

RFIs Quick Start Guide

An Introduction To Implementing The MasterLibrary[™] RFI Tool

RFIs (Requests For Information or Interpretation) is one of MasterLibrary[™] software's most popular **Construction Admin** module tools because of the amount of time it saves on completing this common procedure.

Reductions of 50% or more in RFI completion times are not uncommon for MasterLibrary[™] users after just a few weeks of regular use.

Based on the software's Tool Permission Settings, RFIs can easily be created by authorized team members and sent to someone else on the team for action including:

- Respond with requested information;
- Open for discussion;
- Issue an ASI or Field Order/RFP, or;
- Complete and archive the request.

Like all MasterLibrary[™] tools, the RFI process increases team accountability with controlled transparency among relevant members via automatic RFI log creation.

This *RFI Quick Start Guide* is designed to help all team members use this tool to everyone's advantage.

Thanks in advance for your attention. As always, MasterLibrary[™] Customer Support is available if you need additional help.

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1	To use the RFL tool, you will need to have:	
rerequisites	• A Masterl ibrant [™] company and user account	
	Bead the Ouick Start Guide For All Users	
	 Logged into the software and explored the interface 	Д
	Become familiar with basic software icons, screens	2
	and conventions	
	 Been assigned to a MasterLibrary[™] project team 	
	Been provided access to the Construction Admin	
	module and RFI toolset	
	If you do not have all these prerequisites, please	
	see your organization's appropriate MasterLibrary™	
	see your organization's appropriate MasterLibrary™ Project Admin.	
IMPORTANT	see your organization's appropriate MasterLibrary [™] Project Admin. This <i>Quick Start Guide</i> is for the RFI tool of the same	
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The RFI Tool In Action



Team members can stay on the same page whether they can attend a particular meeting or not with 24/7 access to MasterLibrary[™] software. A contractor on a construction project has a question about the interpretation of an architect's drawing that could hold up work if not answered quickly.

Using an internet-enabled device, the contractor logs into MasterLibrary[™] software and quickly creates an RFI with references to Contract, Drawing Number and Section. Within seconds, the RFI is sent electronically to the Architect that issued the drawing.

The Architect is on vacation but the Project Manager, who has also been included on the RFI distribution list, is available. With the same RFI

authorization level as the Architect, the PM can instantly respond to the RFI with the correct drawing interpretation and send it to the Contractor to implement.

For RFIs that require more involved processing, authorized team members can easily open the subject for discussion or issue an ASI or Field Order (including RFPs or Time & Materials).

Because all RFI information is automatically captured, an accurate historical record is also created that can be used to easily pinpoint any variations that may occur.



RFI Process Overview

Like many commonly used MasterLibrary[™] tools, RFIs have the following five phases:

- 1. Draft created by issuer.
- 2. **Issued** by issuer.
- 3. Acknowledged by recipient.
- 4. Options by invited team members.
- 5. Completed by recipient.



Optional steps shown in italics.



As shown above, each phase includes a few simple tasks as outlined in this Quick Start Guide. For more complete procedural documentation, select the Help icon ? from within the application to display an Index.

These steps are graphically highlighted on select software screens to guide you through the process. The example below is displayed when you are entering Information in step 1, the Draft phase.







Optional steps shown in italics.

Note: These *Quick Start* pages are procedural overviews. Select the Help ? icon from any screen in the software to display an index of available online documentation.

1. Create An RFI Draft

From any Project screen, select the **RFI** tool from the **Construction Admin** modules line in the blue header.

Your **RFI Log screen** will be displayed with no entries if this is the first RFI created.

1-1. Create RFI Draft with question

Select the **Create/Add** icon **T** to the upper right of the RFI Log screen.

RFI Summary Screen header



Notes:

- You can also access the RFI tool from the **Tool Index** Menu icon is in the top left of the blue header.
- The modules available from your MasterLibrary[™] account may differ from the ones shown in the screen header below.

The **Create RFI Draft screen** will be displayed as described on the next page.

— continued —



RFIs: Five Easy Steps/1. Create RFI Draft (cont.)



