

Power & Water Customer Collaboration Documentum:

Request for Information (RFI)



imagination at work

Module Objectives:

1. Overview of Request For Information (RFI)
2. Member Roles for RFIs
3. Create an RFI
4. Other Creator Actions
5. Change Routing
6. Reply to an RFI
7. Other Resolver Actions
8. View and Print an RFI
9. Role Action Matrix

RFI Overview

- A Request For Information (RFI) form is created by internal/external parties to ask 'official' questions
- RFI forms are routed for reply and completion
- When completed, RFI comments and responses are part of the project record
- RFI's are monitored by GE for timely response and accuracy of answers

Name/Subject	Status	RFI Due Date	RFI Resolver	Created	Creator Name	RFI Reviewer
Testing Reassign RFI	Closed	2/25/2011 7:33 AM		1/27/2011 7:32 AM		
Test Case 01272011	Closed	2/3/2011 7:13 AM		1/27/2011 7:20 AM		
Test Case 01272011	Closed	2/17/2011 7:13 AM		1/27/2011 7:09 AM		
Test_012011	Closed	2/10/2011 3:03 PM		1/20/2011 2:56 PM		
Clarification on Drawing 222rrr5...	Open	1/24/2011 9:43 AM		1/18/2011 9:39 AM		
Test Janice	Open	2/28/2011 11:05 AM		1/17/2011 11:01 AM		
Test	Closed	1/10/2011 5:57 AM		12/20/2010 5:49 AM		

RFI is a 'node' on the Navigation Tree to left of workspace - click it to open the RFI Folder. Take all action on RFIs here or from Inbox.

RFI Overview

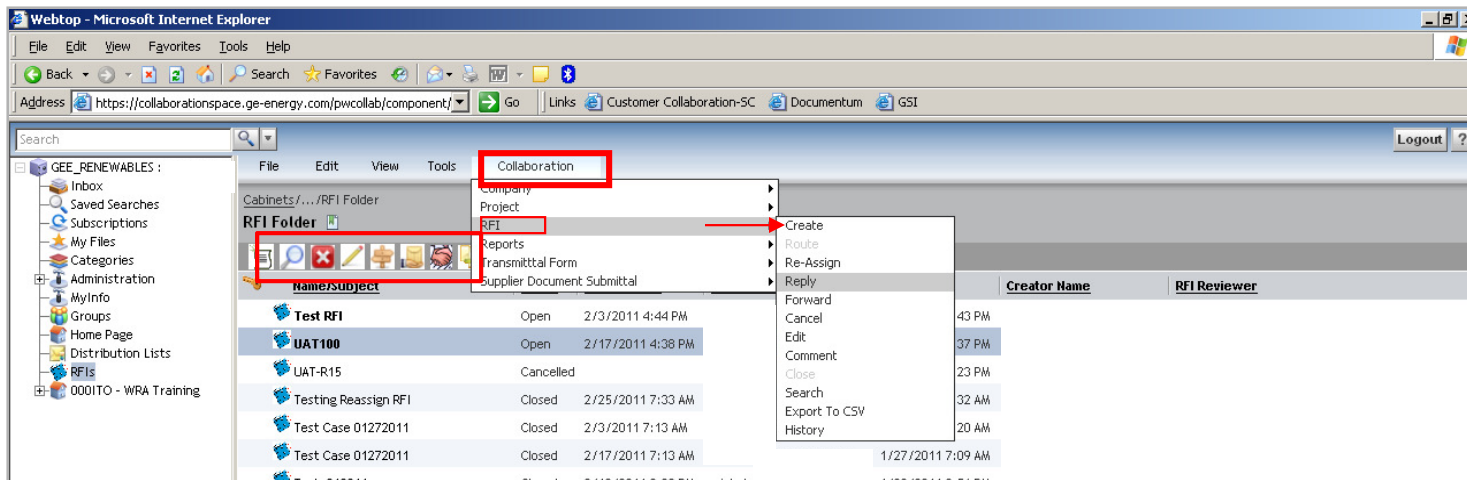
- RFIs in the RFI node belong to project currently selected (in the example below, the RFIs belong to project “000ITO – WRA Training”)
- GE team: All RFIs are listed and can be viewed, including RFIs in which there is no direct role; GE team can only act on RFIs in which they have a role
- External Parties: Only can view and act on RFIs they created or in which have a role

Name/Subject	Status	RFI Due Date	RFI Resolver	Created	Creator Name	RFI Reviewer
Test RFI	Open	2/3/2011 4:44 PM		1/27/2011 4:43 PM		
UAT100	Open	2/17/2011 4:38 PM		1/27/2011 4:37 PM		
UAT-R15	Cancelled			1/27/2011 4:23 PM		
Testing Reassign RFI	Closed	2/25/2011 7:33 AM		1/27/2011 7:32 AM		
Test Case 01272011	Closed	2/3/2011 7:13 AM		1/27/2011 7:20 AM		
Test Case 01272011	Closed	2/17/2011 7:13 AM		1/27/2011 7:09 AM		
Test_012011	Closed	2/10/2011 3:03 PM		1/20/2011 2:56 PM		
Clarification on Drawing 222rrr5...	Open	1/24/2011 9:43 AM		1/18/2011 9:39 AM		

*If the RFI name is bold = RFI is “Open” and you have a role

RFI User Roles

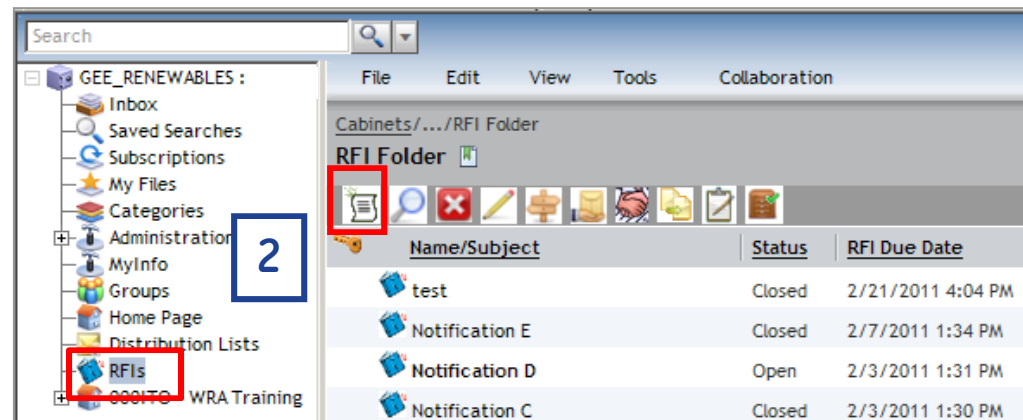
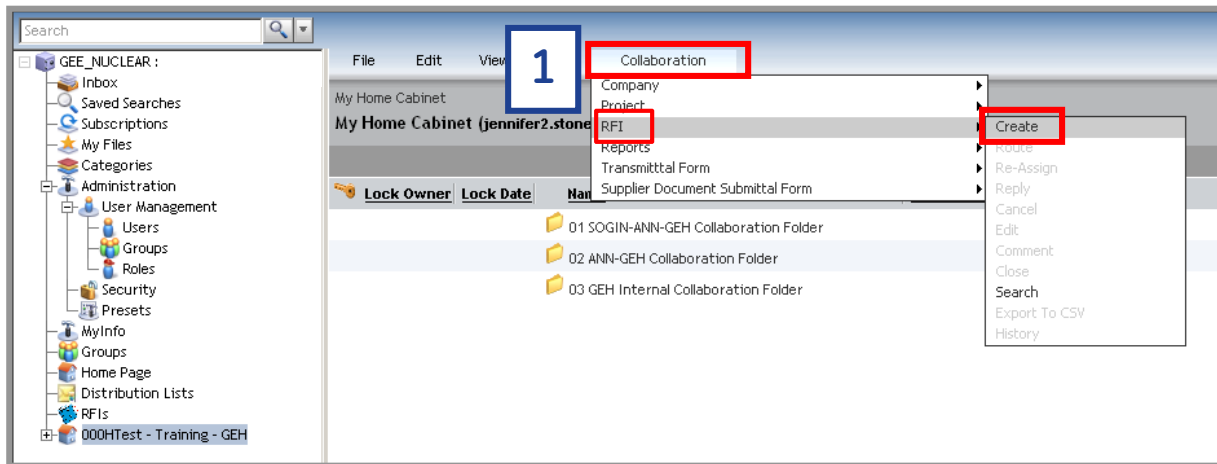
- Creator – always has access to RFI, recipient of final Reply/Completion
- Resolver – the single user responsible for providing Creator with Reply/Completion
- Reviewer – responsible for providing information to Resolver (comments and /or attachments)
- Information – no responsibility, read-only access to RFI
- Forwarded RFI Recipient – responsible for providing information to Resolver (comments and /or attachments)



