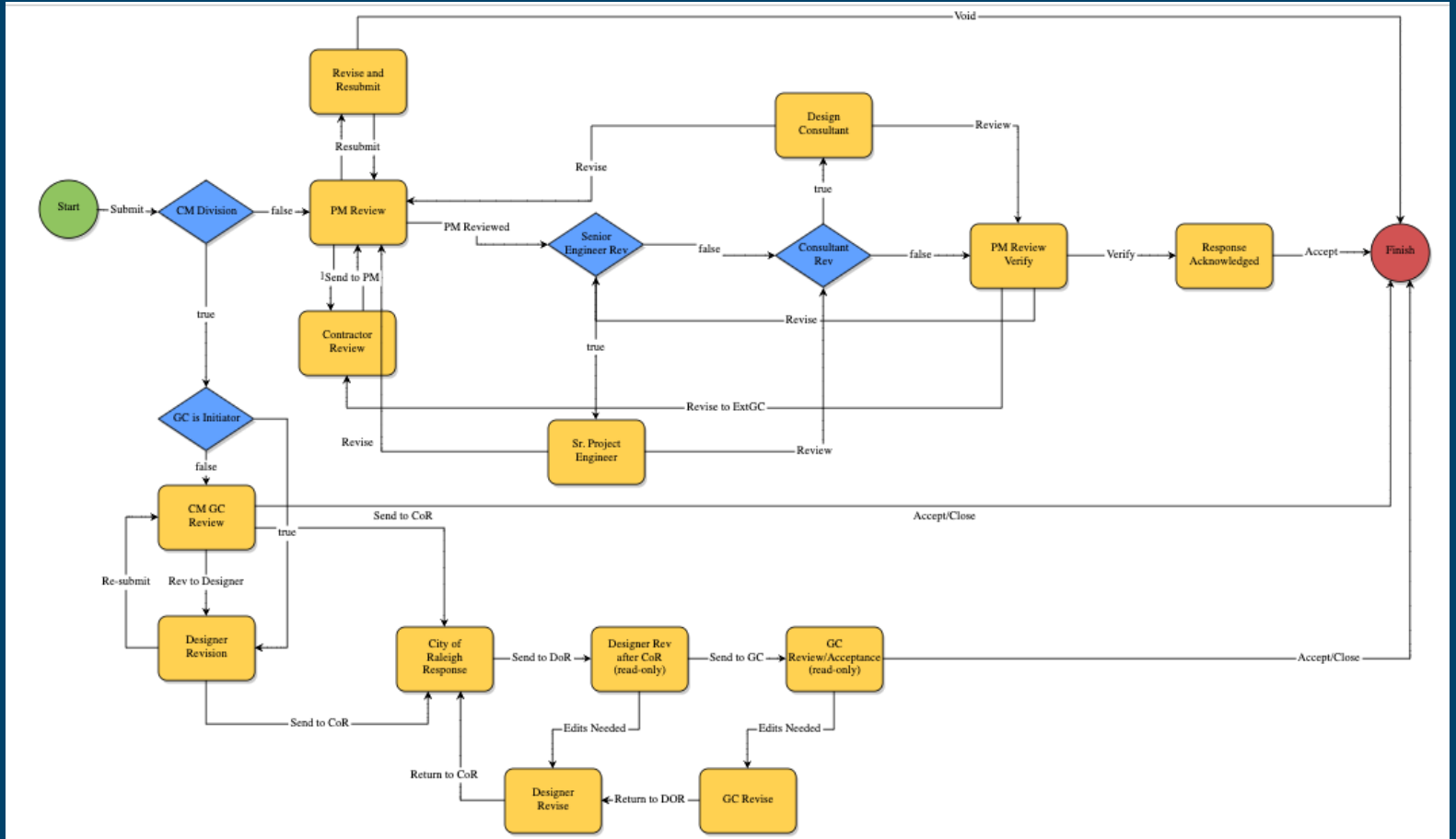
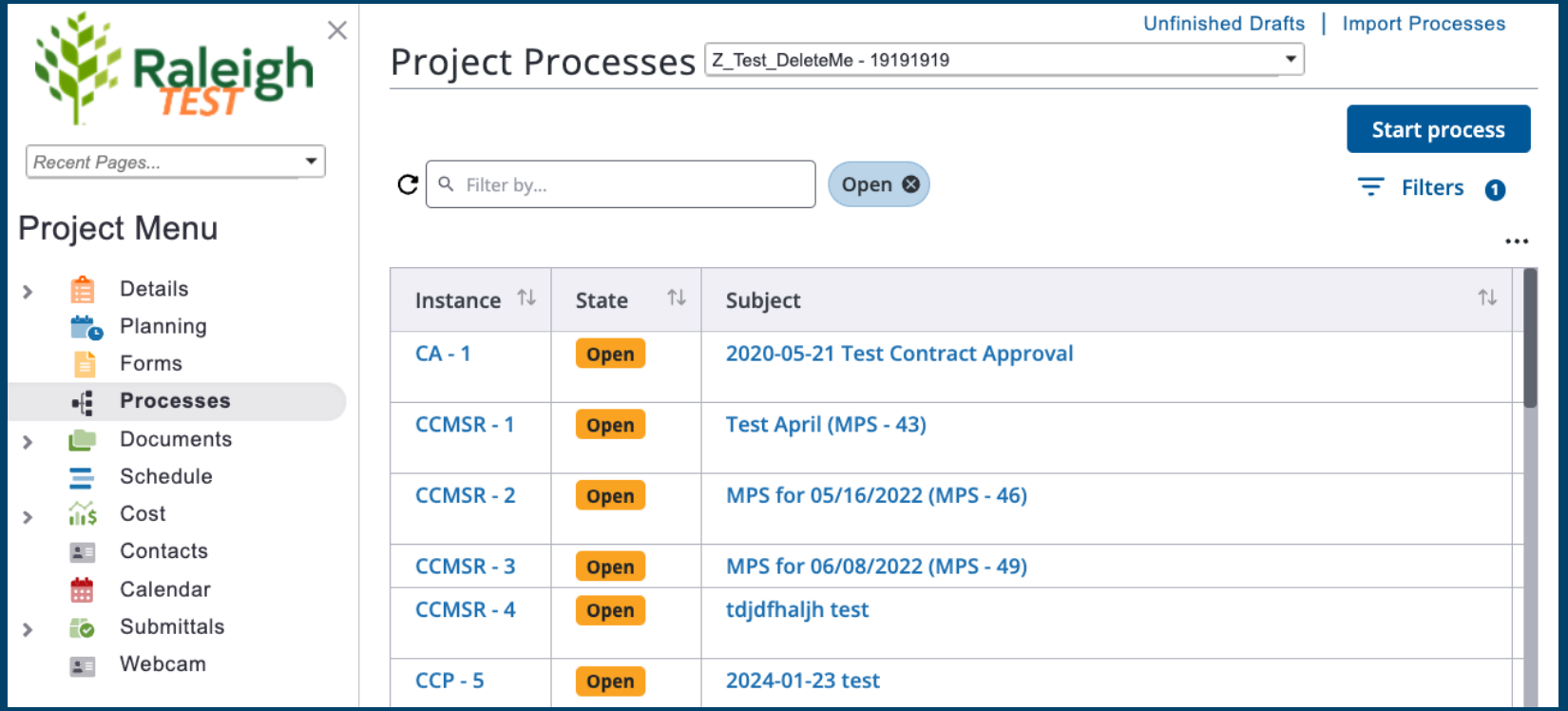
RFI – Request for Information

