eBuilder User Guide

Request for Information (RFI)

Submit Inquiries | *Easy Responses* | *Collaboration*

Getting Started **3**
eBuilder User Guide Audience 3
eBuilder Video Tutorials 3
eBuilder Technical Support 3
Workflow **4**
Purpose **5**
"Start Step" Contractors 5
Engineer of Record / AE 5
Construction Manager 6
General Contractor Review 6
Request for Information (RFI) **7**
Process Headers Explained 11
Process Instance Tabs 12

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.

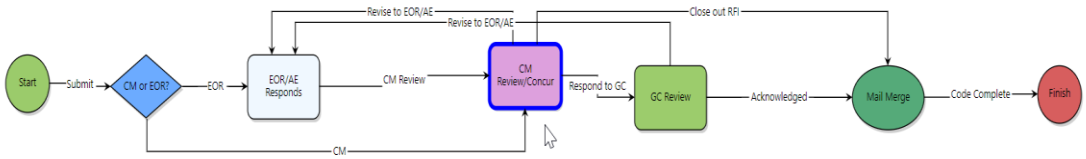
- **YouTube**:
  https://youtu.be/Z4wy_9E4-MI

eBuilder Technical Support

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

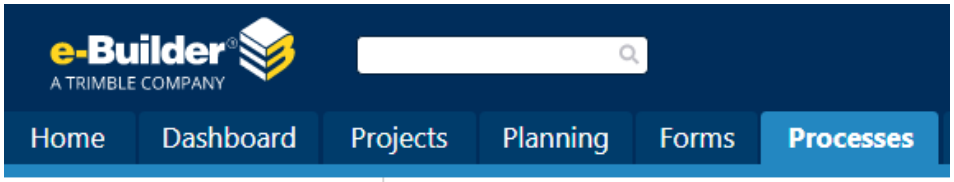
The General contractor will review the response submitted by the Construction Manager or the Engineer of Record. The following actions are available:

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.

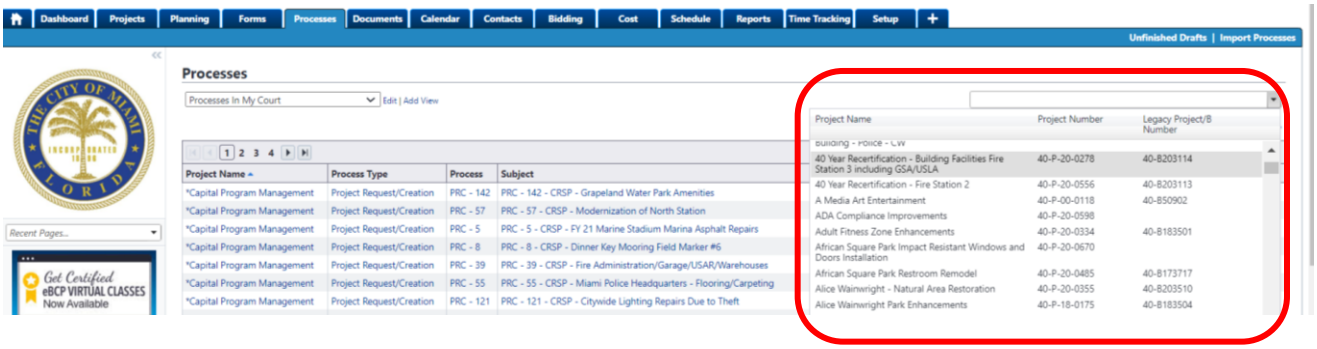
Request for Information (RFI)

