

User Guide for Inspectors View an RFI

Design and Construction Management uses the Spitfire Project Management System (sfPMS). This guide provides the steps you will need to view an RFI.

If you need help or have any questions, please send an email to:

cpmahelp@ucdavis.edu



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Getting Started

This documents how to view an RFI for Inspectors. This document assumes that the Inspector's:

• Have been assigned login accounts and have logged into the Spitfire system at scm.ucdavis.edu

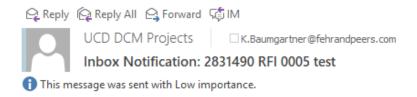
What do you do if you haven't been assigned login accounts? Refer to the Login User Guide.

You will receive a notification when the RFI has been responded to and closed. If you want to look at closed RFI's, this guide will provide you the steps to do so.

Also, this guide will provide you the steps to look at RFI's in other statuses as well.

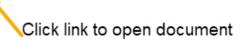
View an RFI from your email

To view an RFI directly from your email - you may click the link in the email you received notifying you of the RFI, this link will take you directly to the document.



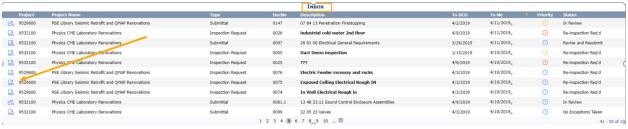
RFI # 0005 (test) for the 2831490 project has been routed to you and requires attention.

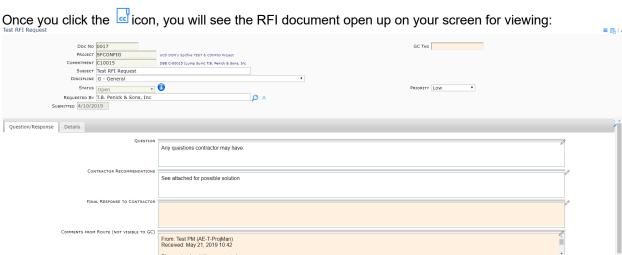
Ref: https://scm.ucdavis.edu/sfpms/go.aspx/doc/ea9a0379-07f9-408a-9322-ad2ca8821346



View an RFI from your Inbox

To view an RFI document directly from your inbox, from your home dashboard, you will see your inbox and all of the documents awaiting your attention including RFI's. For an RFI you will get a cc copy once it has been responded to and closed. From your inbox click on the circum to open the document.





View an RFI from your Home Dashboard

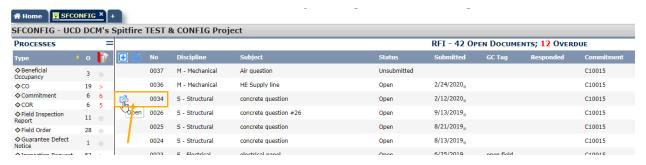
Alternatively you can view the RFI document for a specific project from your Home Dashboard. To view, from your Home Dashboard, select the project you want from the Project List, you can do so by clicking the site photo or project name in the Project List task bar.



Once you click on the site photo or project name your Project Dashboard will open. If your Project Dashboard doesn't default to RFI Request, you will want to select the RFI document in the processes type area:

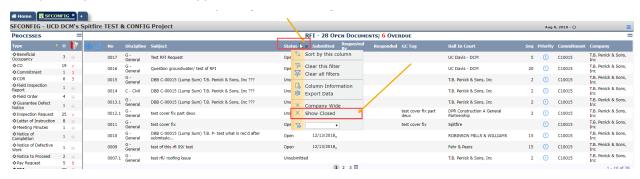


To view an RFI document you will click on the dicon:

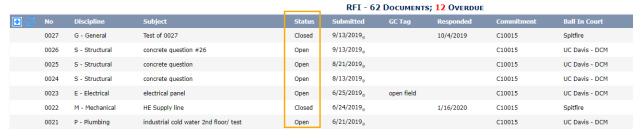


Filter for closed RFI's

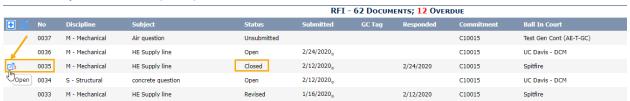
To filter for a closed RFI document, go to your project dashboard and make sure you are on the RFI in the processes type area. To use the filter, click near the column name 'status' to get the icon (it's very small), a drop down menu will appear, select the icon to show closed.

