RFIs & Submittals Module

The RFIs & Submittals Module provides companies a structured way to manage requests for information and submissions. The RFIs & Submittals Module makes our engineering document management system an easy to use, vendor-oriented submittal software. Use the Workflow+ module to create configurable schedule-driven workflows to automate a wide variety of review and approval processes employing submitted documents/drawings and change requests. Eliminate the constant flow of incoming and out-going emails, and connect submittals back to the original request. RFI & Submittal managers can establish user privileges, assign response tasks to specific users, and add due dates, ensuring the submission is responded to in a timely manner.

Module Key Features and Functions

- Attach files, videos, photos, and audio with RFIs/Submittals to better define a submission

- Automate the notification of new requests and data, or when changes are made to an RFI or submittal, via email or within the application

- Delegate assignments to users not originally part of the process

- Add/edit notes and comments correlated with a request

- Send official answers to requestors to close RFIs or submittals

- Structure workflows to review, collaborate and approve engineering submittal requests and data

- Keep all linked emails associated to a request or submittal

- Show schedule and cost impacts related to a RFI or submittal

- Create structured RFIs or submittals with any tablet device, without needing a mobile app

- Search for and review overdue RFIs or submittals on the Dashboard

- Track and report submissions by type, status, and vendor organization.

Historical RFI and Submittal Management

Historically, RFIs and submittals were tracked using spreadsheets. This has changed due to the availability of engineering document management platforms such as ImageSite and EngineBox. ImageSite and Engine-Box.com not only make it easy to manage requests and submittals, but can also help engineering and construction professionals save time and money, while improving the overall timeliness and quality of their responses.

RFI and Submittal Collaboration

Internally, the RFIs & Submittals Module allows teams within the organization to easily collaborate by providing users with a quick and organized way to handle information requests and submissions. Externally, RFIs and submittals are used to efficiently communicate with downstream contractors, vendors, and customers without needing to provide them access to information not relevant to their job functions.

The RFIs & Submittals Module is a great way to connect designers with third parties and customers. Using common documents and drawings and displaying entries (replies) from all parties permits all users to see and work with the same information and manage to visible timelines.

Attaching Files and Notes

Files related to RFIs or submittals are easily attached, eliminating the user's need to search for documents. Notifications can be sent letting project managers, document controllers, supervisors, and others of the receipt of a RFI or submittal. Notes can be added to keep a running record of user questions, comments, and changes to an RFI and can also be used to clarify information, as well as provide instructions for process participants. Notes threads associated to the submitted documents and requests are kept with the RFI or submittal for audit purposes.

Deadline Management

With this advanced RFIs & Submittals Module, project managers can associate specific deadlines with all submissions, with users notified of past due responses and shown in the Dashboard. Project managers can change the status of the RFI or submittal while adding information to the schedule which can impact costs while only users with management privileges can change deadlines.

Send an RFIs and Submittals Anywhere, Anytime

RFIs and submittals can be entered on-site from any tablet device to immediately request additional information pertinent to project and/or construction implementation. Adding pictures, videos, and audios to an RFI or submittal, from on-site, on the production floor, or at the customer office, allows for a better managed workflow for answering questions, and is much quicker than using paper.

Industry Applications

RFIs and submittals are common engineering processes used to collect requests and outside submissions for various production, construction, and facilities management projects. Submissions typically come from vendors, contractors and customers.
In several industries, such as AEC (Architecture, Engineering, and Construction) these submissions and their responses often form the basis for key audit trails of project steps taken or changes made.

Applications for Construction

RFIs are the mechanism for vendors, subcontractors, and owners to communicate with AEC project participants for questions, changes, and project modifications. Maintaining a disciplined, rigorous workflow to manage, track, and report on these requests ensures quicker responses, more accurate answers, and a reviewable audit trail should post-project questions arise. Allowing RFIs directly from the field speeds up the information flow and gives on-site project managers the full history of changes and comments based on project requests.

Manufacturing Submittals

Vendors and customers are constantly submitting drawings, documents, engineering change requests, material specifications, etc., and expect their submissions are not only recognized but are being processed. Ensuring engineering changes, drawing updates, and technical modifications are being worked on, as well as tracked, keeps customer submittals on-time and on-budget. Also, using a distinct response tracking and management tool not only provides third parties with transparency but the comfort in knowing their requests are being actioned.

Module Key Benefits

- Manage and track replies associated with RFIs and submittals for timely responses
- Generate answers and responses quickly with access to the information and files you need
- Easily control communications between downstream contractors/vendors and designers
- Create and manage deadlines to ensure projects are completed on time
- No need for mobile apps, just use your browser
- A closed loop process to manage markups and modifications to submittal files
- Allow third parties to submit from sites outside the company network eliminating need for VPNs or incoming emails
- Associate RFIs/Submittals to particular projects and improve the way the company manages submissions.