Electronic Document Management System

DFCM User's Guide

For questions, please reference the 'Help' tab on the EDMS home page.

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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1. Begin a new project *(PM)*
2. Accept application *(AD)*
3. Upload documents *(DP)*
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5. Assign plan reviewers *(BO)*
6. Perform review *(PR)*
7. Revise & resubmit *(DP)*
8. Issue permit *(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

1. Begin a New Project

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

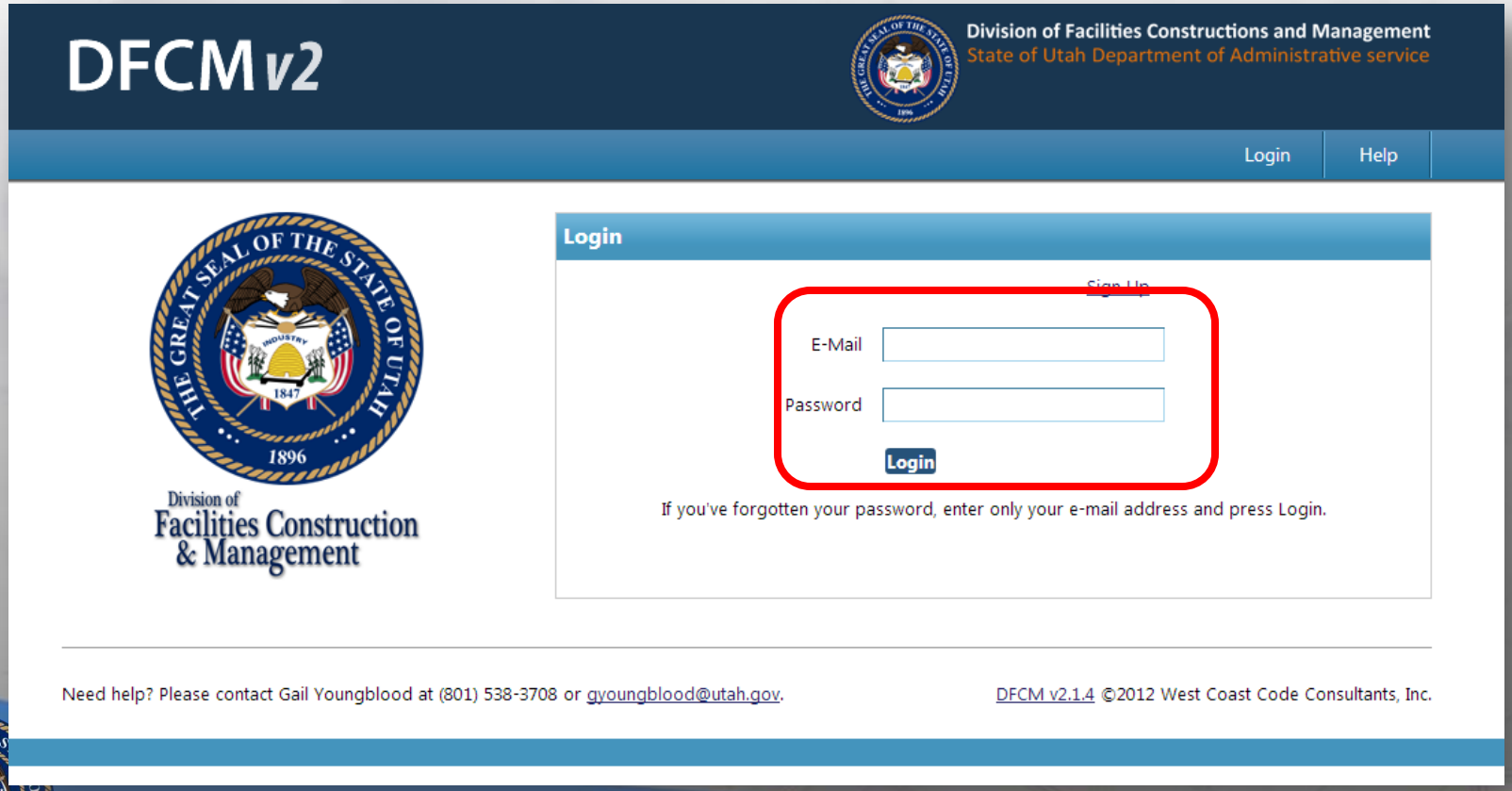
#9a Inspections Start
DFCM Building Official
Building Official assigns Inspectors

#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

Application for Project

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



Application for Project

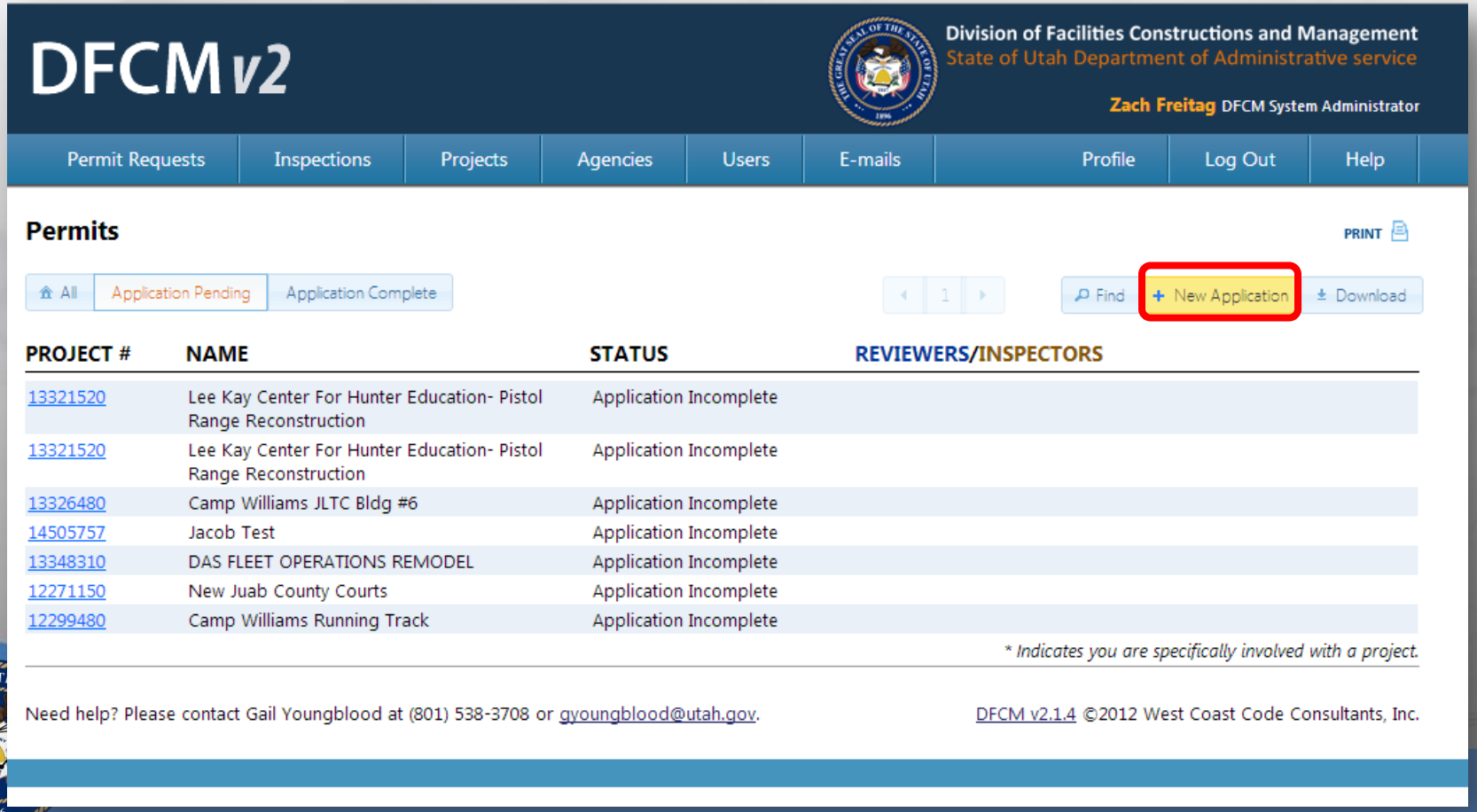
- The default screen displays all active projects currently assigned to that PM. Click on “Permit Requests” in the upper left tab to submit a new permit request.



PROJECT #	NAME	STATUS	REVIEWERS/INSPECTORS	PROJ. MANAGERS	DELETE
16515756	deferred checkoff test	Under Review		Jacob Privalsky	delete
14515759	New Notifications Test	Under Review	C. Kimball	Jacob Privalsky, Chris Kimball	delete
14505759	New Download Test	Final Issued	R. Cranston, B. Juszcak, A. Pavoni	Jacob Privalsky	delete
14505758	Test 2	TCO Issued	A. Mahtinkah, C. Kimball	Jacob Privalsky, Alex Booth	delete
14505757	Jacob Test	Final Issued	A. Mahtinkah	Jacob Privalsky	delete
14505757	Jacob Test	Application Incomplete			delete
14505756	blablablabalb	Awaiting 1st		Jacob Privalsky	delete
14505755	faefaef	Verifying 1st		Jacob Privalsky	delete
13348310	DAS FLEET OPERATIONS REMODEL	Under Review	E. Calfa		delete
13348310	DAS FLEET OPERATIONS REMODEL	Application Incomplete			delete

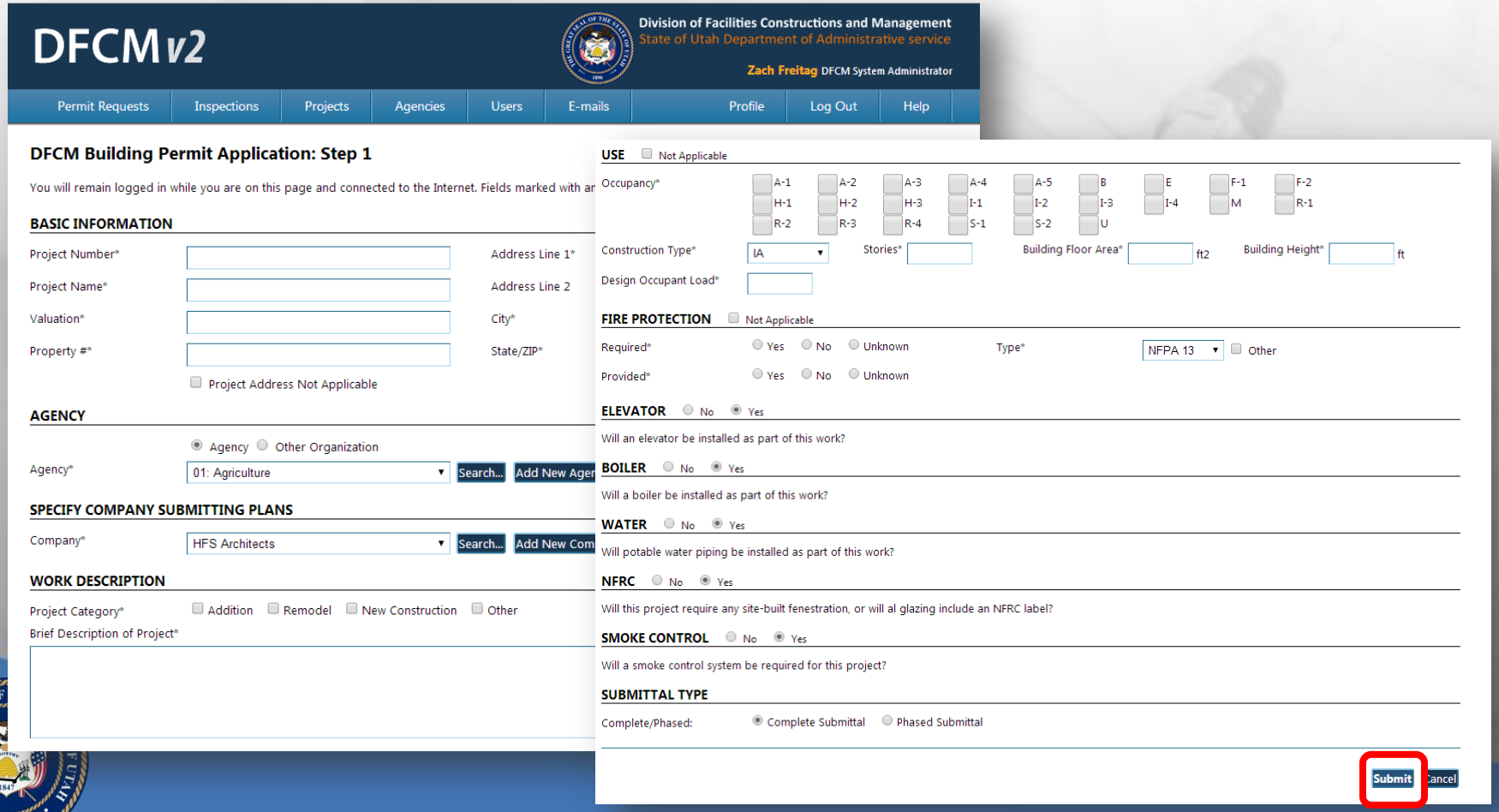
Application for Project

- 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.



