



## Create a Request for Information (RFI)

The purpose of a Request for Information (RFI) is to collect written confirmation or clarification from the architect or client that is needed to continue work. RFIs are often necessary to confirm details on the project specifications or drawings.

[Creating a New RFI](#)

[Editing an RFI](#)

[Related Resources](#)

### Creating a New RFI

1. Open **Request for Information** from the **Forms** options.
2. Click the **New** button on top of the RFI log.

RFI No.	Subject	Created On	Related	Shared
001	Missing Dimension - Door location Room 101	7/10/23 11:20 AM	0 1	1
002	Fire Extinguisher Box Conflict	7/10/23 1:06 PM	0 1	1

3. Fill in the required and other applicable fields of the RFI form. The required fields are the **RFI No.**, **Subject**, and the **Information Requested by Contractor**.

New Request For Information

Cancel Save & Start Workflow

**DETAILS**

RFI No. Get Next \* Required

Subject Type the Subject \* Required

Related RFI Add Existing Create New

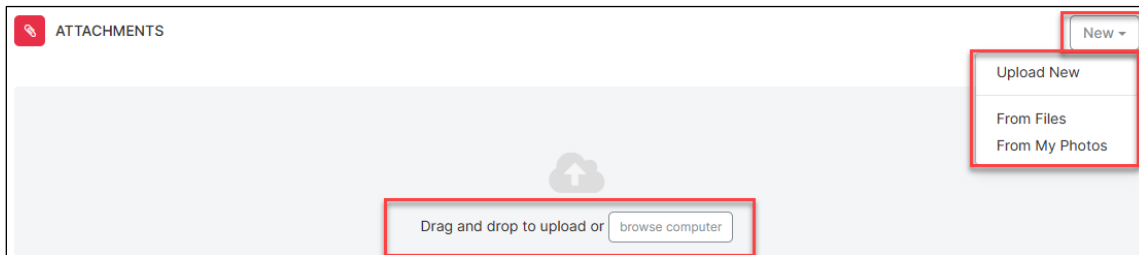
Related Specification Information Type the Related Specification Information

Related Drawing Information Type the Related Drawing Information

Information Requested by Contractor Type the Information Requested by Contractor \* Required

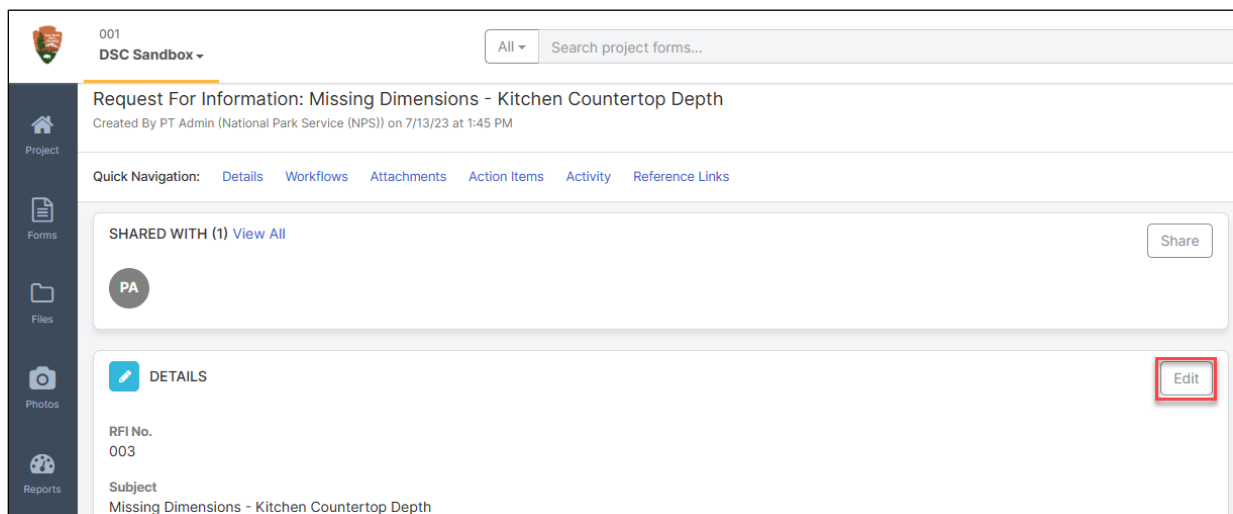
4. Click on **Save & Start Workflow** to save the entered data and select the workflow(s) to start.

**NOTE:** To include supporting documentation, Save the record and upload documents to the **Attachments** section. This can be done before or after sharing or starting the workflow.



### Editing an RFI

1. Open **Request for Information** from the **Forms** options.
2. Select the existing RFI to be edited to open the record.
3. Click the **Edit** button in the Details section.



4. Update the necessary fields.
5. **Save** the changes.

### Related Resources

- Initiating and Completing a Workflow – Construction Contractor
- RFI Review – CMR
- RFI Review – COR
- A/E Response to the RFI Workflow
- Adding Attachments
- Creating Action Items
- Making Comments
- Adding Reference Links

- Running Reports