

REQUEST FOR INFORMATION (RFI)

Oracle Unifier Business Process User Guide



Table of Contents

1. Business Process Overview	2
1.1 Understanding Requests for Information	2
1.2 User Groups & Permissions	2
1.3 Business Process Flow	3
1.3.1 Internal Workflow Overview	3
1.3.2 External Workflow Overview	4
1.4 RFI Form Explained	6
2. Step-by-Step Instructions	8
2.1 Internal Request for Information Workflows	8
2.1.1 Create Internal Requests for Information (RFI)	8
2.1.2 Perform Review of Internal RFI	12
2.1.3 Perform Technical Review of Internal RFI	16
2.1.4 Clarify Internal RFI	20
2.1.5 Confirm Internal RFI	22
2.2 External Request for Information Workflows	24
2.2.1 Create External Requests for Information (RFI)	25
2.2.2 Perform Review of External RFI	30
2.2.3 Clarify External RFI	32
2.2.4 Confirm External RFI	35
2.3 Related Business Processes	37
2.4 BP & Document Manager	37
3. Business Unit Guidance	39
4. Appendix	39
4.1 Getting Help & Support	39
4.2 Glossary of Terms	39
4.3 Abbreviations and Acronyms	39
4.4 Frequently Asked Questions	39



1. Business Process Overview

Shell Level	Project Level
Workflow	Yes
Connected BPs	Risks Issues Action Items Design Change Notice
Partner Access	Yes

1.1 Understanding Requests for Information

The Request for Information (RFI) process is a vital communication tool used by both external contractors/engineers and internal Southern Company employees to ask questions or seek clarification on project details. When someone submits an RFI, they are making sure that everyone involved in the project is on the same page about the scope of work, project specifications, and design requirements.

The RFI process is essential to keeping the project on track, ensuring it is completed on time, within budget, and meets the required quality standards.

Using the RFI process within Oracle Unifier offers several advantages. It helps gather all necessary information, identifies qualified vendors, manages risks, negotiates pricing and terms, ensures transparency and compliance, supports better decision-making, and fosters strong vendor relationships.

There are two RFI workflows: Internal and External. The workflow refers to the RECIPIENT of the request. Internal Workflow is for sending an RFI to an All Project User. External Workflow for sending the RFI to a Partner User.

1.2 User Groups & Permissions

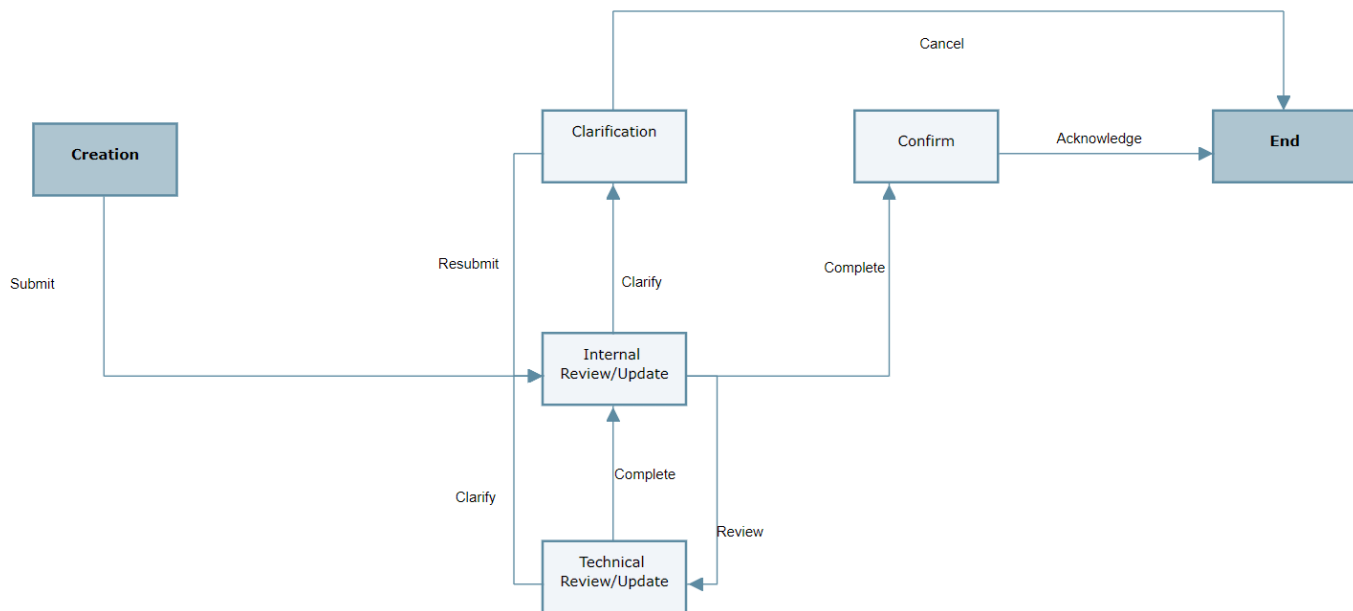
Role	Permissions	Shell Level
All Project Users	Authorized to create, review, and revise records, and receive notifications for both Internal and External Workflows.	Project Level Shell
Partner Users	Authorized to create records only for Internal Workflow. Review only for External Workflow and receive notifications from their company.	Project Level Shell



1.3 Business Process Flow

The Request for Information (RFI) business process is designed to facilitate clear communication and collaboration among project stakeholders by streamlining the submission, review, and resolution of inquiries. This section provides an overview of the RFI workflow, detailing the steps involved from the creation of a request through to its completion. Each workflow is tailored to ensure that both internal and external users can effectively engage with the process, whether they are seeking clarification or providing answers. The following graphic workflows illustrate the key stages and actions within both the Internal and External RFI workflows, helping users navigate each step with ease.

1.3.1 Internal Workflow Overview

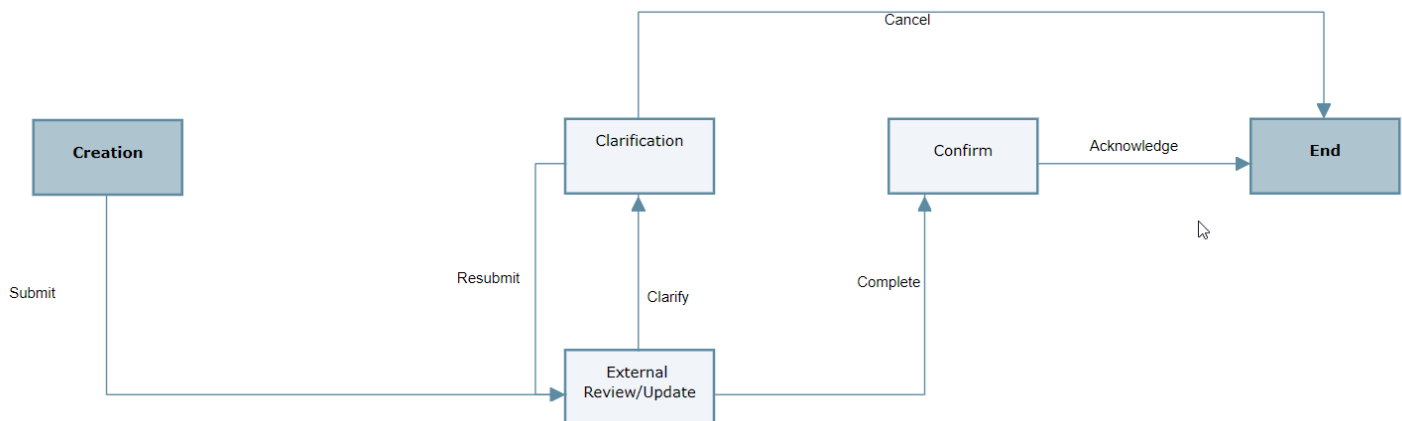


Workflow Step	Summary
Create	If the Initiator is an All Project User and not a Partner User, they can select 1 out of 2 workflows from the RFI BP. The Initiator chooses the Internal WF. Note: If the Initiator is a Partner User (Contractor or Engineer), when they click “Create” they will not have a WF option to select, it will default to the Internal WF
Internal Review/Update	The assigned reviewer evaluates the RFI and decides the next course of action. They can choose to Complete the request by addressing it, ask for Clarification if more information is needed, send it for Review by another party, or Cancel the request if it is no longer relevant.
Clarification	If the reviewer needs additional information or finds the request unclear, they will send it back to the Initiator, asking for further clarification. The Initiator then updates the RFI with the requested details before resubmitting it for review.
Review	In cases where the reviewer requires more technical information to form a complete answer, they can request additional Technical Reviews from other team members to provide the necessary expertise or input.
Resubmit	After receiving comments or clarification requests, the Initiator revises the RFI and resubmits it for further review. This ensures the request is updated with the necessary details or responses.
Technical Review/Update	The RFI undergoes further technical review, during which the reviewer evaluates all gathered input and decides on how to proceed. They can either request Clarification again if the information is still insufficient or Complete the RFI if all required information is available.



Complete	At this step, the reviewer confirms that all the necessary information has been provided, and the RFI is marked as complete. This signifies that the request has been fully addressed and no further action is required.
Cancel	The reviewer or Initiator can choose to cancel the RFI if it is determined to be unnecessary, irrelevant, or a duplicate of another request. A cancellation reason is provided for documentation purposes.
Confirm	Once the RFI is resolved, the Initiator is notified of the outcome and must Confirm that they have received the response. This step acknowledges that the inquiry has been successfully addressed.
Acknowledge	The Initiator formally acknowledges that the RFI has been completed, and all necessary information has been provided. This step ensures that the RFI process is documented as finished.
End	The RFI process concludes at this step. The request is marked as Complete, and no further action is needed. The record is routed back to the reviewer for final documentation.

1.3.2 External Workflow Overview



Workflow Step	Summary
Create	At this step, the Initiator, who is an All Project User, begins the process by selecting one of two available workflows (Internal or External) from the RFI business process (BP). Once the External Workflow is chosen, the RFI is prepared for submission by entering key details about the request.
External Review/Update	In this step, the designated reviewer examines the submitted RFI to determine the best course of action. The reviewer can either Complete the request by providing all necessary information or request Clarification if additional details are needed to address the inquiry.
Resubmit	After receiving feedback or comments from the reviewer, the Initiator has the opportunity to revise the RFI and provide further information. The updated RFI is then resubmitted for another round of review.
Clarification	If the reviewer requests clarification, the Initiator must review the comments and decide how to proceed. They can either Resubmit the updated RFI with the required clarifications or Cancel the request if it's determined that no further action is needed.
Cancel	At this step, the Initiator or reviewer may choose to cancel the RFI if it's determined that the request is no longer necessary. A valid reason for cancellation is required to ensure proper documentation.
Confirm	Once the reviewer provides a response to the RFI, the Initiator is notified and must Confirm that the response has been received. This step acknowledges that the inquiry has been addressed.

**Acknowledge**

The Initiator confirms that they have received the final response, and that all necessary information has been provided, completing the record. This formal acknowledgment ensures that the RFI process is fully documented.

