

# ELECTRONIC DOCUMENT MANAGEMENT SYSTEM

## DFCM User's Guide

For Questions Contact:

Gail Youngblood ([gyoungblood@utah.gov](mailto:gyoungblood@utah.gov); 801.538.3708)

Logan Brown ([loganb@wc-3.com](mailto:loganb@wc-3.com); 801.547.8133)



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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# 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 Help

  
Division of  
Facilities Construction  
& Management

**Login**

Sign Up

E-Mail

Password

**Login**

[If you've forgotten your password, enter only your e-mail address and press Login.](#)

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# 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.

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Zach Freitag DFCM System Administrator

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

Report Menu Print Download 1/38 filter PRINT

PROJECT #	NAME	STATUS	REVIEWERS/INSPECTORS	PROJ. MANAGERS	DELETE
<a href="#">16515756</a>	deferred checkoff test	Under Review		Jacob Privalsky	<a href="#">delete</a>
<a href="#">14515759</a>	New Notifications Test	Under Review	C. Kimball	Jacob Privalsky, Chris Kimball	<a href="#">delete</a>
<a href="#">14505759</a>	New Download Test	Final Issued	R. Cranston, B. Juszczak, A. Pavoni	Jacob Privalsky	<a href="#">delete</a>
<a href="#">14505758</a>	Test 2	TCO Issued	A. Mahtinkah, C. Kimball	Jacob Privalsky, Alex Booth	<a href="#">delete</a>
<a href="#">14505757</a>	Jacob Test	Final Issued	A. Mahtinkah	Jacob Privalsky	<a href="#">delete</a>



# 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 screenshot shows the DFCM v2 web application interface. At the top left, the text "DFCM v2" is displayed. To the right is the Utah State Seal and the text "Division of Facilities Constructions and Management, State of Utah Department of Administrative service". Below this is the user name "Zach Freitag DFCM System Administrator". A navigation bar contains buttons for "Permit Requests", "Inspections", "Projects", "Agencies", "Users", "E-mails", "Profile", "Log Out", and "Help".

The main content area is titled "Permits" and includes a "PRINT" icon. Below the title are filter buttons for "All", "Application Pending", and "Application Complete". There are also navigation arrows, a "Find" search box, a "+ New Application" button (highlighted with a red box), and a "Download" button.

PROJECT #	NAME	STATUS	REVIEWERS/INSPECTORS
<a href="#">13321520</a>	Lee Kay Center For Hunter Education- Pistol Range Reconstruction	Application Incomplete	
<a href="#">13321520</a>	Lee Kay Center For Hunter Education- Pistol Range Reconstruction	Application Incomplete	
<a href="#">13326480</a>	Camp Williams JLTC Bldg #6	Application Incomplete	
<a href="#">14505757</a>	Jacob Test	Application Incomplete	
<a href="#">13348310</a>	DAS FLEET OPERATIONS REMODEL	Application Incomplete	
<a href="#">12271150</a>	New Juab County Courts	Application Incomplete	



# 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.

## DFCM v2

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State of Utah Department of Administrative Service  
Zach Freitag DFCM System Administrator

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

### DFCM Building Permit Application: Step 1

You will remain logged in while you are on this page and connected to the Internet. Fields marked with an asterisk are required.

**BASIC INFORMATION**

Project Number\*  Address Line 1\*   
Project Name\*  Address Line 2   
Valuation\*  City\*   
Property #\*  State/ZIP\*   
 Project Address Not Applicable

**AGENCY**

Agency  Other Organization  
Agency\*

**SPECIFY COMPANY SUBMITTING PLANS**

Company\*

**WORK DESCRIPTION**

Project Category\*  Addition  Remodel  New Construction  Other  
Brief Description of Project\*

**USE**  Not Applicable

Occupancy\*  A-1  A-2  A-3  A-4  A-5  B  E  F-1  F-2  
 H-1  H-2  H-3  I-1  I-2  I-3  I-4  M  R-1  
 R-2  R-3  R-4  S-1  S-2  U

Construction Type\*  Stories\*  Building Floor Area\*  ft<sup>2</sup> Building Height\*  ft  
Design Occupant Load\*

**FIRE PROTECTION**  Not Applicable

Required\*  Yes  No  Unknown Type\*   Other  
Provided\*  Yes  No  Unknown

**ELEVATOR**  No  Yes  
Will an elevator be installed as part of this work?

**BOILER**  No  Yes  
Will a boiler be installed as part of this work?

**WATER**  No  Yes  
Will potable water piping be installed as part of this work?

**NFRC**  No  Yes  
Will this project require any site-built fenestration, or will all glazing include an NFRC label?

**SMOKE CONTROL**  No  Yes  
Will a smoke control system be required for this project?

**SUBMITTAL TYPE**

Complete/Phased:  Complete Submittal  Phased Submittal



# 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).

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

**DFCM Building Permit Application: Step 2** PRINT

You will remain logged in while you are on this page and connected to the Internet.

