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. Upload documents (DP)
4. Verify complete submittal (PM)
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 uploaded, 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
Begin a New Project

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

DFCM v2
Division of Facilities Construction and Management
State of Utah Department of Administrative Service

Login

E-Mail
Password

Sign Up
Login

If you've forgotten your password, enter only your e-mail address and press Login.

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

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

DFCM\(^2\)

DFCM: New Permit Request

Project Number: 14505757
Project Title: Jacob Test
Agency: University Of Utah
Date: 2014-05-09 14:58:24

A new permit request has been received for the project referenced above.

DFCM Administrator: Please login to review and approve this permit request.

URL: http://dfcmdev.eprocess360.com/permits/view/440
The AD will first need to login to access the permit request screen.
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.
3. Upload 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

**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.

**First Submittal:** Complete each of the four steps

- **Submittals**
  - Click the 'View/Upload Submittal' button to complete your first submittal to the first phase.

- **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...
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.
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.
14505757 - Jacob Test

Complete Submittal: Submittal #1 (New)

UPLOAD SUBMITTAL DOCUMENTS

<table>
<thead>
<tr>
<th>Type</th>
<th>File</th>
<th>Description</th>
<th>Remove</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transmittal Letter</td>
<td>Choose File</td>
<td>Transmittal Letter.pdf</td>
<td></td>
</tr>
<tr>
<td>Plans</td>
<td>Choose File</td>
<td>Plans.pdf</td>
<td></td>
</tr>
<tr>
<td>Structural Calculations</td>
<td>Choose File</td>
<td>Structural Calculations.pdf</td>
<td></td>
</tr>
<tr>
<td>Geotechnical Reports</td>
<td>Choose File</td>
<td>Geotechnical Report.pdf</td>
<td></td>
</tr>
<tr>
<td>Specifications</td>
<td>Choose File</td>
<td>Specifications.pdf</td>
<td></td>
</tr>
<tr>
<td>Energy Reports</td>
<td>Choose File</td>
<td>Energy Compliance Reports.pdf</td>
<td></td>
</tr>
</tbody>
</table>

UPLOAD OPTIONS

Related to Review(s):

Complete Submittal: Yes

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.
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.

Success

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
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.

Note: the progress bar shows the submittals step is complete.
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

2nd - Click done.
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.
After all four submittal steps have 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

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 Review
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 uploaded,
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

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.
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.
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
  - **Plan Review**
    - #5 Plan Reviewers Assigned
      - **DFCM Building Official**
    - #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 uploaded, 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 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

14505757 - Jacob Test

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.

<table>
<thead>
<tr>
<th>EXISTING USERS</th>
<th>CONTRACTOR: HFS ARCHITECTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jim Moore*</td>
<td>Architect</td>
</tr>
<tr>
<td><a href="mailto:jim@mvengr.net">jim@mvengr.net</a></td>
<td>(435) 734-9700</td>
</tr>
<tr>
<td>Zach Freitag</td>
<td>DFCM Project Manager</td>
</tr>
<tr>
<td><a href="mailto:zach@kimballeng.com">zach@kimballeng.com</a></td>
<td>(801) 807-8423</td>
</tr>
<tr>
<td>2nd</td>
<td>6 Permission(s)</td>
</tr>
</tbody>
</table>

ADD USER TO PROJECT

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

View Application | Edit Application
Project Reviews & Assigned Reviewers

This project is in the main submittal/comment cycle, so make sure that reviews are properly assigned to the first Submittal for all required reviews. If necessary, you may add additional reviewers.

Potential reviewers only appear in the drop-downs below when they are given the 'Plan Reviewer' role on the Add/Edit Users page. Setting an option to 'New Review' will delete any review data for that item/review type. Setting an option to 'Unassigned' will not clear existing data and will require that the review be completed before the Submittal or Deferred Submittal can be marked as complete.

**SUBMITTALS**

<table>
<thead>
<tr>
<th></th>
<th>Building Code</th>
<th>Structural</th>
<th>Fire &amp; Life Safety</th>
<th>Risk Management</th>
<th>Other</th>
</tr>
</thead>
<tbody>
<tr>
<td>Complete Submittal</td>
<td>Chris Kimball</td>
<td>Chris Kimball</td>
<td>Chris Kimball</td>
<td>Chris Kimball</td>
<td>Unassigned</td>
</tr>
</tbody>
</table>

**Deferred Submittals**

<table>
<thead>
<tr>
<th></th>
<th>Building Code</th>
<th>Structural</th>
<th>Fire &amp; Life Safety</th>
<th>Risk Management</th>
<th>Other</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>No Review</td>
<td>Unassigned</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

If a reviewer is assigned one or more reviews, they will receive an email notification.
6. Perform Review

**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 uploaded, 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 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.
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.

