PM4 + Partners Knowledge Articles

Subcontractors
Working with RFIs

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November 30, 2108

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Monitoring and Tracking Requests for RFIs and RFIs

You can track and monitor the progress of your company's RFI requests through your company's specific collaborative workspace. You will be able to monitor your company's RFI requests and RFIs derived from your RFI requests as well as any RFIs created by other companies on the project.

Important: It is recommended that you read the topic "[Welcome to the PM4+ Partners Collaboration Workspace](#)" before starting any tasks in PM4+.

Navigating to your Company's Workspace

1. By default, when you open PM4+, your only option will be to select the **Subcontractor workspace** tile.

2. Selecting the **Subcontractor workspace** tile opens the workspace for your company.

   Note: Your company's name should proceed the words "collaboration workspace".

My Company's RFI requests

You can use the **My company's RFI requests** tabbed list to monitor the RFI requests created for your company. The Status column provides important information about where the Request for RFI is currently in the RFI process and what, if any, action may be required. Like the other columns in the list, this column can be filtered and/or sorted to provide you with different views of this information. To view more details about a specific RFI request record, select the hyperlink in the **RFI request no** field.

RFI Request Statuses

If an RFI request is in the "Draft" or "Requested change" status, then it needs to be completed and submitted for PCL review.

The table below describes the different statuses available for RFI requests:

RFI request

Status	Handled by	Action to take
Draft	Subcontractor	Complete and submit RFI request to PCL
Submitted	RFI Coordinator	Review request and determine action to take
Requested change	Subcontractor	Update request as per RFI Coordinator's request and re-submit to PCL
PCL Answered	Subcontractor	No action required Response provided by PCL
In review	PCL Reviewer	Review the request to ensure all the information provided is clear Update the status after completing the review
Approved	RFI Coordinator/PCL Reviewer	Approve request Request becomes a full RFI

My Company's RFIs

When the status of your company's RFI request is "Approved", this means that it has been translated into an RFI that needs to be reviewed by other parties. In this situation, viewing the **My company's RFIs** list can assist you with monitoring the progress of your company's approved RFI requests. The process an RFI follows is different than for a RFI request. To process an RFI, PCL provides the information from your RFI request to the Design Team (consultants, designers, architects, etc.) for their answer. Once the Design Team provides their answer, PCL determines how to handle and route the RFI to resolve it. When an RFI is closed, the RFI has a satisfactory answer and you will be communicated with accordingly.

RFI statuses

If an RFI request is in the "Draft" or "Requested change" status, then it needs to be completed and submitted for PCL review.

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

Exploring RFIs created by other companies

To discover whether a question you need to ask has already been raised, use the **All RFIs** list. This list displays all RFIs regardless of the company which initiated them. You can filter/sort the list to see whether a similar RFI exists as the one you want to raise. To get more details about the question and the answer (if available) to an RFI, select the hyperlink in the **RFI no** field.

Working with Requests for an RFI

To initiate the request for information (RFI) process, you can create and submit a request for a new RFI to PCL. The RFI coordinator or project manager for PCL reviews the request. They can either generate an RFI from the request, return the request to you for clarification, or provide you with a response. If the request is used to generate an RFI, the RFI coordinator or project manager collaborates with consultants to address the RFI.

If the request is returned for clarification, PCL provides you with the reason it was returned. Revise and Go to your company's collaboration workspace in PM4+.

Create and Submit a Request for an RFI

1. Select the **New RFI request** tile.

The Create RFI Request dialog opens.

3. In the **Title** field, type a title for the request for an RFI.

4. If you know the documents that may be affected by your question, input their number into the **Document reference** field.

5. Click **OK** to create the new RFI Request.

   The "Create RFI Request" dialog closes and the details view of the new RFI Request opens. RFI Requests are created with a status of "Draft".

6. From the action pane, select **Edit**

7. If your company uses a separate numbering system for tracking RFIs, enter your company number in the **Sub RFI no** field.

8. If you think the schedule may be affected by the RFIQ, set the **Schedule impact** toggle to **Yes**

9. If you think there may be a potential cost impact, set the **Cost impact** toggle to **Yes**

10. In the **Question** field, type the question that needs to be answered.

11. Attach any relevant documents to the **Question**.

12. If you have a possible solution, fill in the **Proposed solution** field.

13. Add any supplementary information as attachments for the **Question** or **Proposed solution**.

14. Click **Submit** in the action pane to send the question to PCL for review.
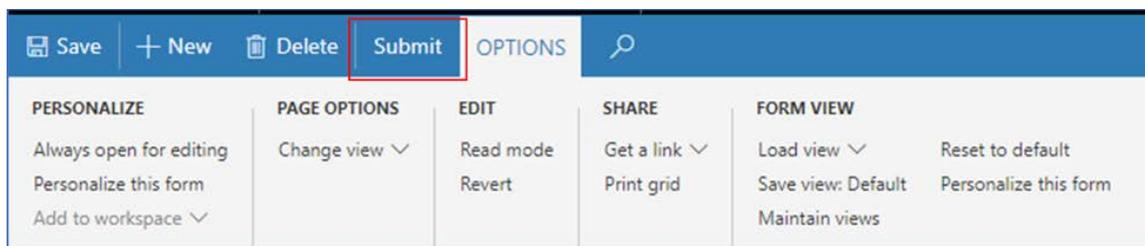
The status of the RFI Request changes from "Draft" to "Submitted".

Submit a request for an RFI requiring changes

1. Go to your company's collaboration workspace in PM4+.

2. From the **My company's RFI request** list, select the RFI request to resubmit. This request should have a status of "Requested change".

3. Update the **Title** field if needed.

4. In the **Question** text field, type or clarify the question that needs to be answered.

5. Attach any relevant documents to the **Question**

6. Ensure that the information in the **Proposed solution** is clear and the attachments are relevant.

7. Click **Submit** in the action pane to resend the RFI Request to PCL for review.
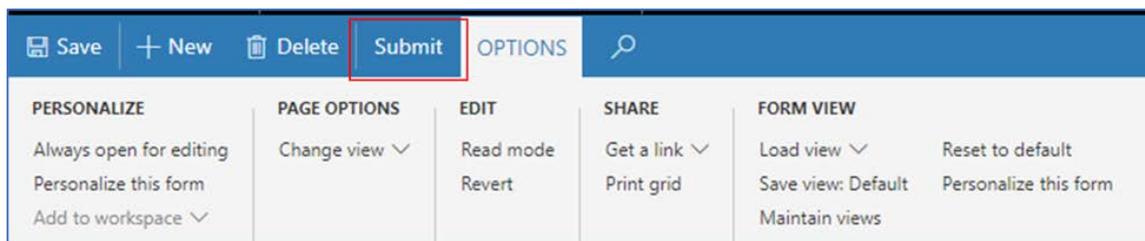
The status changes from "Requested change" to "Submitted".