**PROJECT CONTACT** CONTRACTOR: HFS ARCHITECTS

The person specified here will be given privileges to upload submittals on behalf of **HFS Architects**. They will receive instructions for logging in and submitting documents after a DFCM Administrator has approved the permit request.

Contact Name\* Jim Moore (435) 734-9700 Search... Add New Contact **1st**

**SUBMITTAL PHASES**

Complete Submittal (No Phases)

Complete Submittal Edit

**Submit for Approval** Revise Step 1 **2nd**



# 2. Accept Application

## 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



# Accept Application

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



The screenshot displays the DFCM v2 web application interface. At the top left, the text "DFCM v2" is prominently displayed. To the right of this text is the official seal of the State of Utah, featuring a figure holding a bow and arrow, surrounded by the words "THE GREAT SEAL OF THE STATE OF UTAH" and the year "1896". Below the header is a navigation menu with six tabs: "Permit Requests", "Inspections", "Projects", "Agencies", "Users", and "E-mails". The main content area is titled "DFCM: New Permit Request" and contains the following information:

**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>




# Accept Application

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

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Login Help

  
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Password

**Login**

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

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# 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).

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Zach Freitag DFCM System Administrator

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

**Permits** 1st PRINT

All Application Pending Application Complete Find + New Application Download

PROJECT #	NAME	STATUS	REVIEWERS/INSPECTORS
<span>14505757*</span> <span>2nd</span>	Jacob Test	Application Complete	<i>* Indicates you are specifically involved with a project.</i>

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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.

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

**Permit Request** [Zip and Download \(Custom\)](#)

**BASIC INFORMATION**

Project Number: 14505757  
Project Name: Jacob Test  
Valuation: \$10,000,000  
Property #: 2425235  
Agency: University Of Utah

**WORK DESCRIPTION**

Type of Work: New Construction  
Brief Description of Project: svsvdsvsvdsv

**USE**

Occupancy Type: A-1  
Construction Type: IA  
Design Occupant Load: 100

**FIRE PROTECTION**

Required: No  
Provided: Yes  
Type: NFPA 13

**ELEVATOR**

An elevator will be installed as part of this work.

**BOILER**

A boiler will be installed as part of this work.

**BOILER**

A boiler will be installed as part of this work.

**WATER**

Potable water piping will be installed as part of this work.

**NFRC**

The project will require site-built fenestrations or glazing will include an NFRC label.

**SMOKE CONTROL**

A smoke control system will be required for this project.

**SUBMITTAL TYPE**

Complete/Phased: Complete Submittal [Edit Submittal Phases](#)

**PROJECT USERS** **CONTRACTOR: HFS ARCHITECTS \***

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

[Accept Application](#) [Edit Application](#) [Edit Users](#)

# 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

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

**#7 Resubmittal**  
**Architect/Engineer**  
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**#8 Permitted**  
**DFCM Building Official**  
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**#9a Inspections Start**  
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**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



# Upload Documents

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

DFCM v2



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Zach Freitag DFCM System Administrator

Permit Requests

Inspections

Projects

Agencies

Users

E-mails

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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.



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# 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.

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Login Help

  
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**Login**

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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](mailto:gyoungblood@utah.gov).

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# 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.