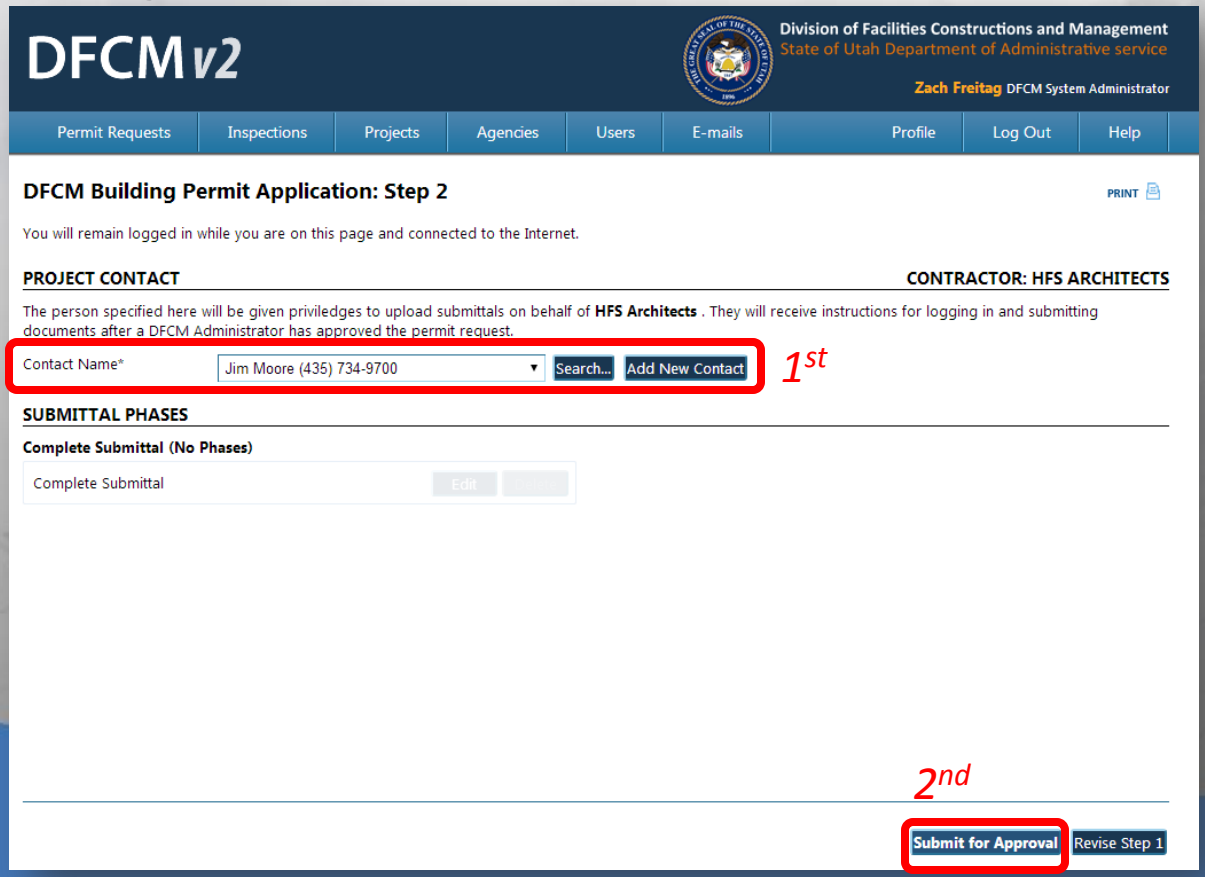
Application for Project

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



Application for Project

- After submitting the application the PM needs to list the Project Contact (typically the architect) for the project. Once completed an automatic email notification will be sent to the DFCM Administrator (i.e. Gail Youngblood).



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2. Accept Application

Application

#1 Application for Project
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Completes and submits New Application Form

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DFCM Administrator
Checks application and makes sure users are properly assigned

First Submittal

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Architect/Engineer
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DFCM Project Manager
Ensures the First Submittal is correct, making changes if needed

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DFCM Building Official

Plan Review

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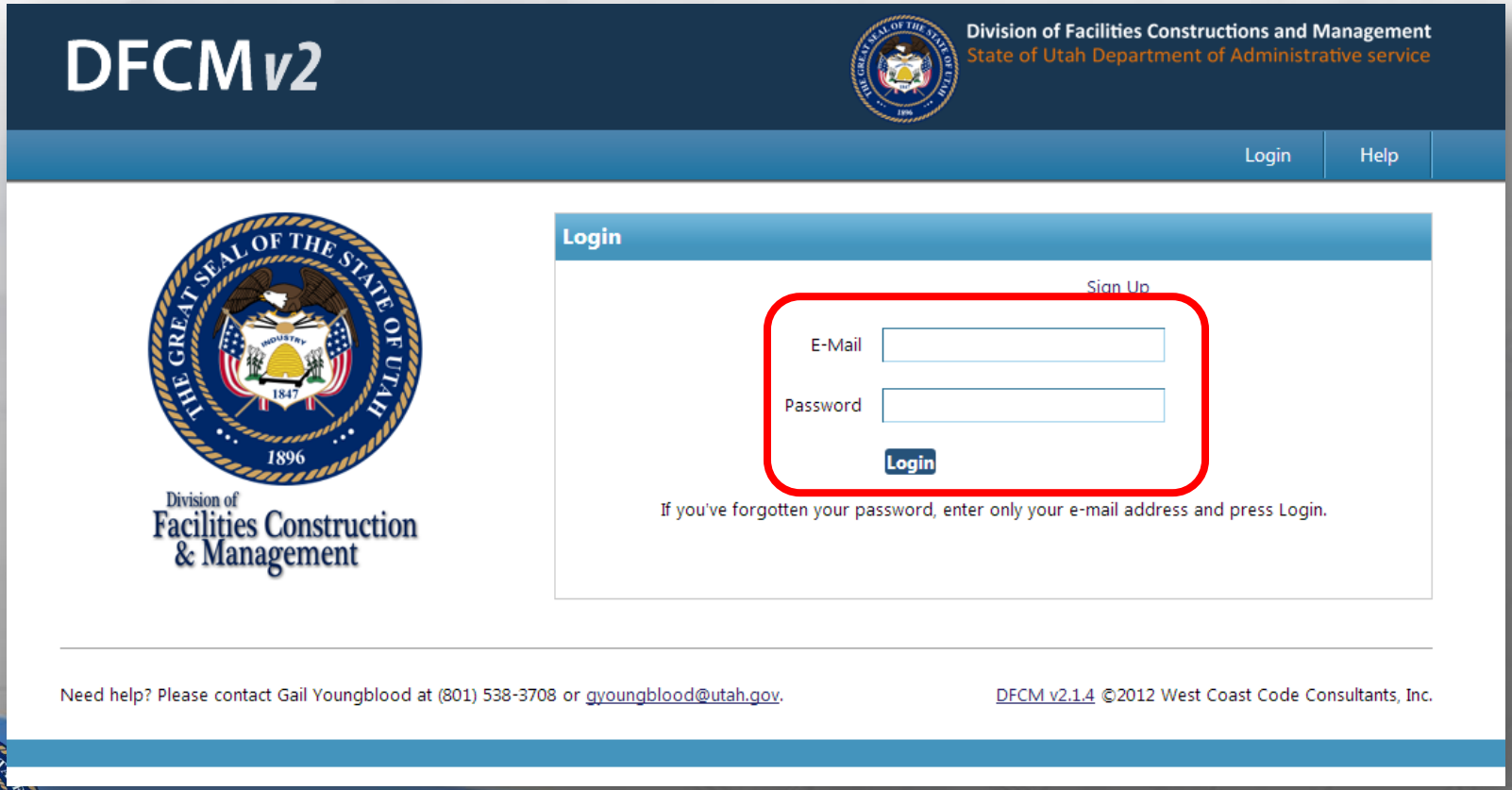
Application Reviewed

- The DFCM Administrator will receive an automated email once the permit request has been completed notifying them to review the request.



Application Reviewed

- The DFCM Administrator should follow the login steps as said above to log into the EDMS and access the permit request screen.



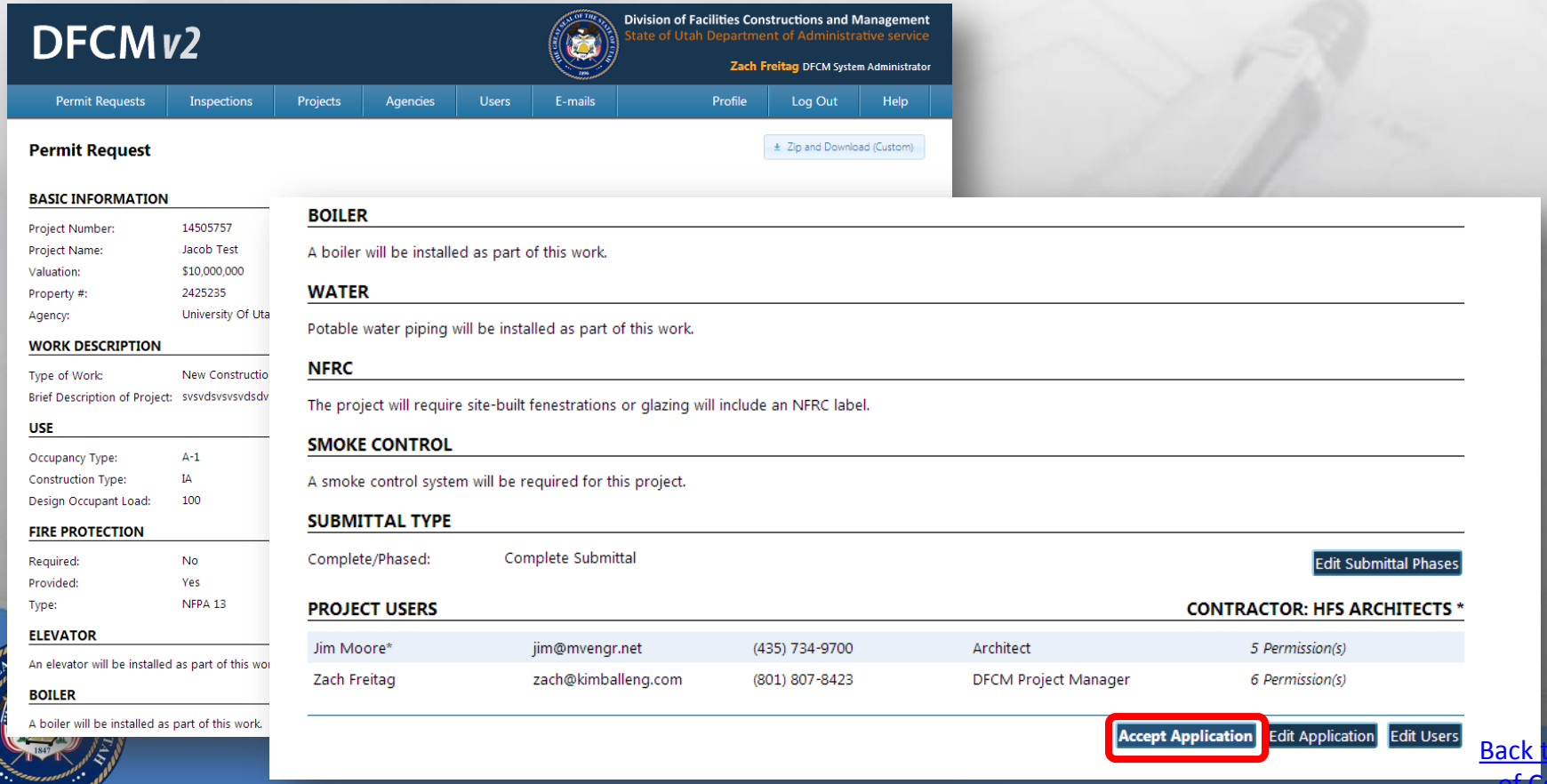
Application Reviewed

- Click on the project number for the permit request in question and review the permit application for completeness.



Application Reviewed

- If complete click on the "Accept Permit Request" button at the bottom of the screen. An automatic email will then. be sent out to the Project Contact notifying them that they can now upload the construction documents to the system.



