Responding to an RFI Workflow - COR

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.

Note: For projects with non-standard RFI durations, the Workflow Step durations can be customized accordingly. Send a request to support@projectteam.com.

This guide provides instructions for responding when the COR Review is assigned.

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*

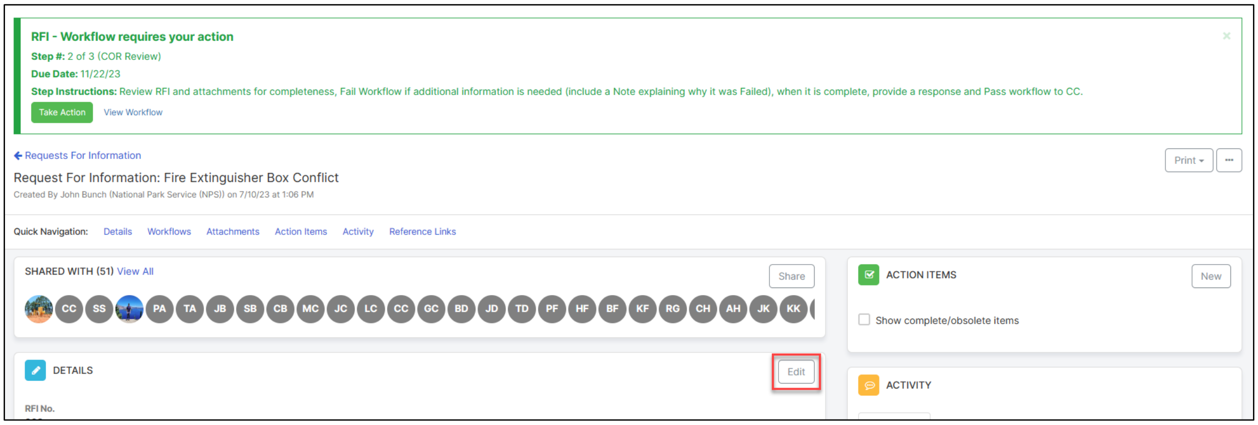
COR Review
- COR Reviews and Enters Response, Responded By, and Response Date
- Start *Architect/Engineer Workflow* for RFIs, if A/E input is needed*
- *Pass* to Return to Contractor / *Fail* to Return to CMR

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

COR REVIEW AND RESPONSE

When the CMR passes their workflow step, the COR will receive an email notification with instructions for reviewing and responding to the RFI.

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. Open the Workflow to review Notes.
4. Click **Edit** in the record's Details section.



5. Scroll to the bottom of the edit window and fill in the COR Response, Responded By, and Response Date fields.
6. Enter Yes, No, or Unknown in The Potential Error & Omission and Request for Equitable Adjustment fields. **Note:** These fields are only visible to NPS users.

