

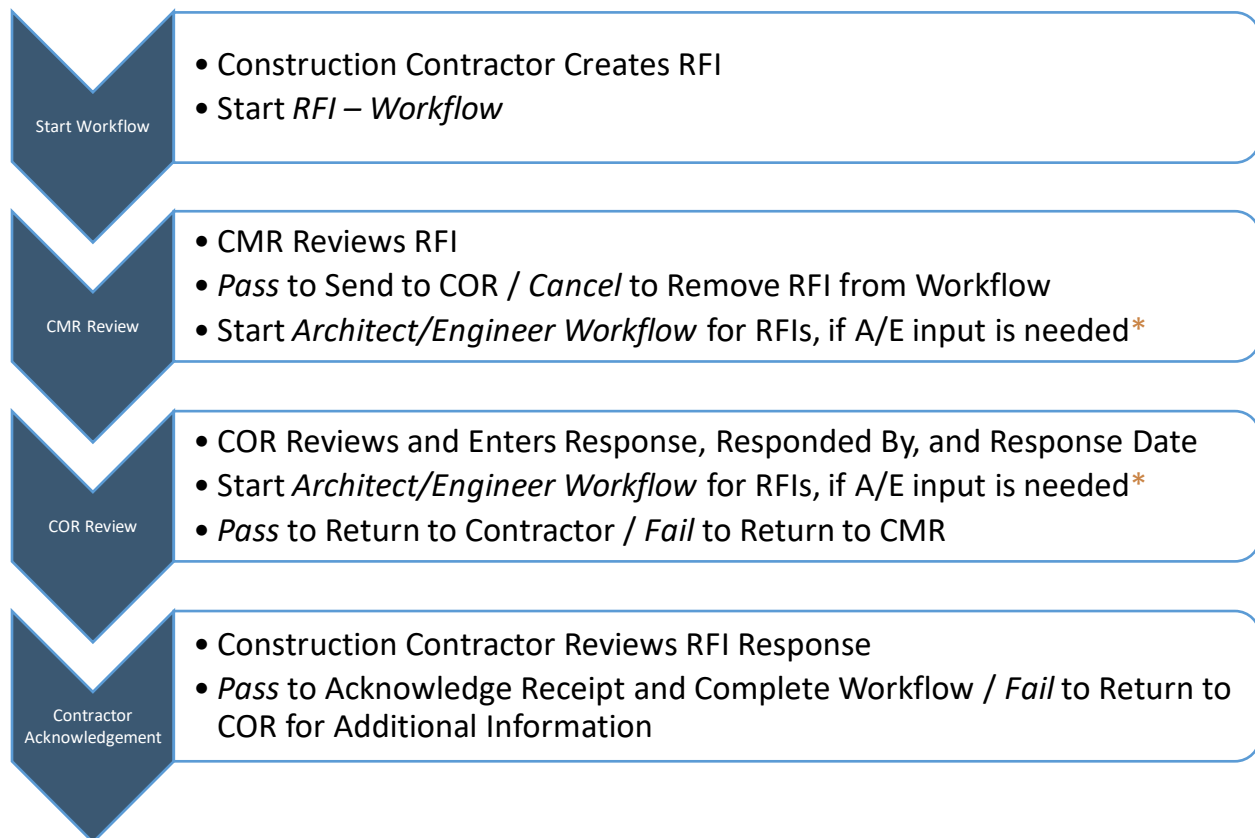


RFI Review - CMR

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.



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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**.

The screenshot shows the ProjectTeam interface for a Request For Information (RFI) titled "Request For Information: Fire Extinguisher Box Conflict". The top section displays a green banner with the text "RFI - Workflow requires your action" and "Step #: 1 of 3 (CMR Review)". Below this, there are instructions for the user to review the RFI and attachments, and a "Take Action" button. The main content area shows the RFI details, including the RFI No. (002) and the subject (Fire Extinguisher Box Conflict). The "DETAILS" section is highlighted with a red box, and the "Edit" button is also highlighted with a red box. The "ACTIVITY" section is visible on the right, with a text box for adding users to be notified, which is also highlighted with a red box.