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State of Utah Department of Administrative Service  
Zach Freitag DFCM System Administrator

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

Report Menu | Print | Download | 1/1 | filter | PRINT

PROJECT #	NAME	STATUS	REVIEWERS/INSPECTORS	PROJ. MANAGERS
<b>14505757</b>	Jacob Test	Awaiting 1st		Zach Freitag



# 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.

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Zach Freitag DFCM System Administrator

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

### 14505757 - Jacob Test

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

First Submittal: Complete each of the four steps

**Project Description**

**BASIC INFORMATION**

Project Number:	14505757	Address:	2400 Camino
Project Name:	Jacob Test		
Valuation:	\$10,000,000		San Ramon, C
Property #:	2425235		
Agency:	University Of Utah		

**WORK DESCRIPTION**

Type of Work:	New Construction
Brief Description of Project:	svsvsvsvsvsdv

**USE**

Occupancy Type:	A-1				
Construction Type:	IA	Stories:	2	Building Floor Area:	1,000 ft2
Design Occupant Load:	100				

**FIRE PROTECTION**

Required:	No
Provided:	Yes
Type:	NFPA 13

**FIRE PROTECTION**

Required:	No
Provided:	Yes
Type:	NFPA 13

**FIRE PROTECTION**

Required:	No
Provided:	Yes
Type:	NFPA 13

**FIRE PROTECTION**

Required:	No
Provided:	Yes
Type:	NFPA 13

**ELEVATOR**

An elevator will be installed as part of this work.

**BOILER**

A boiler will be installed as part of this work.

**WATER**

Potable water piping will be installed as part of this work.

**NFRC**

The project will require site-built fenestrations or glazing will include an NFRC label.

**SMOKE CONTROL**

A smoke control system will be required for this project.

**SUBMITTAL TYPE**

Complete/Phased:	Complete Submittal
------------------	--------------------

**PROJECT USERS**

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

**CONTRACTOR: HFS ARCHITECTS \***

[Edit Submittal Phases](#)

[Edit Application](#) [Edit Users](#)



# 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.

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

First Submittal: Complete each of the four steps

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

Done

Phase Item	1st Sub	Newest	Sub #	Review Type	Status	Action
------------	---------	--------	-------	-------------	--------	--------

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

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



# 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.

The screenshot displays the DFCM v2 web application interface. At the top, the header includes the logo for the State of Utah, the text "Division of Facilities Constructions and Management State of Utah Department of Administrative service", and the name "Zach Freitag DFCM System Administrator". Below the header is a navigation menu with tabs for "Permit Requests", "Inspections", "Projects", "Agencies", "Users", "E-mails", "Profile", "Log Out", and "Help".

The main content area shows a project titled "14505757 - Jacob Test" with a "PRINT" icon. Below this is a horizontal navigation bar with tabs: "Application", "Submittals" (highlighted with a red box), "Deferred Submittals", "Special Inspections", "Structural Observations", "Add/Edit Users", "Inspections", and "C.O./Final".

A progress indicator below the tabs shows a timeline with four steps. The first step is highlighted with a red circle and labeled "1st".

The "Submittals" section contains a table with the following data:

Phase Item	1st Sub.	Newest	Sub. #	Review Type	Status	ACTION
Complete Submittal	Not Submitted			Assign Reviewers...	Awaiting Submittal	View/Upload Submittal

The "View/Upload Submittal" button in the table is highlighted with a red box and labeled "2nd".

A yellow tooltip box is visible over the table, containing the text: "Submittals Click the 'View/Upload Submittal' button to complete your first submittal to the first phase. ↓ ↓ ↓" and a "Done" button.

At the bottom of the page, there is a footer with the text: "Need help? Please contact Gail Youngblood at (801) 538-3708 or [gyoungblood@utah.gov](mailto:gyoungblood@utah.gov). DFCM v2.1.4 ©2012 West Coast Code Consultants, Inc."

# 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    Modify Reviewers

Review Type	By	Status	History
	Not Assigned...	Awaiting Submittal	<input type="button" value=""/>

---

**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.*





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

### Complete Submittal: Submittal #1 (New)

1<sup>st</sup>

#### 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'.

#### UPLOAD SUBMITTAL DOCUMENTS

[+ Add More Files](#)

Type	File	Description	Remove
Transmittal Letter	<input type="button" value="Choose File"/> Transmitta...etter.pdf	<input type="text" value="Transmittal Letter.pdf"/>	
Plans	<input type="button" value="Choose File"/> Plans.pdf	<input type="text" value="Plans.pdf"/>	<input type="button" value="X"/>
Structural Calculations	<input type="button" value="Choose File"/> Structural...tions.pdf	<input type="text" value="Structural Calculations.pdf"/>	<input type="button" value="X"/>
Geotechnical Reports	<input type="button" value="Choose File"/> Geotechni...port.pdf	<input type="text" value="Geotechnical Report.pdf"/>	<input type="button" value="X"/>
Specifications	<input type="button" value="Choose File"/> Specifications.pdf	<input type="text" value="Specifications.pdf"/>	<input type="button" value="X"/>
Energy Reports	<input type="button" value="Choose File"/> Energy Co...orts.pdf	<input type="text" value="Energy Compliance Reports.pdf"/>	<input type="button" value="X"/>

#### 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

2<sup>nd</sup>

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

Remember to mark the upload 'Complete Submittal' if it's complete. You can also mark it from the submittal summary page by clicking the 'View' button.

