

RFI Quick Reference Guide

This topic provides a reference for the Project Center **RFI** activity center.

Purpose

The **RFI** activity center enables you to effectively log and track RFIs through their approval process.

Audience

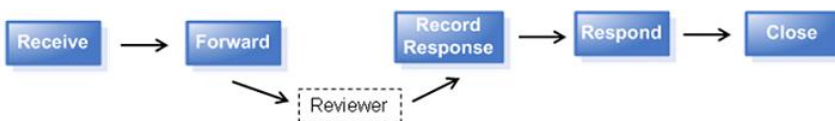
Architects, engineers, construction professionals, and owners.

Key Features

- Streamline RFI management.
- Manage construction-related project information.
- Capture and connect interrelated contract management work processes.

Received RFI Workflow

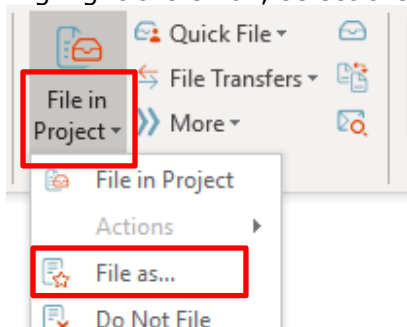
The following workflow options are available for tracking received RFIs in the project. Not all steps have to be used.



To log a received RFI from email

You can log a received RFI directly from an email message.

1. Highlight the email, select the dropdown arrow by **File in Project** and then select **File As**.



2. In the **Select Project dialog box**, double-click on the corresponding project to select it.

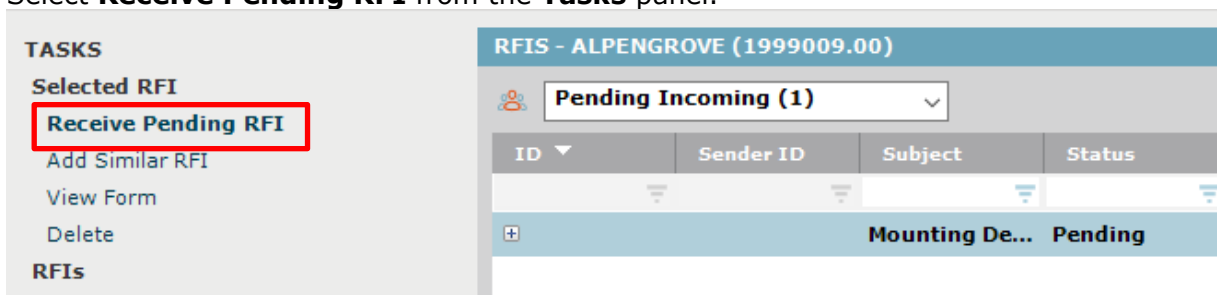
- In the **File As dialog box**, select the **New Item** radio button and **RFI** from the **Project Item Type** list to log a new RFI. Complete the information in the **Log a Received RFI dialog box** as needed and select **OK**.

To log a received RFI from Info Exchange

External users can be given access to your Info Exchange site so they can send you RFIs directly from the site.

See the [Project Team Overview](#) for more information on granting external users access to Info Exchange.

- You will receive an email notification that an RFI was sent to you through Info Exchange. Follow the link in the email to the **RFIs** activity center.
- Select **Receive Pending RFI** from the **Tasks** panel.



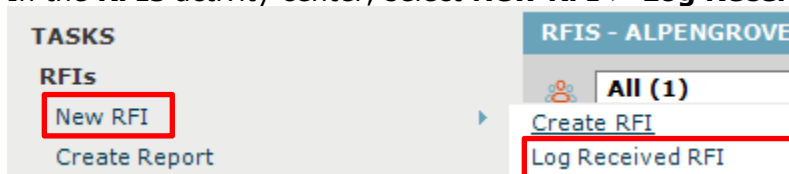
- Complete the information in the **Log a Received RFI** dialog box as needed and select **OK**.

To log a received RFI from the RFI activity center

You can also log a received RFI directly through the activity center. This is how you log documents received in hard copy or messages received via phone or fax.

Download or scan files needed before logging the RFI.


