PM4 + Partners Knowledge Articles

Working with RFQs for Subcontractors

r 2

January 30, 2019

Contents

Working with Requests for Quotes (RFQs)

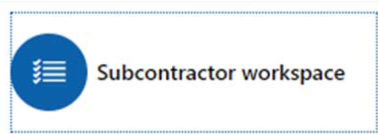
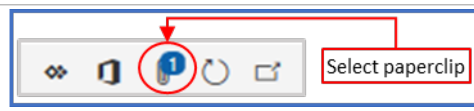
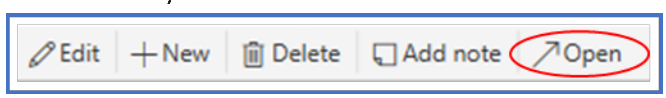
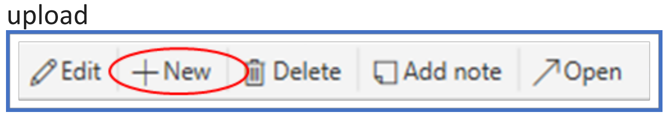
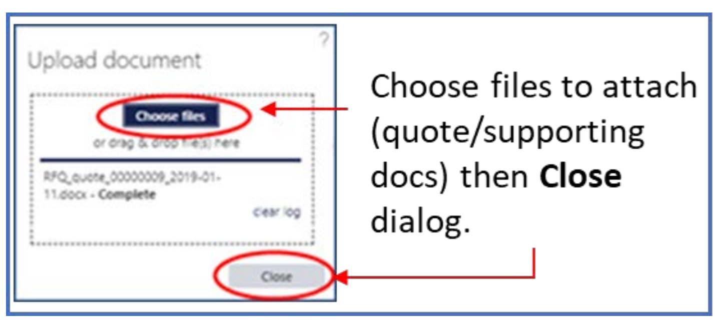
When PCL processes their CRXs, they may find that they need a quote from a subcontractor. They can request this quote manually through email, or by using the CRX workflow if it is enabled. When the request is sent by the CRX workflow, the request for quote (RFQ) appears in the subcontractor workspace so they can respond to it. Once the subcontractor completes their RFQ, they submit their quote back to PCL through the collaborative workspace. PCL reviews the RFQs and determines whether they need more information. Once the RFQ is acceptable to PCL, it is included in the CRX package to be sent the consultant/owner for their approval.

Note: Subcontractors can only see outstanding RFQs for their company. Outstanding CRXs require action from the subcontractor to complete them. They have a status of “Awaiting Submission” or “Awaiting Resubmission”.

Quick Start

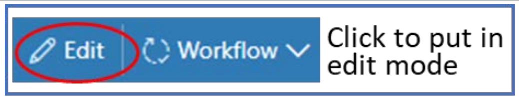
What you need to know to get started without delay.

The main action you will take in PM4+ related to Request for Quote is review the request and prepare upload your quote for PCL to review.

Step	Action
Open workspace	
Open list of requests	
Select request to respond to	Click request ID link to open details 
Review request details	 Download any attachments to review 
Prepare quote	This is an offline process
Upload quote to RFQ record	Open RFQ again; select paperclip again; select **+New** to start upload  Select **Choose files** in the Upload document dialog  Exit the attachments screen.

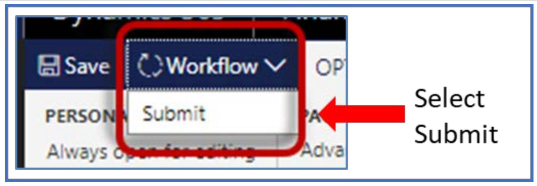
Step	***Action***

Complete quote details

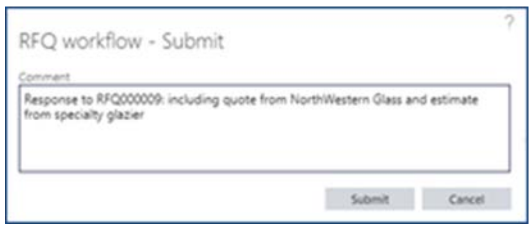


- **Cost impact** = Yes
- **Total amount** = value for the quote
- **Schedule impact** = Yes *(if required)*
- **Number of days** = # of days to complete.
- **Comment** – (optional) info about quote.

