



Request For Inspection (RFI)

This section describes how customer RFIs are managed in the Accounts Receivables modules of ProjectVIEW

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1 RFI – Customer Certification

ProjectVIEW uses RFIs to certify a project's progress. There are two stages in this process:

Firstly, the progress file is created, usually through the web version of ProjectVIEW.

Secondly, the RFIs are reviewed, selected and the progress certified in the desktop client version of ProjectVIEW.

2 RFI registration through the web portal

RFIs can be registered in two procedures of the web portal:

2.1 Project Daily Progress

The first location where a RFI can be registered is in the project daily progress form:

The screenshot shows the 'New Projects Progress File' form. At the top, there is a navigation bar with menus: HOME, PROJECTS MENU, BUDGETS MENU, WIP/CCL, ACCOUNTING, INVENTORY, MACHINERIES MENU, ORDERG MENU, SUBCONTRACTORS, USERS, SETTINGS, and NEW PAGES. Below the navigation bar, the form title is 'New Projects Progress File'. A message reads: 'Please fill this form and click OK button to create a new projects progress file record. Click Cancel to return to the previous screen.' There are 'OK' and 'CANCEL' buttons at the top right. The form contains the following fields: T Date* (with a calendar widget showing 11/3/2020), Company, Branch, Project, SubProject, Unit, Department, Section, Done Percent, Qnt, Cost Accounts Value, BOQ Item, BOQ Qnt, Primavera Activity, Project Area, Project Site, Comments, and RFI. Each field has a dropdown arrow on the right side. At the bottom right, there are 'OK' and 'CANCEL' buttons.

Note

For more information, please refer to the “02 02 Daily Progress” manual.

2.2 Employee Daily Transactions

The second location where a RFI can be registered is in the employee daily transaction form:

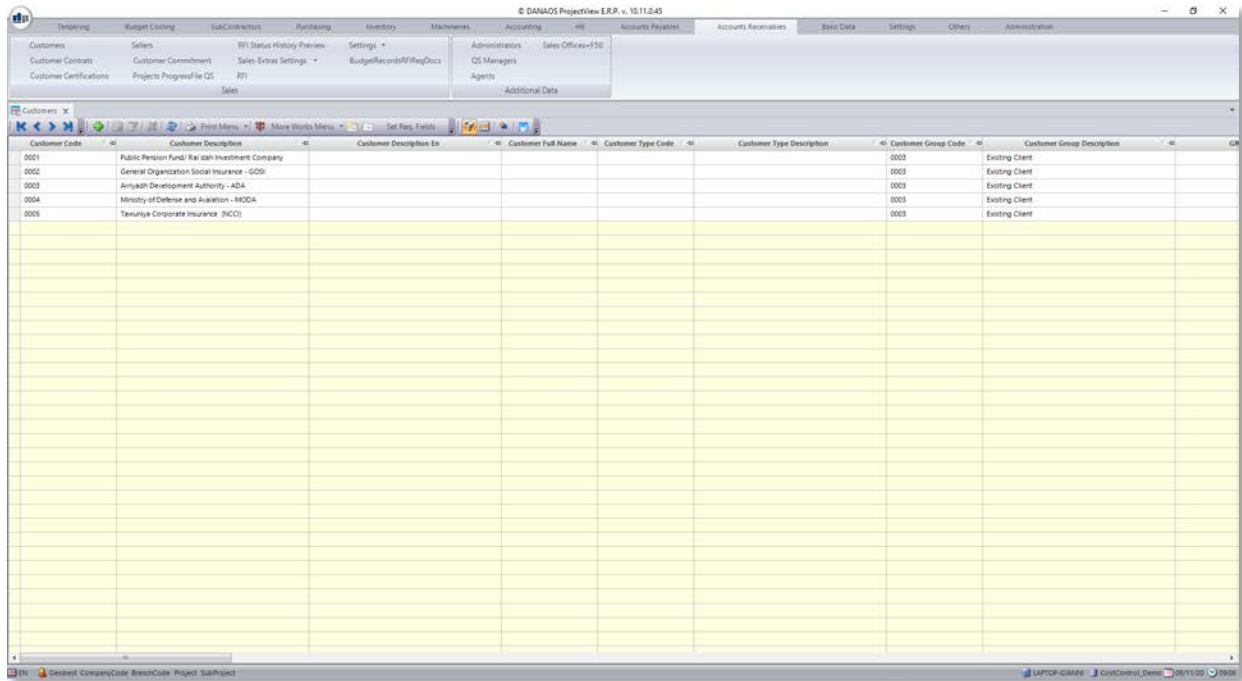
The screenshot shows the 'Employee Daily Transaction - Progress' form. The top navigation bar includes: HOME, PROJECTS MENU, BUDGETS MENU, PAYROLL, ACCOUNTING, INVENTORY, MACHINERIES MENU, ORDERS MENU, SUBCONTRACTORS, USERS, SETTINGS, NEW PAGES. The form title is 'Employee Daily Transaction - Progress'. Below the title, there are 'Save' and 'Record' buttons. A message states: 'Please fill this form and click OK button to create a new employee daily trans record. Click Cancel to return to the previous screen.' The form is divided into two main sections: 'MASS EMPLOYEE DAILY TRANS' and 'PROGRESS'. The 'MASS EMPLOYEE DAILY TRANS' section contains the following fields: T Date (with a calendar pop-up showing 11/11/2020), Project, SubProject, Unit, DepartmentCode, Section, Employee List, Number Of Hours, Number Of Over Time Hours, Cost Account Value, BOQ Line Item, BOQ Ord, Primavera Activity, Project Area, Project Site, and Comments. The 'PROGRESS' section contains: Progress Ord, Progress Percent, and Bill. There are 'CANCEL' and 'SAVE' buttons at the top right of the form.