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3. Upload Documents

Application

#1 Application for Project
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Inspections & CO

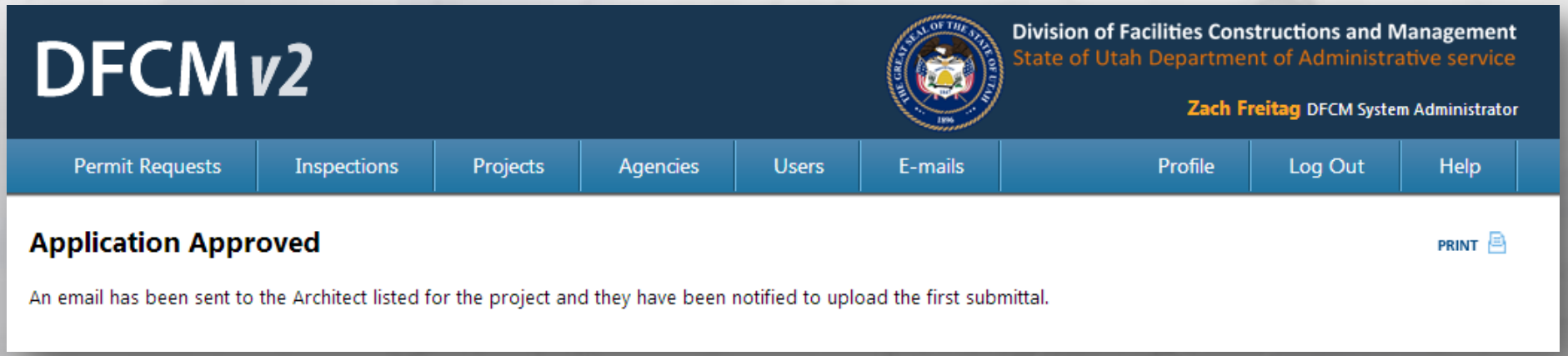
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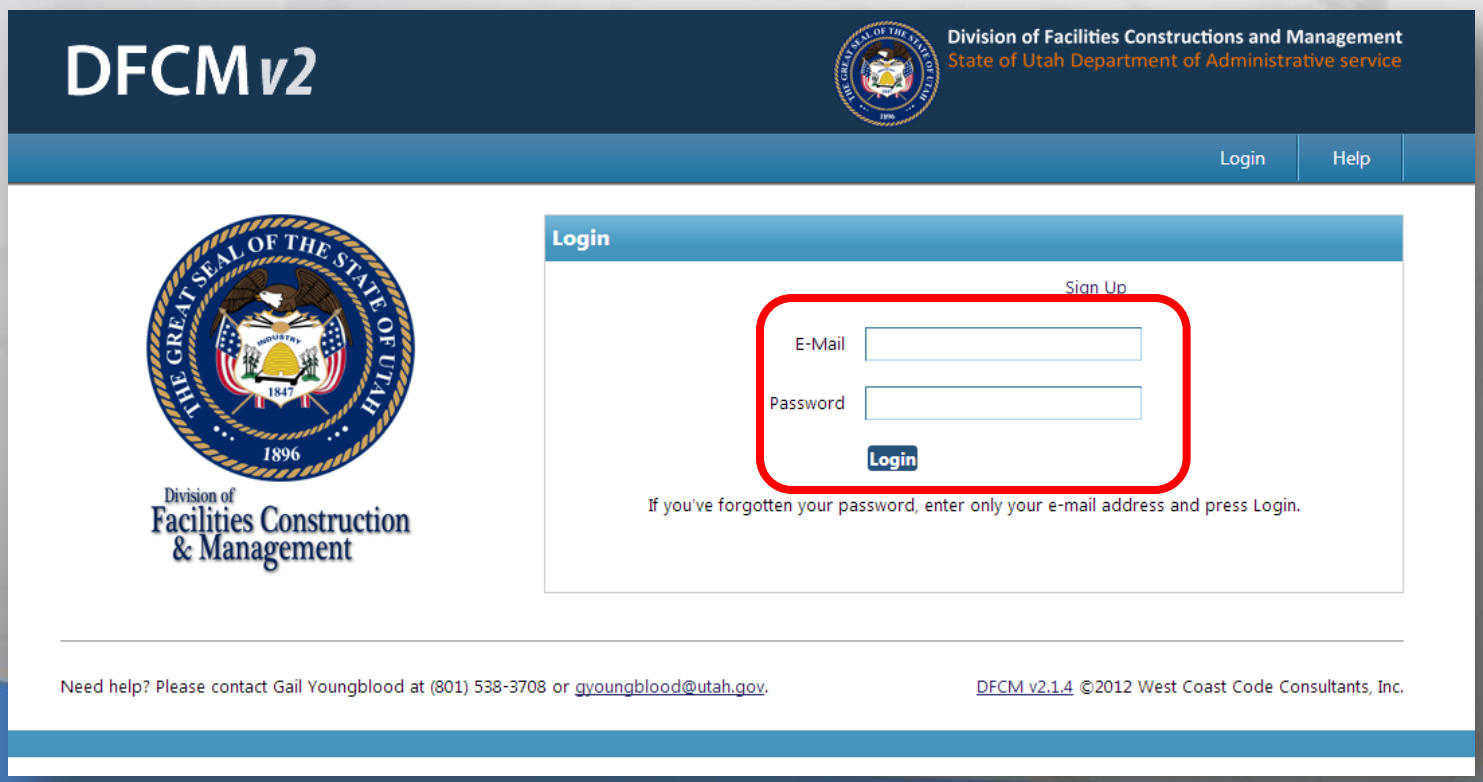
First Submittal

- The Project Contact and PM will receive an automated email once the permit request has been accepted by the DFCM Administrator.



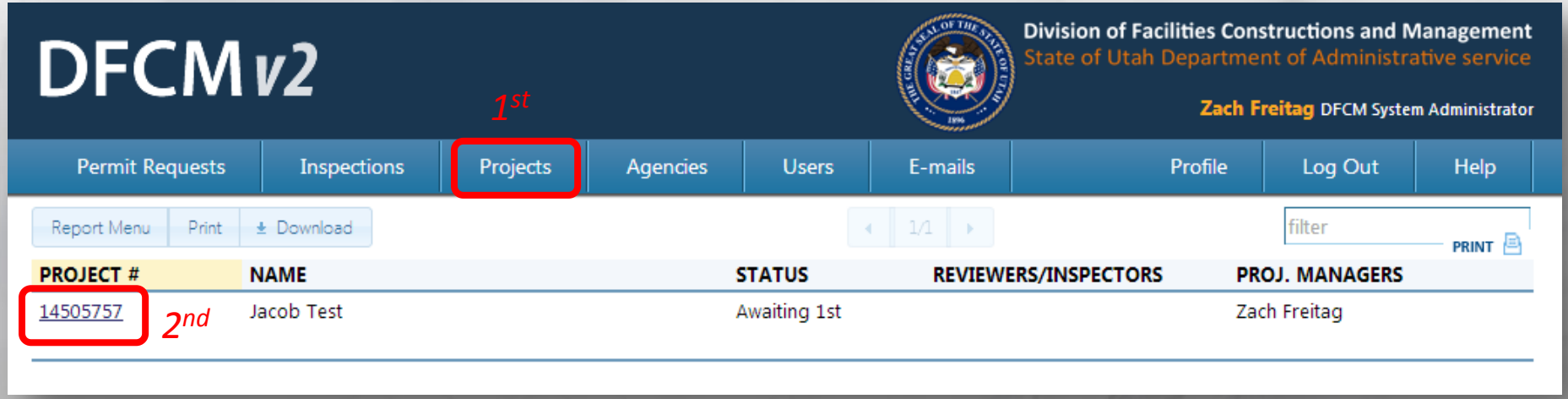
First Submittal

- The Project Contact should now log into the EDMS and type in their email address and temporary password they received from the system. A permanent password will be provided after logging in the first time.



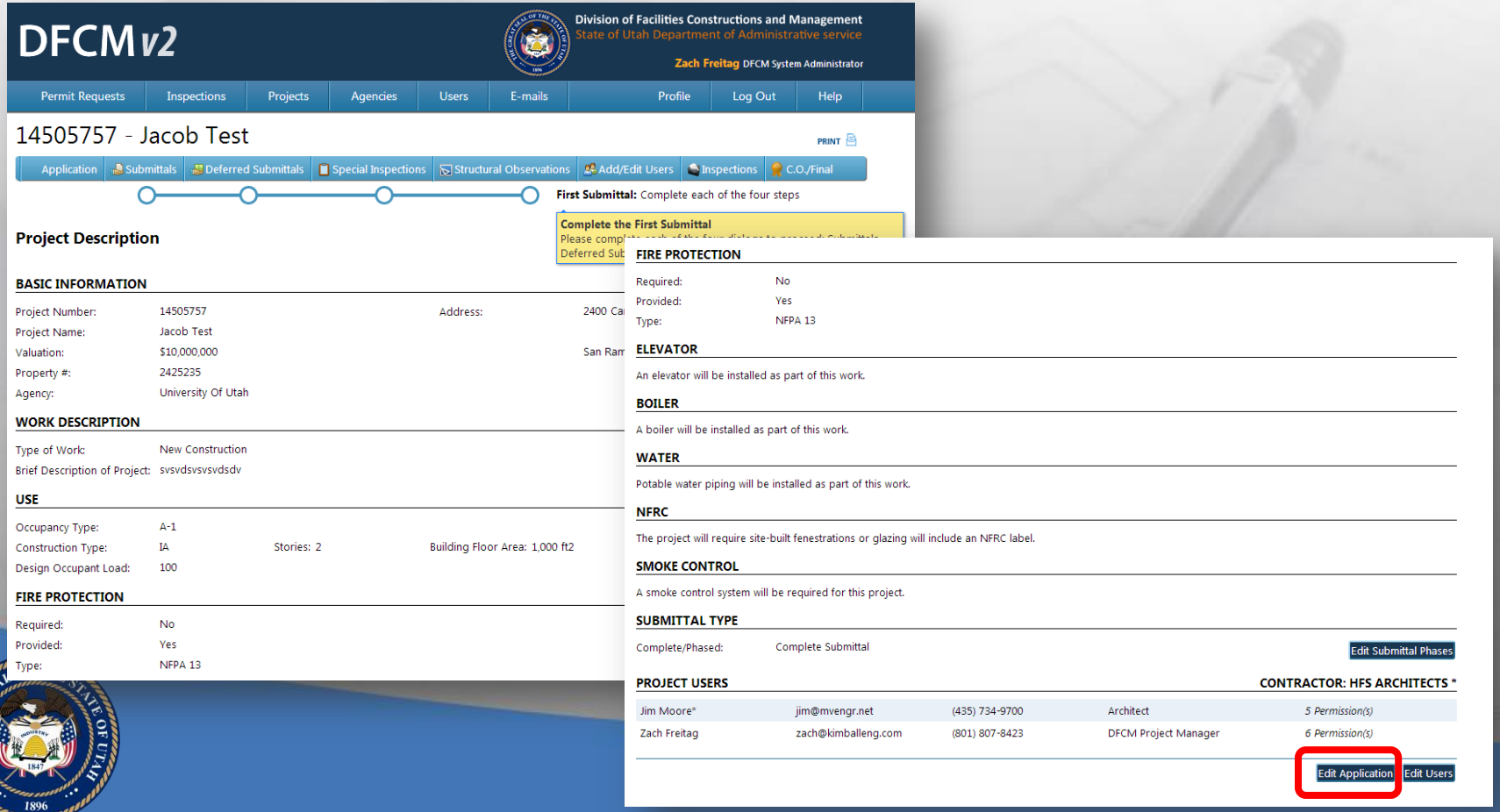
First Submittal

- Once logged into the system you will see a list of projects assigned to you. Click on the DFCM number for the project in question.



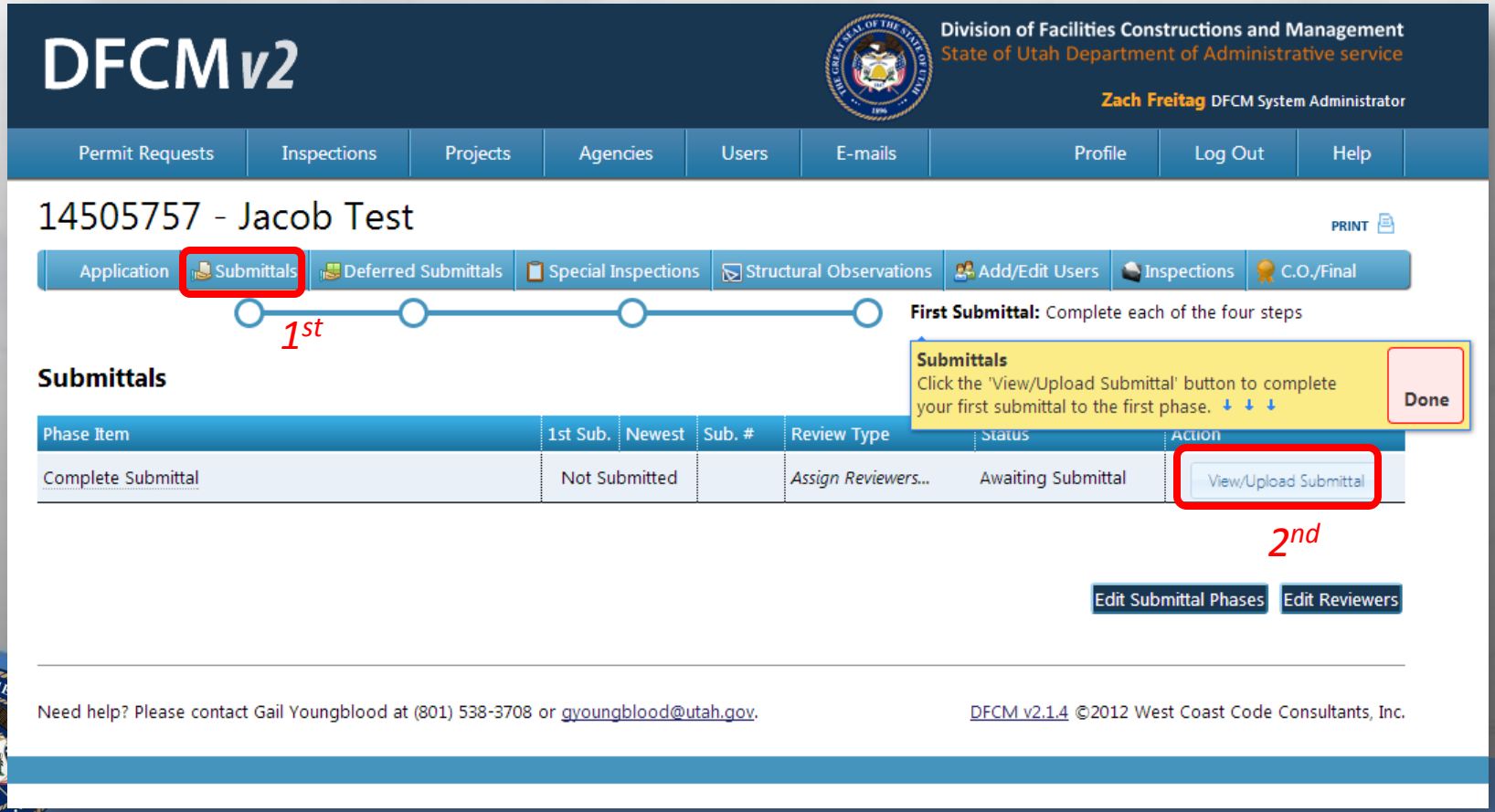
First Submittal

- 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.