Step 1: The Contractor will Log in to eBuilder

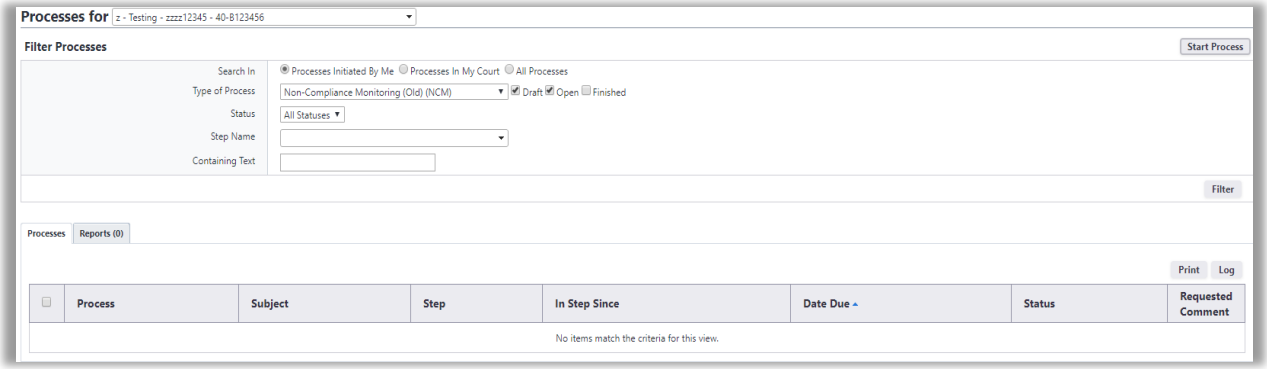
Step 2: Initiate the process by selecting the **Processes** tab.



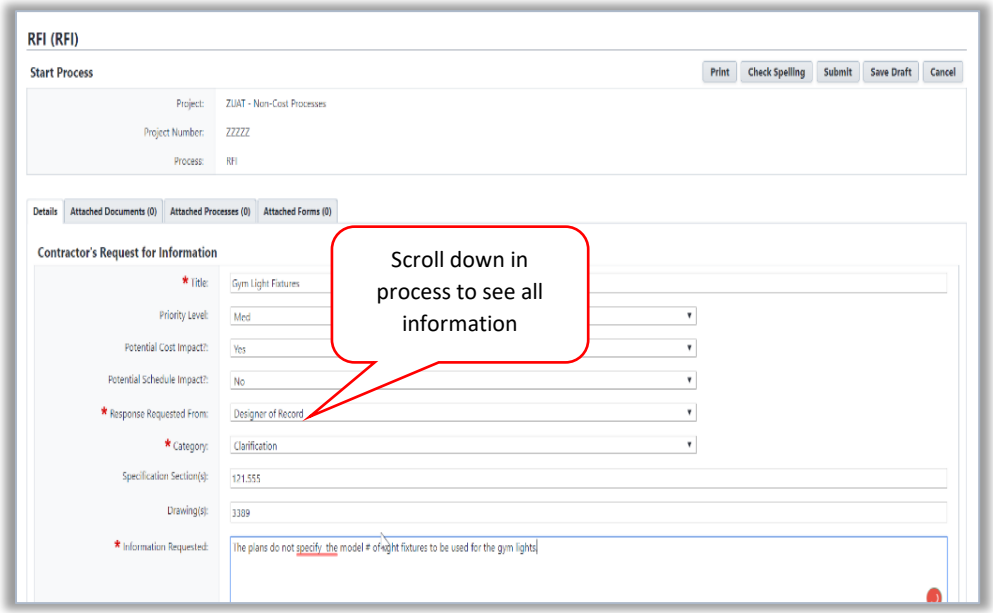
Step 3: Select a desired project.



Step 4: Click **Start Process**.

