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.

Start Workflow
- **Construction Contractor** Creates RFI
- Start *RFI – Workflow*

CMR Review
- **CMR** Reviews RFI
- **Pass** to send to COR / **Cancel** to remove RFI from Workflow
- Start *RFI - A/E Input* workflow for RFIs that require A/E input*

COR Review
- **COR** Reviews and Enters **Response**, **Responded By**, and **Response Date**
- Start *Architect/Engineer Workflow* for RFIs, if A/E input is needed*
- **Pass** to return to Construction Contractor/ **Fail** to return to CMR

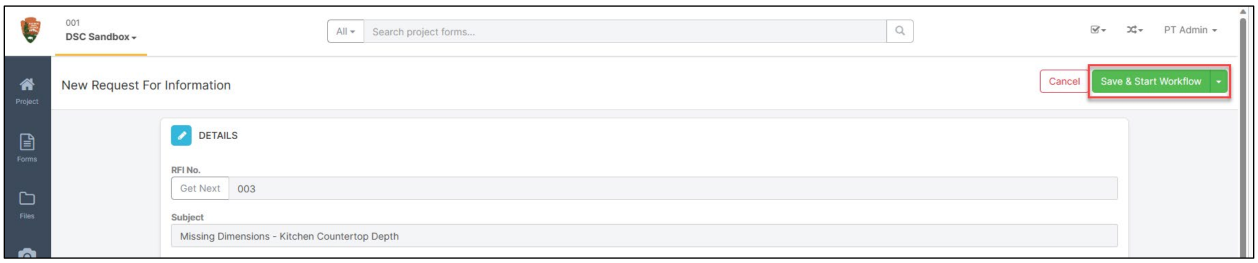
Contractor Acceptance
- **Construction Contractor** Reviews RFI Response
- **Pass** to Acknowledge Receipt and Complete Workflow / **Fail** to return to COR for Additional Information

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.

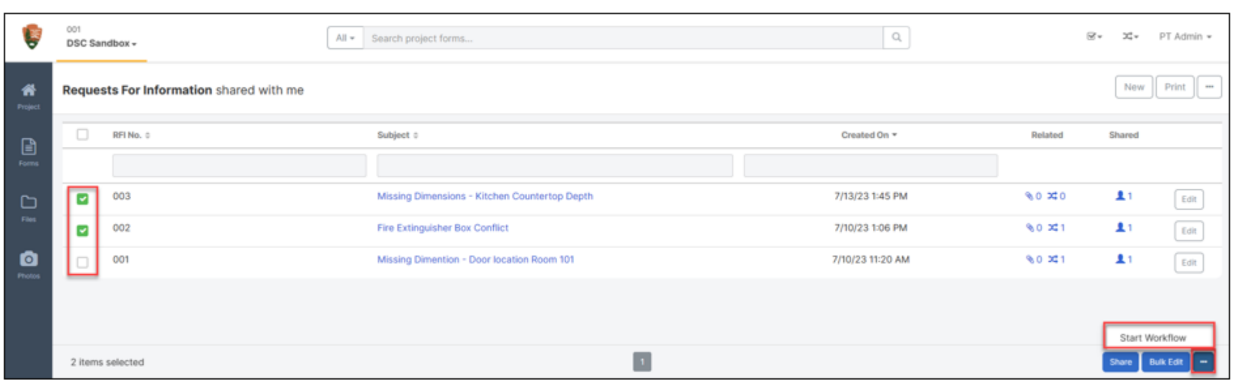
1. There are several ways to get to the *Start new workflow* modal window:

   - *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**.



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

   - *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.



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

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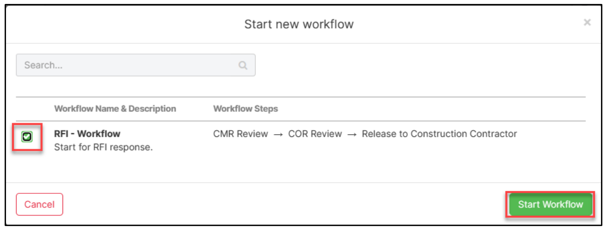
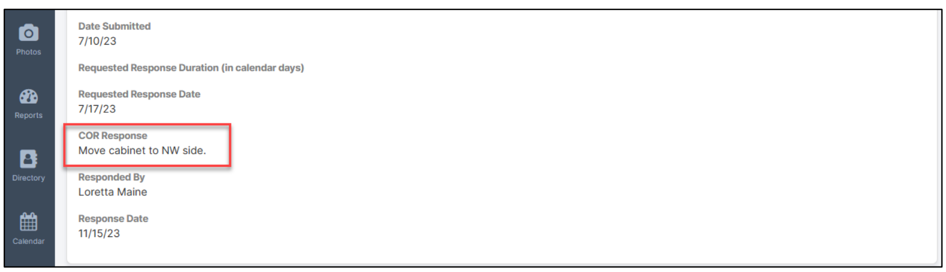
3. Click **Start Workflow**.



