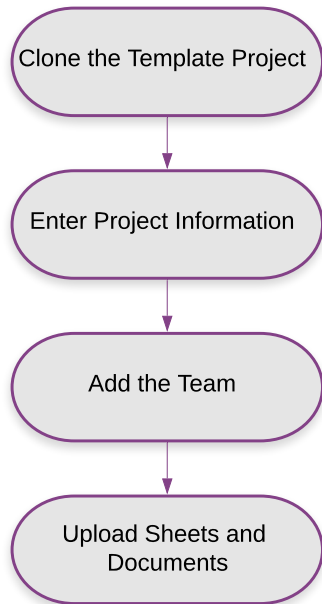
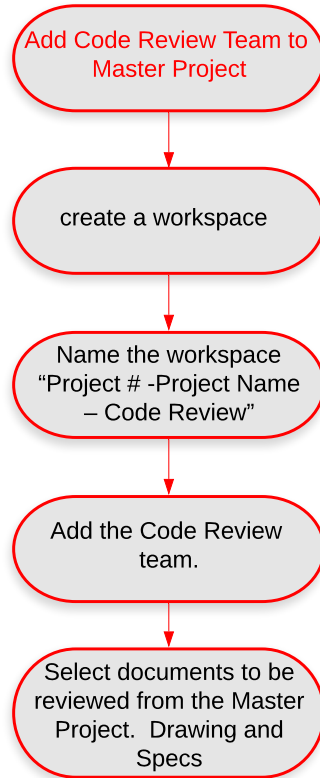


