RFI/Issue Tracker

What Is The RFI Feature?

The RFI tool can be used by a project's general contractor to submit requests for information through Projectmates to be reviewed and answered. This tool expedites the entire Q & A process between project team members in the field and those in the office.

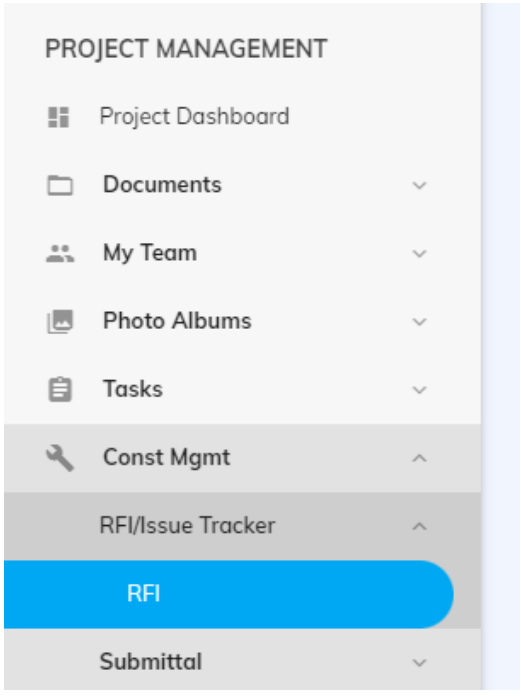
A project administrator sets up automatic routing to the main point of contact for answering RFIs – typically the architect or project manager. When an RFI is generated, it appears in that contact's 'My Work' section and automatically sends them a notification email. That person can either route the RFI to another user for input if needed, or answer the RFI right then, issuing the final response to the contractor.

- Straightforward, easy-to-use form to generate an RFI.
- Expedited review process where relevant parties are notified immediately through email and within the software.
- Easy for review parties to collaborate on responding to RFIs, ensuring quicker average turnaround and getting responses to the contractor much more quickly.

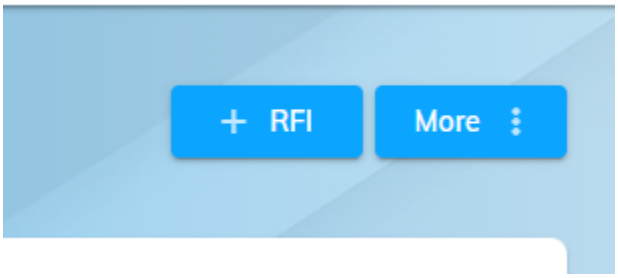
Create An RFI

To begin creating an RFI, navigate into the project you want to create RFIs for through the My Projects page.

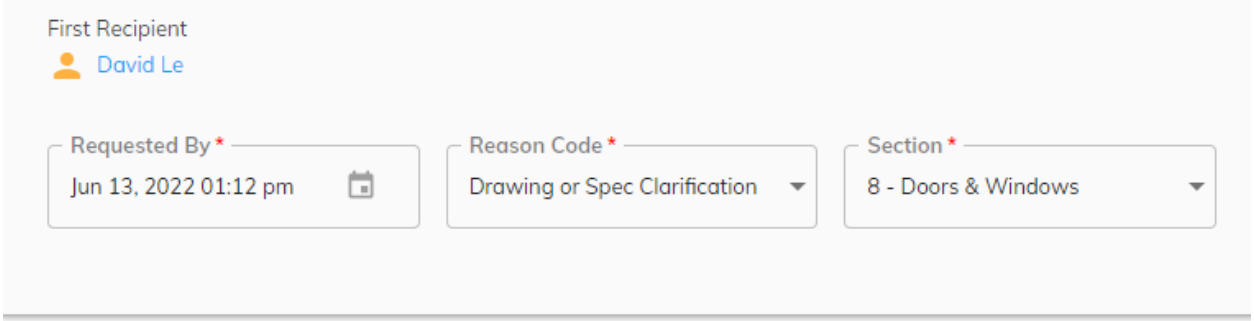
1. Once inside a project, the RFI tool can typically be found on the left-side menu in **Construction Mgmt > RFI/Issue Tracker**.