3<sup>rd</sup>

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

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# 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.



The screenshot displays the DFCM v2 web application interface. At the top left, the text "DFCM v2" is visible. To the right is the official seal of the State of Utah, followed by the text "Division of Facilities Construction and Management" and "State of Utah Department of Administrative Service". Below this, the name "Zach Freitag" and title "DFCM System Administrator" are shown. A navigation bar contains links for "Permit Requests", "Inspections", "Projects", "Agencies", "Users", "E-mails", "Profile", "Log Out", and "Help". The main content area features a "Success" message: "Your upload and/or setting submission was successful. [Click here](#) to continue." The "Click here" link is highlighted with a red rectangle. Below the message, a section titled "The following items were uploaded:" lists five files: "Transmittal-Letter.pdf", "Plans.pdf", "Structural-Calculations.pdf", "Geotechnical-Report.pdf", and "Energy-Compliance-Reports.pdf". A "PRINT" button with a printer icon is located in the top right corner of the message area.



# 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.

**DFCM v2** Division of Facilities Construction 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

**Deferred Submittals**  
There are no submittals to show. *1st*

**Deferred Submittal Items**

	due date	Add Item

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

**Deferred Submittals** *2nd*  
List all Deferred Submittals, if applicable, then click Done.

**Done**

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

# 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".

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

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.

### 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

Done

1st - Check the boxes of any required Special Inspections

2nd

# 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.

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

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**

**Done**

*1st* *2nd*



# 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

## 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



# 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.

**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

Report Menu Print Download

PROJECT #	NAME	STATUS	REVIEWERS/INSPECTORS	PROJ. MANAGERS
14505757	Jacob Test	Verifying 1st		Zach Freitag

filter PRINT



# 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.

**DFCM v2** Division of Facilities Construction 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

*1st* + + + + **First Submittal: Inspect submittal**

**Verify Complete First Submittal**  
Check to make sure the Architect/Engineer completed the first submittal, and then click Done. Done

Phase Item	1st Sub.	Newest	Sub. #	Review Type	Status	ACTION
Complete Submittal	05.09	05.09	1	Assign Reviewers...	Awaiting Submittal	<b>View/Upload Submittal</b>

*2nd*

Edit Submittal Phases Edit Reviewers

Need help? Please contact Gail Youngblood at (801) 538-3708 or [gyoungblood@utah.gov](mailto:gyoungblood@utah.gov). DFCM v2.1.4 ©2012 West Coast Code Consultants, Inc.



# 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

**#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



# 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...

The screenshot displays the DFCM v2 web application interface. At the top left, the logo 'DFCM v2' is visible. To the right is the official seal of the State of Utah, with the text 'Division of Facilities Construction and Management' and 'State of Utah Department of Administrative Service'. Below this, the name 'Zach Freitag' is listed as the 'DFCM System Administrator'. A navigation bar contains several tabs: 'Permit Requests', 'Inspections', 'Projects', 'Agencies', 'Users', 'E-mails', 'Profile', 'Log Out', and 'Help'. The main content area shows a project titled '14505757 - Jacob Test' with a '1st' label. A secondary navigation bar includes tabs for 'Application', 'Submittals', 'Deferred Submittals', 'Special Inspections', 'Structural Observations', 'Add/Edit Users' (highlighted with a red box), 'Inspections', and 'C.O./Final'. Below this is a 'Project Description' section with a 'Zip and Download (Custom)' button. A 'BASIC INFORMATION' section is partially visible at the bottom, showing project details.