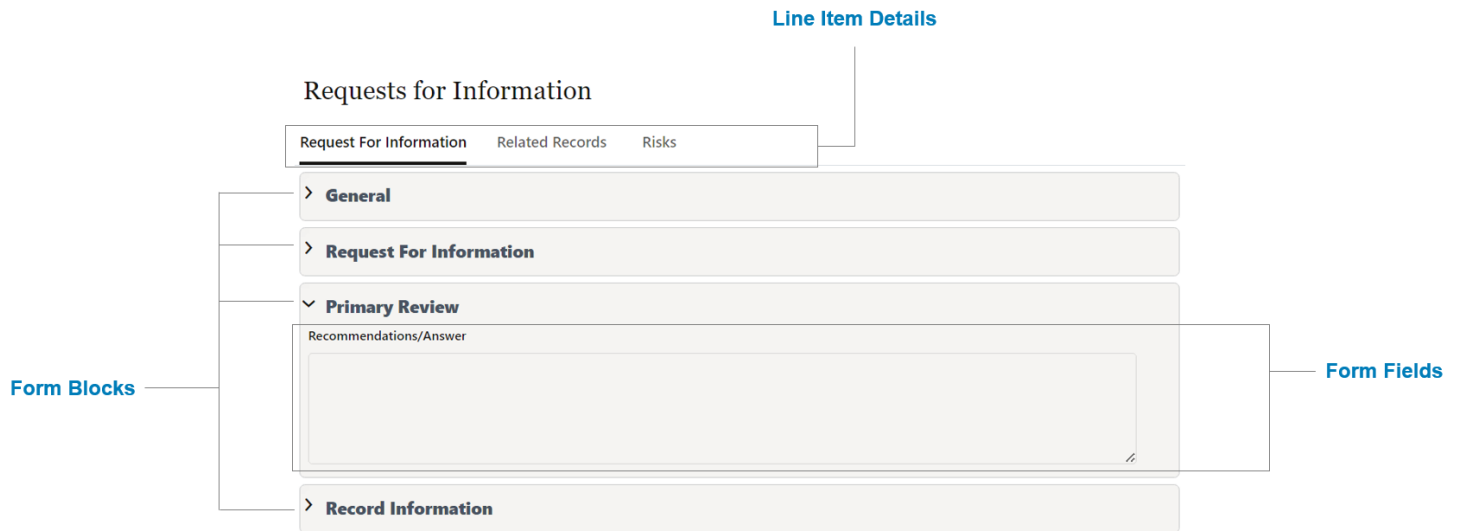
End

The RFI process reaches its conclusion in this step. The record is now marked as Complete, and no further action is required. This marks the final stage of the workflow.



1.4 RFI Form Explained

This form is divided into several blocks, containing mandatory and optional fields, as well as line items. Understanding these elements is crucial for accurately completing the form.



1.4.1 Form Blocks

The upper part of the form is divided into four blocks, each consisting of rows of input fields. These blocks are designed to organize the information efficiently.

- **General:** This block captures essential metadata for the business process, including basic information like the record ID, title, status, and key dates. It helps in identifying and tracking the form through its lifecycle.
- **Request for Information:** This block is designed to capture the key details about the information or clarification being requested. Its purpose is to ensure that users provide enough context about the issue or question, including which areas of the project are affected and the nature of the inquiry. The information entered here helps streamline communication between project team members, ensuring that the right individuals or teams are engaged to address the concern effectively and promptly.
- **Primary Review:** This block is where the initial assessment of the RFI occurs. The purpose of the primary review is to allow reviewers to add their insights, recommendations, or answers to the original inquiry. It ensures that any additional information or clarifications are documented before the RFI is either completed or sent back for further action. This block plays a crucial role in maintaining a clear and transparent record of the decision-making process.
- **Record Information:** This block provides additional organizational and project-specific information, linking the project to its broader organizational context. It includes details about the organization, business unit, and program, facilitating better alignment and tracking within the organization.

1.4.2 Form Fields

The fields in these blocks behave according to their data elements:

- **Editable Fields:** These can be filled in or modified by the user.
- **Read-Only Fields:** These are automatically filled and cannot be changed by the user.
- **Record Number:** Automatically generated by the system.
- **Title:** A required input that must be provided by the user.

While optional fields are present in the form, this guide focuses on the mandatory fields required for form creation. Optional fields may include additional details like secondary objectives, detailed cost breakdowns, and stakeholder information, which can be filled in based on organizational needs (Reference [BU Portal](#) relevant to your organization).



1.4.3 Line Item Details

A line item is a detailed entry within a business process (BP) form, such as transactions or documents, that can be individually edited or deleted if the form is still editable.

- **Related Records (Line Item):** The Related Records line item in the RFI form serves as a way to connect the current Request for Information with other key records in the project, such as Risks, Issues, Action Items, or Design Change Notices. This feature ensures that any relevant records tied to the RFI are properly referenced, creating a clear and organized linkage between related information across different business processes. By doing so, it enhances project traceability and provides a comprehensive view of how the RFI impacts other aspects of the project, helping users manage interdependencies and making it easier to review all connected documentation in one place.
- **Risks (Line Item):** The Risk line item in the RFI form is designed to allow users to directly reference any potential or identified risks associated with the RFI. The purpose of this field is to document risks that may arise due to the clarification or information request made in the RFI. By linking a specific risk record, users can ensure that the risk is properly tracked and managed within the project, facilitating proactive mitigation strategies. This also creates an audit trail, showing the relationship between the RFI and any related risks, making it easier to monitor and address risks in a timely and organized manner.



2.Step-by-Step Instructions

Important Note

If the Initiator is an All-Project User (not a Partner User), they can choose between two available workflows in the RFI business process: Internal or External. When the Initiator selects "Create," they can opt for the Internal Workflow. However, if the Initiator is a Partner User (such as a Contractor or Engineer), they will not have the option to choose a workflow, as it will automatically default to the Internal Workflow.

2.1 Internal Request for Information Workflows

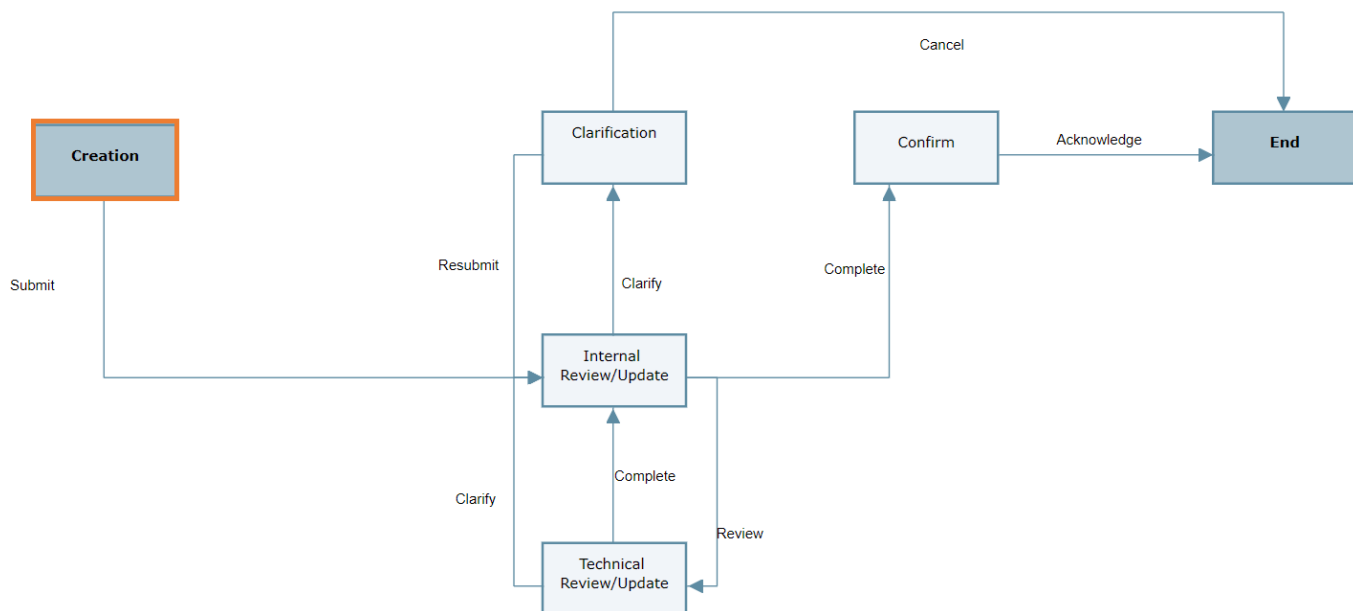
2.1.1 Create Internal Requests for Information (RFI)

User Roles

All Project User & Partner User

Workflow Step Summary

If the Initiator is an All Project User and not a Partner User, they can select 1 out of 2 workflows from the RFI BP. The Initiator chooses the Internal WF. Note: If the Initiator is a Partner User (Contractor or Engineer), when they click "Create" they will not have a WF option to select, it will default to the Internal WF



1. In the left Navigator, click **Design and Construction > Requests for Information**.
2. Click **+ Create & Select WF01-Internal**.



Requests for Information

Information > **Project Planning and Initiation** > **Cost Details** > **Design and Construction** > **Requests for Information**

WF01 - Internal **WF02 - External**

#	Title	Creator	Creation Date	Status
061	Test 01	Company Administrator	06/07/2024 04:06 AM	Submitted
RFI-000060	Test pdf	Company Administrator	06/07/2024 04:05 AM	Clarified
RFI-000059	Test 01	Company Administrator	06/07/2024 03:21 AM	Clarified
RFI-000058	Conversion testing 01	Company Administrator	06/06/2024 05:08 AM	Acknowledged
RFI-000057	Conversion testing 01	Company Administrator	06/06/2024 05:08 AM	Acknowledged
RFI-000056	Conversion testing 01	Company Administrator	06/05/2024 05:14 AM	Acknowledged
RFI-000055	Conversion testing 01	Company Administrator	06/05/2024 05:14 AM	Acknowledged
RFI-000054	Conversion testing 01	Company Administrator	06/03/2024 09:05 AM	Acknowledged
RFI-000053	Conversion testing 01	Company Administrator	06/03/2024 09:05 AM	Acknowledged
RFI-000052	Conversion testing 01	Company Administrator	05/31/2024 01:03 AM	Acknowledged
RFI-000051	Conversion testing 01	Company Administrator	05/31/2024 01:03 AM	Acknowledged
RFI-000050	Conversion testing 01	Company Administrator	05/31/2024 01:03 AM	Acknowledged

3. In the **General** block of the upper form, complete all mandatory and relevant optional fields.

Title	Provide a brief, descriptive title for the RFI that clearly summarizes the nature of the request. Keep in mind that the title is limited to 50 characters or fewer, so focus on capturing the key details succinctly to ensure clarity and ease of reference.
Due Date	Select the date by which a response to the RFI is required. Ensure the due date allows enough time for review and resolution, keeping the project timeline in mind. Accurate due dates help prioritize and manage the workflow efficiently.

Request For Information **Related Records**

General

Record No

Title *

Enter 50 or fewer characters.

