



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.

Ş	001 DSC Sar	All •	Search project forms	Q		g. × xt.	PT Admin 👻
Project	Requests For Information shared with me				New Print		
Forms		RFI No. *	Subject \$	Created On \Rightarrow	Related	Shared	
c		001	Missing Dimention - Door location Room 101	7/10/23 11:20 AM	% 0 2 ⊄1	1 1	Edit
Files		002	Fire Extinguisher Box Conflict	7/10/23 1:06 PM	% 0 ≭ 1	1 1	Edit

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	r Informatior	1				Cancel Save	& Start Workflow 🔫
	DETAI	LS					
	RFI No.					* Required	
	Get Next						
	Subject			* Required			
	Type the Subject						
	Related RFI		e [#] Add Existing	Create New			
		RFI No.		Subject			
	Related Spec	ification Information					
	Type the R	lelated Specification Information					
	Related Draw	ing Information					
	Type the R	lelated Drawing Information					
	Information R	equested by Contractor				* Required	
	Type the li	nformation Requested by Contractor					

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.

S ATTACHMENTS			New -
		Upload Net	w
		From Files From My Pi	
			_
	Drag and drop to upload or browse computer		

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.

Ş	001 DSC Sandbox - All - Search project forms				
A Project	Request For Information: Missing Dimensions - Kitchen Countertop Depth Created By PT Admin (National Park Service (NPS)) on 7/13/23 at 1:45 PM				
	Quick Navigation: Details Workflows Attachments Action Items Activity Reference Links				
Forms	SHARED WITH (1) View All	Share			
C Files	PA				
Photos	DETAILS	Edit			
8 3a	RFI No. 003				
Reports	Subject Missing Dimensions - Kitchen Countertop Depth				

- 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