ELECTRONIC DOCUMENT MANAGEMENT SYSTEM BULL DING This card must DFCM User's Guide

For Questions Contact:

Gail Youngblood (gyoungblood@utah.gov; 801.538.3708) Logan Brown (loganb@wc-3.com; 801.547.8133)



Guide Intent

☐ This User's Guide is intended to assist DFCM employees in understanding how to use the DFCM EDMS. The following user types will be referenced throughout the User Guide...

PM – DFCM Project Manager

AD - DFCM Administrator

DP – Design Professional

BO – DFCM Building Official

PR – Assigned Plan Reviewer

IN – Code Inspector



Table of Contents

General Steps:

- 1. Begin a new project (PM)
- 2. Accept application (AD)
- 3. <u>Upload documents</u> (**DP**)
- 4. Verify complete submittal (PM)
- 5. Assign plan reviewers (BO)
- 6. Perform review (PR)
- 7. Revise & resubmit (DP)
- 8. <u>Issue permit</u> (BO)
- 9. Perform inspections (IN)
- 10. Issue final or C.O. (BO)

Miscellaneous Items:

- A. EDMS Process
- B. Help menu
- C. Change password
- D. See all projects
- E. Check current status
- F. Access/create reports
- G. Archiving



Application

#1 Application for Project

DFCM Project Manager Completes and submits New Application Form

#2 Application Reviewed

DFCM Administrator

Checks application and makes sure users are properly assigned First Submittal

#3 First Submittal

Architect/Engineer

Uploads the First Submittal, lists Deferred Items, completes the Special Inspection Form, and lists Structural Observations

#4 First Submittal Review

DFCM Project Manager

Ensures the First Submittal is correct, making changes if needed

#5 Plan Reviewers
Assigned
DFCM Building Official

Plan Review

#6 Plan Review

Reviewers

Plan Review begins: If the plans require corrections, comments are issued, otherwise approval letters are uploaded

#7 Resubmittal

Architect/Engineer

Should corrections be required, the Architect is notified and asked to upload a new submittal

#8 Permitted
DFCM Building Official

When a Submittal Phase or Deferred Item is Accepted, and a Final Set has been uplaoded, the Building Official uploads the Permitted Docs Inspections & CO

#9a Inspections
Start

DFCM Building Official Building Official assigns Inspectors

#9b Inspection Reports Uploaded

Code Inspectors

Code Inspectors upload daily and final inspection reports

#10 CO Issued

DFCM Building Official

Building Official issues a CO when all requirements have been met



☐ The DFCM Project Manager (PM) logs into the EDMS...

DFCM <i>v2</i>	Division of Facilities Constructions and Management State of Utah Department of Administrative service
	Login Help
Division of Facilities Construction & Management	E-Mail Password Login If you've forgotten your password, enter only your e-mail address and press Login.
Need help? Please contact Gail Youngblood at (801) 538-370	8 or gyoungblood@utah.gov. DFCM v2.1.4 ©2012 West Coast Code Consultants, Inc.

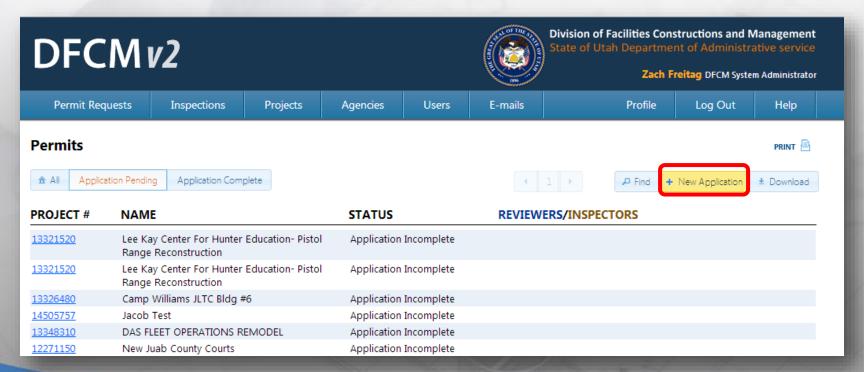


☐ The default screen displays all active projects currently assigned to that PM. Click on "Permit Requests" in the upper left tab to submit a new permit request.



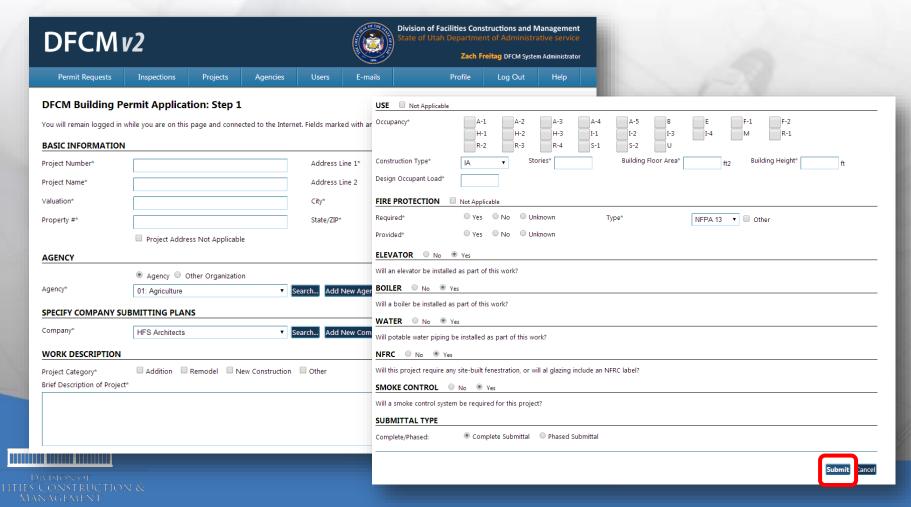


☐ This screen lists permit requests that have not yet been accepted by the Administrator. Click on the "+ New Application" button on the right side of the screen.





☐ The PM then needs to fill out the permit application and click on the "Submit" button once the application is completed.



After submitting the application the PM needs to list the Design Professional (DP). Once completed an automatic email notification will be sent to the DFCM Administrator (AD).

DFCM <i>v2</i>						Division of Facilities Constructions and Management State of Utah Department of Administrative service Zach Freitag DFCM System Administrator				
Permit Requests	Inspections	Projects	Agencies	Users	E-mails		Profile	Log Out	Help	
DFCM Building Permit Application: Step 2										
You will remain logged in	while you are on this	page and conne	cted to the Interne	et.						
PROJECT CONTACT CONTRACTOR: HFS ARCHITECTS										
The person specified here will be given priviledges to upload submittals on behalf of HFS Architects . They will receive instructions for logging in and submitting documents after a DFCM Administrator has approved the permit request.										
Contact Name*	Jim Moore (435)	734-9700	▼ S	earch Add N	New Contact	1 st				
SUBMITTAL PHASES Complete Submittal (No Complete Submittal	Phases)		Edit							
							2 nd	1		
							Submit	for Approval	Revise Step 1	



Application

#1 Application for Project

DFCM Project Manager Completes and submits New Application Form

#2 Application Reviewed

> DFCM Administrator Checks application and

makes sure users are properly assigned First Submittal

#3 First Submittal

Architect/Engineer

Uploads the First Submittal, lists Deferred Items, completes the Special Inspection Form, and lists Structural Observations

#4 First Submittal Review

DFCM Project Manager

Ensures the First Submittal is correct, making changes if needed

#5 Plan Reviewers
Assigned
DFCM Building Official

➤ Plan Review

#6 Plan Review

Reviewers

Plan Review begins: If the plans require corrections, comments are issued, otherwise approval letters are uploaded

#7 Resubmittal

Architect/Engineer

Should corrections be required, the Architect is notified and asked to upload a new submittal

#8 Permitted
DFCM Building Official

When a Submittal Phase or Deferred Item is Accepted, and a Final Set has been uplaoded, the Building Official uploads the Permitted Docs Inspections & CO

#9a Inspections
Start

DFCM Building Official Building Official assigns Inspectors

#9b Inspection Reports Uploaded

Code Inspectors

Code Inspectors upload daily and final inspection reports

#10 CO Issued

DFCM Building Official

Building Official issues a CO when all requirements have been met



☐ The AD will receive an automated email once the permit request has been completed notifying them to review the request.