Due Date

08/05/2024 11:57 PM

Creator

Soumitra Mandal - All Project User

Project Manager

Status

Priority

Normal

Originator

Soumitra Mandal - All Project User

Creation Date

Record Last Update Date

Attachments **Comments** **Linked Records**

U

4. In the **Request for Information** block of the upper form, complete all mandatory and relevant optional fields.

Discipline/Department Impacted	This dropdown field allows users to specify the project area or department affected by the issue or query. Clearly identifying the impacted discipline or department helps project stakeholders efficiently prioritize and respond to the RFI. This ensures that the appropriate team can address the concern, minimizing delays in the project workflow.
Reason Code	This field enables users to categorize the reason for submitting the RFI, providing a structured way to identify the nature of the inquiry. By selecting an appropriate reason code, users help streamline the tracking and analysis



Questions or Clarifications

of RFIs, making it easier to identify trends, prioritize issues, and improve response processes over time.

This field allows users to clearly express the specific questions or issues for which clarification is needed. Use this space to concisely describe the information gap, point of ambiguity, or specific concern related to the project. Providing clear and precise questions ensures a more accurate and timely response from the reviewer.

Request For Information

RFI Type
Internal

Discipline/Department Impacted *
Select

Contractor/Vendor RFI #
Contractor/Vendor
Southern Company

If Other Discipline/Department
Oracle PO #
Type a Oracle PO #...

Sub Project ID
Reason Code *
Select

Other
Questions or Clarifications *
Proposed Solution

Attachments Comments Linked Records

Information No Attachments

5. Navigate to the **Related Records** tab and click **ADD** to include a new line item. In Line Item Details, complete all mandatory and relevant optional fields.

Record Type

This field defines the type of record that needs to be reviewed. The following types are associated with the Requests for Information (RFI) business process:


- Risk
- Issue
- Action Item
- Design Change Notice

BP Reference

This field specifies the related business process reference for the record. The options are:

- Risk Reference
- Issue Reference
- Action Item Reference
- Design Change Notice Reference

Note: When a Record type is selected, only its related Reference field will be editable.

6. The **BP reference** Can be Selected through **Select** function .
7. Once all mandatory and relevant optional fields have been completed, click **SAVE**.
- a. **Save:** By selecting this option, the entered data will be preserved and not lost.



- b. **Save & Add New:** By selecting this option, the entered data will be preserved, and a new entry form will be opened for additional data input.

8. Once all mandatory and optional fields for the New **Requests for Information** are complete, click **Send** at the top right of the form.
- The **Workflow Actions Details** pop-up window will display.
 - User can also click **Save Draft** to revisit later.

Create New Requests for Information

Save Draft More Actions **Send**

Request For Information Related Records

9. Verify **Submit** as the Workflow Action.

10. In the **To** field click the text box ('Start typing for suggestions...') and type the name of the person(s) or group(s) to select the role to reassign the record to.

- The assignees can be searched using the **Select** function .

11. Click **Send**.



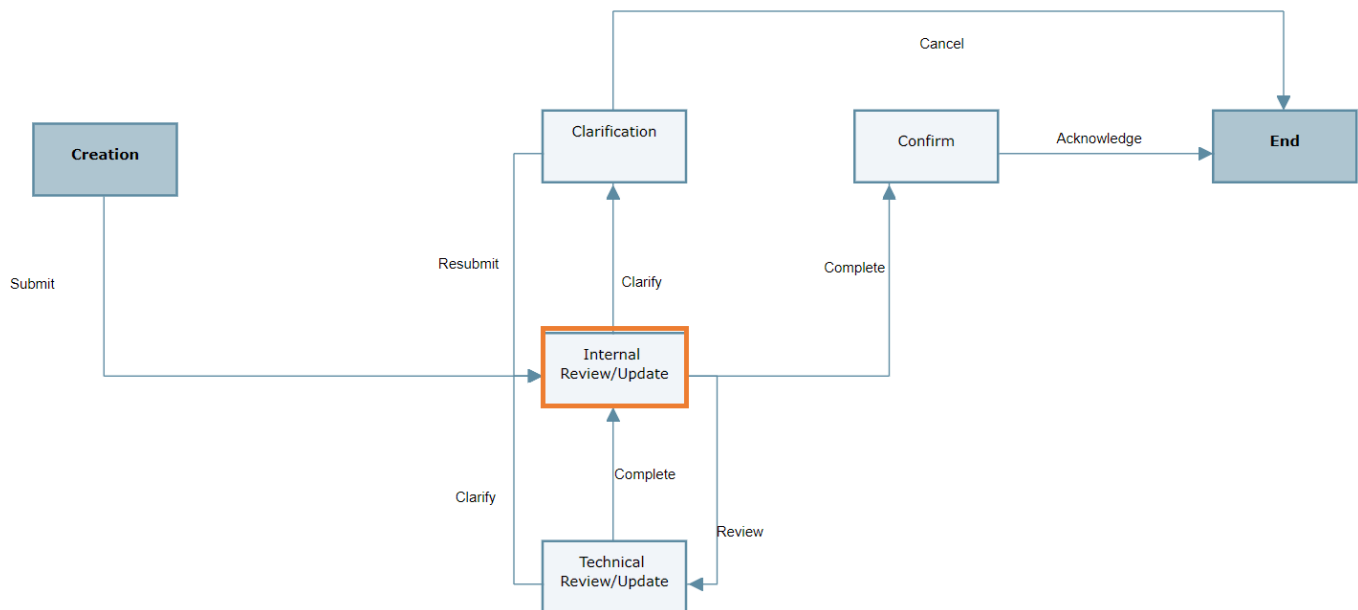
2.1.2 Perform Review of Internal RFI

User Roles

All Project User & Partner User

Workflow Step Summary

The assigned reviewer evaluates the RFI and decides the next course of action. They can choose to Complete the request by addressing it, ask for Clarification if more information is needed, send it for Review by another party, or Cancel the request if it is no longer relevant.



1. Click the Tasks option in the **Navigator**.
 - a. **Task Log** will show available records.
2. Double-click the Requests for Information BP with Sent for 'Internal Review/Update.'



Tasks

Notifications

Drafts

Shell Access Request

Document Manager

Tasks

+

Create

Actions

▼

View: All Tasks

▼

<div><div>✓</div><div>👤</div></div>	Origin	Business Process	Record Number	Title	Record Due	From	Sent for
<div><div>✓</div></div>	Unifier Showcase Spri...	Requests for Information	RFI-000062	RFI Ug TEST	08/06/2024 12:21 ...	Soumitra Mandal - ...	Internal Review/Update
<div><div>✓</div></div>	Unifier Showcase Spri...	Issues	ISS-000025	Test	08/05/2024 04:03 ...	Soumitra Mandal - ...	Monitor
<div><div>✓</div></div>	Unifier Showcase Spri...	Risks	RISK-011735	Risks UG 1	07/28/2024 10:50 ...	Soumitra Mandal - ...	Additional Review
<div><div>✓</div></div>	Unifier Showcase Spri...	Risks	RISK-011737	risk	07/29/2024 11:53 ...	Soumitra Mandal - ...	Review/Mitigate

3. Click **Accept**.

- The page will refresh and show options to Send or Save.

Requests for Information

Request For Information Related Records Technical Review Risks

Decline More Actions **Accept**

4. Navigate to **Primary Review** block of the upper form and complete all mandatory and relevant optional fields.

Additional Information	Use this field to provide any relevant supplementary details that support the RFI. This may include context, background information, or clarifications that assist the reviewer in understanding the request.
Recommendations/Answer	In this field, the reviewer should provide their response or recommendation based on the information provided in the RFI. This could include suggested actions, solutions, or direct answers to the request, depending on the nature of the inquiry.

Primary Review

Additional Information *

Enter 4000 or fewer characters.

Recommendations/Answer

5. Navigate to the **Technical Review** tab and click **ADD** to include a new line item. In Line Item Details, complete all mandatory and relevant optional fields.

Reviewers Name	Select the name of the individual performing the technical review from the user list. This ensures that the correct person is identified as the reviewer for tracking and accountability purposes.
-----------------------	--



Title	Enter the title or subject of the review. This should briefly summarize the focus of the technical review, highlighting the key aspects or topics being evaluated.
Recommendations/Answer	In this field, the reviewer should provide their response or recommendation based on the information provided in the RFI. This could include suggested actions, solutions, or direct answers to the request, depending on the nature of the inquiry.

Requests for Information Save Draft More Actions ▾ Send

Request For Information Related Records **Technical Review** Risks

⋮ ⌂ Add Actions ▾ ↺ 🖨 ▾ 🔍 ☰

No. ▾	📎...	Reviewers Name	Title	Sheet #	Rev #	De Re
-------	------	----------------	-------	---------	-------	-------

Technical Review Risks

Title	Sheet #	Rev #	Design Documents Revised
-------	---------	-------	--------------------------

Line Item Details Attachments Linked Records

General

Reviewers Name *

Type a User Name... 🔍 Required

Title *

Required

Sheet #

Rev #

Design Documents Revised

Select ▾

Recommendations/Answer *

Required

Cancel Save Save & Add New

6. Navigate to the **Risk** tab and click **Create** to add a new risk. Reference the Risks User Guide for form guidance.
7. As part of the Internal Review/update, the Reviewer may also complete the following actions:
 - a. **Attach Documents:** Attach files to be routed with the form. These attachments may be supporting documents and can also be included in the Comments section.
 - b. **Post Comments:** Add text comments that are like notes that accompany the Requests for Information record but do not become part of it. This field can be used to **provide clarification or document Recommendations made to the form.**
 - c. **Add Linked Records:** Create a link from one business process to another. This option is available only in BPs that have been designed to accommodate linked records. A user's ability to view a linked BP record is based on the user's permissions. If users cannot see the record in the log, they cannot see it in the link.



Request For Information Related Records Technical Review Risks

General

Record No: RFI-000062 Status: Submitted

Title: RFI Ug TEST Priority: Normal

Due Date: Originator:

Attachments Comments Linked Records

8. Once all mandatory and optional fields for the **Requests For Information** are complete, click **Send** at the top right of the form.
- The **Workflow Actions Details** pop-up window will display.
 - User can also click **Save Draft** to revisit later.

Requests for Information


Save Draft More Actions **Send**

Request For Information Related Records Technical Review Risks

General

Record No Status

Attachments Comments Linked Records Workflow Progress > []

9. Select the Workflow Action.
- Clarify:** Select this workflow action if the record needs to be routed back to the Initiator for Clarification.
 - Review:** Select this workflow action if the record needs to be routed to the Reviewer for a Technical Review/Update.
 - Cancel:** Select this workflow to cancel the Requests For Information record and send for End.
 - Complete:** Select this Workflow to Complete the Requests For Information Record and send for Complete.
10. Select **Clarify** as Workflow Action.
11. In the **To** field click the text box ('Start typing for suggestions...') and type the name of the person(s) or group(s) to select the role to reassign the record to.
- If the action **Review** is selected,
 - The assignees can be searched using the Select function .
 - If the actions **Complete** or **Clarify** are selected, the recipient in the **To** field becomes the Initiator by default.
 - If the action **Cancel** is selected,
 - Respective Reviewers will receive the notification.



