MasterLibrary™
Construction Administration Software

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.

Table of Contents

Prerequisites

To use the RFI tool, you will need to have:

- A MasterLibrary™ company and user account
- Read the *Quick Start Guide For All Users*
- Logged into the software and explored the interface
- Become familiar with basic software icons, screens 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™ Project Admin.

IMPORTANT

This *Quick Start Guide* is for the **RFI** tool of the same name in the **Construction Admin (CA)** module. For details on using the **Pre-Bid RFI** tool, see the related online documentation.

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.

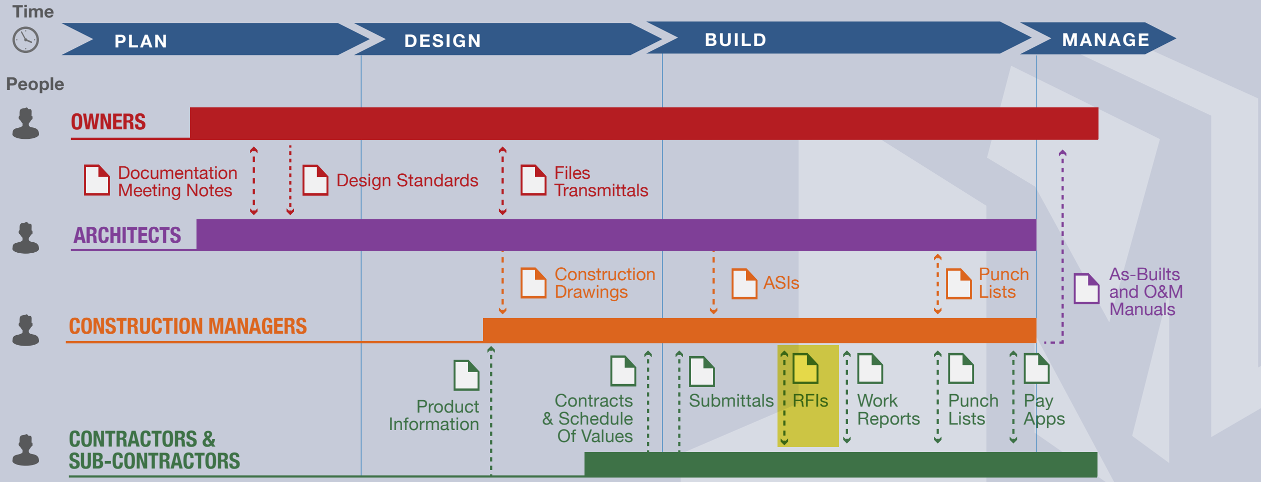
A contractor on a construction project has a question about the interpretation of an architect's drawing that could hold up work if not answered quickly.

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.

1 Draft	2 Issued	3 Acknowledged	4 Options	5 Completed
Issuer	*Issuer*	*Recipient*	*All*	*Recipient*
1. Create RFI draft with question. *2. Attach related data.* *3. Add email recipients.*	1. Issue RFI to authorizer and relevant team members.	1. Acknowledge RFI receipt. *2. Re-direct to appropriate recipient.*	*1. Open for Discussion.* *2. Issue ASI.* *3. Issue Field Order.* *4. Request issuance of RFP.*	1. Enter Response. 2. Mark as Complete.

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.

Help icon

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.

— *continued* —

RFIs: Five Easy Steps

1

Draft

Issuer

1. Create RFI draft with question.
2. *Attached related data.*
3. *Add email recipients.*

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 to the upper right of the RFI Log screen.

RFI Summary Screen header

Tool Index icon   RFI tool command   Create/Add icon

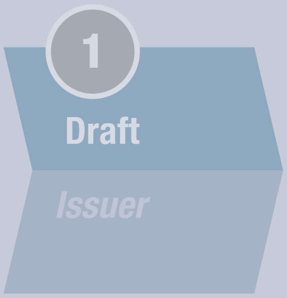
Notes:

- You can also access the RFI tool from the **Tool Index** Menu icon 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 —