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

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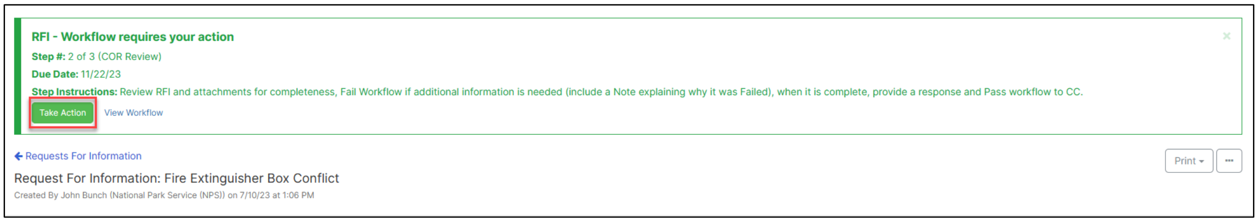
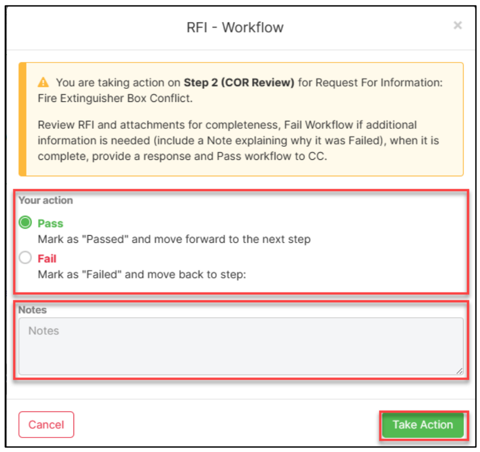
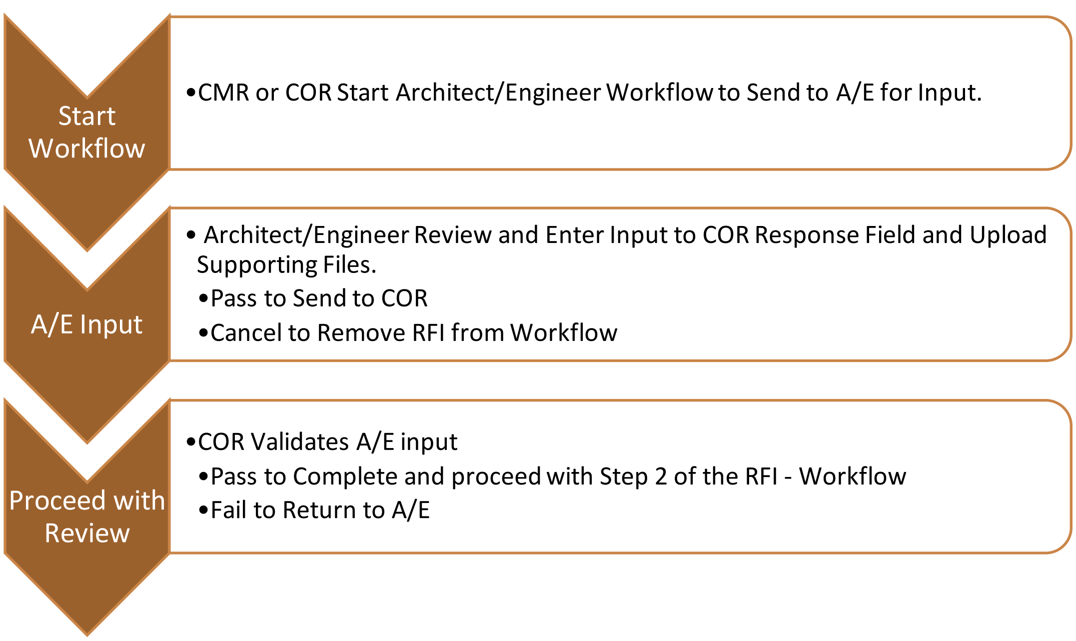


9. Choose **Pass** to return the workflow to the Construction Contractor.
10. Choose **Fail** to return the workflow to the CMR.
11. Enter **Notes**.
12. Click the green **Take Action** on the bottom of window.



13. While the Workflow instructions for starting the *RFI – A/E Input* workflow are included for the CMR workflow step, the COR also has access to start and restart the workflow, if needed.

A/E INPUT WORKFLOW



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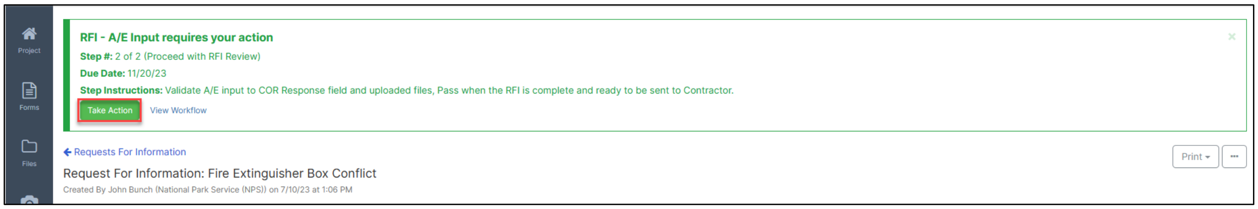
COR Validate and Complete Workflow

Once the A/E passes their workflow step, the COR will receive an email notification with instructions for validating the A/E's response.

