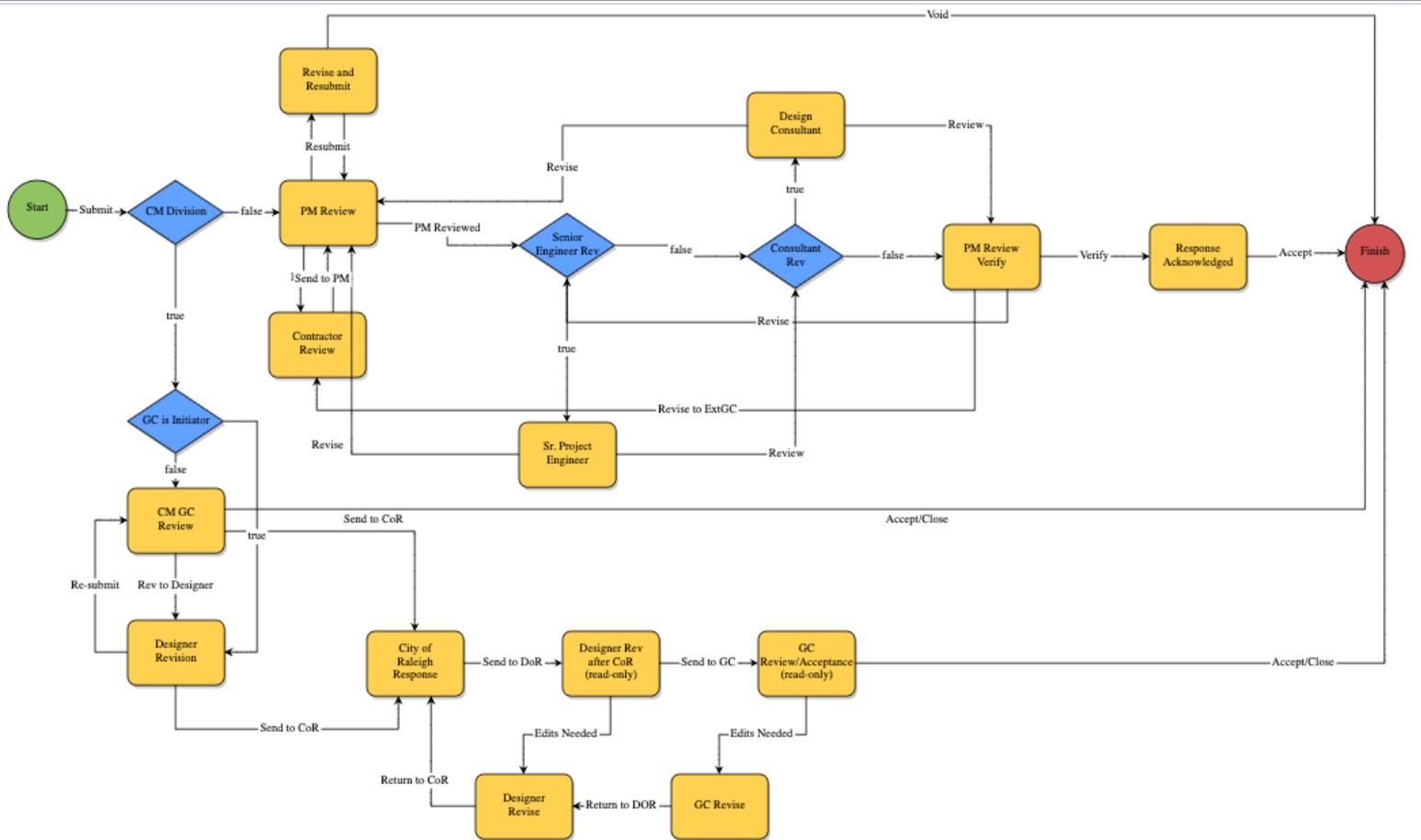




RFI – Request for Information





1. Navigate to your project, then select 'Processes' from the left side menu. Then click 'Start process' in the upper right.