Select the Save Information button to save the RFI Draft.

Note: Selecting *Save Information* only saves the RFI as a draft. The RFI **is not issued** until later in this procedure.

The **RFI Draft screen** will be displayed where you can attach files and/or add more email recipients if desired.

Construction Administration Software RFI Quick Start Guide

RFIs: Five Easy Steps/1. Create RFI Draft (cont.)



A **Select File** dialogue screen will be displayed from which you can select files to be attached to the RFI.

Note: Selected files are attached to the MasterLibrary[™] project and stored in the cloud. You can opt not to include the attachments when issuing the RFI in PDF format. This is helpful when large files are attached to the RFI.

— continued —

RFIs: Five Easy Steps/1. Create RFI Draft (cont.)



1-3. Add Additional Email Recipients (optional)

The RFI issuer and recipient (entered in the To field) will automatically be added to the **Email Recipients** list.

To add more team members to the Recipients list, select the **Add** button to the upper right of the **Email Recipients** field. The *Select Additional Email Recipients* screen will be displayed.

Select Additional Email Recipient screen

dh.	Group Name		
an Email Recip	ient from the Project Directory		
Add Contact	Full name	Phone	Cell
	Architectural Firm – Bob Murphy	-	
2	Architectural Firm - Jaime Smith		
2	AV Subcontractor - Pat Jones		
0	AV Subcontractor - Marc Evans		
	BuildRite Construction Mgmt Charlie White		
	Campus Owner - Nate Owens		

You can select an existing Email Group if one has been created for this project or an individual team member by selecting the check boxes next to the appropriate entry.

Select the **Save Information** button to add the selected entries to the Email Recipients list.

Note: Like all RFI fields, you can change your entries in the Draft mode before issuing the RFI by selecting the **Edit** (pencil) icon next to the field you want to edit.

— continued —



Edit Field icon





2. Issue the RFI

Once the RFI Draft is finalized with any required files attached and email recipients added, the RFI is ready to be formally issued.

When the RFI is issued, by default the software will automatically:

- Create a PDF of the issued RFI, and;
- Send an email to everyone on the Email Recipients list that includes any attachments.

You can opt not to include the attachments when issuing the RFI in PDF format by selecting the check box next to the Issue RFI button. This is helpful when large files are attached to the RFI.

RFI Draft partial screen



Select the Issue RFI button to submit the RFI to the primary recipient (To) and any other team members added to the Email Recipient list.

The RFI will now be displayed in all team members' RFI logs to track through Completion.

- continued -





3. Acknowledge the RFI

Once the RFI has been issued, the primary Recipient (as selected in the To field by the Issuer) will see the issued Request on the Dashboard when they next log into MasterLibrary[™] software.

The RFI will also appear as Issued in the RFI Log screen for that project. The RFI Log is an easy way for all team members to track the RFI status including color-coded dates and Average Completion Times.

- The **Due Date** will turns **red** when late.
- Days At column color-coded items:
 - green = 1-7 days

orange = 15 - 30 days

yellow = 8-14 days

red = 31+ days

RFI Log with sample entries

REL Average	Files • Drawing/Specs • M Beign Re- Bidders Lisz Estimate • Contract/s/SOW • Sched Correspondence • Men	leeting No views • A • Bid Pa ule of Value W nos • Equ	Front Entry Renovation ▲ tes + Lists + My Action Items + Tasko SI + RFI + Submittals + Field Observ cickages + Bid Addems Ver Bid Addems + Bid Addems Ver Reports + Schedules + Safety Au upment + Assets + Rooms + Requisi	Activities * Transmi ations * Punch Lists Bid Submissions Change Orders * Pa iti ions * Purchase Orders	ttals • Issues y Apps • Work s • Doors	Orders	W X
Completion Time	Average RFI Completion: Less than 1 day			C		C	108
	Draft RFI	PDF	Ball In Court	Contract	Due Date	Date created	Days At
Due Dete	RFI-00003 - Lobby AV drops (more)		Architectural Firm - Jaime Smith	0023 - AV (#003)	5/13/2015	5/4/2015	1
Due Date		10000					
	Issued RFI	PDF	Ball In Court	Contract	Due Date	Date created	Days At
Davs At color-	RFI-00002 - AV (more)	bdf	AV Subcontractor - Pat Jones	0023 - AV (#002)	5/8/2015	5/4/2015 (1 days)	
	WARRAN -						Days To
coded entries	ACCIVED RP1	POP	Entered by / Action by	Comfact	Date Issued	Unite Udmpleted	Complete
	RFI-00001 - AV panel specs (more)	pdf	Architectural Firm - Jaime Smith AV Subcontractor - Pat Jones	0023 - AV (#001)	4/23/2015	4/23/2015	0