*** Mandatory fields**



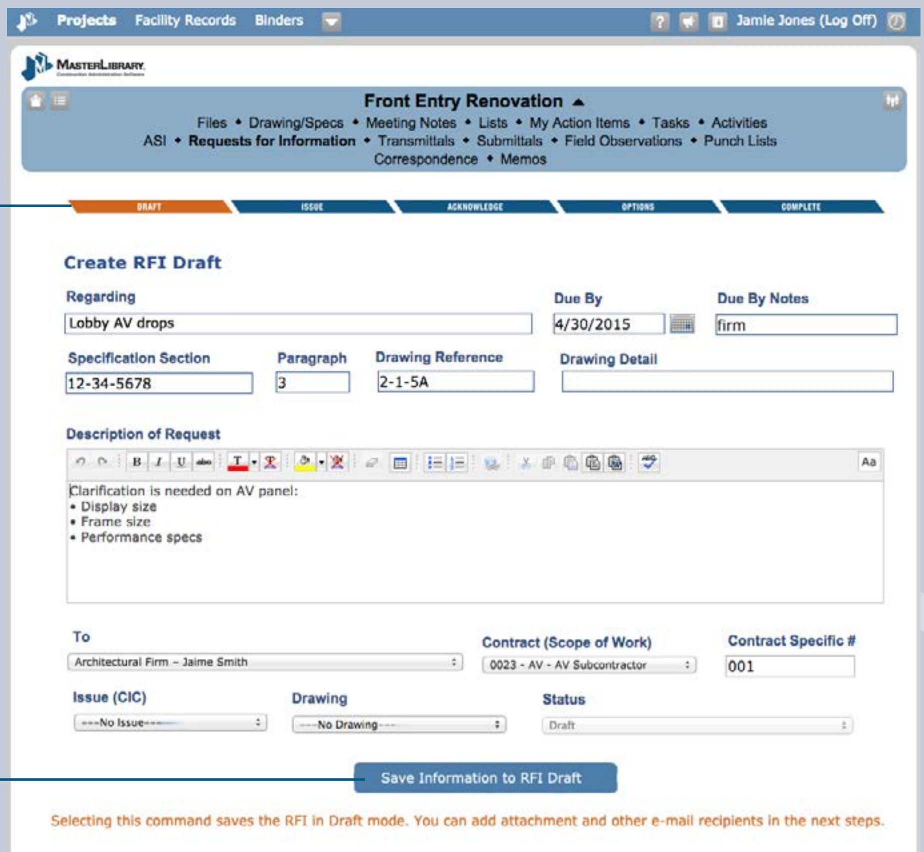
Enter the following RFI information in the **Create RFI Draft screen**:

- **Regarding*** (subject) including **Specification** & **Drawing References** with **Details**
- **Due Date* & Due By Notes**
- **Description of Request***
- **To*** (who is responsible for answering RFI) drop-down menu of available team members
- **Contract (Scope of Work) information** including Contract-Specific numbers, Issues, Drawing and Status (drop-down menus).

Create RFI Draft screen with sample entry

process charts (where you are in the RFI procedure)

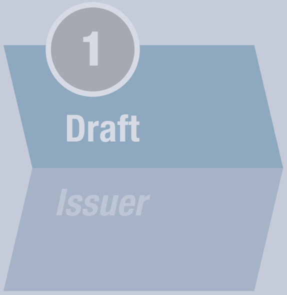
Save Information button



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.



1-2. Attach Related Data (optional)

To attach files to the RFI Draft (indicated by the red Draft header), select the **Add** button to the upper right of the **Attachments** field.

RFI Draft screen

process chart

Issue RFI command

Edit Field icon

Description from Create RFI screen

Add Attachments

Add Email Recipient

default Email Recipients

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.

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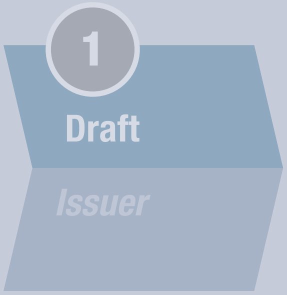


1-3. Add Additional Email Recipients (optional)

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

Select an Email Group

Add Group	Group Name

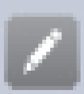
Select an Email Recipient from the Project Directory

Add Contact	Full name	Phone	Cell
☐	Architectural Firm – Bob Murphy		
☑	Architectural Firm – Jaime Smith		
☑	AV Subcontractor – Pat Jones		
☐	AV Subcontractor – Marc Evans		
☐	BuildRite Construction Mgmt. – Charlie White		
☐	Campus Owner – Nate Owens		

Save Information

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.



