

PROCESS REQUESTS FOR INFORMATION

Step 1 of the Request for Information (RFI) 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 to the workflow Initiator. The Initiator 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.

[Review the RFI](#)

[Start Engineering Review Workflow](#)

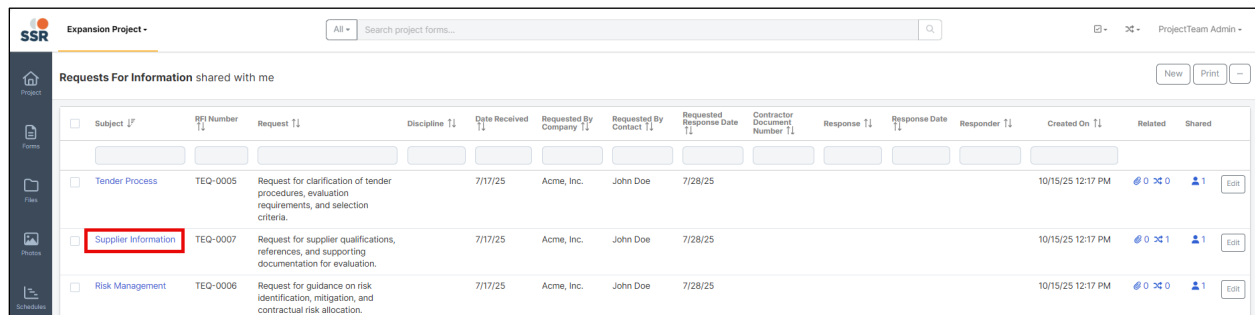
[Review Engineering Response and Return to Initiator](#)

[Additional Resources](#)

REVIEW THE RFI

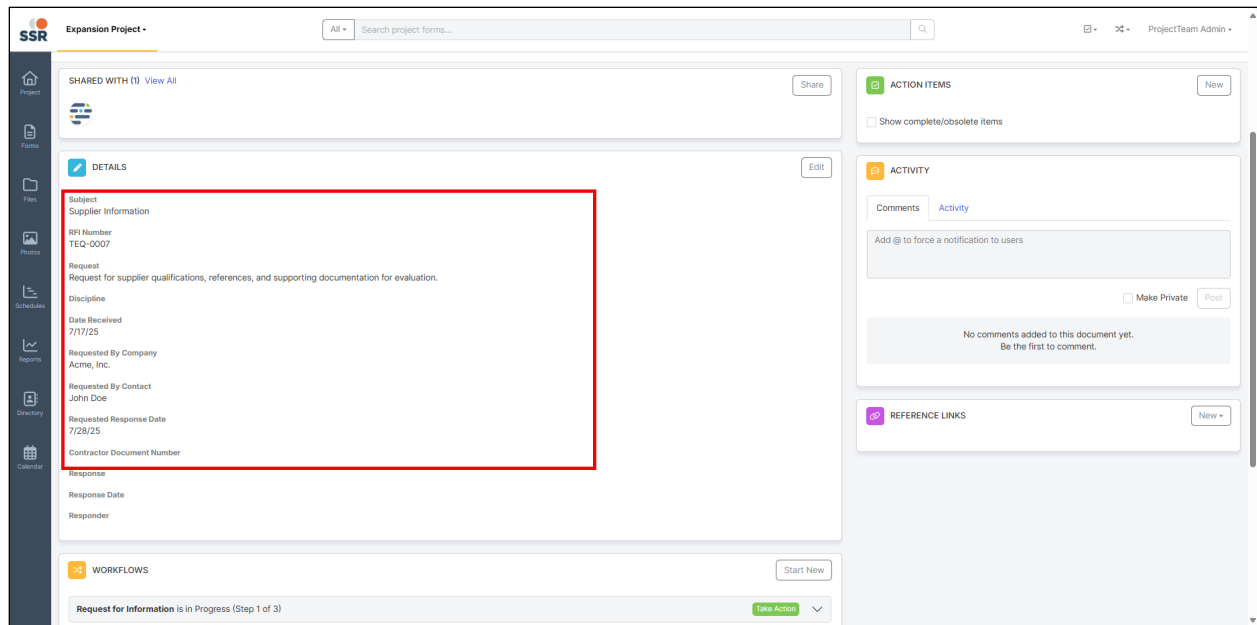
When the Request for Information workflow is started, Document Control will receive an email notification that workflow Step 1 is in their court. Document Control will review the RFI Details and supporting documents for completeness and validity against construction documents.

- 1) Open the RFI by clicking on the link in the email or navigating to it from the RFI log view.