Note

For more information, please refer to the *“08 02 Employee Daily Transactions”* manual.

To view a list of the customers, the user must navigate to:

“Accounts Receivables” > “Sales” > “Customers”



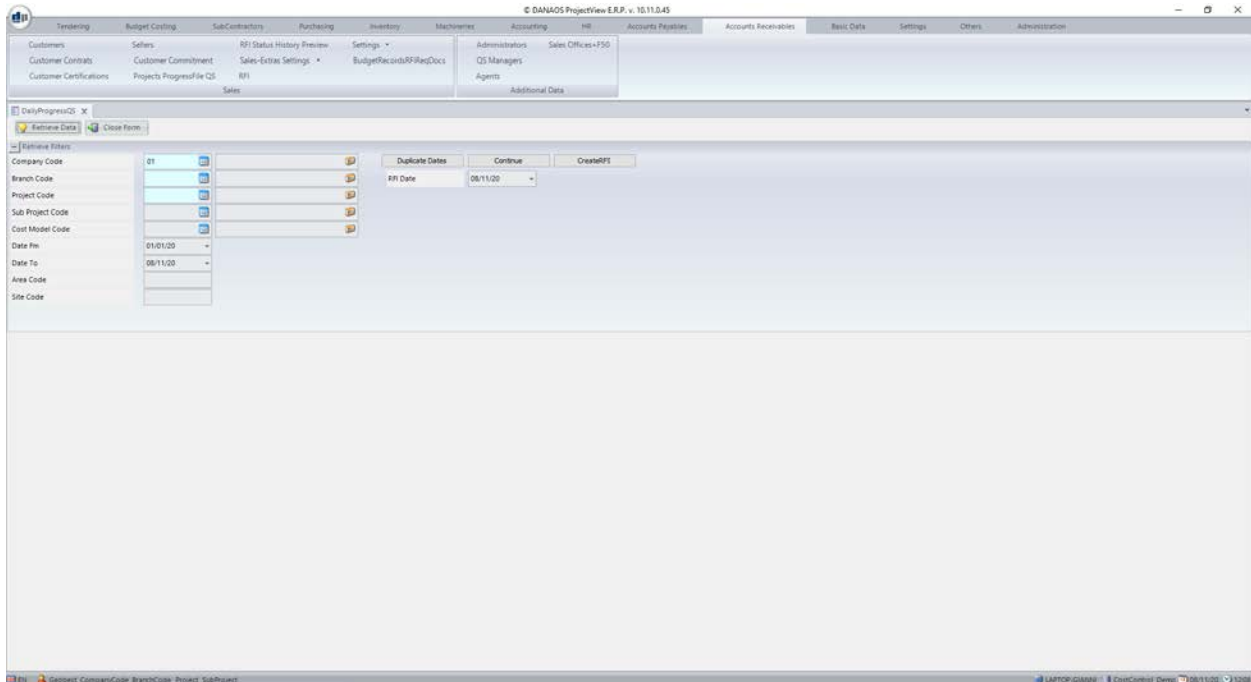
Editing or creating a new item will display the customer form.