☐ The AD will first need to login to access the permit request screen.

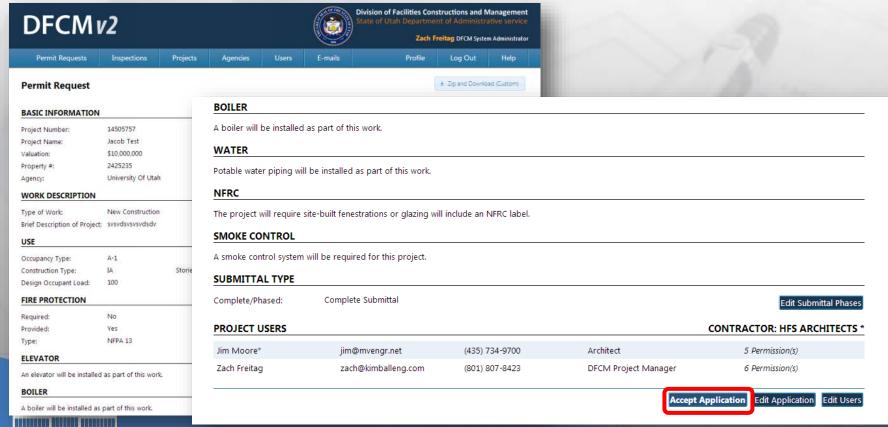
DFCM <i>v2</i>	Division of Facilities Constructions and Management State of Utah Department of Administrative service
	Login Help
Division of Facilities Construction & Management	Sign Up E-Mail Password Login If you've forgotten your password, enter only your e-mail address and press Login.
Need help? Please contact Gail Youngblood at (801) 538-37	08 or gyoungblood@utah.gov. DFCM v2.1.4 ©2012 West Coast Code Consultants, Inc.



☐ Click on the "Permit Requests" tab to see complete applications. Then click on the particular project for the permit request in question. The AD then verifies that all needed information has been provided, including the Design Professional (DP).



☐ If complete, the AD clicks on the "Accept Application" button at the bottom of the screen. An automatic email is then sent to the DP notifying them that they can now upload the project documents.



Application

#1 Application for Project

DFCM Project Manager Completes and submits New Application Form

#2 Application Reviewed

DFCM Administrator

Checks application and makes sure users are properly assigned

► First Submittal

#3 First Submittal

Architect/Engineer

Uploads the First Submittal, lists Deferred Items, completes the Special Inspection Form, and lists Structural Observations

#4 First Submittal Review

DFCM Project Manager

Ensures the First Submittal is correct, making changes if needed

#5 Plan Reviewers Assigned DFCM Building Official

Plan Review

#6 Plan Review

Reviewers

Plan Review begins: If the plans require corrections, comments are issued, otherwise approval letters are uploaded

#7 Resubmittal

Architect/Engineer

Should corrections be required, the Architect is notified and asked to upload a new submittal

#8 Permitted

DFCM Building Official

When a Submittal Phase or Deferred Item is Accepted, and a Final Set has been uplaoded, the Building Official uploads the Permitted Docs

Inspections & CO

#9a Inspections Start

DFCM Building Official Building Official assigns Inspectors

#9b Inspection Reports Uploaded

Code Inspectors

Code Inspectors upload daily and final inspection reports

#10 CO Issued

DFCM Building Official

Building Official issues a CO when all requirements have been met

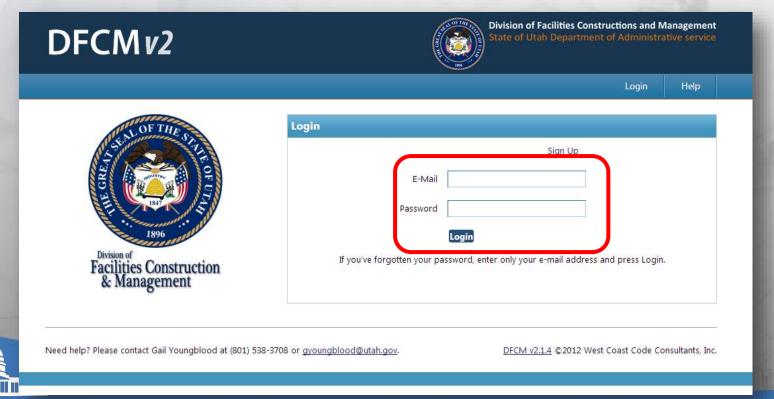


☐ The DP and PM will receive an automated email once the permit request has been accepted by the AD.





☐ If it is the first time using the system, the DP should now log into the EDMS and type in their email address and temporary password that was provided in an email from the system. A permanent password will be provided after logging in the first time.

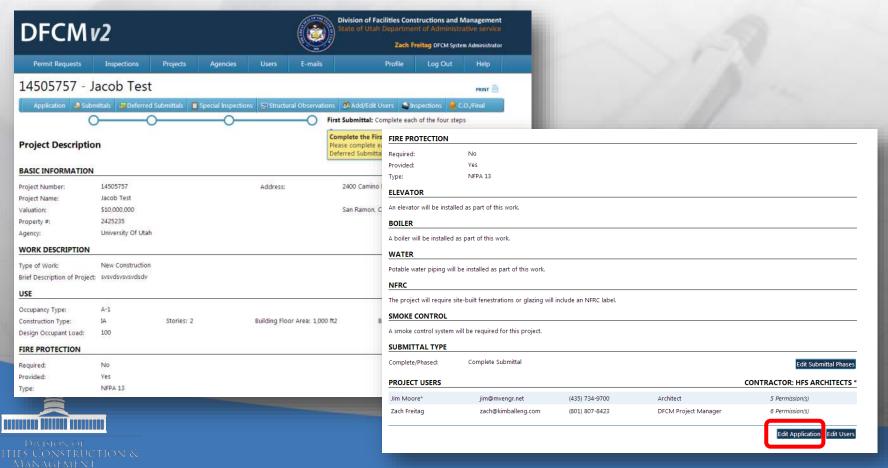


Once logged into the system the DP will see a list of projects assigned to them. Simply click on the DFCM number for the project in question.

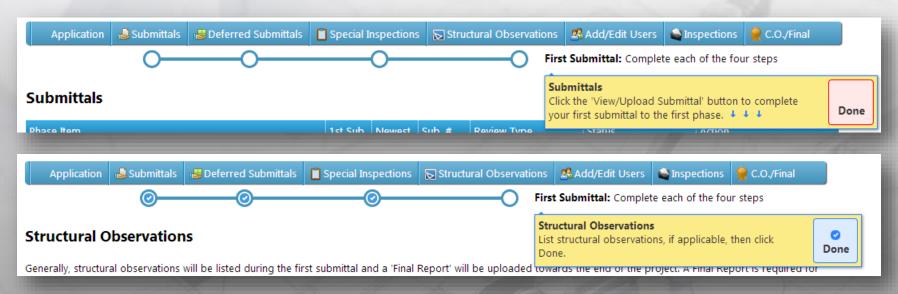




☐ The first screen you will see includes the building permit application. If any of this information is incorrect you can update it by clicking the "Edit Application" button at the bottom of the screen.