Project Number:	14505757	Address:	2400 Camino Ramon
Project Name:	Jacob Test		

# Assign Plan Reviewers

## DFCM v2



Division of Facilities Construction 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

## 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	<i>2nd</i> 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



DIVISION OF  
FACILITIES CONSTRUCTION &  
MANAGEMENT

# Assign Plan Reviewers

## DFCM v2



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

Zach Freitag DFCM System Administrator

Permit Requests

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### 14505757 - Jacob Test

PRINT

Application

Submittals

Deferred Submittals

Special Inspections

Structural Observations

Add/Edit Users

Inspections

C.O./Final

### 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

3<sup>rd</sup>

	Building Code	Structural	Fire & Life Safety	Risk Management	Other
Complete Submittal	Chris Kimball	Chris Kimball	Chris Kimball	Chris Kimball	Unassigned

#### DEFERRED SUBMITTALS

	Building Code	Structural	Fire & Life Safety	Risk Management	Other
--	---------------	------------	--------------------	-----------------	-------

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

4<sup>th</sup>



# 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.

**DFCM v2** Division of Facilities Construction 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

Report Menu Print Download 1/1 filter PRINT

PROJECT #	NAME	STATUS	REVIEWERS/INSPECTORS	PROJ. MANAGERS
14505757	Jacob Test	Verifying 1st		Zach Freitag



# 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.*





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 <sup>1st</sup>

#### REVIEWS

[+ New Comment](#) [Modify Reviewers](#)

Review Type	By	Status	History
	Not Assigned...	Awaiting Submittal	<input type="button" value=""/>

#### SUBMITTALS

[+ New Submittal](#) [Expand](#) [Collapse](#)

Submittal #	Status	Date	Files	By	Regarding	Action
1	Complete	05-09-14	6	Zach Freitag	All Review Types	<a href="#">View</a> <a href="#">Unlock</a>

Uploads for Submittal #1 [Zip and Download All](#)

<sup>2nd</sup>

Transmittal Letter	Transmittal Letter.pdf	<a href="#">Open</a>
Plans	Plans.pdf	<a href="#">Open</a>
Structural Calculations	Structural Calculations.pdf	<a href="#">Open</a>
Geotechnical Reports	Geotechnical Report.pdf	<a href="#">Open</a>
Specifications	Specifications.pdf	<a href="#">Open</a>
Energy Reports	Energy Compliance Reports.pdf	<a href="#">Open</a>

<sup>3rd</sup>

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

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# 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.

The screenshot displays the DFCM v2 web application interface. At the top, the header includes the DFCM v2 logo, the Utah State seal, and the text "Division of Facilities Construction and Management, State of Utah Department of Administrative Service". Below the header is a navigation menu with tabs for Permit Requests, Inspections, Projects, Agencies, Users, E-mails, Profile, Log Out, and Help. The main content area shows a submittal titled "14505757 - Jacob Test" with a "PRINT" icon. A secondary navigation bar contains buttons for Application, Submittals, Deferred Submittals, Special Inspections, Structural Observations, Add/Edit Users, Inspections, and C.O./Final. The "Complete Submittal" section features a "REVIEWS" heading and a "+ New Comment" button (highlighted with a red box) and a "Modify Reviewers" button. Below this is a table with columns for Review Type, By, Status, and History. The table contains two rows: one for "Building Code" and one for "Structural", both reviewed by "Chris Kimball" with a status of "Reviewing Submittal(s)". The "SUBMITTALS" section includes a "+ New Submittal" button and "Expand" and "Collapse" buttons. Below this is a table with columns for Submittal #, Status, Date, Files, By, Regarding, and Action. The table contains one row for submittal #1, which is "Complete" as of "05-09-14", has 6 files, was reviewed by "Zach Freitag", and is "Regarding" "All Review Types". The "Action" column for this row contains "View" and "Unlock" buttons.

**DFCM v2**

Division of Facilities Construction 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**

**REVIEWS** + New Comment Modify Reviewers

Review Type	By	Status	History
Building Code	Chris Kimball	Reviewing Submittal(s)	
Structural	Chris Kimball	Reviewing Submittal(s)	

**SUBMITTALS** + New Submittal Expand Collapse

Submittal #	Status	Date	Files	By	Regarding	Action
1	Complete	05-09-14	6	Zach Freitag	All Review Types	<span>View</span> <span>Unlock</span>



# 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.

## Complete Submittal: Comments

### UPLOAD COMMENTS

1<sup>st</sup>

Type	File	Description	Remove
Comments	<input type="button" value="Choose File"/> Comment Letter.pdf	Comment Letter.pdf	

### UPLOAD OPTIONS

Related to Review:

