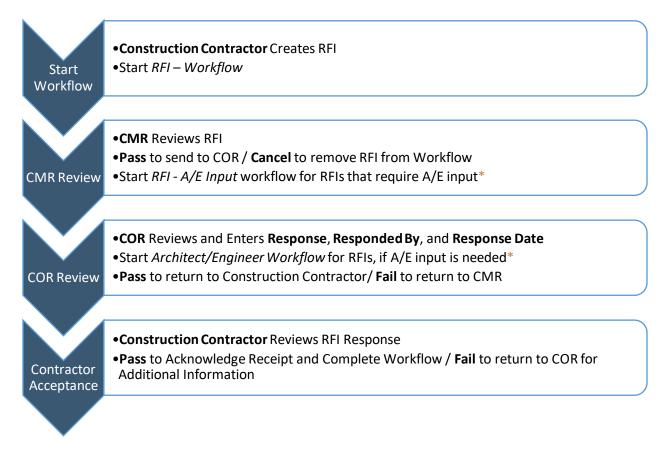




# Initiating and Completing an RFI Workflow – Construction Contractor

The Construction Contractor is responsible for creating an RFI record and starting the workflow. The workflow sends the record through the step-by-step review process in which users are assigned responsibility to *take action* on their step. The last step of the workflow is for the Construction Contractor to Acknowledge Receipt of the RFI Response.

This guide provides instructions for starting the RFI workflow and responding when assigned a step.



Starting the RFI - Workflow Review and Complete Workflow Restarting a Workflow View Workflow Reports Related Resources

## Starting the RFI - Workflow

Only the Construction Contractor has access to start the RFI – Workflow. When the workflow is started, it will be assigned to the CMR for review. The CMR will receive a notification via email.

- 1. There are several ways to get to the *Start new workflow* modal window:
  - New Record
    - a. From the log view of a form type, click the **New** button to create a new record. (*See the Create an RFI QRG for help with a new RFI*.)
    - b. Fill in the required fields of the document and upload supporting documents to the Attachments section.
    - c. Click Save & Start Workflow.

Ş	001 DSC Sandbox +	All  Search project forms	Q	l v v v PT Admin v
Project	New Request For Information			Cancel Save & Start Workflow -
Forms	DETAILS RFI No.			
Files	Get Next 003 Subject Missing Dimensions - Kitchen	Countertop Depth		

- Existing Record
  - a. From the log view of a form type, open the record.
  - b. Click Start New from the Workflows section.

WORKFLOWS	Start New

- Multiple Records from the Log View
  - a. Select one or more of the Workflows that appear in the *Start new workflow* window.
  - b. Click **Start Workflow** to send the workflow(s) to the user(s) in the first step.

Ş	001 DSC Sandbox -	All • Search project forms	Q		8× %*	PT Admin +
Project	Requests For Information shared with	ne			New	Print
Forms	RFI No. 0	Subject 0	Created On ¥	Related	Shared	_
6	003	Missing Dimensions - Kitchen Countertop Depth	7/13/23 1:45 PM	%0 ≭0	1.	Edit
Files	002	Fire Extinguisher Box Conflict	7/10/23 1:06 PM	%0 x41	1 ا	Edit
Protos	001	Missing Dimention - Door location Room 101	7/10/23 11:20 AM	%0 ≭1	<b>±</b> 1	Edit
					Start V	Vorkflow
	2 items selected				Share	Bulk Edit 🗕

2. In the *Start new workflow* window, check the box beside *RFI* - *Workflow*.

#### 3. Click Start Workflow.

		Start new workflow	×
Sear	ch	٩	
	Workflow Name & Description	Workflow Steps	
٥	RFI - Workflow Start for RFI response.	CMR Review $\rightarrow$ COR Review $\rightarrow$ Release to Construction Contractor	
Cano	cel	Start Workfl	ow

#### **Review and Complete the Workflow**

The final step of the workflow is for the Construction Contractor to acknowledge receipt. When the NPS COR passes the workflow the Construction Contractor will receive notification with instructions to review comments and Pass the workflow.

- 4. Access the record from the link in the emailed notification or by opening ProjectTeam and navigating to the record.
- 5. Scroll to the bottom of the *Details* and review the **COR Response**.

Photos	Date Submitted 7/10/23
	Requested Response Duration (in calendar days)
Reports	Requested Response Date 7/17/23
8	COR Response Move cabinet to NW side.
Directory	Responded By Loretta Maine
Calendar	Response Date 11/15/23

6. Open the *Workflow* to review **Notes**.

* W	ORKFLOWS			Start Ne
	<b>/E Input</b> is Done			Restart
	<b>Vorkflow</b> is in Prog	gress (Step 3 of 3)		
	<b>Started</b> 11/15/23	CMR REVIEW Passed 11/15/28 ✓ STEP 1	COR REVIEW RELEASE TO CO Passed 11/h5/23 → Pending NA ✓ STEP 2 → STEP 3	J
s Step #	Step Label			Due Da
	Action	Name	Date Completed	Notes
y .	► Started	PT Admin National Park Service (NPS)	7/10/23	
Step #	Step Label CMR Review			Due D: 7/12/2
	Action	Name	Date Completed	Notes
	Ø Cancelled	CMR PM NPS CMR	8/8/23	CC to provide sketch of recommendation to ensure proper location can be determined.
Step #	Step Label			Due Da
nov projectteem com	/#/project/9043/home			

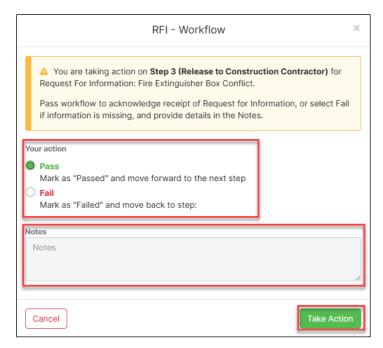
7. View Attachments for Markups or documents added by others.

