23

→

REVIEW (PROJECT MAN...
Passed
11/29/23
✓ STEP 1

→

REVIEW (ELECTRICAL EN...
Passed
11/29/23
✓ STEP 2

→

CLOSE OUT (PM)
Passed
11/29/23
✓ STEP 3

Step #	Step Label						Due Date
0							
	Action	Name			Date Completed	Notes	
	Started	Stephanie Ruggeri Invenergy LLC			11/29/23		
Step #	Step Label						Due Date
1	Review (Project Manager)						12/1/23
	Action	Name			Date Completed	Notes	
	Passed	Stephanie Ruggeri Invenergy LLC			11/29/23	Yes, it will snow 4-8 inches with wind gusts up to 60 mph	
Step #	Step Label						Due Date
2	Review (Electrical Engineer)						12/1/23
	Action	Name			Date Completed	Notes	
	Passed	Stephanie Ruggeri Invenergy LLC			11/29/23	Agreed with response. No further action required.	
Step #	Step Label						Due Date
3	Close Out (PM)						11/30/23
	Action	Name			Date Completed	Notes	
	Passed	Stephanie Ruggeri Invenergy LLC			11/29/23	Answer: Yes, it will snow 4-8 inches with wind gusts up to 60 mph	

A. The PM will be the last step within the Workflow. It is their responsibility to confirm the Answer field is correct, reflecting the final decision identified in the Workflow's notes.

★

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3

Date Created ⓘ
11/29/23

Subject
ProjectTeam Example

Number * ⓘ
Collection-Civil-012

Requested By (Company)
Invenergy LLC

Requested By (Contact)
Stephanie Ruggeri

Target Resolution Date
12/1/23

Question
Will it snow this weekend?

Proposed Solution ⓘ

Redline Required?
☐

Answer
Yes, it will snow 4-8 inches with wind gusts up to 60 mph.

Responded By (Company)
Invenergy

Responded By (Contact)
Stephanie Ruggeri

Closed
☒

Closed Date
11/29/23

Print ▾

⋮

This Request For Information

View As Of...

Clone

Lock Form Fields

Obsolete

All Requests For Information

Customize Form Fields

B. Any formal responses or outcomes should be recorded in the Details section of the form and a Workflow's Notes when taking action.

C. The PM will then indicate as Closed (checkbox), and "Lock Form Fields." Locking the form fields also ensures that the question and response will no longer be editable establishing a formal document of record.

WORKFLOWS

Start New

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Team	Reviewed and Added Comments	Reviewed and Accepted
Electrical Engineering		EW, KG, JB
Solar Engineering	RS	
Wind Engineering	JM	
BESS Engineering	RG	
Civil Engineering	JS	
SCADA Engineering	MM	JR
Transmission Engineering	EB	
Project Management	LT	
Document Controls		JB