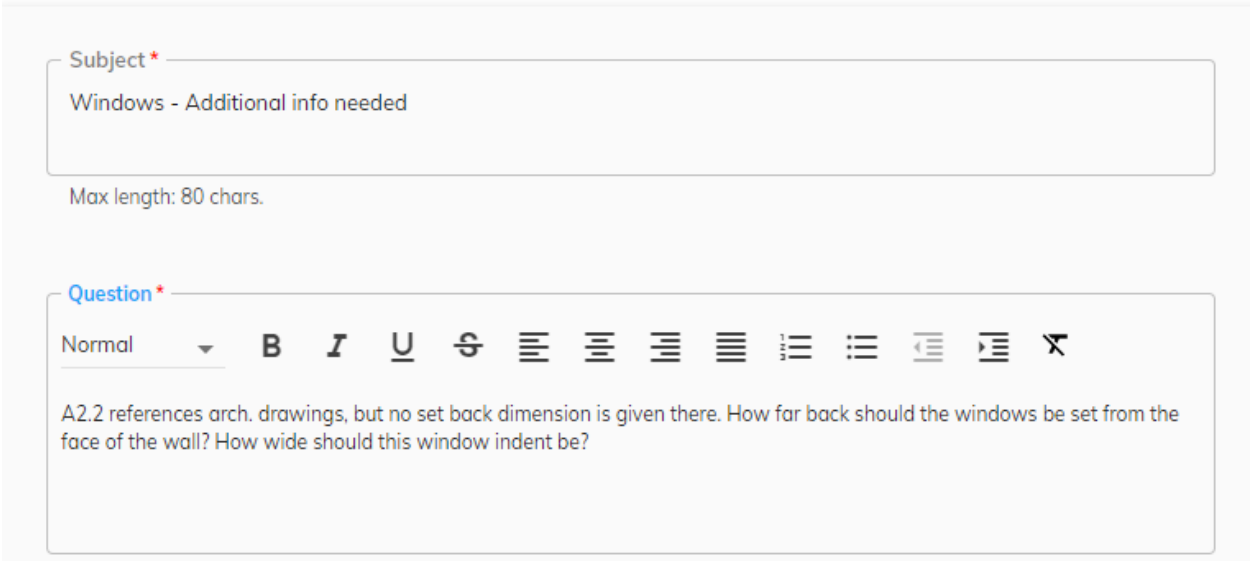


2. Once inside of the RFI tool, click the **+ RFI** button found on the upper right to begin creating a new RFI.

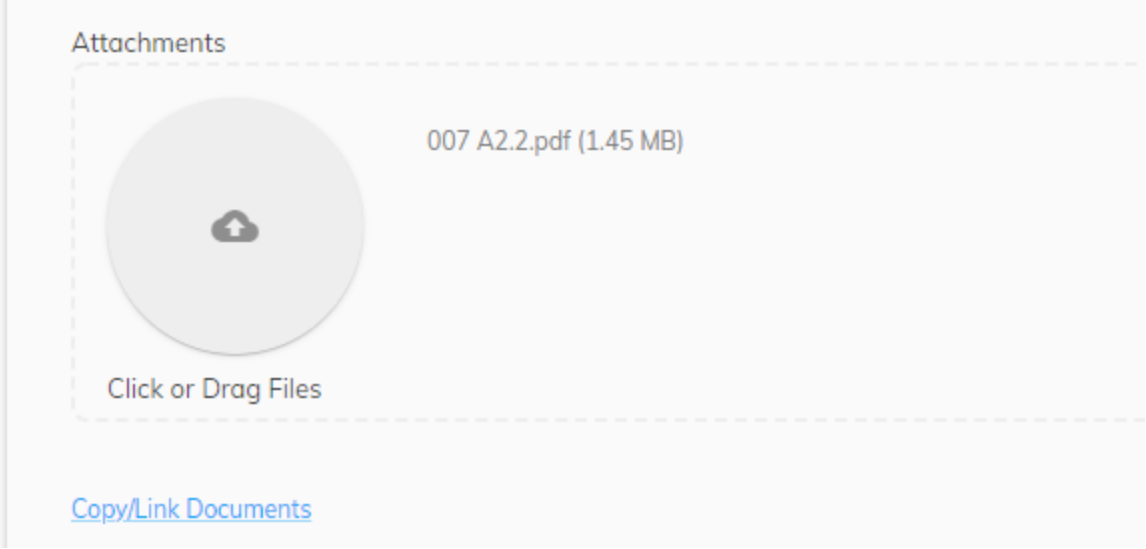


3. Fill out the mandatory fields: **Reason Code, Section, Subject, Question**.
4. All other fields are optional and can be filled out when appropriate. For example, **Reference #** can be used to house the RFI's number from another software system.

