ELECTRONIC DOCUMENT MANAGEMENT SYSTEM

DFCM User's Guide

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DIVISION OF
FACILITIES CONSTRUCTION &
MANAGEMENT

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

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DFCM Administrator
Checks application and makes sure users are properly assigned

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#10 CO Issued
DFCM Building Official
Building Official issues a CO when all requirements have been met

Begin a New Project

❑ The DFCM Project Manager (PM) logs into the EDMS…

Begin a New Project

❑ 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.

Begin a New Project

❑ 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.

Begin a New Project

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

Begin a New Project

❑ 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).

2. Accept Application

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Accept Application

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

Accept Application

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

Accept Application

❑ 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).

DFCM v2

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Zach Freitag DFCM System Administrator

| Permit Requests | Inspections | Projects | Agencies | Users | E-mails | | Profile | Log Out | Help |

1st

Permits

PRINT

🏠 All | Application Pending | Application Complete   ◄ 1 ►   🔍 Find | + New Application | ⬇ Download

PROJECT #	NAME	STATUS	REVIEWERS/INSPECTORS
14505757*	Jacob Test	Application Complete	

2nd

* Indicates you are specifically involved with a project.

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Accept Application

❑ 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.

3. Upload Documents

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Upload Documents

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

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| Permit Requests | Inspections | Projects | Agencies | Users | E-mails | Profile | Log Out | Help |

Application Approved   PRINT

An email has been sent to the Architect listed for the project and they have been notified to upload the first submittal.

Upload Documents

❑ 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.

Upload Documents

❑ 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.

Upload Documents

❑ 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.

Upload Documents

❑ 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.

Upload Documents

❑ 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.

Upload Documents

❑ 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 | 2 Modify Reviewers |

Review Type	By	Status	History
	Not Assigned...	Awaiting Submittal	

SUBMITTALS

| + New Submittal | ↶ Expand | ↷ Collapse |

Submittal #	Status	Date	Files	By	Regarding	Action

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Upload Documents

❑ 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.*

Upload Documents

❑ 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.

Upload Documents

❑ 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.

Upload Documents

❑ 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".

1st - Check the boxes of any required Special Inspections

Upload Documents

❑ 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.

Upload Documents

❑ 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

4. Verify Complete Submittal

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Verify Complete Submittal

❑ 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

Verify Complete Submittal

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

Verify Complete Submittal

❑ 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.

Verify Complete Submittal

❑ 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.

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5. Assign Plan Reviewers

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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 drop-down 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

6. Perform Review

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Perform Review

❑ 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.

Perform Review

❑ 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.*

Perform Review

❑ 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.

Perform Review

❑ 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.

Perform Review

❑ 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

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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.

Complete Submittal

REVIEWS

+ New Comment	⌕ Modify Reviewers

Review Type	By	Status	History
Building Code	Chris Kimball	Comments Issued	05-09-14 #1: Comments Issued
Structural	Chris Kimball	Comments Issued	05-09-14 #1: Comments Issued

SUBMITTALS

+ New Submittal	⤵ Expand	⤴ Collapse

Submittal #	Status	Date	Files	By	Regarding	Action
1	Complete	05-09-14	6	Zach Freitag	All Review Types	⌕ View 🔓 Unlock

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Revise and Resubmit

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

#6 Plan Review
Reviewers
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8. Issue Permit

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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
Comments ▼	Choose File No file chosen		

UPLOAD OPTIONS

Related to Review: Building Code ▼
Indicates what type of review you are submitting for. Should auto-fill.

Related to Submittal: ☐ 1 ☑ 2
Please indicate what submittals this response is for. Not necessary if you are approving the plans.

Require Final Plans: ☑ Yes
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.

Approve Without Letter: ☐ Yes

⤒ 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	By	Status	History	
Building Code	Chris Kimball	Accepted Submittal	05-09-14 #2: Accepted	▼
Structural	Chris Kimball	Accepted Submittal	05-09-14 #2: Accepted	▼

SUBMITTALS

1st [+ Permitted Docs]   [⏎ Expand] [⏏ Collapse]

Submittal #	Status	Date	Files	By	Regarding	Action	
2	Complete	05-09-14	2	Zach Freitag	Structural, Building Code	🔍 View	🔓 Unlock
1	Complete	05-09-14	6	Zach Freitag	All Review Types	🔍 View	🔓 Unlock

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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.

9. Perform Inspections

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Perform Inspections

❑ 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.

Perform Inspections

❑ 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.).

Perform Inspections

❑ 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.

Perform Inspections

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

Perform Inspections

❑ 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.

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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

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#8 Permitted
DFCM Building Official
When a Submittal Phase or Deferred Item is Accepted, and a Final Set has been upladoed, 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

DIVISION OF
FACILITIES CONSTRUCTION &
MANAGEMENT

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."

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.

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		‹ 1/1 ›		highway
						PRINT
PROJECT #	**NAME**		**STATUS**	**REVIEWERS/INSPECTORS**	**PROJ. MANAGERS**	**DELETE**
12216550	Highway Patrol Ballistic Window Replacement		Final Issued	F. Christensen		delete