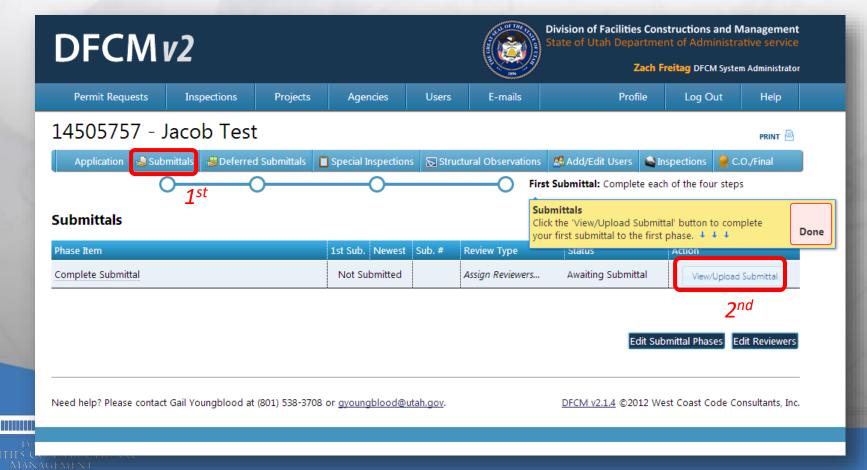


☐ It is important for the DP to know that there are four steps to uploading a new project. The EDMS walks you through each one of those steps as shown below. No one will be notified that a partial submittal has been uploaded. All four steps must be completed.





☐ To upload the construction documents to the EDMS click on the "Submittals" tab at the top of the screen and then click on the "View/Upload Submittal" button under the "Action" tab.



□ To add a new submittal click on the "+ New Submittal" button on the right-hand side of the screen. In this screen you can now upload the construction documents. Each set of submittals that are uploaded to the EDMS may be accompanied with a transmittal letter listing the items that are uploaded, but this is not required.

REVIEWS ♣ New Comment ⚠ Modify Reviewers							dify Reviewers			
Review Type	Ву			Status	History	History				
	Not Assigned		Awaiting Submittal							
SUBMITTAL	S						+	New Submittal	€ Expand	♪ Collapse
Submittal #	Status	Date	Files	Ву		Regarding			Action	
Need help? Please contact Gail Youngblood at (801) 538-3708 or gyoungblood@utah.gov . DFCM v2.1.4 © 2012 West Coast Code Consultants, 1						onsultants, Inc.				



After uploading all necessary documents for that particular submittal (i.e. plans, calculations, specifications, energy/geotechnical reports, etc.) *please click on the checkbox noting that the submittal is complete*. If this is not done the system will think that additional items need to be uploaded to that particular submittal and the process cannot be completed.

Complete Submittal:

Yes

Complete a submittal when you are sure that all files for this submittal have been provided.

The next page shows the submittals screen.



DFCM v2



Division of Facilities Constructions and Management State of Utah Department of Administrative service

Zach Freitag DFCM System Administrator

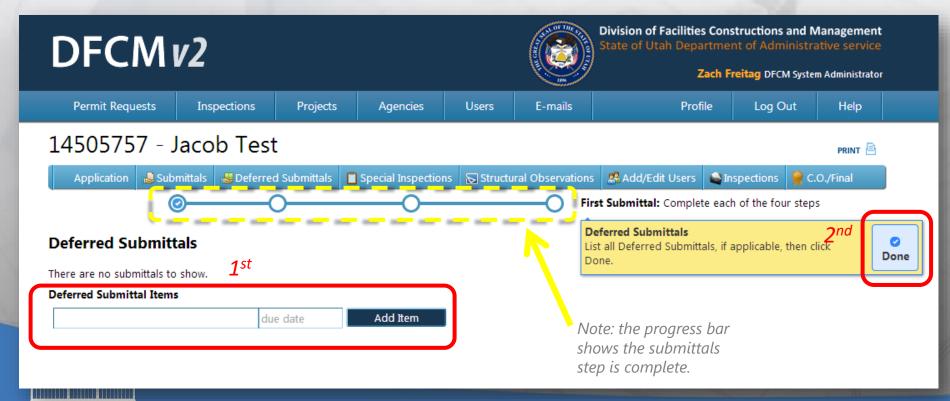
Permit Requests **Projects Profile** Inspections Agencies Users E-mails Log Out Help 14505757 - Jacob Test PRINT 🖹 Application Submittals Deferred Submittals 🖺 Special Inspections 🤝 Structural Observations 🚜 Add/Edit Users 😭 Inspections 🦃 C.O./Final First Submittal: Complete each of the four steps **Upload First Submittal** Complete Submittal: Submittal #1 (New) Add and select files for upload. Check 'Complete Submittal' to indicate no more files will be added, and then click 'Upload Files'. 1st UPLOAD SUBMITTAL DOCUMENTS ♣ Add More Files File Type Description Remove Transmittal Letter • Choose File | Transmitta...etter.pdf Transmittal Letter.pdf Plans • Choose File Plans.pdf × Plans.pdf Structural Calculations • Choose File | Structural...tions.pdf × Structural Calculations.pdf Choose File | Geotechni...port.pdf × Geotechnical Reports • Geotechnical Report.pdf Specifications • Choose File | Specifications.pdf × Specifications.pdf Choose File | Energy Co...orts.pdf × Energy Reports • Energy Compliance Reports.pdf UPLOAD OPTIONS Related to Review(s): reviewers are notified. Otherwise, the checked reviewers will be notified when this submittal is complete. **2**nd Yes Complete Submittal: complete a submittal when you are sure that all files for this submittal have been provided. 3rd Remember to mark the upload 'Complete Submittal' if it's complete. You can also mark it from the submittal summary page by clicking the 'View' button. ▼ Upload Files Need help? Please contact Gail Youngblood at (801) 538-3708 or gyoungblood@utah.gov.

After the files have been uploaded to the system the DP will see the following screen. Simply click on the "Click here" hyperlink to continue on to Step 2 of the submittal process.



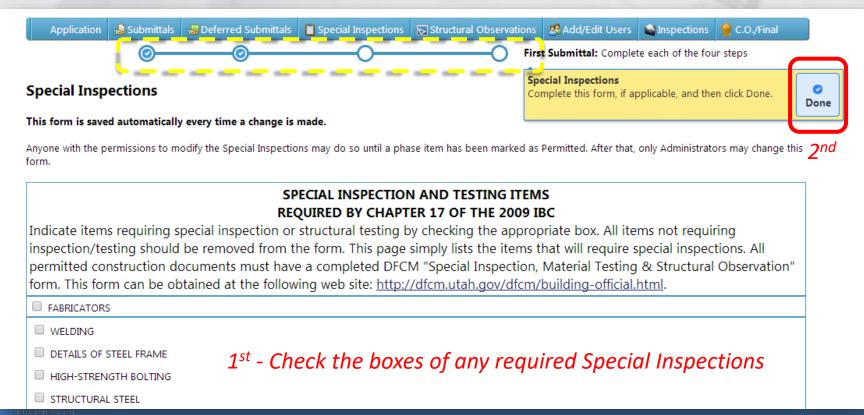


☐ The DP is then taken to the "Deferred Submittals" screen. At this point all deferred submittals should be noted. If deferred submittals do not apply to this project the "Not Applicable" button should be selected.





☐ The DP is then taken to the "Special Inspections" screen. At this point all special inspections required for the project should be noted. If special inspections do not apply simply select "Not Applicable".



The DP is then taken to the "Structural Observations" screen. At this point all structural observations should be noted. If observations do not apply to this project the "Not Applicable" button should be selected.