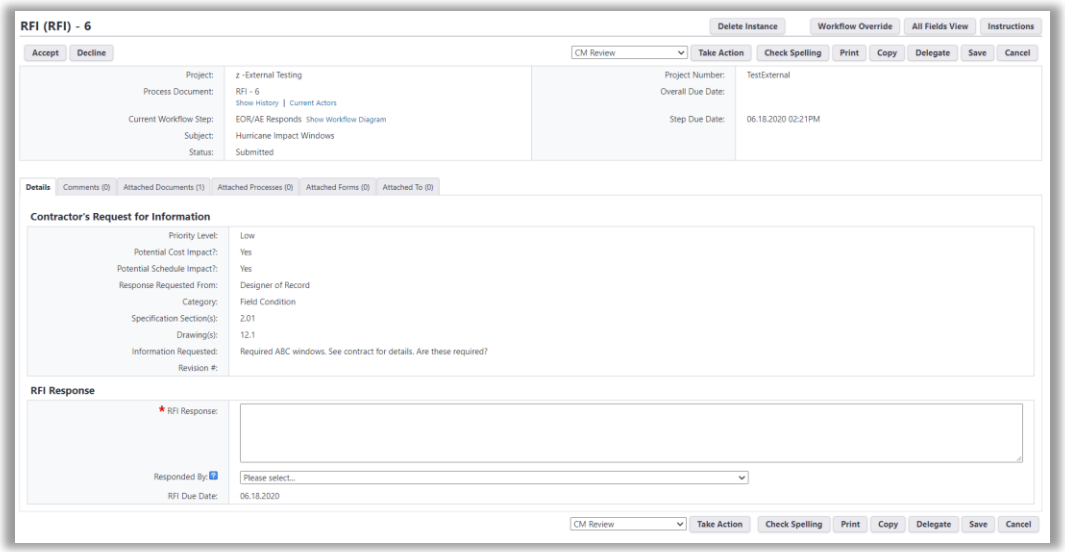


Step 5: Select **Request for Information (RFI)**. The Contractor must fill in the required fields that are marked with a red asterisk in order to advance.

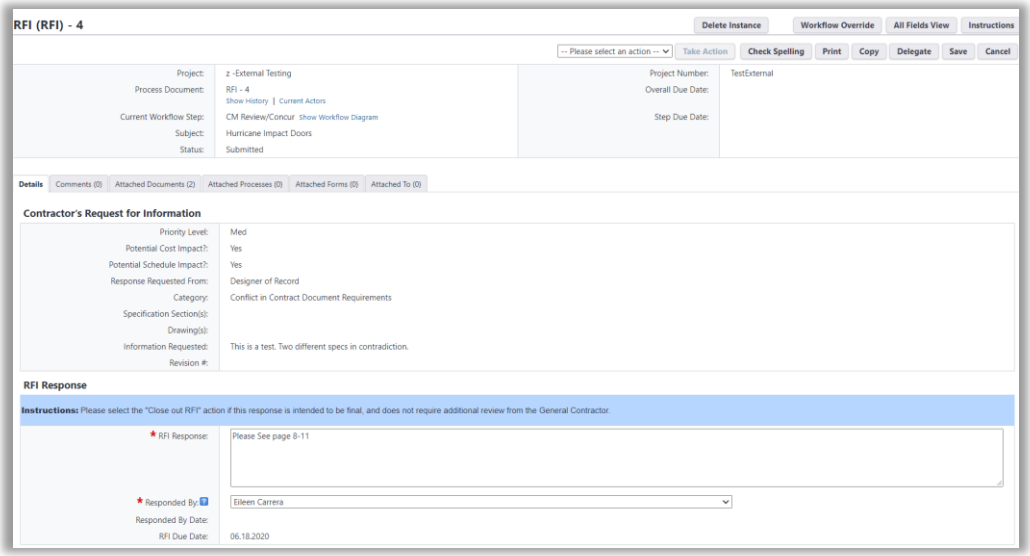


Step 6: Ensure that all documents, processes, and attached forms are included specifically in the Process Instance Tabs section and click Submit.

