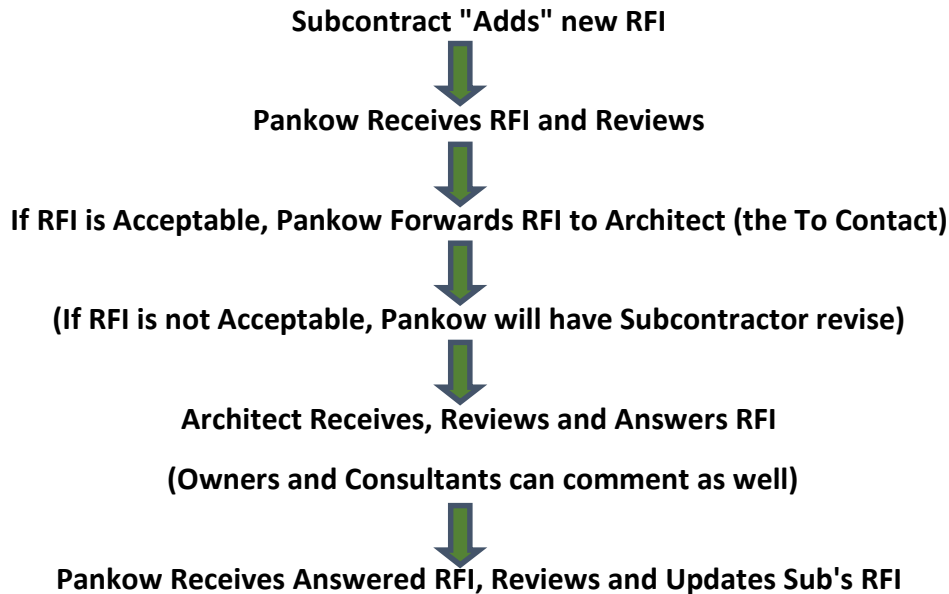


# COLLABORATION

## RFI - ARCHITECT

Using CMiC for Collaboration of RFI's allows the Project Team to view RFI's in real time. Team members depending on security access can add RFI's, Update, add notes, attachments and answer the RFI in the system.

The Collaboration workflow process with CMiC is as follows:



### Viewing RFI in the System:

Once Logged into CMiC, in your tree view different RFI logs will be viewable (depending on access)

RFI No.	Co-Author RFI#	Co-Author Partner	Co-Author Contact	From Partner	From Contact	To Partner	To Contact	Subject	Source	Answered By Partner	Answered By Contact	Status	Date Created	Date Submitted	Date Required	Date Answered	Days to Resolution (+/-)	Attachments
RFI-0012	INTE0034-0001	Interstate Door Sales, Inc. (IDS)	Lisa Walsh	Charles Pankow Builders, Ltd.	Aaron Morris	ELS Architecture & Urban Design	David Petta	Test Sub Collab				OPEN	04-12-2013	04-12-2013	04-19-2013		42	
RFI-0014	INTE0034-0002	Interstate Door Sales, Inc. (IDS)	Lisa Walsh	Charles Pankow Builders, Ltd.	Aaron Morris	ELS Architecture & Urban Design	David Petta	RFI Test from Sub				OPEN	04-18-2013	04-18-2013	04-25-2013		36	
RFI-0010	LJKR0001-0001	L. J. Kruse Company, Inc.	Dave Kruse	Charles Pankow Builders, Ltd.	Aaron Morris	ELS Architecture & Urban Design	David Petta	Testing RFI's for Collab		ELS Architecture & Urban Design	David Petta	OPEN	04-11-2013	04-11-2013	04-10-2013	04-11-2013	1	
RFI-0001				Charles Pankow Builders, Ltd.	Margarett Buschkamp	ELS Architecture & Urban Design	William Gordon	South CHU Wall		ELS Architecture & Urban Design	William Gordon	ACCEPTED	06-01-2012	06-06-2012	06-08-2012	06-08-2012	0	1

- **RFI Log** – View all RFI's submitted by the Pankow to the Architect
  - RFI log will be Bolded with black or blue numbers (Similar to Outlook) for items that are New (Black) or Updated (Blue) indicating you haven't looked at them. Once you view them, this will update automatically - **RFI Log (3, 1)**
- **RFI Outstanding Log** – a log showing all Pankow RFI's that have not received an answer
- **RFI Questions and Answer Log** – a log showing all Pankow RFI's that have been answered

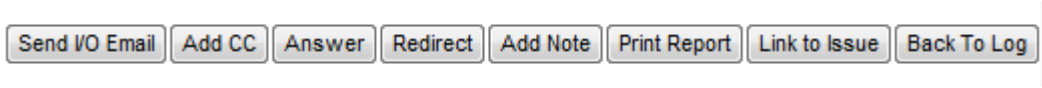
### Viewing RFI directly in CMiC

# COLLABORATION

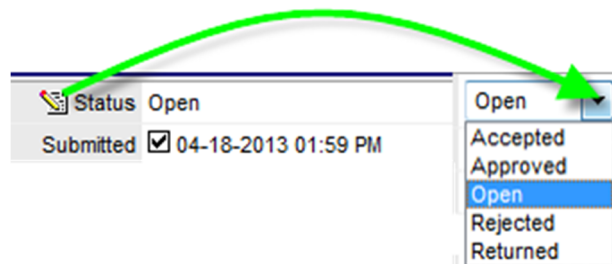
## RFI - ARCHITECT

1. Click on "RFI Log", this will open the log view.
2. Once the log appears you can select any RFI # to view by clicking on the RFI # or Subject.
3. The RFI will open up and the following action buttons will appear (can vary depending on security access).