The screenshot displays the Raleigh TEST application interface. On the left is a 'Project Menu' with options: Details, Planning, Forms, **Processes** (highlighted), Documents, Schedule, Cost, Contacts, Calendar, and Submittals. The main content area is titled 'Project Processes' and shows a dropdown menu with 'Z_Test_DeleteMe - 19191919'. Below this is a search bar with 'Filter by...' and an 'Open' button. In the top right corner, there are links for 'Unfinished Drafts' and 'Import Processes', and a prominent blue 'Start process' button. A 'Filters' button with a '1' indicator is also present. The main area contains a table of process instances:

Instance ↑↓	State ↑↓	Subject ↑↓
CA - 1	Open	2020-05-21 Test Contract Approval
CCMSR - 1	Open	Test April (MPS - 43)
CCMSR - 2	Open	MPS for 05/16/2022 (MPS - 46)
CCMSR - 3	Open	MPS for 06/08/2022 (MPS - 49)
CCMSR - 4	Open	tdjdfhahjh test
CCP - 5	Open	2024-01-23 test



2. Search for 'rfi' and select 'RFI'

Select process ×

🔍 rfi ×

Request For Information - RFI Request (RFI)
RFI process

⬇️ Download Start



Fill out required fields:

Date Due defaults to 3 days from now, however it can be changed depending on what is in your contract.

Click “Documents” tab to attach supporting documentation.

Request For Information - RFI Request (RFI)

Start Process Print Check Spelling Submit Save Draft

Project:	Z_Test_DeleteMe
Project Number:	19191919
Process:	Request For Information - RFI Request
* Subject:	Garden Landscaping Phase 1 Plants 2024-08-28
* Date Due:	08.31.2024 05:00pm

Details Documents (0) Attached Processes (0) Attached Forms (0)

[Expand All](#) | [Collapse All](#)

* Request for information:	Could more specific guidance be provided on acceptable foliage?
* Change in contract?:	Select all that apply. <input type="checkbox"/> Cost <input type="checkbox"/> Schedule <input type="checkbox"/> Scope <input type="checkbox"/> None <input checked="" type="checkbox"/> TBD

Print Check Spelling Submit Save Draft



Raleigh

From here, the process splits based on division.

Construction Management – PSSP, and Construction Management – Parks, both go to the bottom workflow of the process.

If the initiator is in the “General Contractor/Design Builder” Business Type (set on their user page) then the process will skip them and go to the Designer or Consultant.

If a Designer/Consultant/AE started the process then it will go to the GC.

If you are working on a project for another division, skip to slide 16.