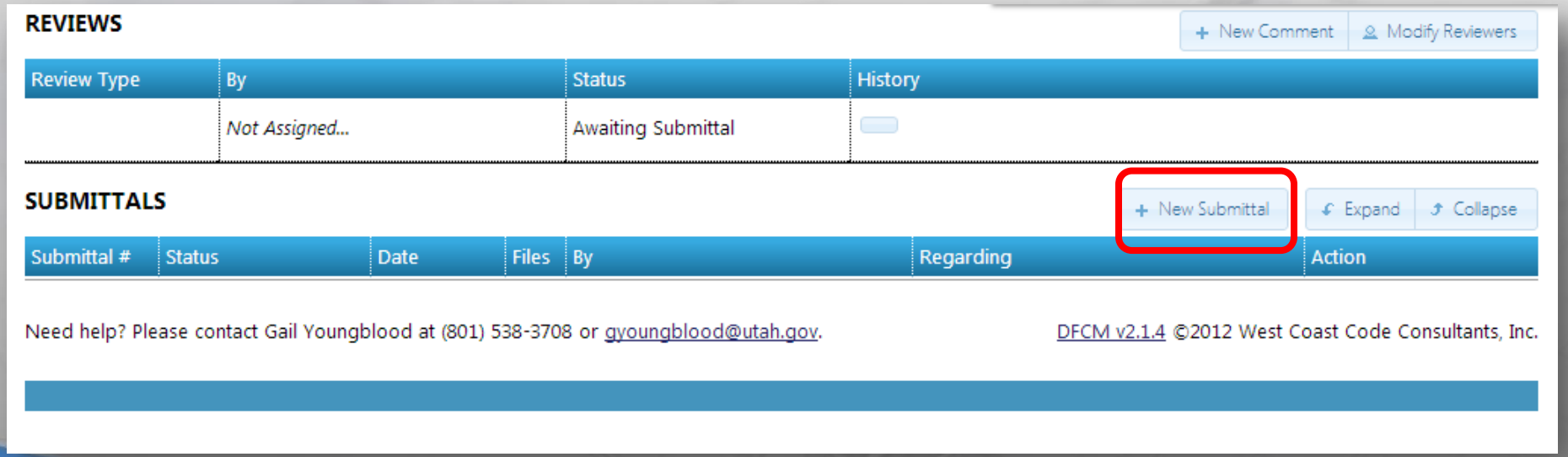
First Submittal

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



First Submittal

- 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.



First Submittal

- 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.

  - *The next page shows the submittals screen and the page after that shows the submittal confirmation screen.*

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
Add and select files for upload. Check 'Complete Submittal' to indicate no more files will be added, and then click 'Upload Files'.

Complete Submittal: Submittal #1 (New)

UPLOAD SUBMITTAL DOCUMENTS

1st

Add More Files

Type	File	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	✖
Geotechnical Reports	Choose File Geotechni...port.pdf	Geotechnical Report.pdf	✖
Specifications	Choose File Specifications.pdf	Specifications.pdf	✖
Energy Reports	Choose File Energy Co...orts.pdf	Energy Compliance Reports.pdf	✖

UPLOAD OPTIONS

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: ☑ Yes

2nd

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

Success

PRINT

Your upload and/or setting submission was successful. Click here to continue.

The following items were uploaded:

Transmittal-Letter.pdf
Plans.pdf
Structural-Calculations.pdf
Geotechnical-Report.pdf
Specifications.pdf
Energy-Compliance-Reports.pdf

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First Submittal

- After the submittals have been uploaded the system will automatically take the Project Contact 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 next page shows the Deferred Submittals screen. Note the blue progress-bar showing the first step (submittals) is complete.*


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PRINT
Application
Submittals
Deferred Submittals
Special Inspections
Structural Observations
Add/Edit Users
Inspections
C.O./Final
First Submittal: Complete each of the four steps
Deferred Submittals
List all Deferred Submittals, if applicable, then click Done.
2nd
Done
Deferred Submittals
There are no submittals to show.
1st
Deferred Submittal Items
due date
Add Item
Note: the progress bar shows the submittals step is complete.
Need help? Please contact Gail Youngblood at (801) 538-3708 or gyoungblood@utah.gov.
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First Submittal

- After the deferred submittals have been noted the system will automatically take the Project Contact to the "Special Inspections" screen. At this point all special inspections and structural tests required for the project should be noted. If special inspections/testing do not apply to this project the "Not Applicable" button should be selected.

  - *The next page shows the Special Inspections screen. Notice the blue progress-bar has updated to show the current step.*

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State of Utah Department of Administrative service

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Permit Requests | Inspections | Projects | Agencies | Users | E-mails | Profile | 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

Special Inspections
Complete this form, if applicable, and then click Done.

Done

Special Inspections

This form is saved automatically every time a change is made.

Anyone with the permissions to modify the Special Inspections may do so until a phase item has been marked as Permitted. After that, only Administrators may change this form.

2nd

SPECIAL INSPECTION AND TESTING ITEMS
REQUIRED BY CHAPTER 17 OF THE 2009 IBC

Indicate items requiring special inspection or structural testing by checking the appropriate box. All items not requiring inspection/testing should be removed from the form. This page simply lists the items that will require special inspections. All permitted construction documents must have a completed DFCM "Special Inspection, Material Testing & Structural Observation" form. This form can be obtained at the following web site: http://dfcm.utah.gov/dfcm/building-official.html.

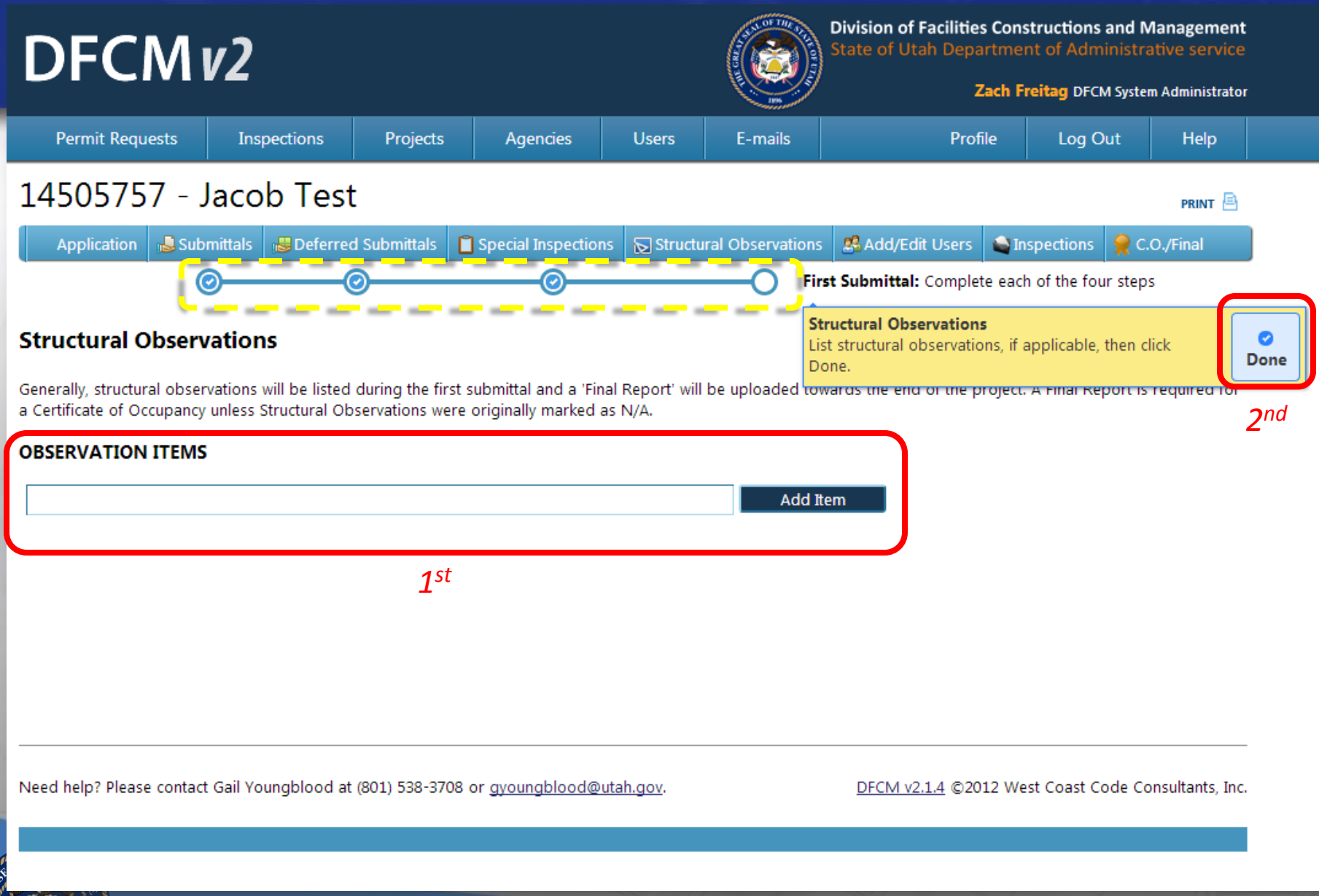
- [ ] FABRICATORS
- [ ] WELDING
- [ ] DETAILS OF STEEL FRAME
- [ ] HIGH-STRENGTH BOLTING
- [ ] STRUCTURAL STEEL
- [ ] CONCRETE CONSTRUCTION
- [ ] MASONRY CONSTRUCTION
- [ ] WOOD CONSTRUCTION
- [ ] SOILS CONSTRUCTION
- [ ] DRIVEN DEEP FOUNDATIONS
- [ ] CAST-IN-PLACE DEEP FOUNDATIONS

1st Check the boxes of any required Special Inspections

First Submittal

- After the special inspections/tests have been uploaded the system will automatically take the Project Contact 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.

  - *The next page shows the Structural Observations screen. Notice again the progress-bar.*


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Application
Submittals
Deferred Submittals
Special Inspections
Structural Observations
Add/Edit Users
Inspections
C.O./Final
First Submittal: Complete each of the four steps
Structural Observations
List structural observations, if applicable, then click Done.
Done
2nd
Structural Observations
Generally, structural observations will be listed during the first submittal and a 'Final Report' will be uploaded towards the end of the project. A Final Report is required for a Certificate of Occupancy unless Structural Observations were originally marked as N/A.
OBSERVATION ITEMS
Add Item
1st
Need help? Please contact Gail Youngblood at (801) 538-3708 or gyoungblood@utah.gov.
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First Submittal

- Once each of these four steps have been completed (1. Uploading submittal; 2. Listing deferred submittals; 3. Listing special inspections; and 4. Listing 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.

  - *The next page shows the submittal confirmation screen.*

14505757 - Jacob Test

PRINT

Application | Submittals | Deferred Submittals | Special Inspections | Structural Observations | Add/Edit Users | Inspections | C.O./Final

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

Application

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DFCM Administrator
Checks application and makes sure users are properly assigned

First Submittal

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Inspections & CO

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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

First Submittal Review

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

First Submittal Review

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



First Submittal Review

- 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.



First Submittal Review

- 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 informing them that reviewers can now be assigned to this project.

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5. Assign Plan Reviewers

Application

#1 Application for Project
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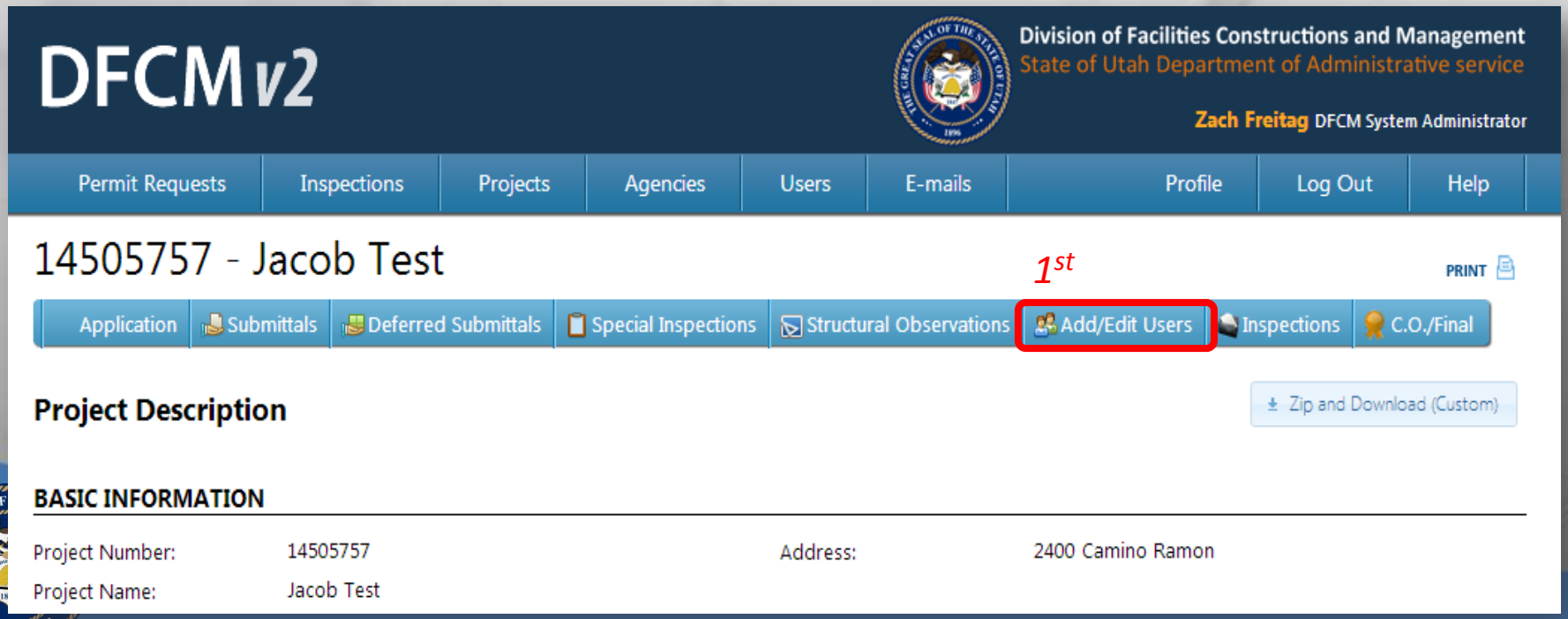
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DFCM Building Official
Building Official issues a CO when all requirements have been met

Assign Plan Reviewers

- 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. At this point an automated email will be sent to each reviewer notifying them of their assignment.
  - *The next two pages show the process*



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Modify Project Users

Users marked red do not have activated accounts. In many cases they will be automatically activated, like when the permit is approved. You can also manually activate them by editing the user directly.

