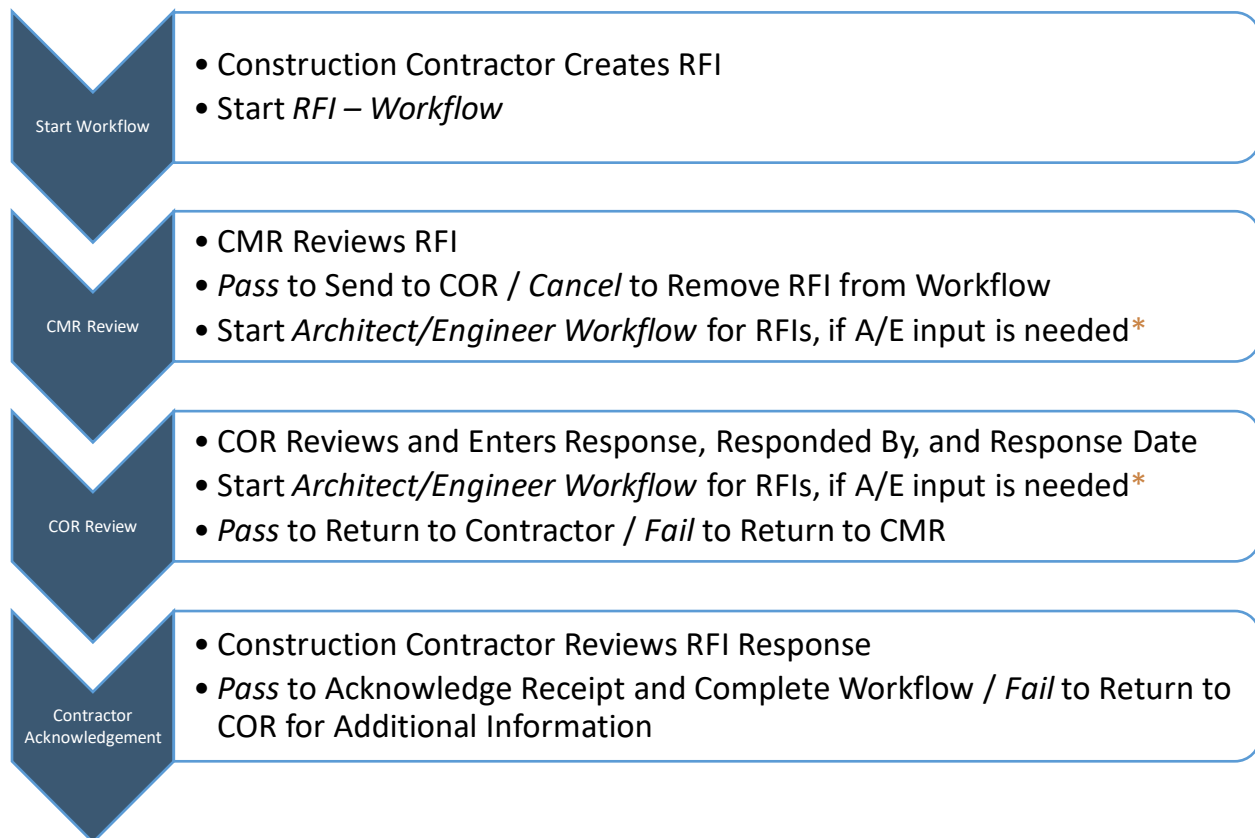# RFI Review - CMR

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 CMR is assigned the first step to review the RFI.

There is an additional *RFI – A/E Input* workflow that can be started by the CMR, if needed.

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 *Architect/Engineer Workflow* for RFIs, if A/E input is needed*

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 Contractor / *Fail* to Return to CMR

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

CMR REVIEW

When the Construction Contractor starts the *RFI – Workflow,* the CMR will receive an email notification and instructions for completing the first workflow step.

1. Access the record from the link in the emailed notification or by opening ProjectTeam and navigating to the record.
2. Review the record and supporting Attachments.
3. **Edit** and/or make necessary **Comments**.