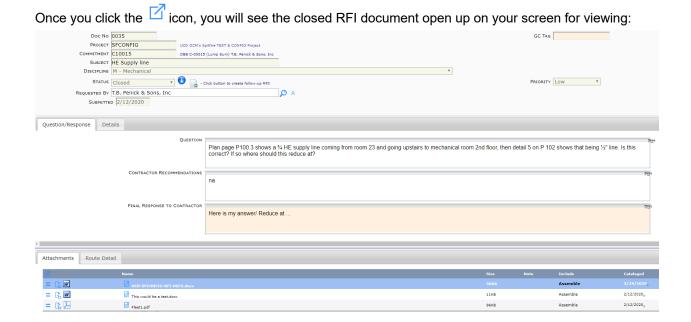


Once you select show closed, your project dashboard will refresh and the closed status documents will also appear



Click on any icon to open up the closed document:

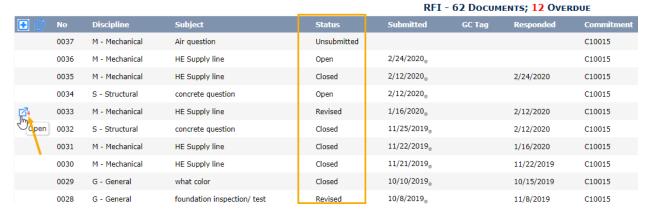


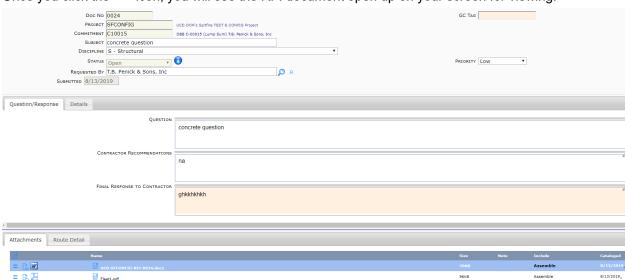


View RFI in other statuses (Open & Unsubmitted)

To view an RFI in open and unsubmitted statuses, go to your Project Dashboard and make sure you are on the RFI in the processes type area. Look at the status column to see the statues, click on any color

 $^{
m I}$ icon to open up the document:





Once you click the \square icon, you will see the RFI document open up on your screen for viewing:

View RFI in other statuses (Revised & Voided)

To view an RFI in revised or voided statuses, go to your Project Dashboard and make sure you are on the RFI in the processes type area.

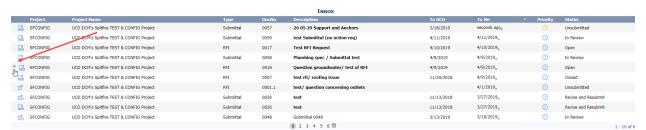
To filter for a closed RFI document, go to your project dashboard and make sure you are on the RFI in the processes type area. To use the filter, click near the column name 'status' to get the icon (it's very small), a drop down menu will appear, select the drop down menu next to the icon and select which status you want to filter for:



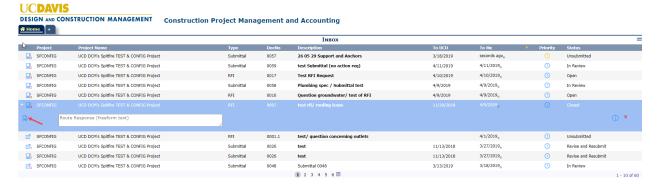
Clear Inbox of documents

Documents with the icon are waiting for action on your part. Once acted on, they will leave the InBox. Documents CC'd to you appear in your inbox when the document is first received and again when a response has been sent. Click the icon to open the document. Once you have viewed the document, if you would like to remove it from your inbox, you may do so by following these steps:

Click the Vicon next to the CC in your Inbox (you will have to place your curser over it to see it):



Once you click the Vicon next to the CC in your Inbox, the data will expand with a blue background, click the second icon to acknowledge and remove from your Inbox:



Download final RFI document

If you need to download the final RFI response, go to the Attachments Tab on the closed document and download the document with a title that follows this convention:

UCD-ProjectNo-DocType-DocNo-Status, for instance:

UCD-9501234-RFI-0001-CLOS

To download, click the document format icon, the document will open and you can save it.



That's it.....you've completed viewing an RFI!