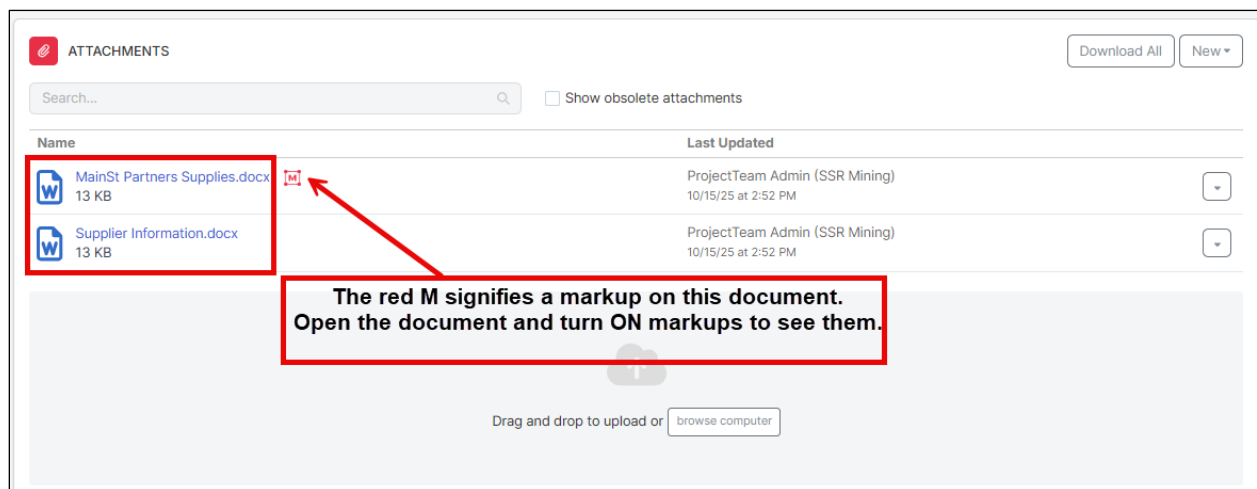


Subject	RFI Number	Request	Discipline	Date Received	Requested By Company	Requested By Contact	Requested Response Date	Contractor Documents Number	Response	Response Date	Responder	Created On	Related	Shared
Tender Process	TEQ-0005	Request for clarification of tender procedures, evaluation requirements, and selection criteria.		7/17/25	Acme, Inc.	John Doe	7/28/25					10/15/25 12:17 PM		
Supplier Information	TEQ-0007	Request for supplier qualifications, references, and supporting documentation for evaluation.		7/17/25	Acme, Inc.	John Doe	7/28/25					10/15/25 12:17 PM		
Risk Management	TEQ-0006	Request for guidance on risk identification, mitigation, and contractual risk allocation.		7/17/25	Acme, Inc.	John Doe	7/28/25					10/15/25 12:17 PM		

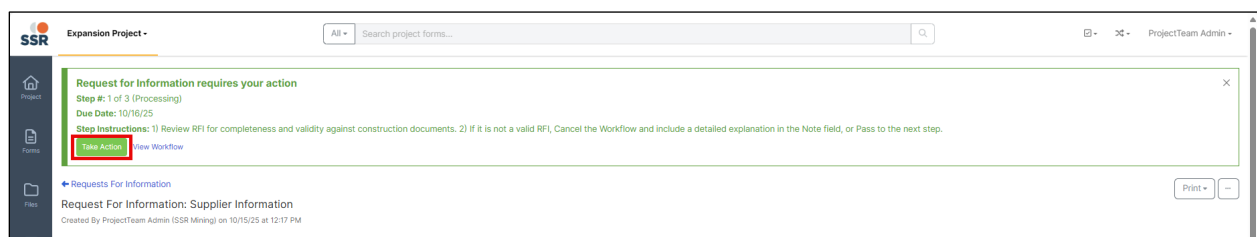
- 2) Review the **Details** in the form.