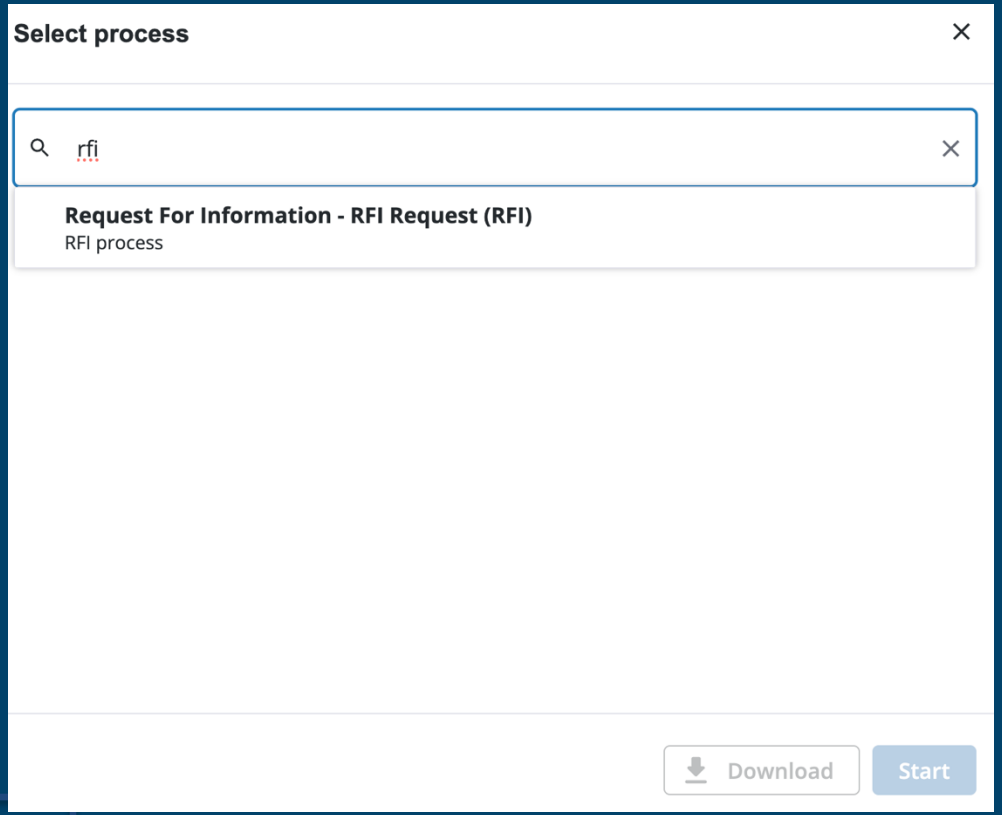


Raleigh

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



2. Search for ‘rfi’ and select ‘RFI’



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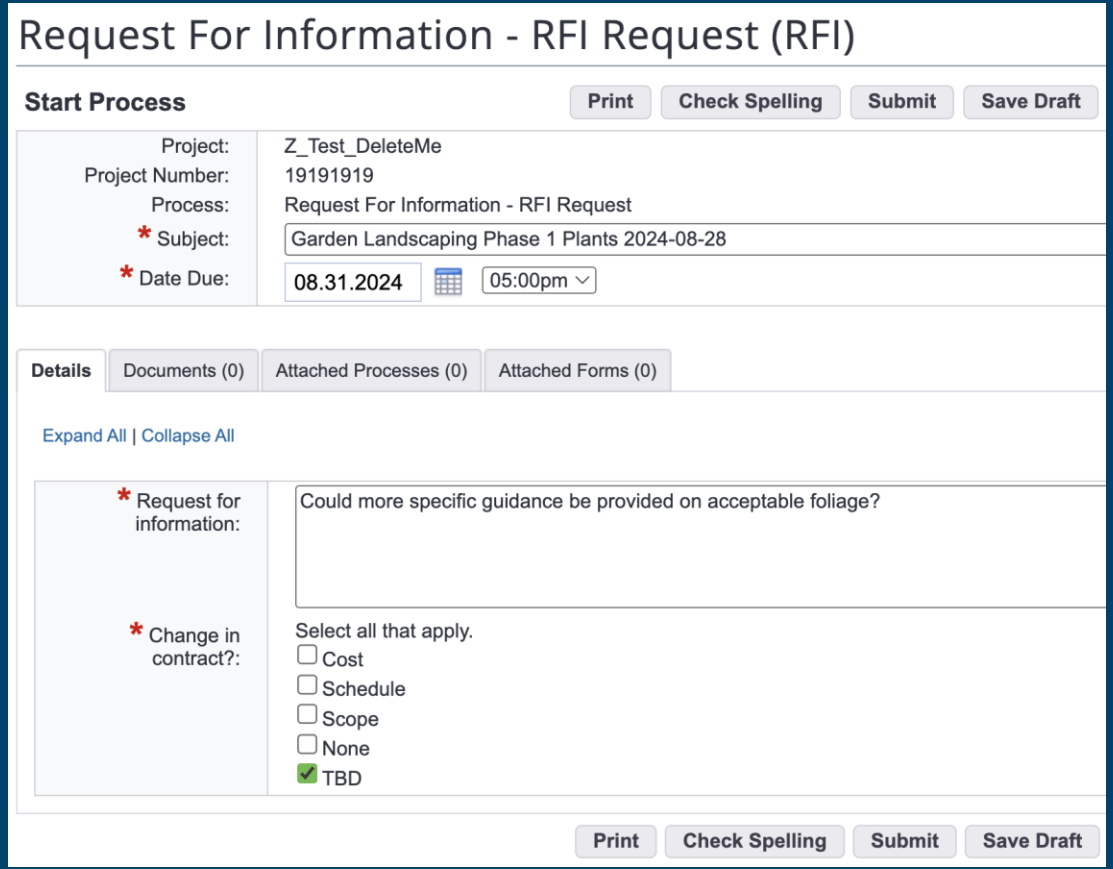
Fill out required fields:

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.



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 Constractor/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.