Application Submittals Deferred Submittals Special Inspections Structural Obse	servations Add/Edit Users Inspections 🥷 C.O./Final	
<u> </u>	First Submittal: Complete each of the four steps	
Structural Observations	Structural Observations List structural observations, if applicable, then click Done.	O Done
Generally, structural observations will be listed during the first submittal and a 'Final Report' will be uplo a Certificate of Occupancy unless Structural Observations were originally marked as N/A.	oaded towards the end of the project. A Final Report is required	2nd
OBSERVATION ITEMS		_
	Add Item 1 St	



After all four submittal steps has been completed (1. Submittals; 2. Deferred Submittals; 3. Special Inspections; & 4. Structural Observations) the screen will notify you that the submittal was successfully uploaded and an automated email will be sent to the DFCM PM informing them that these files are now in the system.

DFCM: First Submittal Completed by Architect

DFCM: First Submittal Completed by Architect

Project Number: 14505757 Project Title: Jacob Test Agency: University Of Utah Date: 2014-05-09 15:38:26

The first submittal for the project referenced above has been submitted for review.

Project Manager: Please login to review and approve this submittal.

URL: http://dfcmdev.eprocess360.com/project/view/440



Application

#1 Application for Project

DFCM Project Manager Completes and submits New Application Form

#2 Application Reviewed

DFCM Administrator

Checks application and makes sure users are properly assigned

► First Submittal

#3 First Submittal

Architect/Engineer

Uploads the First Submittal, lists Deferred Items, completes the Special Inspection Form, and lists Structural Observations

#4 First Submittal

Review

DFCM Project Manager

Ensures the First Submittal is correct, making changes if needed

#5 Plan Reviewers Assigned

DFCM Building Official

➤ Plan Review

#6 Plan Review

Reviewers

Plan Review begins: If the plans require corrections, comments are issued, otherwise approval letters are uploaded

#7 Resubmittal

Architect/Engineer

Should corrections be required, the Architect is notified and asked to upload a new submittal

#8 Permitted

DFCM Building Official

When a Submittal Phase or Deferred Item is Accepted, and a Final Set has been uplaoded, the Building Official uploads the Permitted Docs

Inspections & CO

#9a Inspections Start

DFCM Building Official Building Official assigns Inspectors

#9b Inspection Reports Uploaded

Code Inspectors

Code Inspectors upload daily and final inspection reports

#10 CO Issued

DFCM Building Official

Building Official issues a CO when all requirements have been met



After the submittals have been uploaded the PM will receive an automated email notifying them to review the submittals for completeness.

DFCM: First Submittal Completed by Architect

DFCM: First Submittal Completed by Architect

Project Number: 14505757 Project Title: Jacob Test Agency: University Of Utah Date: 2014-05-09 15:38:26

The first submittal for the project referenced above has been submitted for review.

Project Manager: Please login to review and approve this submittal.

URL: http://dfcmdev.eprocess360.com/project/view/440

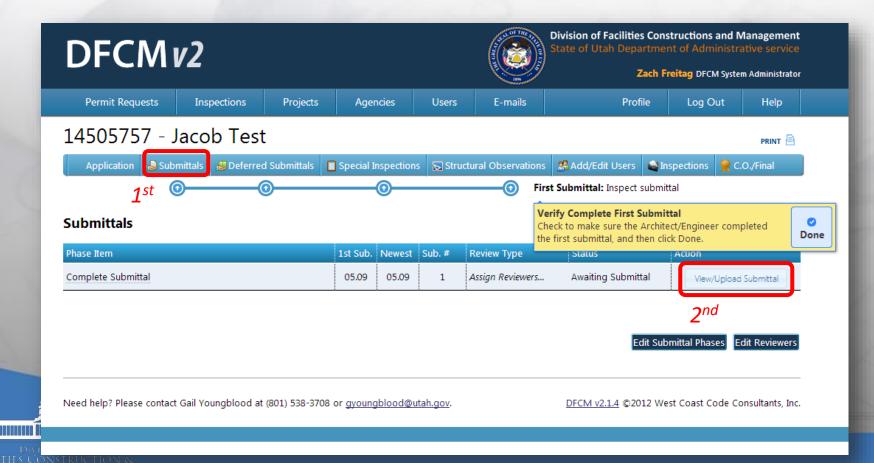


☐ The PM then logs into the EDMS and selects the project in question.





☐ To review the submittals click on the "Submittals" button at the top of the screen and then click on the "View/Upload Submittal" button under the "Action" tab.



- ☐ The PM should review each of the items uploaded by the Project Contact and verify that a complete submittal has been provided.
- Once it has been confirmed that all documents required by the Building Official have been uploaded click on the "Submittal Complete" button at the bottom of the screen. At this point an automatic email is sent to the Building Official (BO) informing them that reviewers can now be assigned to this project.



5. Assign Plan Reviewers

Application

#1 Application for Project

DFCM Project Manager Completes and submits New Application Form

#2 Application Reviewed

DFCM Administrator

Checks application and makes sure users are properly assigned

➤ First Submittal

#3 First Submittal

Architect/Engineer

Uploads the First Submittal, lists Deferred Items, completes the Special Inspection Form, and lists Structural Observations

#4 First Submittal Review

DFCM Project Manager

Ensures the First Submittal is correct, making changes if needed

#5 Plan Reviewers Assigned

DFCM Building Official

➤ Plan Review

#6 Plan Review

Reviewers

Plan Review begins: If the plans require corrections, comments are issued, otherwise approval letters are uploaded

#7 Resubmittal

Architect/Engineer

Should corrections be required, the Architect is notified and asked to upload a new submittal

#8 Permitted

DFCM Building Official

When a Submittal Phase or Deferred Item is Accepted, and a Final Set has been uplaoded, the Building Official uploads the Permitted Docs

Inspections & CO

#9a Inspections Start

DFCM Building Official Building Official assigns Inspectors

#9b Inspection Reports Uploaded

Code Inspectors

Code Inspectors upload daily and final inspection reports

#10 CO Issued

DFCM Building Official

Building Official issues a CO when all requirements have been met



Assign Plan Reviewers

- □ Please be aware that projects **will not move forward** for the Building Official to perform a review unless they have been first approved by the PM.
- After the PM has verified that all submittals have been uploaded an automated email will be sent to the Building Official notifying them that the project is ready to be reviewed.
- ☐ The Building Official logs into the EDMS and selects the appropriate project.



Assign Plan Reviewers

- Click on the "Add/Edit Users" tab at the upper left-hand portion of the screen and then add the appropriate reviewers from the dropdown menu at the bottom of the screen. An automated email will then be sent to each reviewer notifying them of their assignment.
 - → See next two pages for additional steps...

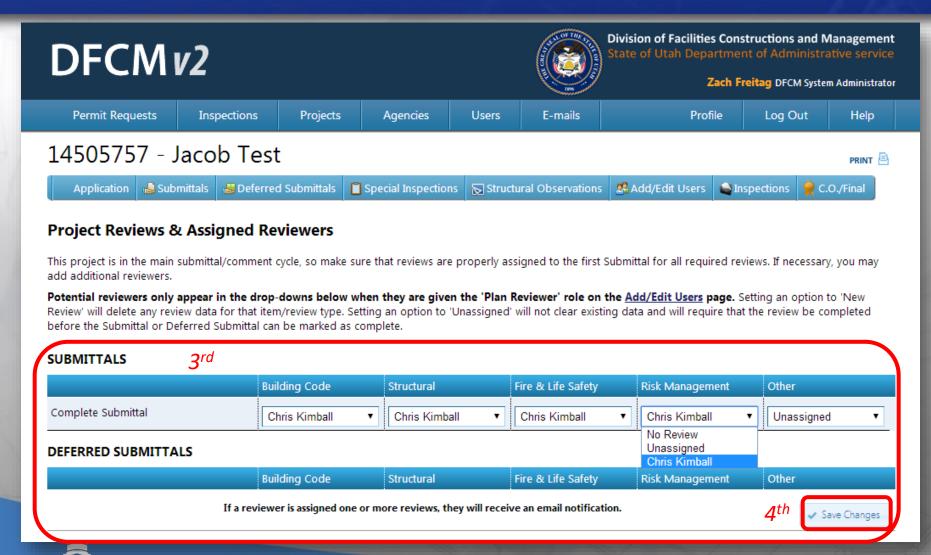


Assign Plan Reviewers





Assign Plan Reviewers





Application

#1 Application for Project

DFCM Project Manager Completes and submits New Application Form

#2 Application Reviewed

DFCM Administrator

Checks application and makes sure users are properly assigned ► First Submittal

#3 First Submittal

Architect/Engineer

Uploads the First Submittal, lists Deferred Items, completes the Special Inspection Form, and lists Structural Observations