RFIs: Five Easy Steps/3. Acknowledge RFI (cont.)



3-1. Acknowledge RFI receipt

Select the issued RFI name from either the Dashboard or RFI Log screen. The associated RFI will be displayed with the information entered by the Issuer.

Select the Acknowledge command at the upper left of the screen.

RFI Acknowledge screen

	Front Entry Files • Drawing/Specs • Meeting Notes • Lists • My Design Reviews • ASI • RFI • Subn Bidders List • Bid Packages • Bid Quu Estimate • Contracts/SOW • Schedule of Values • Field Orden Work Reports • So Correspondence • Memos • Equipment • Assets	Renovation A Reference of the second
	Requests for Information > RFI-00002 Issued By: AV Subcontractor 115 Metro Park Rochester, NY 14623 Do Jacob Good Domination Contraction	Action By: Architectural Firm 5297 Parkside Dr Canandaigua, NY 14424
Acknowledge button	Date: 5/4/2015 Proj	ect: Front Entry Renovation

The status of the RFI will change to *Acknowledged* as displayed on all team member RFI Log screens.

3-2. Re-direct the RFI

If the RFI was sent to the wrong team member, the primary Recipient can change the **To** team member by selecting the **Edit** icon next to the To field.



1

Edit icon





4. RFI Options

After the RFI has been Acknowledged, there are a number options available to the team based on the approval level granted to each member:

- 1. The primary Recipient can **Respond** to the RFI to provide the information requested. **See pg. 13.**
- The primary Recipient can open the RFI for Discussion among select email recipients. See pg. 14.
- The issuer of the RFI can send an open email to the appropriate team member (typically the CM) requesting that an **Request For Proposal (RFP)** be issued in response to the RFI. See pg. 17.
- 4. An **ASI** can be issued in response to the RFI. (Only team members with ASI Manager privileges will see this button.) *See pg. 19.*
- A Field Order can be issued in response to the RFI. (Only Contract Admins will see this button.) See pg. 20.

Once options 3, 4 or 5 are taken, the RFI:

- Moves to a Completed status and
- A new ASI, Field Order or Request for an RFP is issued to move the construction project forward.

Each of these options is described in more detail in the pages indicated.



Primary Recipient Options of Acknowledged RFI



4-1. Enter Response

Many times, the primary Recipient can provide the information requested in the RFI.

In these instances, the Recipient selects the **Enter Response** command which displays an *Edit RFI - Modify Response* screen.

The Recipient enters the response in the screen and selects the **Save Information** button.

Edit RFI - Enter Response screen



The entered response now appears on the RFI screen for all applicable team members to see.

Note: The RFI is not completed until step 5 of this procedure.





4-2. Open for Discussion & Make Comments

For times when other team members need to help clarify the RFI, the primary Recipient can open the RFI for Discussion among up to three team members.

In these instances, the Recipient selects the **Open Discussion** command which displays the RFI in **Pending Comments** mode. Comments can be opened for up to three team members in addition to the Primary recipient and issuer.

To Open a Discussion

From the **RFI - Pending Comments** screen, select the **Manage Comments** command to display the *Edit RFI - Manage Comments* screen shown on the next page.

Note: This *Edit RFI - Manage Comments* screen is also displayed if the primary Recipient selects the Add (+) icon in the **Comments** field.