3 Creating RFIs

RFIs are automatically downloaded and synched with the desktop client version. A user can review them at any time.

To review pending RFIs, the user has to navigate to:

“Accounts Receivables” > “Sales” > “Projects Progress File QS”



By using the parameters and clicking on the *“Continue”* button, a new window will be displayed containing the progress entries for a project.

T Date	Qnt	BOQItem	Qnt_Certif	BOQItemDescription	TotalQnt	RFI	SubProjectDescription	SelectForRFI	SelectForRFIDate	SelectForRFIUserCode
21/09/19	47	25.02.300.A	0	All excavation for fou	0	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	30/06/20	
23/09/19	47	25.02.300.A	0	All excavation for fou	0	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	29/06/20	
25/09/19	47	25.02.300.A	0	All excavation for fou	0	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	28/06/20	
27/09/19	47	25.02.300.A	0	All excavation for fou	0	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	28/06/20	
29/09/19	47	25.02.300.A	0	All excavation for fou	0	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	28/06/20	
01/10/19	47	25.02.300.A	0	All excavation for fou	0	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	28/06/20	
03/10/19	47	25.02.300.A	0	All excavation for fou	0	<input type="checkbox"/>		<input checked="" type="checkbox"/>	28/06/20	
05/10/19	47	25.02.300.A	0	All excavation for fou	0	<input type="checkbox"/>		<input checked="" type="checkbox"/>		
07/10/19	47	25.02.300.A	0	All excavation for fou	0	<input type="checkbox"/>		<input checked="" type="checkbox"/>		
09/10/19	47	25.02.300.A	0	All excavation for fou	0	<input type="checkbox"/>		<input checked="" type="checkbox"/>		
11/10/19	47	25.02.300.A	0	All excavation for fou	0	<input type="checkbox"/>		<input checked="" type="checkbox"/>		
08/04/20	20	25.02.300.A	0	All excavation for fou	20	<input type="checkbox"/>		<input checked="" type="checkbox"/>		
10/01/20	78	25.02.300.B	0	Engineering backfill w	0	<input type="checkbox"/>		<input checked="" type="checkbox"/>	17/06/20	
12/01/20	78	25.02.300.B	0	Engineering backfill w	0	<input type="checkbox"/>		<input checked="" type="checkbox"/>	28/06/20	
14/01/20	78	25.02.300.B	0	Engineering backfill w	0	<input type="checkbox"/>		<input checked="" type="checkbox"/>	01/07/20	
16/01/20	78	25.02.300.B	0	Engineering backfill w	0	<input type="checkbox"/>		<input checked="" type="checkbox"/>	01/07/20	
18/01/20	78	25.02.300.B	0	Engineering backfill w	0	<input type="checkbox"/>		<input checked="" type="checkbox"/>	01/07/20	
20/05/20	78	25.02.300.B	0	Engineering backfill w	0	<input type="checkbox"/>		<input checked="" type="checkbox"/>	01/07/20	
02/04/20	17	25.02.300.B	0	Engineering backfill w	17	<input type="checkbox"/>		<input checked="" type="checkbox"/>		