To Take Action: Select RFI - Right Click for Menu
or Choose Icons for Commands
or Click on "Collaboration" Menu Option, then "RFI"

Create an RFI

1. Click "Collaboration" from menu, select "RFI", then "Create"
2. From RFI node, click "Create" icon



Create an RFI

Create RFI -- Webpage Dialog

Create RFI

Name/Subject * REQUIRED Co-Author & Company

Reference # RFI Created On Behalf of External Party

For all items requiring a response in less than 3 days, please enter a Critical RFI and communicate directly with your GE Contact person

Response Priority * REQUIRED

Reason For Request

Action Requested

Information Requested * REQUIRED

Proposed Solution

Attach Files Link Files

Save As Draft Route Cancel

3

3. Complete mandatory fields (optional fields as needed)

RFI Form Fields:

Co-Author & Company: used to indicate who is true 'owner' of request, if RFI is being completed on someone's behalf

Reference #: used if organization has specific numbering requirements

RFI Created on Behalf...: used to indicate if is created on behalf of an external party

Response Priority: criticality ranking for RFI.

Create an RFI

Create RFI

Name/Subject * REQUIRED Co-Author & Company

Reference # RFI Created On Behalf of External Party

For all items requiring a response in less than 3 days, please enter a Critical RFI and communicate directly with your GE Contact person

Response Priority * REQUIRED

Reason For Request

Action Requested

Information Requested * REQUIRED

Proposed Solution

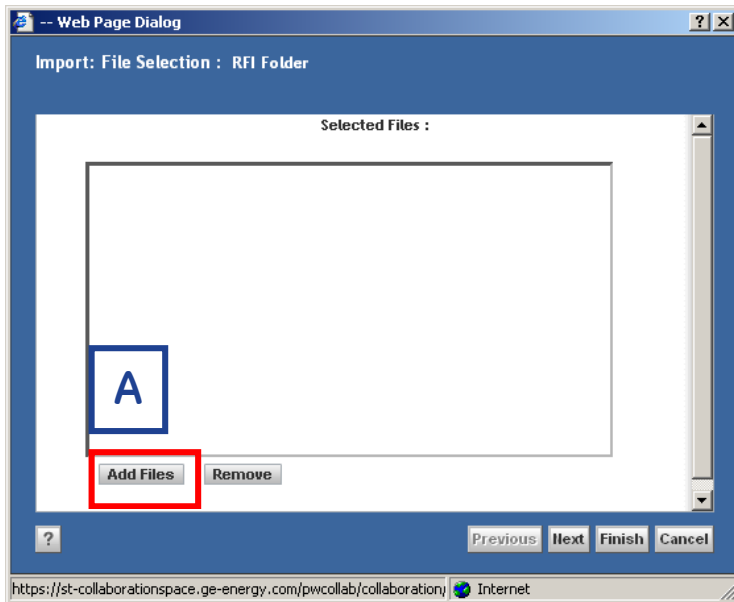
4

4. “Attach Files” to RFI from local drive and/or “Link Files” from project folders.

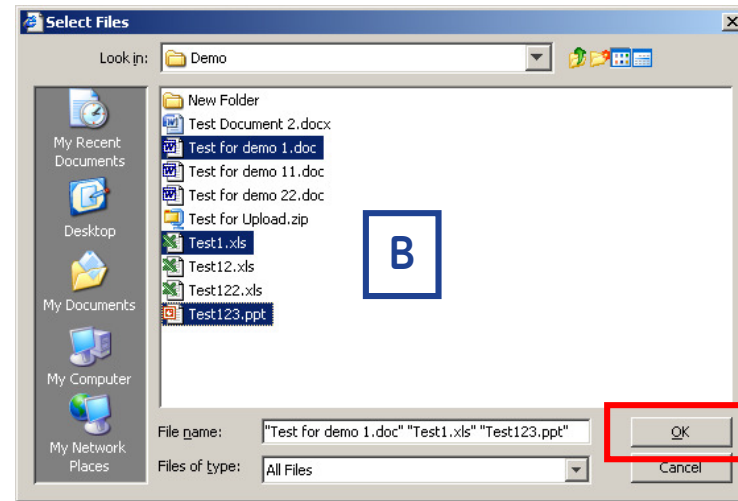
* “Attached” files will reside only in the RFI. “Linked” files from the project folders will retain the security levels of their source folder even when attached to the RFI.

Create an RFI

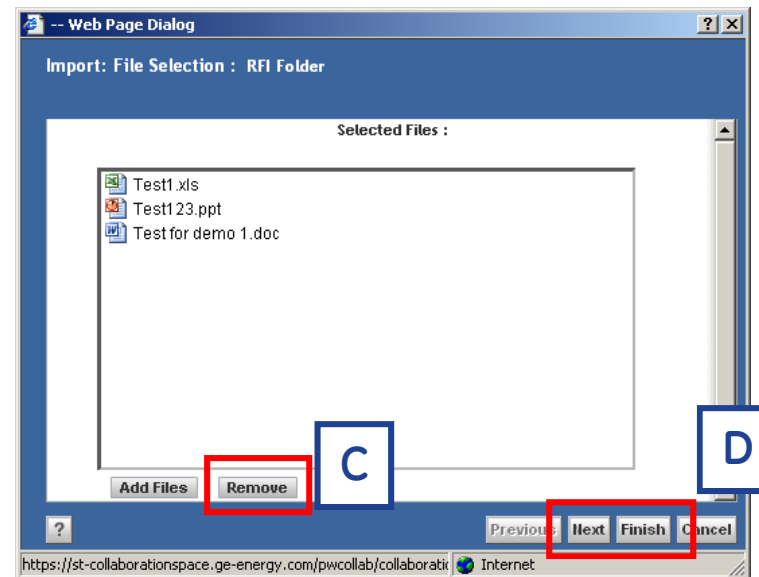
Attach Files to RFI Form



A. Click "Add Files" to navigate to local drive



B. Select file(s) and click "OK"



C. Review files, select file to "Remove" as needed
D. Click "Next" or "Finish" to continue

Create an RFI

Attach Files to RFI Form

The data below might be a carry over from the previous document (if any). Please check before hitting 'Next/Finish' button.

File: C:\Documents and Settings\ \Desktop\Desktop as of 052010
Demo\Test1.xls

Name: Test1.xls *

Type: GE Document (ge_document): Other Documents (Document Type

Format: MS Excel Worksheet 8.0-2003 (Windows)

Title: *

Reference:

Previous Next Finish Cancel

https://st-collaborationspace.ge-energy.com/pwcollab/collaborati Internet

File Type:

Other Document: typically for non-version controlled files, non drawings/specifications with minimal attributes (file meta-data) required

- Change "Name" if desired
- Select "Type" to define attribute fields appropriate to file
- Complete mandatory (*) fields... optional fields as needed
- Click "Next" to add attributes on next attachment or "Finish" if final attachment

The data below might be a carry over from the previous document (if any). Please check before hitting 'Next/Finish' button.

File: C:\Documents and Settings\ \Desktop\Desktop as of 052010
Demo\Test1.xls

Name: Test1.xls *

Type: GE Drawing Document (ge_drawing_document): D Document Type Help

Format: MS Excel Worksheet 8.0-2003 (Windows)

Title: *

Drawing Number: *

Sheet Number: *

MLI / MDL Number: *

Document Status Code: *

Revision Level: *

Revision Date: Date 12:00:00 AM *

Revision Notes: *

Previous Next Finish Cancel

https://st-collaborationspace.ge-energy.com/pwcollab/webcomponent/library/center Internet

File Type:

Drawing Document: used for GE drawings or specifications that ARE version controlled.