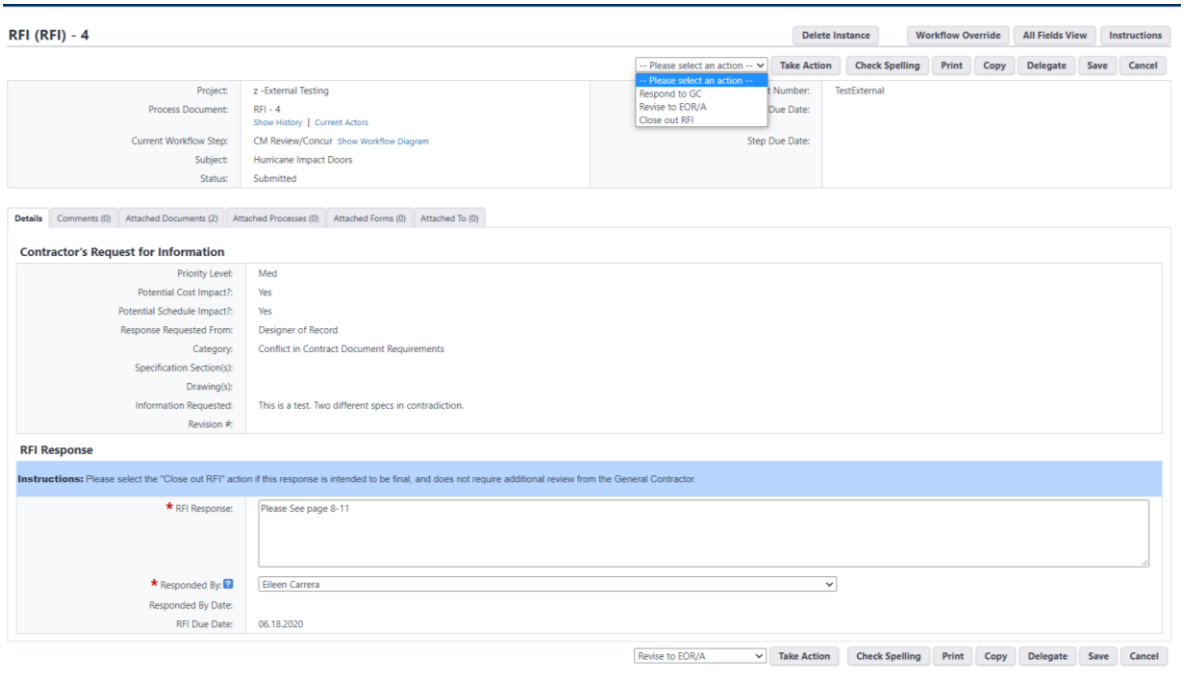
Step 7: If the Designer of Record is selected from the Response is Requested drop down, then the RFI is sent to the Engineer (EOR) for consideration. The following window will appear:



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:

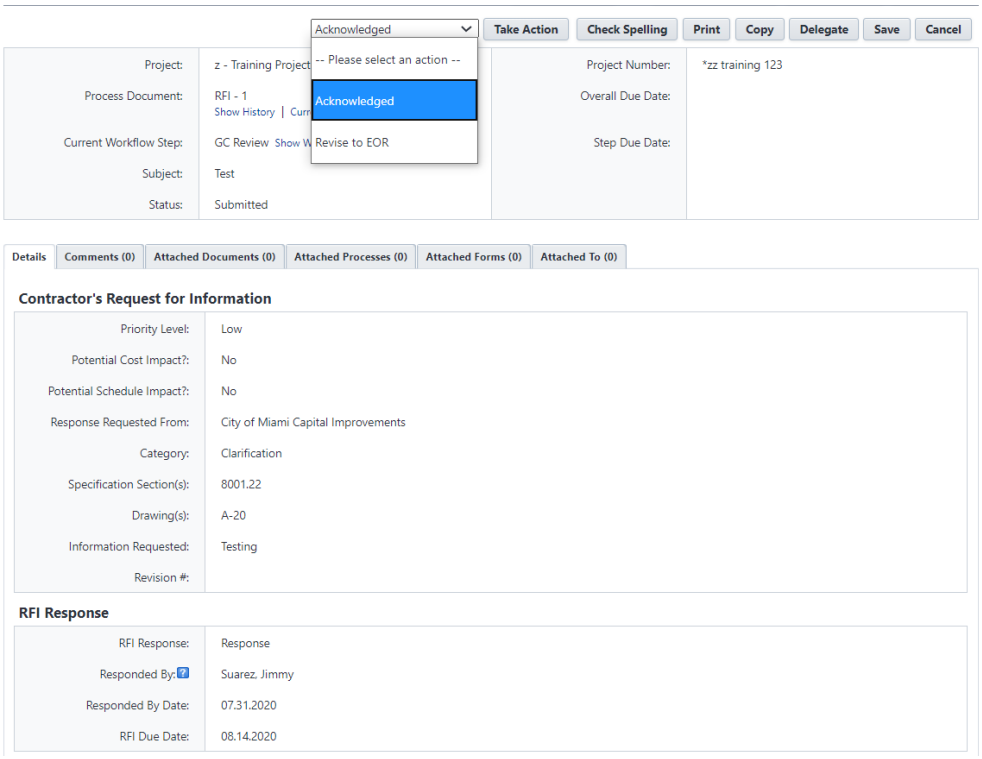


Step 9: In order to submit the response, the CM will select either **Respond to GC**, **Revise to EOR**, or **Close Out RFI** from the drop-down menu. For the process to move forward, select any option and click **Take Action.**



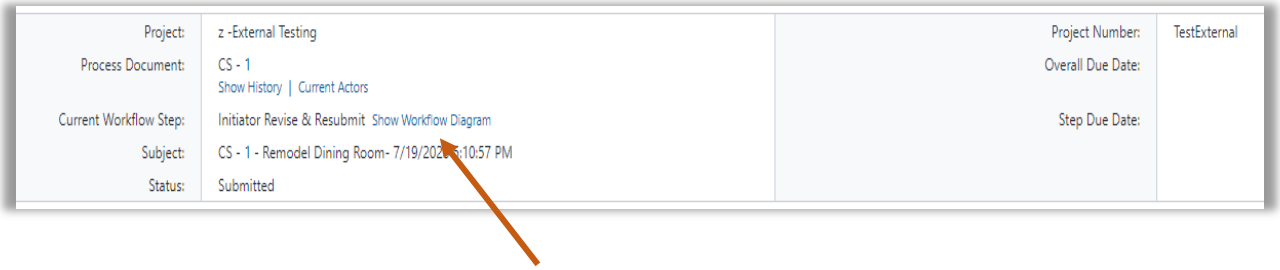
- If the EOR/AE selects **Respond to GC**, the information is sent via mail merge to the Contractor.
- Only the CM can send the request back to the EOR with the **Revise to EOR** option. This provides the EOR an opportunity to confer with the construction manager.
- If the **Close Out RFI** option is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