RFI Open Discussion screen

		Files • Estimate • Cor Co	Drawing/Specs • Meeting Not Design Reviews • A Bidders List • Bid Part tracts/SOW • Schedule of Valu Werrespondence • Memos • Equ	Front Entry Renovation es « Lists * My Action Items * Taska SI * RFI * Submittals * Field Observatio Karges * Bid Outestons * Bid Addenda es * Field OrderaRFPFs * Proposals rick Reports * Schedules * Safety Audit ipment * Assets * Rooms * Requisitor	Activities • Transmittals • Issue ns • Punch Lists • Bid Submissions Change Ordens • Pay Apps • W s • Purchase Ordens • Doors	s ork Orders	w 2
	DRAFT		ISSUE	ACKNOWLEDGE	OPTIONS		COMPLETE
Manage Discussion	Requests for Informat Issued By: AV Subcontract 115 Metro Park Rochester, NY 14633 Manage Comments	tion > RFI-00003 or Close Discussion					Action By: Architectural Firm 5297 Parkside Dr Canandaigua, NY 14424 FOR INFORMATION
U	Date: 5 From: 5 Status: P Due Byr 5 Field Order: Issue (CIC): E ASI:	i/4/2015 Pending Comments i/13/2015		Project: RFI Number: RE: Due By Notes: Contract (Scope of Work Drawing:	Front Entry Renovation RFI-00003 Lobby AV drops	(#003) [2
	Spec. Section:		Paragraph:	Drawing Reference:	Drav	wing Detail:	
	Description of Requ	uest:	1				
Add Comment icon	Description of Resp	oonse:	7				
	Comments: (Archi-Tech	hnology, LLC - Mark Winterstei	n) 🛃				
	Attachments Attachment Name		Date Uploade	d Uploa	aded By	-	۵
				- continued			



RFIs: Five Easy Steps/4. Options/ 4-2. Open for Discussion (cont.)

	Open a Di	scussion (con	t.)		
4 Options	Edit RFI - M	anage Discussio	n screen		
	Files • Estimate • Con Con	Fro Drawing/Specs • Meeting Notes • L Design Reviews • ASI • R Bidders List • Bid Packages tracts/SOW • Schedule of Values • F Work Rey respondence • Memos • Equipment	nt Entry Renovation lists • My Action Items • FI • Submittals • Field C • Bid Questions • Bid A Field Orders/RFP's • Prop ports • Schedules • Safe • Assets • Rooms • Ri	Tasks • Activities • Tran bservations • Punch Lists ddenda • Bid Submission osals • Change Orders • ty Audit equisitions • Purchase On	smittals • Issues s Pay Apps • Work Orders ders • Doors
	IRAFT Pending Comments	25501 Feedbag Compilete	ACKNOWLEDGE Request RPP	OPTIONS Issue ASI	COMPLETE Issue AD
	Edit RFI - Manage C	omments			
	Comment User 1 :	- Please Select -		•	
Comment Users	Comment User 2 :	- Please Select -		:)	
1 - 3 (in addition to	Comment User 3 : Comments :	- Please Select -		•	
primary Recipient		NOTE: Any comment entered here will be	e emailed to the entered by, action	on by and all users invited to com	ment on this item.
and Issuer)					
Commonts field					
Comments neid					
Save Information		Save Information			

From the Edit RFI - Manage Comments screen:

- Select up to three project team members to include in Discussion from the drop-down menu selection.
- Enter an initial comment in the Comment field. Be specific in both the wording of your comment and which discussion participant(s) you think can provide the required information.

• Select Save Information.

An email is sent to all Discussion participants with a link to the RFI screen that now includes the initial comment.

Note: Posted **Comments** are visible to **all** team members regardless of who is selected in the *Comment User* fields.

- continued -



RFIs: Five Easy Steps/4. Options/ 4-2. Open for Discussion (cont.)



To Reply/Add Comments

Discussion participants can reply to the posted comment or add new ones by selecting the **Add (+)** icon to the right of the **Comment** field header.

An Add Comment field screen will be displayed that is similar to the Manage Comments version (previous page) except the discussion participants cannot be changed.