#4 First Submittal Review

DFCM Project Manager

Ensures the First Submittal is correct, making changes if needed

#5 Plan Reviewers
Assigned
DFCM Building Official

Plan Review

6 Plan Review

Reviewers

Plan Review begins: If the plans require corrections, comments are issued, otherwise approval letters are uploaded

#7 Resubmittal

Architect/Engineer

Should corrections be required, the Architect is notified and asked to upload a new submittal

#8 Permitted

DFCM Building Official

When a Submittal Phase or Deferred Item is Accepted, and a Final Set has been uplaoded, the Building Official uploads the Permitted Docs Inspections & CO

#9a Inspections
Start

DFCM Building Official Building Official assigns Inspectors

#9b Inspection Reports Uploaded

Code Inspectors

Code Inspectors upload daily and final inspection reports

#10 CO Issued

DFCM Building Official

Building Official issues a CO when all requirements have been met



- After the Building Official has assigned the Reviewers for the project an automated email will be sent out notifying the Reviewers of their assignment.
- ☐ The Reviewers then log into the EDMS and click on the project in question.





□ All submittals can be found when clicking on the "Submittals" button at the top of the screen and then on the "View/Upload Submittal" button under the "Action" tab. Submittals can be reviewed using Adobe Acrobat, Bluebeam®, or other software.

The next page shows the submittals view screen.



DFCM v2



Division of Facilities Constructions and Management State of Utah Department of Administrative service

Zach Freitag DFCM System Administrator

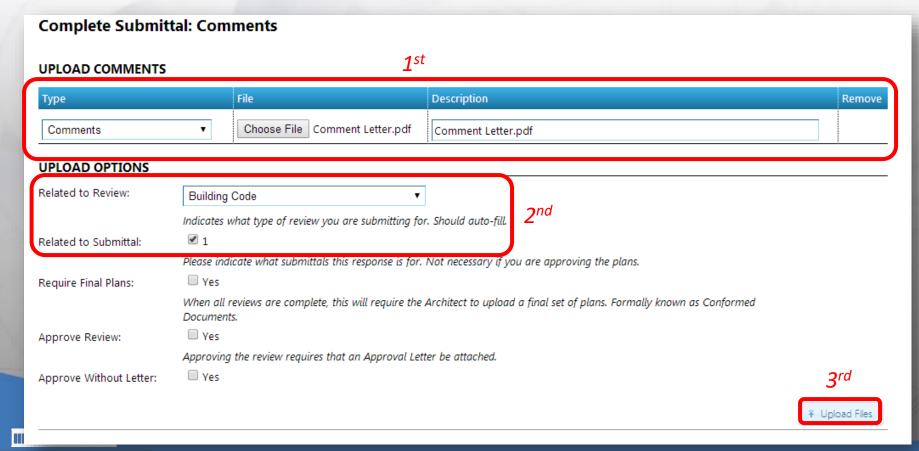
Permit Requests Profile Log Out Help Inspections **Projects** Agencies Users E-mails 14505757 - Jacob Test PRINT 🖹 Submittals Deferred Submittals Special Inspections Structural Observations Add/Edit Users Application C.O./Final Complete Submittal 1st REVIEWS + New Comment Q Modify Reviewers Ву Review Type Status History Not Assigned... Awaiting Submittal **SUBMITTALS** + New Submittal → Collapse Submittal # Files By Status Date Regarding Action Complete 05-09-14 Zach Freitag All Review Types 2nd Zip and Download All Uploads for Submittal #1 Transmittal Letter Transmittal Letter.pdf ± Open 3rd ± Open Plans Plans.pdf Structural Calculations Structural Calculations.pdf ± Open Geotechnical Reports Geotechnical Report.pdf ± Open Specifications Specifications.pdf ± Open **Energy Reports** Energy Compliance Reports.pdf ± Open

DIVI FACILITIES CO DFCM v2.1.4 ©2012 West Coast Code Consultants, Inc.

□ Plan review comments are then uploaded to the system by clicking on the "View/Upload Submittal" button under the "Action" tab and then on the "+ New Comment" button in the upper left-hand portion of the screen. Either MSWord or PDF documents can be uploaded to the system.



■ When uploading comments please note the review you have performed (i.e. Building Code, Structural, Fire, etc.) and the specific submittal number the comments are in relation to.



After clicking on the "Upload Files" button at the bottom of the page an automatic email will be sent to the DP notifying them that comments in relation to their submittal need to be addressed.



7. Revise and Resubmit

Application

#1 Application for Project

DFCM Project Manager Completes and submits New Application Form

#2 Application Reviewed

DFCM Administrator

Checks application and makes sure users are properly assigned First Submittal

#3 First Submittal

Architect/Engineer

Uploads the First Submittal, lists Deferred Items, completes the Special Inspection Form, and lists Structural Observations

#4 First Submittal Review

DFCM Project Manager

Ensures the First Submittal is correct, making changes if needed

#5 Plan Reviewers
Assigned
DFCM Building Official

➤ Plan Review

#6 Plan Review

Reviewers

Plan Review begins: If the plans require corrections, comments are issued, otherwise approval letters are uploaded

7 Resubmittal

Architect/Engineer

Should corrections be required, the Architect is notified and asked to upload a new submittal

#8 Permitted
DFCM Building Official

When a Submittal Phase or Deferred Item is Accepted, and a Final Set has been uplaoded, the Building Official uploads the Permitted Docs Inspections & CO

#9a Inspections
Start

DFCM Building Official Building Official assigns Inspectors

#9b Inspection Reports Uploaded

Code Inspectors

Code Inspectors upload daily and final inspection reports

#10 CO Issued

DFCM Building Official

Building Official issues a CO when all requirements have been met



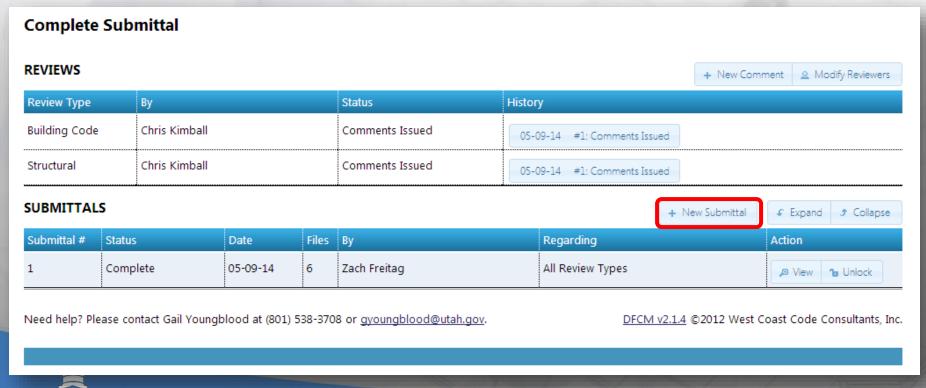
Revise and Resubmit

☐ Once comments from the Reviewers have been uploaded to the EDMS an automated email is sent out to the DP and copied to the PM notifying them of issues that need to be resolved.



Revise and Resubmit

☐ The Project Contact then logs into the EDMS and uploads written responses to the plan review comments as well as any necessary revisions, similar to Step #3. Please note that only revised sheets should be uploaded in subsequent submittals.