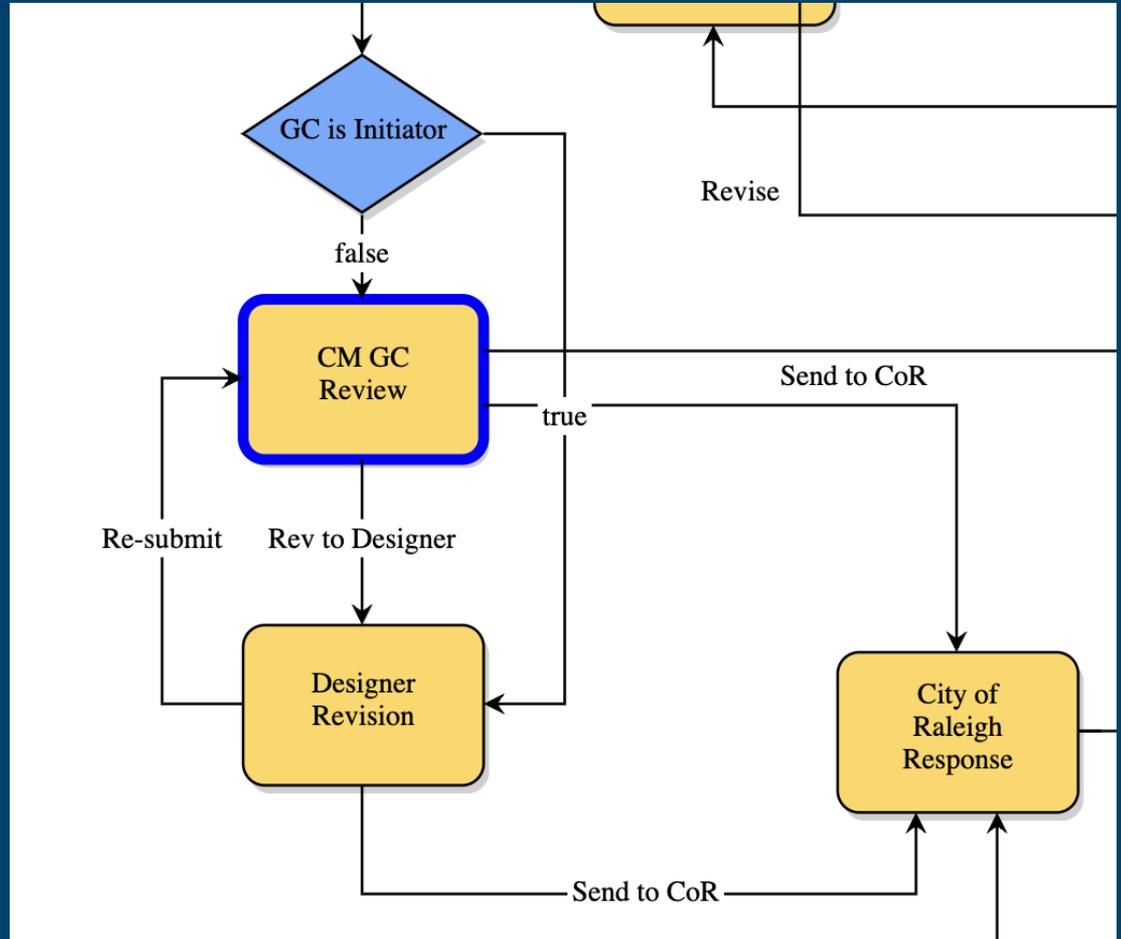
Raleigh

Diamonds = Conditionals

“If a GC created it, skip the CM GC Review step”

This avoids the poor process design of having a user touch a process twice sequentially.

If you are a GC and are seeing it twice immediately, let your PM know so we can fix it.





Designer Review:

Provide your response to the GC in the “Design Consultant Response” box.

Re-submit = return to GC

Send to CoR = send to City of Raleigh PM (as needed)

Process Doc [Action: Take Action] [Action: Check Spelling] [Action: Print] [Action: Copy] [Action: Delegate] [Action: Save] [Action: Cancel]

Project Number: 19191919

* Overall Due Date: 08.31.2024 05:00pm

Step Due Date:

Current Workflow Step: Designer Revision Show Workflow Diagram

* Subject: Garden Landscaping Phase 1 Plants 2l

Status: Submitted

Re-submit

Send to CoR

Show History | Current Actors

Details | Comments (1) | Documents (1) | Attached Processes (0) | Attached Forms (0) | Attached To (0)

Expand All | Collapse All

Contractor Response:

Design Consultant Response:

* Request for information:

* Change in contract?:

Sure, please see attached or section 3.11 of the plans.

Could more specific guidance be provided on acceptable foliage?

Select all that apply.

- Cost
- Schedule
- Scope
- None
- TBD

CM GC Review:

Provide your response to the GC in the “Contractor Response” box.

