

RFI's

- [Creating and responding to an RFI](#)

Creating and responding to an RFI

This page contains step by step instructions for how to create and respond to RFI's.

Roles:

UF PD&C Project Manager: **RFI Manager- for control**

Construction Manager: **RFI Manager**

Architect/Engineer: **RFI Reviewer**

Create an RFI (Web)

1. **Click the Create RFI** button (top left corner).
2. **Select Status**
 - Example: *Open for Manager* (used by RFI Managers/Admins to assign directly to another RFI Manager).
3. **Enter RFI Number**
 - Default is auto-incremented from the last RFI.
 - You can edit it as long as it's unique.
4. **Enter Title**
5. **Select RFI Type- Default for now (will create more as time goes on)**
6. **Choose Ball in Court**
 - Select up to 10 reviewers.
7. **Select Co-Reviewers**
 - **These team members are not responsible for providing an official response., but they will be notified of the RFI & can add comments in the activity log.**
8. **Set a due date**
9. **Identify the location (Should match project location)**
10. **Type in question- What's being asked in the RFI**
 1. Default Roles include:
 - UF PD&C Project Manager: **RFI Manager**.
 - Construction Manager: **RFI Manager**
 - Architect/Engineer: **RFI Reviewer**

1. **Suggest an answer-**
 2. **Attach References**
 - Choose from: Files, Sheets, Photos, Submittals, Issues, Schedule, Assets, PCO, Forms, or other RFIs.
 - Upload files from your device.
 3. **Toggle whether or not there will be a Cost Impact, or a Schedule Impact**
 4. **Identify the discipline this RFI Pertains to**
 5. **Identify Watchers-**
 - **These team members who are notified of this RFI, but are not expected to contribute of this response.**
 6. **Click Create**
-

Responding to An RFI

1. **Response:** **RFI Reviewers** provide their responses, which are tracked separately. **Reviewers** can edit their responses while the RFI is in **Open In review** status and they are still the **Ball in court**. Manager can also indicate if they should be skipped.
 2. **Official Response:** The Manager reviews the responses, chooses an official response from a list, adds comments and attachments if enabled, and changes the status to **Answered**.
 3. **Closure:** Post-response, the manager sets the status to **Closed**, and distributes the RFI to all project members. Closed RFIs can be saved to files.
-

Using the AI-Powered Assistant (Web)

The AI assistant helps auto-fill RFI fields based on a descriptive prompt.

How It Works:

- Enter a prompt describing the RFI.
- AI will populate supported fields (highlighted for review).
- You can edit any field—editing removes the highlight.

Supported Fields:

- Title
- Question
- Category
- Discipline
- Cost Impact
- Schedule Impact

- Priority
 - Location Details
- More fields coming soon.*

Notes:

- AI won't override default values.
- You can **regenerate** the response to get new suggestions.
- All AI-generated RFIs are logged in the **Activity Log**.

Tips for Better Prompts:

- Be specific and detailed.
 - Use complete sentences.
 - Avoid vague phrasing.
-
-

Editing an RFI

To Change RFI Number:

1. Open the RFI item.
2. Edit the number field (top right corner).

To Edit RFI Details:

1. Open the RFI item.
2. Adjust any desired fields.