### RFI Action Buttons – for Open RFI's



- **[Send I/O Email]:** Ability to send Input/Output email that updates the records automatically in CMiC
- **[Add CC]:** User can add CC's to the record
- **[Answer]:** Button only appears for the "To:" contact. Only the "To:" contact can answer the RFI.
- **[Redirect]:** Button only appears for the "To:" Contact and allows the current "To:" contact to select a new "To:" contact (redirect). This new "To:" contact will now be able to answer the RFI.
- **[Add Note]:** Places a note on the RFI record that all user can see below the answer field
- **[Print Report]:** User can print a PDF hard copy of the RFI
- **[Link to Issue]:** Link RFI to an issue – restricted access
- **[Back to Log]:** Takes user back to the log
- **Status Update:** To change the Status of a Submitted RFI, Click on the Note Pad Icon to



edit – Select New Status from LOV

### Answer RFI – "To:" contact

1. Click "Answer" Button – within the RFI Body – The Answer field will open up/expand so user can type in answer (or cut & paste).
  - a. **[Accept Suggestion]:** Button appears – click to accept the suggestion – it will automatically move it to the answer field.
  - b. **Status Update:** Automatically defaults to "Returned"
  - c. **Date Answered:** Automatically fills in once you click "Submit"
  - d. **Attachments tab:** Upload attachments to the RFI record

# COLLABORATION

## RFI - ARCHITECT

Request for Information

Collaboration Manager

RFI Detail

RFI No. RFI-0010 Status Returned

From Aaron Morris Submitted 06-04-2013 03:32 PM

Co-Author Dave Kruse Co-Author RFI No. LJKR0001-0002

Forwarded From LJKR0001-0002

To David Petta Received

CC

Subject RFI Testing Collab again Change #

Date Created 2013-06-04 Date Required 2013-06-11

Source

Question Testing Collab.....

Suggestion

Cost Impact Potentially Cost Amount

Schedule Impact Potentially Days

Answered By David Petta

Date Answered  Accept Suggestion

Answer

Cost Impact  Potentially  Yes  No Cost Amount

Schedule Impact  Potentially  Yes  No Days

Sort Notes

Author: Aaron Morris Date: 06-04-2013 03:32 PM

Forwarded by Aaron Morris to David Petta as RFI-0010

2. Once RFI is answered, and attachments have been uploaded click "Submit" button to return RFI back to Pankow.

### Respond to an RFI Sent Via "Send I/O"

The Pankow project team can send the RFI to the project team by the way of CMiC's "Send I/O" functionality. The RFI will be sent via email to the contacts listed on the RFI. The recipients can then reply to this email with their answer and attachments.

- "To:" contacts reply will go directly into the "Answer" field.
- "cc'd" contacts reply will be added as a "Note" to the RFI record.

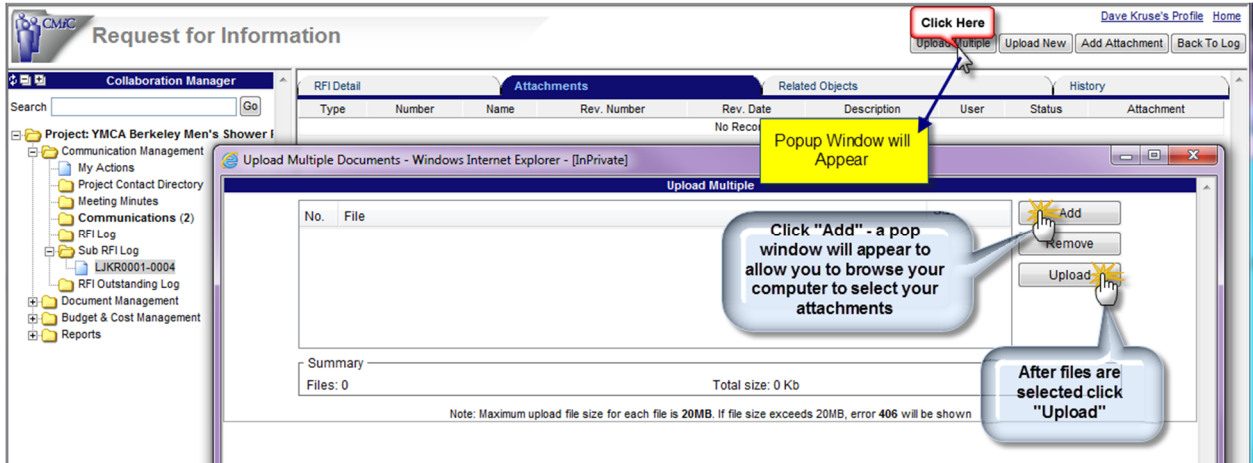
Users can also forward the RFI to others via this option by clicking the button. You can include the notes as well.