Success

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

The following items were uploaded:

Comment-Letter.pdf

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

<table>
<thead>
<tr>
<th>REVIEWS</th>
<th>By</th>
<th>Status</th>
<th>History</th>
</tr>
</thead>
<tbody>
<tr>
<td>Building Code</td>
<td>Chris Kimball</td>
<td>Comments Issued</td>
<td>05-09-14 #1: Comments Issued</td>
</tr>
<tr>
<td>Structural</td>
<td>Chris Kimball</td>
<td>Comments Issued</td>
<td>05-09-14 #1: Comments Issued</td>
</tr>
</tbody>
</table>

**SUBMITTALS**

<table>
<thead>
<tr>
<th>Submittal #</th>
<th>Status</th>
<th>Date</th>
<th>Files</th>
<th>By</th>
<th>Regarding</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Complete</td>
<td>05-09-14</td>
<td>6</td>
<td>Zach Freitag</td>
<td>All Review Types</td>
<td></td>
</tr>
</tbody>
</table>

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

DFCM v2.14 ©2012 West Coast Code Consultants, Inc.
14505757 - Jacob Test

Complete Submittal: Submittal #2 (New)

Upload Submittal Documents

<table>
<thead>
<tr>
<th>Type</th>
<th>File</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transmittal Letter</td>
<td>Choose File</td>
<td>Transmittal...letter.pdf</td>
</tr>
<tr>
<td>Plans</td>
<td>Choose File</td>
<td>Plans.pdf</td>
</tr>
</tbody>
</table>

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
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.

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

6. **Plan Review**
   - Reviewers Plan Review begins: If the plans require corrections, comments are issued, otherwise approval letters are uploaded

**Resubmittal**

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 uploaded, 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
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.
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

<table>
<thead>
<tr>
<th>Review Type</th>
<th>By</th>
<th>Status</th>
<th>History</th>
</tr>
</thead>
<tbody>
<tr>
<td>Building Code</td>
<td>Chris Kimball</td>
<td>Accepted Submittal</td>
<td>05-09-14 #2: Accepted</td>
</tr>
<tr>
<td>Structural</td>
<td>Chris Kimball</td>
<td>Accepted Submittal</td>
<td>05-09-14 #2: Accepted</td>
</tr>
</tbody>
</table>

### SUBMITTALS

<table>
<thead>
<tr>
<th>Submittal #</th>
<th>Status</th>
<th>Date</th>
<th>Files</th>
<th>By</th>
<th>Regarding</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>Complete</td>
<td>05-09-14</td>
<td>2</td>
<td>Zach Freitag</td>
<td>Structural, Building Code</td>
<td></td>
</tr>
<tr>
<td>1</td>
<td>Complete</td>
<td>05-09-14</td>
<td>6</td>
<td>Zach Freitag</td>
<td>All Review Types</td>
<td></td>
</tr>
</tbody>
</table>

Need help? Please contact Gail Youngblood at (801) 538-3708 or gyoungblood@utah.gov.
### Complete Submittal: Permitted Documents

**UPLOAD**

<table>
<thead>
<tr>
<th>Type</th>
<th>File</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Plans</td>
<td>Choose File</td>
<td>Permitted Set.pdf</td>
</tr>
</tbody>
</table>

**UPLOAD OPTIONS**

- **Complete Submittal:** Yes

Complete the 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.

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

**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 uploaded, 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 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.

![Image of the application interface showing code inspection reports and upload process.]
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”.

1. Notice the ‘Final’ report options.


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 uploaded, 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
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...
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.

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 received.

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

Certificate

<table>
<thead>
<tr>
<th>Type</th>
<th>File</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Certificate of Occupancy</td>
<td>Choose File</td>
<td>No file chosen</td>
</tr>
</tbody>
</table>
Once everything is complete the Building Official uploads the signed "Certificate of Occupancy" form to the EDMS.

Success

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

The following items were uploaded:

Certificate-of-Occupancy.pdf
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 uploaded, 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.”
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.

---

**DFCM v2**

1st

<table>
<thead>
<tr>
<th>Permit Requests</th>
<th>Inspections</th>
<th>Projects</th>
<th>Agencies</th>
<th>Users</th>
<th>E-mails</th>
<th>Profile</th>
<th>Log Out</th>
<th>Help</th>
</tr>
</thead>
</table>

2nd

- Report Menu

3rd

- User
  - Admin
- Inspections
  - By Role
- Admin
- All Projects
- Completed Projects
- Submittals Due

---

<table>
<thead>
<tr>
<th>STATUS</th>
<th>DATE</th>
<th>EXPIRES</th>
</tr>
</thead>
<tbody>
<tr>
<td>CO Issued</td>
<td>00/00/0000</td>
<td>00/00/0000</td>
</tr>
<tr>
<td>Final Issued</td>
<td>11/27/2013</td>
<td>00/00/0000</td>
</tr>
<tr>
<td>TCO Issued</td>
<td>11/27/2013</td>
<td>11/15/2013</td>
</tr>
<tr>
<td>Final Issued</td>
<td>12/06/2013</td>
<td>11/15/2013</td>
</tr>
<tr>
<td>CO Issued</td>
<td>05/09/2014</td>
<td>11/15/2013</td>
</tr>
</tbody>
</table>
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.
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.