
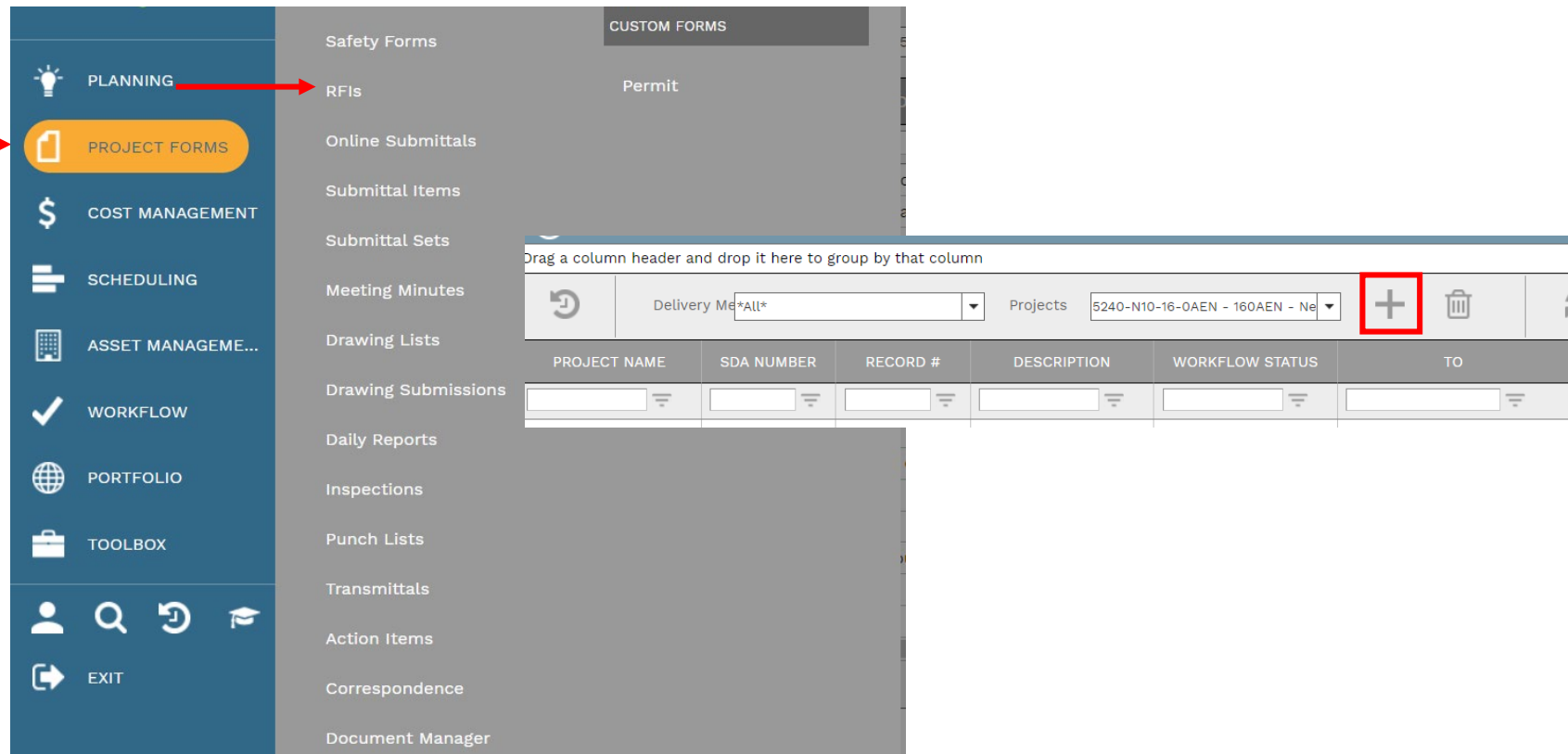


# OPEN THE MODULE

- Choose **Project Forms** -> **RFIs**
- This displays the **Manager View** for the module and shows all records.
- To search for a document to modify, use the columns to filter for the data you need. For example, use the Record # column to search for a document.
- To add a new document, click the **Add** button 