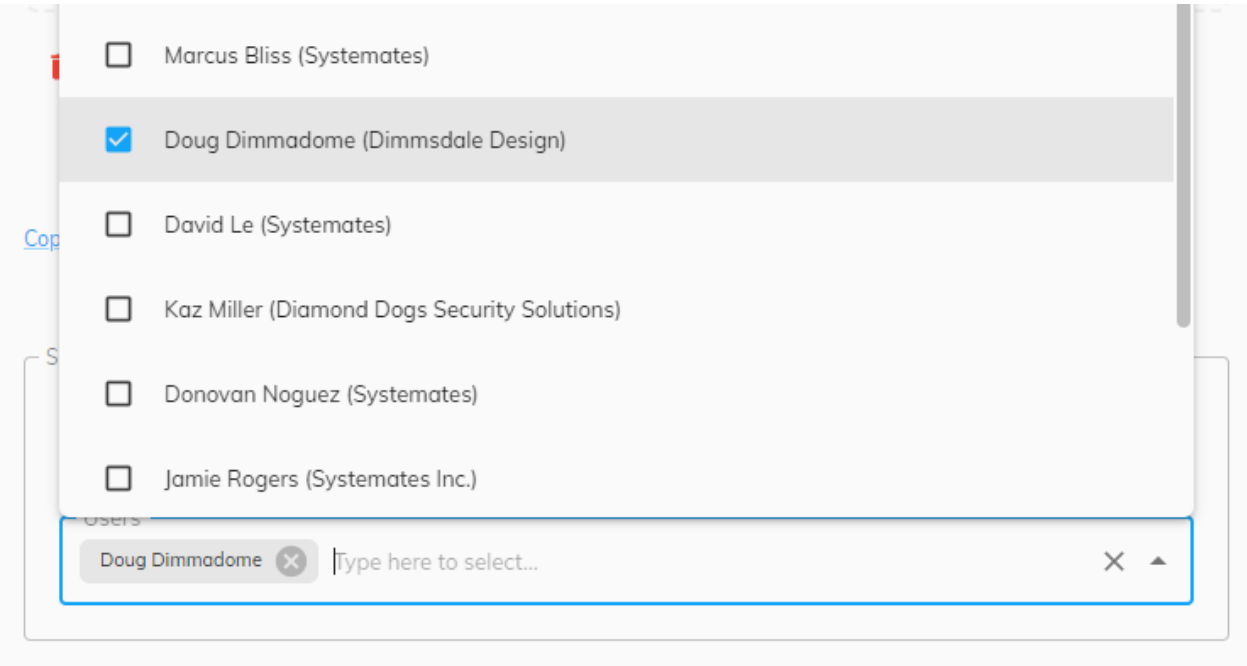




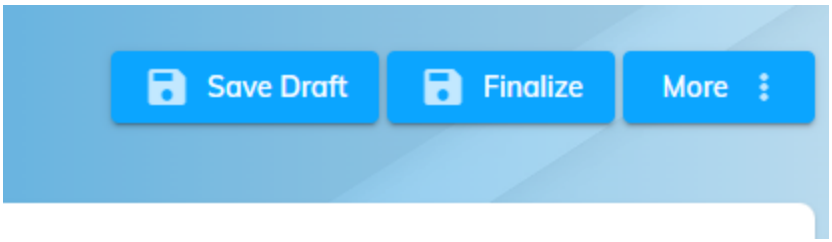
5. The **Attachments** area can be used to upload any files you want to accompany your RFI. If the file has already been uploaded separately into the Documents tool, then you can use **Copy/Link Documents** to either make a copy of the file or link your RFI directly to it.