More attributes (file meta-data) are required and associated with file

Create an RFI

Link Files to RFI Form

*Use "Cookie Crumb" link at top to navigate back through folder structure

The image displays three sequential screenshots of a web application interface for creating an RFI (Request for Information).

Screenshot 1: Create RFI -- Webpage Dialog
This is the main form for creating an RFI. It includes fields for Name/Subject, Reference #, Response Priority (set to Critical), Reason For Request, and Action Requested. There are also text areas for Information Requested and Proposed Solution. The 'Link Files' button is highlighted with a red box and labeled 'A'.

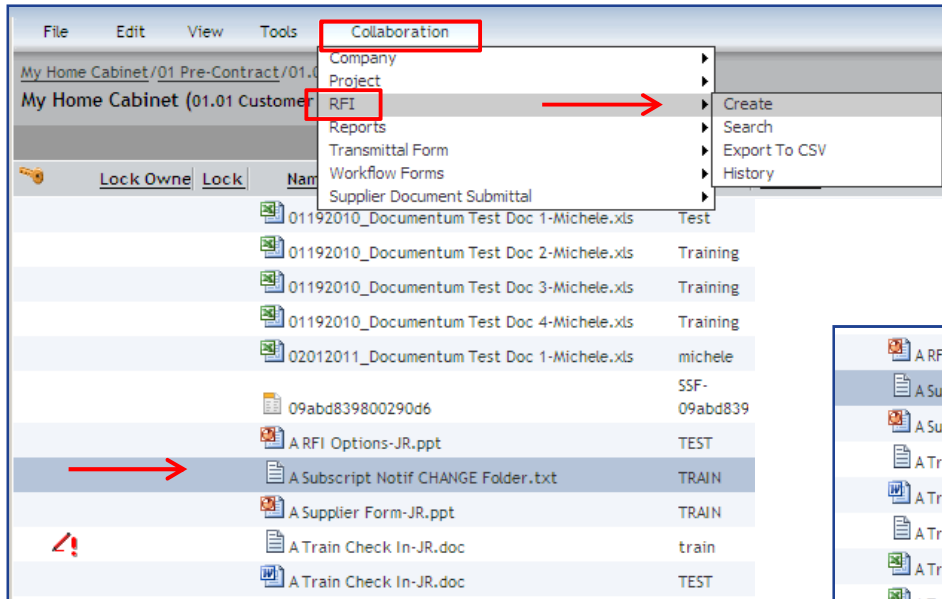
Screenshot 2: Choose a document -- Webpage Dialog
This dialog shows a folder structure for selection. The folder '01 Pre-Contract' is selected and highlighted with a blue box and labeled 'B'.

Screenshot 3: GEE_THERMAL_EU/000ExTHUS - Training Project/ 01 Pre-Contract
This dialog shows a list of files within the selected folder. The file '000ExTHUS-DR-00103 Michel...' is selected and highlighted with a blue box and labeled 'C'. The 'OK' button is highlighted with a red box.

- A. Select "Link Files" to choose files from project folders
- B. Double-click folders to 'drill down' to files for linking
- C. Select file(s), click "OK" to continue

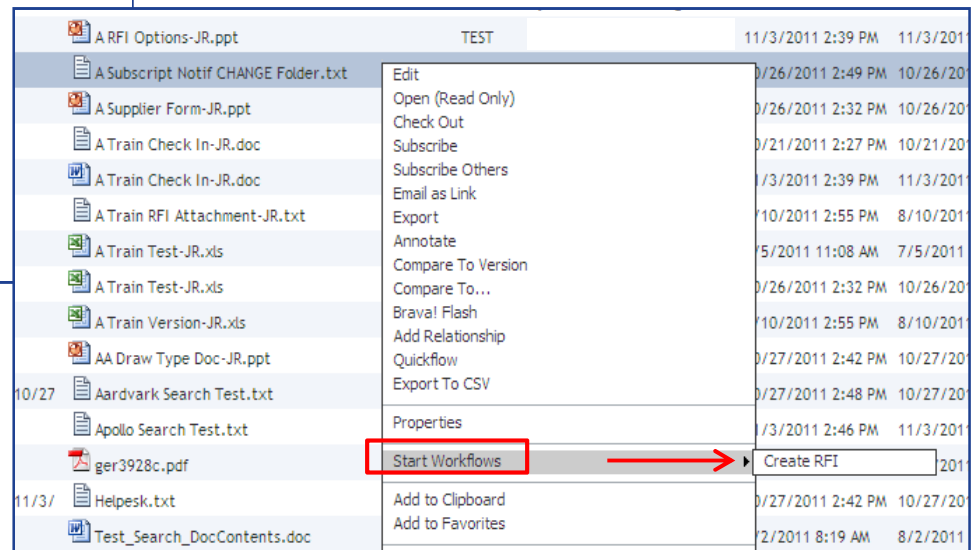
Create an RFI

Link Files to RFI Form



You may also highlight the desired file(s) and then choose “Collaboration”, “RFI”, “Create” and the form will open with the selected files attached.

Or, highlight the desired file(s), right click and select “Start Workflows”, “Create RFI”. The form will open with the selected files attached.



Create an RFI

Complete RFI Form

5. Review attached files and 'uncheck' to remove as needed

*Attached files can only be removed at time of attachment - files cannot be removed after RFI has been routed

6. Click "Save as Draft" to complete RFI later; click "Route" to send RFI, or click "Cancel" to discard RFI form

Create RFI -- Webpage Dialog

Create RFI

Contact person

Response Priority: Critical REQUIRED

Reason For Request: Alternative Suggestion

Action Requested: Approval

Information Requested: Provide more clarity around page 2 of spec # 234-D876 * REQUIRED

Proposed Solution

Attach Files Link Files

Note: To remove an attachment, unselect it. Only newly added attachments can be removed.

04132011_Test Doc 1_IE9 Compatbilty Check.doc

04132011_Test Doc 2_IE9 Compatbilty Check.doc

5

6

Save As Draft Route Cancel

Route an RFI

Start Workflow: Info

1. Info 2. Performers

ir_rfi_workflow
Initiator:
Start Date: 8/31/2010 2:38 PM

1.

Comments entered to this RFI will be viewable by ALL participants of the RFI

RFI Notes:

(Maximum 2000 Characters)

RFI Due Date: Sep 21, 2010

2.

Previous Next Finish Cancel

1. All comments are viewable to all participants on the RFI.

2. The RFI due date will automatically default to the present date. You may enter any future date. Click "Next".

3. Select the Performers. Only one person can be assigned "Resolution"* responsibility. An unlimited number of users can be assigned for "Review" or "Information". Click "Finish".

*Not all users have "Resolution" permission.

Start Workflow: Performers

1. Info 2. Performers

ir_rfi_workflow
Initiator:
Start Date: 8/31/2010 3:05 PM

Contains [] Show Items 100

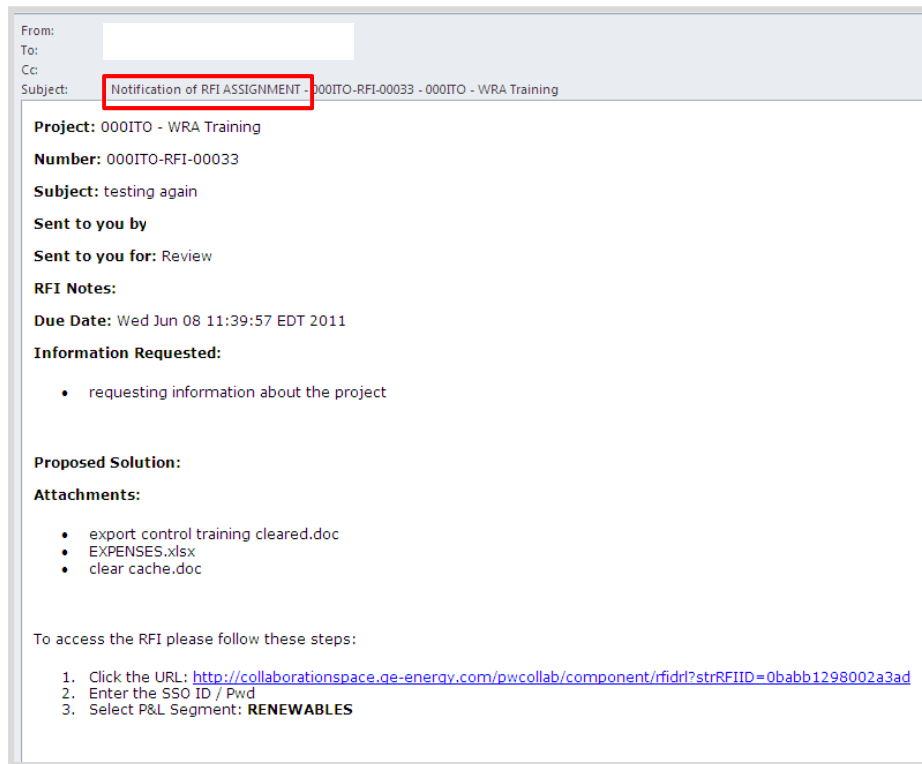
User Name Route For	User Email	Resolution	Review	Information
		<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="radio"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
		<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>

3.