Edit Field icon

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* —

2

Issued

Issuer

1. Issue RFI to authorizer and relevant team members.

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:

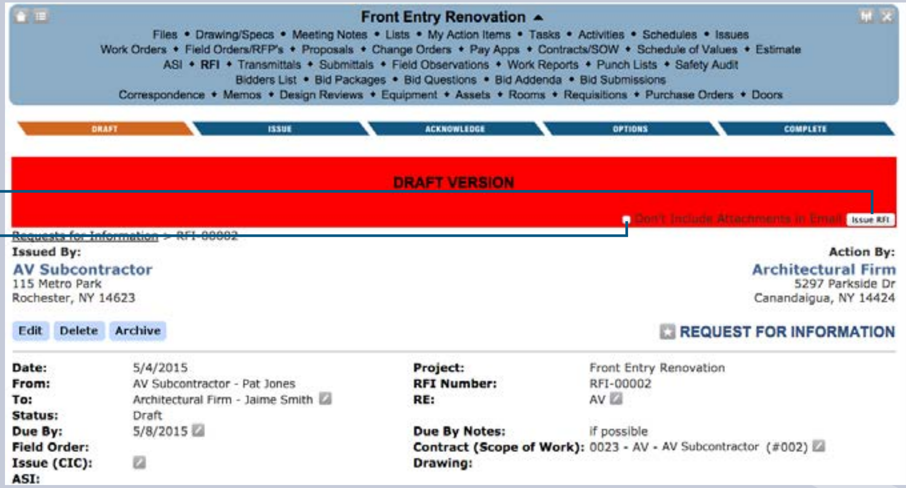
- Create a PDF of the issued RFI, and;
- Send an email to everyone on the Email Recipients list that includes any attachments.

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

Issue RFI command

Don’t Include Attachments in Email check box



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

Acknowledged

Recipient

1. Acknowledge RFI receipt.
2. *Re-direct to appropriate recipient.*

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　　**yellow** = 8-14 days

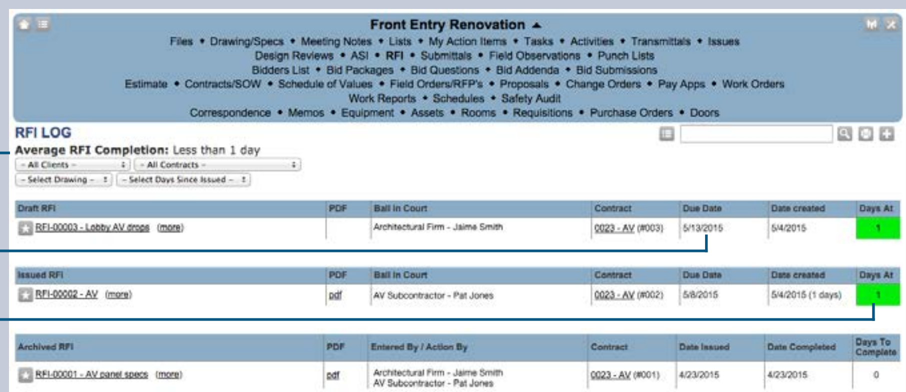
orange = 15 – 30 days　　**red** = 31+ days

RFI Log with sample entries

RFI Average Completion Time

Due Date

Days At color-coded entries



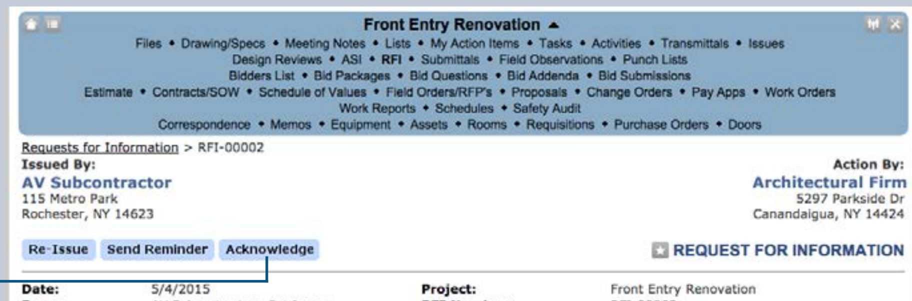
— continued —

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



Acknowledge button

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.