6. At the top of the RFI, you can see the designated First Recipient (Typically the Architect or Project Manager) that will be initially responsible for either answering your RFI or routing it to the appropriate parties.
7. In the **Select who you want to email** area, some users may have been automatically populated. They will receive an email copy of your RFI once it has been submitted. You can CC additional users by using the drop-down menu and checking the boxes next to them.



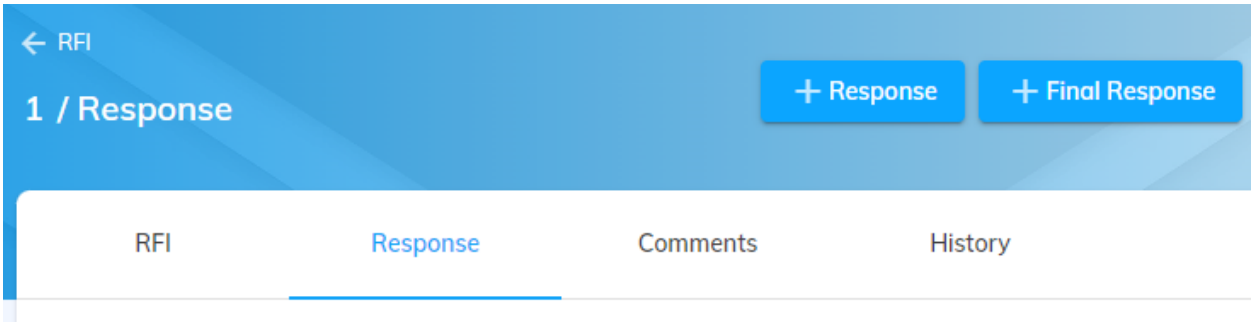
8. Once you've completed your RFI, click **Finalize** at the top of the RFI to send it out to be reviewed. Alternatively, you can click **Save Draft** to complete the RFI later. Draft RFIs can be accessed from the RFI log page.