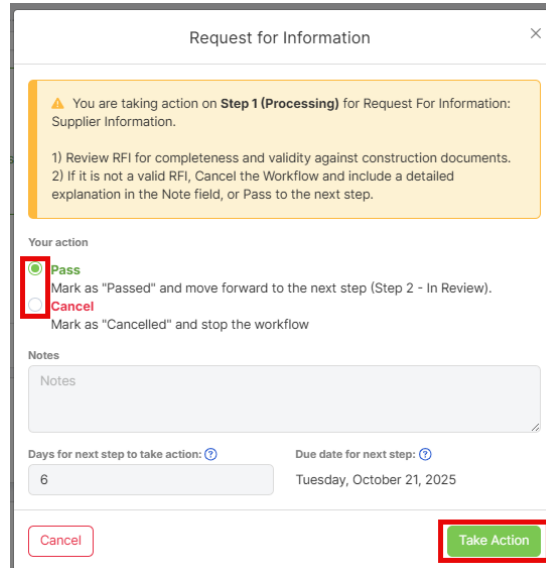
- 3) Open and review the attached supporting documents.
 - a. Add Markups, as needed. ****See *Add markup annotations to a file* for additional help.**



- 4) Click **Take Action** from the top of the page or from the Workflow panel of the RFI.



- 5) **Pass** the workflow step to move it to the Review step or **Fail** the step to Cancel the workflow and notify the initiator. Use **Notes** to justify the cancellation.

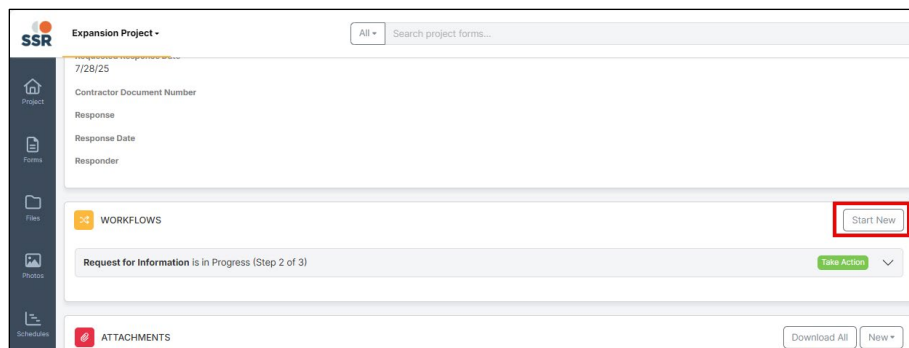


***Step 2 of the workflow remains in Document Control's court. Do not pass Step 2 until you have received the review response from the **Engineering Review Workflow**.*

START ENGINEERING REVIEW WORKFLOW

Document Control will start the appropriate **Engineering Workflow** based on the related discipline of the RFI and wait for the response before Passing the Review step of the **Request for Information Workflow**.

- a. From the Workflow panel of the RFI, click **Start New**.



- b. **Select** the appropriate engineer(s) to respond and **Start Workflow**.

Start New Workflow

Workflow Name & Description	Workflow Steps	Days for First Step to Take Action	Due Date for First Step
☐ Civil Engineering Response Utilized to forward an RFI or Submittal Package to Civil Engineering for a response.	Civil Engineering Response	6	Monday, October 20, 2025
☐ Earthworks Engineering Response Utilized to forward an RFI or Submittal Package to Earthworks Engineering for a response.	Earth Works Engineering Response	6	Monday, October 20, 2025
☐ EIC Engineering Response Utilized to forward an RFI or Submittal Package to EIC Engineering for a response.	EIC Engineering Response	6	Monday, October 20, 2025
☒ Environmental Engineering Response Utilized to forward an RFI or Submittal Package to Environmental Engineering for a response.	Environmental Engineering Response	6	Monday, October 20, 2025
☐ Geotech Engineering Response Utilized to forward an RFI or Submittal Package to Geotech Engineering for a response.	Geotech Engineering Response	6	Monday, October 20, 2025
☐ Health & Safety Engineering Response Utilized to forward an RFI or Submittal Package to Health & Safety Engineering for a response.	Health & Safety Engineering Response	6	Monday, October 20, 2025
☐ Process Plant Engineering Response Utilized to forward an RFI or Submittal Package to Process Plant Engineering for a response.	Process Plant Engineering Response	6	Monday, October 20, 2025
☐ SMP Engineering Team Response Utilized to forward an RFI or Submittal Package to SMP Engineering for a response.	SMP Engineering Response	5	Sunday, October 19, 2025

Cancel

Start Workflow

c. You should have 2 active workflows.