Accept/Close = Accept and close the process

Rev to Designer = Return it to the Designer/Consultant for additional input

Send to CoR = send to City of Raleigh PM (as needed)

Take Action Check Spelling Print Copy Delegate Save Cancel

Accept/Close
Rev to Designer
Send to CoR

Document: [Show History](#) | [Current Actors](#)

Current Workflow Step: **CM GC Review** [Show Workflow Diagram](#)

* Subject:

Status: Submitted

Project Number: 19191919

* Overall Due Date:

Step Due Date:

Details Comments (1) Documents (1) Attached Processes (0) Attached Forms (0) Attached To (0)

[Expand All](#) | [Collapse All](#)

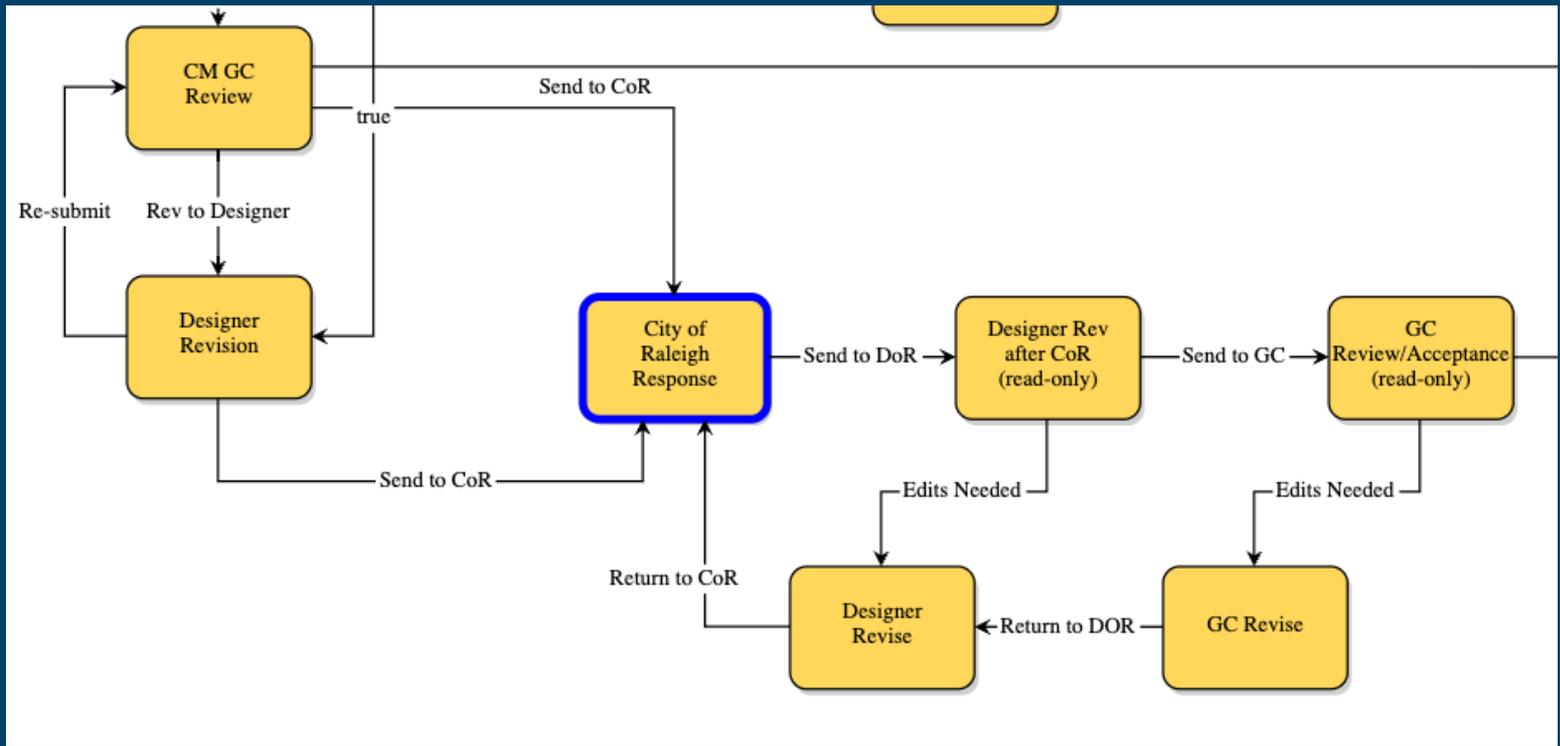
Request for information: Could more specific guidance be provided on acceptable foliage?