Previous Next Finish Cancel

Email Notification – Initial Routing

All performers on the RFI will receive an email notification. If you are the Resolver or a Reviewer, a task is also placed in your Documentum Inbox.



The screenshot shows an email notification with the following details:

From: [Redacted]
To: [Redacted]
Cc: [Redacted]
Subject: Notification of RFI ASSIGNMENT - 000ITO-RFI-00033 - 000ITO - WRA Training

Project: 000ITO - WRA Training
Number: 000ITO-RFI-00033
Subject: testing again
Sent to you by:
Sent to you for: Review
RFI Notes:
Due Date: Wed Jun 08 11:39:57 EDT 2011
Information Requested:

- requesting information about the project

Proposed Solution:
Attachments:

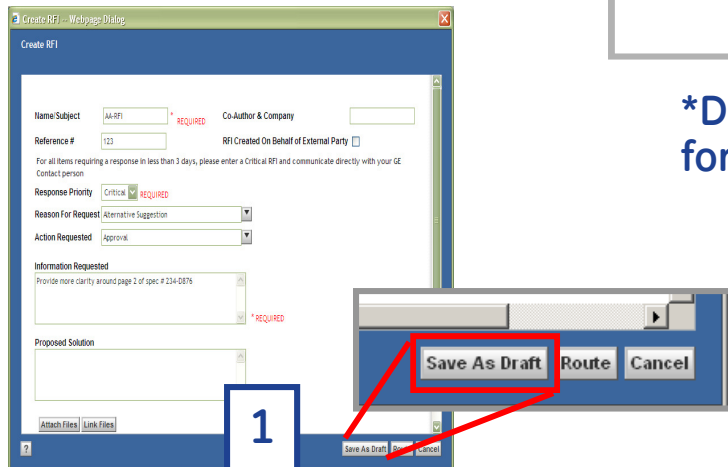
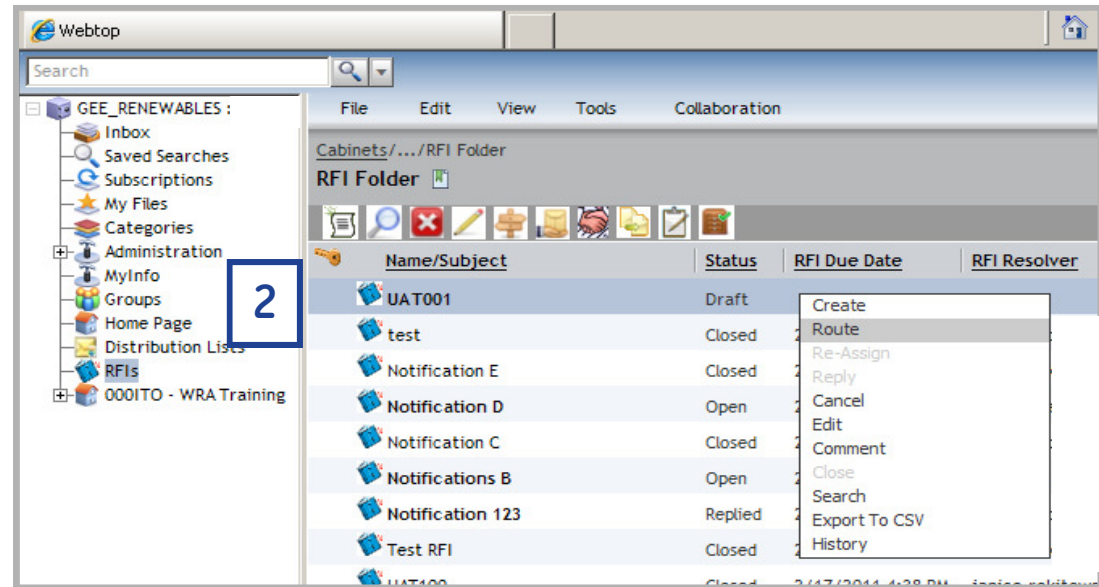
- export control training cleared.doc
- EXPENSES.xlsx
- clear cache.doc

To access the RFI please follow these steps:

- Click the URL: <http://collaborationspace.ge-energy.com/pwcollab/component/rfidr?strRFIID=0babb1298002a3ad>
- Enter the SSO ID / Pwd
- Select P&L Segment: **RENEWABLES**

RFI - Save as Draft

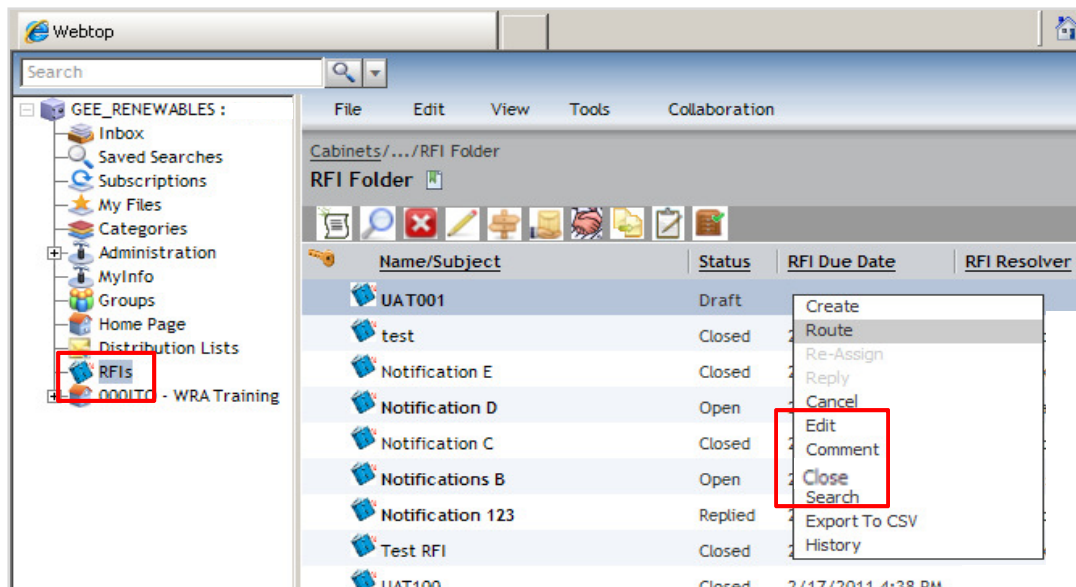
1. After completing fields and/or attaching files click "Save as Draft" to complete later
2. RFI form is saved in RFI node. To perform actions on Draft RFI, select; right-click it to open menu, select action



***Draft RFIs may be Edited, Cancelled, Routed for Resolution or Commented to.**

Other Creator Actions

- Always has access to RFI, recipient of final Reply/Completion.
- Can “Edit” RFI content to provide more detail, request additional information and include new attachments. May also choose “Comment” to add comments/attachments. Has the ability to “Change Routing” to replace the Resolver and add more Reviewers or users receiving the RFI for information. Email notifications will be sent (see next slide) to the performers.
- Can “Cancel” an RFI as needed, removing tasks from Resolver/Reviewers’ queues. An email notification will be sent to the performers.
- Can “Close” an RFI once the Resolver has performed the Reply – Complete action.