*Indicates what type of review you are submitting for. Should auto-fill.*

2<sup>nd</sup>

Related to Submittal:  1

*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

3<sup>rd</sup>



# 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.



The screenshot displays the DFCM v2 web application interface. At the top left, the text "DFCM v2" is prominently displayed. To the right of this is the official seal of the State of Utah, featuring a figure holding a scale and a sword, surrounded by the words "THE GREAT SEAL OF THE STATE OF UTAH" and the year "1896". Further right, the text reads "Division of Facilities Constructions and Management" and "State of Utah Department of Administrative service". Below this, the name "Zach Freitag" is shown as the "DFCM System Administrator". A navigation bar contains several menu items: "Permit Requests", "Inspections", "Projects", "Agencies", "Users", "E-mails", "Profile", "Log Out", and "Help". The main content area shows a "Success" message with a "PRINT" icon. The message states: "Your upload and/or setting submission was successful. [Click here](#) to continue." Below this, it lists "The following items were uploaded:" followed by "Comment-Letter.pdf". At the bottom of the page, there is a footer with contact information: "Need help? Please contact Gail Youngblood at (801) 538-3708 or [gyoungblood@utah.gov](mailto:gyoungblood@utah.gov)." and the version information: "DFCM v2.1.4 ©2012 West Coast Code Consultants, Inc."



# 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



# 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	<a href="#">View</a> <a href="#">Unlock</a>

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

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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

### Complete Submittal: Submittal #2 (New)

#### UPLOAD SUBMITTAL DOCUMENTS

1st

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

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

2nd

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

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

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# Revise and Resubmit

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



# 8. Issue Permit

## Application

**#1 Application for Project**  
**DFCM Project Manager**  
Completes and submits New Application Form

**#2 Application Reviewed**  
**DFCM Administrator**  
Checks application and makes sure users are properly assigned

## First Submittal

**#3 First Submittal**  
**Architect/Engineer**  
Uploads the First Submittal, lists Deferred Items, completes the Special Inspection Form, and lists Structural Observations

**#4 First Submittal Review**  
**DFCM Project Manager**  
Ensures the First Submittal is correct, making changes if needed

**#5 Plan Reviewers Assigned**  
**DFCM Building Official**

## Plan Review

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

**#7 Resubmittal**  
**Architect/Engineer**  
Should corrections be required, the Architect is notified and asked to upload a new submittal

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



# 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 ▾	<input type="button" value="Choose File"/> No file chosen	<input type="text"/>	

## UPLOAD OPTIONS

Related to Review:  ▾

*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

# 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	<a href="#">View</a> <a href="#">Unlock</a>
1	Complete	05-09-14	6	Zach Freitag	All Review Types	<a href="#">View</a> <a href="#">Unlock</a>

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

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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

### Complete Submittal: Permitted Documents

UPLOAD

2<sup>nd</sup>

+ Add More Files

Type	File	Description	Remove
Plans	<input type="button" value="Choose File"/> Permitted Set.pdf	Permitted Set.pdf	

### UPLOAD OPTIONS

Complete Submittal:  Yes

3<sup>rd</sup>

*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.

4<sup>th</sup>

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

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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

## 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**  
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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.

**DFCMv2** *1st*

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

Report Menu Print Download filter PRINT

PROJECT #	NAME	STATUS	LAST INSP.	INSPECTORS
<i>2nd</i> 14505757	Jacob Test	Permits Issued		



# 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.).

14505757 - Jacob Test


PRINT 

Application


 Submittals


 Deferred Submittals


 Special Inspections


 Structural Observations

 Add/Edit Users

 Inspections

 C.O./Final

 Code Inspection Reports

 Special Inspection Reports

 Distribution List

*1st*

## Distribution List

E-mail addresses specified here will receive an automatic email whenever an Inspection Report is uploaded. Additionally, the reports will be attached to the email and logging into the website will not be required to access the reports.

**One e-mail address per line.**

zach@kimballeng.com  
chris@kimballeng.com  
sally@construction.com  
andy@inspections.com  
spencer@projectmanagement.com

*2nd*

*3rd*

Save



# 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.

14505757 - Jacob Test

PRINT 

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

 Code Inspection Reports  Special Inspection Reports  Distribution List

*1st*

## Code Inspections

*2nd*

### UPLOAD REPORT

Type	File	Description	Remove
Code Insp. Report ▼	<input type="button" value="Choose File"/> Code Insp...port.pdf	<input type="text" value="Code Inspection Report.pdf"/>	

Uploaded reports will be made available to all privileged users marked to 'View Inspections'.  
E-mail recipients on the Distribution List will receive an e-mail with reports attached.