Change in contract?: Select all that apply.

Cost
 Schedule
 Scope
 None
 TBD

* Contractor Response:

Design Consultant Response: Sure, please see attached or section 3.11 of the plans.



City of Raleigh Response: CoR provides a response. After that, the process is read-only if accepted. If changes are needed you will need to send it back to yourself with the “Edits Needed” action.



Designer Rev
after CoR
(read-only)
step:

Take action
“Send to GC”
if everything
looks good, or
“Edits
Needed”

		<input type="button" value="Take Action"/>		<input type="button" value="Check Spelling"/>		<input type="button" value="Print"/>		<input type="button" value="Copy"/>		<input type="button" value="Delegate"/>		<input type="button" value="Save"/>	
Process	Edits Needed	Show History Current Actors		Project Number: 19191919		* Overall Due Date: <input type="text" value="08.31.2024"/> <input type="button" value="Calendar"/>							
Current Workflow Step:	Designer Rev after CoR (read-only)	Show Workflow Diagram		Step Due Date:									
* Subject:	<input type="text" value="Garden Landscaping Phase 1 Plants"/>												
Status:	Submitted												

Details	<input type="button" value="Comments (1)"/>	<input type="button" value="Documents (1)"/>	<input type="button" value="Attached Processes (0)"/>	<input type="button" value="Attached Forms (0)"/>	<input type="button" value="Attached To (0)"/>
----------------	---	--	---	---	--

[Expand All](#) | [Collapse All](#)

Contractor Response:	Ok
Design Consultant Response:	Sure, please see attached or section 3.11 of the plans.
Request for information:	Could more specific guidance be provided on acceptable foliage?
Change in contract?:	Select all that apply. TBD
City of Raleigh Response:	Native plant species are required.

<input type="button" value="-- Please select an action -- v"/>	<input type="button" value="Take Action"/>	<input type="button" value="Check Spelling"/>	<input type="button" value="Print"/>	<input type="button" value="Copy"/>	<input type="button" value="Delegate"/>	<input type="button" value="Save"/>
--	--	---	--------------------------------------	-------------------------------------	---	-------------------------------------



GC
Review/Acceptance (read-only) step:

Take action
“Accept/Close”
if everything
looks good, or
“Edits
Needed”

✓ -- Please select an action --

Take Action Check Spelling Print Copy Delegate Save

Process Name: me

Project Number: 19191919

* Overall Due Date: 08.31.2024 05:00

Step Due Date:

Current Workflow Step: GC Review/Acceptance (read-only)

Show History | Current Actors

Show Workflow Diagram

* Subject: Garden Landscaping Phase 1 Plants

Status: Submitted

Details Comments (1) Documents (1) Attached Processes (0) Attached Forms (0) Attached To (0)

Expand All | Collapse All

Request for information:	Could more specific guidance be provided on acceptable foliage?
Change in contract?:	Select all that apply. TBD
Contractor Response:	Ok
Design Consultant Response:	Sure, please see attached or section 3.11 of the plans.
City of Raleigh Response:	Native plant species are required.



