



## eBuilder User Guide



### *Request for Information (RFI)*



*Submit Inquiries*

*Easy  
Responses*

*Collaboration*



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## Getting Started

The City of Miami strives to be a **Service City** every day by streamlining our internal processes; making it easier to register, pay, and receive city services. We introduce eBuilder, a project management system designed to make city requests for information easier, faster, and available from your home or office computer at any time.

### eBuilder User Guide Audience

This guide is intended for individuals who have a working knowledge of the City of Miami's project lifecycle.

### eBuilder Video Tutorials

Please visit the **City of Miami's Technology eLearning Hub** on YouTube or Vimeo. Click the links listed below or search for eBuilder on YouTube or Vimeo.

**Note:** The videos are forthcoming.

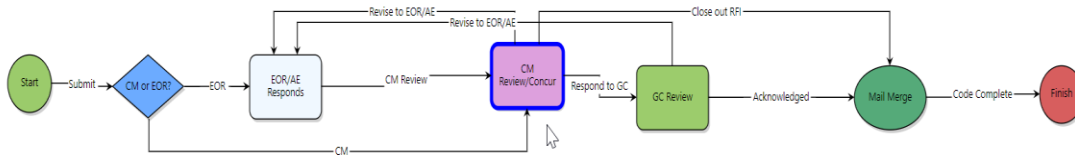
- **YouTube:**  
[https://youtu.be/Z4wy\\_9E4-MI](https://youtu.be/Z4wy_9E4-MI)

### eBuilder Technical Support

Please send eBuilder system questions or issues to the eBuilder Technical Support team:

Email: [ebuilder@miamigov.com](mailto:ebuilder@miamigov.com)

# REQUEST FOR INFORMATION (RFI) WORKFLOW



## Workflow

General inquiries about a particular project can be sent to the City of Miami or the Engineer of Record for review and response. These questions should be focused and specific in scope.

General contractors have the capability to obtain answers in a timely manner from the City of Miami or its representatives. We will assist in answering the most pertinent. Furthermore, it provides a historical trail for your reference.

Questions submitted in eBuilder by the Contractor are sent to the engineer of record/construction manager who responds in the system to the Contractor. If there are revisions or replies, supplementing documentation can be provided along with a response. A mail merge or formal response is sent once inquiry is completed.



## REQUEST FOR INFORMATION: ROLES AND PROCESS

### Purpose

Request for Information process enables contractors, to ask questions and obtain answers from the City of Miami or its representatives. With this technology, a professional can present documents for review and receive speedy responses.

### “Start Step” Contractors

1. The Contractor starts the RFI process in e-Builder. The contractor will have to enter details about their request for information such as title, priority, specification, and others.
2. Contractors will be able attach any supporting documentation associated with their request.
3. Once the Contractor has populated the required fields and information, the Contractor can take the action to **Submit** the RFI in the system.

### Engineer of Record / AE

1. The EOR/AE should document their response in the RFI Response field and select a value for **Responded By**.
2. The RFI Due Date will populate automatically 14 days after the RFI is submitted.
3. The EOR/AE may add any necessary documents on the Attached Documents tab.
4. Take the **CM Review** action and the process will route to the **CM Review/Concur step**.

## Construction Manager

The CM will review the request for information (RFI). If the RFI has been answered by the EOR/AE, then the Construction Manager may also review the EOR/AE response. The CM is required to ensure there is a response selected for **Responded By**. The CM may then advance the process by utilizing one of the following:

1. If **Revise to EOR/AE** action is selected, then the process will return to the EOR/AE for additional clarification or information. The Construction Manager will be required to leave a comment.
2. The Construction Manager can also **Respond to GC** and the process will move forward to the General Contractor with the response to the RFI.
3. The Construction Manager has also the option to take the action of **Close out RFI** which will send the Contractor the final answer to the RFI if needed. This will immediately advance to the **Mail Merge** and **Finish** steps to Close out the RFI and complete the process.