*3rd*

### REPORTS

Date Range:

File Type	Date	Description	Uploaded By	Options
-----------	------	-------------	-------------	---------

# Perform Inspections

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




The screenshot displays the DFCM v2 web application interface. At the top left, the text "DFCM v2" is visible. To the right is the official seal of the State of Utah and the text "Division of Facilities Construction and Management" and "State of Utah Department of Administrative Service". Below this, the user's name "Zach Freitag" and title "DFCM System Administrator" are shown. A navigation bar contains tabs for "Permit Requests", "Inspections", "Projects", "Agencies", "Users", "E-mails", "Profile", "Log Out", and "Help". The main content area shows a header "14505757 - Jacob Test" with a "PRINT" icon. Below the header is a row of tabs: "Application", "Submittals", "Deferred Submittals", "Special Inspections", "Structural Observations", "Add/Edit Users", "Inspections", and "C.O./Final". A second row of tabs includes "Code Inspection Reports", "Special Inspection Reports" (highlighted with a red box), and "Distribution List". The section is titled "Code Inspections".



# 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”.

14505757 - Jacob Test PRINT 

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

Code Inspection Reports Special Inspection Reports Distribution List



### Code Inspections *1<sup>st</sup>*

#### UPLOAD REPORT

Type	File	Description	Remove
<div style="border: 2px solid red; padding: 5px;"><ul style="list-style-type: none"><li>Code Insp. Final Report</li><li>Code Insp. Report</li><li style="background-color: #e0e0e0;">Code Insp. Final Report</li><li>Certificate of Fire Clearance</li><li>State Elevator Insp. Approval</li><li>State Boiler Insp. Approval</li><li>Disinfection Report</li><li>Fabricator Cert. of Compliance</li><li>NFRC Certificate</li><li>Final Rep. Mech. Eng. (Smoke)</li><li>Final Rep. Sp. Insp. (Smoke)</li></ul></div> <div style="margin-left: 20px;"><i>2<sup>nd</sup> Notice the 'Final' report options</i></div>	<input type="button" value="Choose File"/> No file chosen	<input type="text"/>	

Uploaded reports will be made available to all privileged users marked to 'View Inspections'.  
E-mail recipients on the Distribution List will receive an e-mail with reports attached.

+ Add More Files Upload Files *3<sup>rd</sup>*

File Type	Date	Description	Uploaded By	Options
Code Insp. Final Report	05-09-14	Code Inspection Report.pdf	Zach Freitag	Open Delete 
Code Insp. Report	05-09-14	Code Inspection Report.pdf	Zach Freitag	Open Delete 

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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 uploaded, the Building Official uploads the Permitted Docs

## Inspections & CO

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

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

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



# Issue Final or C.O.

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

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



# Issue Final or C.O.

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

**C.O.** Final T.C.O.  
*2nd*

*1st*

## 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

*3rd*

### CERTIFICATE

Type	File	Description	Remove
Certificate of Occupancy	<input type="button" value="Choose File"/> No file chosen	<input type="text"/>	

# Issue Final or C.O.

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



The screenshot displays the DFCM v2 web application interface. At the top left, the text "DFCM v2" is shown. To the right is the official seal of the State of Utah, with the text "Division of Facilities Constructions and Management" and "State of Utah Department of Administrative service" below it. Further right, the name "Zach Freitag" is listed as the "DFCM System Administrator". A navigation bar contains several menu items: "Permit Requests", "Inspections", "Projects", "Agencies", "Users", "E-mails", "Profile", "Log Out", and "Help". Below the navigation bar, a "Success" message is displayed, stating "Your upload and/or setting submission was successful. [Click here](#) to continue." To the right of this message is a "PRINT" button with a printer icon. Below the success message, it says "The following items were uploaded:" followed by a list item "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

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Plan Review begins:  
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**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.

**DFCM v2**

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

Login **Help**

**THE GREAT SEAL OF THE STATE OF UTAH**  
1896  
Division of  
Facilities Construction  
& Management

**Login**

[Sign Up](#)

E-Mail

Password

**Login**

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

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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.”

**DFCM v2** Division of Facilities Construction 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

### Change Account Information

You can update your basic account information below.

**BASIC INFORMATION**

E-mail: zach@kimballeng.com  
First Name: Zach  
Last Name: Freitag  
Phone Number: (801) 807-8423  
Default Report: My Projects

**CHANGE PASSWORD**

This can be left blank if you don't want to change it.

