CREATE REQUESTS FOR INFORMATION

RFIs are processed via the Request for Information Workflow. External users and SSR users have access to start the workflow. Step 1 of the workflow goes to Document Control for review. The passed step keeps the workflow (Step 2) in Document Control's court with instructions to start the applicable Engineering Review workflow(s) and wait for response(s) before passing Step 2. Step 3 returns the RFI back to the workflow Initiator. The initiator of the workflow must pass the step to confirm receipt and mark the workflow complete.

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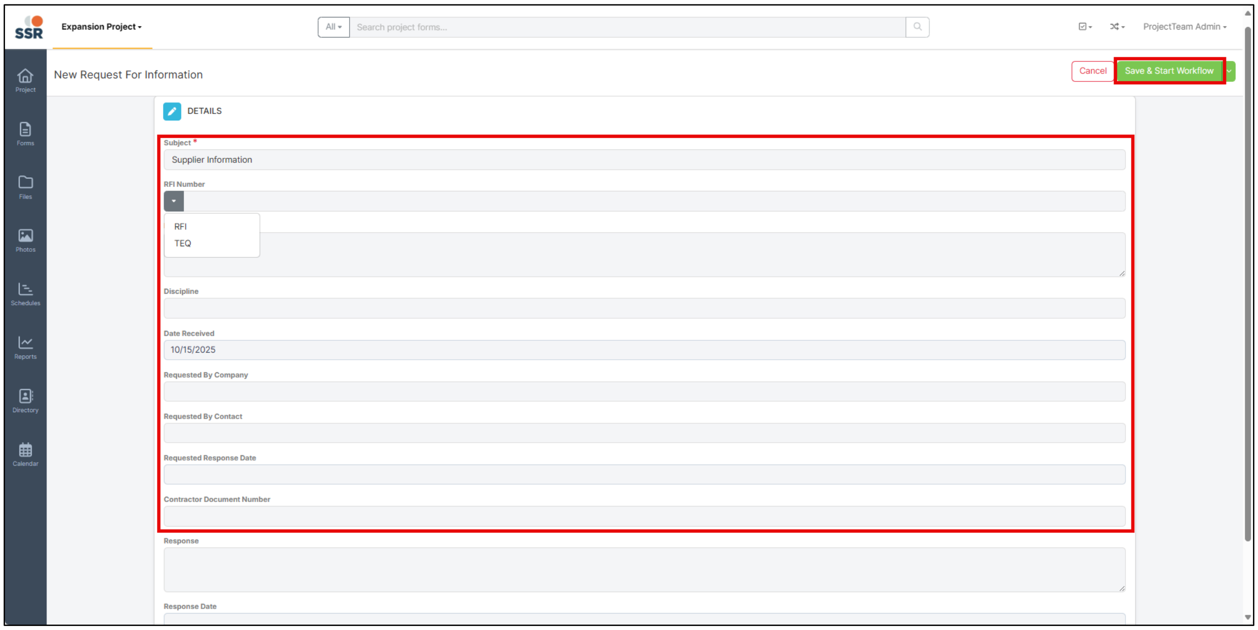
CREATE THE RFI

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**.
   d) Select the **Discipline**, if applicable.
   e) Select the **Requested By Company** and **Contact**.
   f) Select the **Requested Response Date.**
   g) Enter the **Contractor Document Number.**
   h) **Save & Start Workflow.**
      i. Save & Start Workflow is the default option but you can use the dropdown arrow to select Save to save the record as a draft, no one else has access to it. You can also select Save & New which will save it and open a new RFI form.

ii. You can start the workflow at any time by clicking **Start New** from the **Workflow** panel of the saved record.

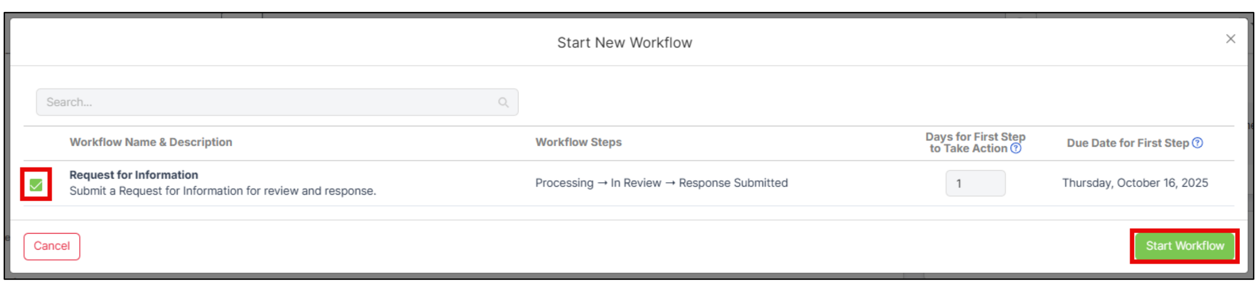


See **Add Attachments for help with uploading supporting documents.