## CREATE YOUR MASTER PROJECT

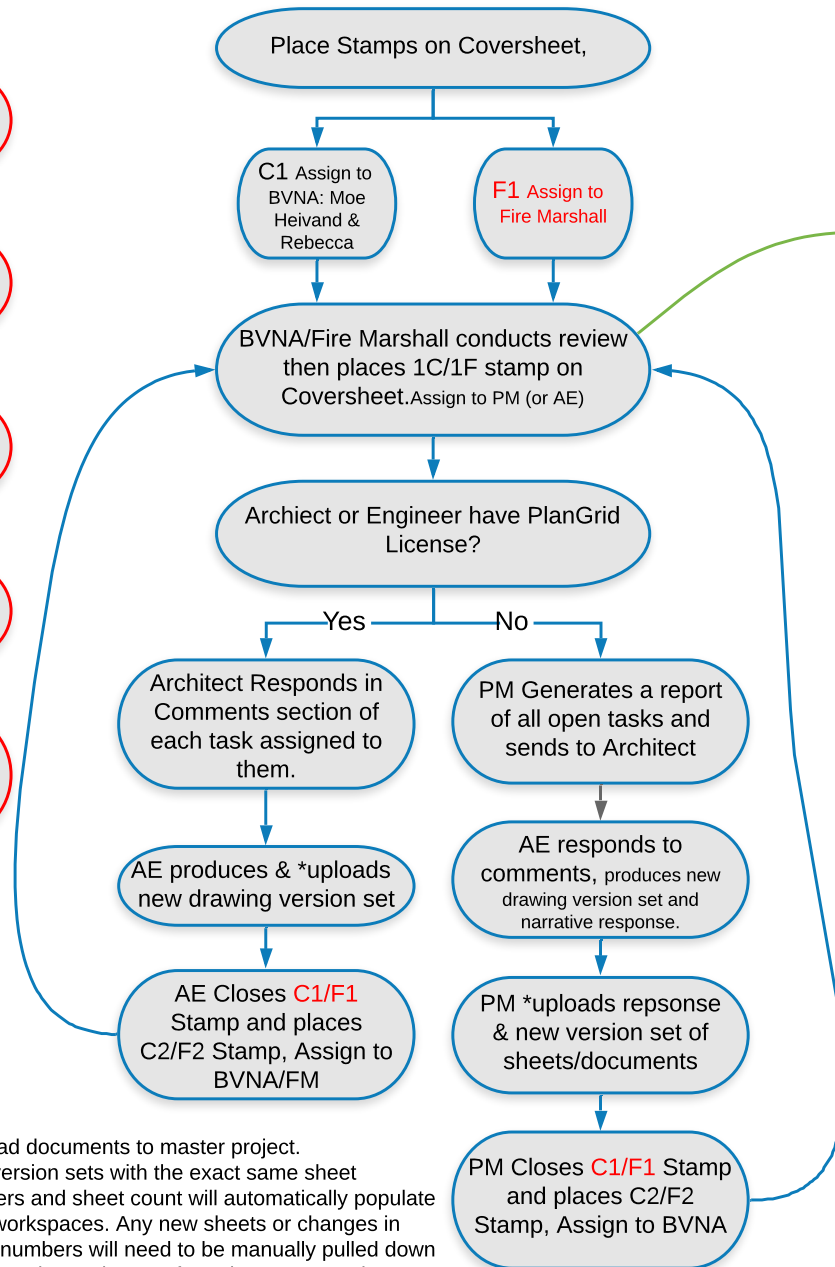


## CREATE YOUR WORKSPACE FOR CODE REVIEW



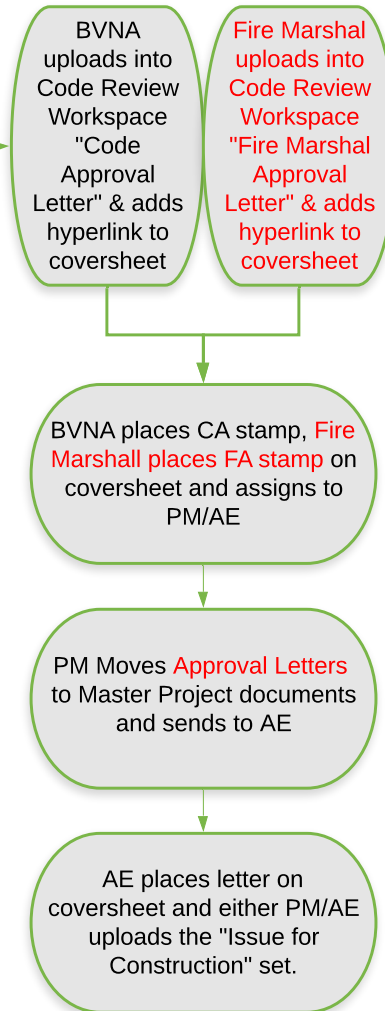
## CODE REVIEW CYCLE

Code review cycle starts with **C1** (initiate code review) and ends with **1C** (BVNA review complete, initiate response to code review). C1 – 1C, C2 – 2C, C3 – 3C etc. Fire Marshal review follows the same process with F1 -1F, F2- 2F etc.



## CODE APPROVAL

No more comments, all issues resolved?



## UNIVERSITY OF UTAH PLANGRID & CODE REVIEW

Updated July 1st 2020  
University of Utah  
Planning Design & Construction

\* upload documents to master project.  
New version sets with the exact same sheet numbers and sheet count will automatically populate in all workspaces. Any new sheets or changes in sheet numbers will need to be manually pulled down by PM to the workspace from the master project. See Quick Start Guide on how to do this.

# **CREATE A PLANGRID PROJECT & CODE REVIEW**

## **UNIVERSITY OF UTAH**

SEE PDC WEBSITE FOR MOST UP-TO-DATE DOCUMENT AND INSTRUCTIONS

<https://pdc.utah.edu/homepage/permits-and-codes/code-review/>

The purpose of **this training document** is to identify the process for Code Review Process at the University of Utah (U of U) utilizing PlanGrid. **Please reference the *PlanGrid Quick Start Guide (PGSQG)* – University of Utah Nov 2019 for step by step guidance. You will find this guide in plan grid on your project list.**