- To enter a comment:
- Enter the text in the Comment field.
- Select Save Information.

The comment will be added to the RFI and all discussion participants will be notified of the new comment via email and on their MasterLibrary dashboards.

To Close A Discussion

Once the primary recipient (or whomever open the discussion) receives the required information via a Comment, selecting the Close Discussion command from the RFI screen will:

- Close the discussion.
- Move the RFI to a *Pending Complete* status which is reflected in team members' RFI logs.

Construction Administration Software RFI Quick Start Guide



4-3. RFP Required

The issuer of the RFI can send an open email to the appropriate team member (typically the CM) requesting that an **Request For Proposal (RFP)** be issued in response to the RFI.

RFI – Request Issuance of RFP screen



When the user selects **Request RFP** from the RFI screen, a per-addressed *Send E-mail* screen is displayed where an **Email Body** can be entered.

Whoever is sending this email will be the recipient of the RFP.

— continued —



RFIs: Five Easy Steps/4. Options/ 4-3. Request Issuance of RFP (cont.)



Other options from this screen include:

- Add Attachments
- Send email to
- External Recipients (non-team members)
- Issue (CIC) drop-down menu

Once the desired fields are completed, the user can:

- 1. Send the email. This sends the RFP request to the team member in the To field as well as team members and external recipients shown.
- 2. Save it as Draft to review and send at a later date. The draft request will be available from your Dashboard and RFI log to access, edit and send.
- 3. Discard the email.





4-4. Issue ASI

The primary Recipient can issue an Architect's Supplemental Instructions (ASI) at any time given appropriate tool permission settings. (Only team members with ASI Manager privileges will see this button.)

RFI – Issue ASI screen

File Estimate •	es • Drawing/ E Contracts/SOV Corresponder	Specs • Mee Design Review Bidders List • W • Schedule nce • Memos	Fro ting Notes • L vs • ASI • R Bid Packages of Values • F Work Rej • • Equipment	nt Entry Renov ists • My Action lite FI • Submittalis • Bid Questions • field Orders/RFP's ports • Schedules • Assets • Room	ation A ms • Tasks Field Observal Bid Addenda • Proposals • • Safety Audit s • Requisition	Activities • Tran ions • Punch Lists Bid Submission Change Orders • ins • Purchase Ord	smittals • Is s Pay Apps • ters • Doon	sues Work Orders	H
DRAFT		ISSUE		ACKNOWLEDGE		OPTIONS		COMPLETE	
dd an ASI									
fo:	- Please Select	•	1						
Contract (Scope of Work) :	No Contrac	ts	1						
RFI :	RFI-00003 Lob	by AV drops 💠							
Regarding :									
Jescription :			-1 - 1	X @ ?		Aa			
Specification Section :									
Drawing Reference :									
ssue (CIC) :	No Issue								
ustification :	N/A	_	:						
	Save In	nformation							

When the Recipient selects the **Create ASI** command, the **Create an ASI** screen is displayed where the following fields can be entered (*mandatory):

- To (drop-down team member list)*
- Contract/Scope of Work drop-down menu
- RFI drop-down menu*
- Regarding text field
- Description text field
- Specification Section text field
- Drawing Reference text field
- Issue (CIC) drop-down menu
- Justification drop-down menu

Once the **Save Information** command is selected, an **ASI** is created and saved in **Draft** mode for the team member who selected the **Create ASI** button.



Generate Field Order

4-5. Generate Field Order

The primary Recipient can issue a Field Order at any time during the RFI process given appropriate tool permission settings. (Only Contract Admins will see this button.)