- In the **RFIs** activity center, select **New RFI > Log Received RFI** from the **Tasks** panel.



- Complete the information in the **Log a Received RFI** dialog box as needed.
- Use the **Description of Contents** tab to track physical samples and items.

Question	Description of Contents (1)	Received Files (1)		
Import...	Edit in Spreadsheet...			
<input type="checkbox"/>	Qty	Date	Number	Description
<input type="checkbox"/>	1	July 29, 2011		Alpengrove - A101.pdf

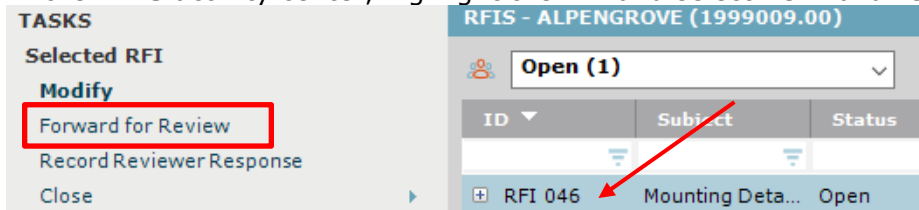
4. You can add scanned files or files downloaded from another site to the **Received Files** tab.

Question	Description of Contents (1)	Received Files (1)	Email Log (0)	Supporting Documents (0)	Rela
Views ▾ Add Files					
Name	Type	Size	Date Modified	Path	
 Alpengrove - A101.pdf	PDF File	1,339 KB	7/29/2011 12:00:00 PM	\\man-s...rawings	

To forward an RFI for review

RFIs can be forwarded for review to multiple internal and external reviewers.

1. In the **RFIs** activity center, highlight the RFI and select **Forward for Review** from the **Tasks** panel.



The screenshot shows the 'RFIS - ALPENGROVE (1999009.00)' activity center. On the left, the 'TASKS' panel is open, and 'Forward for Review' is highlighted with a red box. The main area shows a table with columns 'ID', 'Subject', and 'Status'. The first row is 'RFI 046' with subject 'Mounting Deta...' and status 'Open'. A red arrow points from the 'Forward for Review' task to the 'RFI 046' row.

2. Select any files to send to the reviewers in the **Select Files to Forward for Review dialog box** and select **OK**.

*Internal reviewers will see all associated files when they view the RFI through the **RFI** activity center so forwarding files may not be necessary.*

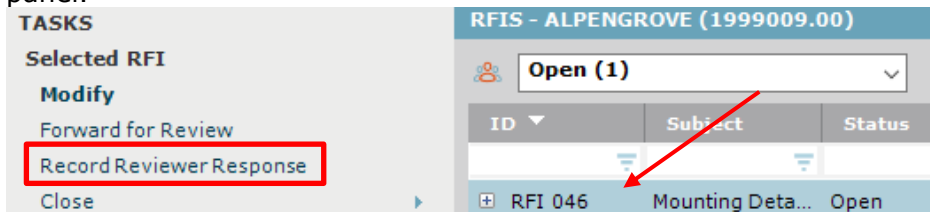
3. Complete the information in the **Forward RFI for Review dialog box** as needed.

If you choose to send via email, Newforma prepares a notification email. Look for the Microsoft Outlook icon flashing in the Windows toolbar indicating the email is ready to send.

To record a reviewer response in the RFI activity center

Reviewers' responses can be recorded in the **RFI** activity center from email or from a response sent through Info Exchange.

1. In the **RFIs** activity center, highlight the RFI and select **Record Reviewer Response** from the **Tasks** panel.



The screenshot shows the 'RFIS - ALPENGROVE (1999009.00)' activity center. On the left, the 'TASKS' panel is open, and 'Record Reviewer Response' is highlighted with a red box. The main area shows a table with columns 'ID', 'Subject', and 'Status'. The first row is 'RFI 046' with subject 'Mounting Deta...' and status 'Open'. A red arrow points from the 'Record Reviewer Response' task to the 'RFI 046' row.

- Record your comments in the **Response** box on the **Response** tab.