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

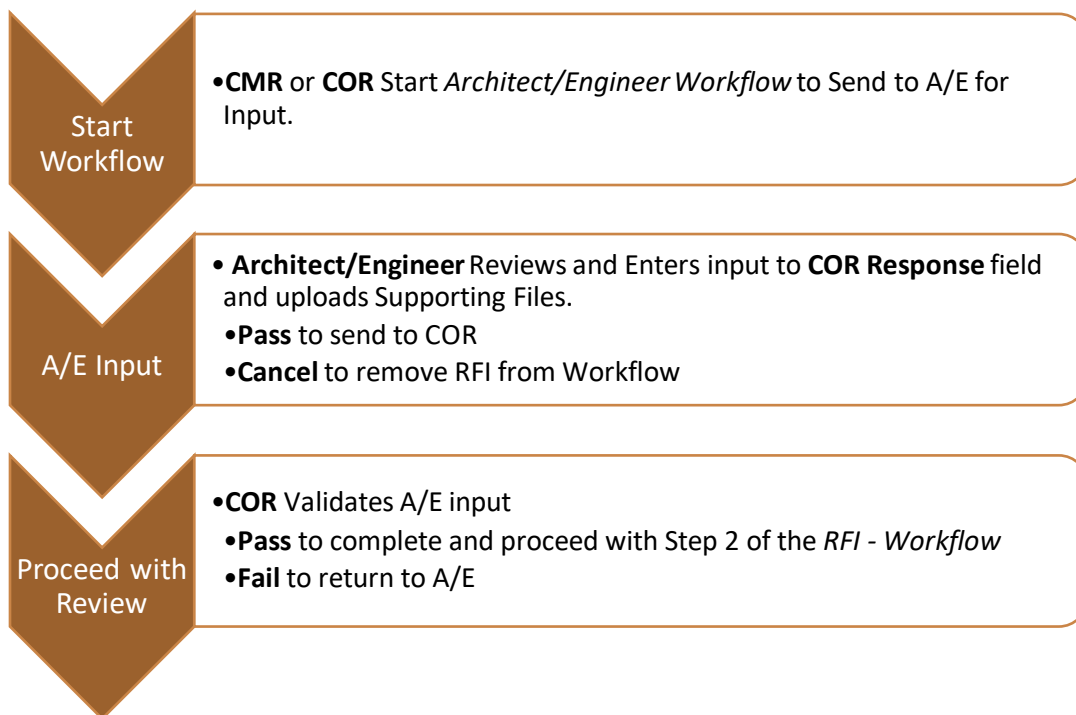
This screenshot is identical to the one above, but the "Take Action" button in the green banner at the top is highlighted with a red box.

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.

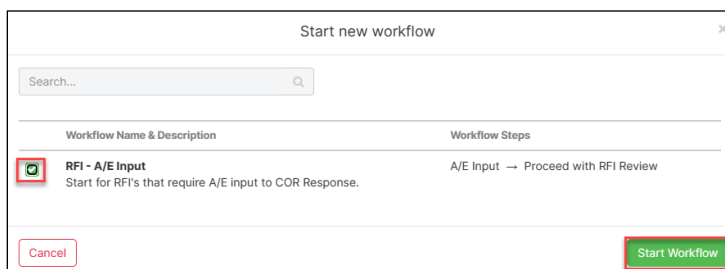


Starting the RFI - A/E Input Workflow

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**.



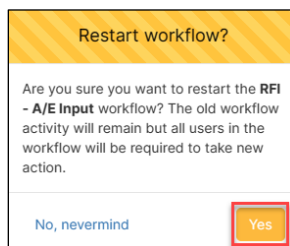
Restarting a Workflow

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.

Requests For Information shared with me

| RFI No. | Subject | RFI Type | Contractor's Suggested Resolution | Potential Contract Cost Impact Description | Potential Contract Time Impact | Potential Contract Scope Impact | Created On | Related | Shared |
|---------|--|----------------------|--|---|--------------------------------|---------------------------------|------------------|---------|--------|
| 007 | Lobby Paint Color | Clarification | | | No | No | 8/23/23 9:32 AM | 0 0 0 | 1 |
| 006 | Fluffy Dirt | Unforeseen Condition | Use flowfill material in lieu of existing soils. | | No | Yes | 8/19/23 1:26 PM | 0 0 1 | 5 |
| 005 | Missing Dimensions - Window Height | Clarification | | | No | No | 8/17/23 12:17 PM | 0 0 1 | 6 |
| 004 | Refrigerator Brand | Unforeseen Condition | | Lazy tax | Yes | No | 8/15/23 2:54 PM | 0 0 1 | 4 |
| 003 | Trash Deposit at Footer A6 | Unforeseen Condition | Excavate trash and backfill. | Cost to excavate and remove trash | Yes | Yes | 7/25/23 1:27 PM | 1 0 0 | 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 1:06 PM | 0 0 1 | 6 |
| 001 | Missing Dimension - Door location Room 101 | Clarification | 2' from face of wall to center of door. | | No | No | 7/10/23 11:00 AM | 0 0 1 | 6 |

Workflows In Progress

RFI - Workflow

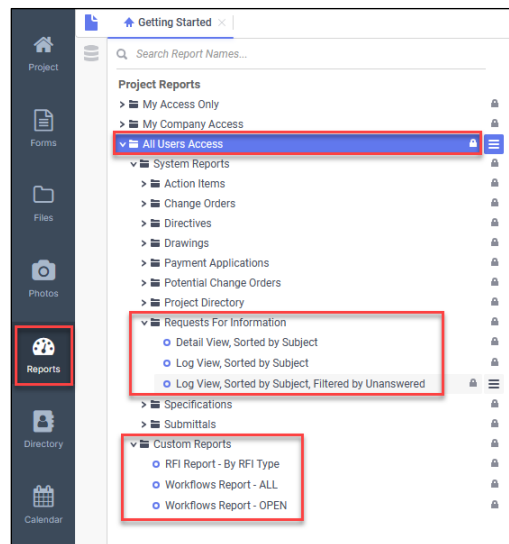
Step #: 1 of 3 (CMR Review)

Ball in Court: Construction Manager Representative

[Take Action](#)

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

- [Start a workflow on a document \(projectteam.com\)](https://projectteam.com)

3. QRG

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

4. Training Videos

- Basic Navigation
- Adding Attachments
- Making Comments
- Running Reports
- Creating an RFI
- Responding to an RFI
- Initiating and Completing a Workflow