Submit quote to PCL

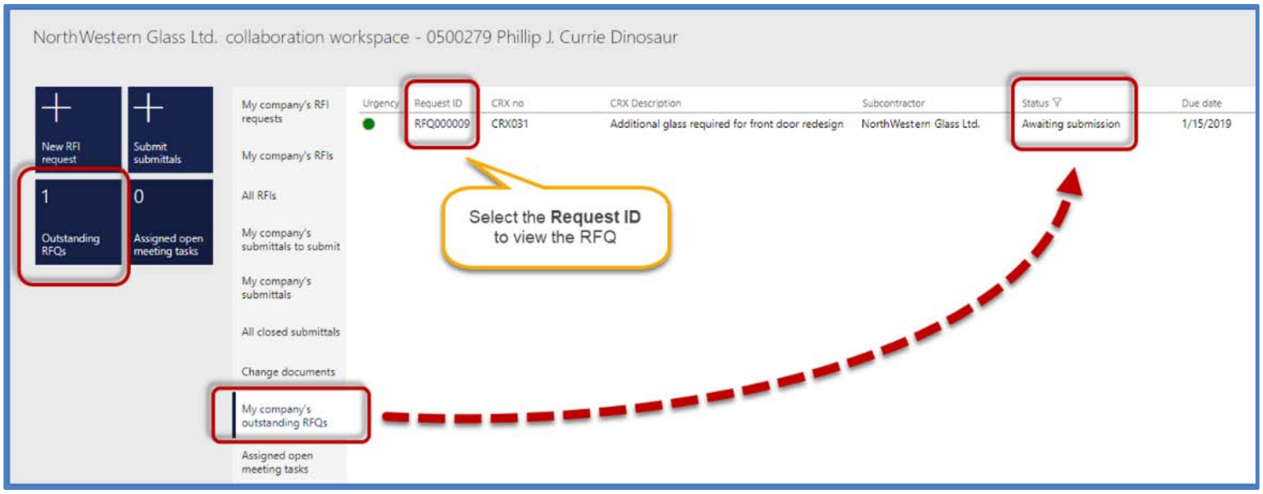


Read and respond to, any confirmation dialogs



Add comment if necessary.
Select **Submit** to send quote to PCL for Review

Viewing and monitoring RFQs assigned to your company

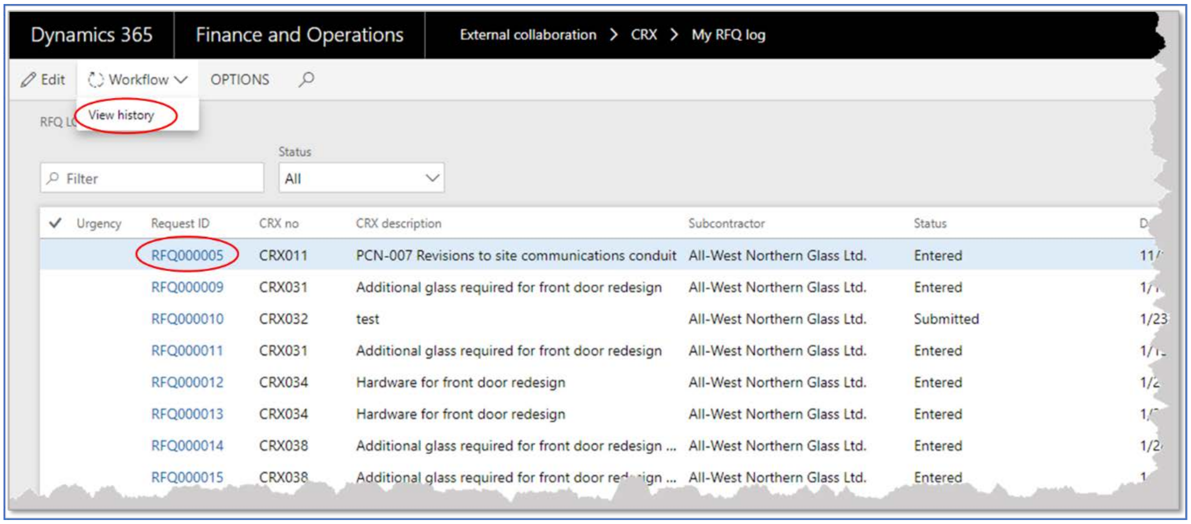


Your company's collaborative workspace provides three ways you can track, monitor the progress and, respond to your company's requests for quotes (RFQs):

Tabbed list	**My company's outstanding RFQs**	In this list you can only see RFQs with a status of "Awaiting submission" or "Awaiting resubmission". These RFQs need to be completed by you and submitted by to PCL for review. This list can also be accessed via the Navigation pane.
Number tile	**Outstanding RFQs**	This tile indicates the total number of RFQs awaiting submittion or resubmission from you. This will match the number of RFQs seen in the tabbed list **My company's outstanding RFQs**. Click this tile to take you to the list filtered by the 'outstanding type' statuses.
Navigation pane	**My RFQ log**	This filtered log list is opened via the by clicking the hamburger icon ( ). This list shows all RFQs whether outstanding or which have been **Submitted** by you to PCL for review or accepted and **Entered** by PCL

My RFQ log

1. Click the hamburger icon ( ) in the navigation bar to open the **Navigation pane**
2. Select **External collaboration** > **My RFQ log**
   The list of all the RFQs for your company displays.