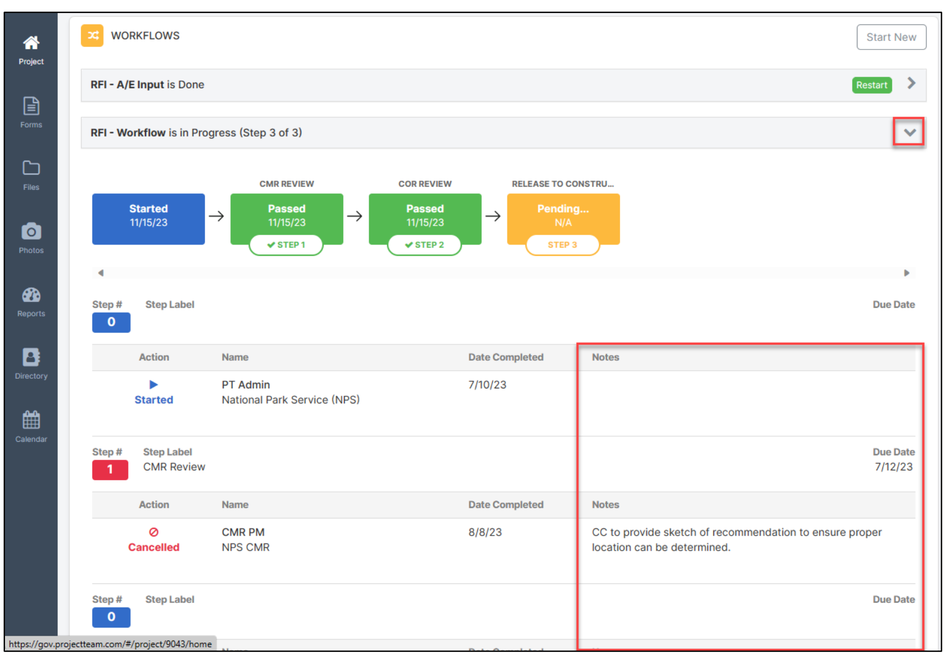
Review and Complete the Workflow

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**.



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



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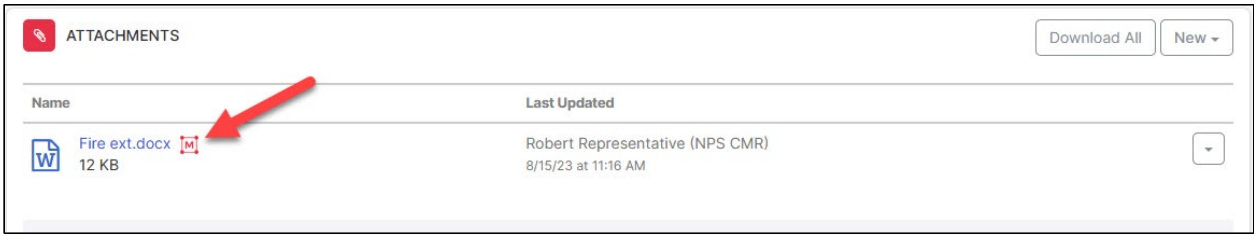
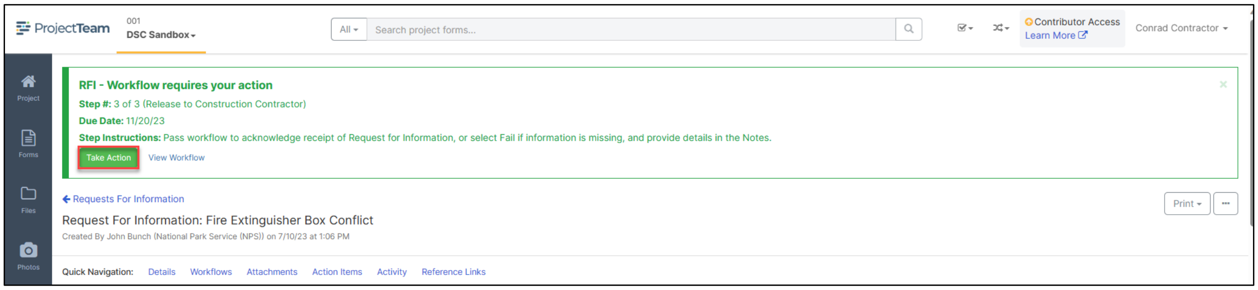
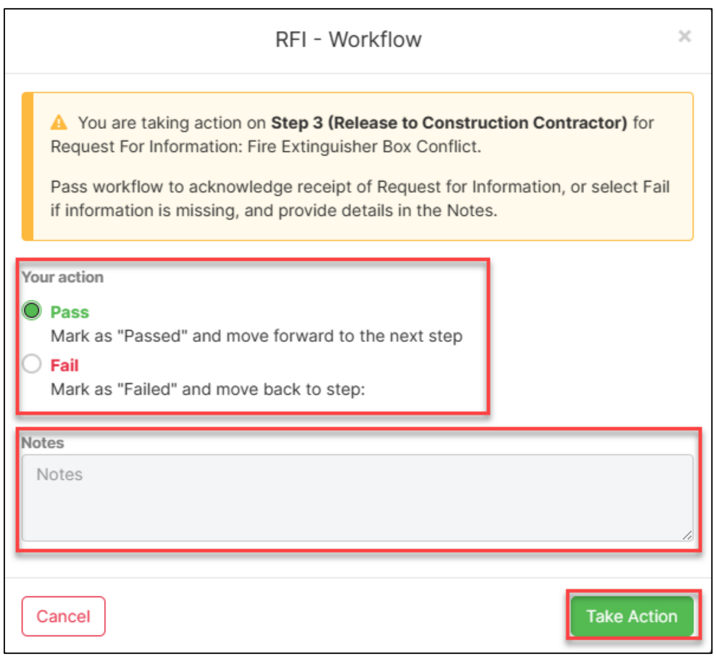
7. View *Attachments* for Markups or documents added by others.