## General Contractor Review

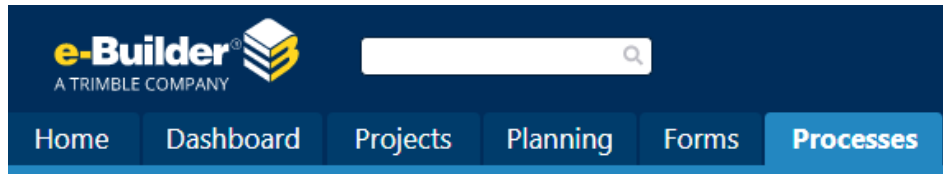
The General contractor will review the response submitted by the Construction Manager or the Engineer of Record. The following actions are available:

1. Take the **Acknowledged** action
  1. The process will route to the **Mail Merge** step to generate an RFI document.
  2. The process will automatically route to the **Finish** step, and the process will conclude.
2. Take the **Revise to Engineer of Record/AE action** and the process will return to the **EOR/AE** step for additional information or clarification. You will be required to leave a comment. The revision counter will increment each time the process returns to the **EOR/AE** step.

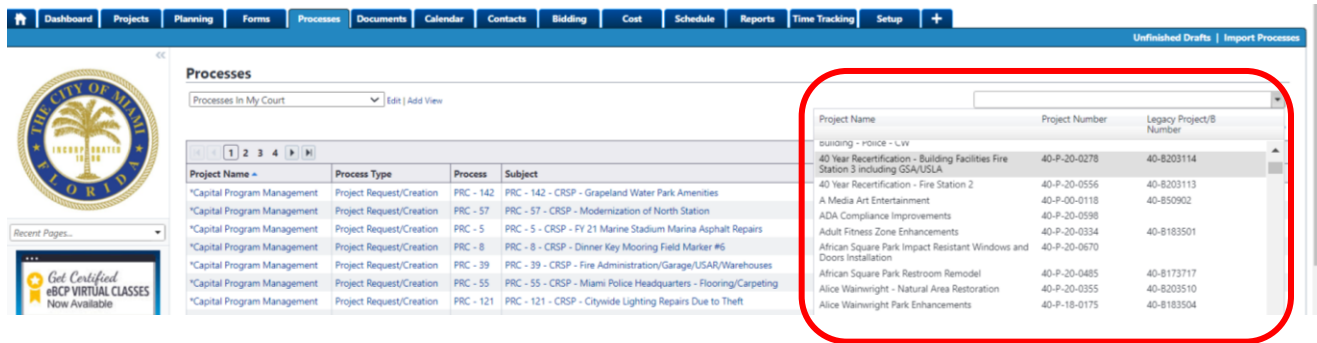
# Request for Information (RFI)

**Step 1:** The Contractor will Log in to eBuilder

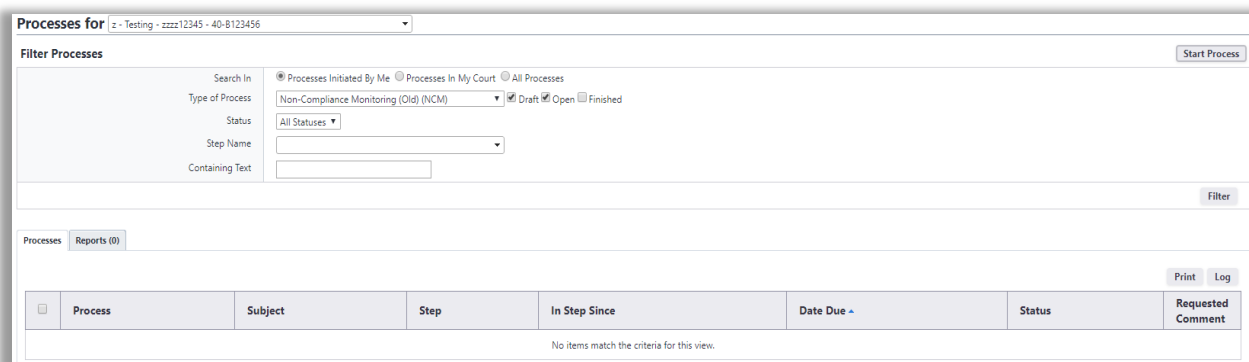
**Step 2:** Initiate the process by selecting the **Processes** tab.



