PM4 + Partners
Knowledge Articles

Working with RFIs for Consultants and the Design Team
Contents

Working with Requests for Information (RFIs) ....................... 1
  Quick Start ........................................................................................................... 2
  Monitoring and Tracking RFIs ............................................................................ 4
    Count tiles ........................................................................................................... 4
    Tabbed lists - view filtered by label ................................................................. 4
    Navigation pane menu ...................................................................................... 4
  Processing RFIs .................................................................................................. 5
    RFI statuses and the review process .............................................................. 5
    Locating an open RFI in your Workspace ..................................................... 6
    Receiving the open RFI package as an email ................................................... 6
    Reviewing an open RFI ..................................................................................... 7
    Responding to the RFI ....................................................................................... 7
    Returning the RFI review to PCL .................................................................... 9
  Managing Sub-Consultant reviews as a Primary Consultant ...... 10
    Setting up sub-consultant routing for the RFI reviews ................................. 10
      Adding recipients to sub-consultant routing ............................................. 11
      Removing recipients from sub-consultant routing ...................................... 12
    Sending the RFI to the sub-consultant(s) for review ................................. 12
    Monitoring the Sub-Consultant Reviews ...................................................... 13
  Reviewing the RFI as a Sub-Consultant ..................................................... 14
    Accessing the RFI to review ........................................................................... 14
    Completing the review as a Sub-Consultant ............................................... 14
Working with Requests for Information (RFIs)

PCL employees create RFIs, often in response to a subcontractor initiating a request for an RFI. PCL decides whether an RFI requires an answer from the project design team and assigns the primary consultant to respond to the RFI. If the open RFI appears in your workspace, then PCL is requesting your response to address the RFI.
## Quick Start

### What you need to know to get started without delay

In PM4, the main action you take to respond to RFIs assigned to your company that are in an Open status.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Open workspace</strong></td>
<td><img src="image" alt="RFI management (external)" /></td>
</tr>
<tr>
<td><strong>Open list of open or overdue RFIs</strong></td>
<td><img src="image" alt="6 Open RFIs" /> <img src="image" alt="6 Overdue RFIs" /></td>
</tr>
<tr>
<td><strong>Select RFI</strong></td>
<td>From list, select the RFI no link to open the details view</td>
</tr>
<tr>
<td><strong>Download RFI package</strong></td>
<td>General tab &gt; RFI Details pane</td>
</tr>
<tr>
<td><strong>Review</strong></td>
<td>Review the open RFI package and determine how to proceed</td>
</tr>
<tr>
<td><strong>Provide Answer</strong></td>
<td>From the action pane, select <strong>Edit</strong> (icon changes to <strong>Save</strong>)</td>
</tr>
<tr>
<td></td>
<td>Open the <strong>Answer</strong> fast tab; <strong>Add</strong> response to the <strong>Answer</strong> field</td>
</tr>
<tr>
<td><strong>(Optional) Upload attachments for the Answer</strong></td>
<td><img src="image" alt="Attachments" /> Add attachment View attachments</td>
</tr>
<tr>
<td><strong>Step</strong></td>
<td><strong>Action</strong></td>
</tr>
<tr>
<td>----------</td>
<td>------------</td>
</tr>
<tr>
<td><strong>Complete ANSWER DETAILS fields</strong></td>
<td><img src="image1.png" alt="Image" /></td>
</tr>
</tbody>
</table>
| **Update status** | ![Image](image2.png)  
Update the status to “In PCL review” to indicate the review is complete and ready for PCL to review  
Alternatively, you can send the review for sub-consultant review first |
Monitoring and Tracking RFIs

Count tiles

The Open RFIs tile and the Overdue RFIs tile display the number of RFI requiring a response and an indication of their urgency. Select a tile to view the list of RFIs which require a response.

Tabbed lists - view filtered by label

Open RFIs lists all RFIs assigned to your company that require a response. Select an RFI from the list to review and to provide a response.

Overdue RFIs lists all RFIs assigned to your company where the response is overdue.

RFIs with cost impact lists only RFIs assigned to your company where a cost impact was identified.