DFCM v2



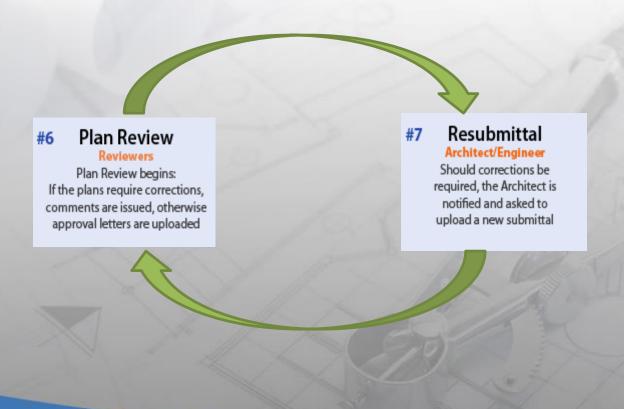
Division of Facilities Constructions and Management
State of Utah Department of Administrative service

Zach Freitag DFCM System Administrator

Permit Requests Inspections Projects Agencies Users E-mails Profile Log Out Help 14505757 - Jacob Test PRINT (=) Submittals Deferred Submittals Special Inspections Structural Observations Add/Edit Users Inspections Application C.O./Final Complete Submittal: Submittal #2 (New) 1st UPLOAD SUBMITTAL DOCUMENTS Add More Files Type File Description Remove Transmittal Letter Choose File Transmitta...etter.pdf Transmittal Letter.pdf Choose File Plans.pdf Plans × Plans.pdf UPLOAD OPTIONS ■ Building Code
■ Structural Related to Review(s): If left empty, all reviewers are notified. Otherwise, the checked reviewers will be notified when this submittal is complete. Complete Submittal: **7**nd Complete a submittal when you are sure that all files for this submittal have been provided Remember to mark the upload 'Complete Submittal' if it's complete. You can also mark it from the submittal summary page by clicking the 'View' button. **3**rd → Upload Files Need help? Please contact Gail Youngblood at (801) 538-3708 or gyoungblood@utah.gov. DFCM v2.1.4 ©2012 West Coast Code Consultants, Inc.

Revise and Resubmit

☐ Steps 6 & 7 are repeated until all plan review comments have been addressed.





8. Issue Permit

Application

#1 Application for Project

DFCM Project Manager Completes and submits New Application Form

#2 Application Reviewed

DFCM Administrator

Checks application and makes sure users are properly assigned

► First Submittal

#3 First Submittal

Architect/Engineer

Uploads the First Submittal, lists Deferred Items, completes the Special Inspection Form, and lists Structural Observations

#4 First Submittal Review

DFCM Project Manager

Ensures the First Submittal is correct, making changes if needed

#5 Plan Reviewers Assigned DFCM Building Official

➤ Plan Review

#6 Plan Review

Reviewers

Plan Review begins: If the plans require corrections, comments are issued, otherwise approval letters are uploaded

#7 Resubmittal

Architect/Engineer

Should corrections be required, the Architect is notified and asked to upload a new submittal

#8 Permitted DFCM Building Official

When a Submittal Phase or Deferred Item is Accepted, and a Final Set has been uplaoded, the Building Official uploads the Permitted Docs

Inspections & CO

#9a Inspections Start

DFCM Building Official Building Official assigns Inspectors

#9b Inspection Reports Uploaded

Code Inspectors

Code Inspectors upload daily and final inspection reports

#10 CO Issued

DFCM Building Official

Building Official issues a CO when all requirements have been met



Issue Permit

☐ If a "conformed" set of construction documents is required prior to issuing the building permit, Reviewers must note this prior to "Approving" their review. When uploading review comments or an acceptance letter the Reviewer simply checks the box noting that final conformed plans will be required.

UPLOAD COMMENTS Type File Description Remove Choose File No file chosen Comments UPLOAD OPTIONS Related to Review: **Building Code** • Indicates what type of review you are submitting for. Should auto-fill. 1 2 2 Related to Submittal: Please indicate what submittals this response is for. Not necessary if you are approving the plans. Yes Require Final Plans: When all reviews are complete, this will require the Architect to upload a final set of plans. Formally known as Conformed Documents. Approve Review: ☐ Yes Approving the review requires that an Approval Letter be attached. Yes Approve Without Letter: → Upload Files

Issue Permit

Once the BO receives notice that all reviews have been "Accepted" they will place the building permit stamp on the final construction documents and upload the "Approved" plans to the EDMS.

Complete Submittal

Review Type	Ву	Status	History
Building Code	Chris Kimball	Accepted Submittal	05-09-14 #2: Accepted v
Structural	Chris Kimball	Accepted Submittal	05-09-14 #2: Accepted ▼

SUBMITTALS

Submittal #	Status	Date	Files	By Regarding		Action
2	Complete	05-09-14	2	Zach Freitag	Structural, Building Code	
1	Complete	05-09-14	6	Zach Freitag	All Review Types	. № View 1 Unlock

Need help? Please contact Gail Youngblood at (801) 538-3708 or gyoungblood@utah.gov.

DFCM v2.1.4 ©2012 West Coast Code Consultants, Inc.



DFCM v2



Division of Facilities Constructions and Management
State of Utah Department of Administrative service

Zach Freitag DFCM System Administrator **Permit Requests** Inspections **Projects** Agencies Log Out Help E-mails **Profile** Users 14505757 - Jacob Test PRINT 🖹 Special Inspections Add/Edit Users C.O./Final Application Submittals ■ Deferred Submittals Structural Observations Inspections Complete Submittal: Permitted Documents 2nd UPLOAD Add More Files File Type Description Remove Plans Choose File Permitted Set.pdf Permitted Set.pdf UPLOAD OPTIONS 3rd Yes Complete Submittal: Complete the submittal when you are sure that all files for this submittal have been provided. 4th

Remember to mark the upload 'Complete Submittal' if it's complete.

Need help? Please contact Gail Youngblood at (801) 538-3708 or gyoungblood@utah.gov.

DFCM v2.1.4 ©2012 West Coast Code Consultants, Inc.

Upload Files



Issue Permit

An automated email is then sent to the DFCM PM and Project Contact notifying them that the "Approved" documents are posted on the EDMS. The PM should ensure that the Contractor has one full-size hard copy of all "Approved" submittals onsite at all times during construction.



Application

#1 Application for Project

DFCM Project Manager Completes and submits New Application Form

#2 Application Reviewed

DFCM Administrator

Checks application and makes sure users are properly assigned

► First Submittal

#3 First Submittal

Architect/Engineer

Uploads the First Submittal, lists Deferred Items, completes the Special Inspection Form, and lists Structural Observations

#4 First Submittal Review

DFCM Project Manager

Ensures the First Submittal is correct, making changes if needed

#5 Plan Reviewers Assigned DFCM Building Official

➤ Plan Review

#6 Plan Review

Reviewers

Plan Review begins: If the plans require corrections, comments are issued, otherwise approval letters are uploaded

#7 Resubmittal

Architect/Engineer

Should corrections be required, the Architect is notified and asked to upload a new submittal

#8 Permitted

DFCM Building Official

When a Submittal Phase or Deferred Item is Accepted, and a Final Set has been uplaoded, the Building Official uploads the Permitted Docs