Requests for Information

Request For Information Related Records

test

Proposed Solution

test

Primary Review

Additional Information *

test

Workflow Action Details

Workflow Actions *

Clarify

Select

Review

Complete

Cancel

Clarify

Send For Clarification

Task Due Date is not available

Cancel Send

12. Click **Send**.

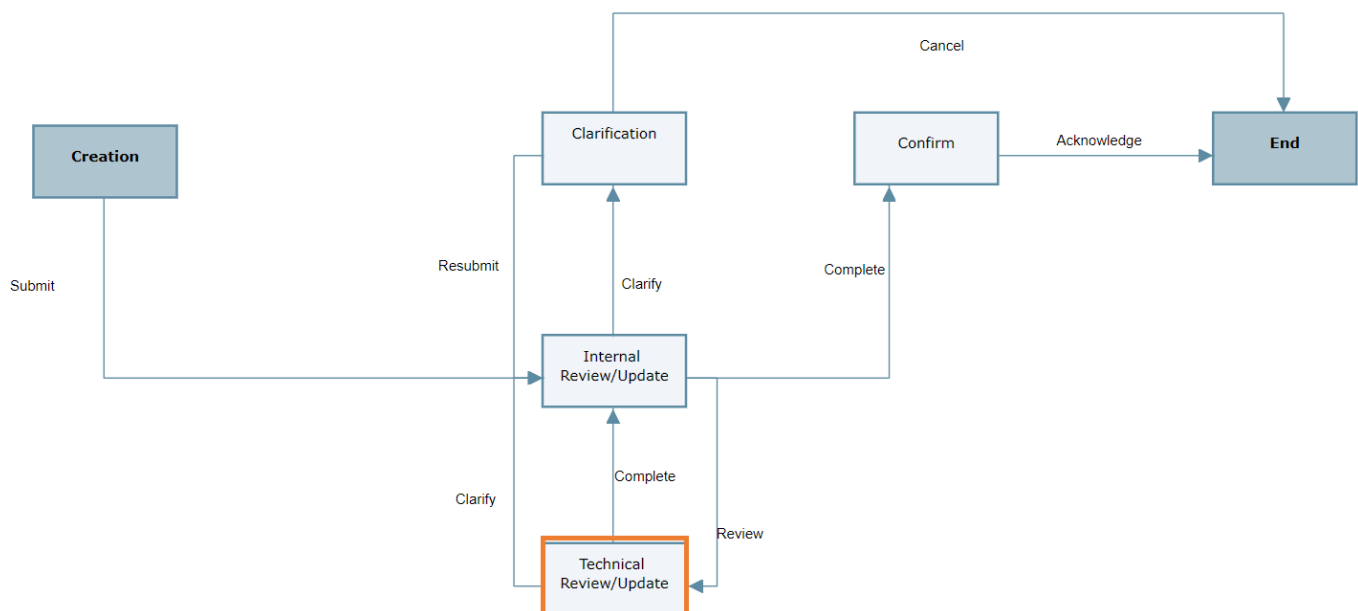
2.1.3 Perform Technical Review of Internal RFI

User Roles

All Project User & Partner User

Workflow Step Summary

The RFI undergoes further technical review, during which the reviewer evaluates all gathered input and decides on how to proceed. They can either request Clarification again if the information is still insufficient or Complete the RFI if all required information is available.



1. Click the Tasks option in the **Navigator**.



- a. **Task Log** will show available records.
2. Double-click the Requests for Information BP with Sent for “Technical Review/Update.”

Tasks

Notifications

Drafts

Shell Access Request

Document Manager

Tasks

+ Create

Actions

View: All Tasks

<div><div></div></div> @ Origin	Business Process	Record Number	Title	Record Due	From	Sent for	Task Due	Received	Workflow Name
<div><div></div></div> Unifier Showcase Spr...	Requests for Information	RFI-000065	test	08/08/2024 11:19 ...	Soumitra Mandal - ...	Technical Review/Update	06/27/2024 11:40 ...	WF01 - Internal	
<div><div></div></div> Unifier Showcase Spr...	Requests for Information	RFI-000066	test	08/08/2024 11:27 ...	Soumitra Mandal - ...	Clarification	06/27/2024 11:33 ...	WF01 - Internal	
<div><div></div></div> Unifier Showcase Spr...	Requests for Information	RFI-000064	Test 02	08/07/2024 11:21 ...	Hariharanath Mag...	Confirm	06/27/2024 01:26 ...	WF02 - External	
<div><div></div></div> Unifier Showcase Spr...	Requests for Information	RFI-000063	test	08/06/2024 04:45 ...	Soumitra Mandal - ...	Clarification	06/25/2024 04:47 ...	WF01 - Internal	

3. Click **Accept**.
- a. The page will refresh and show options to Send or Save.

Requests for Information

Decline More Actions **Accept**

Request For Information Related Records **Technical Review** Risks

Task Details
From
Soumitra Mandal - All Project User

Attachments Comments Linked Records Workflow Progress Au > [Icons]

4. Navigate to **Technical Review** Tab, Click **Add**.

Requests for Information

Save Draft More Actions **Send**

Request For Information Related Records **Technical Review** Risks

Add Actions [Icons]

No. [Icon] [Icon] Reviewers Name Title Sheet # Rev # De Re

5. In the **General** Block, Complete the following Fields.

Reviewers Name	Select the name of the individual performing the technical review from the user list. This ensures that the correct person is identified as the reviewer for tracking and accountability purposes.
Title	Enter the title or subject of the review. This should briefly summarize the focus of the technical review, highlighting the key aspects or topics being evaluated.
Recommendations/ Answer	In this field, the reviewer should provide their response or recommendation based on the information provided in the RFI. This could include suggested actions, solutions, or direct answers to the request, depending on the nature of the inquiry.



The screenshot shows the 'Technical Review' tab of the 'Requests for Information' form. The 'Line Item Details' sub-tab is selected, displaying a form with the following fields: 'Reviewers Name' (with a dropdown menu), 'Title' (required), 'Sheet #' (required), 'Rev #', 'Design Documents Revised' (with a dropdown menu), and 'Recommendations/Answer' (required). The 'Save' and 'Save & Add New' buttons are highlighted with orange boxes.

4. Once Complete the mandatory & optional fields of the **Line Item Details** Tab. Click,
 - a. **Save**
 - b. **Save & Add New**
5. As part of the Technical Review step, the Reviewer may also complete the following actions:
 - a. **Add Attachment:** Attach files to be routed with the form. These attachments may be supporting documents and can also be included in the Comments section.
 - b. **Add Linked Records:** Create a link from one business process to another. This option is available only in BPs that have been designed to accommodate linked records. A user's ability to view a linked BP record is based on the user's permissions. If users cannot see the record in the log, they cannot see it in the link.

The screenshot shows the 'Requests for Information' form with the 'Technical Review' tab selected. The 'Attachments' and 'Linked Records' sub-tabs are highlighted with orange boxes. The 'Send' button is also highlighted with an orange box.

6. Once all mandatory and optional fields for the **New Requests For Information** are complete, click **Send** at the top right of the form.
 - a. The **Workflow Actions Details** pop-up window will display.
 - b. User can also click **Save Draft** to revisit later.

The screenshot shows the 'Requests for Information' form with the 'General' tab selected. The 'Send' button is highlighted with an orange box.

7. Select the Workflow Action.
 - a. **Clarify:** Select this workflow action if the record needs to be routed back to the Initiator for Clarification.
 - b. **Complete:** Select this Workflow to Complete the Requests for Information Record and send for Internal Review/Update.



8. Verify **Complete** as the Workflow Action.
9. In the **To** field click the text box ("Start typing for suggestions...") and type the name of the person(s) or group(s) to select the role to reassign the record to.

a. The assignees can be searched using the Select function .

Requests for Information

Request For Information Related Records Technical Review

Add Actions

No. Reviewers Name Title

Total: 0

Workflow Action Details

▼ Action Details

Workflow Actions * Complete

Send For Internal Review/Update

Select

Complete

Clarify

Adam Doe;Company Administrator;Jane Doe;Jose Cartaya;Leah Usry;Maya...

> Due Date Details

Cancel Send

Information

No line items are available.

10. Click **Send**.



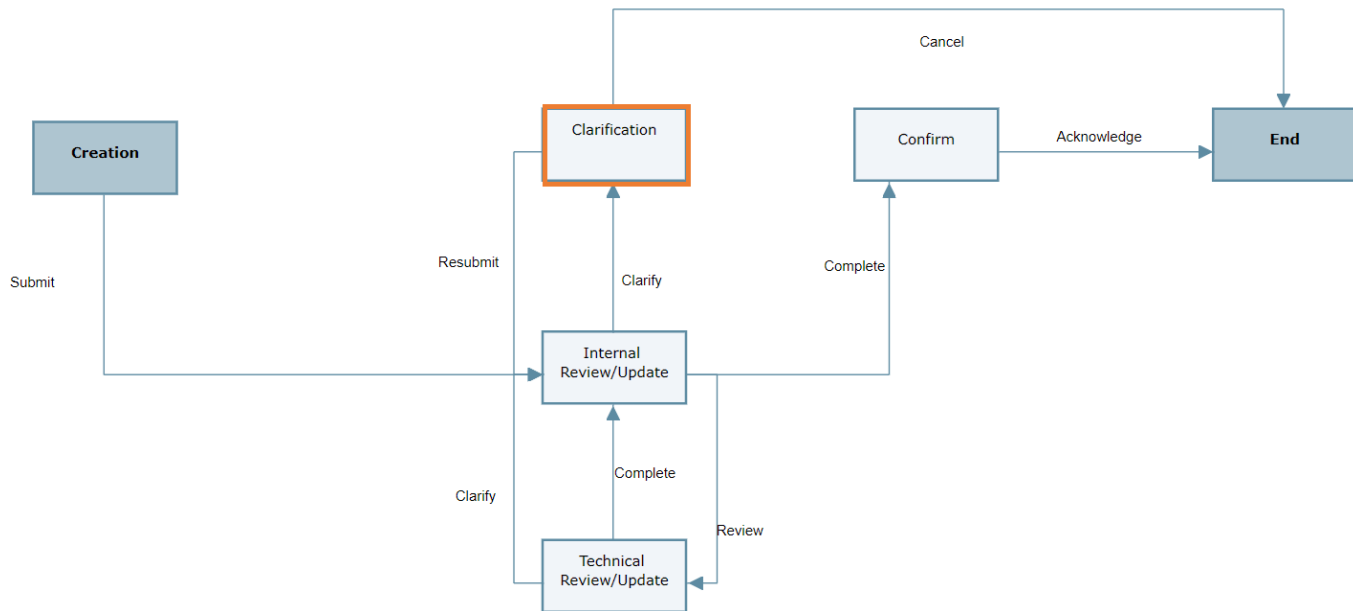
2.1.4 Clarify Internal RFI

User Roles

All Project User & Partner User

Workflow Step Summary

If the reviewer needs additional information or finds the request unclear, they will send it back to the Initiator, asking for further clarification. The Initiator then updates the RFI with the requested details before resubmitting it for review.



1. Click the Tasks option in the **Navigator**.
 - a. **Task Log** will show available records.
2. Double-click the Requests for Information BP with Sent for 'Clarification.'
 - a. This will open the Requests for Information pop-up window.

