PM4 + Partners
Knowledge Articles

Working with RFIs for Consultants and the Design Team

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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>![RFI management (external)]</td>
</tr>
<tr>
<td><strong>Open list of open or overdue RFIs</strong></td>
<td>![6 Open RFIs, 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 Answer fast tab; Add response to the Answer field]</td>
</tr>
<tr>
<td>(Optional) Upload attachments for the Answer</td>
<td>![Optional] Upload attachments for the Answer]</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>----------------</td>
<td>--------</td>
</tr>
<tr>
<td>Complete ANSWER DETAILS fields</td>
<td><img src="image_url" alt="Image" /></td>
</tr>
<tr>
<td>Update status</td>
<td><img src="image_url" alt="Image" /></td>
</tr>
</tbody>
</table>

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.
Monitor and Locate 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 where your company has primary responsibility to manage and return the RFI to PCL, and/or where your company is next in line to respond, based on the Sub-consultant routing tab in the RFI.

Overdue RFIs lists all RFIs where your company has primary responsibility to manage and return the RFI to PCL, and the due date has elapsed.

RFIs with cost Impact lists all RFIs where a potential cost impact was identified, and your company has primary responsibility to manage and return the RFI to PCL, and/or where your company is next in line to respond, based on the Sub-consultant routing tab in the RFI.

RFIs with schedule Impact lists all RFIs where a potential schedule impact was identified, and your company has primary responsibility to manage and return the RFI to PCL, and/or where your company is next in line to respond, based on the Sub-consultant routing tab in the RFI.

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 in a status of ‘Closed’.

Navigation pane menu

Use this method to navigate directly to the entire RFI log, instead of using the RFI workspace to navigate. 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
Understand RFI Management in PM4+

As explained in detail in the prior section, the RFI management (external) 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 RFI open package (PDF file) and send it to the Primary Consultant responsible for coordinating and returning the RFI to PCL. An email alert may be sent to your company to inform about the RFI’s status. It is important that you regularly monitor the RFI Management (external) workspace 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 standard statuses an RFI undergoes, whose court the RFI is in, and what action should be taken by the responsible parties:

<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, generate RFI open package and send to Design Team (i.e., move RFI to ‘Open’ status)</td>
</tr>
<tr>
<td>Open</td>
<td>Design Team, including: Primary consultant, Optional Sub-consultants</td>
<td>Review RFI, Provide response and attach supporting documents, May be sent to Sub-consultants for their input</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Sub-consultant responded and attach supporting documents</td>
</tr>
<tr>
<td>In PCL review</td>
<td>PCL Reviewer / RFI Coordinator</td>
<td>Review response and supporting documents to ensure completeness, When complete, change status to ‘Closed’</td>
</tr>
</tbody>
</table>
| Closed       | RFI Initiator, RFI Coordinator, Any other parties included in the ‘Closed’ status email notification | Initiator or the RFI receives the RFI closed package via email and takes action as directed in the ‘Answer’ portion of the PDF  
|              |                                                                                  | The RFI Coordinator ensures the Electronic Plan Room (if in use) is updated accordingly to show the RFI location on the applicable drawings.  
|              |                                                                                  | All other parties are informed.                                                                      |

**Locate 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.

To access the open RFIs, click on the RFI Management (external) workspace tile, and select:

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

From the list, to view the details of the RFI you wish to respond to, click the hyperlink in the RFI no column. This workspace is described in more detail at the start of the document.
Receive the **RFI Open Package as an email**

You may receive an email notification that an RFI requires 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 workspace link to open PM4+ and access the RFIs to review.

**Note:** Set up of notifications is done by the Project Manager or their designate.

**Review an open RFI**

You can either view all the details directly in the RFI record in PM4+, or download the PDF package, which contains all the same information as is found in the record.

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

   ![RFI record image]

   The system opens the details view of the RFI.

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

3. Click on the **Question** and **Proposed solutions** fast tabs to view the text and check for any supporting attachments.

   ![RFI details pane image]

   OR, to review the same details in the RFI open package:

   In the RFI details pane, select the package ( окружаючий кружок) icon

   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 RFI record or open 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.

**Respond 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. These comments do not appear on the final, distributed RFI, but are optional and intended for coordination purposes.

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

The Answered date field fill in automatically with the date on which you change the status back to ‘In PCL review’.
Return the RFI review to PCL

If you find more input is required from other Consultants, if your company is named in the Assigned to field, you can manage Sub-consultant input. See the next section for details.

Once you are satisfied with the RFI response, return it 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 list in the RFI Management (external) workspace.

Because the status of the RFI is no longer ‘Open’, the RFI may be removed from your view if you opened it from the Open RFIs tab.

It is still available in the All RFIs tabbed list.

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

Who does this?

As part of the review cycle, the Consultant primarily responsible for managing and returning the RFI to PCL 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.

Decide: Concurrent or Consecutive review?

The **Review order** determines if responses should be concurrent or consecutive. 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 Sub-consultant reviewers at once, or only notify the first reviewer at the beginning of the review order.