Inspections & CO

#9a Inspections Start

DFCM Building Official Building Official assigns Inspectors

#9b Inspection Reports Uploaded

Code Inspectors

Code Inspectors upload daily and final inspection reports

#10 CO Issued

DFCM Building Official

Building Official issues a CO when all requirements have been met

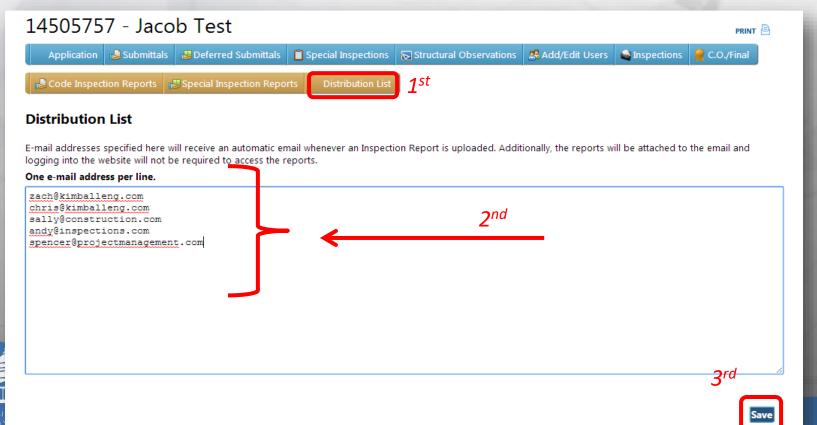


- ☐ The Code Inspector (IN) logs into the EDMS and clicks on the "Inspections" tab and then on the project in question.
- ☐ Sometime prior to commencing construction the DFCM AD will assign the IN to the project and grant them access to the project.

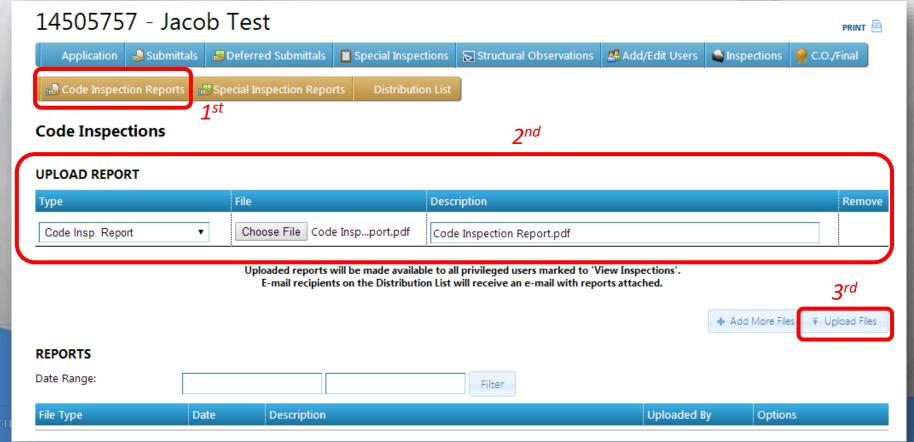




The first step is to click on the "Distribution List" tab and to input the emails of the persons that should receive code inspection and special inspection reports throughout the project (i.e. BO, PM, DP, Contractor, etc.).



☐ To upload a code inspection report click on the gold "Code Inspection Reports" tab and then select the particular file. The system will send out automatic emails to each member of the distribution list with a PDF of the report attached.

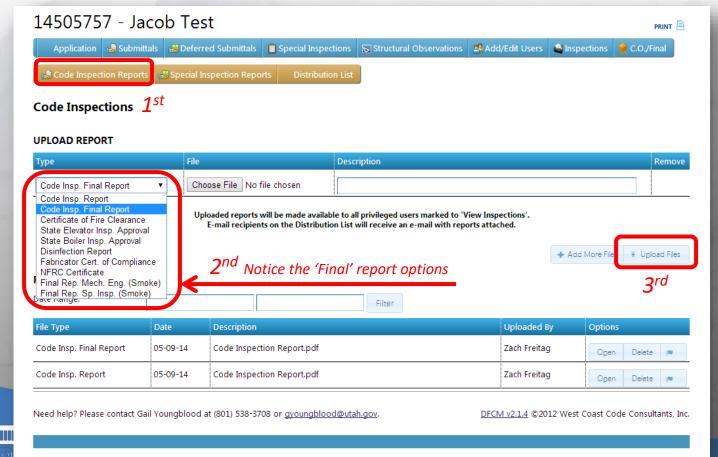


☐ Special inspection reports are uploaded similarly but by clicking on the gold "Special Inspection Reports" tab at the top of the screen.





☐ The IN will be required to upload other documents to the project that are required prior to issuing a "Final" or "C.O." One of these items is a "Final Code Inspection Report".



10. Issue Final or C.O.

Application

#1 Application for Project

DFCM Project Manager Completes and submits New Application Form

#2 Application Reviewed

DFCM Administrator

Checks application and makes sure users are properly assigned

► First Submittal

#3 First Submittal

Architect/Engineer

Uploads the First Submittal, lists Deferred Items, completes the Special Inspection Form, and lists Structural Observations

#4 First Submittal Review

DFCM Project Manager

Ensures the First Submittal is correct, making changes if needed

#5 Plan Reviewers Assigned DFCM Building Official

➤ Plan Review

#6 Plan Review

Reviewers

Plan Review begins: If the plans require corrections, comments are issued, otherwise approval letters are uploaded

#7 Resubmittal

Architect/Engineer

Should corrections be required, the Architect is notified and asked to upload a new submittal

#8 Permitted

DFCM Building Official

When a Submittal Phase or Deferred Item is Accepted, and a Final Set has been uplaoded, the Building Official uploads the Permitted Docs

Inspections & CO

#9a Inspections Start

DFCM Building Official Building Official assigns Inspectors

#9b Inspection Reports Uploaded

Code Inspectors

Code Inspectors upload daily and final inspection reports

#10 CO Issued

DFCM Building Official

Building Official issues a CO when all requirements have been met



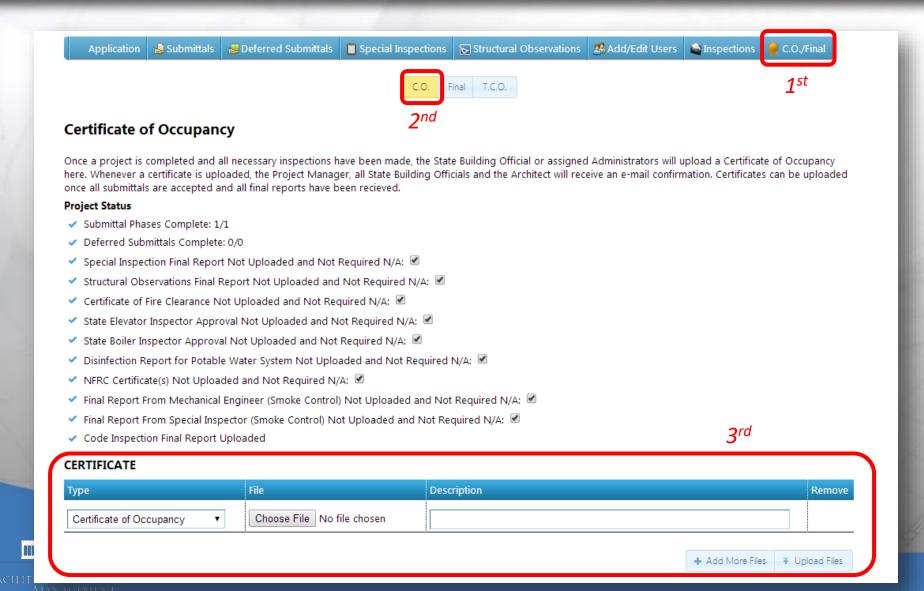
Issue Final or C.O.

- There are several items required prior to issuing a "Final" or "Certificate of Occupancy" for a project. These items may include a final code inspection report, final special inspection report, elevator certificate, etc. These reports are added as noted in the end Step 9.
- ☐ If all required items have not been provided a "Final" or "C.O." may not be issued. For issuance of a "T.C.O." the BO may override this requirement.

→ See the next page for the steps involved...



Issue Final or C.O.



Issue Final or C.O.

