RFI Origination Quick Reference Guide

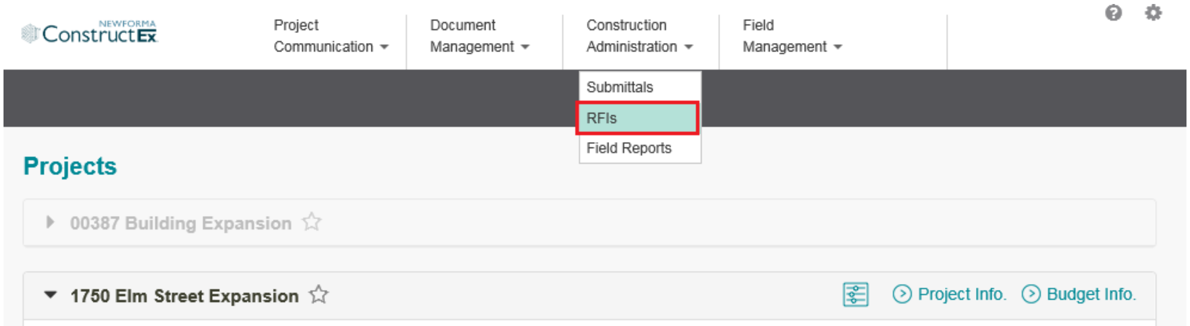
Contractors and subcontractors have the ability to enter RFIs into the Newforma ConstructEx web-based platform in order to submit the documentation to the design team members. To create an RFI, follow the steps below:

Arrive at the RFIs Module

1. Log into ConstructEx to access the **All Projects page**.

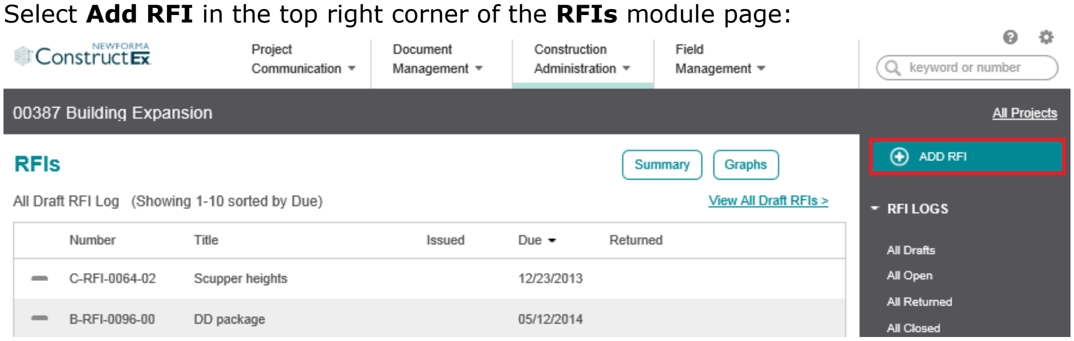
*The first time you log in you will be prompted to complete your profile information. Once your profile is complete you are directed to the **All Projects page**.*

2. Select the desired project by clicking the project name.
3. Expand the **Construction Administration** dropdown menu at the top of the page and select **RFIs** to open the **RFIs** module:

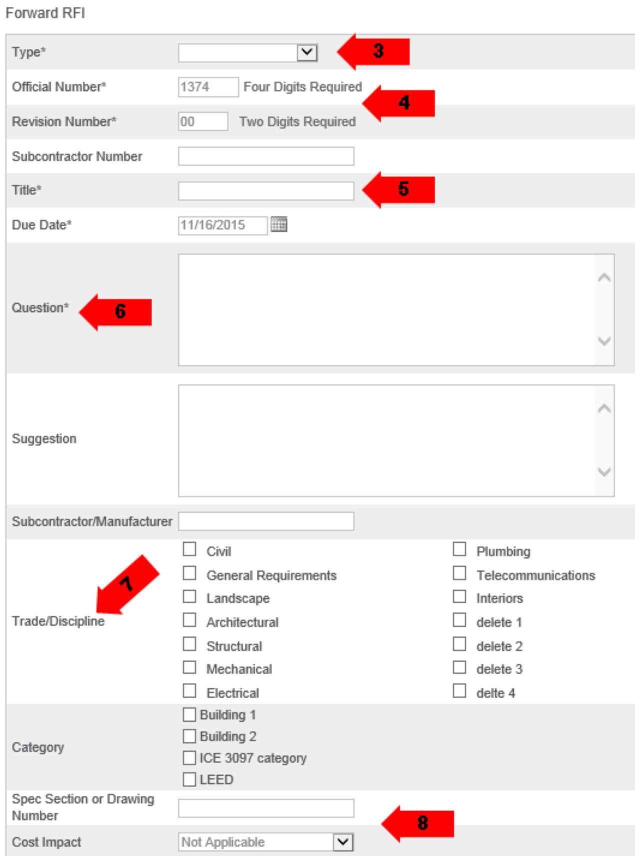


Add an RFI

1. Select **Add RFI** in the top right corner of the **RFIs** module page:



2. Fill out the information on the **Forward RFI page** as indicated below:



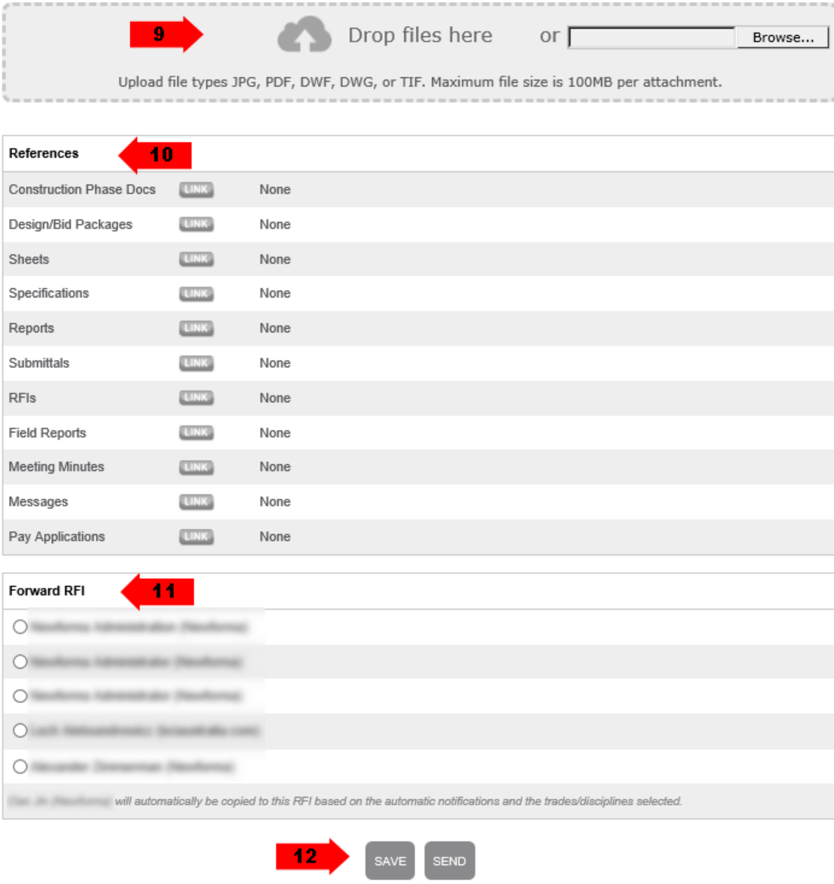
3. If the project has **RFI Types**, select the type from the dropdown. The **Type** field is only visible when the project includes RFI types.

The RFI type has no effect on the RFI number.

4. The system automatically generates the **Official Number** and **Revision Number**. General Contractors can edit these values if needed. Subcontractors can enter their internal RFI tracking numbers in the **Subcontractor Number** field.
5. Enter a **Title**. Best practice is to enter a descriptive title to help the project team understand what issue the RFI addresses. As an example, the title "North Apron Width" is more helpful in understanding the issue than "Concrete".

*The default value for **Due Date** is configured by an administrator.*

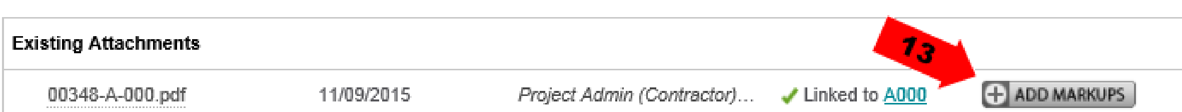
6. Enter the RFI **Question**. If you have a suggestion, enter it in the **Suggestion** field. Enter your **Subcontractor/Manufacturer** information as needed.
7. Select the **Trades/Disciplines** that need to review the RFI. If present, select the **Category(s)**. Categories are generally used for different phase or structures within a larger project.
8. Enter the **Spec Section or Drawing Number** in question. Select the appropriate **Cost Impact** as needed.



9. Drag and drop PDF(s) of the RFI documentation to the **Drop Files Here** section of the page to upload them. Alternately, you can select **Browse** to browse for the files. Some older browsers do not support drag and drop. If configured, the system automatically adds the project's cover sheet to the upload. If the system detects a match in the **Sheet** or **Specification Index**, you are prompted to confirm or dismiss the match.

*In Chrome, **Browse** is replaced by **Choose File**.*

10. Cross reference any related ConstructEx items as needed.
11. Select the RFI recipient in the **Forward RFI** section. Subcontractors are prompted to send the submittal to a member of the contractor team. Contractors are prompted to send the submittal to a member of the design team.
12. Select **Save** if you want to mark up any uploaded documents before sending the RFI or if you want to continue working on the RFI at a later time. Select **Send** if you are ready to send the RFI. Once you send the RFI, the selected user is notified of the RFI and it is now their responsibility to act on it as needed.



13. To add markups to an uploaded document, select **Add Markups** to the right of the document in the **Existing Attachments** section of the **View RFI** page. The first page of the document is the project cover sheet, if applicable. Because it is a web-based tool, please remember to save your markups often. To view a brief video tutorial on using the markup tools, click **here**.

To simply view the document, select the document name.

14. After saving your markups, select **Forward** at the bottom of the page. Continue with steps 11and 12 above to select the recipient and send the RFI.