From the RFI node, right click an RFI to take action

Email Notifications – Comment/Edit

From: [Redacted]
To: [Redacted]
Cc: [Redacted]
Subject: Notification of RFI Comment Added - 000ITO-RFI-00028 - 000ITO - WRA Training

Project: 000ITO - WRA Training
Number: 000ITO-RFI-00028
Subject: BB Test
Comment Added by:
Comment added date: Wed May 25 10:09:57 EDT 2011
Comment added: Adding comments as creator
Due Date: Tue May 31 10:25:17 EDT 2011
Information Requested:

- Routing Test

Proposed Solution:
Attachments:

- Project Locator.doc

To access the RFI please follow these steps:

1. Click the URL: <http://collaborationspace.ge-energy.com/pwcollab/component/rfidr?strRFIID=0babb12980028a7d>
2. Enter the SSO ID / Pwd
3. Select P&L Segment: **RENEWABLES**

“Comment” Email Notification

From: [Redacted]
Sent: Wednesday, May 25, 2011 10:22 AM
To: Beck, Betty A. (GE Power & Water)
Subject: Notification of RFI Edit, additional information added by RFI Creator - 000ITO-RFI-00028 - 000ITO - WRA Training

Project: 000ITO - WRA Training
Number: 000ITO-RFI-00028
Subject: BB Test
RFI Status: Open
RFI Edited by:
Edit date: Wed May 25 10:21:48 EDT 2011
Additional Information Added: Please add revised drawings
Due Date: Tue May 31 10:25:17 EDT 2011
Information Requested:

- Routing Test
- Additional Drawings Needed

Proposed Solution:
Attachments:

- A Train Subscriptions-JR.txt
- Project Locator.doc

To access the RFI please follow these steps:

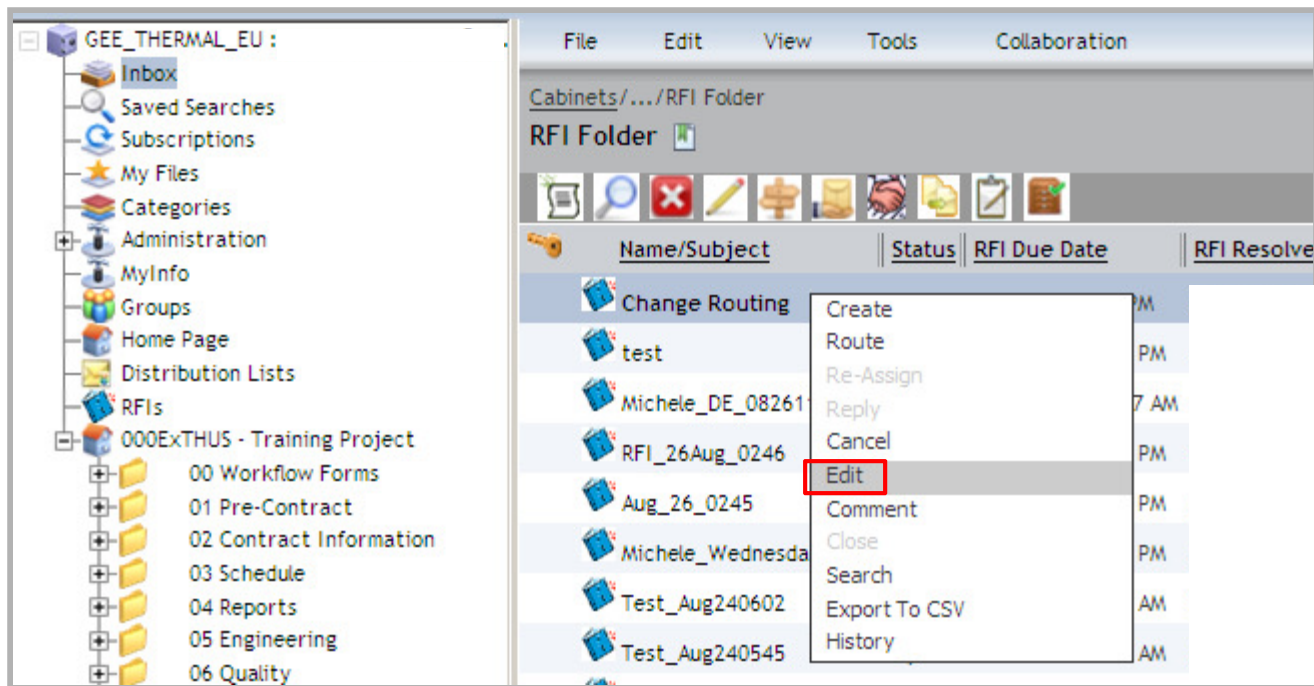
1. Click the URL: <http://collaborationspace.ge-energy.com/pwcollab/component/rfidr?strRFIID=0babb12980028a7d>
2. Enter the SSO ID / Pwd
3. Select P&L Segment: **RENEWABLES**

“Edit” Email Notification

*An email notification will also be sent when an RFI is cancelled.

RFI – Change Routing

The Creator is able to change the routing of an in-progress RFI. Select it, right click then choose “Edit”, or you may open the RFI and choose “Edit” at the top of the form.



RFI – Change Routing

In the bottom portion of the opened form, the Creator is required to complete the “Edit Notes” section and may add attachments. Click “Change Routing”. The USER LIST will open.

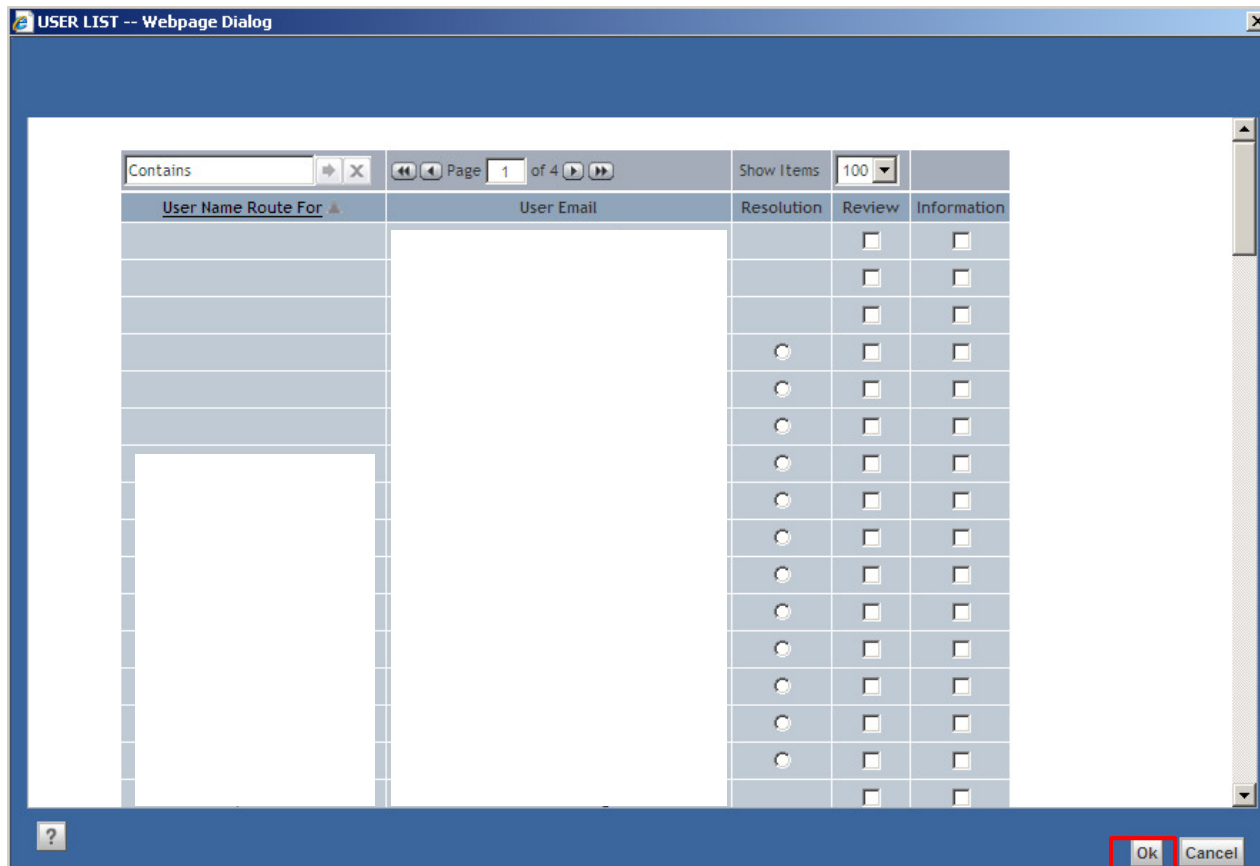
The screenshot displays the 'Edit RFI' form for RFI Number 000EXTHUS-RFI-00074. The form is divided into several sections:

- Request for Information:** Includes fields for Status (Open), RFI Due Date (Sep 9, 2011 3:24:19 PM), Creator Name, Project (000EXTHUS - Training Project), Created (Sep 2, 2011 3:23:33 PM), and Co-Author & Company.
- Name/Subject:** Change Routing, Reference #.
- Reason For Request:** Alternative Suggestion (dropdown).
- Action Requested:** Direction (dropdown).
- Original Information Requested:** Re-Routing to new RESOLVER.
- New Information Requested:** (Maximum 2000 Characters).
- Original Proposed Solution:**
- New Proposed Solution:** (Maximum 2000 Characters).
- Routing:** RFI Resolver, RFI Reviewer, RFI Information User, RFI Due Date (Sep 9, 2011 3:24:19 PM), and Change Date (Sep 9, 2011).
- Change Routing:** A section with a red arrow pointing to it, containing an 'Edit Notes' button (highlighted with a red box), a text area for notes (Maximum 2000 Characters), and 'Attach File' and 'Link Files' buttons (both highlighted with red boxes). A checkbox for 'A Subscript Notif CHANGE Folder.txt' is also present.

A blue box labeled 'Current Routing' is positioned over the Routing section. The bottom of the form has 'OK' and 'Cancel' buttons.

RFI – Change Routing

You may choose a new Resolver, add reviewers and users receiving the RFI for information. Click “Ok” to complete action.



RFI – Change Routing

The screen refreshes and the form opens to show the changed routing. The information is also updated in the RFI node.

Routing

RFI Resolver :
RFI Reviewer :
RFI Information User :
RFI Due Date : Sep 9, 2011 3:24:19 PM
Change Date : Sep 9, 2011

Change Routing
For Resolve :

Cabinets/.../RFI Folder

RFI Folder

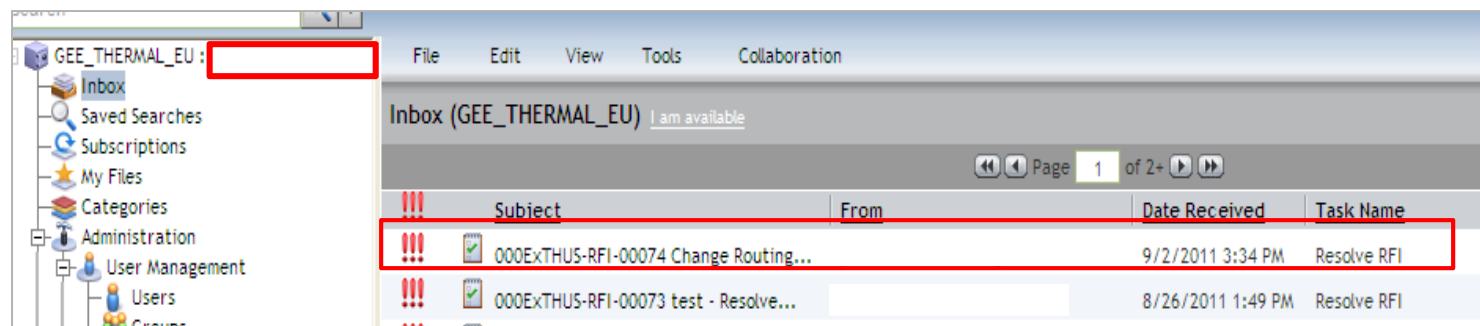
Name/Subject	Status	RFI Due Date	RFI Resolver	Created
Change Routing	Open	9/9/2011 3:24 PM		9/2/2011 3:23 PM
test	Open	9/16/2011 1:49 PM		8/26/2011 1:43 PM
Michele_DE_082611	Closed	8/29/2011 11:57 AM		8/26/2011 11:55 AM
RFI_26Aug_0246	Closed	9/16/2011 5:18 PM		8/25/2011 5:17 PM

RFI – Change Routing



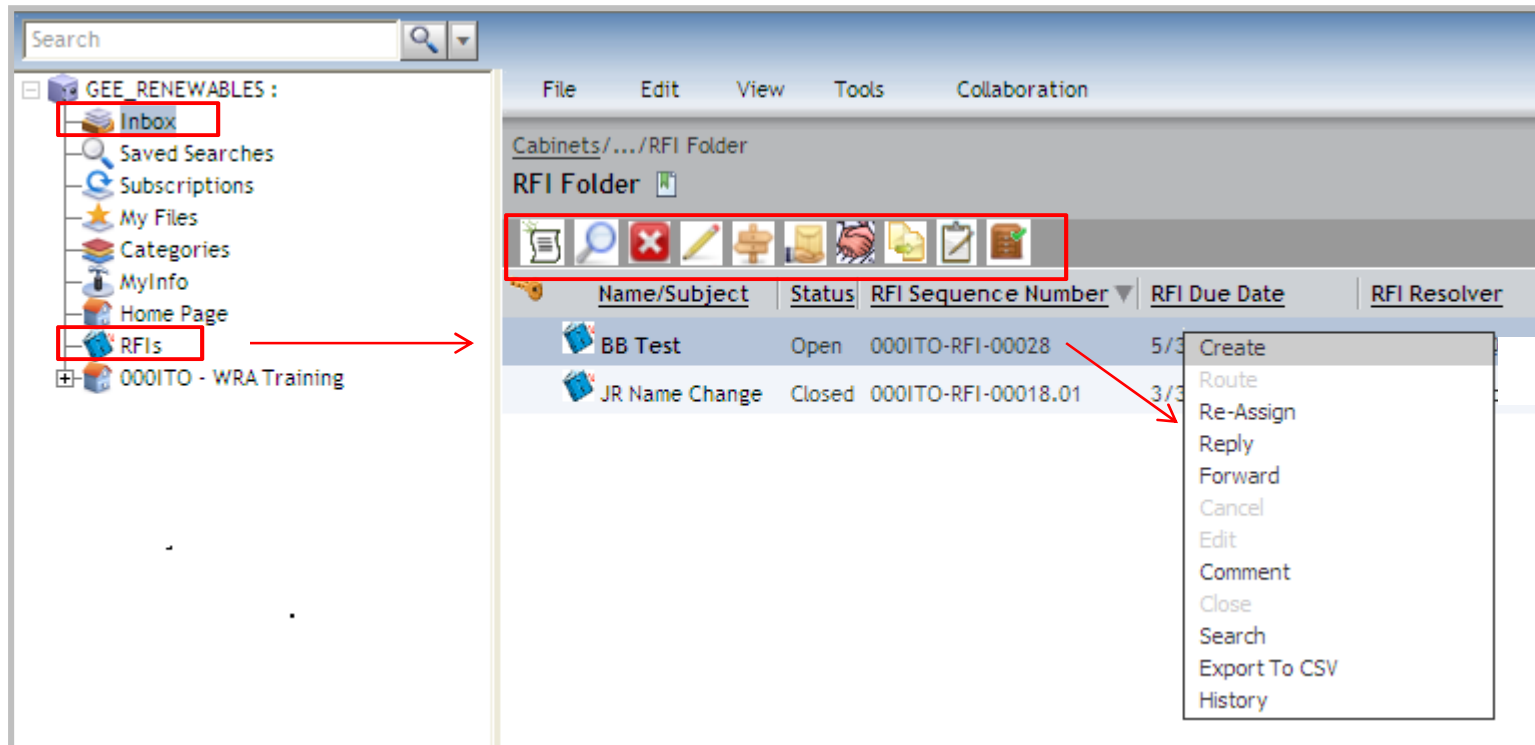
The new parties will receive an email notification and those with action items will see a task in their Documentum Inbox.