The screenshot displays the PMWeb interface. On the left is a navigation menu with categories: PLANNING, PROJECT FORMS (highlighted in orange), COST MANAGEMENT, SCHEDULING, ASSET MANAGEMEN..., WORKFLOW, PORTFOLIO, and TOOLBOX. Below these are icons for user, search, refresh, and help, followed by an EXIT button. The main content area shows a list of modules under 'CUSTOM FORMS': Safety Forms, RFIs, Permit, Online Submittals, Submittal Items, Submittal Sets, Meeting Minutes, Drawing Lists, Drawing Submissions, Daily Reports, Inspections, Punch Lists, Transmittals, Action Items, Correspondence, and Document Manager. A red arrow points from the 'PROJECT FORMS' menu item to the 'RFIs' module. Below the module list, a table is visible with columns: PROJECT NAME, SDA NUMBER, RECORD #, DESCRIPTION, WORKFLOW STATUS, and TO. Above the table is a search bar with 'Delivery Me\*All\*' and a 'Projects' dropdown set to '5240-N10-16-OAEN - 160AEN - Ne'. A red box highlights the '+' button in the table's toolbar.



# ADD A NEW RECORD

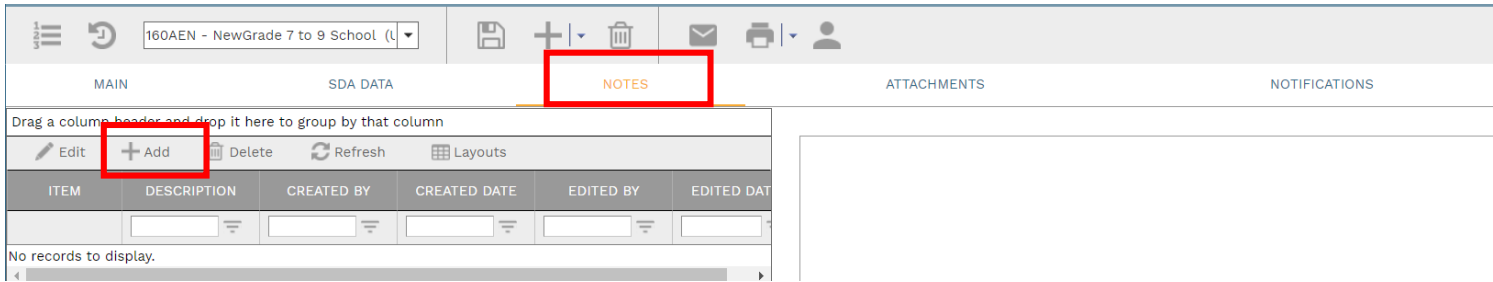
- Enter all relevant information in the **document**. Any field marked with an asterisk is a required field. Enter all relevant information in the **Details** section for the **Question** and **Proposed Solution**. The **Answer** section will be completed after review.
- If the Category field is unknown at the time of creation, it can be left blank. The SDA Project Officer will complete before submitting to workflow.
- Click the **Save** button when finished.

The screenshot shows a software interface for adding a new record. The top toolbar contains several icons, with the 'Save' icon (a floppy disk) highlighted by a red box. Below the toolbar, the interface is divided into several sections:

- Project:** A list of fields on the left with corresponding input fields on the right. Fields include Project, RFI #\*, Description, Contract #, Status (set to 'Draft'), RFI Date, Category, From, To, Trade, Sub RFI #, Priority, Task, Affects Scope of Work, Affects Cost, Affects Schedule, Change Event, Date Required, Date Answered, Linked Records, and Transmittals.
- QUESTION:** A rich text editor with a toolbar (Bold, Italic, Underline, Strikethrough, Bulleted List, Numbered List, Indent, Outdent, Text Color, Background Color, Link, Unlink, Image, Table) and a 'Design' button.
- PROPOSED SOLUTION:** A rich text editor with the same toolbar and 'Design' button as the Question section.
- ANSWER:** A rich text editor with the same toolbar and 'Design' button as the Question section.
- USER DEFINED FIELDS:** A section with a label 'Contractors RFI Number' and an empty input field.