RFI screen

Edit icon

4

Options

All

1. Open for discussion.
2. Issue ASI.
3. Issue Field Order.
4. Request issuance of RFP.

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:

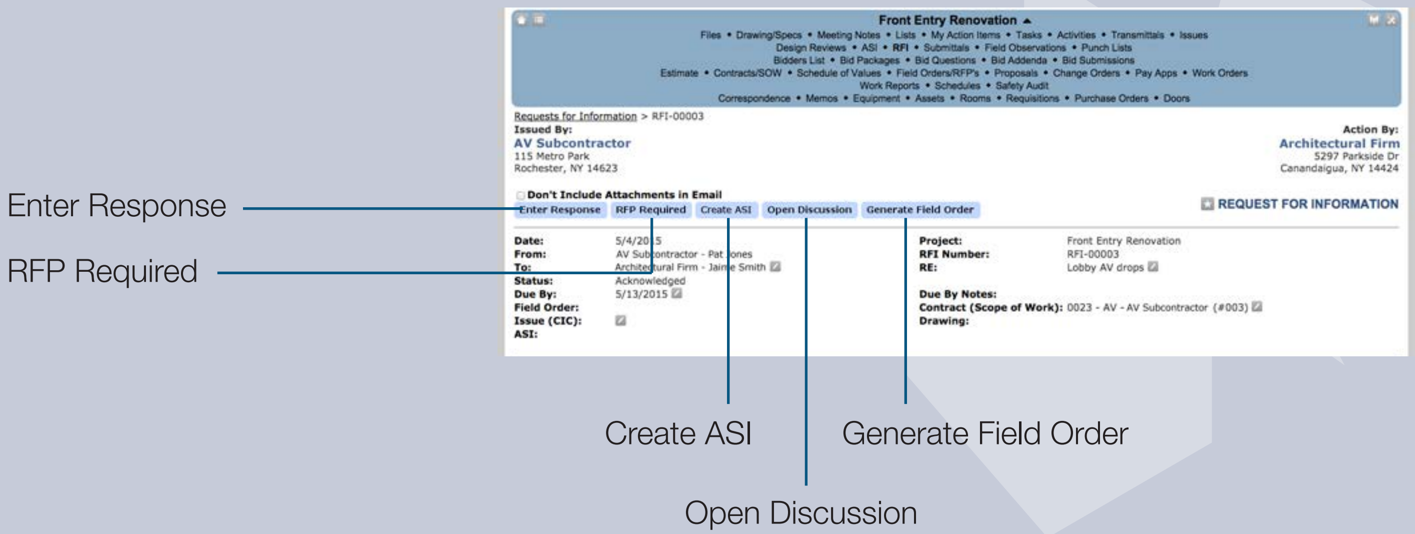
1. The primary Recipient can **Respond** to the RFI to provide the information requested. ***See pg. 13.***
2. The primary Recipient can **open the RFI for Discussion** among select email recipients. ***See pg. 14.***
3. The issuer of the RFI can send an open email to the appropriate team member (typically 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.***
5. 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