### **CREATE YOUR PLANGRID PROJECT**

1. **Clone the “University of Utah – Template Project”**
  - a. Find and open the “University of Utah – Template Project,” under “View Full Project List”
  - b. Go to “Settings,”
  - c. click blue hyper link “Clone Project”
  - d. Rename the clone: “Project # - Project Name – Building #”
  - e. Under “Cloned Project Options,” check all boxed options, EXCEPT DO NOT SELECT “Team” and “Sheets”
  - f. (10 minute delay) Then find your cloned project in the project list and open.
2. **Enter Project Information:**
  - a. Go to settings. Click “Edit Info”
  - b. Fill in all correct project information about your project.
  - c. NOTE: Type in AE’s (or PM’s) Name in “Client/Owner” Box,” (This tells BVNA who initiated the code review.)
  - d. You have now created your Master Project.
3. **Add your Team:**
  - a. In your new Master Project, click “Team” on the left side of the screen. **Add anyone to your Team you deem necessary, such as your director, architect, and contractor. Consider permission levels carefully. (Ref. pg. G4.12 in the PGSQG)**
  - b. **Add Code Review Team ONLY if you are ready for Code Review now:**
    - i. Add “Admin” Team members:  
AE if they possess a PG license  
Moe.Heivand@bureauveritas.com  
Rebecca.Wisniewski@bureauveritas.com
    - ii. Add “Power Collaborator” Team members:  
Bijan.Shakiba@bureauveritas.com – Civil  
Syed.Aleem@bureauveritas.com – Structural & Architectural  
William.Bonn@hsc.utah.edu – HSC  
Clint.Haymond@**oehs**.utah.com – Main Campus Fire Marshall
4. **Upload Files:**
  - i. Upload drawings into the Master Project by clicking “+ Upload Sheets”. (All drawings must be uploaded as pdf file type.) **(Ref. pg. G4.05 in the PGSQG)**
    - **Note about sheet numbers: In order for the layering effect of each version of drawings to work properly, please ensure that the numbers are correct when entering them into PlanGrid and that your architect maintains consistent numbering in future sets. (Ref. pg. G4.09, in the PGSQG)**
  - ii. Upload Specifications (pdf’s) under “Documents”, not sheets.


## CREATE A WORKSPACE FOR CODE REVIEW (AND INSPECTIONS)

1. **If not already done so, add Code Review team to the Master Project.** Only do this when you are ready to start code review. See 3(B) above.
2. **Create Code Review Workspace.**
  - a. Go to “View Full Project List” Find your newly created Master Project. Under your new project, click blue hyperlink “Create a workspace”
3. **Name the workspace** “Project # - Project Name – Code Review” Click green NEXT button.
4. **Add the Code Review team.** Select those who should be involved in a code review. Select their names and click NEXT.
5. **Select documents to be reviewed.** Add all sheets to be reviewed from the Master Project into the code review workspace.
  - a. Also add Specifications and other important **documents** to the Code Review Workspace.
6. **Go to Teams and update permission levels** per list in “**CREATE YOUR PLANGRID PROJECT**” above.
7. **Possible glitch:** Go to Tasks, click “stamps” header, and **check that the stamps cloned from the template** file correctly. (The first stamp should be “33”)
  - a. If not, select all stamps, delete. Click “import stamps” button, select the “University of Utah – Template Project”, select all, click “Import Stamps”.

(Follow same procedure for creating a workspace for inspections)

## CODE REVIEW CYCLE

Code review cycle **starts with C1** (initiate code review) and **ends with 1C** (BVNA review complete, initiate response to code review). C1 – 1C, C2 – 2C, C3 – 3C etc. Fire Marshal Review follows same pattern. F1- 1F, F2 -2F etc.

1. **PUBLISH CODE REVIEW INITIATING STAMP (C1, C2, C3, F1, F2)**
  - a. Go to your project’s coversheet under “Sheets” in the Code Review Workspace.
  - b. Click the “Add a Stamp” Button . Place a **C1** task stamp on the cover sheet and assign the task to Moe Heivand and Rebecca Wisniewski. **F1 stamp assigned to appropriate fire marshal.**
  - c. **Do not enter the start date or due date.**
    - i. (Once BVNA receives the C1 task stamp, BVNA will enter the start and due dates for a 5 day turnaround. BVNA can also add the BVNA Group as a watcher to the C1 task stamp.)
  - d. **Publish task stamp so all team members can see it.**
2. **BVNA & FM CONDUCT CODE REVIEW:** BVNA/FM, using established, standardized U of U Task Stamps (which the PM or AE cloned to the Master Project previously) based on Construction Specifications Institute (CSI) division standards, will place task stamps/code review comments on the project sheets. (Ref. pg. G2.15, in the PGQSG).
  - a. **If there are code comments:** Once code review cycle is complete by all parties, reviewers will add and publish a **1C or 1F stamp to the coversheet** (or 2C, 3C, **2F**) indicating that the Architect can now start their response. The stamp will be assigned to the Owner/Client of the plangrid project (PM or AE).
  - b. **If there are no code comments** Jump to Code Approval below.
3. **DESIGN TEAM RESPONDS TO CODE COMMENTS:**
  - a. **If your AE does not have a PlanGrid license:**
    - i. **The PM create a task report and email to the AE.** (Select ALL “**OPEN**” “Tasks” and then click green button “Export (Selected)”
    - ii. Click “Reports” use save or share function to send to AE. **DO NOT change status, un-publish or reassign individual issue task stamps.** (Ref. pg. G4.15, in the PGQSG).
    - iii. **AE responds to comments**, produces new drawing version set and/or narrative response.
    - iv. **Upload response to PlanGrid.**
      - **Uploads the new sheets to the Master project.**
        - Issuance date will be date received.
        - Version set name will be “Code Review 2.”