## ADD ADDITIONAL NOTES

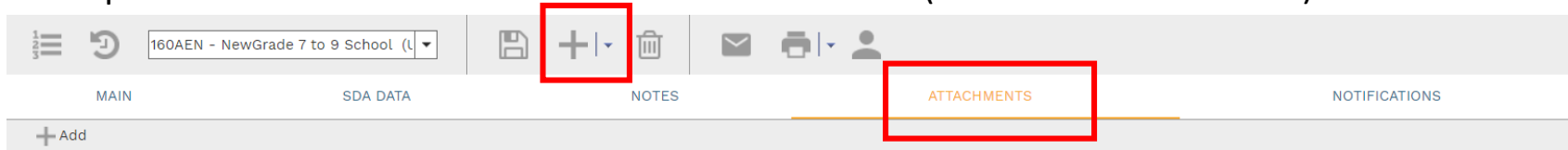
- Click **Add** on the **Notes tab** to add additional notes as needed. Click the **Save** button after each entry.



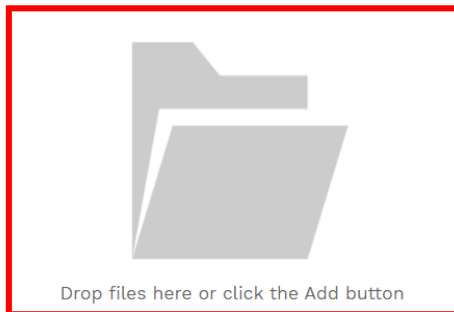
The screenshot shows a software interface with a top navigation bar containing icons for home, refresh, search, save, add, delete, email, print, and user. Below the navigation bar are tabs for MAIN, SDA DATA, NOTES, ATTACHMENTS, and NOTIFICATIONS. The 'NOTES' tab is selected and highlighted with a red box. Below the tabs is a table with a toolbar containing 'Edit', '+ Add', 'Delete', 'Refresh', and 'Layouts'. The '+ Add' button is highlighted with a red box. The table has columns for ITEM, DESCRIPTION, CREATED BY, CREATED DATE, EDITED BY, and EDITED DATE. Below the table, it says 'No records to display.'

## ADD ATTACHMENTS

- Drag and drop files on the **Attachments tab** to add attachments (or click the Add button). Click the **Save** button after each entry.



The screenshot shows the same software interface as above, but with the 'ATTACHMENTS' tab selected and highlighted with a red box. The '+ Add' button in the table toolbar is also highlighted with a red box.



# SUBMIT TO WORKFLOW

- Click the **Workflow** tab to start the workflow process. Enter the email information and any application comments, then click the **Submit** button to start the workflow approval process. You can return to this section to review the progress of the approvals.

The screenshot displays the PMWeb application interface for submitting a document to a workflow. At the top, a navigation bar includes a menu icon, a refresh icon, a dropdown menu with the text "160AEN - NewGrade 7 to 9 School (U)", and icons for save, add, delete, email, print, lightning bolt, and user profile. A "SUBMIT" button is located on the right side of this bar. Below the navigation bar, a horizontal menu contains tabs for "MAIN", "SDA DATA", "NOTES", "ATTACHMENTS (4)", and "WORKFLOW". The "WORKFLOW" tab is highlighted with a red box. On the left side, a sidebar contains a "SUBMIT" button (highlighted with a red box), "BUSINESS PROCESS", and "WORKFLOW LOG". The main content area is divided into two sections: "ACTIONS" and "EMAIL PREVIEW". The "ACTIONS" section contains "SAVE" and "CANCEL" buttons, with the "SAVE" button highlighted by a red box. The "EMAIL PREVIEW" section shows the subject line "PMWeb Approval Request: RFIs 00001 -- 966 - 160AEN - NewGrade 7 to 9 School (Union City) - Utility Disconn", a large text area for "Comments", and an "Email Body" section. The email body contains the text "A document has been Submitted for approval by Jennifer Irizarry." followed by "Workflow Document Information:" and a list of details: "- Document type: RFIs", "- RFI #: 00001 -- 966", "- Project Name: 160AEN - NewGrade 7 to 9 School (Union City)", and "- Contract: HU-0029-N01". Below the email body is an "Add CC" field and a green button labeled "DROP FILES HERE OR CLICK TO ADD".