EXISTING USERS — **CONTRACTOR: HFS ARCHITECTS ***

Jim Moore*		jim@mvengr.net	(435) 734-9700	Architect	*5 Permission(s)*
Zach Freitag	*2nd*	zach@kimballeng.com	(801) 807-8423	DFCM Project Manager	*6 Permission(s)*

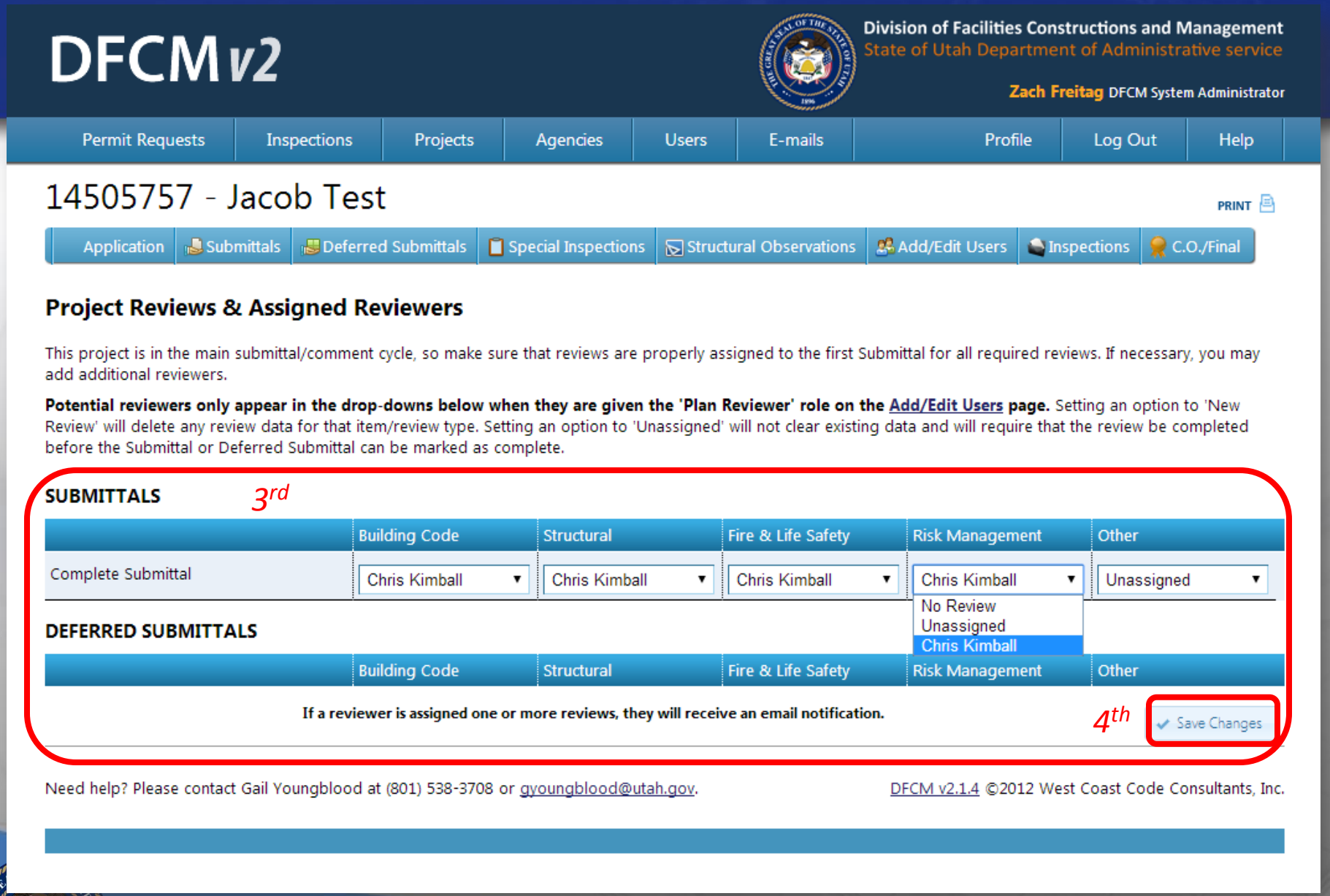
ADD USER TO PROJECT

Chris Kimball <chris@kimballeng.com> | Plan Reviewer ▾ | Add To Project | Create New Contact

View Application | Edit Application

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6. Perform Review

Application

#1 Application for Project
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#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

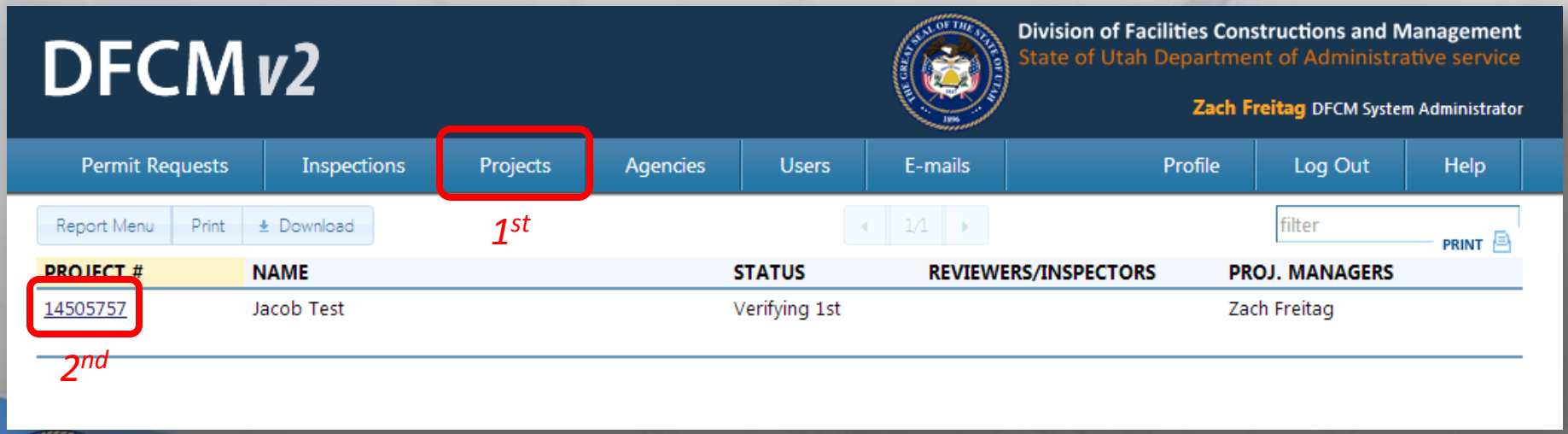
#9a Inspections Start
DFCM Building Official
Building Official assigns Inspectors

#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

Plan 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.



Plan 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.*

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

Application | Submittals | Deferred Submittals | Special Inspections | Structural Observations | Add/Edit Users | Inspections | C.O./Final

Complete Submittal 1st

REVIEWS

+ New Comment | Modify Reviewers

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

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

Uploads for Submittal #1 — Zip and Download All

2nd

Transmittal Letter	Transmittal Letter.pdf	Open
Plans	Plans.pdf	Open
Structural Calculations	Structural Calculations.pdf	Open
Geotechnical Reports	Geotechnical Report.pdf	Open
Specifications	Specifications.pdf	Open
Energy Reports	Energy Compliance Reports.pdf	Open

3rd

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

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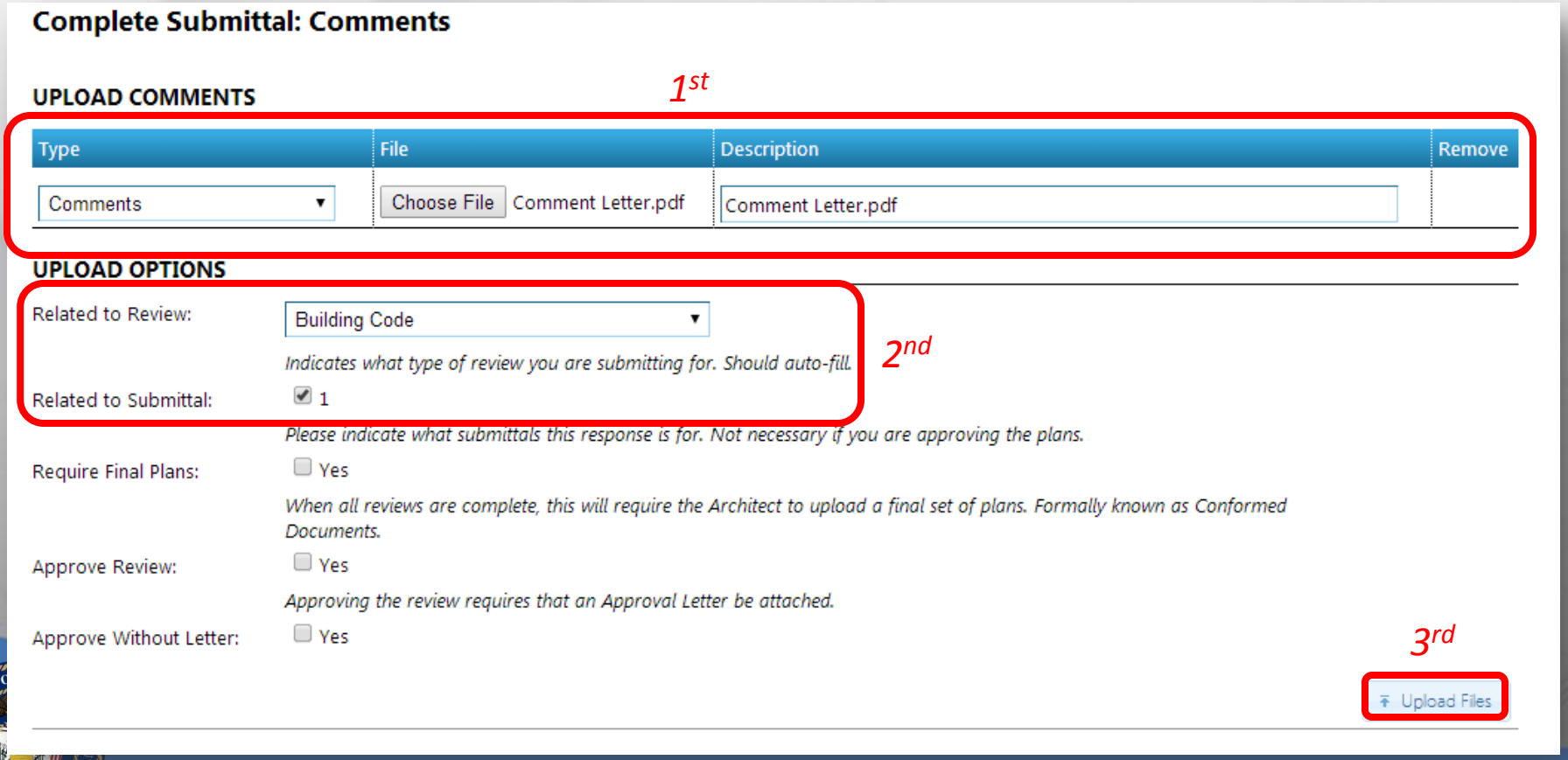
Plan Review

- 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.



Plan 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.