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

5. Choose **Pass** to assign the workflow to the COR.
6. Choose **Cancel** to stop the workflow. It can be restarted by the Construction Contractor.
7. Enter **Notes**.
8. Click the green **Take Action** on the bottom of window.

9. Start the A/E Input Workflow, if Architect/Engineer input is necessary.

A/E INPUT WORKFLOW

The CMR, NPS PM and COR have access to start the RFI – A/E Input workflow but the process is for CMR to start the workflow. When the workflow is started, it will be assigned to the Architect/Engineer for review. The Architect/Engineer will receive a notification via email.

Start Workflow
- **CMR** or **COR** Start *Architect/Engineer Workflow* to Send to A/E for Input.

A/E Input
- **Architect/Engineer** Reviews and Enters input to **COR Response** field and uploads Supporting Files.
- **Pass** to send to COR
- **Cancel** to remove RFI from Workflow

Proceed with Review
- **COR** Validates A/E input
- **Pass** to complete and proceed with Step 2 of the *RFI - Workflow*
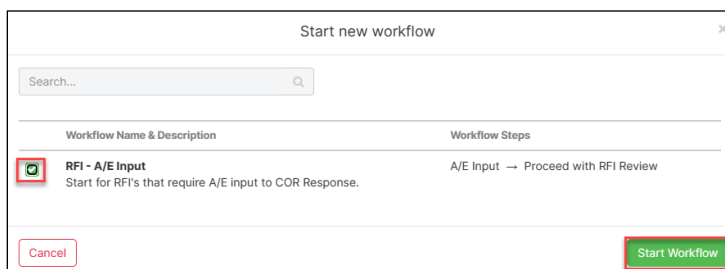- **Fail** to return to A/E

Starting the RFI - A/E Input Workflow

1. Click **Start New** from the *Workflows* section.

2. In the *Start new workflow* window, check the box beside *RFI – A/E Input*.
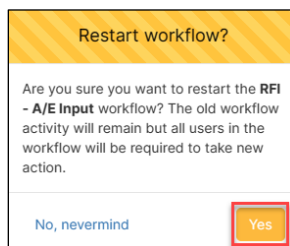3. Click **Start Workflow**.

Restarting a Workflow

Once a workflow is **Complete** or **Cancelled**, it can be restarted. The CMR has access to restart the *RFI – A/E Input* workflow.

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.

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.
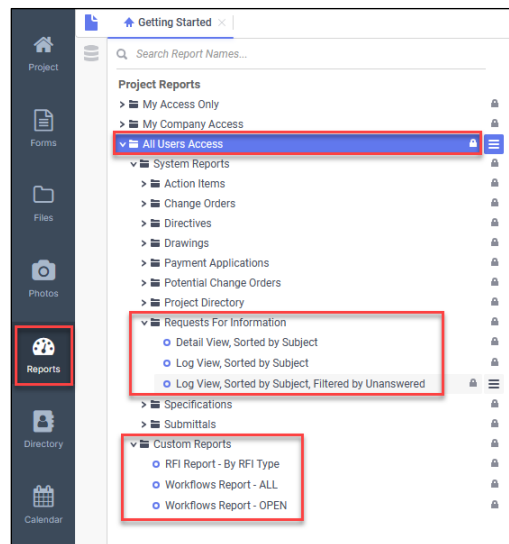
Related Resources

1. Help Center Links

      o [Start a workflow on a document (projectteam.com)](projectteam.com)

3. **QRG**
   - o Create an RFI
   - o Initiating and Completing a Workflow – Construction Contractor
   - o RFI Review – COR
   - o A/E Response to the RFI Workflow
   - o Adding Attachments
   - o Creating Action Items
   - o Making Comments
   - o Adding Reference Links
   - o Running Reports

4. **Training Videos**
   - o Basic Navigation
   - o Adding Attachments
   - o Making Comments
   - o Running Reports
   - o Creating an RFI
   - o Responding to an RFI
   - o Initiating and Completing a Workflow