Options

All

Enter Response

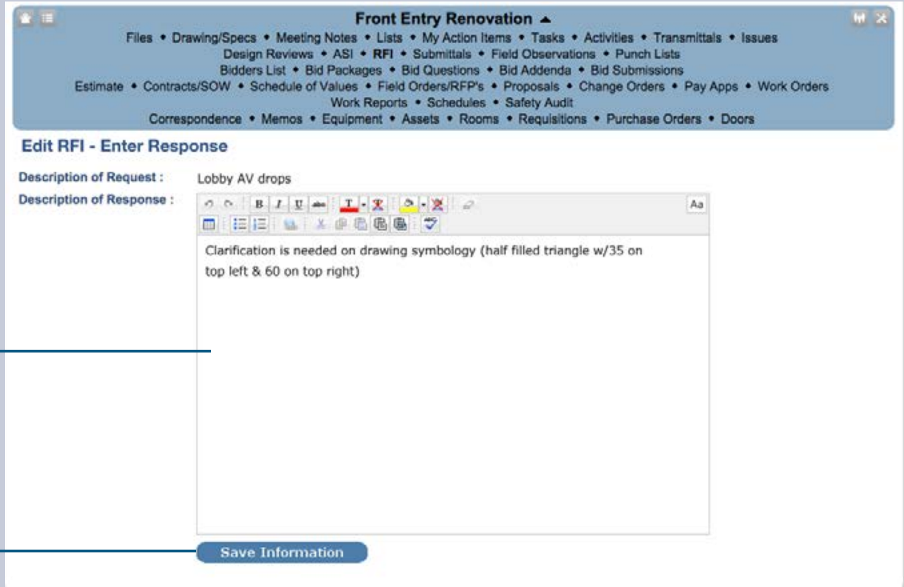
4-1. Enter Response

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

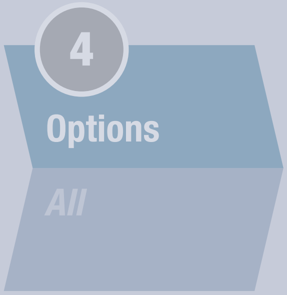


Description of Response text field

Save Information

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

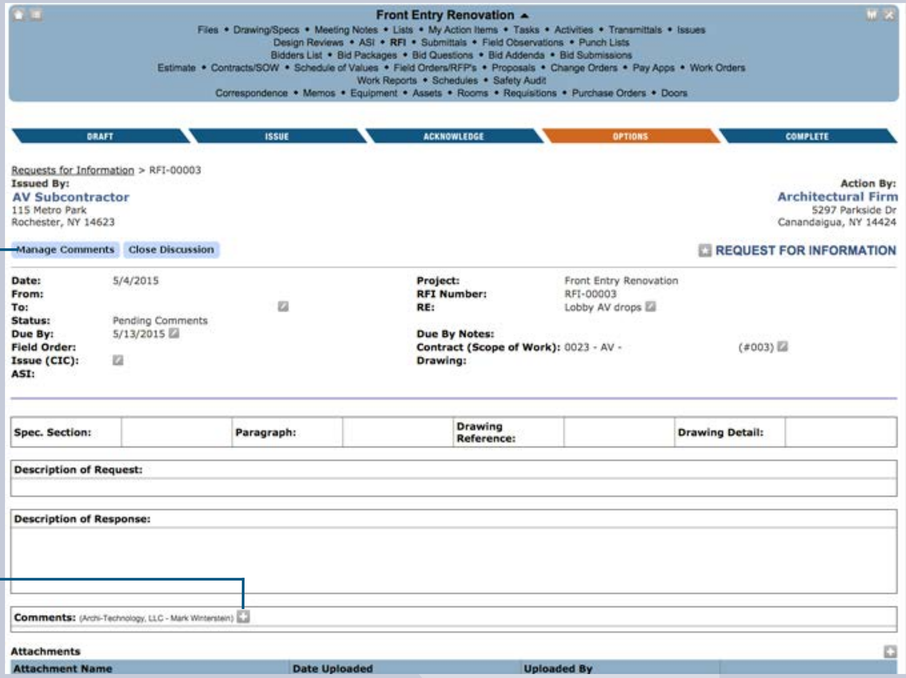
From the **RFI - Pending Comments** screen, select the **Manage Comments** command to display the *Edit RFI - Manage Comments* screen shown on the next page.

