



PM4 + Partners Knowledge Articles

Consultant/Design Team Working with RFIs

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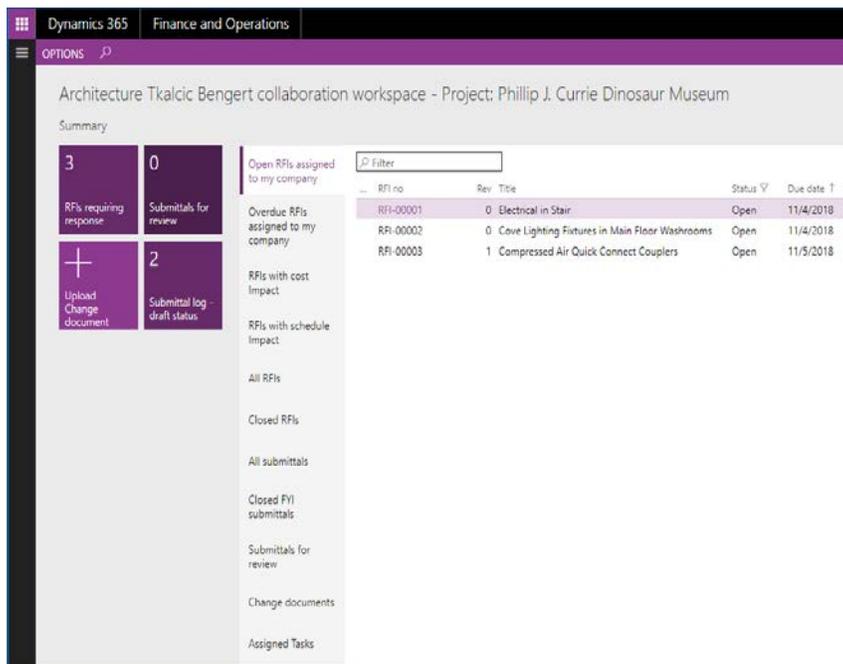


Monitoring and Tracking RFIs

This section describes how to use your company's workspace to monitor and track RFIs for a project.

Navigating to Your Consultant Workspace

1. By default, when you open PM4+, you see the **Consultant workspace** tile.
2. Select the **Consultant workspace** tile to view the workspace for your company.



Monitoring and Tracking RFIs in your Consultant Workspace

By default, two tiles on your company's workspace show a summary of the RFIs requiring response and Submittals for review.

If you select the **RFIs requiring response** tile, a filtered view of the RFI log displays.

If you select the **Submittals for review** tile, the filtered view of the submittals log displays.

Alternatively, select the different list views to see different information about RFIs and Submittals.

RFI statuses

The table below describes the different statuses available for RFIs:

RFI Status	Handled by ...	Action to take ...
Draft	RFI Coordinator/PCL Reviewer	Complete and send to Design Team
Open	Design Team	Review RFI Provide response and supporting documents
In PCL review	PCL Reviewer	Review response and supporting documents to ensure completeness When complete, change status to "Closed"
Closed	PCL Reviewer	No action required Communication sent to subcontractor

The table below describes the list views available in your company's workspace.

Tab Label	Description
Open RFIs assigned to my company	Lists all RFIs assigned to your company that require a response. RFIs can be selected from the list for review and to provide a response.
Overdue RFIs assigned to my company	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 has been identified.
RFIs with schedule Impact	Lists only RFIs assigned to your company where a schedule impact has been identified.
All RFIs	Lists all RFIs that have been created for the project regardless of assigned responsibility for a response. This list is view only.
Closed RFIs	Lists all RFIs that have been closed.
All submittals	All submittals from all subcontractors are displayed in this view regardless of status.
Closed FYI submittals	All submittals with a status of closed where your review was not required.



Locating an open RFI in your Workspace

1. Monitor your company's collaboration workspace to determine when an RFI requires your attention.

The workspace shows several lists and tiles; each showing slightly different information about the RFIs.

Tiles

- RFIs requiring response

Lists

- Open RFIs assigned to my company
 - Overdue RFIs assigned to my company
 - RFIs with cost impact
 - RFIs with schedule impact
 - All RFIs
 - Closed RFIs
2. Select either the tile **RFIs requiring response** OR open the list of **Open RFIs assigned to my company**. Either way, the records displayed will only be those in an Open status and assigned to your company. From the list, select the RFI you wish to respond to by selecting the hyperlink for the RFI in the **RFI no** column.