RFI – Add Field Order screen

DRAFT		ISSUE		ACKNOWLEDGE		OPTIONS		COMPLETE
dd a Field Order								
RFI :	Lobby AV d	rops						
Description :	Clarification	is needed or	n drawing sy	ymbology (half fille	d triangle w/	35 on top left & 6	0 on top righ	nt)
Response :	A Field Orde	er will be iss	sued in resp	oonse to this RFI				
Label :	Field Order	4						
To :	- Please Select		:					
Owner Authorization :	- Please Select	-	:					
Contract :	No Contract	ts	+					
Contract Specific # :								
Regarding :								
Regarding : Description of Interpretation or Change :		1 1 m		• X @		Aa		
Regarding : Description of Interpretation or Change : Due By :	5/5/2015	1 <u>1</u>	<u>-</u>	• X		Aa		
Regarding : Description of Interpretation or Change : Due By : Due By :	5/5/2015	I U m	I	* X ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~		Aa		
Regarding : Description of Interpretation or Change : Due By : Due By Note : RFP :	5/5/2015		1. X &	- X - 0 7		Aa		
tegarding : Description of Interpretation of Change : Due By : Due By Note : tFP : Time and Material :	5/5/2015		1. X.	2		Aa		
Regarding : Description of Interpretation or Change : Due By : Due By Note : RFP : Imme and Material : Jalue :	5/5/2015			- X - 0		Aa		
Regarding : Description of Interpretation or Change : Due By : Due By Note : RFP : Time and Material : Value : Allowance? :	5/5/2015			• X = 0 7		Aa		
Regarding : Jescription of Interpretation or Change : Due By : Due By Note : RFP : Time and Material : /alue : Niowance? : Societtation Section :	5/5/2015 No 1 No 2 \$0		L . I . A	 ▼ ∞ ∞ ∞ 	_	Aa		
Regarding : Description of Interpretation or Change : Due By : Due By Note : RFP : Time and Material : /alue : Vilowance? : Specification Section : Zpecification Section :	5/5/2015 No 1 No 2 \$0 No 2			 ▼ ∞ ∞ ∞ 	_	Aa		
Regarding : Description of Interpretation or Change : Due By : Due By Note : RFP : Time and Material : Value : Nilowance? : Specification Section : Drawing Reference : RF1 :	5/5/2015	I V M		 ▼ ∞ ∞ ∞ 	_	Aa		
Regarding : Description of Interpretation or Change : Due By : Due By Note : RFP : Time and Material : Value : Allowance? : Specification Section : Drawing Reference : RFI : Sevue (CIC) :	5/5/2015 No 1 \$0 No 2 \$0 No 2 	I V M		- X &	_	Aa		

When the authorized Recipient selects the **Generate Field Order** command, the *Add a Field Order* screen is displayed where the following fields can be entered (*mandatory):

- To (drop-down team member list)*
- Owner Authorization drop-down menu*
- Contract drop-down menu
- Contract-specific # text field
- Regarding text field
- Contract drop-down menu
- Due by Note text field

– continued —

RFIs: Five Easy Steps/4. Options/ 4-5. Generate Field Order (cont.)



- RFP drop-down menu
- Time and Materials drop-down menu
- Value numeric value (no commas)
- Allowance? yes/no drop-down menu
- Specification Section text field
- Drawing Reference text field
- RFI drop-down menu*
- Issue (CIC) drop-down menu
- Justification drop-down menu

Once the **Save Information** command is selected:

- An **Field Order** is saved in **Draft** mode. The Recipient can then use the Field Order tool to add attachments and email recipients before issuing.
- The RFI is marked as **Completed.**





5. Completed

After the information requested in RFI has been provided via a posted comment or other means:

- The primary Recipient enters a **Response** as per RFI Option 4-1 *(see page 13);*
- The RFI can be marked as Complete.

To enter a Response from the RFI screen, see the Option 4-1 procedure on page 13.

To mark the RFI as Complete, select the **Mark Complete** command in the RFI screen.