_		
Name	Last Updated	
Fire ext.docx M 12 KB	Robert Representative (NPS CMR) 8/15/23 at 11:16 AM	

8. Click on the green **Take Action** button from the top or in the *Workflows* section.

🚰 Pro	jectTeam DSC Sandbox -	All - Search project forms		٩	¥.*	×1×	O Contributor Access Learn More ☑	Conrad Contractor 👻	•
Project	RFI - Workflow requires your action Step #: 3 of 3 (Release to Construction Contractor) Due Date: 11/20/23 Step Instructions: Pass workflow to acknowledge rec Take Action View Workflow	eipt of Request for Information, or select Fall if ini	formation is missing, and provide details in the Notes.					×	8
Files	← Requests For Information Request For Information: Fire Extinguisher Bt Created By John Bunch (National Park Service (NPS)) on 7/10/23 at							Print -	-
Photos	Quick Navigation: Details Workflows Attachments /	Action Items Activity Reference Links							

- 9. Choose **Pass** to acknowledge receipt of the RFI.
- 10. Choose Fail to return the workflow to the COR for additional information.
- 11. Enter Notes.
- 12. Click the green **Take Action** on the bottom of window.



13. You will still have access to the record and will be able to see where the record is in the Workflow process.

#### **Restarting a Workflow**

Once a workflow is **Complete** or **Cancelled**, it can be restarted.

1. With the record open, click the green **Restart** button from the right side of the cancelled workflow in the *Workflows* section.

WORKFLOWS	Start New
RFI - A/E Input is Done	>
RFI - Workflow is Done	Restart

2. Select **Yes** from the *Restart workflow*? window.

Restart workflow?
Are you sure you want to restart the <b>RFI</b> - <b>Workflow</b> workflow? The old workflow activity will remain but all users in the workflow will be required to take new action.
No, nevermind Yes

#### View Workflow

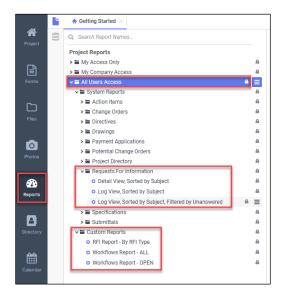
Once a user has been assigned a step in the workflow, the record is then shared with them. They can see where the record is in the workflow by clicking the down arrow on the right side of the workflow name in the *Workflows* section.

From the **Log View**, you can see the Workflow Progress of the record by clicking on the Related Workflow icon in the record row. You can even *Take Action* on the workflow step from here if it is currently in your court.

RFI No. ≑	Subject ¢	RFI Type ‡	Contractor's Suggested Resolution	Potential Contract Cost Impact Description \$	Potential Contract	Potential Contract Scope Impact	Created Or	1 ¥	Related	Shared	ł
007	Lobby Paint Color	Clarification			No	No	8/23/23 9:3	2 AM	⊗0 x⊄0	1	(
006	Fluffy Dirt	Unforeseen Condition	Use flowfill material in lieu of existing soils.		No	Yes	8/19/23 1:2	6 PM	<b>%0 ⊅⊄</b> 1	<b>1</b> 5	(
005	Missing Dimensions - Window Height	Clarification			No	No	8/17/23 12:1	7 PM	%)0 <b>x⊄</b> 1	<b>1</b> 6	(
004	Refrigerator Brand	Unforeseen Condition		Lazy tax	Yes	No	8/15/23 2:5	4 PM	%)0 <b>x⊄</b> 1	<b>1</b> 4	
003	Trash Deposit at Footer A6	Unforeseen Condition	Excavate trash and backfill.	Cost to excavate and remove trash	Yes	Yes	7/25/23 1:2	7 PM	<b>%1 ≭</b> 0	<b>£</b> 6	(
002	Fire Extinguisher Box Conflict	Unforeseen Condition	Move Fire Extinguisher Box 5' towards Room 112	If extinguisher cabinet is not moved, may require HVAC and plumbing work.	No	No	7/10/23 1:0	6 PM Workflows	<b>% ∞</b> 1	<b>1</b> 6	[
001	Missing Dimention - Door location Room 101	Clarification	2' from face of wall to center of door.		No	No	7/10/23 11:	RFI - Work		55	

## Reports

RFI and Workflow Reports can be run from under **All Users Access** in *Reports*. The report will include only records that have been shared with you.



# **Related Resources**

- 3. Help Center Links
  - <u>Start a workflow on a document (projectteam.com)</u>
- 4. QRG and Training Videos
  - Creating an RFI
  - 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