USING THE RFI DATABASE

Opening the RFI Database

To open the RFI database,

1. Locate the IRISDocs databases in your Lotus Notes workspace.
2. Double-click the **RFI database** icon (*See Figure 1, Right*).

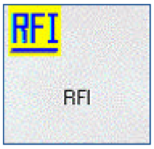

Figure 1: RFI Database Icon

To choose your Navigation view in the RFI Database Welcome Screen,

1. Click the button on your tool bar.
2. Select **1. I want to see the RFI Navigator** in the dialog box that appears (*See Figure 2, Right*).
3. Click **OK**.

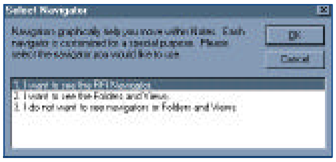

Figure 2: Select Navigator Menu

Tip ***Before using the RFI Database, open and complete the Project Description, Project Contacts, and Specifications databases.***

Creating an RFI Document and Transmittal

To create an RFI Document,

1. Click the button at the bottom of your navigation menu (*See Figure 4, Far Right*).
2. Complete all fields in the **Request for Information**, **Transmitted Information,** and **Supplemental Information** tables (*See Figure 3, Below*).

Tip ***After you complete all fields, save to ensure future actions work properly.***

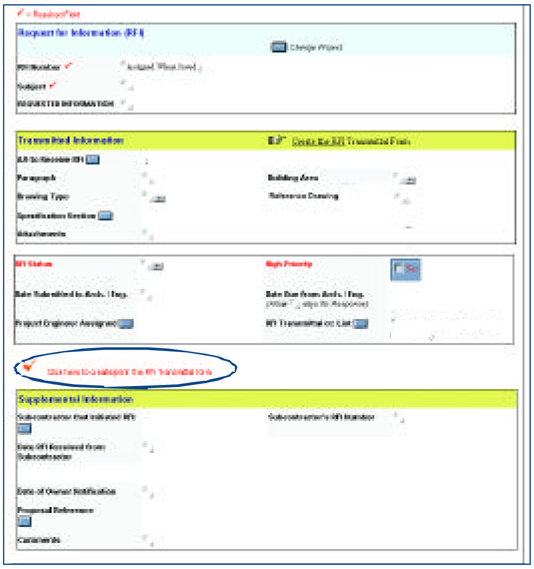

Figure 3: Transmittal Information Tables

To create an RFI Transmittal,

1. Create the RFI Transmittal form by clicking above the **Supplemental Information** table (*See Figure 4, Below*).
2. Select an option in the **Format of Transmittal Letter** dialog box that appears, and click **OK**.
3. Select an option in the **Select RFI Status** dialog box that appears, and click **OK** to view the transmittal form.
4. Click and , or click to leave the RFI document.

Tip ***The RFI Status will automatically update after you create an RFI Transmittal.***

Navigating the RFI Database

Figure 4: Navigation Menu

Viewing RFIs

You may view RFIs by:

- **Number** - Sorted by RFI number.
- **Date Due from A/E** - Sorted by the date the RFI is due from the architect.
- **Author** - Sorted by the name listed in the **Project Engineer Assigned** field.
- **Status** - Sorted by the **Status** field.
- **Building Area** - Sorted by the **Building Area** field.
- **Sub's RFI Number** - Sorted by each subcontractor's name, with the RFI numbers listed below.
- **Spec Section** - Sorted by the **Specification Section** field.
- **Drawing Type** - Sorted by the **Drawing Type** field.
- **Status by Month** - Sorted by year and then by month.
- **Aged Status** - Sorted by status—from **A. Open** to **Y. Canceled**—and then by how long the RFI has had that status

Viewing Letters

You may view letters by:

- **Status** - Sorted by the **Letter of Affect Status** field.
- **Subcontractor** - Sorted by the vendor/ subcontractor.
- **Delinquent Vendor** - Sorted by vendors who owe a response to your affect letter.

Updating an RFI with the A/E's Response

To update an RFI with the A/E's response,

1. Select the RFI document you wish to update.
2. Click Edit to open the document in edit mode.
3. Scroll down to the **RFI Response** table (*See Figure 5, Below*).

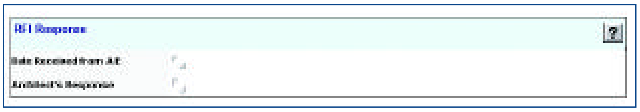

Figure 5: RFI Response Table

4. Enter the **Date Received from A/E** and **Architect's Response** fields in the **RFI Response** table.
5. Click Save, and continue by creating an Affect Letter, if needed, or click Close to leave the RFI document.

Creating an Affect or a Distribution Letter

To create an Affect or Distribution Letter,

1. Open the RFI document you wish to update in edit mode.
2. Scroll down to the **Subcontractor RFI Distribution** table (*See Figure 6, Below*).

Figure 6: Subcontractor RFI Distribution Table

3. Verify the **Subcontractor RFI Distribution** table is complete and the **Distribution List** includes all subcontractors who should receive a letter.
4. Click Click here to create/print the Subcontractor's Affect Letter (*See Figure 6, Above*).
5. Click **OK** to select **Create the Affect Letter(s)** or **Create the Distribution Letter** in the **Select Action to Take** dialog box that appears.
6. Select a status, and click **OK** in the **Select RFI Status** dialog box that appears.
7. Choose **YES** or **NO** to print.
8. Click Save and Close.

Updating the Status and Date for Multiple Affect Letters

To change the status and date for multiple Affect Letters,

1. Select the RFI Affect Letter(s) you wish to update.

Tip

Click the name of the RFI document to expand a list of Affect Letters beneath the name if you cannot see any Affect Letters.

2. Click Do Tasks.
3. Select **Update the statuses of the selected Affect Letters** in the **Perform Task** dialog box that appears (*See Figure 7, Right*).

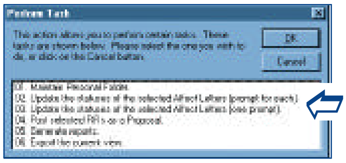

Figure 7: Perform Task Dialog Box

4. Enter the new date or status, and click **OK**.

Posting Multiple RFIs as Proposals

To post multiple RFIs as proposals,

1. Select the RFI documents you wish to post as a proposal.
2. Click Do Tasks.
3. Select **Post selected RFIs as a Proposal** from the **Perform Task** dialog box that appears (*See Figure 7, Above*), and click **OK**.
4. Select a status from the **Select New RFI Status** dialog box that appears (*See Figure 8, Right*), and click **OK**.

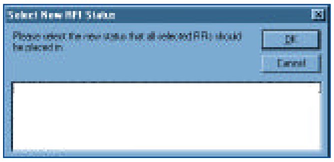

Figure 8: Select New RFI Status Dialog Box

5. Continue by creating a new proposal, or click Save and Close.

Tip

Before proceeding to Proposals and Change Orders, update cost codes and vendor contracts.