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

Manage Discussion

Add Comment icon



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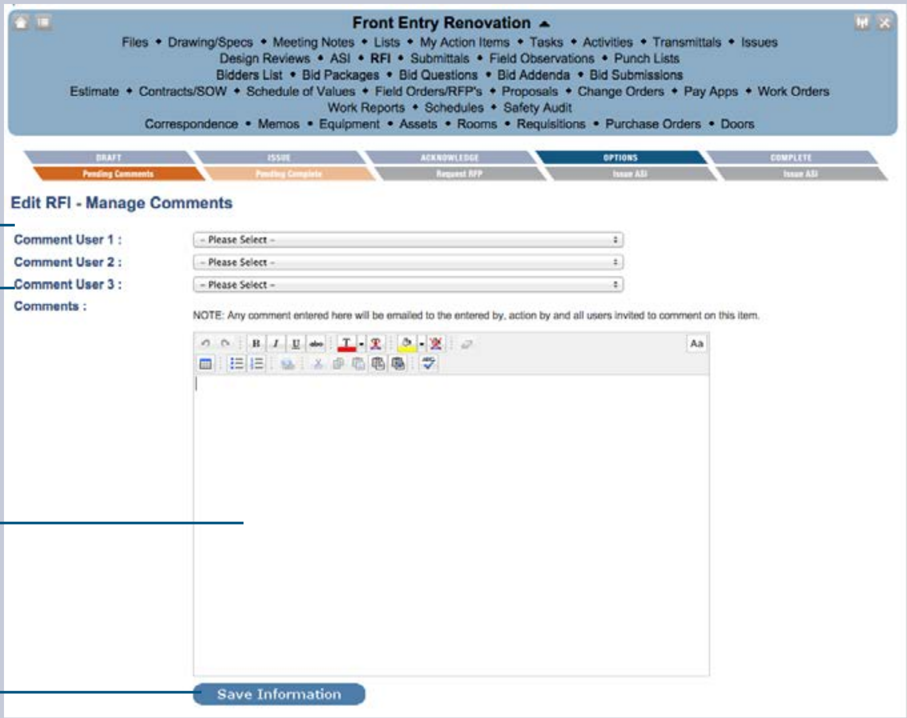
4

Options

All

Open a Discussion (cont.)

Edit RFI - Manage Discussion screen



Comment Users 1 – 3 *(in addition to primary Recipient and Issuer)*

Comments field

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 —

4
Options
All

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.