Response Description of Contents (1) Associated Files (0)

Summary: **Internal Notes**

Received from: Sarah McKinney (Newforma, Inc. - Services)

Question:

Suggestion:

B I U Verdana 10 A f f. ☰

Response:

- Add any files to the **Associated Files** tab.

Response Description of Contents (1) **Associated Files (1)** Email

Transferred Files View

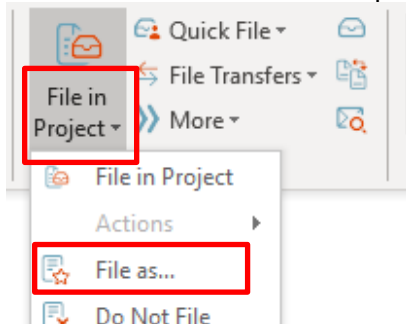
Name	Type	Size	Date Modified
Alpengrove - A201.pdf	PDF File	1,435 KB	7/29/2011 12

- Select **Record Response** to save your changes.

To record a reviewer response from email

When a reviewer responds to an RFI via email, you can record the response directly from Outlook.

- In Outlook, highlight the email you want to log as a reviewer response, then select the drop-down arrow for the **File in Project** button in the **Project Center Add-In for Microsoft Outlook** toolbar. Select **File As** from the drop-down menu.



- In the **Select Project dialog box**, double-click on the corresponding project to select it.
- In the **File As dialog box**, select **Reviewer Response** and select **RFI** as the **Project Item Type** to pick from the list of expected RFIs in the **Choose Project Item dialog box**. Complete the information in the **Record Reviewer Response for RFI dialog box** as needed.

Choose Project Item

Look in: RFI

Select Item

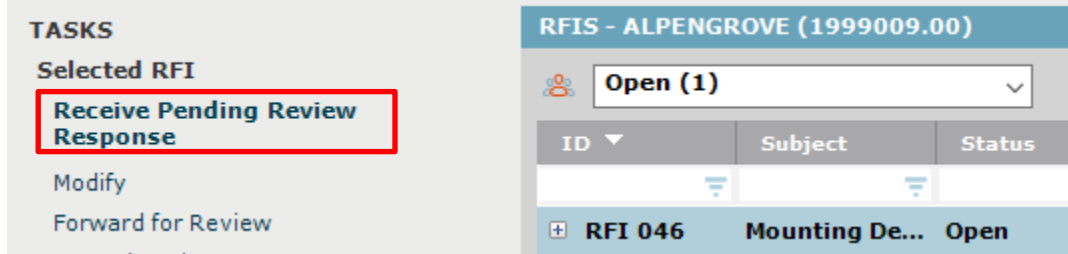
Open (8)

ID	Subject	Status	Discipline
RFI-01005	4-15-19 Tes...	Open - Over...	--
RFI-00999	Test time to sa...	Open	Cost/Estimating
RFI-00411	RFI NIX Workf...	Open - Overdue	--

To record a reviewer response from Info Exchange

Reviewers can respond to an RFI through Info Exchange. You will receive an email notifying you of the sent response.

1. In the **RFIs** activity center, select **Pending Incoming** from the category drop-down list. Highlight the appropriate RFI and select **Receive Pending Review Response** in the **Tasks** panel.



2. Complete the information in the **Record Reviewer Response for RFI dialog box** as needed.

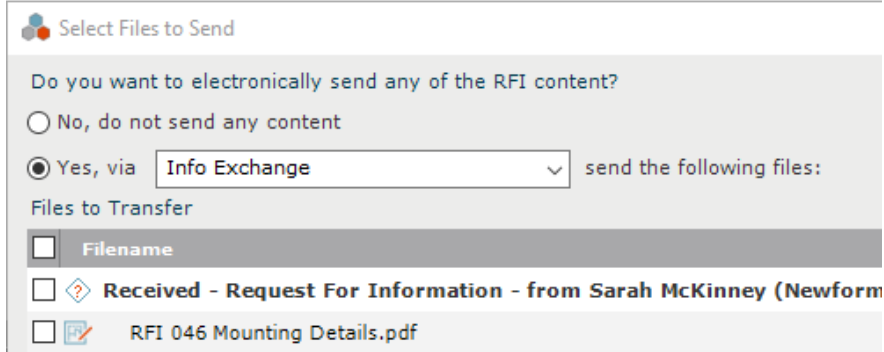
To respond and close

Use this option to track your response to the RFI and close it within Newforma.