Plan Review

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



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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

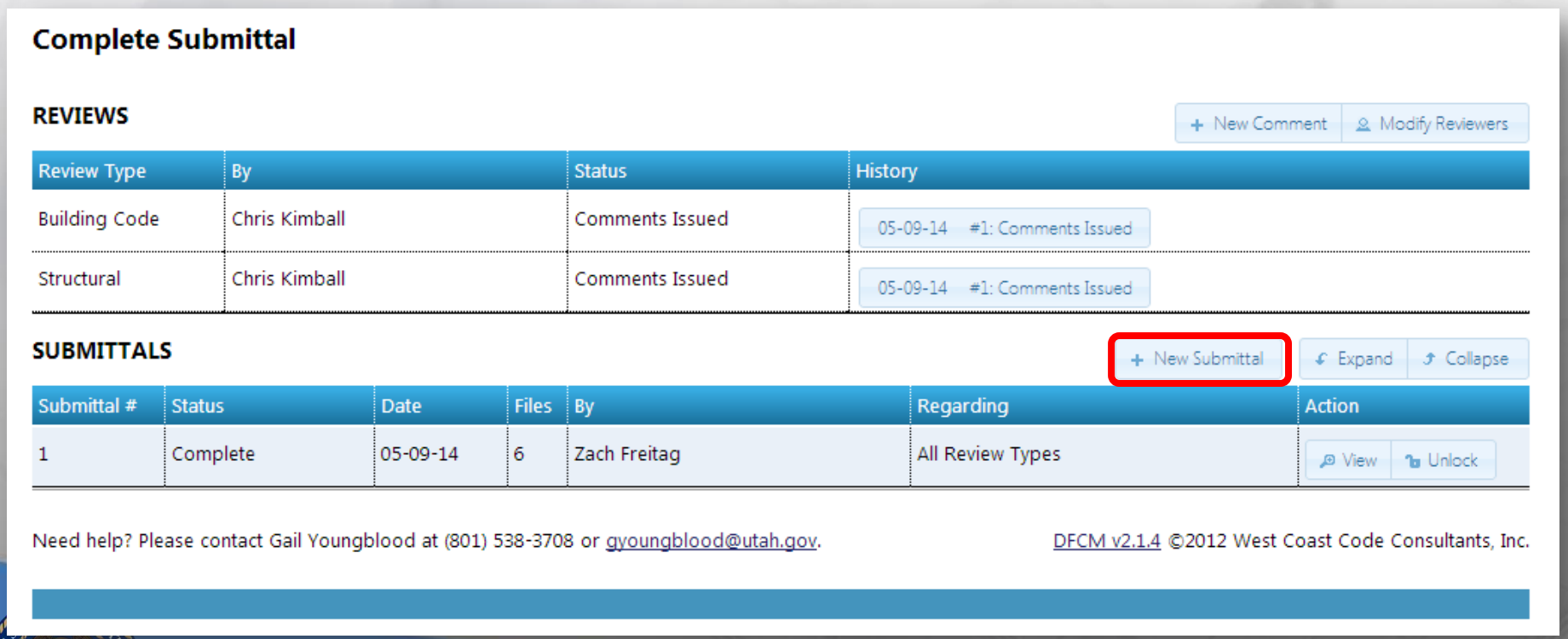
#10 CO Issued
DFCM Building Official
Building Official issues a CO when all requirements have been met

Resubmittal

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

Resubmittal

- 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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Zach Freitag DFCM System Administrator

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

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PRINT

Application | Submittals | Deferred Submittals | Special Inspections | Structural Observations | Add/Edit Users | Inspections | C.O./Final

Complete Submittal: Submittal #2 (New)

UPLOAD SUBMITTAL DOCUMENTS *1st*

+ Add More Files

Type	File	Description	Remove
Transmittal Letter	Choose File Transmitta...etter.pdf	Transmittal Letter.pdf	
Plans	Choose File Plans.pdf	Plans.pdf	✖

UPLOAD OPTIONS

Related to Review(s): ☑ Building Code ☑ Structural

If left empty, all reviewers are notified. Otherwise, the checked reviewers will be notified when this submittal is complete.

Complete Submittal: ☑ Yes *2nd*

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.

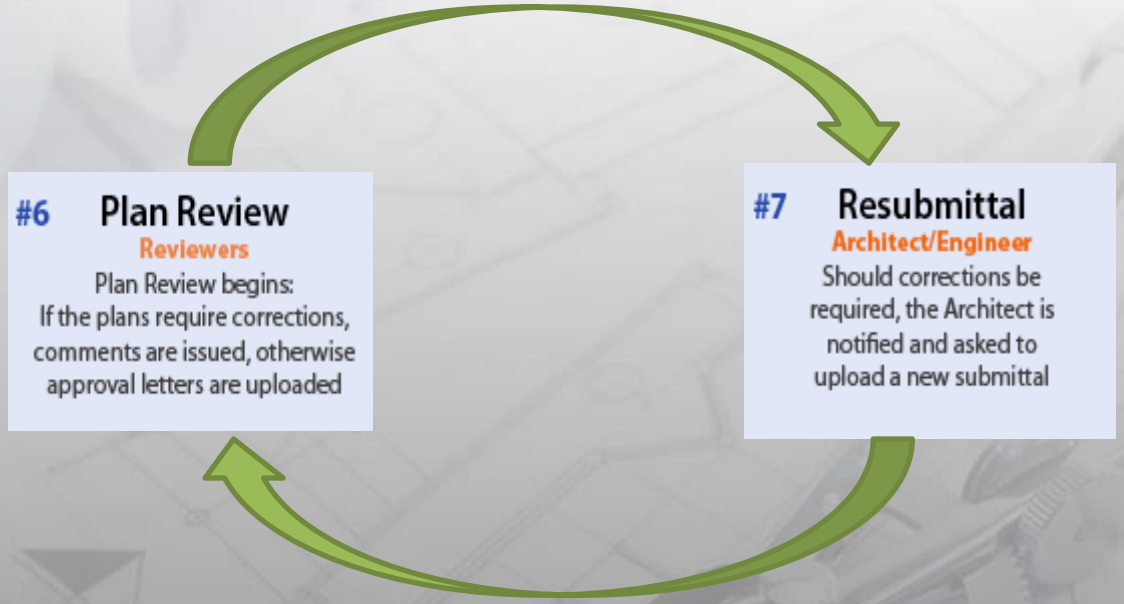
3rd Upload Files

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Resubmittal

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



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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

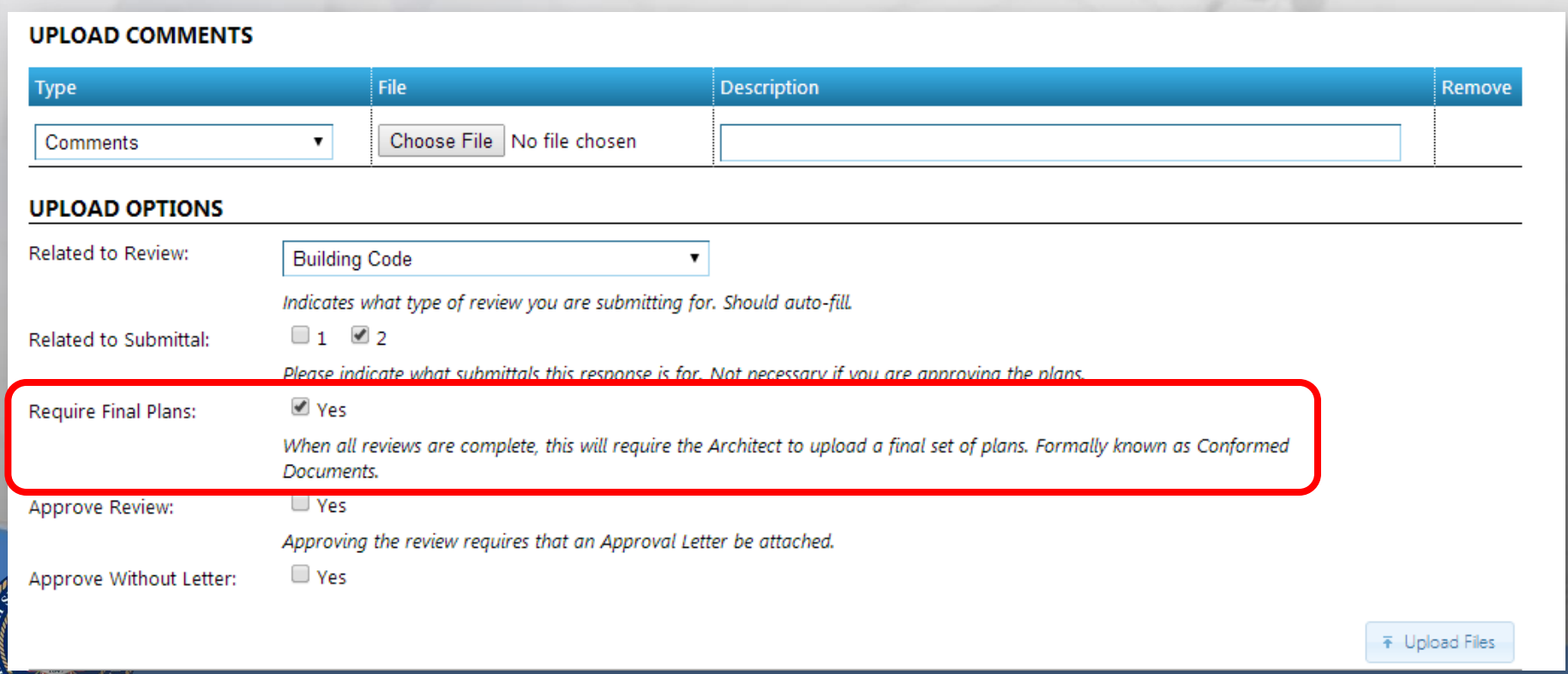
#9a Inspections Start
DFCM Building Official
Building Official assigns Inspectors

#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

Permitted

- If a "conformed" set of construction documents needs to be provided prior to issuing the building permit Reviewers must note this prior to "Approving" their review. This is done similar to when the reviewer uploads a review, except the appropriate check boxes must be checked by the Reviewer.



Permitted

- Once the Building Official receives notice that all reviews have been "Approved" they will place the building permit stamp on the final construction documents and upload the "Approved" plans to the EDMS. *Cont. on next page*

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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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

Application | Submittals | Deferred Submittals | Special Inspections | Structural Observations | Add/Edit Users | Inspections | C.O./Final

Complete Submittal: Permitted Documents

UPLOAD *2nd*

+ Add More Files

Type	File	Description	Remove
Plans	Choose File Permitted Set.pdf	Permitted Set.pdf	

UPLOAD OPTIONS

Complete Submittal: ☑ Yes *3rd*

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.

Upload Files

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Permitted

- 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.

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9. Perform Inspections

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

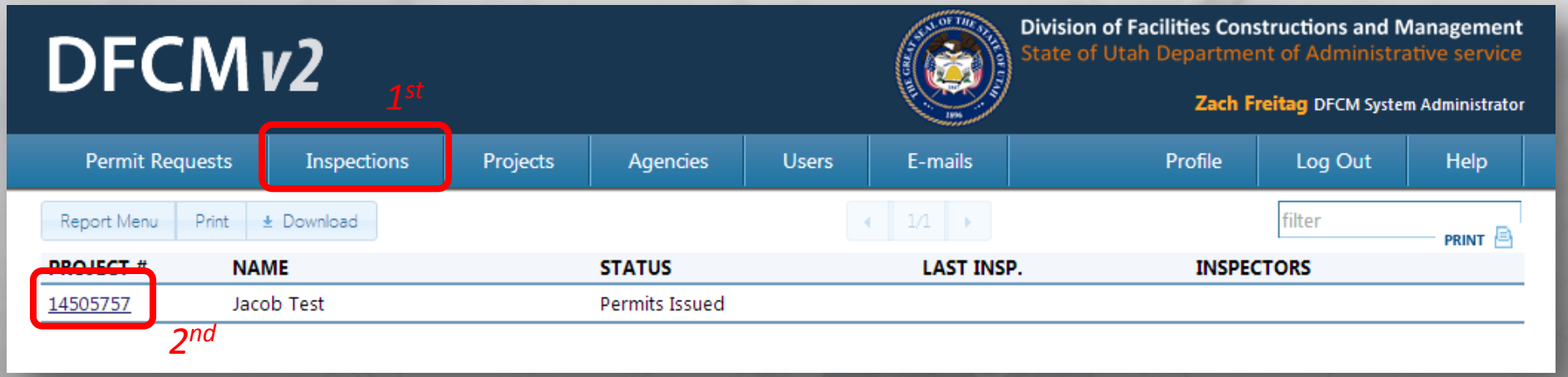
#9a Inspections Start
DFCM Building Official
Building Official assigns Inspectors