Tasks										
+ Create Actions View: All Tasks [Edit] [Refresh] [Print] [Search] [Filter]										
	Origin	Business Process	Record Number	Title	Record Due	From	Sent for	Task Due	Received	Workflow Name
✓	Unifier Showcase Spr...	Requests for Information	RFI-000071	test	10/01/2024 02:09 ...	Soumitra Mandal ...	Clarification		08/20/2024 02:11 ...	WF01 - Internal
✓	Unifier Showcase Spr...	Nonconformance Report	NCR-000069	test	12/22/2024 10:47 ...	Pilli Anusha - Const...	Revision		08/18/2024 10:53 ...	WF01 - Non safety...
✓	Unifier Showcase Spr...	Action Items	AI-000112	Test		Tiasha Das- Projec...	Action		07/30/2024 09:30 ...	WF01 - Action It...
✓	Unifier Showcase Spr...	Risks	RISK-011740	Test	09/10/2024 02:13 ...	Soumitra Mandal ...	Review/Mitigate		07/30/2024 02:16 ...	WF01 - Risks V01
✓	Unifier Showcase Spr...	Requests for Information	RFI-000069	Test	09/08/2024 11:58 ...	Soumitra Mandal ...	Internal Review/Update		07/29/2024 12:04 ...	WF01 - Internal

3. Click **Accept**.
 - a. The page will refresh and show options to Send or Save.

Requests for Information

Decline More Actions **Accept**

Request For Information Related Records Technical Review Risks

4. Navigate to **Requests for Information** Tab, Complete the Mandatory field.
 - a. **Questions or Clarifications:** The “Questions or Clarifications” field allows user to articulate the specific queries or issues that User need clarification on. Use this field to concisely describe the information gap, ambiguity, or point of concern related to the project.



Other

Questions or Clarifications *

Enter 4000 or fewer characters.

Proposed Solution

C

5. Once all mandatory and optional fields for the Clarifications Step are complete, click **Send** at the top right of the form.
 - a. The **Workflow Actions Details** pop-up window will display.
 - b. User can also click **Save Draft** to revisit later.

Requests for Information

Save Draft More Actions Send

Request For Information Related Records Technical Review Risks

General

Record No Status

Attachments Comments Linked Records Workflow Progre > []

6. Verify **Resubmit** as the Workflow Action.
7. In the **To** field click the text box ('Start typing for suggestions...') and type the name of the person(s) or group(s) to select the role to reassign the record to.
 - b. The assignees can be searched using the Select function.



Requests for Information

Request For Information Related Records

General

Record No
RFI-000062

Title *
RFI Ug TEST

Due Date
08/06/2024 12:21 AM

Creator
Soumitra Mandal - All Project User

Project Manager
Company Administrator

Request For Information

RFI Type
Internal

Discipline/Department Impacted *
Civil x

Workflow Action Details

Action Details

Workflow Actions *
Resubmit

Send For
Internal Review/Update

To
Start typing for suggestions...

CC
Adam Doe;Company Administrator;Jane Doe;Jose Cartaya;Leah Usry;Maya...

Due Date Details

Task Due Date

Information
No Attachments.

Cancel **Send**

8. Click **Send**.

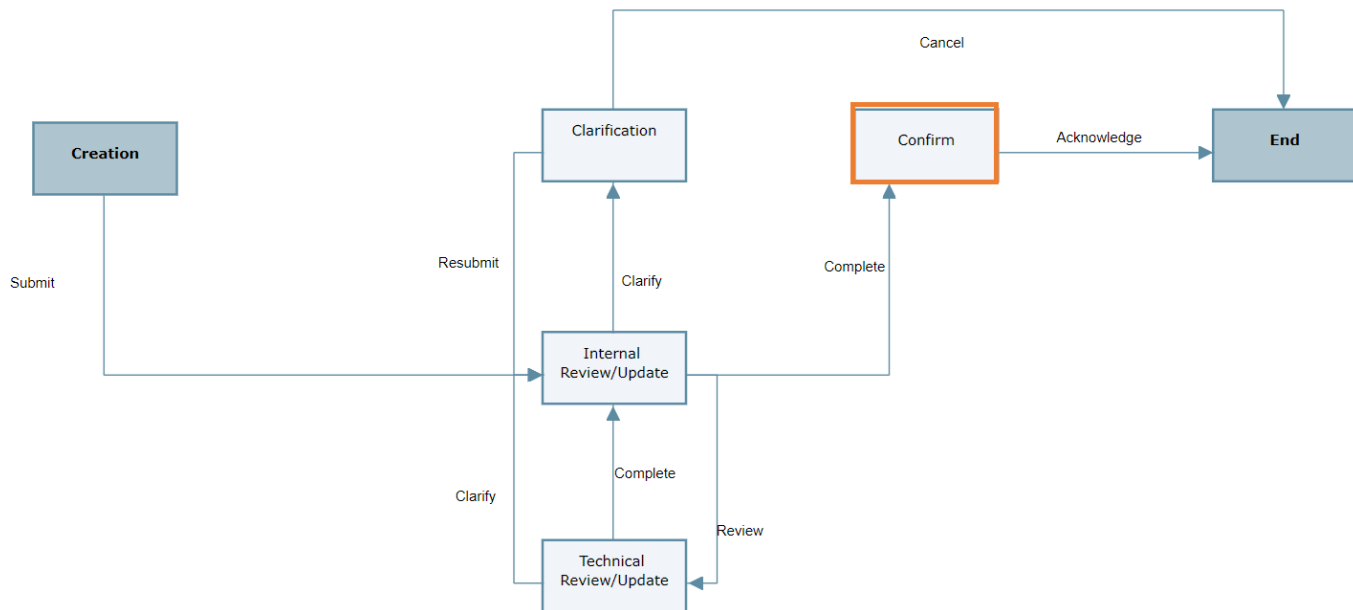
2.1.5 Confirm Internal RFI

User Roles

All Project User & Partner User

Workflow Step Summary

Once the RFI is resolved, the Initiator is notified of the outcome and must Confirm that they have received the response. This step acknowledges that the inquiry has been successfully addressed.



1. Click the Tasks option in the **Navigator**.
 - a. **Task Log** will show available records.
2. Double-click the Requests for Information BP with Sent for 'Confirm.'

Tasks								
+ Create Actions View: All Tasks [Icons]								
	Origin	Business Process	Record Number	Title	Record Due	From	Sent for	Task Due
✓	Unifier Showcase Spri...	Requests for Information	RFI-000062	RFI Ug TEST	08/06/2024 12:21 ...	Soumitra Mandal ~...	Confirm	
✓	Unifier Showcase Spri...	Requests for Information	RFI-000063	test	08/06/2024 04:45 ...	Soumitra Mandal ~...	Clarification	
✓	Unifier Showcase Spri...	Issues	ISS-000025	Test	08/05/2024 04:03 ...	Soumitra Mandal ~...	Monitor	
✓	Unifier Showcase Spri...	Risks	RISK-011735	Risks UG 1	07/28/2024 10:50 ...	Soumitra Mandal ~...	Additional Review	

3. Click **Accept**. The page will refresh and show options to Send or Save.

Requests for Information		Decline	More Actions	Accept
Request For Information Related Records Risks				
Task Details		Attachments Comments Linked Records Workflow Progress Au > [Icons]		
From Soumitra Mandal - All Project User				

4. As part of the Confirm Step, the Reviewer may also complete the following actions:
 - a. **Post Comments:** Add text comments that are like notes that accompany the Requests for Information record but do not become part of it. This field can be used to **provide clarification or document Recommendations made to the form.**
 - b. **Add Linked Records:** Create a link from one business process to another. This option is available only in BPs that have been designed to accommodate linked records. A user's ability to view a linked BP record is based on the user's permissions. If users cannot see the record in the log, they cannot see it in the link.



Requests for Information

Save Draft More Actions Send

Request For Information Related Records Risks

5. Once all mandatory and optional fields for the **New Requests For Information** are confirmed, click **Send** at the top right of the form.
 - a. The **Workflow Actions Details** pop-up window will display.
 - b. User can also click **Save Draft** to revisit later.

Requests for Information

Save Draft More Actions Send

Request For Information Related Records Risks

6. Verify **Acknowledge** as the Workflow Action.
7. In the **CC** field, the name of the person(s) or group(s) Automatically fetched to receive a notification.

8. Click **Send**.

2.2 External Request for Information Workflows



2.2.1 Create External Requests for Information (RFI)

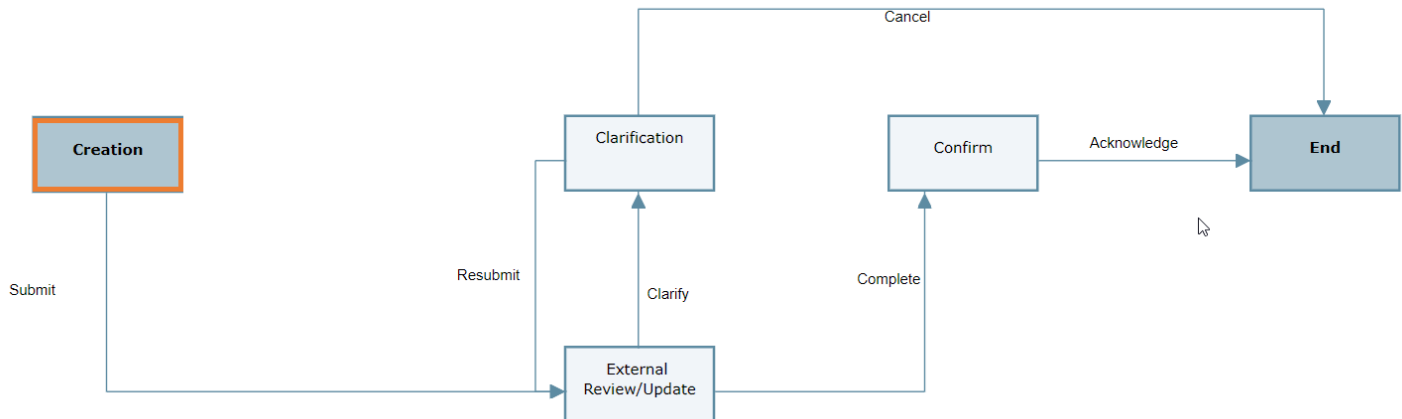
The Initiator is an All Project User and they can select 1 out of 2 workflows from the RFI BP. The Initiator chooses the External WF.

User Roles

All Project User

Workflow Step Summary

At this step, the Initiator, who is an All Project User, begins the process by selecting one of two available workflows (Internal or External) from the RFI business process (BP). Once the External Workflow is chosen, the RFI is prepared for submission by entering key details about the request.



1. In the left Navigator, click **Design and Construction > Requests for Information**.
2. Click **+ Create & Select WF02-External**.