3. To view more details about or to respond to a specific RFQ, select the hyperlink in the **Request ID** field from any RFQ log list.

View workflow history

If you are concerned as to where a certain RFQ is in the process, you can view the workflow history.

1. Select the RFQ to view.
2. From the action pane select **Workflow**.
3. From the drop-down choose **View history**.

   In the Workflow History pane there are are three fast tabs which open to reveal detail information:

   - **General** – who started, when started, current state and last change date.
   - **Tracking details list** – this lists each activity in the workflow process and who performed the action to continue the workflow to the next step.
   - **Tracking details** – you can review the workflow activity details for each step.

Responding to RFQs

When you are ready to answer the quote request you will be able to provide your response from any view of the RFQ log list. However, from within your workspace the easiest would be the following:

- Select the count tile, **Outstanding RFQs** or,
- Select the tabbed list **My company's outstanding RFQs**

These two starting points provide a list of only the RFQs you need to respond to.

Prepare your RFQ Response

1. From the list of outstanding RFQs in your workspace, select the **Request ID** link to open the details view for the RFQ you want to respond to.

   The details view for the selected RFQ opens.

2. Review the RFQ and any attachments (for example, you might review the cover letter from PCL and any other documents provided with the RFQ).
3. (Outside PM4+) Prepare the quote document with the details for the quote.

Attach the quote and other documents to the RFQ

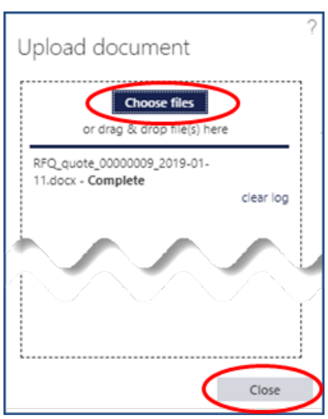
1. Select the attachments icon (📎) in the action pane on the far right.

   The Attachments for Request ID: RFQ##### screen opens.

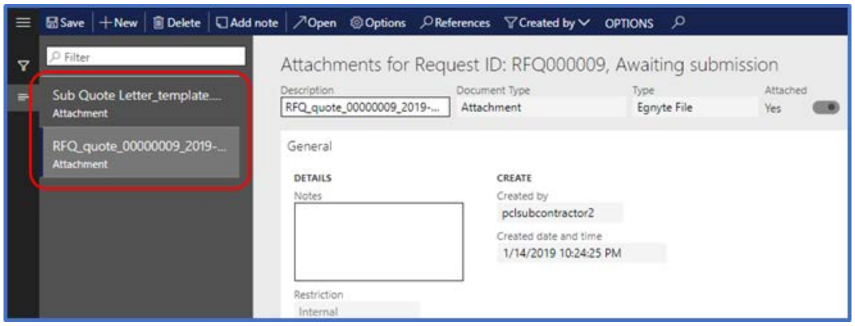
2. From the action pane, select **+New**

   The Upload document dialog opens.

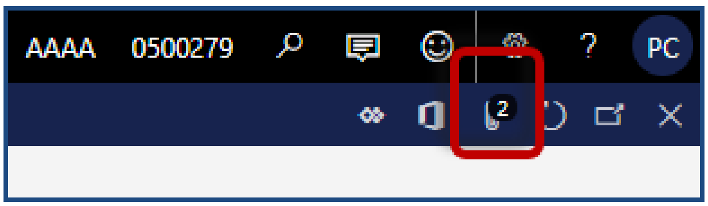
3. Select **Choose files** and navigate to the location where you stored the quote document and any others you want to attach to the RFQ.
4. When the upload is complete, select **Close** to close the Upload document dialog.

The uploaded documents are now available as an attachment for the quote in the Attachments list.



5. Close the Attachments list screen to return to the RFQ screen.

   The attachments icon updates to show attachments were added to the quote.