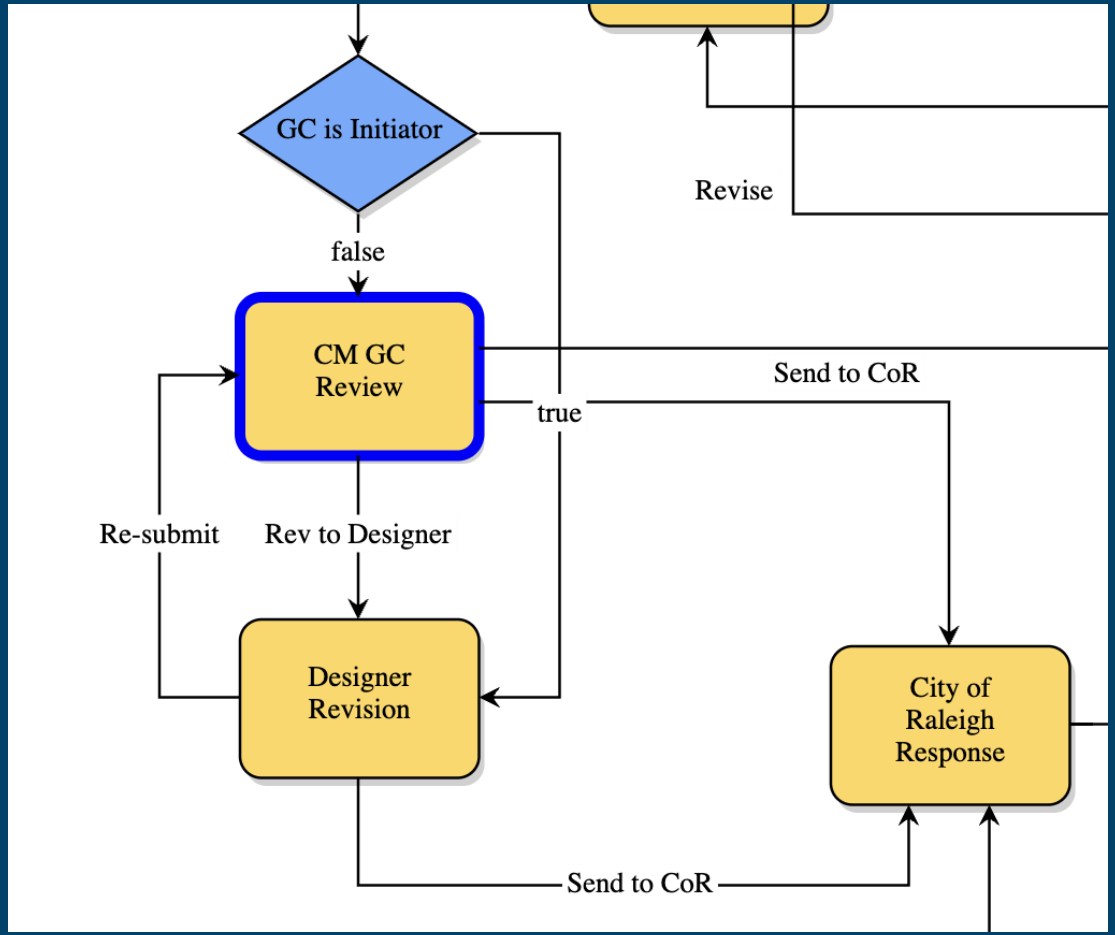
Raleigh

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.



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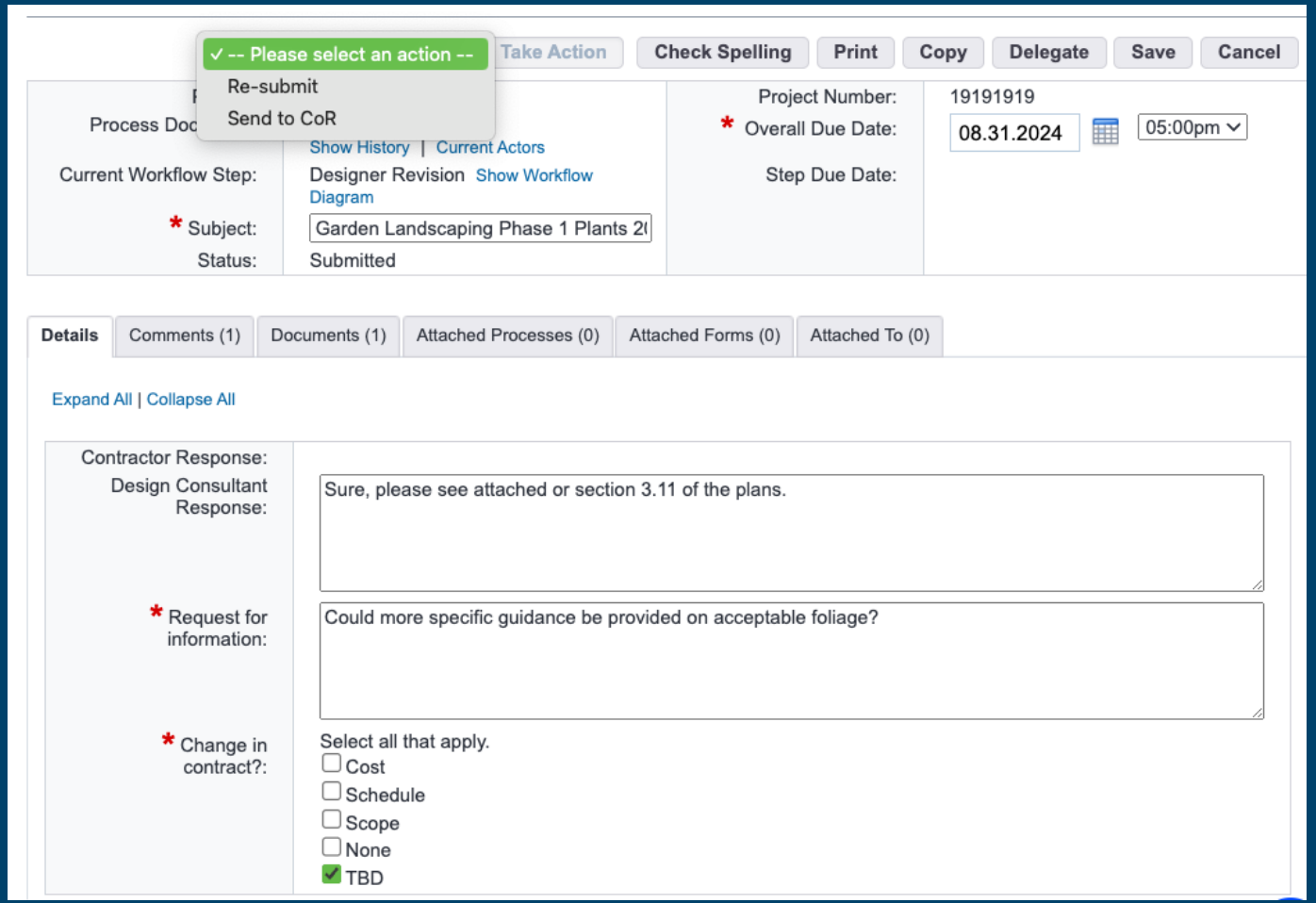
Designer Review:

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)



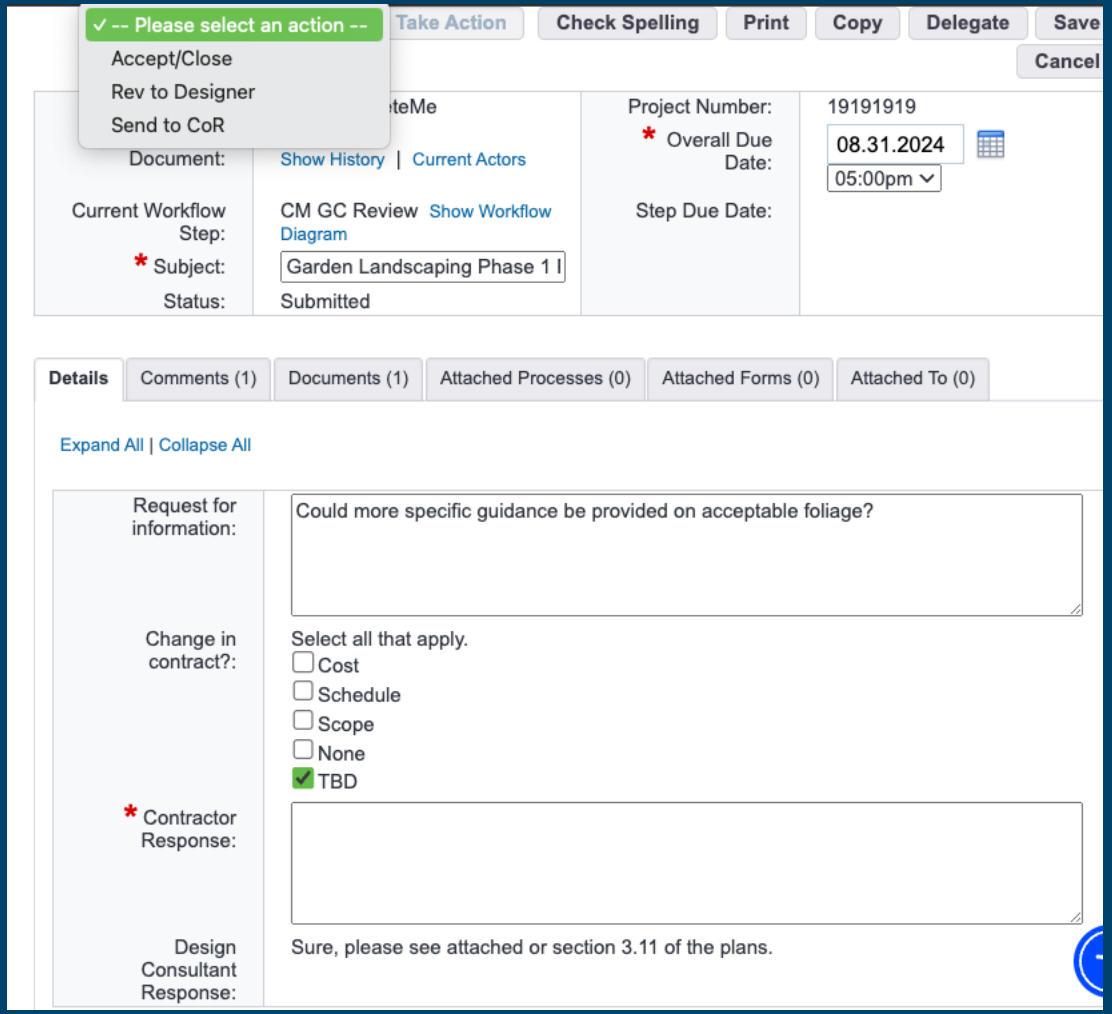
CM GC Review:

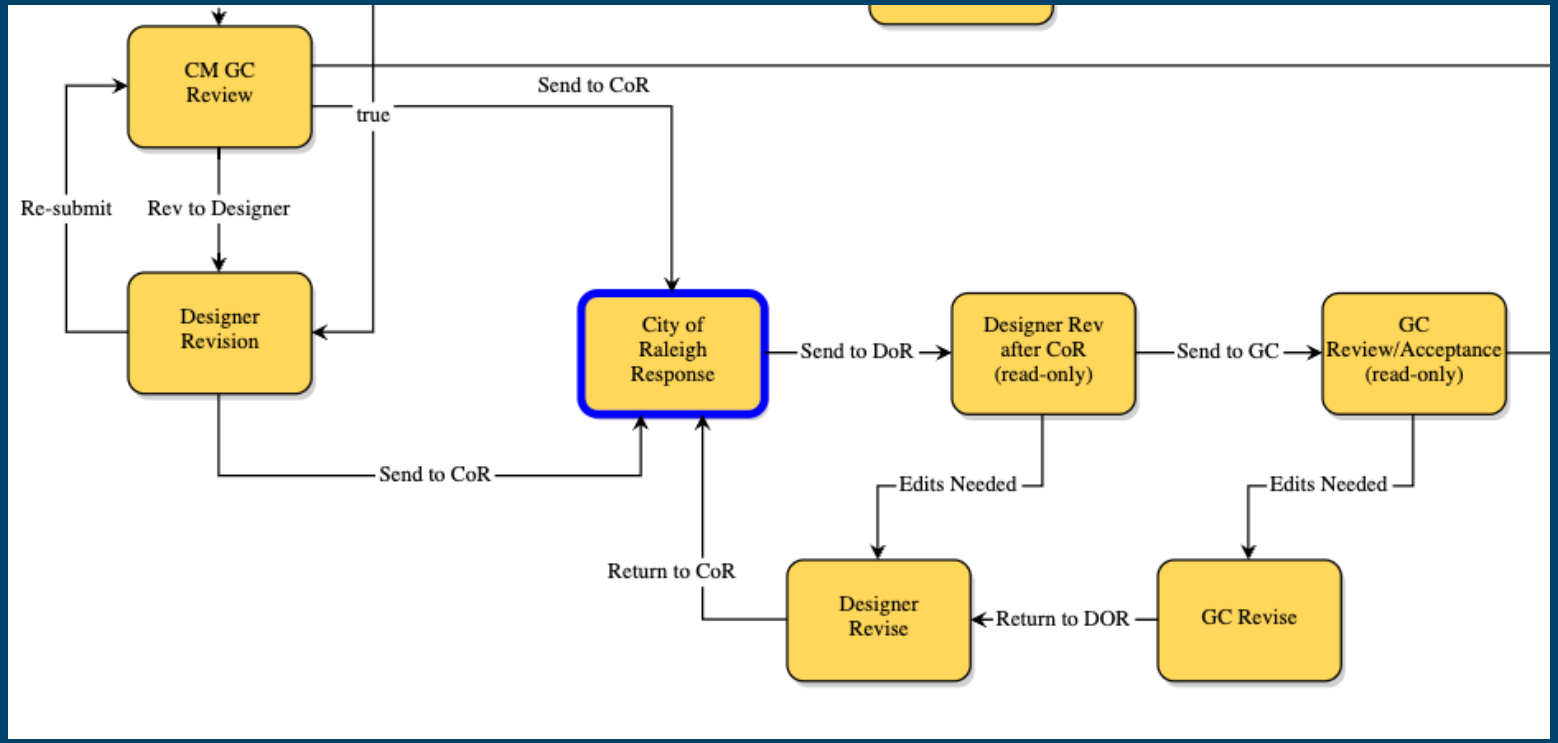
Provide your response to the GC in the “Contractor Response” box.

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)