Architect B collaboration workspace - Project: Phillip J. Currie Dinosaur Museum

Summary

3
RFIs requiring response

4
Submittals for review

Open RFIs assigned to my company

Overdue RFIs assigned to my company

RFIs with cost Impact

RFIs with schedule Impact

All RFIs

Closed RFIs

All submittals

Closed FYI submittals

Submittals for review

C...	RFI no	Rev	Title	Status ▾	Due date ↑	Urgency	RFI date
	RFI-00001	0	Electrical in Stair	Open			6/29/2018
	RFI-00006	0	Electrical	Open	8/20/2018	♦	8/15/2018
	RFI-00029	1	New RFI	Open	10/4/2018	●	9/10/2018



Working with RFIs

Receiving the RFI open package as an email

- Open the RFI package attached to the email or if collaborating with PCL in the project management application click on the link in the email (link to the record or the workspace).

Reviewing an RFI

When the PCL Reviewer receives a request for an RFI, or a new RFI is created or is returned from the consultant, PCL performs a review. The PCL Reviewer then determines the action to take to move the RFI to the next step in the RFI process. Consultants review RFIs when they are in the "Open" status. Before acting on an RFI, several tabs and fields need to be checked to make sure the information they contain is complete and accurate.

The status of the RFI determines the actions and activities that are available to PCL or the Consultant/Design Team when they receive an RFI.

PCL can move RFIs to the next stage in the process when RFIs are in "Draft" or "In PCL Review" status. When an RFI is in "Draft" status, it means that it has been newly created, either by PCL, or by PCL approving a request for an RFI from a subcontractor or other initiator, creating a related RFI, or creating a revision to an RFI. The consultant returns an RFI to PCL after they complete their review and provide a response to the RFI.

1. Go to **Project administration > Requests for information > RFI log**

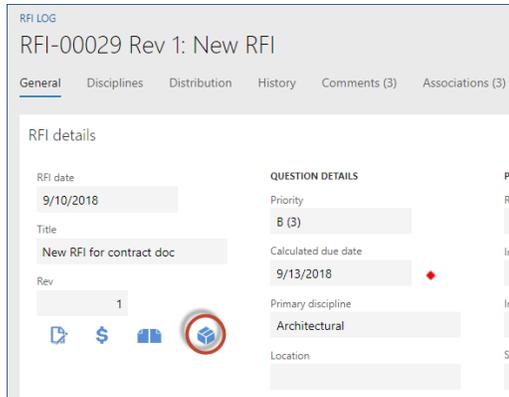
The RFI log displays.

2. Filter the list by status to find all RFIs in "Draft" status or to find all RFIs returned from the consultant with the "In PCL review" status.
3. Select the number in the **RFI no** field to display the details view of the RFI you are wanting to review.
4. On the **General** tab, verify the information is correct and makes sense. If there isn't enough information then makes edits where you can.
5. On the **Disciplines** tab, add any additional disciplines that should be aware of or informed about the RFI.
6. On the **Distribution** tab, confirm or set the distribution options for each status.
7. On the **Associations** tab, verify that all the associations for the RFI exist. If the document mentioned in the RFI request document reference fast tab isn't added as an association, add it or notify PCL about the omission.
8. Once you complete the review, provide your response to the RFI.



Responding to an open RFI

1. After revising the RFI, open the open RFI package by clicking the package () icon on the **General** tab.



RFI LOG
RFI-00029 Rev 1: New RFI

General Disciplines Distribution History Comments (3) Associations (3)

RFI details

RFI date: 9/10/2018

Title: New RFI for contract doc

Rev: 1

QUESTION DETAILS

Priority: B (3)