RFI – screen

**	Files + Dra	wing/Specs + Meeting N Design Reviews + Bidders List + Bid P s/SOW + Schedule of Va	Front Ent otes + Lists + ASI + RFI + Si tackages + Bid lues + Field Or	My Action Items • Tasi ubmittals • Field Obser Questions • Bid Adder ders/REP's • Proposal	ks + Activities + Transr rvations + Punch Lists nda + Bid Submissions s + Change Orders + F	nittalis + Issues Pay Apps + Work Orders	W X
	Corres;	vondence • Memos • Ed	Work Reports + auipment + Ass	Schedules • Safety A ets • Rooms • Requir	udit sitions • Purchase Orde	ers • Doors	ta.
DRAF	т	ISSUED		CKNOWLEDGED	OPTIONS		COMPLETED
Requests for Inform Issued By: AV Subcontract 115 Metro Park Rochester, NY 146 Don't Include Modify Response	nation > RFI-00005 ctor 23 Attachments in Er BEP Required	nail Create ASI Open Di	scussion_M	ark Complete Gen	erate Field Order	Arc Car	Action By hitectural Firm 5297 Parkside D nandaigua, NY 14424 R INFORMATION
Date: From: To: Status: Due By: Field Order: Issue (CIC): ASI:	5/7/2015 Architectural Firm AV Subcontractor Acknowledged 5/11/2015	Jaime Smith Pat Jones 🛛 🛛	Pr Ri Ri Co Di	oject: FI Number: E: ue By Notes: ontract (Scope of V rawing:	Front Entry Re RFI-00005 AV cable drop firm York): 0023 - AV - AV	enovation connector finish 🖾 V Subcontractor (#00	5) 🖾
Spec. Section:		Paragraph:		Drawing Reference:		Drawing Detail:	
Description of R	equest:			A			
Stainless, copper,	bronze or white?						
Description of R 5/7/2015 5:07:53	esponse: Architectu PM -	ral Firm - Jaime Smith					
Stainless Comments: (Av S	ubcontractor - Pat Jones)						

- An email will automatically be sent to everyone associated with the RFI alerting them of the change in status.
- The RFI will change to a Completed status in all appropriate team members' Dashboard and RFI logs.

RFI issuers can archive completed RFIs from the project by selecting the **Archive RFI** button from the RFI screen after it is marked as Complete.

Archiving is not required, but it is a final RFI status indicating that the issue raised in the RFI has been resolved and the item has moved forward in the project.

MASTERLIBRARY, RFI Quick Start Guide

Resources For Successful Implementation

Quick Start Guide For All Users

MASTERLERA

If is project team member, and vectories to the growing teamly of Matelia/Sami's Software users. This: Quark: Sami'guade provides a bird overwise of the people-processes and peparovert. Mult be automated by the software. Please bies alse write the ord this guide prior to your first Matelia/Sami's family greaters as you and the software of your larger and the growing teamly. Thanks in advance for your affective. We look forward to heighing you natious project affects mice, wite consisting of the constant of the growing teamly an extension.

Quick Start Guide
An Introduction To Implementing MasterLibrary™ Software at Your Organization
Hi projectiteem member and welcome to the growing family of MasterLibrary" Software users. As a new MasterLibrary "Mul Client Admin, you will
have a critical role in successful software implementation at your firm. The information in this Quick Start Guide will help you guide your team to fast, efficient software implementation. Thanks in advance for your attention. We look forward
to helping you meet the needs of this important new role.





New Features icon Be sure to check the following online resources within MasterLibrary[™] Software that make learning easy:

- Getting Started Guide: Distributed to all new software users with their access credentials, this PDF provides a basic overview of the software, including login and exploration instructions.
- Quick Start Guides: Two kinds are available:
 - People: General Users, Company and Project Admins
 - Processes: Submittals, RFIs, ASIs, Contracts (including SOV), Meeting Notes and others.
- Help pages: Select the Help icon 🕜 to display a detailed index of available documentation. (You can find answers to 90% of your questions here.)
- **Request Help:** If you still have questions, select <u>Request Additional Help</u> at the top of the Help page for a request form which will typically be answered within the same day.
- Linkedin Users Group: Join fellow ML users to foster dialogue and practical use.
- New Features Index: We are constantly adding new features and improving existing ones to better meet your needs. Click on the New Features icon to see a chronological index of new MasterLibrary[™] features. (You can also sign up for email alerts when new features are added.)
- **Blog:** Contribute to user dialogue about new feature updates, news-to-use and industry trends.
- **Phone Support:** Free U.S.-based phone support is available at **585.270.6676.**



