RFI Quick Reference Guide

This topic provides a reference for the Project Center **RFI** activity center.

Purpose

The **RFI** activity center enables you to effectively log and track RFIs through their approval process.

Audience

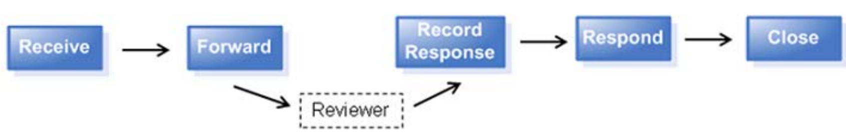
Architects, engineers, construction professionals, and owners.

Key Features

- Streamline RFI management.
- Manage construction-related project information.
- Capture and connect interrelated contract management work processes.

Received RFI Workflow

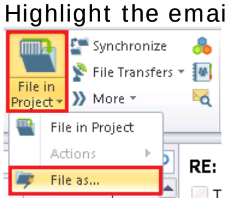
The following workflow options are available for tracking received RFIs in the project. Not all steps have to be used.



To log a received RFI from email

You can log a received RFI directly from an email message.

1. Highlight the email, select the drop down arrow by **File in Project** and then select **File As**.



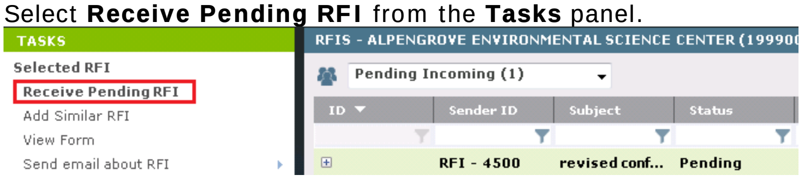
2. In the **Select Project dialog box**, double-click on the corresponding project to select it.
3. In the **File As dialog box**, select the **New Item** radio button and **RFI** from the **Project Item Type** list to log a new RFI. Complete the information in the **Log a Received RFI dialog box** as needed and select **OK**.

To log a received RFI from Info Exchange

External users can be given access to your Info Exchange site so they can send you RFIs directly from the site.

> *See the* ***Project Team Overview*** *for more information on granting external users access to Info Exchange.*

1. You will receive an email notification that a RFI has been sent to you through Info Exchange. Follow the link in the email to the **RFIs** activity center.
2. Select **Receive Pending RFI** from the **Tasks** panel.



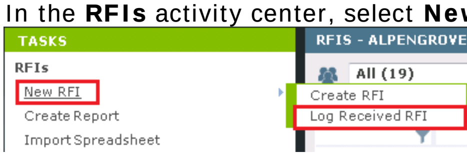
3. Complete the information in the **Log a Received RFI** dialog box as needed and select **OK**.

To log a received RFI from the RFI activity center

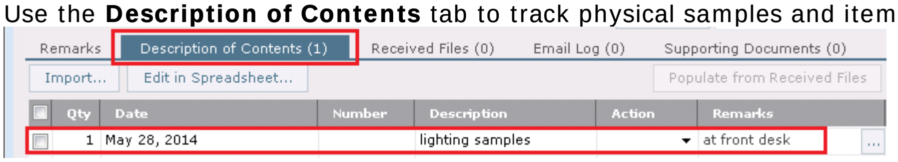
You can also log a received RFI directly through the activity center. This is how you log documents received in hard copy or messages received via phone or fax.

> *Download or scan files needed before logging the RFI.*

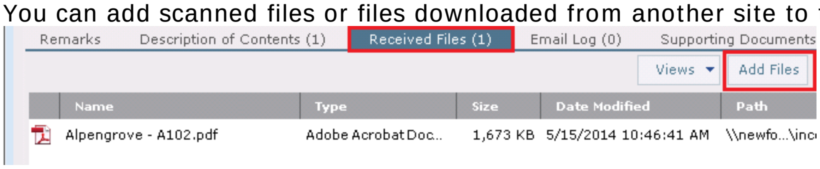
1. In the **RFIs** activity center, select **New RFI > Log Received RFI** from the **Tasks** panel.



2. Complete the information in the **Log a Received RFI** dialog box as needed.
3. Use the **Description of Contents** tab to track physical samples and items.