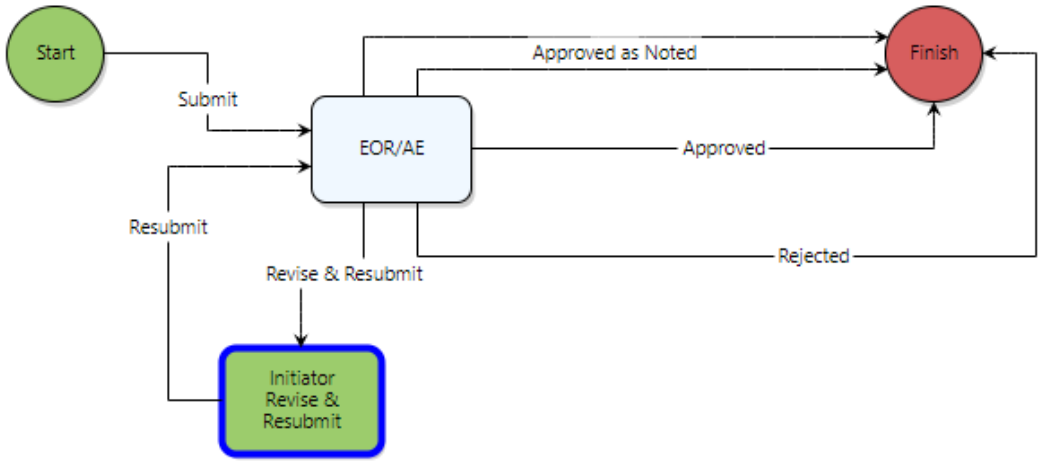


Process Headers Explained

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.



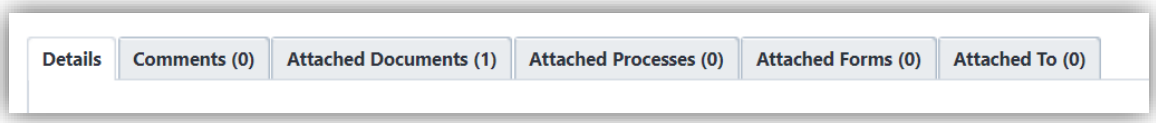
More importantly, the **Current Workflow Step** will demonstrate the current step in which the process resides. The workflow will display the entire process with the current step highlighted in blue.



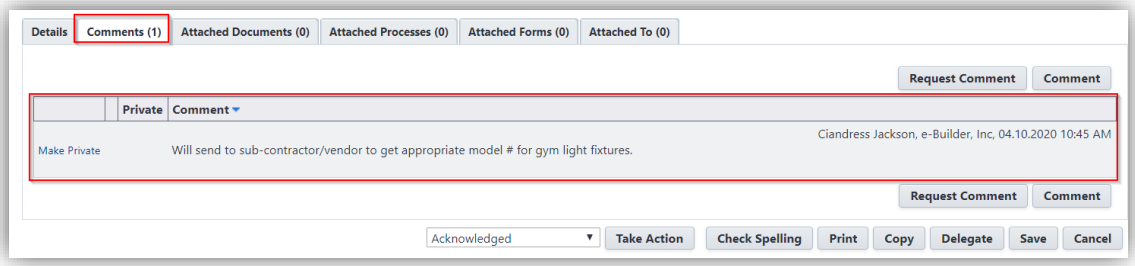
Ensure that all documents, processes, and attached forms are included specifically in the Process Instance Tabs section.

Process Instance Tabs

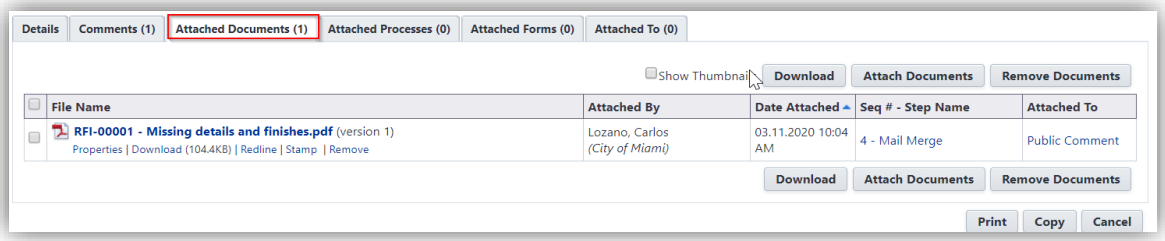
Various tabs allow you to provide substantiating documentation if needed.



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.

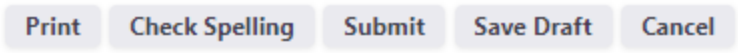


Attached Processes: Displays process instances that have been attached by the current or previous actor(s).

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**.