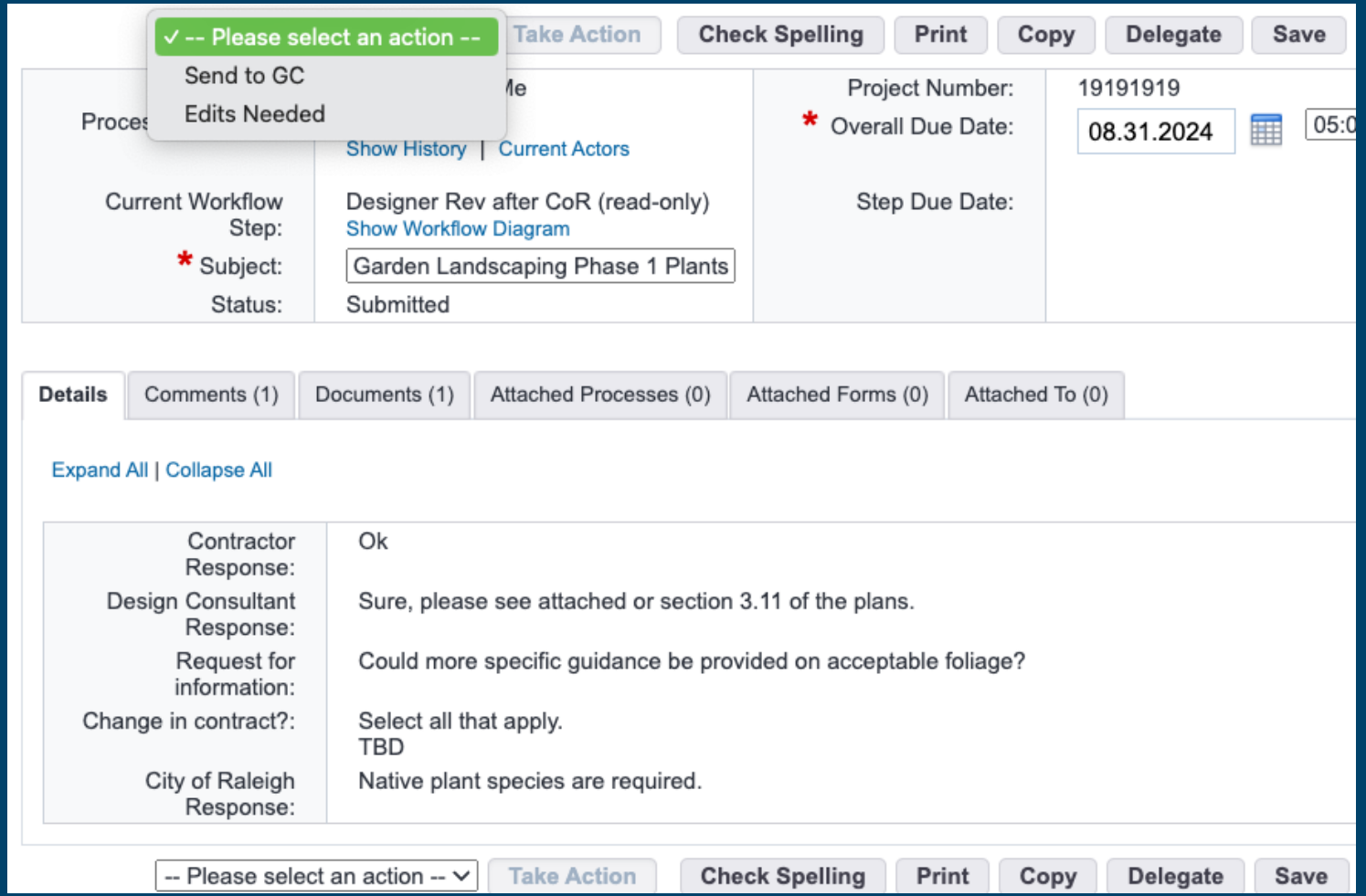


City of Raleigh Response: CoR provides a response. After that, the process is read-only if accepted. If changes are needed you will need to send it back to yourself with the “Edits Needed” action.

Raleigh

Designer Rev after CoR (read-only) step:

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



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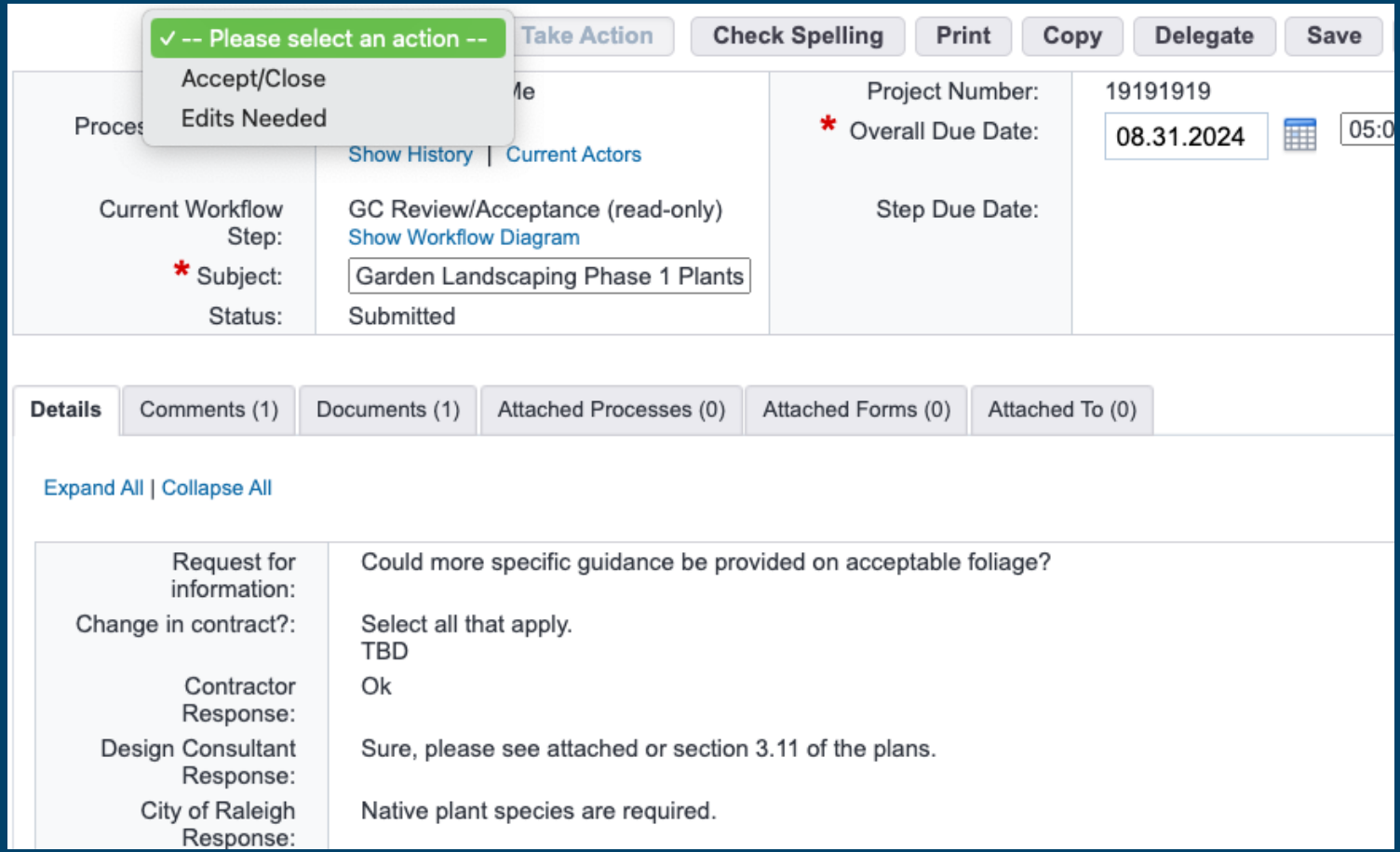
GC Review/Acceptance (read-only) step:

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



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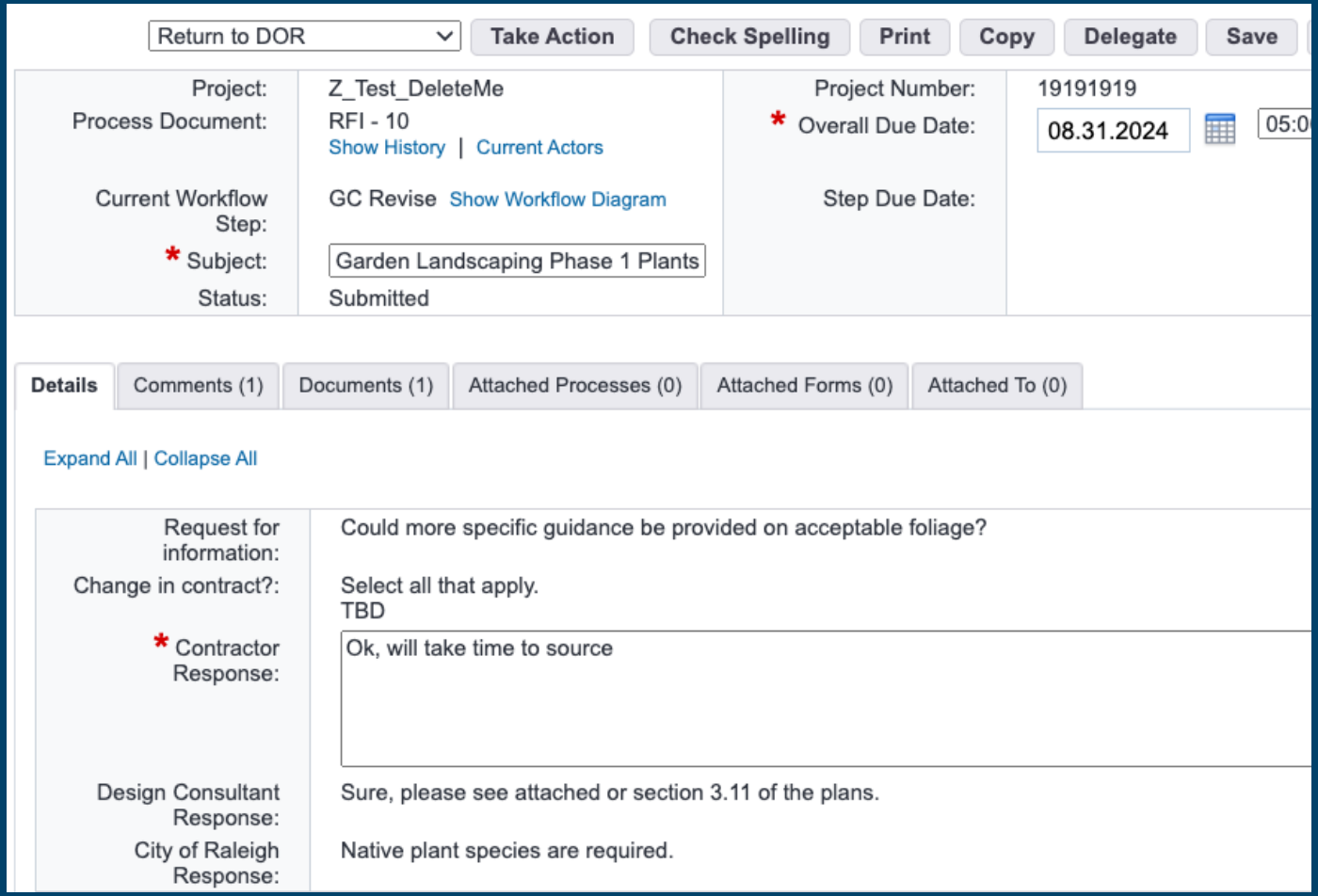
GC Revise step:

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



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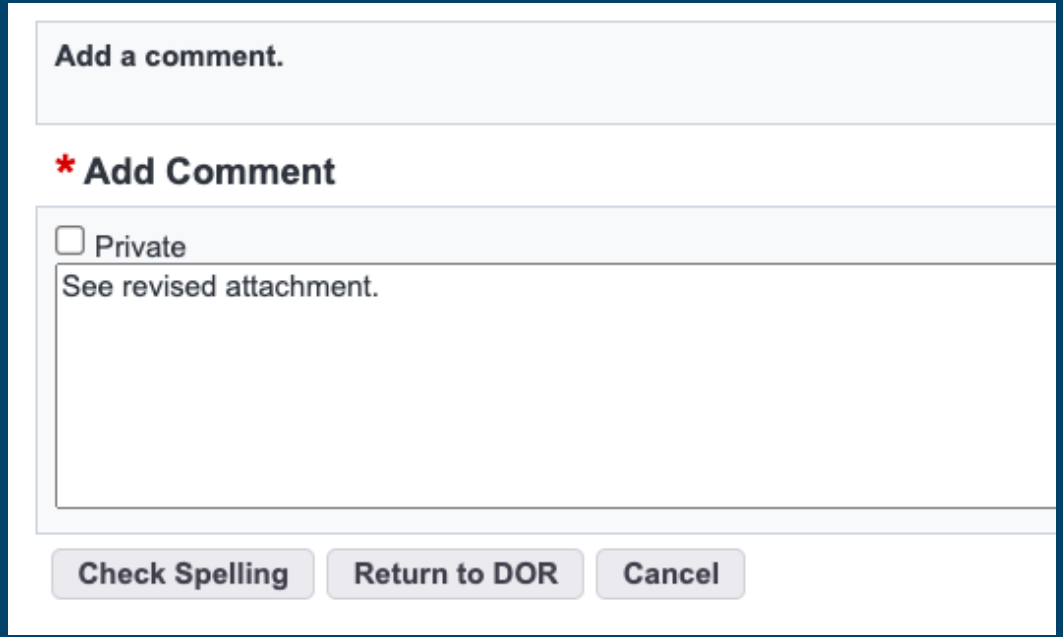
GC Revise step:

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



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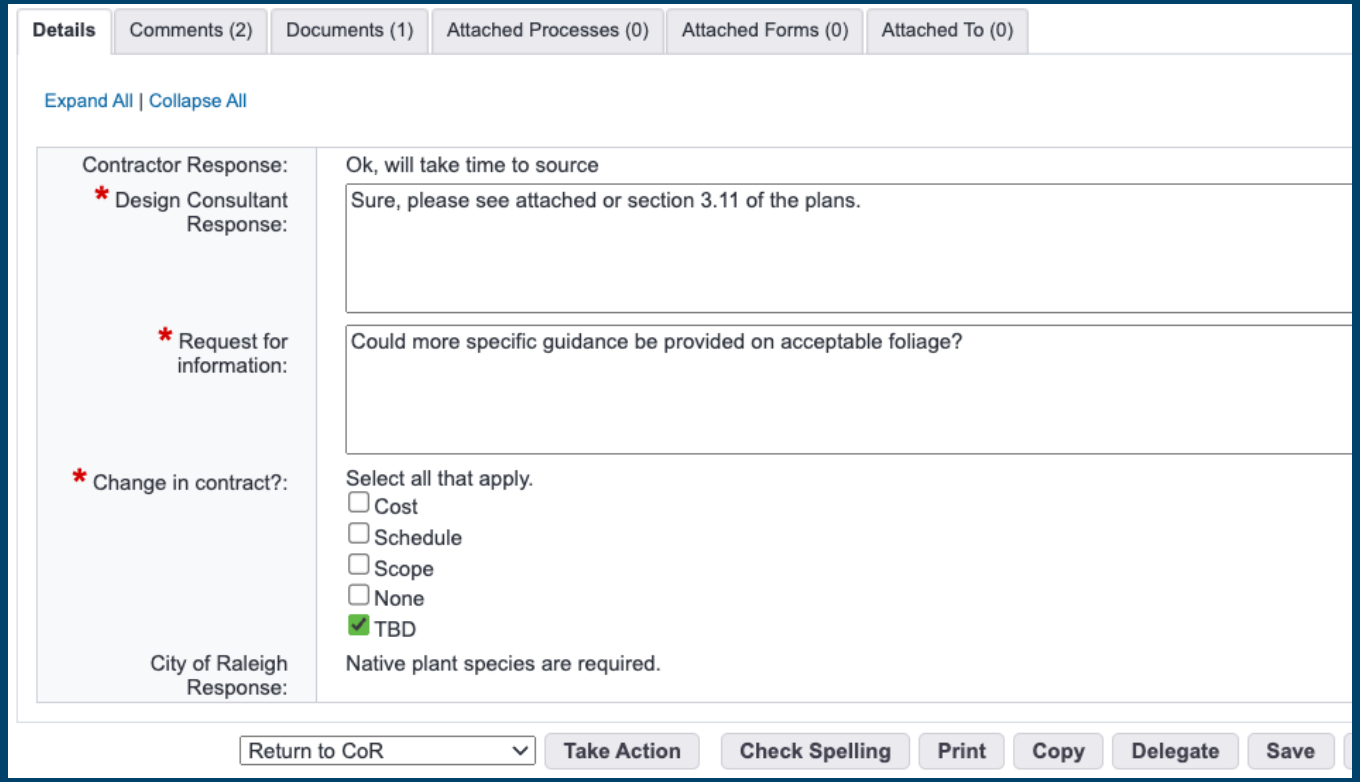
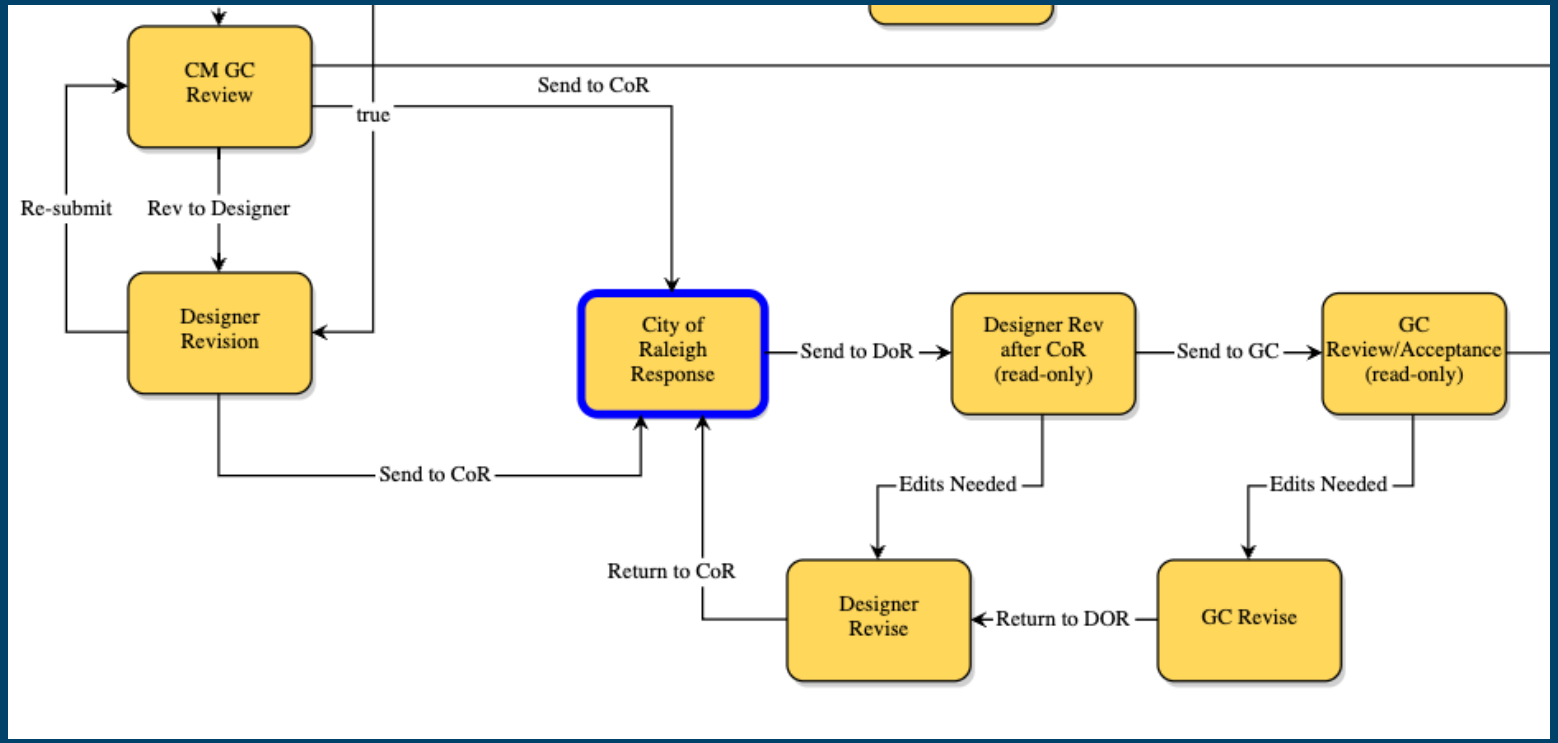
Designer Revise step:

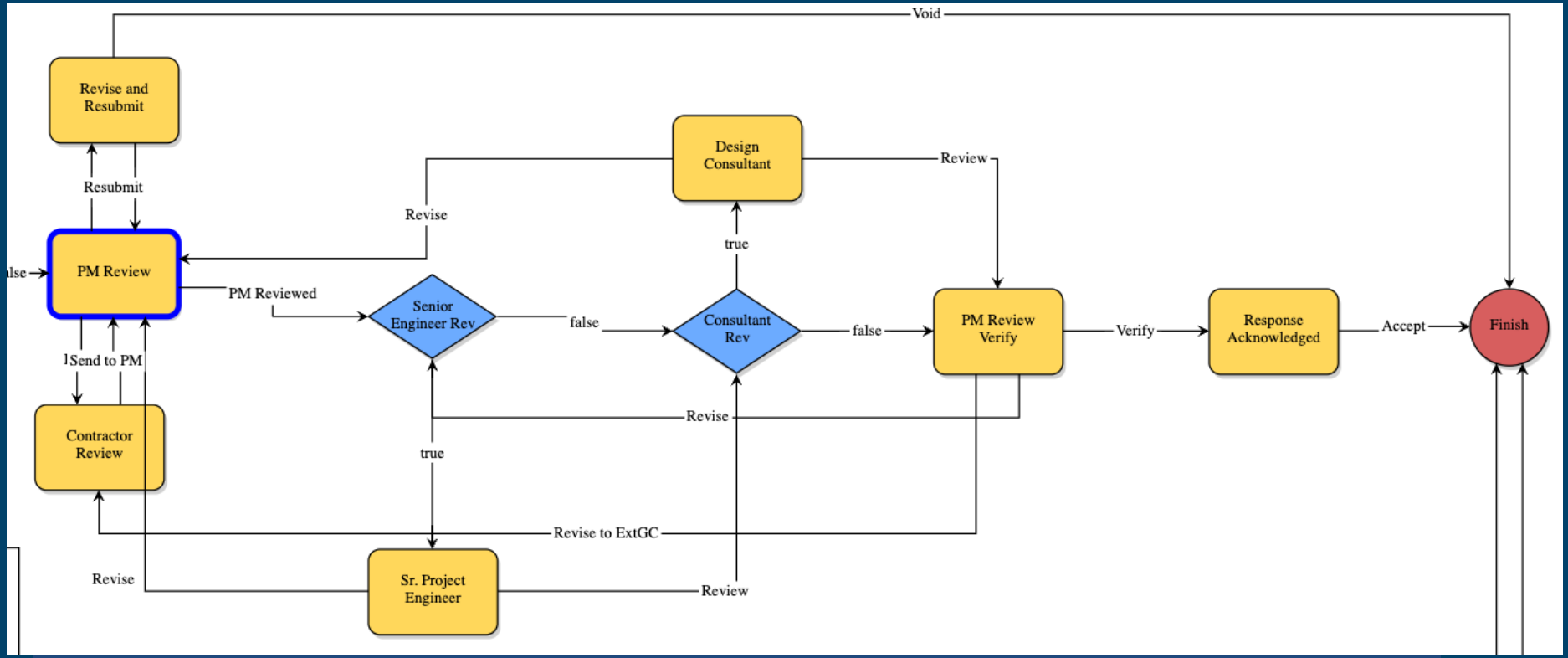
Edit your response and then take action “Return to CoR”