4. You can add scanned files or files downloaded from another site to the **Received Files** tab.



To forward an RFI for review

RFIs can be forwarded for review to multiple internal and external reviewers.

1. In the **RFIs** activity center, highlight the RFI and select **Forward for Review** from the **Tasks** panel.

2. Select any files to send to the reviewers in the **Select Files to Forward for Review dialog box** and select **OK**.

> *Internal reviewers will see all associated files when they view the RFI through the **RFI** activity center so forwarding files may not be necessary.*

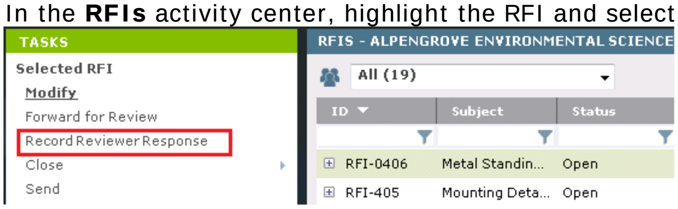
3. Complete the information in the **Forward RFI for Review dialog box** as needed.

> *If you choose to send via email, Newforma prepares a notification email. Look for the Microsoft Outlook icon flashing in the Windows toolbar indicating the email is ready to send.*

To record a reviewer response in the RFI activity center

Reviewers' responses can be recorded in the **RFI** activity center from email or from a response sent through Info Exchange.

1. In the **RFIs** activity center, highlight the RFI and select **Record Reviewer Response** from the **Tasks** panel.



2. Record your comments in the **Response** box on the **Response** tab.

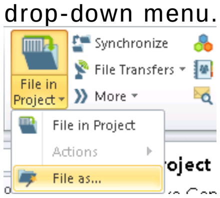
3. Add any files to the **Associated Files** tab.

4. Select **Record Response** to save your changes.

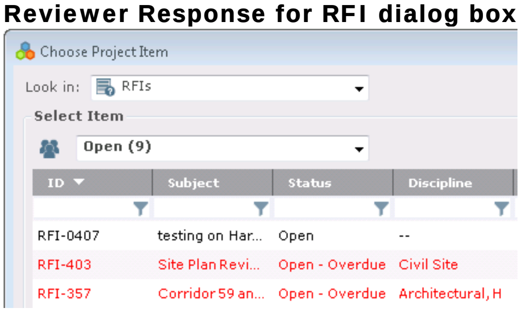
To record a reviewer response from email

When a reviewer responds to a RFI via email, you can record the response directly from Outlook.

1. In Outlook, highlight the email you want to log as a reviewer response, then select the drop-down arrow for the **File in Project** button in the **Project Center Add-In for Microsoft Outlook** toolbar. Select **File As** from the drop-down menu.



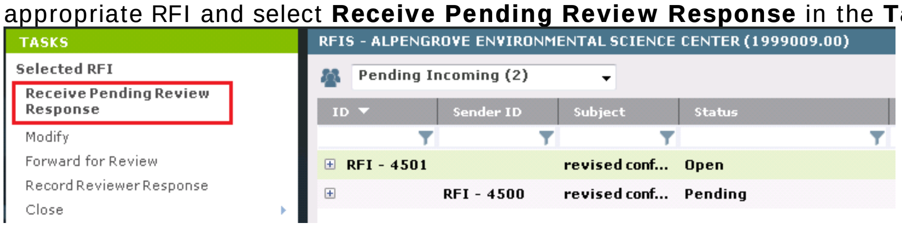
2. In the **Select Project dialog box**, double-click on the corresponding project to select it.
3. In the **File As dialog box**, select **Reviewer Response** and select **RFI** as the **Project Item Type** to pick from the list of expected RFIs in the **Choose Project Item dialog box**. Complete the information in the **Record Reviewer Response for RFI dialog box** as needed.



To record a reviewer response from Info Exchange

Reviewers can respond to a RFI through Info Exchange. You will receive an email notifying you of the sent response.

1. In the **RFIs** activity center, select **Pending Incoming** from the category drop-down list. Highlight the appropriate RFI and select **Receive Pending Review Response** in the **Tasks** panel.