### How to attach files

**Multiple Upload:** To upload more than one attachment at a time click "Multiple Upload" a popup window will appear

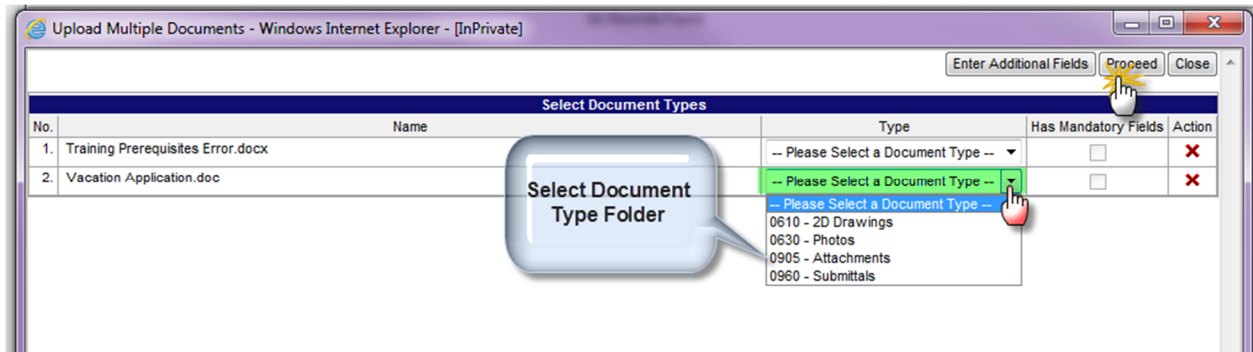
# COLLABORATION

## RFI - ARCHITECT

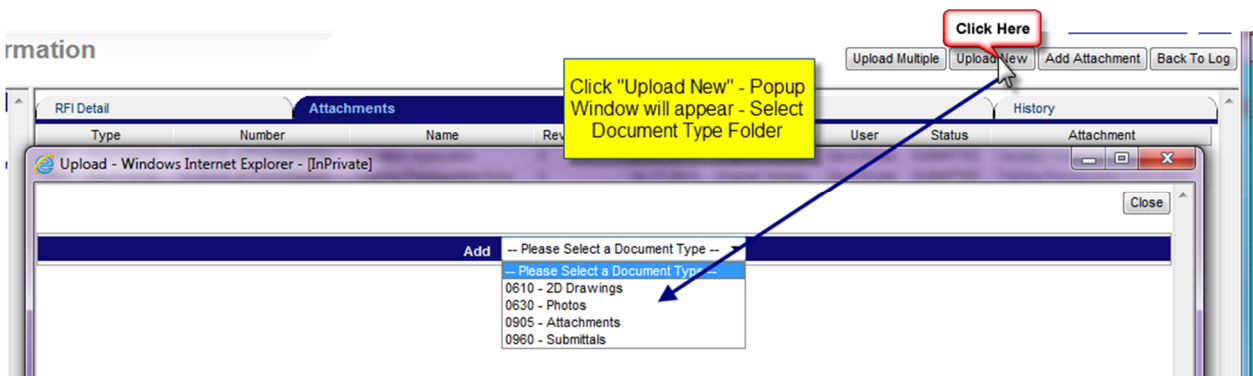


**Note:** The Upload Multiple require Java version 6.41 (or earlier) to be installed on your computer. If you get an error, you can use the "Upload New" or install Java 6.41.

After you click "Upload" the following popup window will appear – Select the Document Type Folder you wish to place the attachment in, then click "Proceed" to complete the upload process



**Upload New:** Upload a single document at a time into the system (does not require Java) click "Upload New" a popup window will appear



After you select a Document Type – it will ask you to browse for your attachment

# COLLABORATION

## RFI - ARCHITECT

Upload Multiple Upload New Add Attachment Back To Log

RFI Detail Attachments Related Objects History

Type	Number	Name	Rev. Number	Rev. Date	Attachment
0905 - Attachments	12-K018_ATTACH000004	Vacation Application	0	04-17-2013	Vacation Application.doc

Upload - Windows Internet Explorer - [InPrivate]

Save Save & New Close

Add 0905 - Attachments

Number 12-K018\_ATTACH00 Title Vacation Application

Document Type RFI

Designer Ref.	Revision Date	Received Date	Status	Description	Attachment
	041713	041713	Open	Original Version	C:\Users\lamorris\Desktop\ Browse

Click "Save" to upload - if you click "Save & New" it will upload current document and reopen this window again

Document Type - Can choose a selection from the LOV if click on up arrow - not required

Click "Browse" to search for your attachment - Once selected the "Title" will automatically fill in with the Name of Document (you can change the Name of the Title if needed)