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



Process immediately goes to the City Project Manager for review

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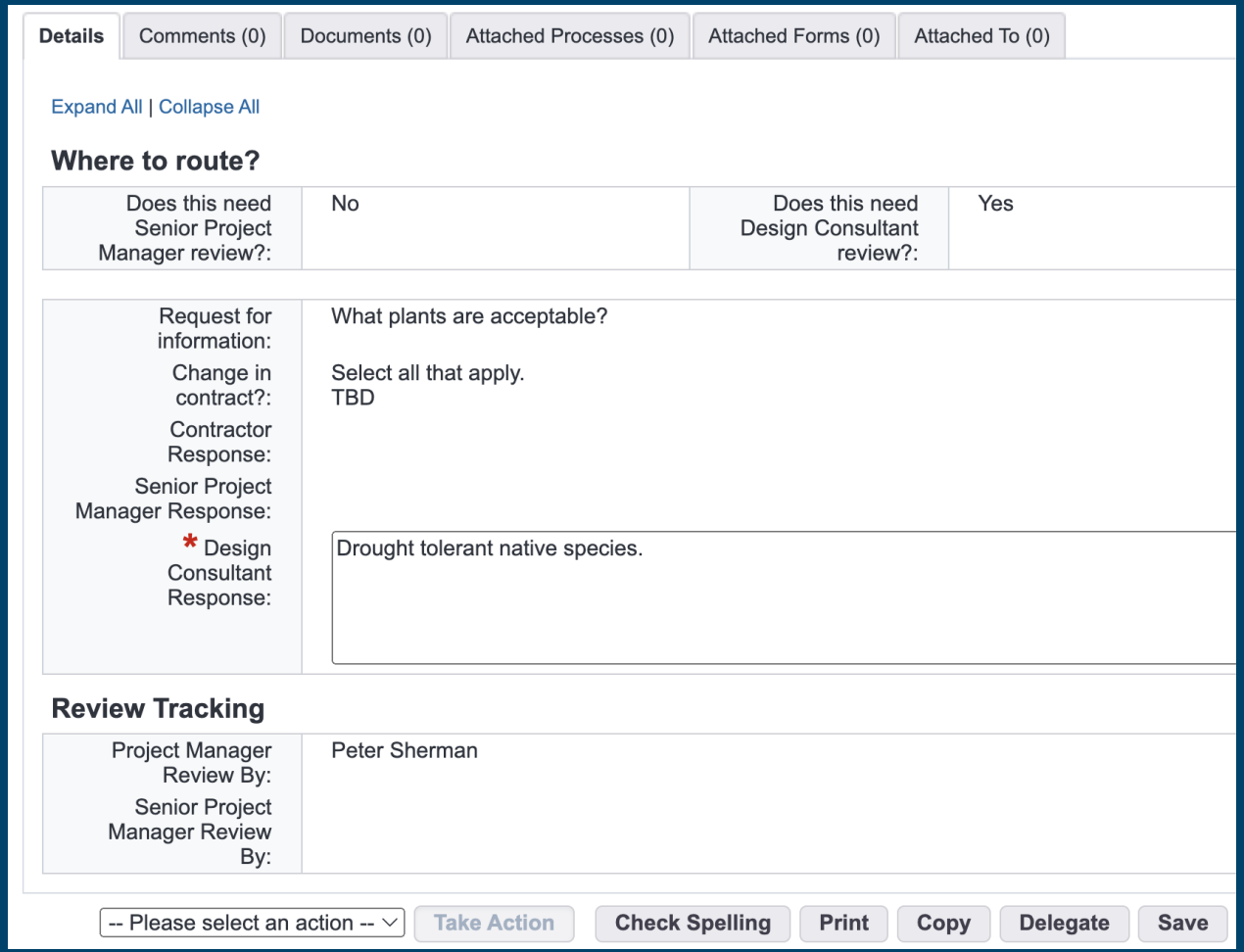
Design Consultant Step:
Provide your response.
Attach supporting documents to the “Documents” tab as needed.
Take the Review action to send it to the City PM for verification.



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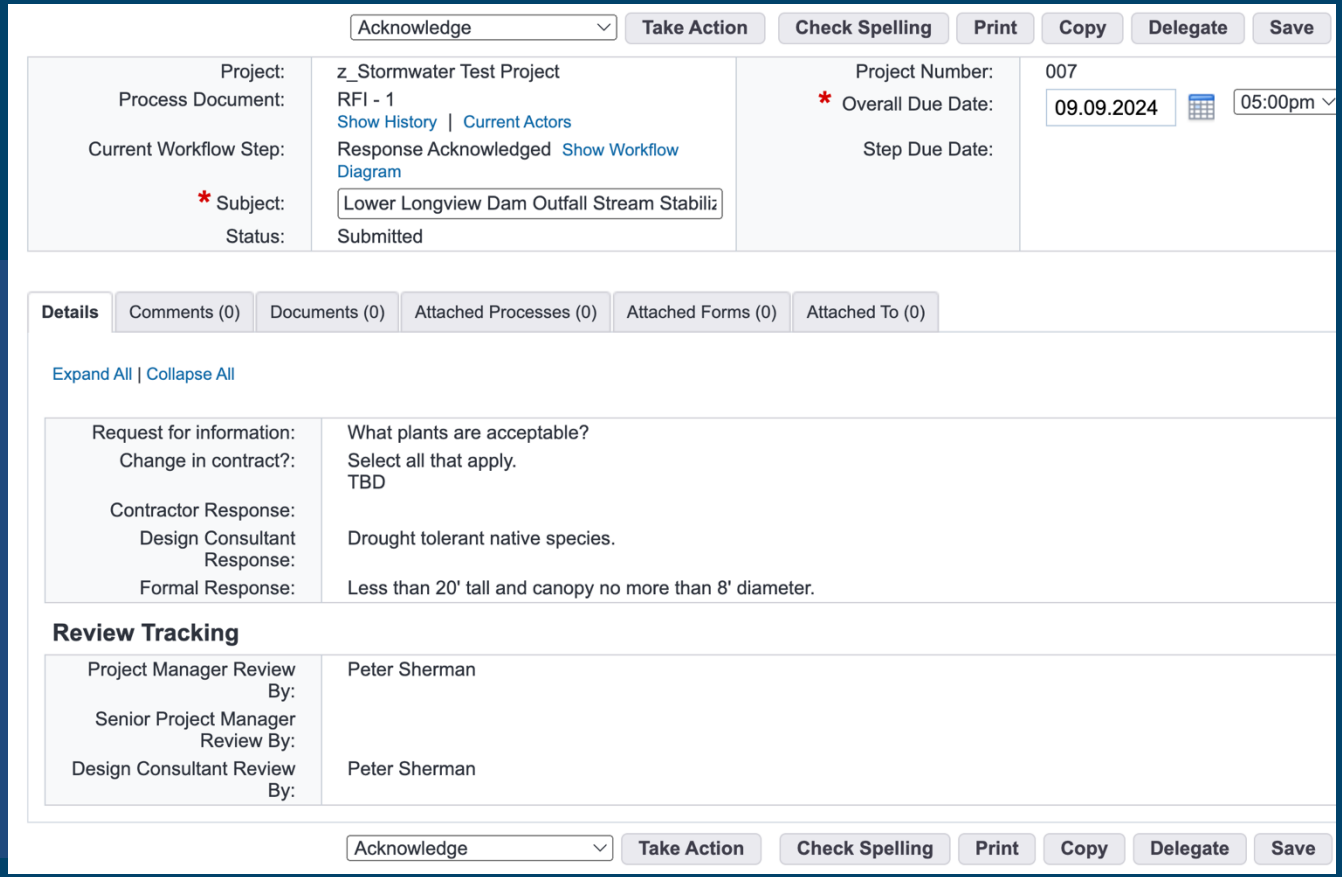
Response Acknowledged Step: Take the action to indicate your Acknowledgement of the RFI.
At any time, you may click “Show History” at the top to see previous steps and actions taken.



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End RFI Help Documentation