Completing Sub-consultant Reviews

After each Sub-consultant completes their review, adds to the **Answer**, and attaches any relevant supporting files, they indicate their review is complete.

PM4+ sends an email notification to the next Sub-consultant(s), as indicated by the **Review order**. 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. When all the reviews in the ‘Sub-consultant routing’ tab are marked as **Review complete**, the Primary Consultant is notified. At this point, they can conduct a final review and return the RFI to PCL.

Primary Consultant Completes Sub-consultant Reviews on the Sub-consultant’s Behalf

If any of the Sub-consultant companies are listed as Sub-consultants on an RFI and they are not collaborating directly in PM4+ for some reason, the Primary Consultant (named in the ‘Assigned to Company’ field in the General tab) may enter the response on their behalf and indicate the completion of their review.

Set up Sub-consultant routing for the RFI reviews

Depending on what your project team agrees on at the start of the project, PCL may have already added pre-created Sub-consultant routings to the 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 routing to manage the Sub-consultant reviews:

Add consultants to sub-consultant routing

You can add Sub-consultant routes manually or apply a pre-created routing template.

1. In the RFI log, click on the RFI no to view the RFI record which needs Sub-consultant routing set up.
2. Click on the Sub-consultant routing tab.

Manual Routing

1. In the RFI, click on the Sub-consultant routing tab
2. Click on the Add button

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 later 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’ are 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.

3. From the Company field drop-down, select the company and click on the Select button

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

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

5. If the Email field is blank, notify PCL that a contact person is missing a primary email address.

6. When multiple lines exist, determine if the Review order is correct. Adjust the number in this field to reflect the desired order. Use the same number in each line if concurrent responses are ok. A mix of concurrent and consecutive is supported.
Apply a 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.

Remove 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.

Send the RFI to the Sub-consultant(s) for review

1. From the log or workspace, select the RFI requiring a response.

2. Click on the **Sub-consultant routing** tab.

3. Set up the Sub-consultant routing table as described in the Set up sub-consultant routing for the RFI reviews section.

4. 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 RFI open package; however, only those at the top of the review order list can mark their review as complete.

5. **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.

6. **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 automatically 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.

7. **Click on the Send button**

   The email request is sent to the selected Sub-consultant. If you select the Associations you can see the Transmission record “Sent – Review routing”.
Monitor 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 (linked) to 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 company named in the *Assigned to company* field.

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.

**Note:** In the event that any portion of the Sub-consultant reviews or responses is provided to the primary Consultant outside of PM4+ (via email, for example), the primary Consultant is able to upload the Sub-consultant’s documentation and responses on their behalf and mark their review as having been completed (new as of August 23, 2020).
Add a Sub-consultant’s Response on their Behalf

If any Sub-consultant in the list is not collaborating directly in PM4+, the Primary Consultant, named in the Assigned to company field, or the PCL RFI Coordinator, may enter the Sub-consultant’s response on their behalf.

1. From the log or workspace, select the RFI requiring a response
2. Click the Edit button if not already in edit mode
3. In the General tab, open the Answer fast tab
4. Click on the Add button to open the text dialog. Type or paste in the Sub-consultant’s response
5. Optionally, click on the Attachments>Add attachments button to include any files they provided
6. Click on the Sub-consultant routing tab.
7. Select the line for the Sub-consultant you are entering on behalf of
8. Optionally, enter text in the Comments field to indicate the source of the response
9. Click on the Mark review complete button
10. Click on the Yes button to confirm this action, when prompted.

The line updates to show the date on which you took this action (in the Review date field). The Modified by field indicates which PM4+ user ID took this action on the Sub-consultant’s behalf. The Offline review completed checkbox is checked to indicate this response was provided outside of PM4+ and added on this Sub-consultant’s behalf.
Review the RFI as a Sub-Consultant

As a Sub-consultant your RFI Management (external) workspace looks and functions much the same way as for the Primary Consultant; however, the functionality is limited to reviewing the RFIs currently in your company’s court, based on the Sub-consultant routing tab’s Review order. You can see and access these RFIs to review through the Open RFIs or the Overdue RFIs tabbed lists and tiles.

The Primary Consultant is the company named in the Assigned to company field. All Sub-consultants expected to participate in the review and response of the RFI are listed in the Sub-consultant routing tab.

Access and View the RFI

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 Open RFIs tabbed list
4. In the list of open RFIs, select the RFI no link for the RFI to review.

The system opens the details view of the RFI.

5. If not open already, select the General tab.
6. Click on the Question and Proposed solutions fast tabs to view the text and check for any supporting attachments.

7. Click on the Answer fast tab to view any portion of the response already submitted by other parties. Check for any supporting attachments.

8. Click on the Add button to open the text editor to enter your portion of the response.
9. Click the Ok button.
10. Click the **Attachments>Add attachment** button to include any supporting documents you’re your response.

11. Optionally, click on the **Sub-consultant routing** tab to see who else is included in the review/response to this RFI.

12. Click on the **Review complete** button 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, in the **Sub-consultant routing** tab. Or, if this is the last review, the email is sent to the Primary Consultant named in the **Assigned to company** field in the **General** tab.