Take the appropriate action as required to complete your action in the RFI as you normally would.



RFI – Reply

Only the “Resolver” has the authority to “Reply” to an RFI. The Reviewers may add comments/attachments. The Resolver can act on the RFI from the link in the email notification. To reply to an RFI from the RFI node, select it, right click and choose “Reply”. You may also use the menu icons. To reply from the Inbox, double click on the RFI to open, then right click (see next slide).



RFI – Reply

From the Inbox, choose and double click the RFI to open, then right click to take action

search

GEE RENEWABLES :

- Inbox
- Saved Searches
- Subscriptions
- My Files
- Categories
- Administration
- MyInfo
- Groups
- Home Page
- Distribution Lists
- RFIs
- 000ITO - WRA Training

File Edit View Tools Collaboration

Info

000ITO-RFI-00027 JR Test - Resolve RFI

Description: ir_rfi_workflow 2011-05-23

From:

Received: 5/23/2011 3:40 PM

WorkFlow Instructions:

Requirements : Instructions : To take action on this RFI, please right click on the RFI below, and perform the tasks.
none

Name	Format	Modified
000ITO-RFI-00027 JR Test		5/23/2011 3:40 PM

- Create
- Re-Assign
- Reply
- Forward
- Cancel
- Edit
- Comment
- Close
- Search
- Export To CSV
- History

RFI – Reply

Input the “Final RFI Notes”, choose “Action” (the Resolver has the option to reply but leave the RFI open, complete the RFI and it will be closed by the Creator, or complete and close the RFI). The Resolver can attach or link files with the reply. Click “Ok” to complete action. An email notification will be sent to all performers.

Reply/Complete RFI

Information Requested

- Confirm routing

Proposed Solution

Resolution

Routing

RFI Resolver :
RFI Reviewer :
RFI Information User :
RFI Due Date : Jun 13, 2011 3:40:18 PM

RFI Notes

Date	By	Action	Notes
------	----	--------	-------

Final RFI Notes

Comments entered to this RFI will be viewable by ALL participants of the RFI

(Maximum 2000 Characters)

Action

- Reply - Complete - Close
- Reply - Leave Open
- Reply - Complete
- Reply - Complete - Close

Basic Cause Code
Near Root Cause
Root Cause

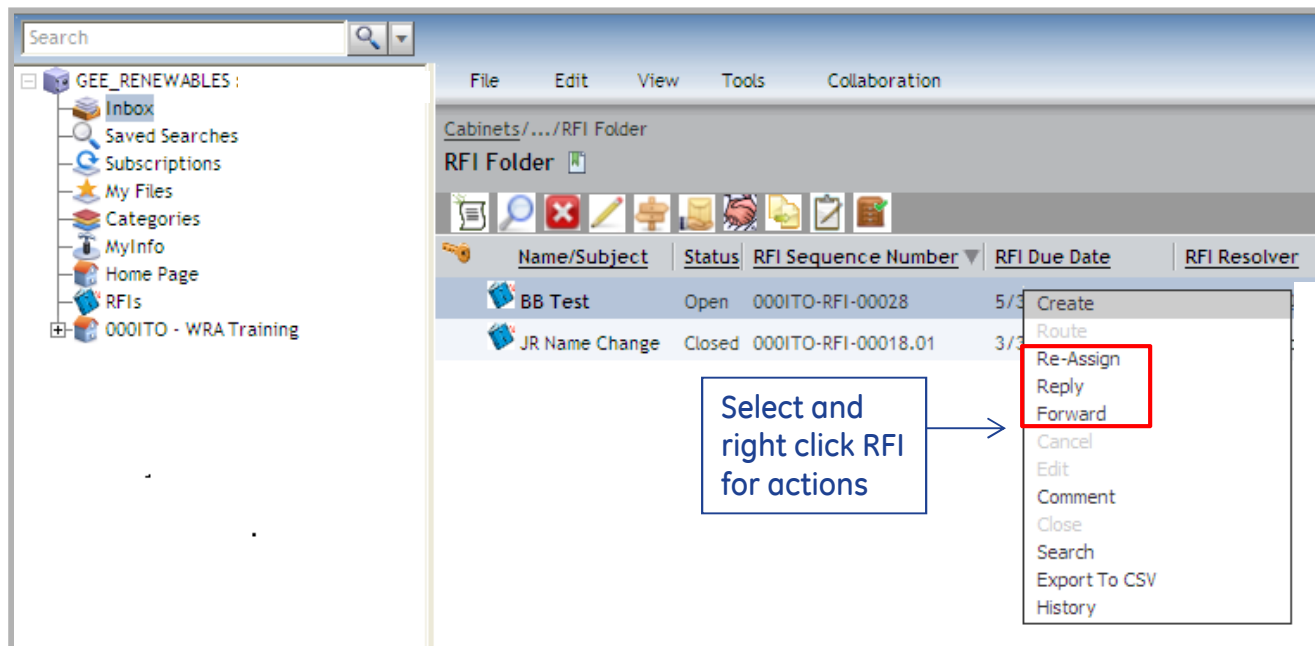
Attach Files **Link Files**

Project Locator.doc

OK **Cancel**

Other Resolver Actions

- Re-Assign - The Resolver may designate the resolution responsibility to another user, therefore removing themselves as a performer altogether (and removing their Documentum Inbox task).
- Forward - The Resolver may “Forward” an RFI to other users for response and the exchange between the Resolver and the Forwarded parties is private . The Resolver may elect to, or not to include these responses in their reply to the RFI Creator.



RFI – Re-Assign

1. Complete the mandatory field “Reassign Notes”.
2. Select the user (one only) for reassignment and click the radio button in the “Resolution” column.
3. Attach/link additional files as needed
4. Click “Reassign”. The reassignment is complete.
5. The re-assigned user will receive an email notification and is now the “Resolver” and responsible to “Reply” to this RFI.

Reassign RFI

Routing

RFI Resolver :
RFI Reviewer :
RFI Information User :
RFI Due Date : Jun 13, 2011 3:40:18 PM

RFI Notes

Date By Action Notes

Reassign Notes

Comments entered to this RFI will be viewable by ALL participants of the RFI

(Maximum 2000 Characters)

Reassign To

Contains	Resolution
Rokitouski, Janice	<input type="radio"/>
janice.rokitowski@ge.com	<input checked="" type="radio"/>

Attachments

Attach File Link Files

Project Locator.doc

RFI – Forward

1. Complete the mandatory field “Forward Notes”.
2. Select the user(s) to forward to by checking the box(es) in the “Review” column.
3. Attach/link additional files as needed
4. Click “OK”. The RFI will be forwarded.
5. The Resolver and user(s) chosen for forwarding will receive an email notification.

Forward RFI -- Webpage Dialog

Forward RFI

RFI Resolver :
RFI Reviewer :
RFI Information User :
RFI Due Date : Jun 13, 2011 3:40:18 PM

RFI Notes

Date	By	Action	Notes
Forward Notes			

Comments entered to this RFI will be viewable by ALL participants of the RFI

(Maximum 2000 Characters)

RFI Due Date : Jun 1, 2011

Forward To

User Name Route For	User Email	Review
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>

Attach Files Link Files

Project Locator.doc

OK Cancel

RFI – Forward

The recipients may either “Comment” or “Reply” (also “Forward” to other users as necessary) and attach or link files with either action. An email notification is sent to the Resolver and all forwarded parties. When the Resolver closes the parent RFI, the separate forwarded RFI (denoted by .01, .02, etc. following the RFI sequence number) is also closed and the task is removed from the forwarded parties’ Documentum Inbox.

Reply to a forwarded RFI:

1. Complete the mandatory field “Final RFI Notes”.
2. Attach/link additional files as needed
3. Click “OK”. The RFI will be returned to the Resolver.
4. The Resolver and user(s) chosen for forwarding will receive an email notification.