4

Options

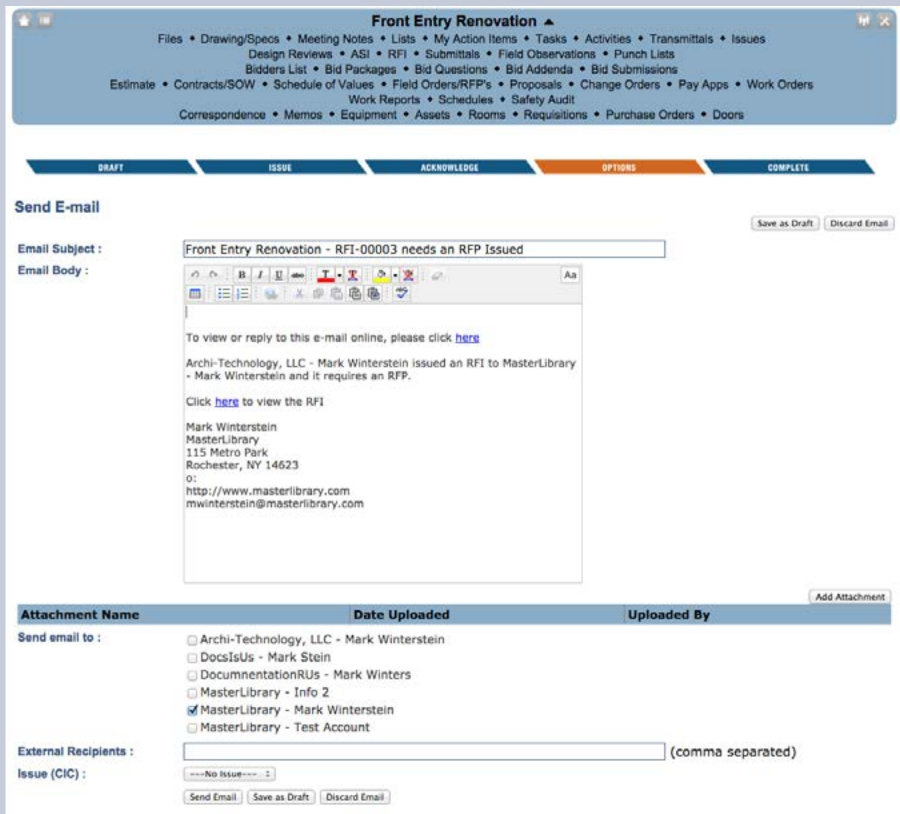
All

RFP Required

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 —

4
Options
All

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

Options

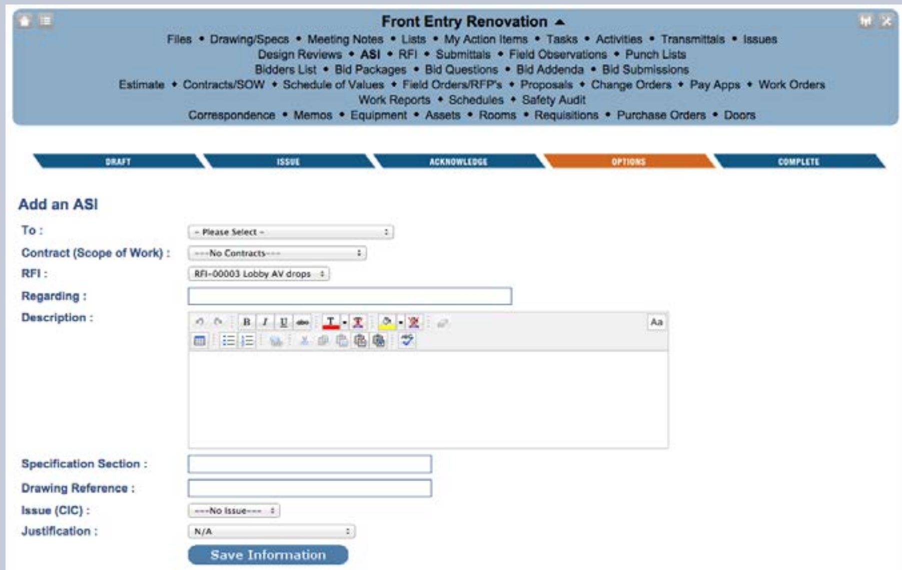
All

Create ASI

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



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.