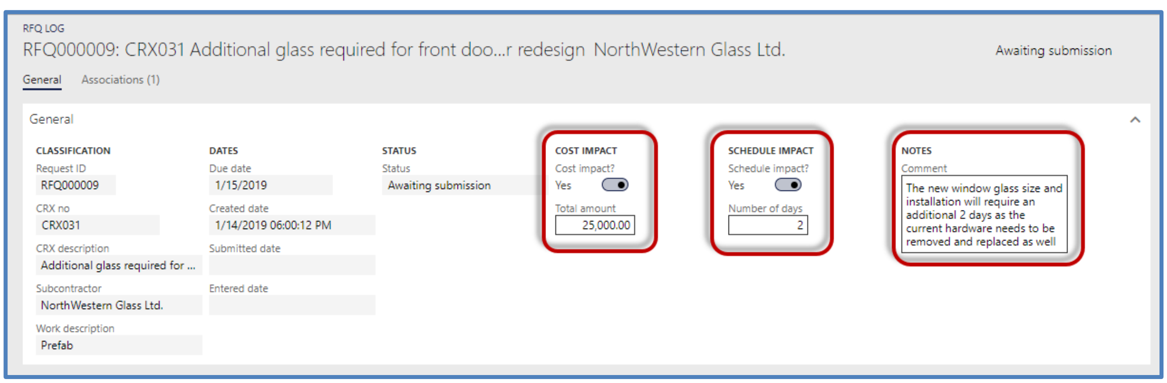


6. Once you are satisfied with the attachments uploaded to PM4+, finish sending the quote back to PCL.

Send the RFQ response to PCL

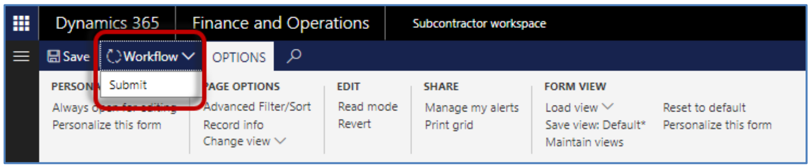
1. Select **Edit** in the action pane.

   The field groups **COST IMPACT**, **SCHEDULE IMPACT** and **NOTES** are open for editing. You are not able to edit any other fields.

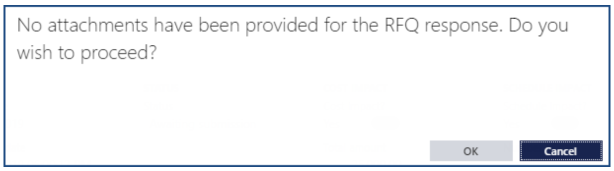


2. Set the **Cost impact** toggle to **Yes**
3. In the **Total amount** field, type the value for the quote.
4. Set the Schedule impact toggle to **Yes** if completing the work effort for the RFQ has a schedule impact.
5. In the **Number of days** field, type the number of days the change will take to complete.
6. In the **Comment** field type any additional information you want to include with the quote.
7. From the action pane select **Save**

8. From the **Workflow** drop-down list in the action pane, select **Submit**

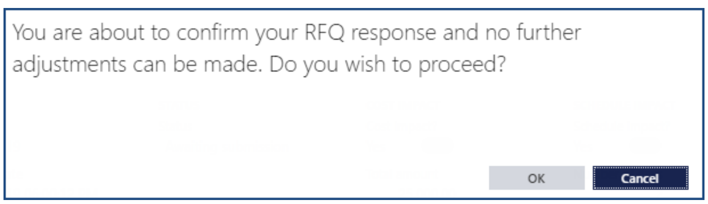


Note: If no documents are attached to the submission, you see a message to confirm that you want to send the quote back without any documents.



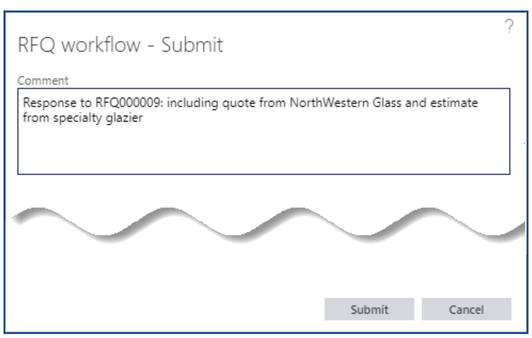
Select OK to send the quote to PCL without any attachments; or, select Cancel to cancel the transmission and return to the workspace so you can add attachments

9. Next, you see a confirmation message informing you that you are about to return the RFQ to PCL, and that you cannot make any more changes to it.



10. Select **OK** to send the quote to PCL; or, select **Cancel** to cancel the submission and return to the workspace to make further adjustments.

The RFQ workflow - Submit dialog opens.



11. In the **Comment** field, add any additional information about the RFQ.
12. Select **Submit** to complete the submission process.

The quote is returned to PCL for their review. The status for the RFQ is automatically updated to "Submitted".

13. To see the change in status for the RFQ, refresh your browser session by pressing **F5** or using the Refresh button for your browser.

Note: you can monitor the progress of your RFQ by looking at the Workflow history or viewing in My RFQ log