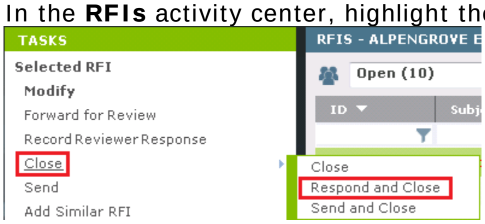


2. Complete the information in the **Record Reviewer Response for RFI dialog box** as needed.

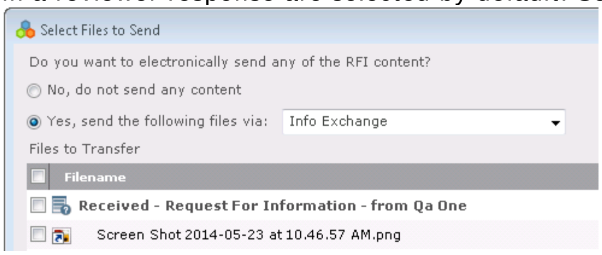
To respond and close

Use this option to track your response to the RFI and close it within Newforma.

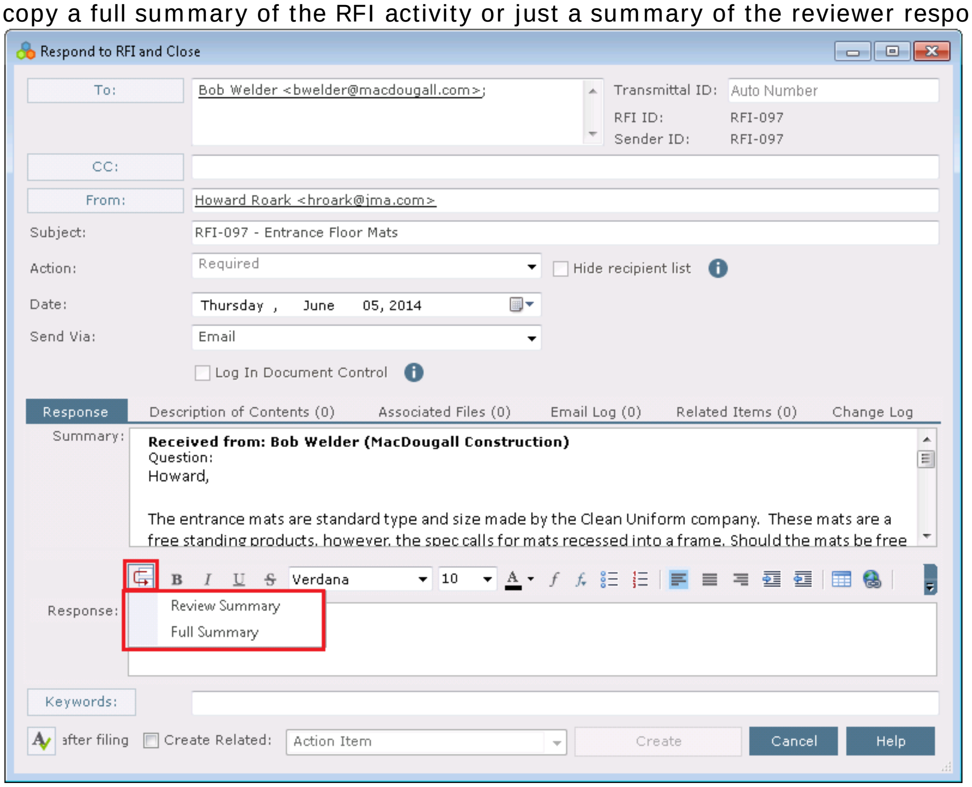
1. In the **RFIs** activity center, highlight the RFI and select **Close > Respond and Close** from the **Tasks** panel.



2. In the **Select Files to Send dialog box**, select any files you want to send with the response. Any files included in a reviewer response are selected by default. Select **OK**.



3. Complete the information in the **Respond to RFI and Close dialog box**. You can use the response widget to copy a full summary of the RFI activity or just a summary of the reviewer responses in the **Response** field.



4. Select **Create** to close the RFI and create the response.

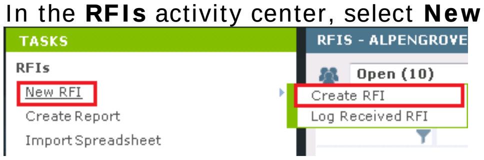
Initiate RFI Workflow

The following workflow options are available for tracking RFIs that you initiate for the project. Not all steps have to be used.