Calculated due date: 9/13/2018

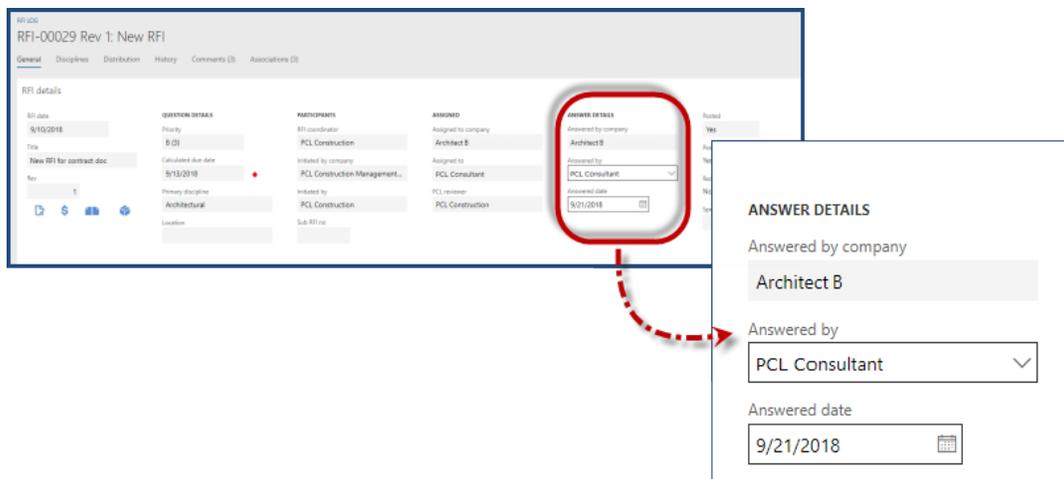
Primary discipline: Architectural

Location:

The system downloads the open RFI package.

Note: The browser determines the way the RFI packages are downloaded. In Chrome, the packages are downloaded to the **Downloads** folder on your computer and can be accessed from the footer section of the browser; in Edge, you have the option to open or save the package.

2. Review the contents of the open RFI package.
3. Gather the information to address the RFI. This process includes locating any additional attachments to include with the RFI.
4. When you are ready to respond to the RFI, open it and click **Edit**
5. Update the **Answer** field on the RFI with your response.
6. Add any additional attachments to the Answer field of the RFI.
7. Add any comments to the RFI in the **Comments** tab.
8. Under the Answer Details group on the **General** tab, select your name from the **Answered by** drop-down menu.
9. From the **Answered date** calendar, select the current date.



RFI LOG
RFI-00029 Rev 1: New RFI

General Disciplines Distribution History Comments (3) Associations (3)

RFI details

RFI date: 9/10/2018

Title: New RFI for contract doc

Rev: 1

QUESTION DETAILS

Priority: B (3)

Calculated due date: 9/13/2018

Primary discipline: Architectural

Location:

PARTICIPANTS

RFI coordinator: PCL Construction

Initiated by company: PCL Construction Management...

Initiated by: PCL Construction

Sub RFI no:

ASSIGNED

Assigned to company: Architect B

Assigned to: PCL Consultant

Initiated by: PCL receiver

Initiated by: PCL Construction

ANSWER DETAILS

Answered by company: Architect B

Answered by: PCL Consultant

Answered date: 9/21/2018



10. Click **Submit** in the action pane.

If enforced distribution is not enabled, an error message displays to warn you that an email will not be sent to PCL to notify them that the status for the RFI is changed and they will need to take action.

11. Click **Yes** to continue with the status change (no email will be sent; however, the RFI will change status and appear in the PCL reviewer's workspace); or click **No** to not continue and to discuss further with the RFI Coordinator.

12. Verify the RFI was submitted to PCL by reviewing the RFIs waiting for your response. The RFI you submitted should no longer show up in the tile **RFIs requiring response** nor in the list **Open RFIs assigned to my company**.

In the **All RFIs** list in the Consultant workspace, it will now have a status of "In PCL review".

Architect B collaboration workspace - Project: Phillip J. Currie Dinosaur Museum

Summary

2 RFIs requiring response | 4 Submittals for review

Open RFIs assigned to my company

Overdue RFIs assigned to my company

RFIs with cost Impact

RFIs with schedule Impact

All RFIs

Closed RFIs

C.	RFI no	Rev	Title	Status	Due date	Urgency	RFI date	Days overdue
	RFI-00029	1	New RFI	In PCL review	9/30/2018		9/10/2018	1