GC Revise step:

Edit your response and then click Return to DOR to send it back to the Designer, who will send it to COR and restart the loop

Return to DOR Take Action Check Spelling Print Copy Delegate Save			
Project:	Z_Test_DeleteMe	Project Number:	19191919
Process Document:	RFI - 10 Show History Current Actors	* Overall Due Date:	<input type="text" value="08.31.2024"/> <input type="text" value="05:0"/>
Current Workflow Step:	GC Revise Show Workflow Diagram	Step Due Date:	
* Subject:	<input type="text" value="Garden Landscaping Phase 1 Plants"/>		
Status:	Submitted		

Details	Comments (1)	Documents (1)	Attached Processes (0)	Attached Forms (0)	Attached To (0)
----------------	--------------	---------------	------------------------	--------------------	-----------------

[Expand All](#) | [Collapse All](#)

Request for information:	Could more specific guidance be provided on acceptable foliage?
Change in contract?:	Select all that apply. TBD
* Contractor Response:	<input type="text" value="Ok, will take time to source"/>
Design Consultant Response:	Sure, please see attached or section 3.11 of the plans.
City of Raleigh Response:	Native plant species are required.



GC Revise step:

A comment is also required after taking the action, it will automatically pop up

Add a comment.

*** Add Comment**

Private

See revised attachment.



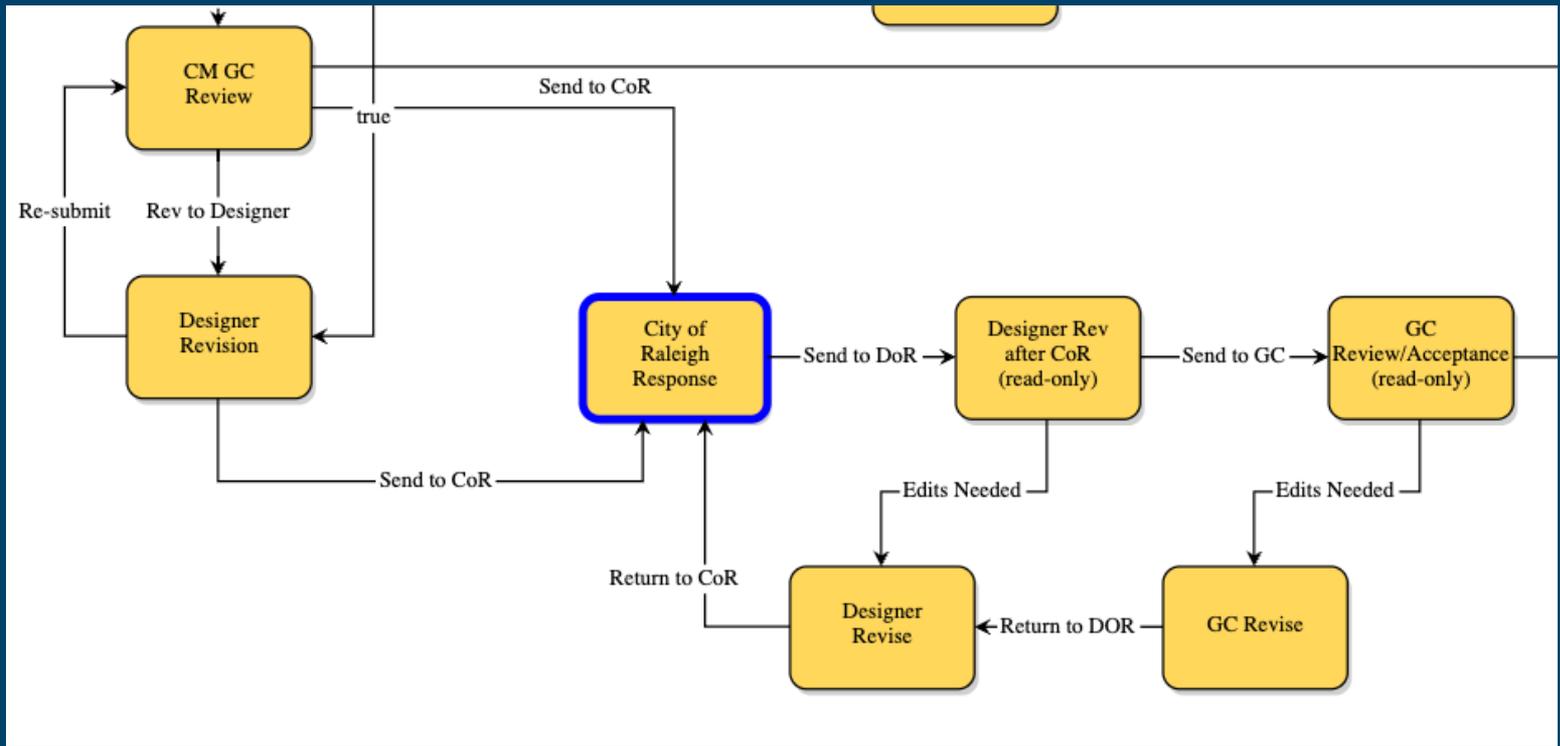
Designer Revise
step:

Edit your
response and
then take action
“Return to CoR”

Details | Comments (2) | Documents (1) | Attached Processes (0) | Attached Forms (0) | Attached To (0)

[Expand All](#) | [Collapse All](#)

Contractor Response:	Ok, will take time to source
* Design Consultant Response:	Sure, please see attached or section 3.11 of the plans.
* Request for information:	Could more specific guidance be provided on acceptable foliage?
* Change in contract?:	Select all that apply. <input type="checkbox"/> Cost <input type="checkbox"/> Schedule <input type="checkbox"/> Scope <input type="checkbox"/> None <input checked="" type="checkbox"/> TBD
City of Raleigh Response:	Native plant species are required.



CoR will review and then send it back to you again, read-only, for acceptance. This is the end of the RFI guide for the Construction Management divisions.



RFI's for Roadway Design and Construction and Stormwater



Design Consultant Step:
Provide your response.
Attach supporting documents to the "Documents" tab as needed.
Take the Review action to send it to the City PM for verification.

Details | Comments (0) | Documents (0) | Attached Processes (0) | Attached Forms (0) | Attached To (0)

[Expand All](#) | [Collapse All](#)

Where to route?

Does this need Senior Project Manager review?:	No	Does this need Design Consultant review?:	Yes
--	----	---	-----

Request for information: Change in contract?: Contractor Response: Senior Project Manager Response: * Design Consultant Response:	What plants are acceptable? Select all that apply. TBD <input type="text" value="Drought tolerant native species."/>
---	---

Review Tracking

Project Manager Review By: Senior Project Manager Review By:	Peter Sherman
---	---------------

-- Please select an action -- ▾ | **Take Action** | **Check Spelling** | **Print** | **Copy** | **Delegate** | **Save**



Response Acknowledged Step: Take the action to indicate your Acknowledgement of the RFI. At any time, you may click “Show History” at the top to see previous steps and actions taken.

Acknowledge ▼ **Take Action** **Check Spelling** **Print** **Copy** **Delegate** **Save**

Project:	z_Stormwater Test Project	Project Number:	007
Process Document:	RFI - 1 Show History Current Actors	* Overall Due Date:	<input type="text" value="09.09.2024"/> <input type="calendar"/> <input type="text" value="05:00pm"/> ▼
Current Workflow Step:	Response Acknowledged Show Workflow Diagram	Step Due Date:	
* Subject:	<input type="text" value="Lower Longview Dam Outfall Stream Stabiliz"/>		
Status:	Submitted		

Details **Comments (0)** **Documents (0)** **Attached Processes (0)** **Attached Forms (0)** **Attached To (0)**

[Expand All](#) | [Collapse All](#)

Request for information:	What plants are acceptable?
Change in contract?:	Select all that apply. TBD
Contractor Response:	
Design Consultant Response:	Drought tolerant native species.
Formal Response:	Less than 20' tall and canopy no more than 8' diameter.

Review Tracking

Project Manager Review By:	Peter Sherman
Senior Project Manager Review By:	
Design Consultant Review By:	Peter Sherman

Acknowledge ▼ **Take Action** **Check Spelling** **Print** **Copy** **Delegate** **Save**



End RFI Help Documentation