#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

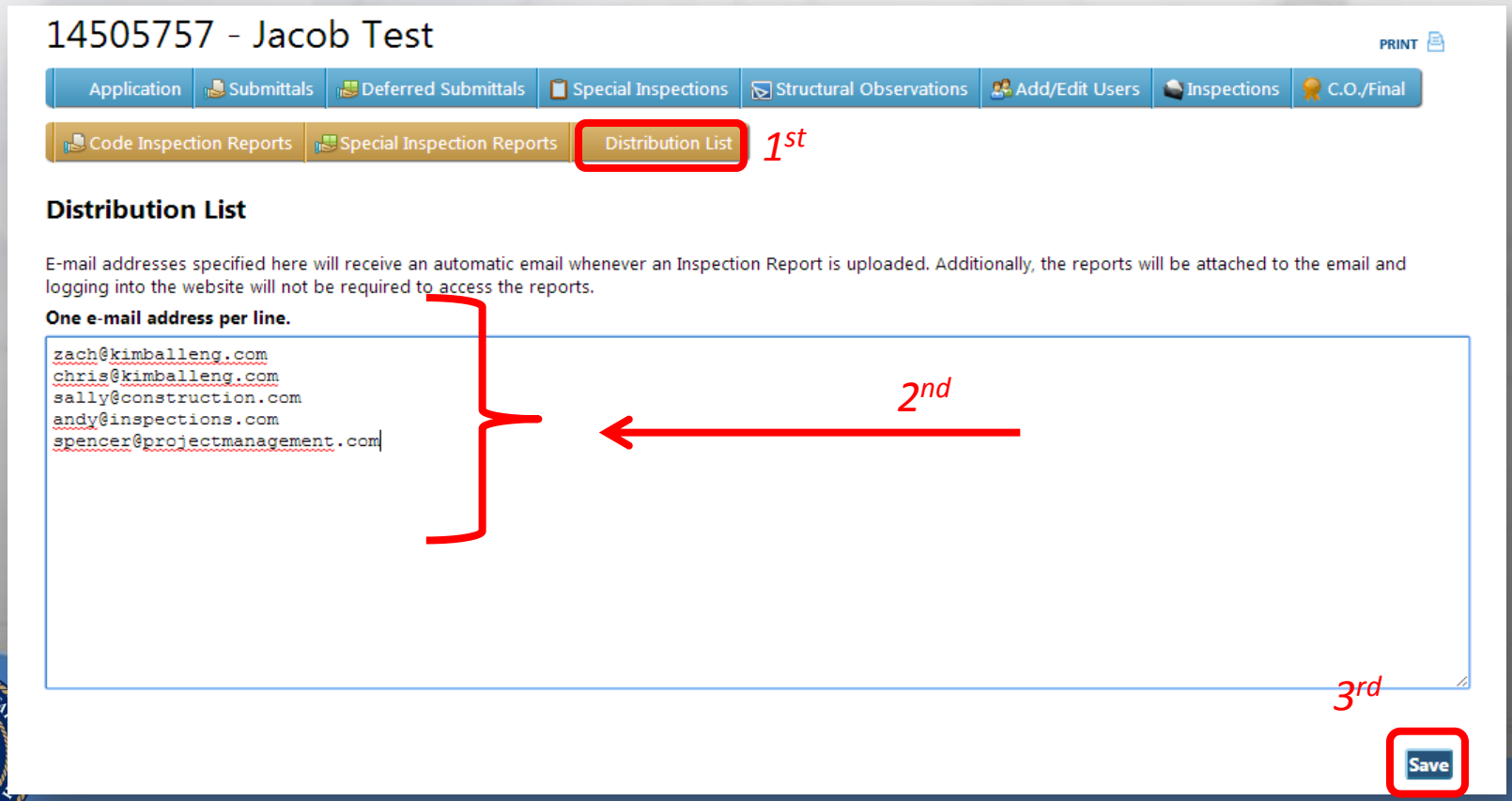
Perform Inspections

- The CIF logs into the EDMS and clicks on the "Inspections" tab at the top of the page and then on the project in question.
- Sometime prior to commencing construction the DFCM Administrator will assign a Code Inspection Firm (CIF) to the project and grant them access to the system.



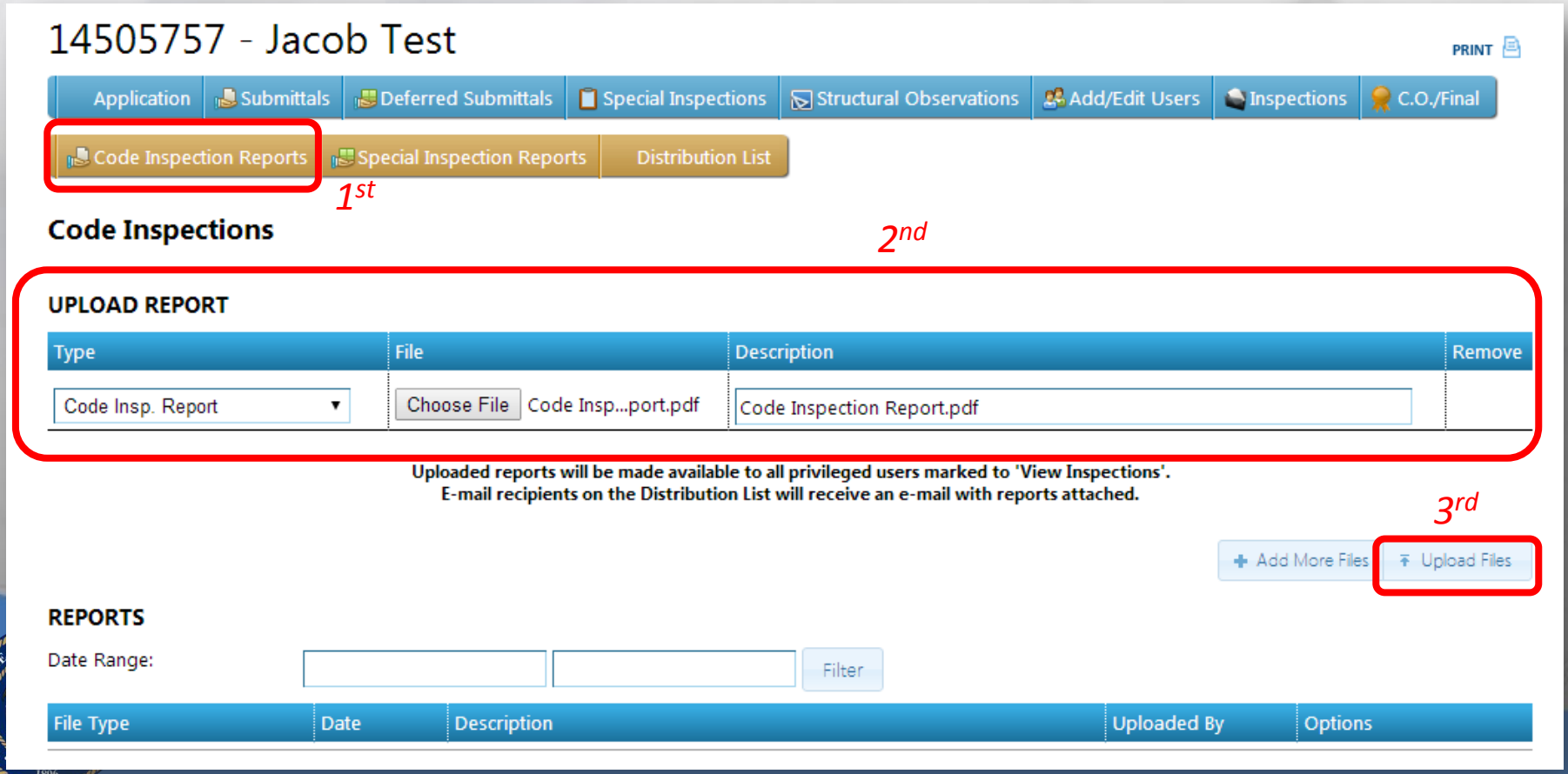
Perform Inspections

- The first step is to click on the "Distribution List" tab and to input the emails of the persons that should be receiving code inspection and special inspection reports throughout the project (i.e. Building Official, PM, Project Contact, Contractor, etc.).



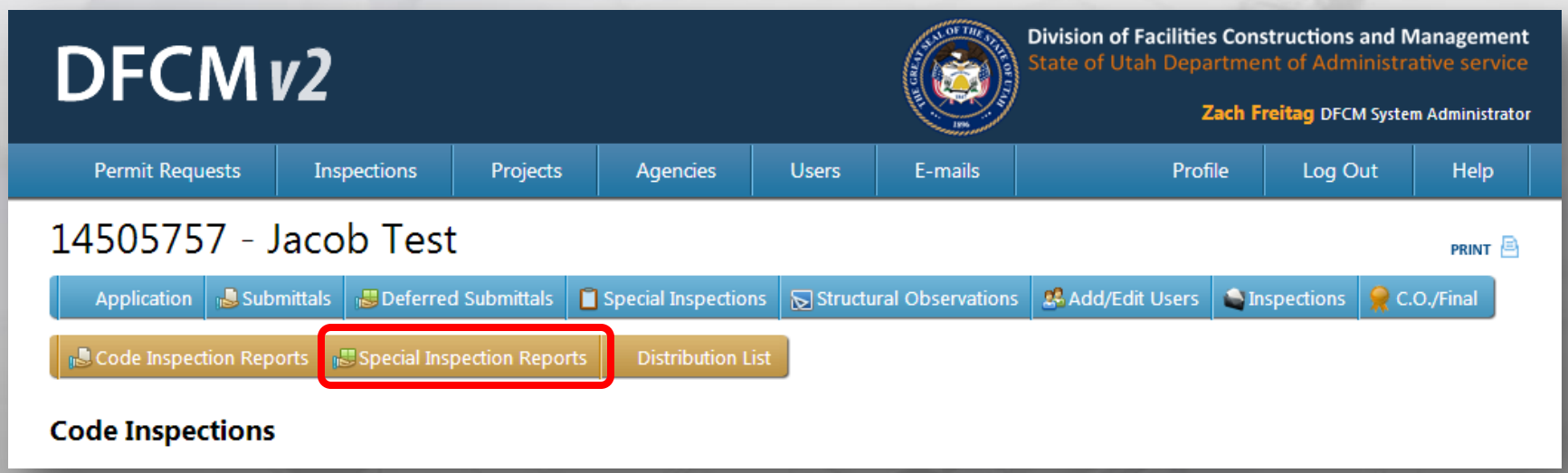
Perform Inspections

- 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.



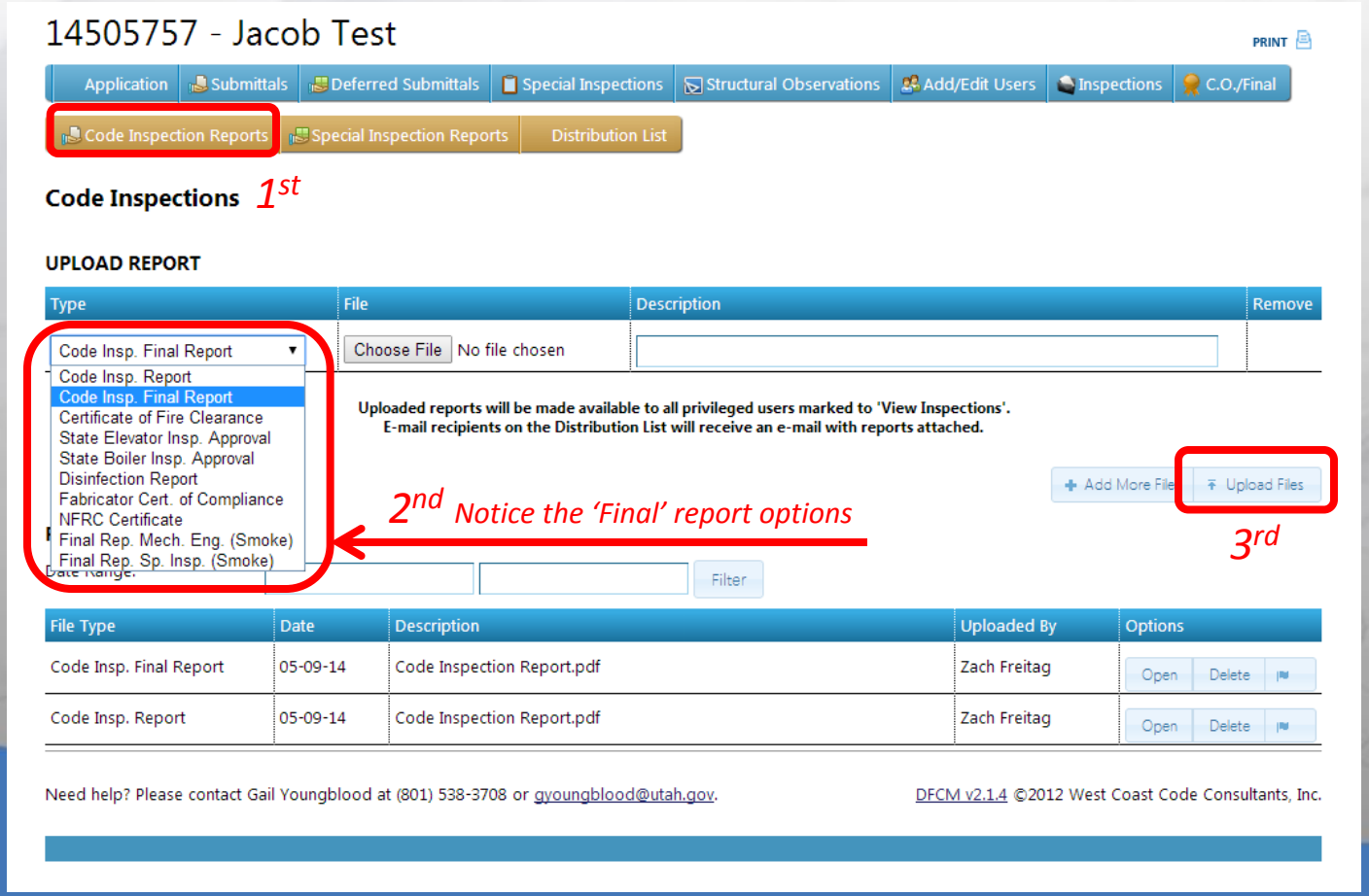
Perform Inspections

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



Perform Inspections

- Similar to the steps listed above to upload reports, however the reports are marked as 'Final Reports' and allow for the Building Official to upload a Certificate of Occupancy in Step #10.



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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

CO Issued

- A "final" code inspection report and special inspection report is required before the building official can issue a Certificate of Occupancy (CO). These reports are added as noted in the end step 9, i.e. the "final" report is selected from the drop-down list under the "Type" tab.

- Prior to issuing a CO, all listed deferred submittals and structural observations reports will need to have been submitted to the EDMS similar to the original construction documents and approved by the assigned reviewers.

  - *The next page shows the process of issuing a CO.*

14505757 - Jacob Test

PRINT

Application | Submittals | Deferred Submittals | Special Inspections | Structural Observations | Add/Edit Users | Inspections | C.O./Final

1st

C.O. | Final | T.C.O.