Each progress entry (each line in this last window) should have a BOQ Item associated with it. If it does not, a BOQ Item should be added. By doing so, the quantity in the progress entry will be used along with its *“Percent Done”* field to estimate the overall progress of the budget.

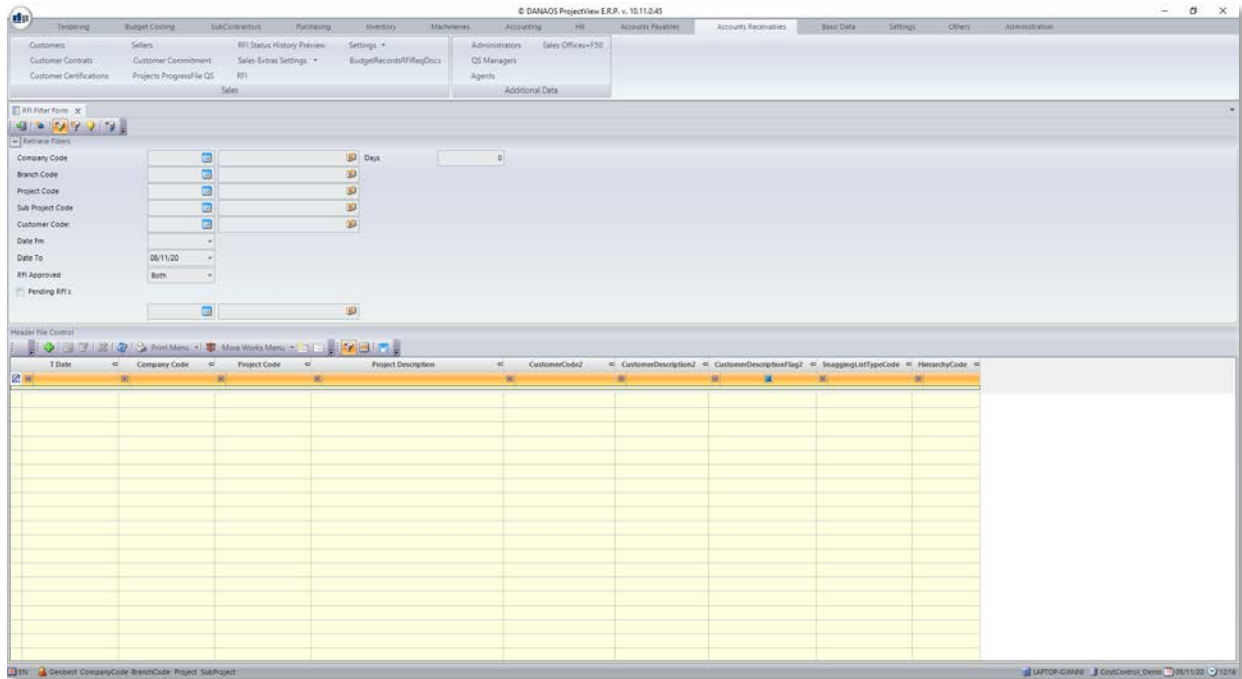
The user can select the entries, which will be selected for RFI by checking the respective *“Select For RFI”* checkbox and save. This will return the user to the previous grid.

Finally, the user must click on the *“Create RFI”* button to continue.

4 Editing RFIs

Once the RFI has been created as described earlier, the user can review the RFIs by navigating to:

“Accounts Receivables” > “Sales” > “RFI”



Double clicking on a RFI will display the RFI form.