**Step 3:** Select a desired project.



**Step 4:** Click **Start Process**.



**Step 5:** Select **Request for Information (RFI)**. The Contractor must fill in the required fields that are marked with a red asterisk in order to advance.

RFI (RFI)

Start Process Print Check Spelling Submit Save Draft Cancel

Project: ZUAT - Non-Cost Processes  
Project Number: ZZZZZ  
Process: RFI

Details Attached Documents (0) Attached Processes (0) Attached Forms (0)

Contractor's Request for Information

\* Title: Gym Light Fixtures  
Priority Level: Med  
Potential Cost Impact?: Yes  
Potential Schedule Impact?: No  
\* Response Requested From: Designer of Record  
\* Category: Clarification  
Specification Section(s): 121.555  
Drawing(s): 3309  
\* Information Requested: The plans do not specify the model # of light fixtures to be used for the gym lights

Scroll down in process to see all information

**Step 6:** Ensure that all documents, processes, and attached forms are included specifically in the Process Instance Tabs section and click Submit.

**Step 7:** If the Designer of Record is selected from the Response is Requested drop down, then the RFI is sent to the Engineer (EOR) for consideration. The following window will appear:

RFI (RFI) - 6 Delete Instance Workflow Override All Fields View Instructions

Accept Decline CM Review Take Action Check Spelling Print Copy Delegate Save Cancel

Project: z-External Testing  
Process Document: RFI - 6  
Current Workflow Step: EOR/AE Responds: Show Workflow Diagram  
Subject: Hurricane Impact Windows  
Status: Submitted

Project Number: TestExternal  
Overall Due Date:  
Step Due Date: 06.18.2020 02:21PM

Details Comments (0) Attached Documents (1) Attached Processes (0) Attached Forms (0) Attached To (0)

Contractor's Request for Information

Priority Level: Low  
Potential Cost Impact?: Yes  
Potential Schedule Impact?: Yes  
Response Requested From: Designer of Record  
Category: Field Condition  
Specification Section(s): 2.01  
Drawing(s): 12.1  
Information Requested: Required ABC windows. See contract for details. Are these required?  
Revision #:

RFI Response

\* RFI Response:  
Responded By: Please select...  
RFI Due Date: 06.18.2020

CM Review Take Action Check Spelling Print Copy Delegate Save Cancel



**Step 8:** If Capital Improvements department is selected from the Response is Requested drop down, then the RFI is sent to the Construction Manager for consideration. The following window will appear:

The screenshot shows the 'RFI (RFI) - 4' form. At the top, there are tabs for 'Delete Instance', 'Workflow Override', 'All Fields View', and 'Instructions'. Below these are buttons for 'Take Action', 'Check Spelling', 'Print', 'Copy', 'Delegate', 'Save', and 'Cancel'. The form is divided into several sections: 'Project' (z - External Testing), 'Process Document' (RFI - 4), 'Current Workflow Step' (CM Review/Concur), 'Subject' (Hurricane Impact Doors), and 'Status' (Submitted). The 'Contractor's Request for Information' section includes fields for Priority Level (Med), Potential Cost Impact (Yes), Potential Schedule Impact (Yes), Response Requested From (Designer of Record), Category (Conflict in Contract Document Requirements), and Information Requested (This is a test. Two different specs in contradiction). The 'RFI Response' section has a text area with 'Please See page 8-11', a 'Responded By' dropdown menu with 'Eileen Carrera' selected, and a 'Responded By Date' field with '06.18.2020'. A blue instruction bar at the bottom of the response section reads: 'Instructions: Please select the "Close out RFI" action if this response is intended to be final, and does not require additional review from the General Contractor.'

**Step 9:** In order to submit the response, the CM will select either **Respond to GC**, **Revise to EOR**, or **Close Out RFI** from the drop-down menu. For the process to move forward, select any option and click **Take Action**.