1. Access the record from the link in the emailed notification or by opening ProjectTeam and navigating to the record.
2. Validate the A/E Input in the COR Response field of the record's Details and any supporting Attachments.
3. Click on the green **Take Action** button from the top or in the *Workflows* section.



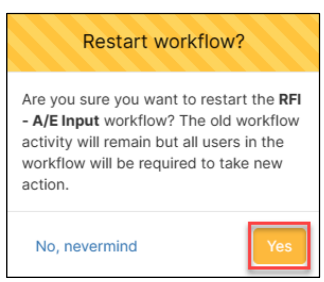
4. Choose **Pass** to Complete the Workflow.
5. **Fail** will to return the workflow to the A/E.
6. Enter **Notes**.
7. Click the green **Take Action** on the bottom of window.

Restarting a Workflow

Once a workflow is **Complete** or **Cancelled**, it can be restarted. The COR has access to start 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.



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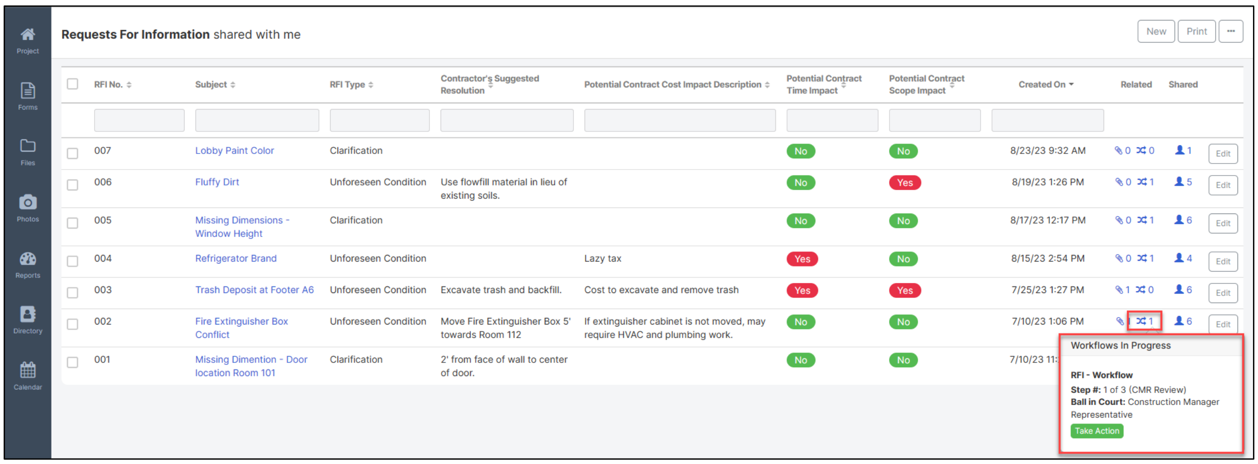
View Workflow

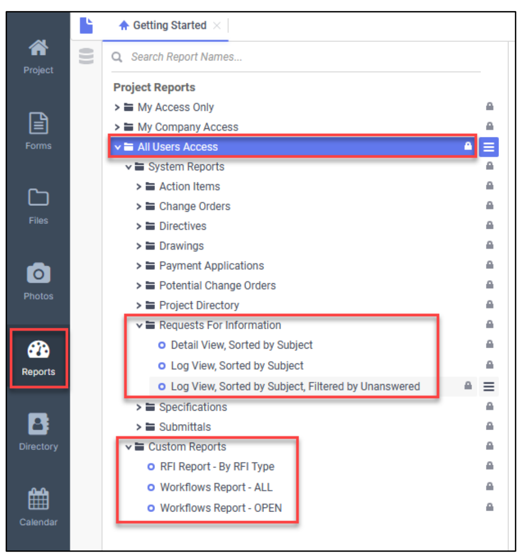
Once a user has been assigned a step in the workflow, the record is then shared with them. They can see where the record is in the workflow by clicking the down arrow on the right side of the workflow name in the *Workflows* section.

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
    - Start a workflow on a document (projectteam.com)

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

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

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