RFIs with schedule impact lists only RFIs assigned to your company where a schedule impact was identified.

All RFIs lists all the RFIs created for the project regardless of assigned responsibility for a response. This list is view only.

Closed RFIs lists all RFIs that are closed.

Navigation pane menu

Under the Modules group in the navigation bar, go to Project administration > Requests for information > RFI log

Note: This action opens the same view of the RFI log as selecting the All RFIs tabbed list
Processing RFIs

The RFI management workspace provides several options for accessing the RFIs in PM4+. Each list or tile presents a different view of the information (as indicated by the label) to make it easier for you to process your RFIs quickly and efficiently.

RFI statuses and the review process

When PCL determines an RFI needs a consultant review and response, they generate an open RFI package and send it to the primary consultant. An email alert may be sent to your company to inform them about the review. It is important that you regularly monitor the RFI Management workspaces for RFIs requiring responses, especially if the project team determines no email alerts will be sent.

The RFI review process can be tracked by the status of the RFIs as shown in the image below:
The following table describes the different statuses for RFIs, when each status change occurs, and who is responsible at each stage:

<table>
<thead>
<tr>
<th>RFI Status</th>
<th>Handled by ...</th>
<th>Action to take ...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Draft</td>
<td>RFI Coordinator/PCL Reviewer</td>
<td>Complete and send to Design Team</td>
</tr>
<tr>
<td>Open</td>
<td>Design Team</td>
<td>Review RFI Provide response and supporting documents May be sent to sub-consultants for their input</td>
</tr>
<tr>
<td>In PCL review</td>
<td>PCL Reviewer</td>
<td>Review response and supporting documents to ensure completeness When complete, change status to &quot;Closed&quot;</td>
</tr>
<tr>
<td>Closed</td>
<td>PCL Reviewer</td>
<td>No action required Communication sent to subcontractor and other parties depending on distribution settings</td>
</tr>
</tbody>
</table>

**Locating an open RFI in your Workspace**

After PCL completes their initial review, they create an open RFI package. This package contains the package cover and all relevant information, including selected attachments, bundled into a single PDF file.

RFIs with an “Open” or an “Overdue” status require your attention and response.

**Note:** The overdue RFIs are included in the open RFI list.

To access the open RFIs, select:

- Open RFIs tile or Overdue RFIs tile or
- Open RFIs tabbed list or Overdue RFIs tabbed list

Either choice only displays the records in an “Open” status assigned to your company. From the list, you can select the RFI you wish to respond to by selecting the hyperlink for the RFI in the RFI no column.

**Receiving the open RFI package as an email**

If you are working in the PM4+ Partners workspace, you may receive an email notification that RFIs require your review. The email contains a link to your PM4+ dashboard and may contain the RFI package as an attachment or a link to an attachment. Select the link to open PM4+ and access the RFIs to review.

**Note:** How you receive this notification is determined by the Project Manager and Design Team.
Reviewing an open RFI

To review, download the package.

1. In the list of open RFIs, select the RFI no link for the RFI to review.

   ![RFI-00029](image)

   The system opens the details view of the RFI.

2. If not open already, select the General tab.

3. In the RFI details pane, select the package (”), icon

   ![RR details](image)

   The system downloads the open RFI package.

   **Note:** Your browser settings determine where and how the package downloads. You may be able to open the package immediately; or you might need to go to your Downloads folder, locate the package and then open in your PDF editor.

4. Review the contents of the open RFI package.

5. Determine whether your response should include input from any sub-consultants.

6. If needed, send the RFI to the sub-consultants for their input.

   For more information about incorporating reviews from sub-consultants, see the Managing Subconsultant reviews as a Primary Consultant section.

   The Consultant coordinating the reviews receives an email notification when the sub-consultant reviews are complete.

Responding to the RFI

1. Gather the information necessary to address the RFI.

   This process includes locating any additional attachments to include with the RFI and if you are the primary consultant reviewing the input from the subconsultants.

2. When you are ready to provide your response, locate the RFI in the list and select the RFI no link to open the detail view for the RFI.