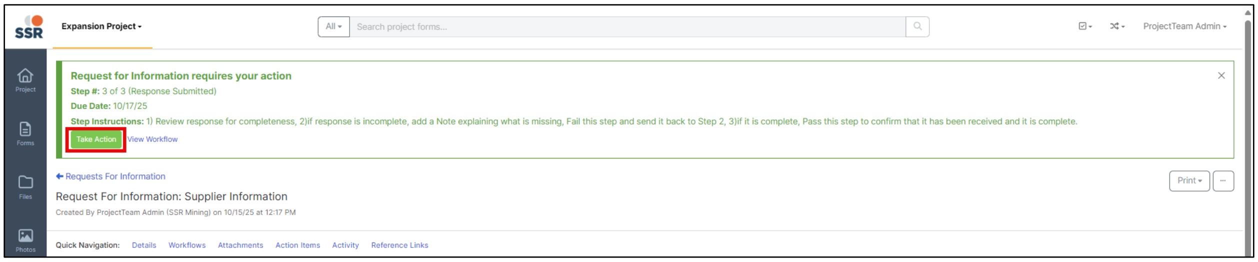
START WORKFLOW

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

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

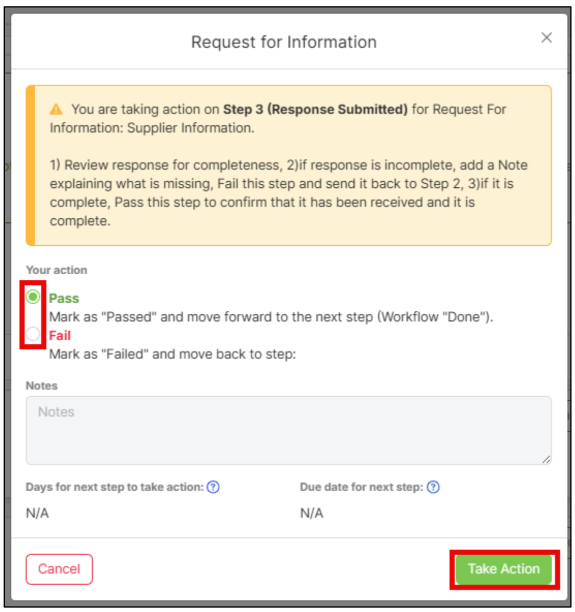


4) When the final step is assigned to you, use the link in the email notification or navigate in ProjectTeam to open the record.
5) Review the **Response** and new or marked-up up attachments.
6) Click **Take Action** at the top or in the Workflow panel of the record.



a) **Pass** the step to mark the workflow complete.
b) **Fail** the workflow step to return the workflow to Document Control.

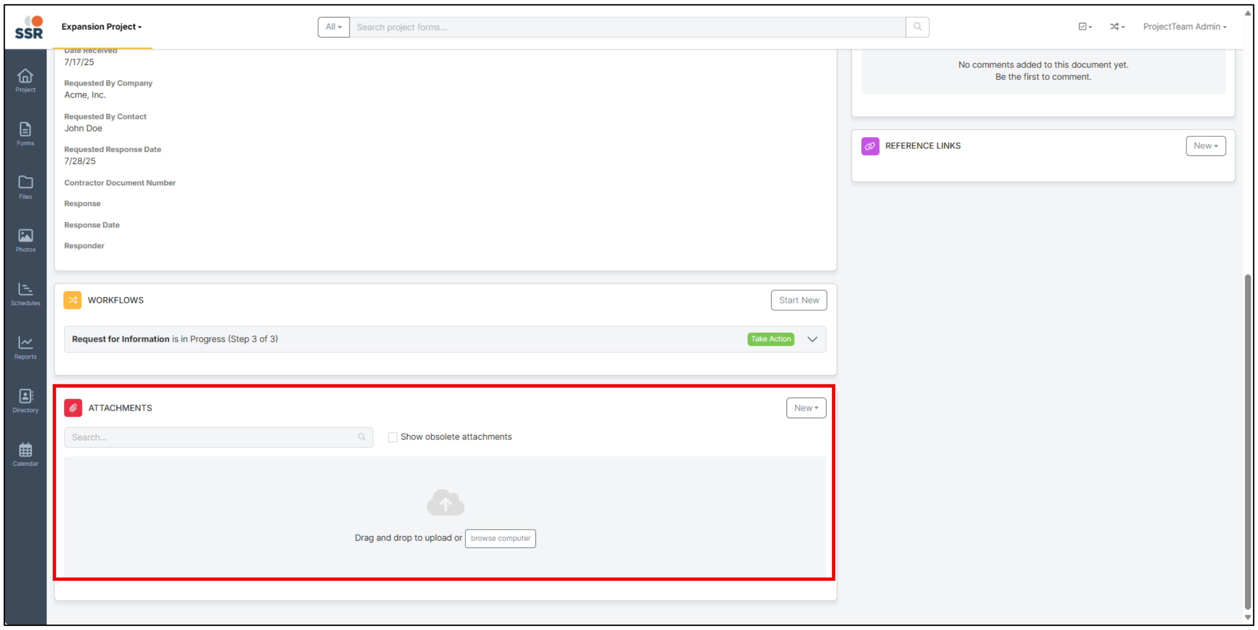
7) **Take Action.**



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.



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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