2nd

Certificate of Occupancy

Once a project is completed and all necessary inspections have been made, the State Building Official or assigned Administrators will upload a Certificate of Occupancy here. Whenever a certificate is uploaded, the Project Manager, all State Building Officials and the Architect will receive an e-mail confirmation. Certificates can be uploaded once all submittals are accepted and all final reports have been recieved.

Project Status

- ✔ Submittal Phases Complete: 1/1
- ✔ Deferred Submittals Complete: 0/0
- ✔ Special Inspection Final Report Not Uploaded and Not Required N/A: ☑
- ✔ Structural Observations Final Report Not Uploaded and Not Required N/A: ☑
- ✔ Certificate of Fire Clearance Not Uploaded and Not Required N/A: ☑
- ✔ State Elevator Inspector Approval Not Uploaded and Not Required N/A: ☑
- ✔ State Boiler Inspector Approval Not Uploaded and Not Required N/A: ☑
- ✔ Disinfection Report for Potable Water System Not Uploaded and Not Required N/A: ☑
- ✔ NFRC Certificate(s) Not Uploaded and Not Required N/A: ☑
- ✔ Final Report From Mechanical Engineer (Smoke Control) Not Uploaded and Not Required N/A: ☑
- ✔ Final Report From Special Inspector (Smoke Control) Not Uploaded and Not Required N/A: ☑
- ✔ Code Inspection Final Report Uploaded

3rd

CERTIFICATE

Type	File	Description	Remove
Certificate of Occupancy ▾	Choose File No file chosen		

+ Add More Files | Upload Files

CO Issued

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



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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

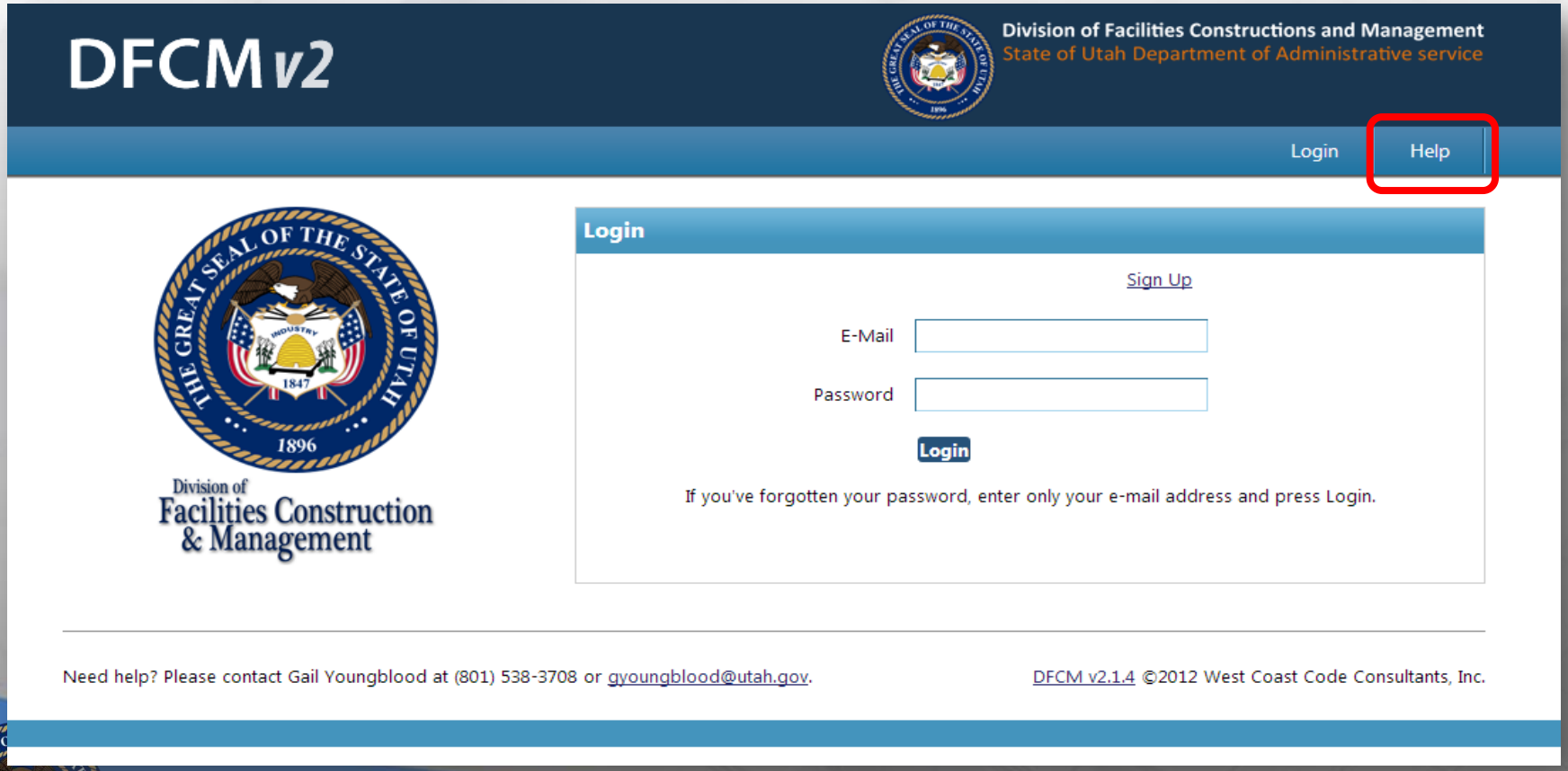
#9b Inspection Reports Uploaded
Code Inspectors
Code Inspectors upload daily and final inspection reports

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

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B. Help Menu

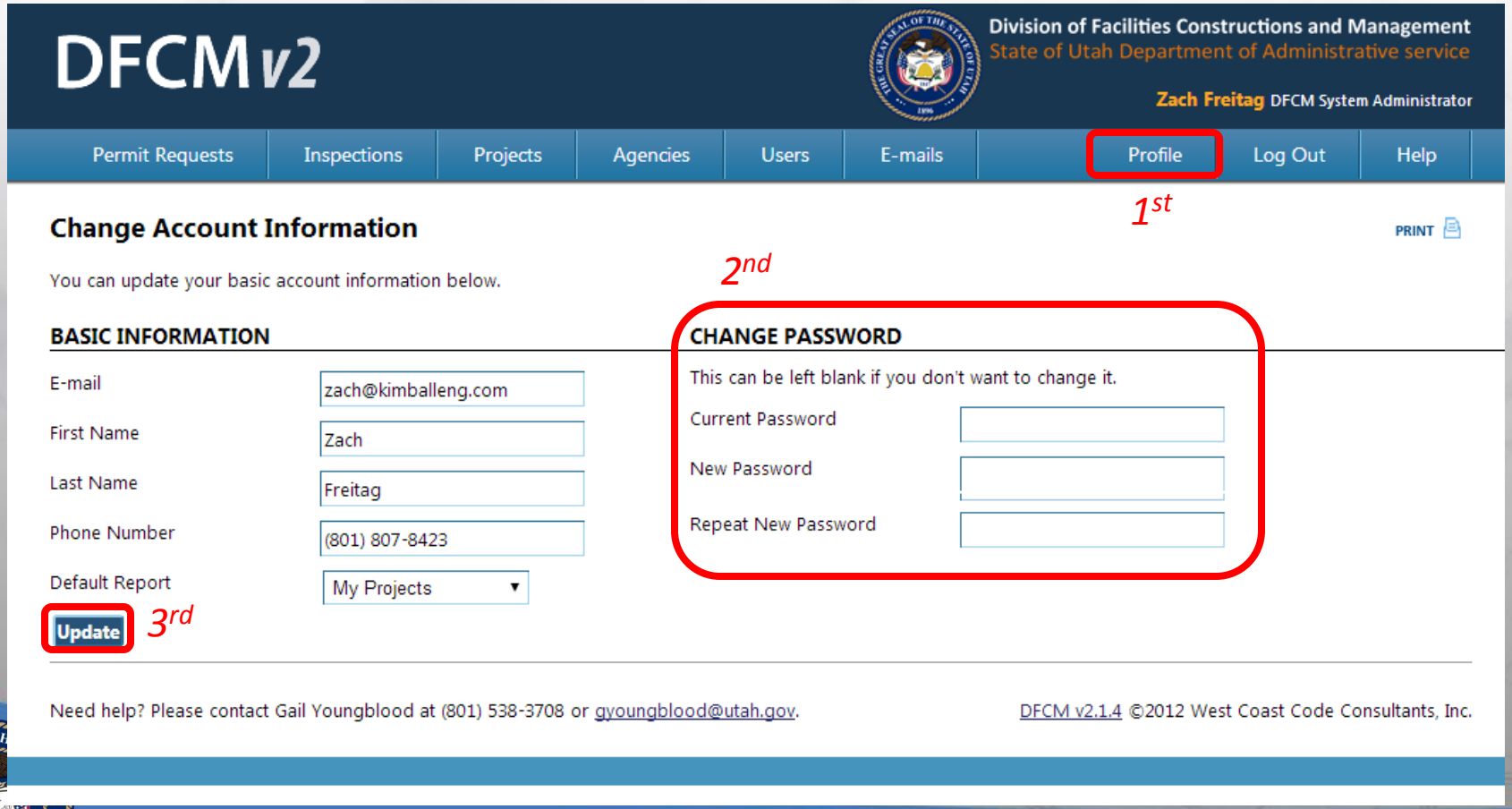
- Help can be found within the system itself. The help menu contains the written instructions that are found in this guide.



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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."



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D. See All Projects

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



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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. It can help with knowing what process comes next.

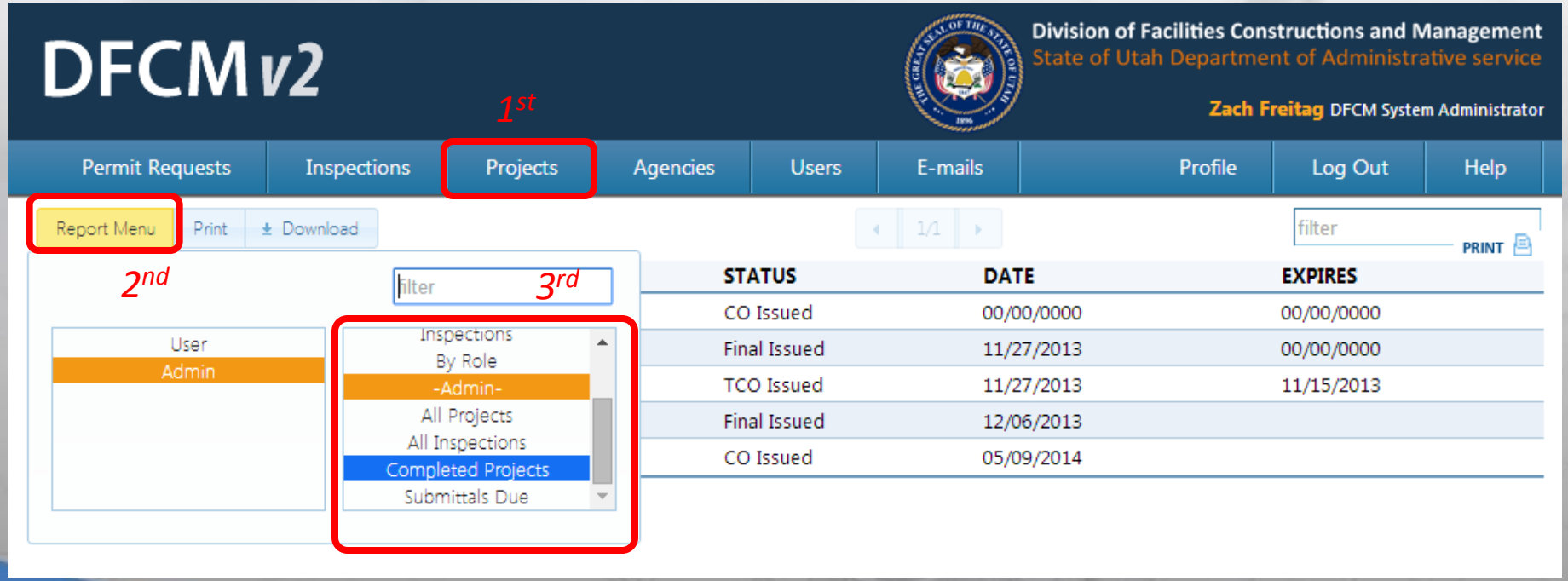


PROJECT #	NAME	STATUS	REVIEWERS/INSPECTORS	PROJ. MANAGERS	DELETE
16515756	deferred checkoff test	Under Review		Jacob Privalsky	delete
14515759	New Notifications Test	Under Review	C. Kimball	Jacob Privalsky, Chris Kimball	delete
14505759	New Download Test	Final Issued	R. Cranston, B. Juszcak, A. Pavoni	Jacob Privalsky	delete
14505758	Test 2	TCO Issued	A. Mahtinkah, C. Kimball	Jacob Privalsky, Alex Booth	delete
14505757	Jacob Test	Final Issued	A. Mahtinkah	Jacob Privalsky	delete
14505757	Jacob Test	CO Issued	C. Kimball	Zach Freitag	delete
14505756	blablablabalb	Awaiting 1st		Jacob Privalsky	delete
14505755	faefaef	Verifying 1st		Jacob Privalsky	delete
13348310	DAS FLEET OPERATIONS REMODEL	Under Review	E. Calfa		delete
13348310	DAS FLEET OPERATIONS REMODEL	Application Incomplete			delete

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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.



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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

- After clicking on "Zip and Download (Custom) a page allowing the downloads to be selected will appear. Check the boxes of the files to download then 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.



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