4.1 RFI Form

The most important information regarding the RFI can be found in the “*Basic Data*” tab.

4.1.1 Basic Data

Item Code	Item Analytical Description	Item Unit Code	Qty	Amount	Amount	Amount	Amount	Status
25.03.300A	All excavation for foundation in any material must be done		17,000	0.00	0.00	0.00	0.00	0:0 Adjusted Eye
25.03.300B	Engineering backfill with material arising from excavation		76,000	0.00	0.00	0.00	0.00	0:0 Adjusted Eye
25.03.300A	Rates for measured work (in meter cubic) are deemed to i		10,000	0.00	0.00	0.00	0.00	0:0 Adjusted Eye
25.03.300B	Ground beams.		1,000	0.00	0.00	0.00	0.00	0:0 Adjusted Eye
Grid Summary Line Prompt			136,000	0.00	0.00	0.00	0.00	

The user must check the grid lines and set the quantity to the certified amount.

A “*Department Code*” should be added.

When the RFI has been checked and approved, the user should check the “*RFI Approved*” check box. When this is done, the system will add this RFI to the appropriate Customer Contract Certificate.

If there is no customer contract certificate, one will have to be created. Please refer to the “10 02 Customer Contracts & Certificates” manual for further information.

Note

There is also a “*Snagging List Type*” field. This allows the user to select a predefined snagging list (like a checklist) which all certificates of the contract will have to adhere to. Snagging lists can be created using the Accounts Payable module.

4.1.2 Approvals

This tab allows the user to approve or reject a RFI.

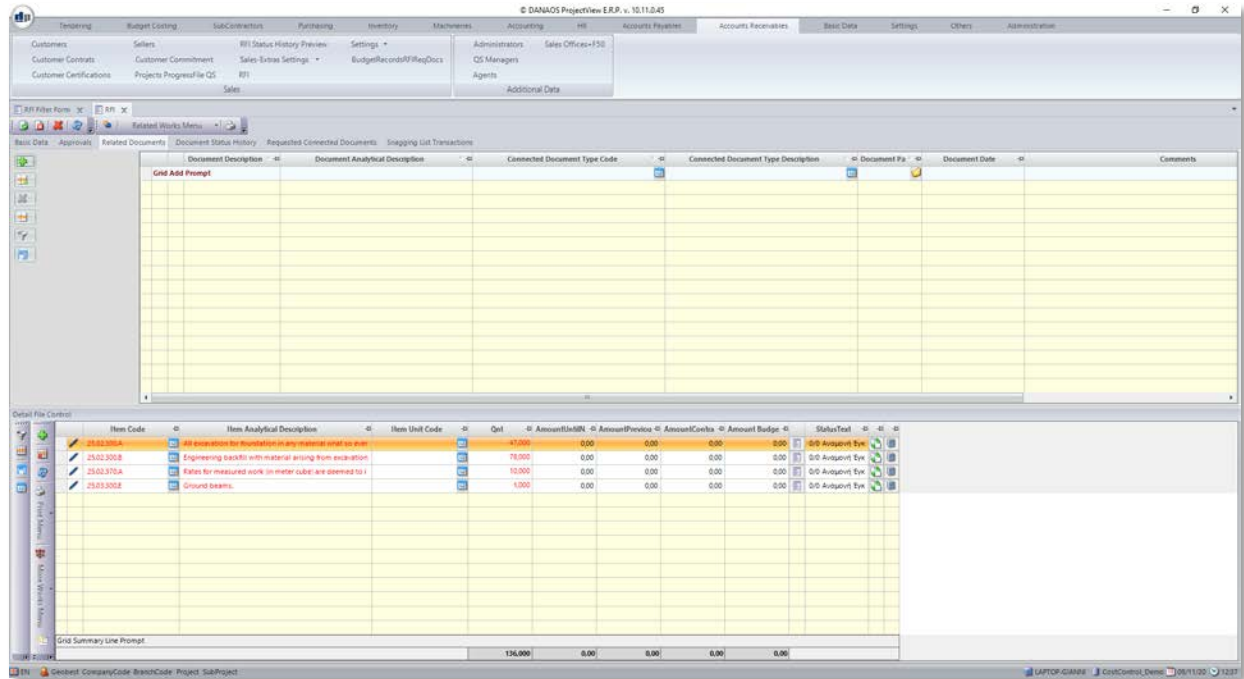
The screenshot shows the 'Approvals' tab in the ProjectVIEW ERP software. The main window is a grid for RFI approvals. The columns are: Level No, User Code, User Name, User Title Code, User Title Description, Acceptance, Rejection, Comments, AcceptanceUserCode, and AcceptanceDate. The grid is currently empty, showing only a 'Grid Add Prompt' in the first row.