Current Password:   
New Password:   
Repeat New Password:

**Update**

Need help? Please contact Gail Youngblood at (801) 538-3708 or [gyoungblood@utah.gov](mailto:gyoungblood@utah.gov). DFCM v2.1.4 ©2012 West Coast Code Consultants, Inc.



# D. See All Projects

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

**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

Report Menu | Print | Download

filter PRINT

STATUS	REVIEWERS/INSPECTORS	PROJ. MANAGERS	DELETE
Awaiting 1st			<a href="#">delete</a>
Permits Issued	F. Christensen, C. Kimball	Brian Bales	<a href="#">delete</a>
Application Incomplete			<a href="#">delete</a>
Permits Issued	F. Christensen, C. Kimball		<a href="#">delete</a>
Permits Issued	F. Christensen		<a href="#">delete</a>
Application Incomplete			<a href="#">delete</a>

# 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.



The screenshot displays the DFCM v2 web application interface. At the top, the header includes the Utah State Seal, the text "Division of Facilities Constructions and Management State of Utah Department of Administrative service", and the name "Zach Freitag DFCM System Administrator". Below the header is a navigation menu with tabs for "Permit Requests", "Inspections", "Projects", "Agencies", "Users", "E-mails", "Profile", "Log Out", and "Help". The "Projects" tab is selected. The main content area shows a table of projects with columns for "PROJECT #", "NAME", "STATUS", "REVIEWERS/INSPECTORS", "PROJ. MANAGERS", and "DELETE". The "STATUS" column is highlighted with a red box. The table contains 10 rows of project data.

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



# 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.

The screenshot displays the DFCM v2 web application interface. At the top, the logo for the State of Utah is visible, along with the text "Division of Facilities Constructions and Management" and "State of Utah Department of Administrative service". The user is identified as "Zach Freitag DFCM System Administrator".

The main navigation bar includes "Permit Requests", "Inspections", "Projects" (highlighted with a red box and labeled "1st"), "Agencies", "Users", "E-mails", "Profile", "Log Out", and "Help".

Below the navigation bar, the "Report Menu" button is highlighted with a red box and labeled "2nd". To its right are "Print" and "Download" buttons. A "filter" input field is also present, with a "PRINT" button to its right.

The "Report Menu" dropdown is open, showing a list of report types. The "Completed Projects" option is highlighted with a blue bar and labeled "3rd". Other options include "Inspections By Role", "-Admin-", "All Projects", "All Inspections", and "Submittals Due".

The main content area displays a table with the following data:

STATUS	DATE	EXPIRES
CO Issued	00/00/0000	00/00/0000
Final Issued	11/27/2013	00/00/0000
TCO Issued	11/27/2013	11/15/2013
Final Issued	12/06/2013	
CO Issued	05/09/2014	



# 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*

**DFCM v2** Division of Facilities Construction 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

**Project Description** [Zip and Download \(Custom\)](#)

---

**BASIC INFORMATION**

Project Number:	14505757	Address:	2400 Camino Ramon
Project Name:	Jacob Test		
Valuation:	\$10,000,000		San Ramon, CA 55555
Property #:	2425235		
Agency:	University Of Utah		



# 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.

**DFCM v2** Division of Facilities Construction 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

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

Submittals:	<input type="checkbox"/>	<i>1st</i>	All files uploaded for all submittals including permitted docs and response letters.
Comments:	<input type="checkbox"/>		All files uploaded for reviewer comments.
Inspections:	<input type="checkbox"/>		All files uploaded for code and special inspection reports.
Perm. Docs/Resp.Letters:	<input type="checkbox"/>		All files uploaded for permitted docs and response letters only.
Struct. Obs.:	<input type="checkbox"/>		All files uploaded for structural observation reports.
C.O./Final:	<input type="checkbox"/>		C.O./T.C.O./Final
All	<input type="checkbox"/>		All of the above.

*2nd*

Download As Zip

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# 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.

<a href="#">Report Menu</a>	<a href="#">Print</a>	<a href="#">Download</a>	<a href="#">1/1</a>		<input type="text" value="highway"/>	<a href="#">PRINT</a>
PROJECT #	NAME	STATUS	REVIEWERS/INSPECTORS	PROJ. MANAGERS	DELETE	
<a href="#">12216550</a>	Highway Patrol Ballistic Window Replacement	Final Issued	F. Christensen		<a href="#">delete</a>	