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



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.



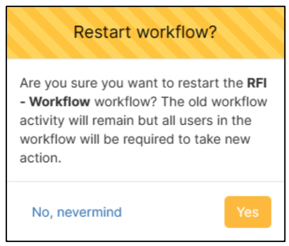
13. You will still have access to the record and will be able to see where the record is in the Workflow process.

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.

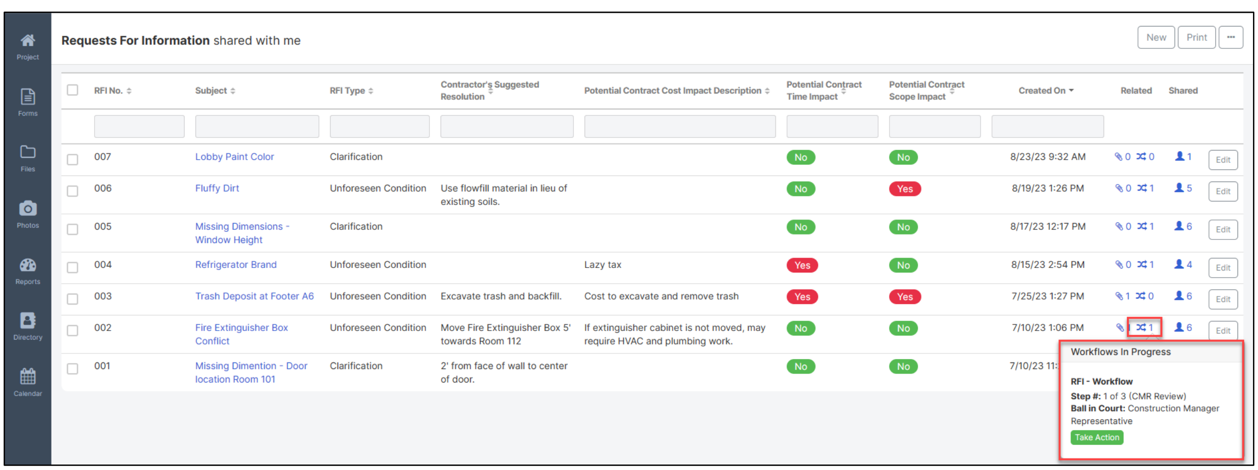
2. Select **Yes** from the *Restart workflow?* window.



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.



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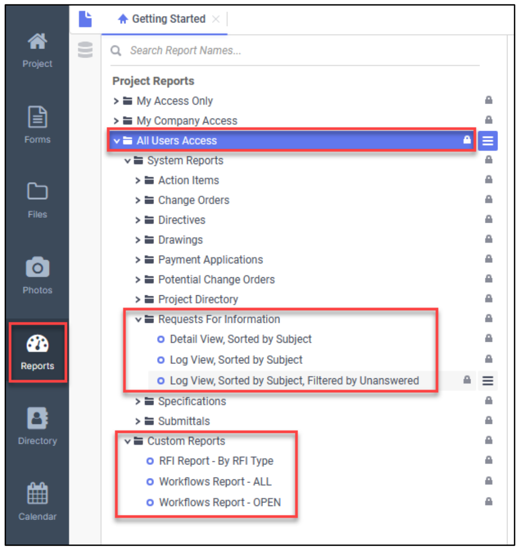
Reports
RFI and Workflow Reports can be run from under **All Users Access** in *Reports*. The report will include only records that have been shared with you.



Related Resources
3. Help Center Links
    - [Start a workflow on a document (projectteam.com)]()

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

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