☐ Once everything is complete the Building Official uploads the signed "Certificate of Occupancy" form to the EDMS.





A. EDMS Process

Application

#1 Application for Project

DFCM Project Manager Completes and submits New Application Form

#2 Application Reviewed

DFCM Administrator Checks application and makes sure users are

properly assigned

First Submittal

#3 First Submittal

Architect/Engineer

Uploads the First Submittal, lists Deferred Items, completes the Special Inspection Form, and lists Structural Observations

#4 First Submittal Review

DFCM Project Manager

Ensures the First Submittal is correct, making changes if needed

#5 Plan Reviewers
Assigned
DFCM Building Official

Plan Review

#6 Plan Review

Reviewers

Plan Review begins: If the plans require corrections, comments are issued, otherwise approval letters are uploaded

#7 Resubmittal

Architect/Engineer

Should corrections be required, the Architect is notified and asked to upload a new submittal

#8 Permitted

DFCM Building Official

When a Submittal Phase or Deferred Item is Accepted, and a Final Set has been uplaoded, the Building Official uploads the Permitted Docs Inspections & CO

#9a Inspections Start

DFCM Building Official Building Official assigns Inspectors

#9b Inspection Reports Uploaded

Code Inspectors

Code Inspectors upload daily and final inspection reports

#10 CO Issued

DFCM Building Official

Building Official issues a CO when all requirements have been met



B. Help Menu

Help can be found within the system itself. The help menu contains the written instructions that are found in this guide.





C. Change Password

☐ Passwords can be changed from the "Profile" page after login. Type in the old password and the new password, then press "Update."

DFCM	v2				THE THE TYPE OF TH		ah Departme	structions and Notes of Administr	ative service
Permit Requests	Inspections	Projects	Agencies	Users	E-mails		Profile	Log Out	Help
Change Account You can update your basi		n below.		2 nd			1 st		PRINT 🖹
BASIC INFORMATION	N		СН	ANGE PASS	WORD				
E-mail	zach@kimbal	leng.com	This	s can be left bla	ank if you don't	want to chang	e it.		
First Name	Zach		Cur	rent Password					
Last Name	Freitag		Nev	w Password					
Phone Number	(801) 807-842	23	Rep	eat New Passv	vord				
Default Report Update 3 rd	My Projects	•							
Need help? Please contac	t Gail Youngblood at	: (801) 538-3708 (or gyoungblood@	outah.gov.		DFCM v2	2.1.4 ©2012 We	st Coast Code Co	onsultants, Inc.

D. See All Projects

The report menu can be used to see all the projects. Click "Report Menu" and then based on the login credentials different options will appear in the box below. Select "Admin" in the left-hand list and "All Projects" in the right-hand list. Now all the projects will be displayed.



E. Check Current Status

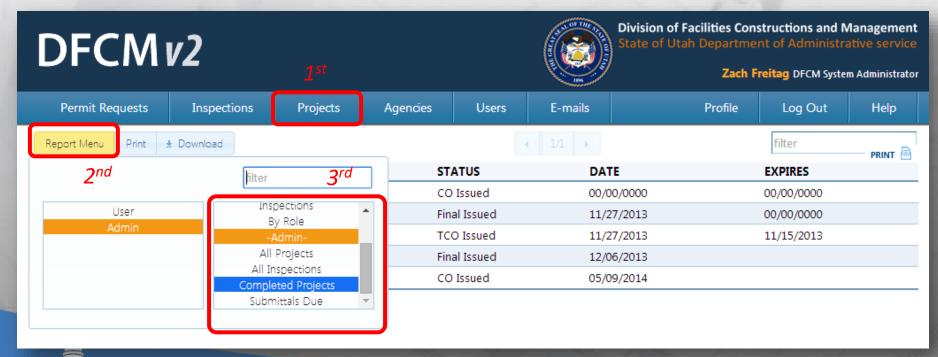
☐ The status can be found on the Projects main view page, it details what is happening with the project. The status changes automatically as the project progresses.

DFCM	v2		Division of Facilities Constructions and Management State of Utah Department of Administrative service Zach Freitag DFCM System Administrator				
Permit Requests	Inspections Projects	Agencies Us	ers E-mails	Profile Log Out	Help		
Report Menu Print	± Download		4 1/38 →	filter	PRINT 🖹		
PROJECT #	NAME	STATUS	REVIEWERS/INSPECTORS	PROJ. MANAGERS	DELETE		
<u>16515756</u>	deferred checkoff test	Under Review		Jacob Privalsky	<u>delete</u>		
14515759	New Notifications Test	Under Review	C. Kimball	Jacob Privalsky, Chris Kimb	all <u>delete</u>		
14505759	New Download Test	Final Issued	R. Cranston, B. Juszcak, A. Pavoni	Jacob Privalsky	<u>delete</u>		
14505758	Test 2	TCO Issued	A. Mahtinkah, C. Kimball	Jacob Privalsky, Alex Booth	<u>delete</u>		
14505757	Jacob Test	Final Issued	A. Mahtinkah	Jacob Privalsky	<u>delete</u>		
14505757	Jacob Test	CO Issued	C. Kimball	Zach Freitag	<u>delete</u>		
14505756	blablablabalb	Awaiting 1st		Jacob Privalsky	delete		
<u>14505755</u>	faefaef	Verifying 1st		Jacob Privalsky	<u>delete</u>		
13348310	DAS FLEET OPERATIONS REMODEL	Under Review	E. Calfa		delete		
13348310	DAS FLEET OPERATIONS REMODEL	Application Incomplete			<u>delete</u>		



F. Access/Create Reports

Reports can be created by using the "Report Menu" button on the Projects page. Click "Report Menu" and it will bring up a box. Select the type of report from the right-hand list and the Projects page will change to reflect the new report. The selected report can then be filtered, printed, or downloaded for additional sorting in Excel.





G. Archiving

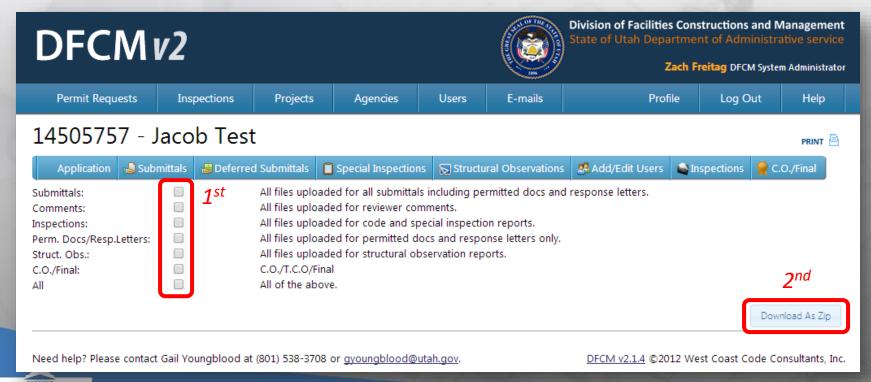
☐ The EDMS offers the ability to "Zip" the project files and download them all in one folder for archiving. From the individual project view click "Zip and Download (Custom)". Continued on next page





Archiving

The following screen will then appear. Check the boxes of files that you desire to retain for archiving purposes and click "Download as Zip." Depending on the internet browser you may have to click "Save". Check the Downloads folder on the computer to find the downloaded folder.





Archiving

After the appropriate files have been downloaded and archived, the DFCM AD may access the "Report" menu and delete all files associated with that project. This is done to retain space on the cloud server for future projects.

Report Menu	Print	± Download		4 1/1 →	highway	PRINT 🖹
PROJECT #		NAME	STATUS	REVIEWERS/INSPECTORS	PROJ. MANAGERS	DELETE
12216550		Highway Patrol Ballistic Window Replacement	Final Issued	F. Christensen		<u>delete</u>

