

## Overview of the SharePoint RFI/Submittal Process

- Contractor uploads or creates the RFI/Submittal on SharePoint
  - Security access: A/E, CMR, CO/CS, COR, PM/PS, and Supervisor have R/W (Park and Other Agency permission groups have read access).
- When the Current Responsible Party field is set to something other than CMR or Contractor the RFI is not visible to the Contractor group.
  - As various roles review the RFI/Submittal, in the properties form they change the Current Responsible Party field on the properties form to the role next in the review process.
  - An email is sent when the Current Responsible Party is changed by looking up associated email addresses in the Workflow Notification List.
- Once Submittal/RFI is ready to be issued the Current Responsible Party should be changed to Contractor
  - Only this issued version of the file is read accessible to the Contractor Group in addition to remaining the same accessibility as listed above to the other permission groups.
  - An email is sent to Contractor Group with a link to the document and folder.

## To use this SharePoint RFI Security/Automatic Email Notification Feature

- PM or PS needs to add email addresses for the RFI/Submittal groups listed in the Workflow Notification List (RFI – CMR, RFI – A/E, RFI – COR, RFI – Contractor)

Submittal - A/E	clifford_treeman@n
RFI - CMR	maggie_lourdes@cr
RFI - COR	craig_fisher@contra

- After team members have done their review/edits they need to change the “Current Responsible Party” field in the properties form to the group they would like an email with a link to the site/document sent.

The screenshot shows a SharePoint document library with a table of RFI documents. The document '083 Screen Dimensions at Raw Water Intake.pdf' is highlighted. To the left, the 'Edit Properties' form is open, showing the 'Current Responsible Party' field set to 'COR', which is circled in red. The form also shows the document name, title, RFI number (083), and RFI date (5/31/2011).

Type	Name	RFI Date	Current
	FirstDriveRecordmemo	4/29/2011	Contract
	083 Screen Dimensions at Raw Water Intake	5/31/2011	COR
	082 Drain Pipe Material at Pool's East End	5/31/2011	COR
	081 Raw Water Pile Layout	5/31/2011	A/E

**a) Hover over the document name: click on the box which appears to the left of file: ribbon appears: click Edit Properties.**

**b) Form appears: add information as required: change “Current Responsible Party” to the group you would like to send an email notification.**

Version: 4.0  
 Created at 5/31/2011 3:09 PM by Haneman, Colin  
 Last modified at 6/2/2011 8:50 AM by Jones, Jim