3. Ensure that you are in the General tab.

4. Click Edit

5. **(Optional) Add** a potential solution in the Proposed solution field, including any attachments.
6. In the **Answer** fast tab at the bottom of the pane, select **Add** to update the **Answer** field with your response.

The Add to answer dialog opens with a rich text editor field for entering your response.

7. Enter your response into the text field.

8. Click **Save**

9. (Optional) Open the **Attachments** drop-down and select **Add Attachment** to upload any additional attachments for the **Answer** or view any attachments.

Note: You can also choose to View attachments that were already uploaded.

10. Open the **Comments** tab to add any comments to the RFI.

11. Open the **General** tab and select your name from the **Answered by** drop-down menu in the **ANSWER DETAILS** field group.

12. Select the **Answered date** field and select the correct date from the calendar.
Returning the RFI review to PCL

Once you are satisfied with the response to the RFI, you can return the RFI to PCL for their review.

1. From the **Change status** drop-down, select **In PCL review**

The system changes the status of the RFI to “In PCL Review” and removes the record from the **Open RFIs** lists. It is still available in the **All RFIs** tabbed list.

PCL receives notification of the reviewed RFI and responds accordingly.
Managing Sub-Consultant reviews as a Primary Consultant

As part of the review cycle, the primary consultant can assign one or more sub-consultants to review an RFI. When the sub-consultants are assigned as reviewers, they are also given a review order. PM4+ follows the review order when sending out the emails used for managing the sub-consultant reviews (“routing”) and to determine when a reviewer can provide their response. The primary consultant can choose to notify all the reviewers at once when a package is available for their review or only notify the first reviewer(s) at the beginning of the review order.

After each sub-consultant completes their review, they indicate their review is complete. PM4+ sends an email notification to the reviewers assigned to the next level in the review order so that they can now complete their review. If more than one reviewer is assigned to the same review order, the reviewer(s) next in the review order must wait until all reviewers at the previous review order have completed their reviews and indicate they are done. If only one sub-consultant reviewer is providing a review or when all the reviews by the sub-consultants are complete, the primary consultant is notified that the sub-consultant reviews are complete and they can finish preparing the package to return it to PCL.

Setting up sub-consultant routing for the RFI reviews

As a courtesy, PCL may have already added an email routing for the reviewers to an RFI. This routing can be retained or removed as required.

Note: If a record was already reviewed and submitted to PCL, and it now requires another review by the consultant and the sub-consultants, new routings for the sub-consultants must be added.
The following steps guide you through the process for setting up the email routing to manage the sub-consultant reviews:

**Adding recipients to sub-consultant routing**

You can add sub-consultant routing manually or by applying a template.

1. In the RFI log view, open the RFI record which needs sub-consultant routing set up.
2. Open the **Sub-consultant routing** tab.

**Manual Routing**

1. In the **Sub-consultant routing** pane, select **Add**
   
   A new line is added to the table and the first item defaults as a “1” for the **Review order**. This means that this recipient is assigned as the first sub-consultant reviewer. You can update this field if you add more reviewers and want to change the order in which they complete their reviews.

   **Note:** The Review order determines the order in which the sub-consultants must complete their reviews. Those assigned a value of “1” being the first to complete their review, followed by those assigned a Review order of “2” and so on. More than one reviewer can be at the same level. All reviews for a specific review order must be complete before the primary consultant or the next set of reviewers is notified.

2. From the **Company field** drop-down, select the company.
   
   This list shows the companies identified as “Consultant” on their **Job Contact Company** record.

3. Click **Select**
   
   If there is only one contact for the company, the person’s name defaults into the **Person** field.

   If the **Person** field is empty, more than one person is available for selection from the Job Contact Company record. Open the **Person** field drop-down and select a contact person.

4. Verify an **Email address** is available for the selected **Person**. If an email is not available, notify PCL that a contact person is missing an email address.
   
   **Note:** An email address is only required for the primary consultant or a sub-consultant when they are a system user.

   **Note:** To maintain a newly added recipient, you must **Save** your change first.

**Apply the Routing Template**

The **Select sub-consultant routing** drop-down menu contains a pre-defined list of recipients. When selected, the list of recipients is copied to the RFI record and replaces any existing routing. This drop-down list only displays active routings for RFIs or those designated as **All**.