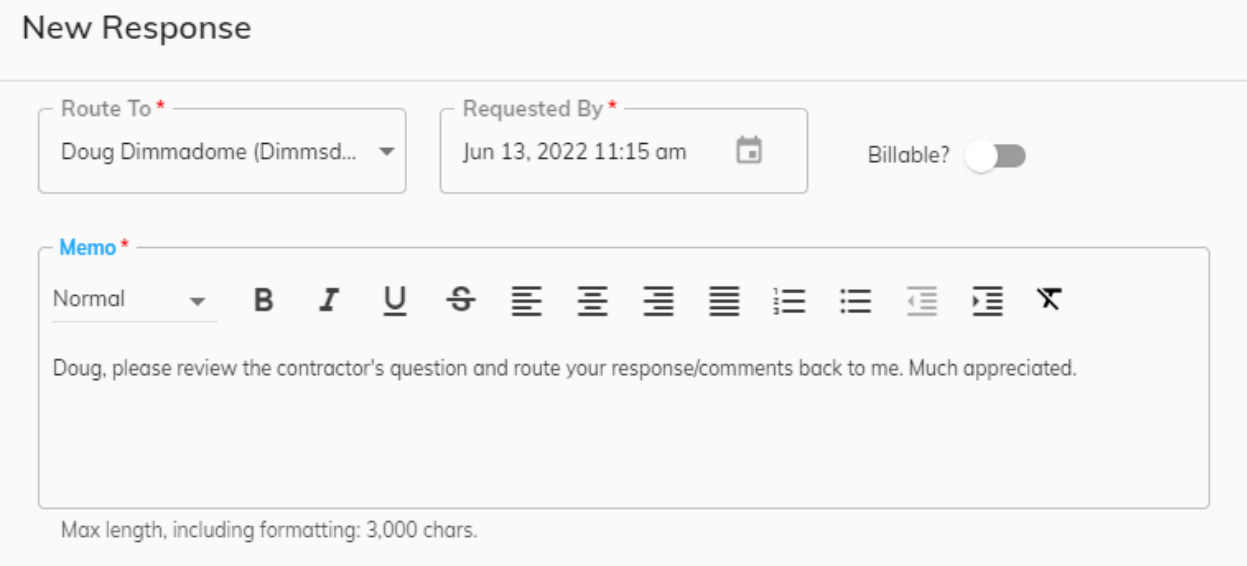
Route An RFI

Routing an RFI will transfer it to a user's My Work page and designate them as the responsible party until they take action on it. It is the primary method for a team to have back-and-forth communication on an RFI without closing it.

If you have the access rights to do so, then the **+ Response** button can be found on the upper right of a pending RFI after navigating to its **Response** tab—use this to route the RFI.



1. Choose which user to Route the RFI to. This will transfer the RFI to their My Work page/Ball-in-Court, send them an email notification, and place them as the Responsibility user until it has been routed again or closed.
2. In the Memo field, provide instructions to the Route user as to why the RFI has been routed to them. Add attachments that you believe will be helpful in the **Attachments** area, and CC anyone else you feel should be aware of your route in the **Select who you want to email**