⊕ Design and Construction

Correspondence

Daily Logs

Internal Document Reviews

Materials Receiving Form

Nonconformance Report

Requests for Information

Requests for Information

+ Create

Actions

View : All Records

#	Title	Creator	Creation Date	Status
WF01 - Internal				
WF02 - External				
015	Conversion testing 01	Company Administrator	06/05/2024 05:14 AM	Acknowledged
RFI-000014	Conversion testing 01	Company Administrator	06/05/2024 05:14 AM	Acknowledged
RFI-000013	Conversion testing 01	Company Administrator	06/03/2024 09:05 AM	Acknowledged
RFI-000012	Conversion testing 01	Company Administrator	06/03/2024 09:05 AM	Acknowledged
RFI-000011	Conversion testing 01	Company Administrator	05/30/2024 06:40 AM	Acknowledged
RFI-000010	Conversion testing 01	Company Administrator	05/30/2024 06:40 AM	Acknowledged

3. In the **General** block of the upper form, complete all mandatory and relevant optional fields.

Title	Provide a brief, descriptive title for the RFI that clearly summarizes the nature of the request. Keep in mind that the title is limited to 50 characters or fewer, so focus on capturing the key details succinctly to ensure clarity and ease of reference.
Due Date	Select the date by which a response to the RFI is required. Ensure the due date allows enough time for review and resolution, keeping the project timeline in mind. Accurate due dates help prioritize and manage the workflow efficiently.



Request For Information Related Records

General

Record No

Title *

Due Date

08/05/2024 11:57 PM

Creator

Soumitra Mandal - All Project User

Project Manager

Status

Priority

Normal

Originator

Soumitra Mandal - All Project User

Creation Date

Record Last Update Date

Attachments

Comments

Linked Records

4. In the **Request for Information** block of the upper form, complete all mandatory and relevant optional fields.

Discipline/Department Impacted

This dropdown field allows users to specify the project area or department affected by the issue or query. Clearly identifying the impacted discipline or department helps project stakeholders efficiently prioritize and respond to the RFI. This ensures that the appropriate team can address the concern, minimizing delays in the project workflow.

Reason Code

This field enables users to categorize the reason for submitting the RFI, providing a structured way to identify the nature of the inquiry. By selecting an appropriate reason code, users help streamline the tracking and analysis of RFIs, making it easier to identify trends, prioritize issues, and improve response processes over time.

Questions or Clarifications

This field allows users to clearly express the specific questions or issues for which clarification is needed. Use this space to concisely describe the information gap, point of ambiguity, or specific concern related to the project. Providing clear and precise questions ensures a more accurate and timely response from the reviewer.

Request For Information

RFI Type

Internal

Discipline/Department Impacted *

Select

Required

Contractor/Vendor RFI #

Sub Project ID

Other

Questions or Clarifications *

Required

Proposed Solution

Contractor/Vendor

Southern Company

If Other Discipline/Department

Oracle PO #

Type a Oracle PO #...

Reason Code *

Select


Required

5. Navigate to the **Related Records** tab and click **ADD** to include a new line item. In Line Item Details, complete all mandatory and relevant optional fields.

Record Type	<p>This field defines the type of record that needs to be reviewed. The following types are associated with the Requests for Information (RFI) business process:</p> <ul style="list-style-type: none"> ▪ Risk ▪ Issue ▪ Action Item ▪ Design Change Notice
BP Reference	<p>This field specifies the related business process reference for the record. The options are:</p> <ul style="list-style-type: none"> ▪ Risk Reference ▪ Issue Reference ▪ Action Item Reference ▪ Design Change Notice Reference

Note: When a Record type is selected, only its related Reference field will be editable.

Note: If User Selects Any Record Type, its Respective Reference field will be enabled and all other reference field will be disabled.

6. The **BP reference** Can be Selected through **Select** function  .
7. Once Complete the mandatory & optional fields of the **Related Records** Tab Details. Click,
 - a. **Save**
 - b. **Save & Add New**



Line Item Details Attachments Linked Records

General

Record Type *

Select

Risk
Issue
Action Item
Design Change Notice

Risk Reference

Type a Record No...

Issues Reference

Type a Record No...

Action Item Reference

Type a Record Number...

Design Change Notice Reference

Type a Record #...

Comments


Cancel Save Save & Add New

8. Once all mandatory and optional fields for the New **Requests For Information** are complete, click **Send** at the top right of the form.
- a. The **Workflow Actions Details** pop-up window will display.
 - b. User can also click **Save Draft** to revisit later.

Create New Requests for Information

Save Draft More Actions **Send**

Request For Information Related Records

9. Verify **Submit** as the Workflow Action.
10. In the **To** field click the text box ('Start typing for suggestions...') and type the name of the person(s) or group(s) to select the role to reassign the record to.
- a. The assignees can be searched using the **Select** function  .



Create New Requests for Information

Request For Information Related Records

General

Record No

Title *

RFI UG EX

Due Date

08/07/2024 10:38 PM

Creator

Soumitra Mandal - All Project User

Project Manager

Request For Information

RFI Type

External

Discipline/Department Impacted *

Mechanical X

Workflow Action Details

Action Details

Workflow Actions *

Submit

Send For

External Review/Update

To

Start typing for suggestions...

CC

Company Administrator;Rashmi Singh-Project Manager;Project Managers

Due Date Details

Task Due Date



Task Due Date is not available

Cancel

Send

Save Draft

More Actions

Send

Comments

Linked Records

Information
No Attachments.**11.** Click **Send**.



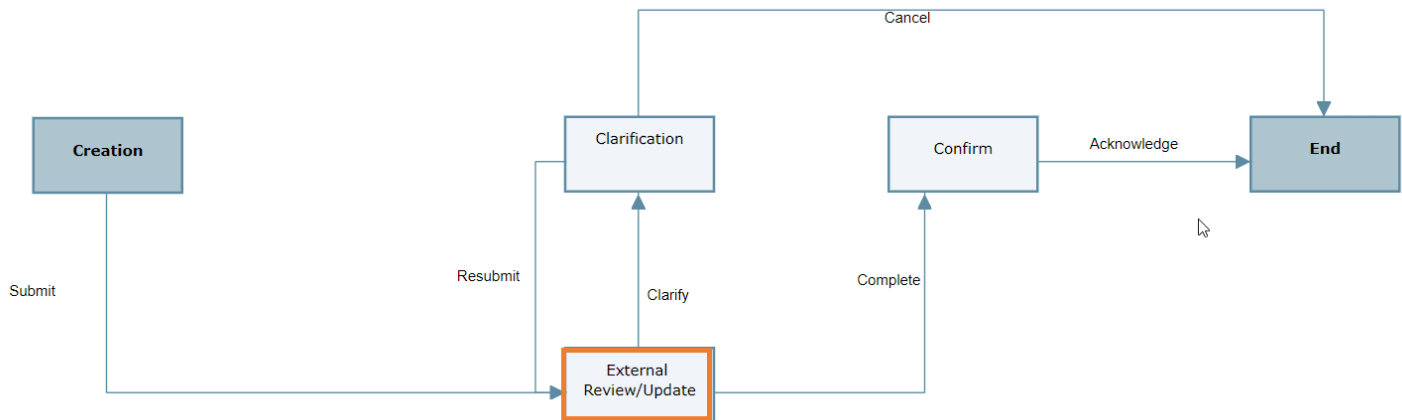
2.2.2 Perform Review of External RFI

User Roles

All Project User & Partner User

Workflow Step Summary

In this step, the designated reviewer examines the submitted RFI to determine the best course of action. The reviewer can either Complete the request by providing all necessary information or request Clarification if additional details are needed to address the inquiry.



1. Click the Tasks option in the **Navigator**.
 - a. **Task Log** will show available records.
2. Double-click the Requests for Information BP with Sent for 'External Review/Update.'
 - a. This will open the Requests for Information pop-up window.

Tasks

Notifications

Drafts

Shell Access Request

Document Manager

Tasks

+ Create

Actions

View: Received in last 7 days

@ Origin	Business Process	Record Number	Title	Record Due	From	Sent for	Task Due	Received	Workflow Name
Unifier Showcase Spri...	Requests for Infor...	RFI-000064	Test 02	08/07/2024 11:21 ...	Soumitra Mandal ...	External Review/U...		06/26/2024 11:24 ...	WF02 - External
Unifier Showcase Spri...	Submittals	VT-000115	Test	07/10/2024 07:29 ...	Hariharanath Mag...	Re Submission		06/26/2024 07:29 ...	WF01 - Submittals...
Unifier Showcase Spri...	Submittals	VT-000112	Test	07/10/2024 06:55 ...	Hariharanath Mag...	Re Submission		06/26/2024 06:55 ...	WF01 - Submittals...

3. Click **Accept**.
 - a. The page will refresh and show options to Send or Save.

Requests for Information

Decline More Actions **Accept**

Request For Information Related Records Technical Review Risks

4. Navigate to **Primary Review** block of the upper form and complete all mandatory and relevant optional fields.

Additional Information

Use this field to provide any relevant supplementary details that support the RFI. This may include context, background information, or clarifications that assist the reviewer in understanding the request.

Recommendations/Answer

In this field, the reviewer should provide their response or recommendation based on the information provided in the RFI. This could include suggested actions, solutions, or direct answers to the request, depending on the nature of the inquiry.



✓ **Primary Review**

Additional Information *

Enter 4000 or fewer characters.

Recommendations/Answer

5. As part of the Internal Review/update, the Reviewer may also complete the following actions:
- Attach Documents:** Attach files to be routed with the form. These attachments may be supporting documents and can also be included in the Comments section.
 - Post Comments:** Add text comments that are like notes that accompany the Requests For Information record but do not become part of it. This field can be used to **provide clarification or document Recommendations made to the form.**
 - Add Linked Records:** Create a link from one business process to another. This option is available only in BPs that have been designed to accommodate linked records. A user's ability to view a linked BP record is based on the user's permissions. If users cannot see the record in the log, they cannot see it in the link.

Request For Information Related Records Technical Review Risks

✓ **General**

Record No: RFI-000062 Status: Submitted

Title: RFI Ug TEST Priority: Normal

Due Date: Originator:

Attachments Comments Linked Records

6. Once all mandatory and optional fields for the New **Requests For Information** are complete, click **Send** at the top right of the form.
- The **Workflow Actions Details** pop-up window will display.
 - user can also click **Save Draft** to revisit later.

Requests for Information

Save Draft More Actions **Send**

Request For Information Related Records Risks

Contractor/Vendor RFI # Oracle PO #

Attachments Comments Linked Records Workflow Progress Au > []

7. Select the Workflow Action.
- Clarify:** Select this workflow action if the record needs to be routed back to the Initiator for Clarification.
 - Complete:** Select this Workflow to Complete the Requests For Information Record and send for Complete.



8. Verify **Clarify** as the Workflow Action.

- If the actions **Complete** or **Clarify** are selected, the recipient in the **To** field becomes the Initiator by default.