1. In the **RFIs** activity center, highlight the RFI and select **Close > Respond and Close** from the **Tasks** panel.



2. In the **Select Files to Send dialog box**, select any files you want to send with the response. Any files included in a reviewer response are selected by default. Select **OK**.



3. Complete the information in the **Respond to RFI and Close dialog box**. You can use the response widget to copy a full summary of the RFI activity or just a summary of the reviewer responses in the **Response field**.

Respond to RFI and Close

To: Bob Welder Transmittal ID: Auto Number
RFI ID: RFI 046

CC:

From: Howard Roark

Subject: Mounting Details

Action: Answered Hide recipient list ⓘ

Date: Thursday, April 9, 2020

Send Via: Info Exchange

Log In Document Control ⓘ

Update RFI

Reasons: Discipline:

Response Description of Contents (1) Associated Files (1) Email Log (0) Related Items (0) Change Log

Summary: Internal Notes

Received from: Sarah McKinney (Newforma, Inc. - Services)
Question:

Response: Review Summary
Full Summary

Keywords:

Print or save form after filing Create Related: Action Item **Create** Cancel Help

4. Click **Create** to close the RFI and create the response.

Initiate RFI Workflow

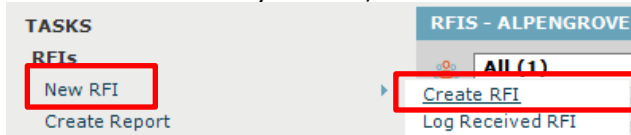
The following workflow options are available for tracking RFIs that you initiate for the project. Not all steps have to be used.



To create an RFI from the RFIs activity center

You can log and track RFIs you create directly through the activity center.

1. In the **RFIs** activity center, select **New RFI > Create RFI**.



2. Enter any information as needed in the **Create RFI dialog box**. Use the **Question** tab for the content of your question and the **Supporting Documents** tab for any files.

The screenshot shows the 'Create RFI' dialog box. The 'Subject' field is set to 'Required'. The 'Due Date' field has 'No Due Date' selected. The 'ID' field is set to 'Auto Number'. The 'Type' is set to 'Construction'. The 'Status' is set to 'Draft'. The 'Question' tab is selected and highlighted with a red box. The 'Supporting Documents (0)' tab is also highlighted with a red box. The dialog box includes a rich text editor with a toolbar and a 'Suggestion:' field at the bottom.

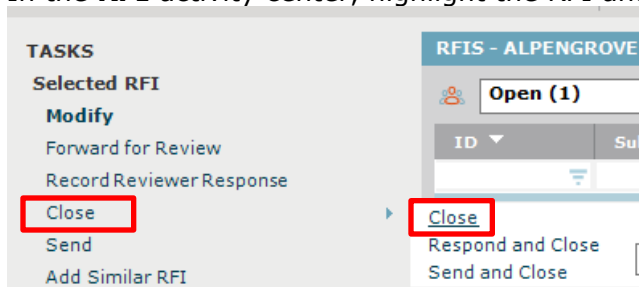
3. Click **OK** to create the RFI.

The new RFI is listed in a Draft state until it is forwarded or closed.