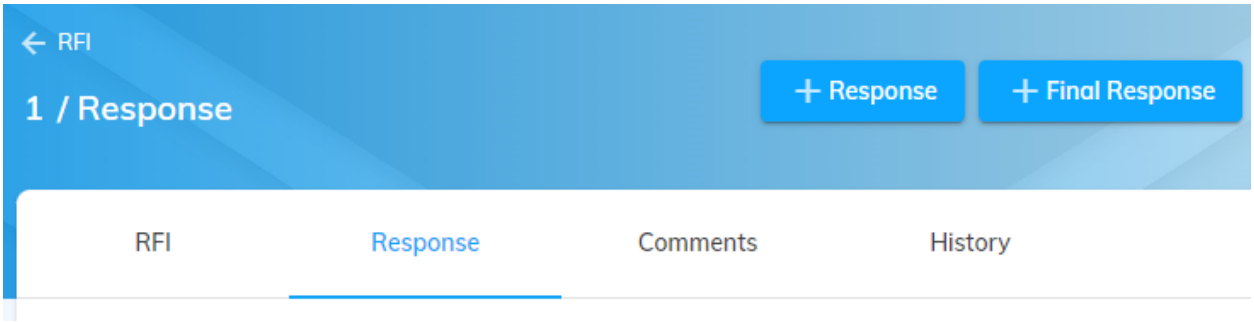


3. Any routing actions taken by users can be reviewed again by accessing the Response tab.

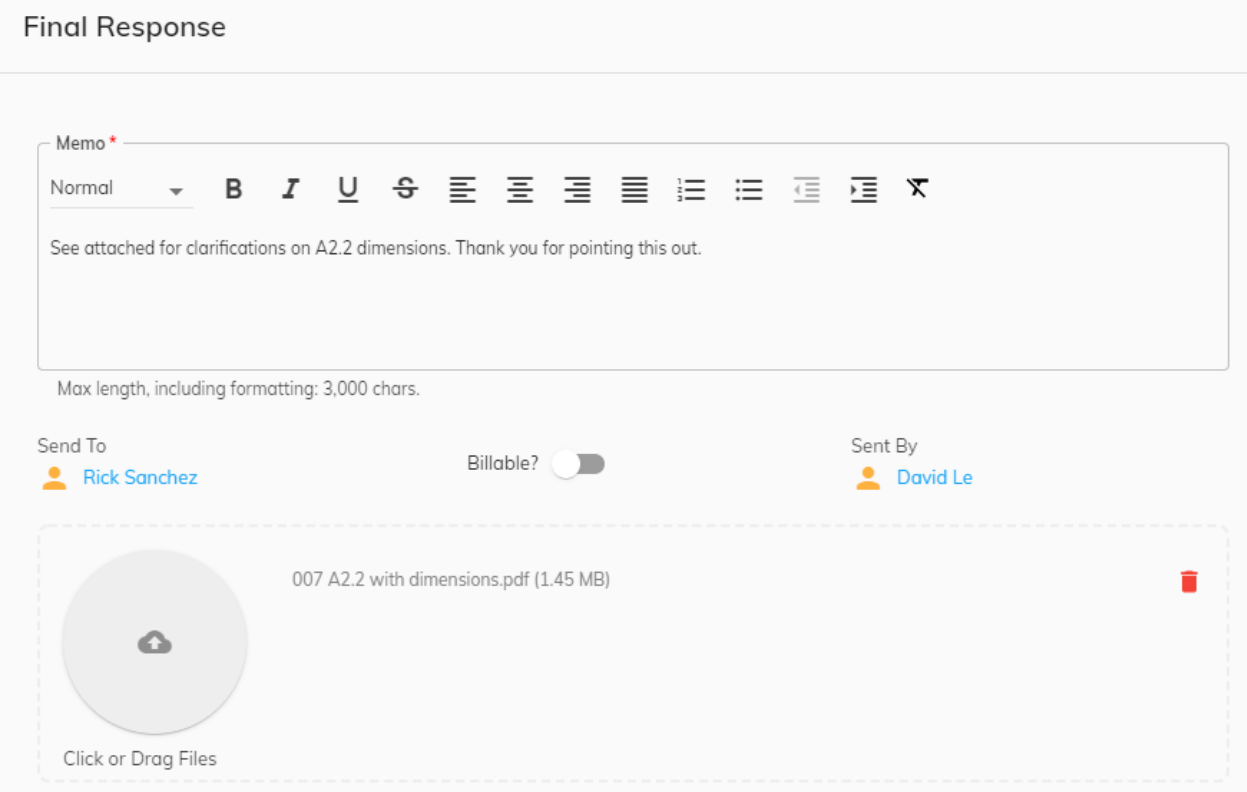
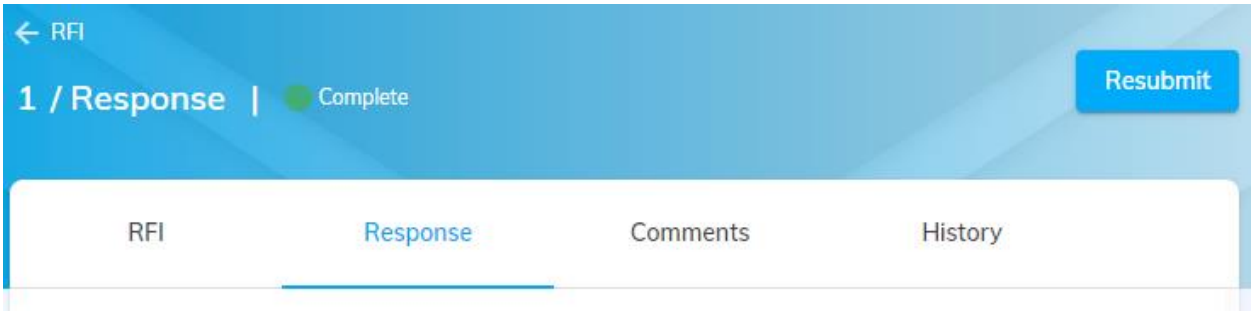
Close An RFI

Closing an RFI provides a final response to the user that had initially submitted it, and changes its status from **Pending** to **Complete**. An RFI will remain pending and eventually become overdue until it has been closed by someone.

If you have the access rights to do so, then the **+ Final Response** button can be found at the on the upper right corner when accessing a pending RFI.



1. In the **Memo** field, provide a final response to the RFI.
2. In the **Attachments** field, attach any files you want to include as part of your final response.
3. Once your final response is complete, click **Save and Finalize** to close the RFI.



4. The final response that was provided to an RFI can be reviewed again by accessing a Complete RFI and navigating to its Response
5. If the creator of the RFI finds the final response unsatisfactory and/or wishes to continue the subject, they can access the completed RFI and use the Resubmit button found in the Response tab. This will create another RFI that is tied directly to it for easier association.