Requests for Information

Request For Information Related Records Risks

General

Record No
RFI-000064

Title
Test 02

Due Date
08/07/2024 11:21 PM

Creator
Soumitra Mandal - All Project User

Project Manager
Company Administrator

Request For Information

RFI Type
External

Discipline/Department Impacted
Engineering & Services (TES)

Workflow Action Details

Action Details

Workflow Actions *
Clarify

Send For
Clarification

Task Due Date
Task Due Date is not available

Cancel Send

9. Click **Send**.

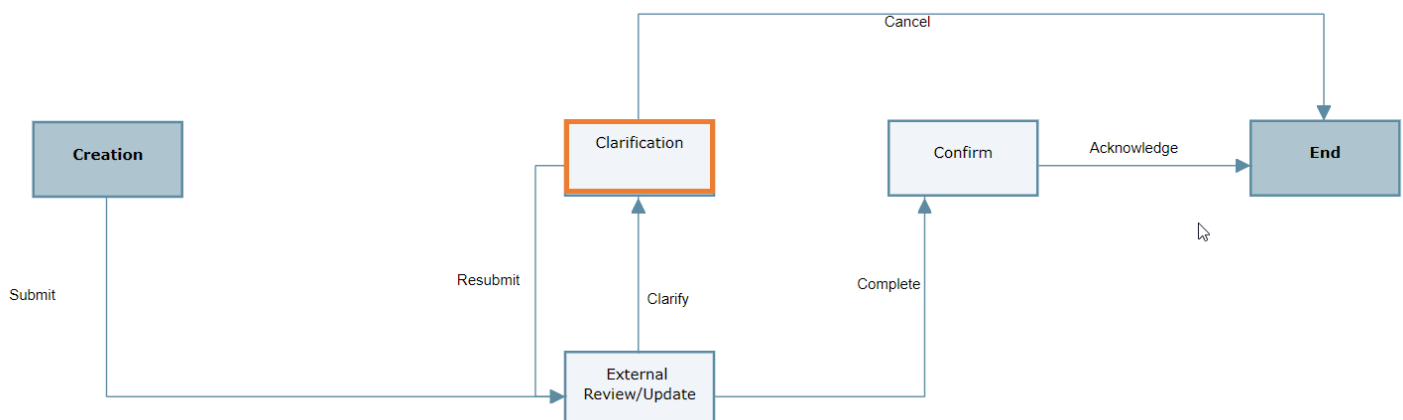
2.2.3 Clarify External RFI

User Roles

All Project User

Workflow Step Summary

If the reviewer requests clarification, the Initiator must review the comments and decide how to proceed. They can either Resubmit the updated RFI with the required clarifications or Cancel the request if it's determined that no further action is needed.



1. Click the Tasks option in the **Navigator**.

- Task Log** will show available records.

2. Double-click the Requests for Information BP with Sent for 'Clarification.'



- b. This will open the Risks pop-up window.

Tasks

Notifications

Drafts

Shell Access Request

Document Manager

Tasks

CreateActionsView: All Tasks

Origin	Business Process	Record Number	Title	Record Due	From	Sent for	Task Due	Received	Workflow Name
<input checked="" type="checkbox"/> Unifier Showcase Spr...	Requests for Information	RFI-000064	Test 02	08/07/2024 11:21 ...	Hariharanath Mag...	Clarification		06/27/2024 12:15 ...	WF02 - External
<input checked="" type="checkbox"/> Unifier Showcase Spr...	Requests for Information	RFI-000063	test	08/06/2024 04:45 ...	Soumitra Mandal ~...	Clarification		06/25/2024 04:47 ...	WF01 - Internal
<input checked="" type="checkbox"/> Unifier Showcase Spr...	Issues	ISS-000025	Test	08/05/2024 04:03 ...	Soumitra Mandal ~...	Monitor		06/24/2024 04:04 ...	WF01 - Issues V01

3. Click **Accept**.

- a. The page will refresh and show options to Send or Save.

Requests for Information

Decline More Actions **Accept**

Request For Information Related Records Technical Review Risks

4. Navigate to **Requests for Information** Tab, Complete the Mandatory field.

- a. **Questions or Clarifications**.

Other

Questions or Clarifications *

Enter 4000 or fewer characters.

Proposed Solution

5. Once all mandatory and optional fields for the Clarifications Step are complete, click **Send** at the top right of the form.

- a. The **Workflow Actions Details** pop-up window will display.
b. Users can also click **Save Draft** to revisit later.

Requests for Information

Save Draft More Actions **Send**

Request For Information Related Records Technical Review Risks

General

Record No Status


Attachments Comments Linked Records Workflow Progre > [Full Screen]

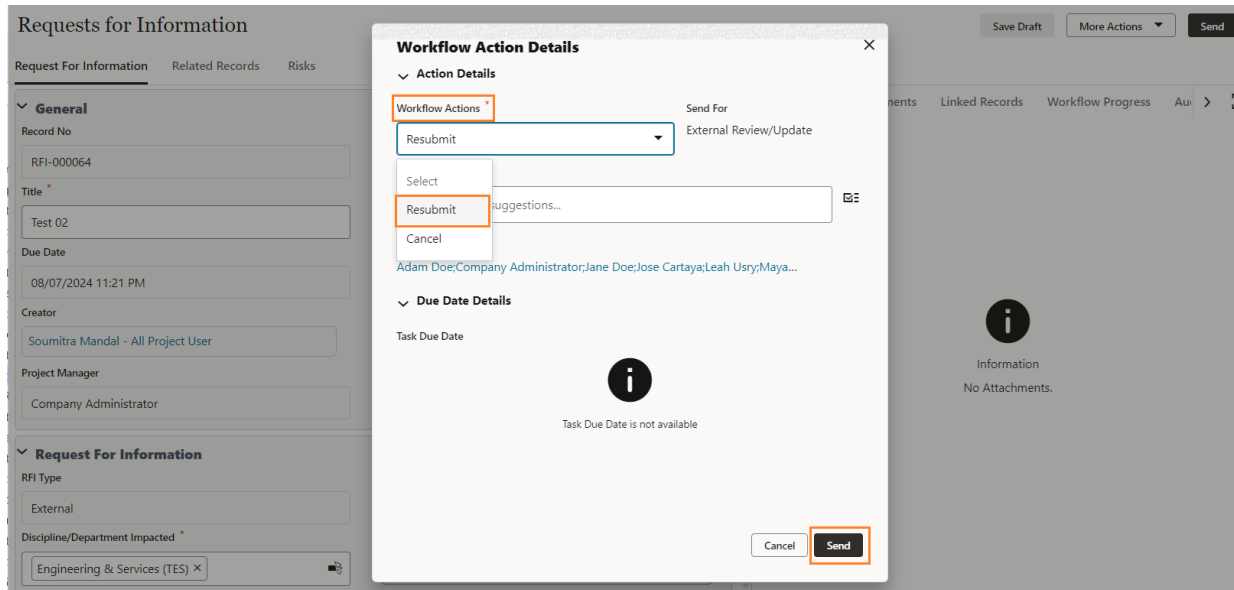
6. Select the Workflow Action.

- a. **Resubmit**: Select this workflow action if the record needs to be routed back to the Initiator for External Review/Update.
b. **Cancel**: Select this workflow to cancel the Requests For Information record and send for End.

7. Verify **Resubmit** as the Workflow Action.



8. In the **To** field click the text box ('Start typing for suggestions...') and type the name of the person(s) or group(s) to select the role to reassign the record to.
 - a. The assignees can be searched using the Select function  .



Requests for Information

Request For Information | Related Records | Risks

General

Record No
RFI-000064

Title *
Test 02

Due Date
08/07/2024 11:21 PM

Creator
Soumitra Mandal - All Project User

Project Manager
Company Administrator

Request For Information

RFI Type
External


Discipline/Department Impacted *
Engineering & Services (TES) X

Workflow Action Details

Action Details

Workflow Actions *
Resubmit

Send For
External Review/Update


Select
Resubmit suggestions... 

Cancel

Adam Doe;Company Administrator;Jane Doe;Jose Cartaya;Leah Usry;Maya...

Due Date Details

Task Due Date


Task Due Date is not available

Cancel Send

9. Click **Send**.



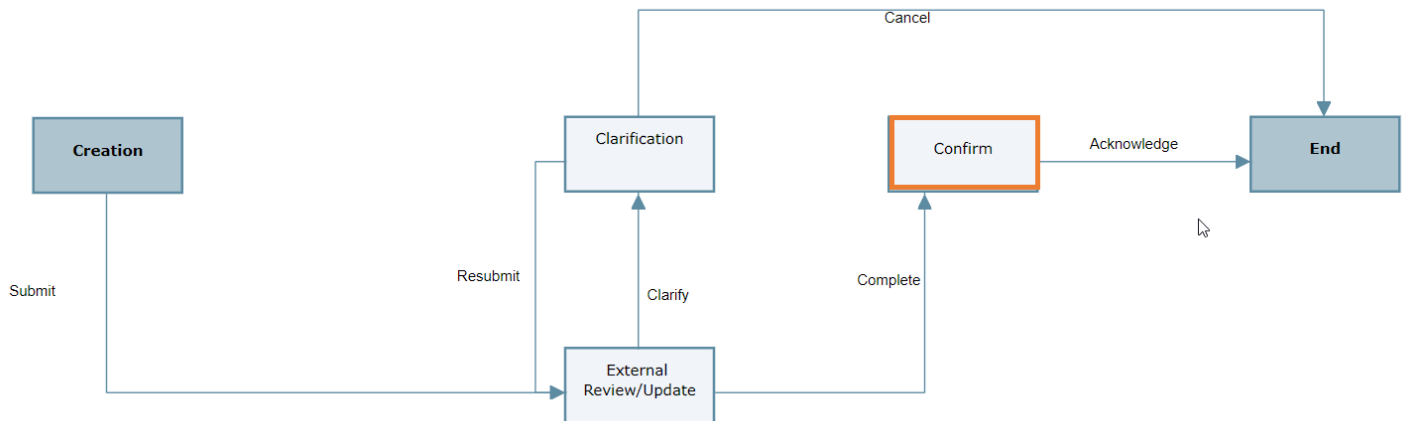
2.2.4 Confirm External RFI

User Roles

All Project User

Workflow Step Summary

Once the reviewer provides a response to the RFI, the Initiator is notified and must Confirm that the response has been received. This step acknowledges that the inquiry has been addressed.



1. Click the Tasks option in the **Navigator**.
 - a. **Task Log** will show available records.
2. Double-click the Requests for Information BP with Sent for 'Confirm.'
 - a. This will open the Requests for Information pop-up window.

Tasks

Notifications

Drafts

Shell Access Request

Document Manager

Tasks

Create Actions View: All Tasks

Origin	Business Process	Record Number	Title	Record Due	From	Sent for	Task Due
Unifier Showcase Spri...	Requests for Information	RFI-000062	RFI Ug TEST	08/06/2024 12:21 ...	Soumitra Mandal - ...	Confirm	
Unifier Showcase Spri...	Requests for Information	RFI-000063	test	08/06/2024 04:45 ...	Soumitra Mandal - ...	Clarification	
Unifier Showcase Spri...	Issues	ISS-000025	Test	08/05/2024 04:03 ...	Soumitra Mandal - ...	Monitor	
Unifier Showcase Spri...	Risks	RISK-011735	Risks UG 1	07/28/2024 10:50 ...	Soumitra Mandal - ...	Additional Review	

3. Click **Accept**. The page will refresh and show options to Send or Save.

Requests for Information

DeclineMore ActionsAccept

Request For InformationRelated RecordsRisks

Task Details

FromSoumitra Mandal - All Project User

AttachmentsCommentsLinked RecordsWorkflow ProgressAu>

4. As part of the Confirm Step, the Reviewer may also complete the following actions:
 - a. **Post Comments:** Add text comments that are like notes that accompany the Requests For Information record but do not become part of it. This field can be used to **provide clarification or document Recommendations made to the form.**
 - b. **Add Linked Records:** Create a link from one business process to another. This option is available only in BPs that have been designed to accommodate linked records. A user's ability to view a linked BP record is based on the user's permissions. If users cannot see the record in the log, they cannot see it in the link.