Below the grid is a 'Detail File Control' section. It contains a table with the following data:

Item Code	Item Analytical Description	Item Unit Code	Qty	Amount (Elm)	Amount (Prev)	Amount (Cur)	Amount (Budg)	Status/Text
25.02.300A	All excavation for preparation of any material embankment		10,000	0.00	0.00	0.00	0.00	0.0 Approved Eye
25.02.300B	Engineering backfill with material arising from excavation		10,000	0.00	0.00	0.00	0.00	0.0 Approved Eye
25.02.300A	Rates for measured work in meter cubic are deemed to:		10,000	0.00	0.00	0.00	0.00	0.0 Approved Eye
25.03.300E	Ground beams		1,000	0.00	0.00	0.00	0.00	0.0 Approved Eye
Grid Summary Line Prompt				100,000	0.00	0.00	0.00	

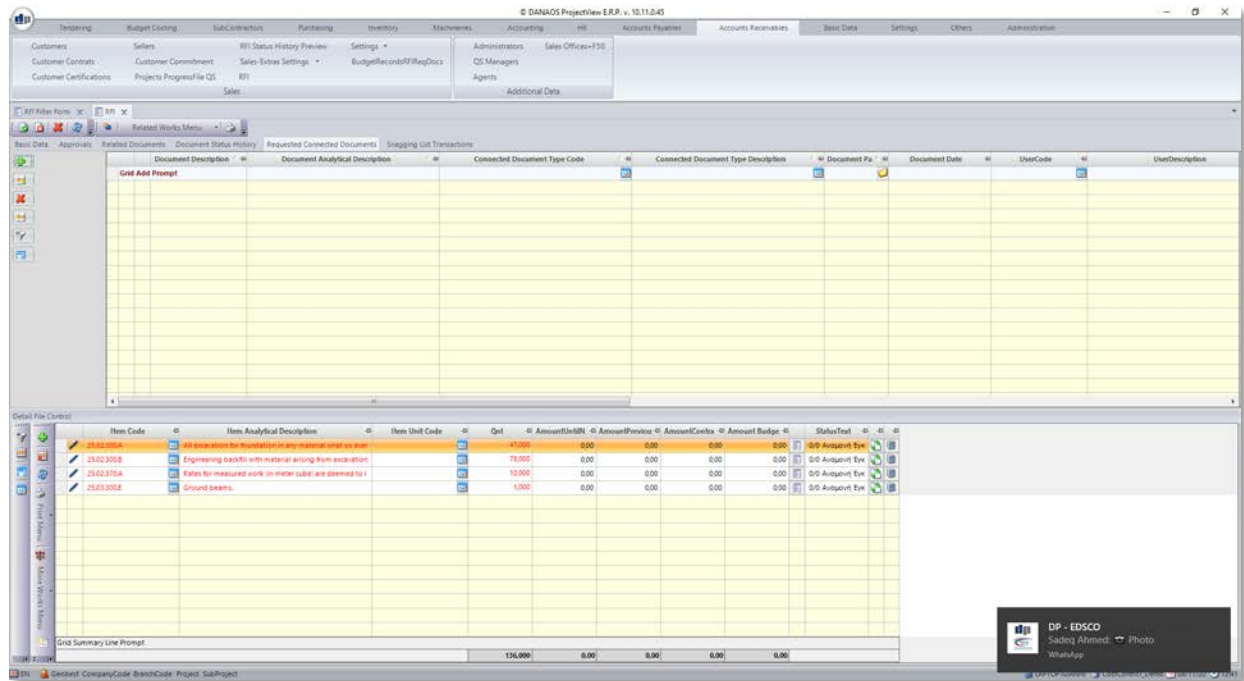
4.1.3 Related Documents

It is possible to associate a RFI with one or more documents (e.g. pictures). This tab allows for these documents to be associated with the RFI.



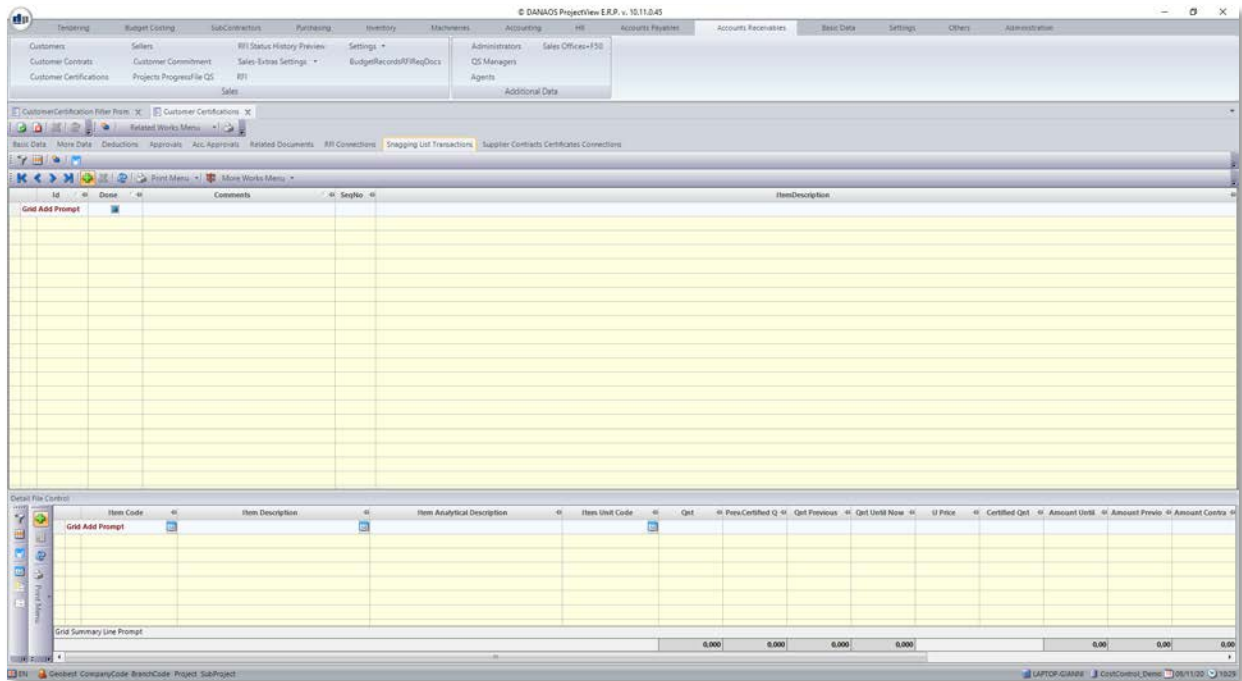
4.1.5 Requested Connected Documents

This tab allows for any documents requested by the customer to be associated with the RFI.



4.1.6 Snagging List Transactions

This tab allows the user to add a list of items needed to complete the works/items mentioned in the RFI.





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