This screenshot is similar to the previous one but shows the 'Take Action' dropdown menu open. The menu options are: 'Please select an action --', 'Respond to GC', 'Revise to EOR/A', and 'Close out RFI'. The 'Revise to EOR/A' option is highlighted in blue. The rest of the form content remains the same as in the previous screenshot.

- If the EOR/AE selects **Respond to GC**, the information is sent via mail merge to the Contractor.
- Only the CM can send the request back to the EOR with the **Revise to EOR** option. This provides the EOR an opportunity to confer with the construction manager.
- If the **Close Out RFI** option is selected, then the CM ends the process with the final decision/response determined.

**Step 10:** When the General Contractor (GC) receives the response to the RFI, the GC can take the action to **Acknowledge** the RFI response which will create the mail merge and formal response and end the process. The GC can also take the action of **Revise to EOR** if additional information is needed. This **Revise to EOR** action will send back the RFI to the Engineer of Record with additional comments. The revision will start the clock of the RFI due date once again.

The screenshot displays the eBuilder interface for a Contractor's Request for Information (RFI). At the top, there is a navigation bar with buttons: 'Take Action', 'Check Spelling', 'Print', 'Copy', 'Delegate', 'Save', and 'Cancel'. A dropdown menu is open over the 'Take Action' button, showing options: 'Acknowledge', 'Revise to EOR', and 'Close Out RFI'. The 'Acknowledge' option is highlighted in blue.

Below the navigation bar, the RFI details are shown in a table-like format:

Project:	z - Training Project	Project Number:	*zz training 123
Process Document:	RFI - 1 <a href="#">Show History</a>   <a href="#">Current</a>	Overall Due Date:	
Current Workflow Step:	GC Review <a href="#">Show Workflow</a>	Step Due Date:	
Subject:	Test		
Status:	Submitted		

Below the details, there are tabs for 'Details', 'Comments (0)', 'Attached Documents (0)', 'Attached Processes (0)', 'Attached Forms (0)', and 'Attached To (0)'. The 'Details' tab is active, showing the following information:

**Contractor's Request for Information**

Priority Level:	Low
Potential Cost Impact?:	No
Potential Schedule Impact?:	No
Response Requested From:	City of Miami Capital Improvements
Category:	Clarification
Specification Section(s):	8001.22
Drawing(s):	A-20
Information Requested:	Testing
Revision #:	

**RFI Response**

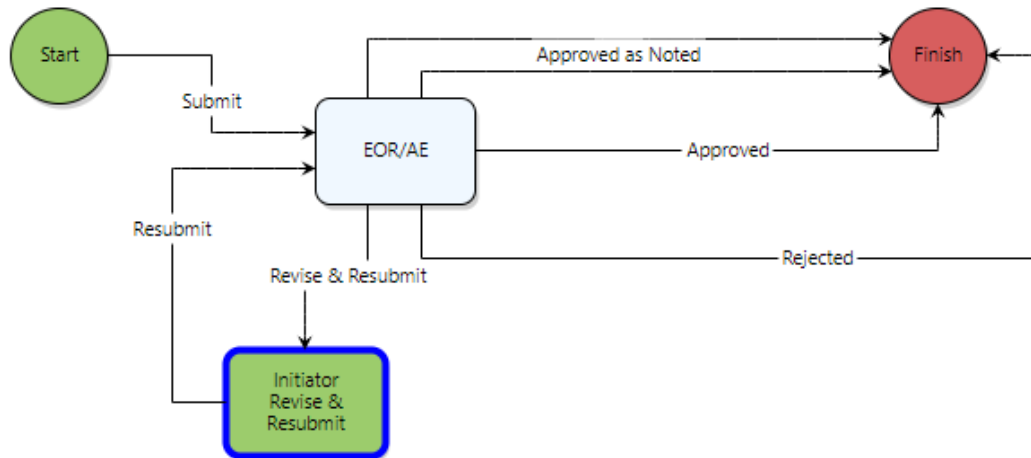
RFI Response:	Response
Responded By:	Suarez, Jimmy
Responded By Date:	07.31.2020
RFI Due Date:	08.14.2020

### Process Headers Explained

The purpose of this is to demonstrate how to navigate within the process. **Show History** will delineate each step and their corresponding time and actor who changed/added to process. **Current Actors** will list all relevant project members.