1. Open the **Select sub-consultant routing** drop-down menu.
2. Select the desired routing record based on the **Discipline**.
3. Select **OK**
   
   **Note:** If you picked an incorrect record, you can choose an alternate template and the current records are replaced with the new selection. The system does not add more reviewers to the list through this process. If you require additional reviewers after applying the routing template, use the manual process described above.
Removing recipients from sub-consultant routing

Sub-consultants can be removed from the Sub-consultant routing table if they have not yet participated in the review process.

1. To remove a recipient, click in the selection (check mark) field to the left of the recipient line to select the line.
   - A check mark indicates when a line is marked for removal.
2. Select Remove
3. When the confirmation dialog opens, choose Yes to complete the action or No to cancel it.
   - If Yes, the record is removed.

Sending the RFI to the sub-consultant(s) for review

1. From the RFI Management workspace, select either the Open RFIs tile or the Open RFIs tabbed list.
2. From the list, select the RFI requiring a response.
3. Open the Sub-consultant routing tab.
4. Set up the sub-consultant routing table as described in the Setting up sub-consultant routing for the RFI reviews section.
5. From the available list of Sub-consulting routings, choose either all or only the first sub-consultant(s) by marking your selections using the selection (check mark) field at the left.
   - Once the email is sent, all the sub-consultants can access the review package; however, only those at the top of the review order list can mark their review as complete.
6. Select Send email

The Send email dialog opens. The To recipient list contains all the recipients chosen from the list. If you forgot a recipient, you can manually add them here without having to cancel and re-select from the list. Additional Cc and Bcc recipients can be added as well.

7. At the bottom of the dialog, the Attachments fast tab can be updated to include any attachments that may be relevant to this RFI.

Note: Recipients do not receive a copy of the RFI package in the email. They only receive a link to the record. From there, they can download the current document to review.
8. **Select Send**

   The email request is sent to the selected Sub-consultant. If you select the Associations you can see the Transmission record “Sent – Review routing”.

### Monitoring the Sub-Consultant Reviews

When the system sends an email to a recipient in the review process, it creates a transmission record which is associated with the RFI record. In the **Associations** tab of the RFI record, the system shows the number of associations created, including transmissions, as a number in parentheses beside the **Associations** tab name.

When an RFI review is overdue from the consultant and sub-consultant reviews are not completed, the system can send reminder emails to the review participants who have not submitted their reviews. These reminder emails are sent at a frequency determined by PCL.

When a sub-consultant indicates that their review is complete, the system sends an email to the next recipient in the review order – either another sub-consultant or the primary consultant.

A review of the **Sub-consultant routing** tab on the RFI shows PCL and the primary consultant when each sub-consultant completes their review and the length of time between when a notification was initially sent to when a review was completed.
Reviewing the RFI as a Sub-Consultant

As a sub-consultant your RFI Management workspace looks and functions much the same way as for the primary consultant; however, the functionality is limited to reviewing the RFIs assigned to you. You cannot access the RFIs to review through the Open RFIs or the Overdue RFIs tabbed lists and tiles.

If you are a primary consultant with an additional role as a sub-consultant, RFIs requiring your review as a sub-consultant are accessed as indicated below. These RFIs do not appear in the Open RFIs or the Overdue RFIs tabbed lists and tiles.

Accessing the RFI to review

The email alerting you that an RFI is ready for your review contains a link to the RFI. If you select the link, you must log in, and the RFI record you need to review opens.

If the link doesn’t work, do the following:
1. Log into PM4+
2. Select the tile to open your workspace
3. Open the All RFIs tabbed list
4. Find the RFI referenced in the email
   Note: You can use the Filter/search field at the top of the list to locate the record.
5. Click the RFI no link to open the RFI record in details view.

Completing the review as a Sub-Consultant

1. Review the open package and respond to the RFI as described in the Responding to the RFI section.
2. When you have completed your review, select Review complete in the action pane.

An email is sent to the next reviewer as defined by the review order. This reviewer is either the next sub-consultant in the review order, or, if this is the last review, to the primary consultant to let them know the sub-consultant review process is complete.