- **\*\*New version sets with the exact same sheet numbers and sheet count will automatically populate in all workspaces. Any new sheets or changes in sheet numbers will need to be manually pulled down by PM to the workspace from the master project. See Quick Start Guide on how to do this.**
  - **Upload any additional non-sheet documents** from AE to the Documents section. (Narrative code response, etc.)
    - Hyperlink these documents to the cover page and publish to the project. *(Ref. pg. G2.13 in PGQSG)*
  - **PM will change status of C1 stamp to “closed.” DO NOT un-publish, change status or reassign individual issue task stamps.**
  - **Start Code Review Cycle again by placing a C2 Stamp on the coversheet. See step 1 (PUBLISH CODE REVIEW INITIATING STAMP) above.**
- v. **BVNA/FM closes 1C stamp and the other task stamps if they were addressed by AE.** If they were not addressed properly, BVNA/FM will leave those task stamps open and add any necessary comments to the AE.
- Dialoged continues between AE and BVNA until resolved and closed.
- b. **If your AE does have a PlanGrid license, follow the process below:**
- i. **PM will assign all tasks to the AE if not already done so by BVNA. DO NOT change status or un-publish individual issue task stamps. Keep the watchers the same.**
- This can be done on [www.plangrid.com](http://www.plangrid.com) by selecting all Open tasks, clicking “Edit”, and mass assigning to the AE.
  - **AE responds to all code stamps in Task’s “comment” section. TIP: press ENTER on keyboard when you are ready to post your comment. DO NOT un-publish, change status or reassign individual issue task stamps after you have made response in comments.**
  - **AE also develops a narrative response for all BNVA comments.**
- ii. **AE revises drawings and documents as needed.**
- iii. **Upload response to PlanGrid.**
- **Uploads the new sheets to the Master project.**
    - Issuance date will be date received.
    - Version set name will be “Code Review 2.”
    - **\*\*New version sets with the exact same sheet numbers and sheet count will automatically populate in all workspaces. Any new sheets or changes in sheet numbers will need to be manually pulled down by PM to the workspace from the master project. See Quick Start Guide on how to do this.**
  - **Upload any additional non-sheet documents & narrative code comment response** from AE to the Documents section. (Architects should not use narrative response, because they will be utilizing the comment section of the task stamps.)
    - Hyperlink these documents to the cover page and publish to the project. *(Ref. pg. G2.13 in PGQSG)*.
  - **PM will change status of C1 stamp to “closed.” DO NOT un-publish, change status or reassign individual issue task stamps.**
  - **Start Code Review Cycle again with C2 Stamp. See step 1 (PUBLISH CODE REVIEW INITIATING STAMP) above.**
- iv. **BVNA/FM closes 1C stamp and the other task stamps if they were addressed by AE.** If they were not addressed properly, BVNA/FM will leave those task stamps open and add any necessary comments to the AE.
- Dialoged continues between AE and BVNA in comments section of tasks until resolved and closed.

## CODE APPROVAL

Once all task stamps are closed, BVNA will place a Code Approved (CA), Fire Marshal will place a Fire Marshal Approved (FA) task stamp on the cover sheet and assign to the PM, providing an email notice that the project has been approved. BVNA/Fire Marshal will also hyperlink a code/fire approval document adjacent to the CA/FA task stamp. (Ref. pg. G2.13, PGQSG).

1. The Code Approval letter in “documents” will constitute formal code approval.
2. The PM must:
  - a. Upload this letter to the documents section of the Master project.
  - b. Deliver Code Approval letter to Architect.
3. Architect to place Code Approval Letter on the coversheet of the “Issue for Construction” drawings and send to PM.
  - a. PM to Upload the “Issue for Construction” drawings to the Master project
  - b. Hyperlink the letter to the cover sheet of the “Issue of Construction” drawings in the Master Project and **publish to the project.**