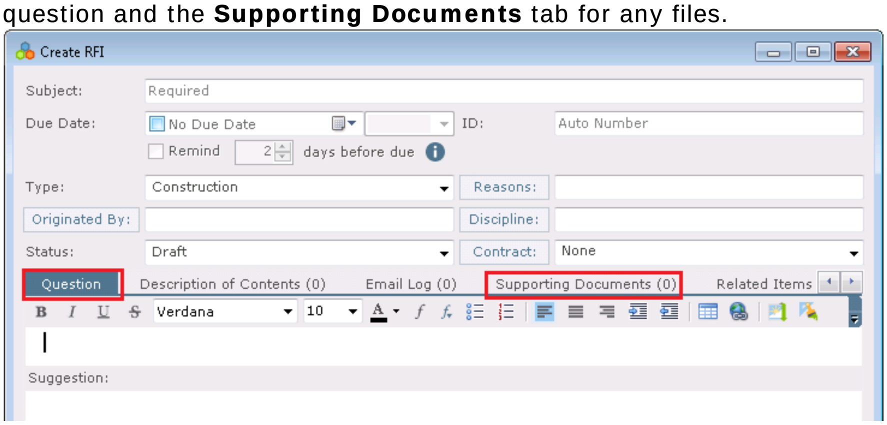
To create an RFI from the RFIs activity center

You can log and track RFIs you create directly through the activity center.

1. In the **RFIs** activity center, select **New RFI > Create RFI**.



2. Enter any information as needed in the **Create RFI dialog box**. Use the **Question** tab for the content of your question and the **Supporting Documents** tab for any files.



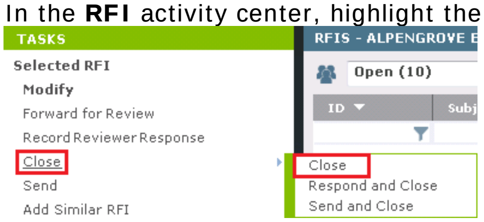
3. Select **OK** to create the RFI.

The new RFI is listed in a Draft state until it is forwarded or closed.

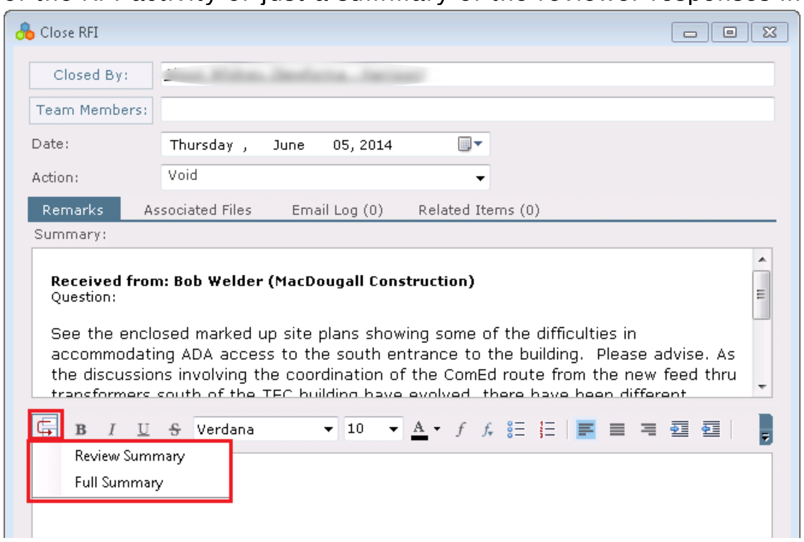
To close an RFI

After sending the RFI for review and recording the reviewer's response as needed, you can log the answer and close the RFI in Newforma.

1. In the **RFI** activity center, highlight the RFI and select **Close > Close** from the **Tasks** panel.



2. Complete the information in the **Close RFI dialog box**. You can use the response widget to copy a full summary of the RFI activity or just a summary of the reviewer responses in the **Response** field.



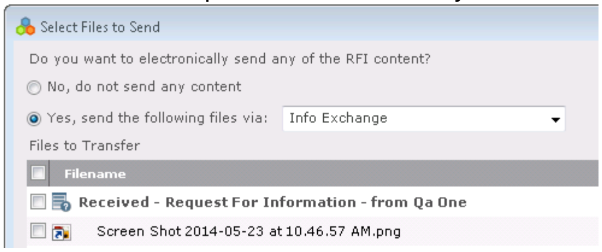
3. Select **OK** to close the RFI.