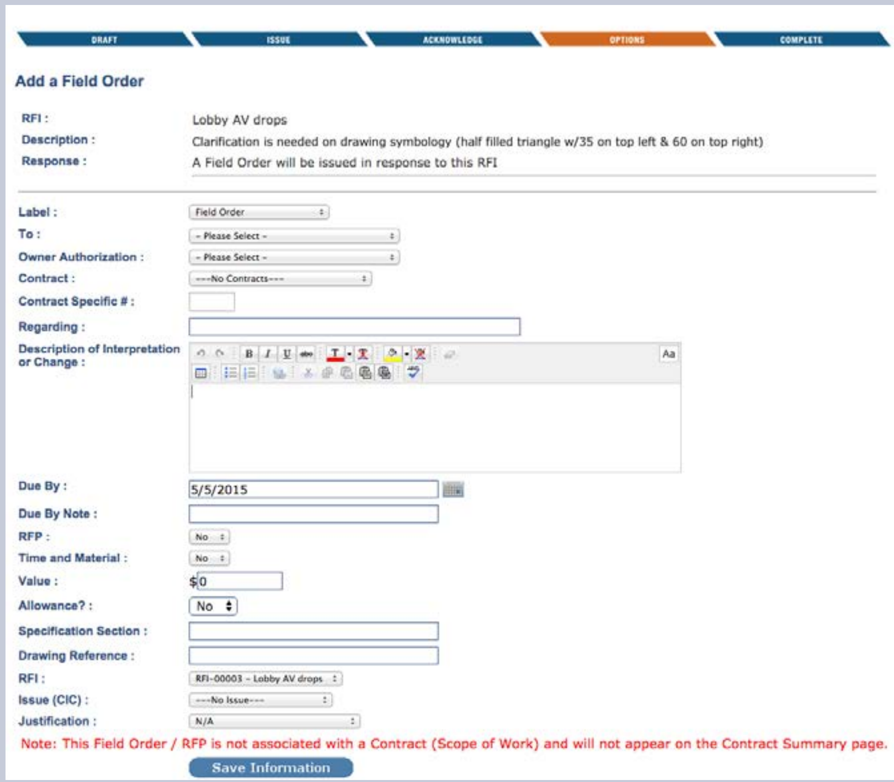
4
Options
All

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



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 —

4
Options
All

- **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

Recipient

1. Enter Response.
2. Mark as Complete.

Mark Complete

5. Completed

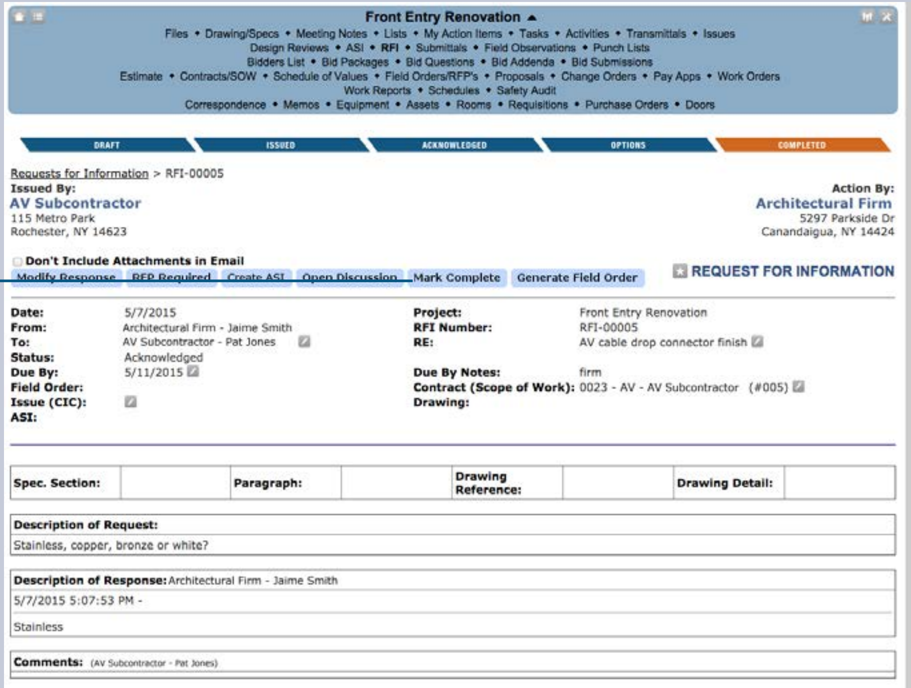
After the information requested in RFI has been provided via a posted comment or other means:

- 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



- 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.

Resources For Successful Implementation

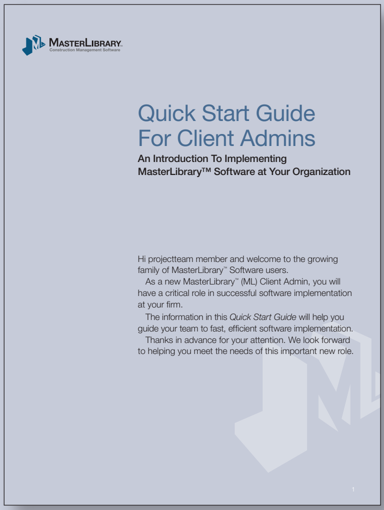

Quick Start Guide
For All Users
An Introduction To Implementing
MasterLibrary™ Software at Your Organization

Hi project team member, and welcome to the growing family of MasterLibrary™ Software users.

This *Quick Start* guide provides a brief overview of the **people, processes** and **paperwork** that will be automated by the software.

Please take a few minutes to read this guide **prior** to your first MasterLibrary™ training session so you and the rest of your team can hit the ground running.

Thanks in advance for your attention. We look forward to helping you reduce project admin times, while increasing accountability among all project team members.


Quick Start Guide
For Client Admins
An Introduction To Implementing
MasterLibrary™ Software at Your Organization

Hi projectteam member and welcome to the growing family of MasterLibrary™ Software users.

As a new MasterLibrary™ (ML) 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.

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 Request Additional Help 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.**


Help icon


New Features icon