The request for information (RFI) provides a forum for suppliers and buyers to communicate on quality issues. RFIs can be used in determining whether or not a supplier deviation request (SDR) is required. In fact, the Request For Information screen looks very similar to the Supplier Deviation Request screen with the exception of the bottom-most area.

Much like the SDR, corrective action, and direct disposition (DD) processes, the request for information is assigned a status. In order to advance statuses, users must have the required responsibility or role listed in their user profile.

Understanding the RFI screen

The Request For Information screen is made up of multiple areas that are used for specific purposes, as described below:

RFI Toolbar – this area displays the status of the request for information (RFI) document, contains buttons used to Save, Email, Route, Export, and Spell Check the RFI, and allows users to switch between the quality roles assigned to their user profile. A Lock for Edit icon appears when you view an existing RFI.

Header Information – this area contains information that applies to the entire request for information (RFI), such as the buyer and sourcing quality engineer names, the RFI number and creation date, and the business unit. Export control settings are also made in this area.

Other Information – this area contains additional information about the production of the item, such as the project name, shop order number, associated sub-supplier, and more. These fields are not required.

PO Information – this area contains a list of purchase orders that pertain to the request for information (RFI). For example, when an RFI is created from the Search Orders screen, the selected POs will be displayed in this area. The user can also manually add or remove POs from this area.

Supplier Information – this area contains the contact and location information for the supplier for whom the request for information (RFI) applies. The values available in the drop-down lists are based on the supplier and supplier locations assigned to your user profile.

Part Information – this area contains information about the item for which the request for information (RFI) was created. The item number, item description, and item revision fields are added for you when the RFI is created from a purchase order.

Attachments – this area allows users to add files to the request for information (RFI). Users can view or delete attachments. Once the RFI has been saved, it must be locked in order to add or remove attachments.

Information Request – this area is where questions are asked and answers are posted. When the document is saved the comments are moved to the view-only box at the bottom of this area along with the user's name and a date and time stamp.

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Creating an RFI

There are two ways to create an RFI: [1] from an existing purchase order or [2] as a stand-alone document which can later be associated to a PO. In either case, the following required fields must be entered in order to save the RFI: Supplier Name, Supplier Number, Contact Name, Business Unit, Buyer Name, Sourcing Quality Engineer, Item #, and Information Request.

Creating an RFI from a Purchase Order

When an RFI is created from a purchase order line, information pertaining to the item, such as **Item #** and **Item Description**, is transferred to the RFI. Additionally, the purchase order(s) you selected are added to the PO Information area. To create a new RFI from a purchase order line:

1. Click **Purchase Orders**, then **Search Orders** from the X.PC menu and locate the purchase order line(s) that you would like to associate to the RFI.

2. Hover over the arrow to the left of the purchase order line and choose **Create Request for Information** from the context menu.

   or

   Check the box(es) next to each line you would like to add to the RFI, select `Create Request for Information` from the **Choose an Action...** drop-down list, and click **Go**.

Note: In order to create an RFI for multiple purchase order lines, the following conditions must be met: the purchase order lines [1] have been created for the same supplier/supplier location and [2] the operating unit, buyer, and item are the same.

3. Complete the required fields.

4. Click **Save**.
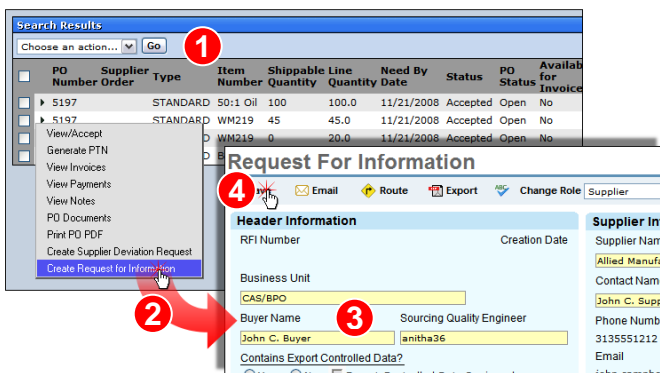
Creating a Stand-Alone RFI

When an RFI is created as a stand-alone document, there are more details that need to be entered before it can be saved. To create a new RFI from scratch:

1. Click **Engineering Quality**, then **Create Request For Information** from the X.PC menu.

2. At a minimum, complete the required fields.

Note: Other required fields, such as **Item Description** and **PO Number**, will eventually need to be completed before the RFI can be placed into the `CLOSED` status.

3. Click **Save**.

Understanding Statuses and Requirements

The RFI status tells you if the question has been submitted (`INITIATED`) or an answer has been received (`CLOSED`):
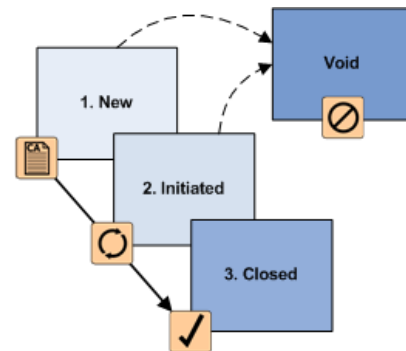
In order to change the status of an RFI, you must ensure that certain criteria are met:

Status	Description
NEW	The RFI has just been created but not submitted to the buyer organization. Prerequisites: • Required fields have been completed.
INITIATED	Email notifications are sent and the RFI is turned over to users from the buyer organization for input. Prerequisites: • All previous requirements.
CLOSED	The RFI process is finished. No changes or additional comments can be left. Prerequisites: • All previous requirements. • Select the Export Control setting. • Add part information. • Add at least one PO. • Add a response.

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Status	Description
VOID	The RFI is no longer required. It can be voided so long as the RFI has not reached the CLOSED status.

Changing the Status of an RFI

In the instructions below, an RFI will be initiated by a supplier. When the RFI is initiated, the buyer and SQE associated with this document will be notified via email. To change the status of an RFI:

1. Locate, view, and lock the RFI that you would like to initiate.

2. Scroll to the bottom of the screen.

3. Choose INITATED from the drop-down list below and click **Go**. The screen will be refreshed, the status is changed, and the RFI is unlocked.

Note: In the graphic above, the user is a supplier. Suppliers cannot close RFI documents.

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