To send and close an RFI

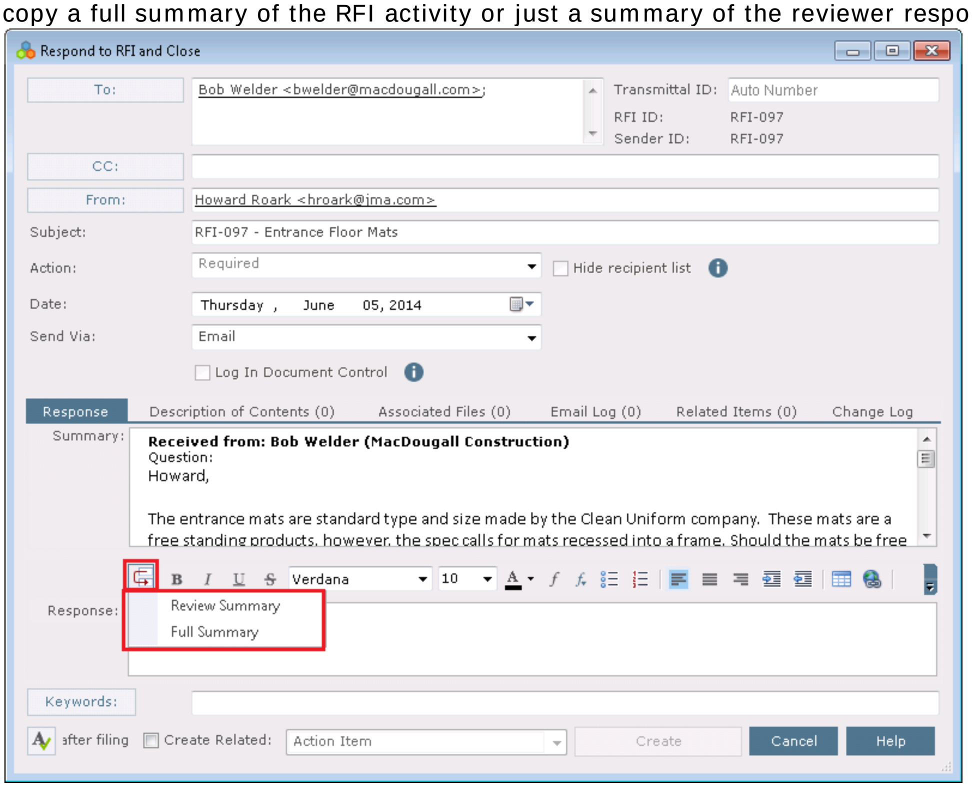
Use this option to track your response to the RFI and close it within Newforma.

1. In the **RFIs** activity center, highlight the submittal and select **Close > Respond and Close** from the **Tasks** panel.

2. In the **Select Files to Send dialog box**, select any files you want to send with the response. Any files included in a reviewer response are selected by default. Select **OK**.



3. Complete the information in the **Respond to RFI and Close dialog box**. You can use the response widget to copy a full summary of the RFI activity or just a summary of the reviewer responses in the **Response** field.



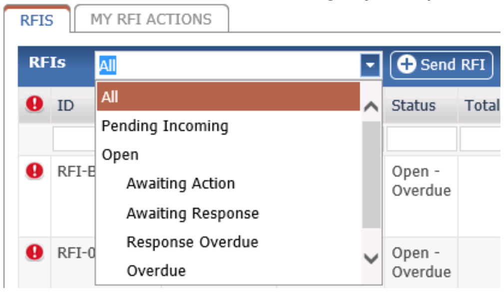
4. Select **Create** to close the RFI and create the response.

To view RFIs on Info Exchange

Internal and external users can see the **RFIs log** on Info Exchange. By default, external users only see items in the workflow that they sent or received.

1. Log into the Info Exchange website and select the project, then select **View > Contract Management > RFIs**.

2. You can use the **RFIs** category drop-down list to filter the list of RFIs by status.



3. You can view the workflow for any RFI.

4. When you need to access the data in different formats you can export to a variety of file formats from the website.