Requests for Information

Save Draft

More Actions ▾

Send

Request For Information Related Records Risks

General

Record No	Status
RFI-000064	Re_Submitted
Title	Priority
Test 02	High

Attachments Comments Linked Records Workflow Progress Au > []

5. Once all mandatory and optional fields for the **New Requests For Information** are confirmed, click **Send** at the top right of the form.
- The **Workflow Actions Details** pop-up window will display.
 - Users can also click **Save Draft** to revisit later.

Requests for Information

Save Draft

More Actions ▾

Send

Request For Information Related Records Risks

General

Record No	Status
RFI-000064	Re_Submitted

Attachments Comments Linked Records Workflow Progress Au > []

6. Verify **Acknowledge** as the Workflow Action.

7. In the **CC** field, the name of the person(s) or group(s) Automatically fetched to receive a notification.

Requests for Information

Save Draft

More Actions ▾

Send

Request For Information Related Records Risks

General

Record No	RFI-000064
Title	Test 02
Due Date	08/07/2024 11:21 PM
Creator	Soumitra Mandal - All Project User
Project Manager	Company Administrator

Request For Information

RFI Type	External
Discipline/Department Impacted	Engineering & Services (TES)

Workflow Action Details

Action Details

Workflow Actions *

Acknowledge ▾

Send For

End

CC

Adam Doe;Alex-Reid (Pwc);Ashley Comacho;Company Administrator;Deepa Prakash K...

Cancel

Send



Information
No Attachments.

8. Click **Send**.



2.3 Related Business Processes

The below section identifies any related objects that would be covered in other functional designs or project documentation.

Workflow Step	Summary
Risks	A Risk record in the Risk BP can be directly generated from a completed Request for Information (RFI) record. This integration ensures that any potential risks identified during the RFI process are seamlessly documented and tracked. By capturing risks at the point of discovery, the project team can proactively manage and mitigate them, reducing the likelihood of project delays or issues.
Issues	Request for Information (RFI) records can be linked to Issue records within the Issues BP in Unifier. This connection allows for the easy association of any problems or concerns identified during the RFI process with existing issues. It ensures that the resolution of these issues is informed by the detailed context provided in the RFI, improving the overall issue management process.
Action Items	Action Items can be generated from RFIs, creating a direct link between the information request and the subsequent tasks that need to be completed. This connection ensures that any follow-up actions required from the RFI are clearly tracked and assigned, promoting accountability and timely resolution of any matters arising from the RFI.
Design Change Notice	An RFI often serves to clarify or request additional information about specific project details. Once an RFI is resolved, it may become evident that a design change is necessary. The resolved RFI can be referenced in the Design Change Notice (DCN) BP, creating a clear audit trail that links the initial query to the resulting design modification. This linkage ensures transparency and consistency in how design changes are documented and justified.

2.4 BP & Document Manager

This business process is designed to automatically publish its records, along with comments and attachments, to the Document Manager at the **project shell only**. This produces a detailed audit trail of the recorded information through the business process (*for both workflow and non-workflow processes*). Users can open these records and their information by following the steps below.

1. In the left **Navigator**, click **Document Manager**.
2. Click **Documents**,
3. In the central pane, navigate to the following folder:
 - a. **Phase 5 - Monitoring & Controlling Phase >Requests For Information**

The screenshot shows the Document Manager interface. On the left, the 'Document Manager' folder is expanded, showing 'Documents', 'Recycle Bin', and 'Unpublished Documents'. The 'Documents' folder is selected. In the central pane, the breadcrumb path is 'Project Documents > Phase 5 - Monitoring & Controlling Phase'. Below the breadcrumb, there is a table of documents. The 'RFI' document is highlighted with an orange box. The table has columns: Name, Upload By, Upload Date, Location, BP, and Document URL.

Name	Upload By	Upload Date	Location	BP	Document URL
Training Materials			/Phase 5 - Monitoring & Controlling Phase		
Substations			/Phase 5 - Monitoring & Controlling Phase		
Submittals			/Phase 5 - Monitoring & Controlling Phase		
Schedule			/Phase 5 - Monitoring & Controlling Phase		
Safety			/Phase 5 - Monitoring & Controlling Phase		
Risks			/Phase 5 - Monitoring & Controlling Phase		
RFI			/Phase 5 - Monitoring & Controlling Phase		
Record of Decisions			/Phase 5 - Monitoring & Controlling Phase		
Quality			/Phase 5 - Monitoring & Controlling Phase		
Project Management Plan			/Phase 5 - Monitoring & Controlling Phase		

4. The generated .pdf workflow document will be named in the format **WF_Record Number_Record Title**



where “WF” is the BP workflow name, the “Record Number” is the Unifier-generated record number, and the “Record Title” is the title of the workflow record.

Documents

Home > Project Documents > Phase 5 - Monitoring & Controlling Phase > RFI

Create Actions View: (Modified) All

Name	Upload By	Upload Date	Location	BP	Document URL
Requests for Information_RFI-000062_RFI Ug TEST.pdf	Soumitra Mandal - All ...	06/25/2024 1...	/Phase 5 - Monitoring & Controlling Ph...		https://dv-unifier.southernco.com/unifier/li

Any files that were attached to the workflow will include the paper clip icon in the “BP” column if a the file is uploaded directly to the displayed Document Manager folder; it will not show the paper clip icon in the “BP” column.

Documents

Home > Project Documents > Phase 5 - Monitoring & Controlling Phase > RFI

Create Actions View: (Modified) All

Name	Upload By	Upload Date	Location	BP	Document URL
Requests for Information_RFI-000062_RFI Ug TEST.pdf	Soumitra Mandal - All ...	06/25/2024 1...	/Phase 5 - Monitoring & Controlling Ph...		https://dv-unifier.southernco.com/unifier/li

Users may sort the list of files at any level within the Document Manager folders by clicking on the column label. An indicator will be displayed on the right side of the sorted column. Re-clicking on a sorted column will re-sort the list in the opposite sort order (i.e., ascending to descending or descending to ascending).

Documents

Home > Project Documents > Phase 5 - Monitoring & Controlling Phase > RFI

Create Actions View: (Modified) All

Name	Upload By	Upload Date	Location	BP	Document URL
Requests for Information_RFI-000062_RFI Ug TEST.pdf		/25/2024 11:...	/Phase 5 - Monitoring & Controlling Phase...		https://dv-unifier.southernco.com/v

Sort Ascending

Sort Descending

Columns

Lock after this Column

Note: The Document Manager Location is the same for Both Internal and External Workflow.



3. Business Unit Guidance

This user guide offers baseline instructions. For localized guidance, users should visit their respective business unit portals (accessible via the link below).

[EPPM Training Homepage](#)

4. Appendix

4.1 Getting Help & Support

If user encounter any issues or require assistance, there are two primary channels available:

Business Unit Administrator	IT Support
For process-related inquiries or issues, users can reach out to the designated Business Unit Administrator. They are equipped to provide guidance and support specific to the business process within Oracle Unifier.	For technical issues or challenges beyond the scope of the Business Unit Administrator's expertise, users can contact IT Support. They can assist with platform-related technical difficulties, account access problems, or any other IT-related concerns.

4.2 Glossary of Terms

Here are some clear definitions for key concepts and terminology essential for navigating Oracle Unifier.

Field Clarification Request	A specific type of RFI used to request clarification or changes related to field operations. FCRs are often linked with the RFI BP to ensure field changes are properly documented and addressed.
Audit Trail	A record-keeping process that ensures all actions taken within the RFI process are documented, allowing for transparency and accountability.

4.3 Abbreviations and Acronyms

Here, users will find a handy reference list of commonly used abbreviations and acronyms throughout the user Oracle Unifier experience.

BP	Business Process
RFI	Requests For Information
FCR	Field Clarification Request

4.4 Frequently Asked Questions

**1. How do I create a new RFI record?**

To create an RFI, navigate to the Design and Construction section, click on Requests for Information, and select “Create.” Depending on the user role, the user may be prompted to choose an internal or external workflow. Fill in the required fields, including the title, due date, and any necessary details, then click “Send” to submit the RFI.

2. How do I link related records, like Risks or Action Items, to my RFI?

When creating or editing an RFI, navigate to the Related Records tab. Select the type of record user wants to link (e.g., Risk, Issue, Action Item, Design Change Notice), and use the “Select” function to add the reference. Remember that only one type of record can be linked at a time.

3. What should I do if I receive an RFI back for clarification?

If an RFI is returned for clarification, review the comments provided by the reviewer. Update the necessary fields in the RFI, particularly in the Questions or Clarifications section, and then resubmit the RFI for further review.

4. How can I track the status of an RFI I have submitted?

Users can track the status of RFI by navigating to the Tasks section in the Navigator. The task log will display all submitted RFIs, along with their status. Double-click on the RFI to view its workflow progress and any related updates.

5. Why was my RFI cancelled, and what should I do next?

An RFI may be cancelled if the reviewer determines it is a duplicate, unnecessary, or lacks sufficient information. Check the cancellation reason provided in the comments. If the RFI is still needed, user may need to create a new RFI with additional or corrected information.

6. How do I handle RFIs that require technical review?

For RFIs requiring technical review, navigate to the Technical Review tab and click “Add” to include the reviewer’s name, title, and recommendations. Once all details are complete, save the record and send it for further review or completion.

7. What is the difference between “Complete” and “Clarify” in the workflow options?

Selecting “Complete” indicates that all required information has been gathered, and the RFI can be finalized. “Clarify” is used when more information is needed from the initiator before the RFI can proceed, sending it back for additional input.

8. Why can’t I see linked records in the RFI?

Linked records are visible only if User have the appropriate permissions to view them. If User cannot see a linked record, check user role and permissions, or contact Business Unit Administrator for further assistance.

9. How do I reassign a record for clarification or review?

If the action is Clarify, type the name of the person or group in the To field. For Review, use the Select function to search for assignees. If Complete or Clarify is selected, the recipient defaults to the Initiator. For Cancel, respective reviewers will receive the notification.

10. Is the Document Manager location the same for both internal and external workflows?



Yes, the Document Manager location is the same for both internal and external workflows.

11. Will files uploaded directly to the Document Manager folder show the paper clip icon?

No, files uploaded directly to the Document Manager folder will not show the paper clip icon in the “BP” column.

12. How do I assign a risk owner?

In the Additional Risks Details Block, complete the mandatory and optional fields. Use the Risk Assigned to (Owner) field to select or type the name of the individual responsible for managing the risk.

13. Can multiple related objects be referenced in a single RFI record?

Yes, an RFI record can reference multiple related objects, such as Risks, Issues, Action Items, and Design Change Notices, to provide a complete picture of the situation.

14. What is the Difference between Internal Workflow and External Workflow?

Internal Workflow: This process is managed entirely within the organization. The initiator is responsible for reviewing the RFI (Request for Information) record.

External Workflow: This process involves external parties. A partner user is responsible for reviewing the RFI record.