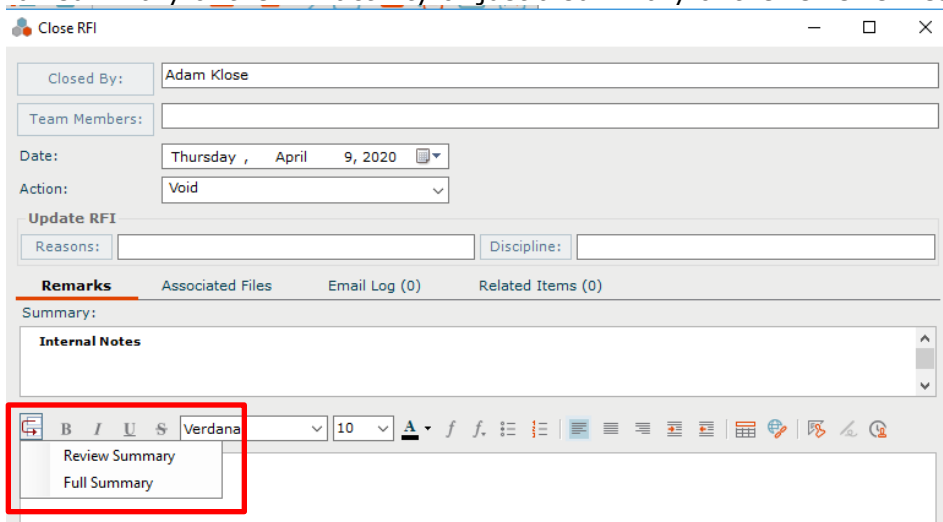
To close an RFI

After sending the RFI for review and recording the reviewer's response as needed, you can log the answer and close the RFI in Newforma.

1. In the **RFI** activity center, highlight the RFI and select **Close > Close** from the **Tasks** panel.



2. Complete the information in the **Close RFI dialog box**. You can use the response widget to copy a full summary of the RFI activity or just a summary of the reviewer responses in the **Response** field.



3. Select **OK** to close the RFI.

To send and close an RFI

Use this option to track your response to the RFI and close it within Newforma.

1. In the **RFIs** activity center, highlight the submittal and select **Close > Respond and Close** from the **Tasks** panel.



2. In the **Select Files to Send dialog box**, select any files you want to send with the response. Any files included in a reviewer response are selected by default. Click **OK**.

Select Files to Send

Do you want to electronically send any of the RFI content?

No, do not send any content

Yes, via

Files to Transfer

<input type="checkbox"/>	Filename
<input type="checkbox"/>	Received - Request For Information - from S...
<input type="checkbox"/>	RFI 046 Mounting Details.pdf

3. Complete the information in the **Respond to RFI and Close dialog box**. You can use the response widget to copy a full summary of the RFI activity or just a summary of the reviewer responses in the **Response** field.

Respond to RFI and Close

To: Transmittal ID:
 RFI ID:

CC:

From:

Subject:

Action: Hide recipient list

Date:

Send Via:

Log In Document Control

Update RFI

Reasons: Discipline:

Response | Description of Contents (1) | Associated Files (1) | Email Log (0) | Related Items (0) | Change Log

Summary: **Internal Notes**

Response:

Keywords:

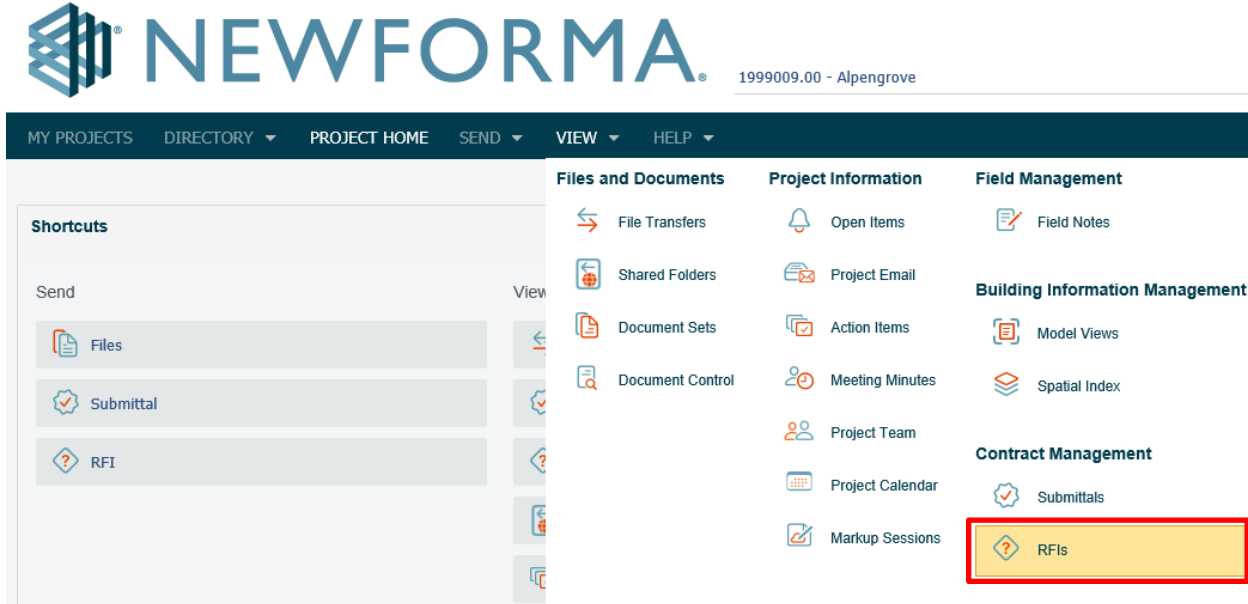
Print or save form after filing Create Related:

4. Click **Create** to close the RFI and create the response.

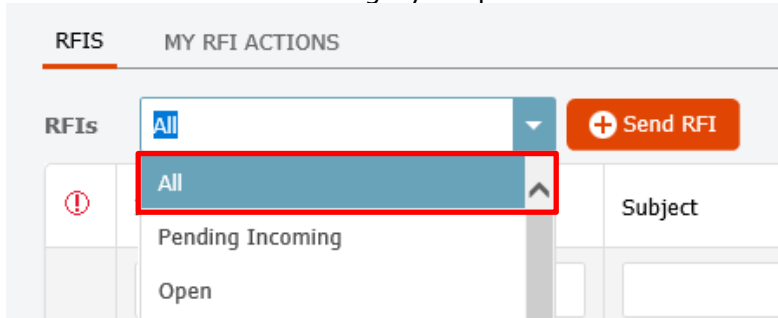
To view RFIs on Info Exchange

Internal and external users can see the **RFIs log** on Info Exchange. By default, external users only see items in the workflow that they sent or received.

1. Log into the Info Exchange website and select the project, then select **View > Contract Management > RFIs**.



2. You can use the **RFIs** category dropdown list to filter the list of RFIs by status.



3. You can view the workflow for any RFI.

RFIS MY RFI ACTIONS											
RFIs All											
ID	Sender ID	Subject	Status	Total Days	Received	Forwarded	Response	Closed	Supporting Documents	Related Items	
RFI-01005	041519	4-15-19 Test for ext	Open - Overdue	361	4/15/2019 Receive From: Eric Buterbaugh (Newforma, Inc.)	8/13/2019 Forward Forward Due back from: Thang Tran (Newforma) and one other	2/19/2019 Approved From: Thang Tran (Newforma) 10/23/2019 Approved From: byztn2@gmail.com (60C) 1/21/2020 Pending From: Marty Takesian (Newforma - Manchester)				
RFI-01004	Test 123	Test 123	Closed	332	5/16/2018 Receive From: Jason Adams (Newforma)			4/12/2019 Respond and Close Closed by: Bob Batchler (Newforma)			
RFI-01003		More Info - Baskervill - 'Outlook addin not loading' - 00122744	Closed	666	5/4/2018 Receive From: sfadmin@newforma.com	5/4/2018 Forward	5/4/2018 Approved From: sfadmin@newforma.com 11/22/2018 Approved From: Eric Buterbaugh (Newforma, Inc.)	2/28/2020 Respond and Close Closed by: Eric Buterbaugh (Newforma, Inc.)	2 files		
RFI-01002		Test for Manu	Closed	1		3/1/2018 Forward	3/1/2018 Approved From: hroark16@jma-dt05.com	3/1/2018 Respond and Close Closed by: Eric Buterbaugh (Newforma, Inc.)	1 file		
RFI-01001		test	Draft	786							
RFI-01000		Test time to save RFI	Closed	869	10/13/2017 Receive From: Sarah Goldstein (Intech Design Group, Inc.)	2/11/2020 Forward	2/11/2020 Approved From: Sarah Goldstein (Intech Design Group, Inc.)	2/28/2020 Respond and Close Closed by: Conan Jurgens (Newforma)			

4. When you need to access the data in different formats you can export to a variety of file formats from the website.