Reply/Complete RFI

RFI Notes

Final RFI Notes

Comments entered to this RFI will be viewable by ALL participants of the RFI

(Maximum 2000 Characters)

Action: Reply - Leave Open

Basic Cause Code

Near Root Cause

Root Cause

Attach Files Link Files

Project Locator.doc
 4000 words.doc
 When in different project.docx

Ok Cancel

RFI – Reply – Include Forwarded Responses

The Resolver of an RFI may elect to include the response and files from RFI's that were Forwarded to other users by following the steps listed below. The Resolver would then add "Final RFI Notes", choose an "Action" and select "OK" as outline on Page 26.

Include Forwarded Responses:

1. In the Resolution field check "Include in my reply"
2. Attach any files from the Forwarded RFI by checking the box next to the file to be attached.
3. Proceed with Reply actions as outlined on Page 26.

Resolution

Date	By	Reply	Include in my reply
Mon Apr 15 17:51:40 EDT 2013		Adding additional information and attachments to an RFI that has been Forwarded.	<input checked="" type="checkbox"/>

Routing

RFI Resolver :
RFI Reviewer :
RFI Information User :
RFI Due Date : Feb 28, 2013 12:21:05 PM

RFI Notes

Date	By	Action	Notes
Sat Apr 06 17:06:27 EDT 2013		Edit	testing; reassign RFI

Final RFI Notes

Comments entered to this RFI will be viewable by ALL participants of the RFI

Replying to RFI.

(Maximum 2000 Characters)

Action: Reply - Complete - Close

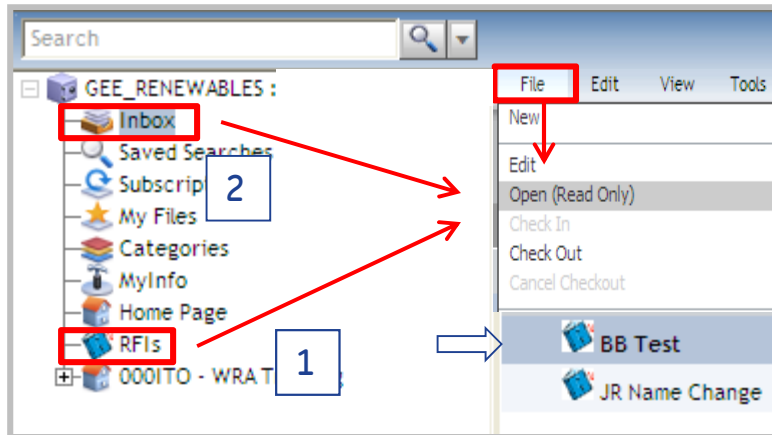
Basic Cause Code:
Near Root Cause:
Root Cause:

Attach Files | Link Files

Attachments from Child RFIs:

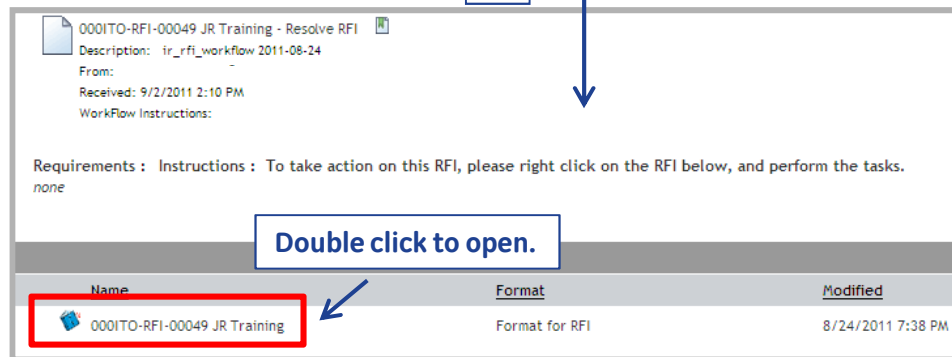
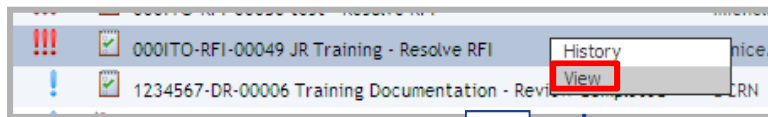
- 01192010_Documentum Test Doc 3-Mid.docx
- 01192010_Documentum Test Doc 2-Mid.docx
- 01192010_Documentum Test Doc 1-Mid.docx
- 01192010_Documentum Test Doc 4-Mid.docx

RFI – View and Print



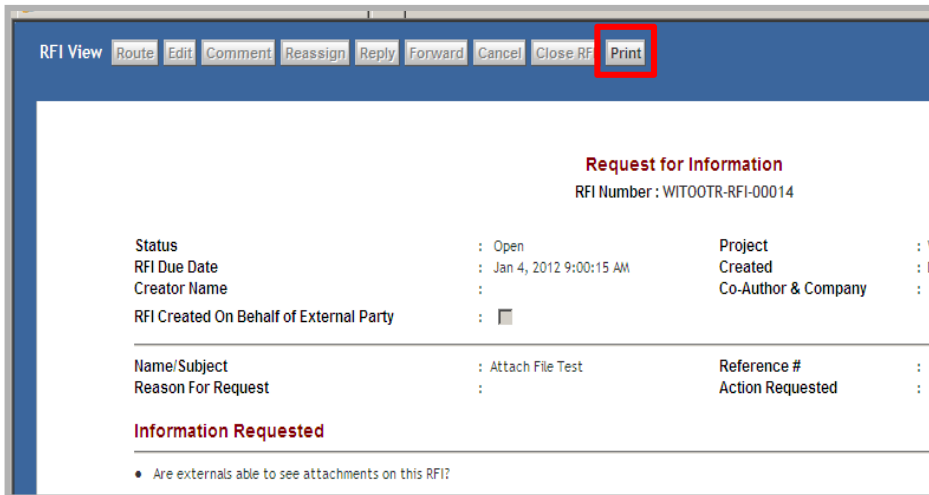
To open (view) the RFI from the:

1. RFIs node - select and double click the RFI or choose "File", "Open (Read Only)".
2. Documentum Inbox - select the RFI, choose "File", "Open (Read Only)" or right click the RFI, Select "View" and in the window that follows both options, double click the RFI to open.



If you received an email notification as a role member, you may also use the link at the bottom to access the RFI.

RFI – View and Print



The screenshot shows the 'RFI View' page. At the top, there is a navigation bar with buttons: 'Route', 'Edit', 'Comment', 'Reassign', 'Reply', 'Forward', 'Cancel', 'Close RFI', and 'Print'. The 'Print' button is highlighted with a red box. Below the navigation bar, the page title is 'Request for Information' with the RFI Number: WITOOTR-RFI-00014. The main content area displays the following information:

Status	: Open	Project	: W
RFI Due Date	: Jan 4, 2012 9:00:15 AM	Created	: De
Creator Name	:	Co-Author & Company	:
RFI Created On Behalf of External Party	: <input type="checkbox"/>		

Name/Subject	: Attach File Test	Reference #	:
Reason For Request	:	Action Requested	:

Information Requested

- Are externals able to see attachments on this RFI?

To print the RFI, open (read only) the form and choose the “Print ” button at the top. A new screen will load to “Confirm Print”. Click to print the RFI.



The screenshot shows the 'Confirm Print' page. At the top, there is a button labeled 'Confirm Print', which is highlighted with a red box. Below the button, the page title is 'Request for Information' with the RFI Number: WITOOTR-RFI-00014. The main content area displays the following information:

Status	: Open	Project	:
RFI Due Date	: Jan 4, 2012 9:00:15 AM	Created	:
Creator Name	:	Co-Author & Company	:
RFI Created On Behalf of External Party	: <input type="checkbox"/>		

The Table Below Lists the Actions Allowed Within the Specific RFI Roles

	Comment	Cancel	Edit	Forward	Re-Assign	Reply-Complete	Reply-Complete-Close	Close (only After Reply-Complete)
Creator	Yes	Yes	Yes	No	No	No	No	Yes
Resolver	Yes	No	No	Yes	Yes	Yes	Yes	No
Reviewer	Yes	No	No	No	No	No	No	No
Information	No	No	No	No	No	No	No	No

FYI:

- Email notifications are sent to all involved parties when there is an action taken on the RFI.
- Once an RFI is closed or cancelled, it cannot be re-opened and no further actions can be taken.