WORKFLOWS

Start New

Environmental Engineering Response is in Progress (Step 1 of 1)

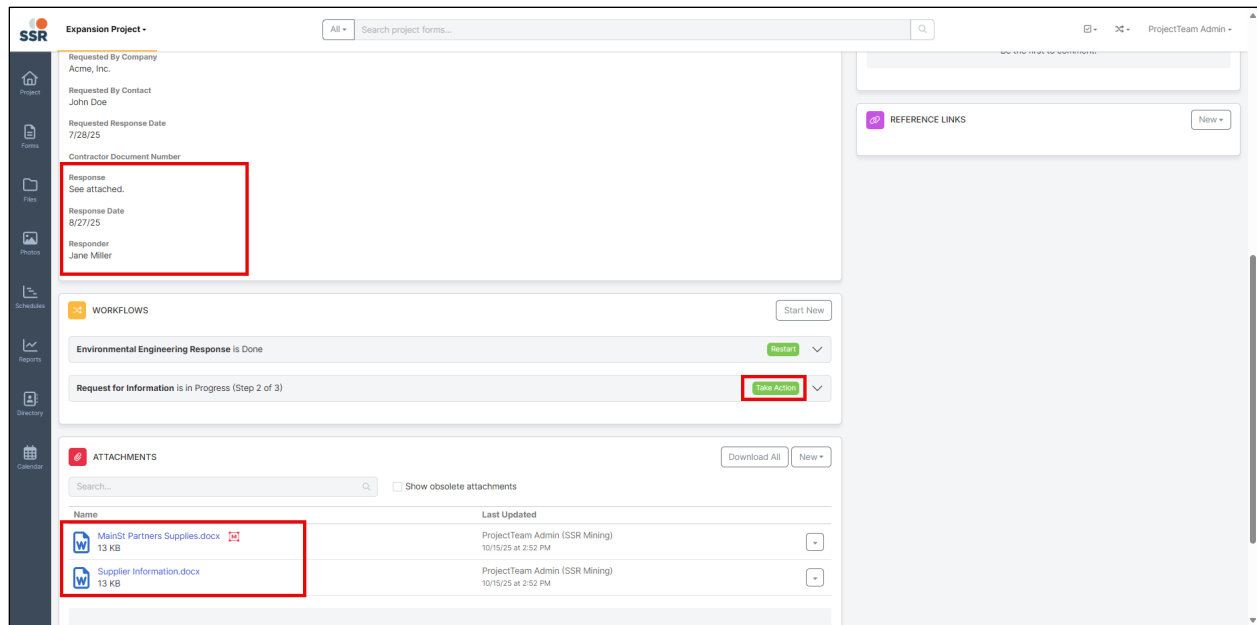
Request for Information is in Progress (Step 2 of 3)

Take Action

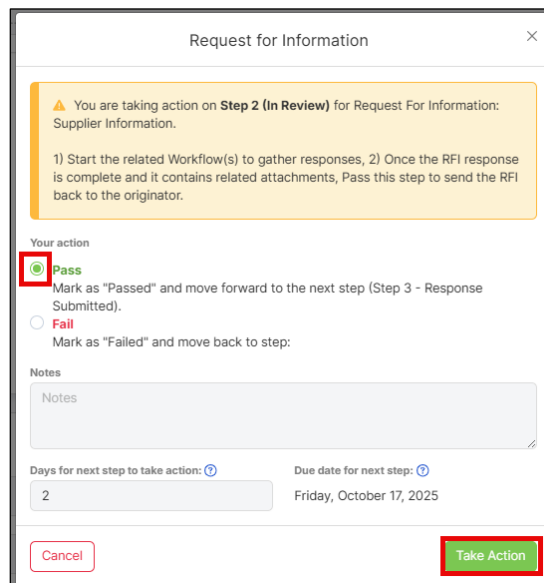
REVIEW ENGINEERING RESPONSE AND RETURN TO INITIATOR

When the **Engineering Response Workflow** is passed by the engineer, it is complete and Document Control is notified. **Document Control** will review the **Response** fields and **document mark-ups** and **Pass** the workflow step for Request for Information Workflow.

- 1) Open the RFI by clicking on the link in the email or navigating to it from the RFI log view.
- 2) Review the **Response**.
- 3) Open and review any new or marked-up **Attachments**.
- 4) Click **Take Action** for the Request for Information workflow.



5) **Pass** the workflow step to move return it to the Initiator.



Request for Information

⚠ You are taking action on **Step 2 (In Review)** for Request For Information: Supplier Information.

1) Start the related Workflow(s) to gather responses, 2) Once the RFI response is complete and it contains related attachments, Pass this step to send the RFI back to the originator.

Your action

☒ **Pass**
Mark as "Passed" and move forward to the next step (Step 3 - Response Submitted).

☐ **Fail**
Mark as "Failed" and move back to step:

Notes

Days for next step to take action: 2

Due date for next step: Friday, October 17, 2025

Cancel Take Action

RELATED RESOURCES

Help Pages:

- [Batch Import Records](#)
- [Adding Attachments to Forms](#)

Related QRGs:

- Create RFIs
- Engineering RFI Review