Project:	z - External Testing	Project Number:	TestExternal
Process Document:	CS - 1 <a href="#">Show History</a>   <a href="#">Current Actors</a>	Overall Due Date:	
Current Workflow Step:	Initiator Revise & Resubmit <a href="#">Show Workflow Diagram</a>	Step Due Date:	
Subject:	CS - 1 - Remodel Dining Room- 7/19/2020 6:10:57 PM		
Status:	Submitted		

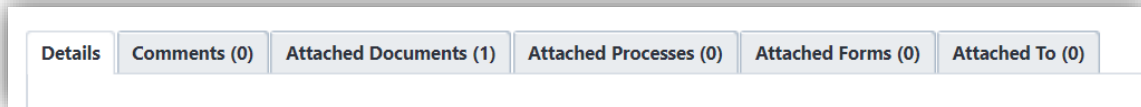
More importantly, the **Current Workflow Step** will demonstrate the current step in which the process resides. The workflow will display the entire process with the current step highlighted in blue.



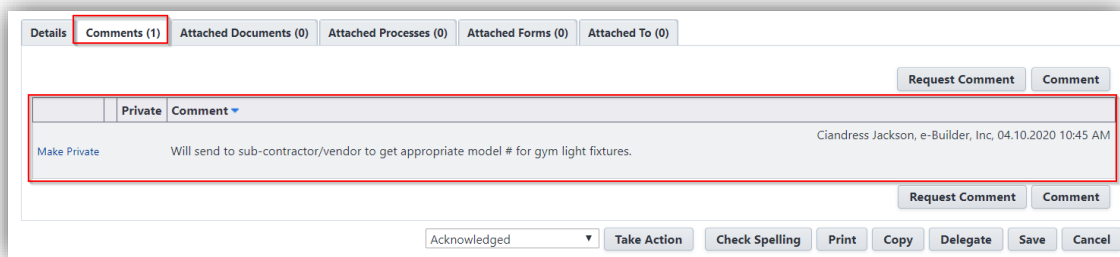
Ensure that all documents, processes, and attached forms are included specifically in the Process Instance Tabs section.

## Process Instance Tabs

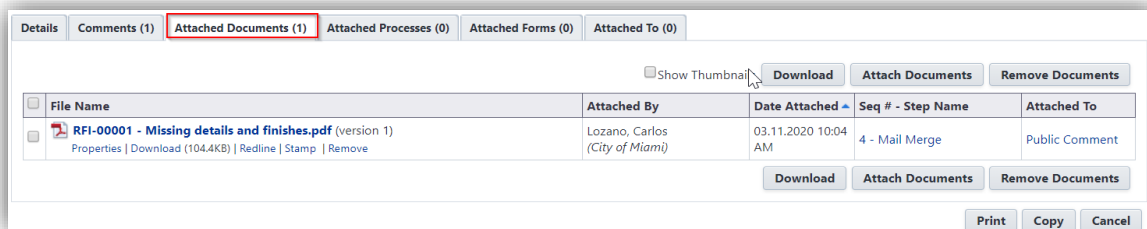
Various tabs allow you to provide substantiating documentation if needed.



**Comments:** Actor may request internal/external comments and/or leave their own comments. Comments are saved and can be reviewed later.



**Attached Documents:** Actor may upload documents to attach from their computer or select a file from within the document structure of the current project.

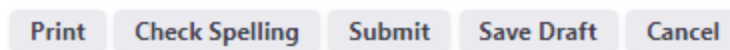


**Attached Processes:** Displays process instances that have been attached by the current or previous actor(s).

**Attached Forms:** Displays Forms that have been attached by the current or previous actor(s).

**Attached To:** Displays where the current process instance is attached within the system.

**Step 1:** Select one of the following options:



**Step 2:** Once reviewed for accuracy, click **Submit**.