

The logo for the Houston Permitting eSERVICES center. It features the word "HOUSTON" in a grey sans-serif font, "PERMITTING" in a bold red sans-serif font, and "center" in a smaller grey sans-serif font. Below "PERMITTING" is the word "eSERVICES" in a red sans-serif font. To the right of the text is a graphic consisting of several overlapping squares in shades of grey, red, and brown.

HOUSTON
PERMITTING
center
eSERVICES

Office of the City Engineer Plan Review

Step-by-step user guide to electronic plan
review process

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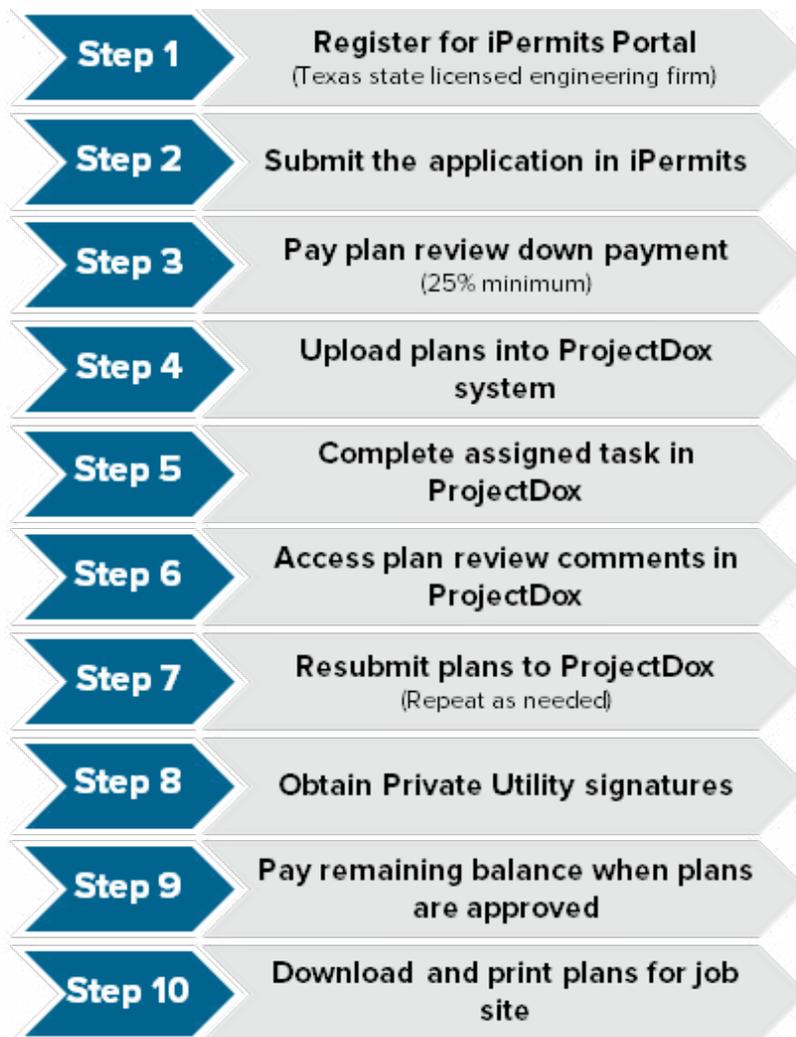
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Overview

ELECTRONIC PLAN REVIEW PROCESS

The purpose of this document is to provide general information on the process for registering the Engineering firm with the iPermits Customer Portal for Office of City Engineer Plan Review, and the electronic plan review system called ProjectDox.

The electronic plan review process is broken down into 10 key steps. The process utilizes two systems: iPermits and ProjectDox. The iPermits Customer Portal is used to submit applications and to make payments. ProjectDox is use to upload drawings, receive comments, and receive approvals.



iPermits Registration

STEP 1: REGISTER AN ENGINEERING FIRM

Before a plan review application may be submitted to the Office of the City Engineer, an Engineering Firm must have a company profile in iPermits. To create a company profile:

1. Register an Engineering Firm
2. Create a Security Administrator User Profile

3. Register Additional Firm Users
4. Activate Newly Registered Firm Users

If the engineering firm is already registered in iPermits, please skip to *Step 3* on page 7.



From the [iPermits login](#) page, select the link **Click here to Register** next to *First-time user?*

On the next screen, select **No** to the question, *Are you associated with an electrical, plumbing, or mechanical trade contractor?*

Select **Yes** to the question, *Are you associated with a Texas state licensed engineering firm?* Enter your Texas State registered **Engineering Firm License Number** and click the **Submit** button.



If your engineering firm license number is not in the iPermits database, contact Yolanda Brown-Kingsberry at yolanda.brown@houstontx.gov.

iPermits Registration

STEP 2: CREATING A SECURITY ADMINISTRATOR USER PROFILE

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Public Works and Engineering > Planning and Development Services Division [Contractor Menu](#)

Create an Engineering Firm related User Profile

Please read the following information before proceeding

- Only State Licensed Engineering Firm Licensees should complete this page.
- Fields marked with * are required.
- Within iPermits, the primary use of this license type is to prepare and submit Office of the City Engineer plan review application requests. If you are a Mechanical contractor and trying to establish a web presents to purchase mechanical permits please return to the previous web page and select the 'trade license' related option. If you need further assistance please contact the office of the city engineer.

Engineering Firm Name Information

License No: License Type: ENG

Entity Name Type: Individual Corporation or Firm

Corporation or Firm: ABC Engineering Firm

House # Fraction Pre-Dir Street Name Type Space

Mailing Address: 1234 Main Street

City: DAYTON State: Zip:

Firm Name: ABC Engineering

Phone Number: 8323949000 Phone Number: numeric digits only

Email Address: houston.permittingcenter@houston.tx.gov

License Information

The Engineering firm number shown above is not currently registered in the City of Houston's iPermits database. If you are not the Licensee, please consult with your management team and obtain their approval before proceeding.

By default you will be added as a security administrator for . By proceeding you are acknowledging that you are an authorized administrator.

iPermits PIN: ***** PIN Confirmation: *****

User Information

User ID: *userid Password: * ***** Confirm: * *****

Email Address: * houston.permittingcenter@houston.tx.gov

First Name: * John Middle: Last: * Doe

Mailing Address: * 1002 Washington Avenue

City: * Houston State: * TX Zip: * 77002

Company Name: * Houston Permitting Center

Phone Number: * 8323949000 Fax Number:

I hereby affirm the following declaration:

I have personal knowledge of the statements made in the application. None of the statements are misleading or false. I acknowledge that issuance of the account does not excuse or approve any violation of city, state, or federal laws or regulations. To the extent that this declaration is made on behalf of a corporation or any other legal entity or persons, I certify that I have fully advised them of the contents of the application and this declaration and that I am authorized to execute this declaration.

I declare under penalty of perjury that the foregoing is true and correct.

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Complete any blank fields in the *Engineering Firm Name Information* section.

Note: the first person to register a firm will become the security administrator and sets the master PIN.

Enter any 6-digit number in the **iPermits PIN** field and re-enter it to confirm.

Enter a **User ID** (*max. 8 characters*) and **Password** (*6-8 characters*) of your choosing and an email address. These will become your login credentials for iPermits. Complete the remaining required fields.

Check the disclaimer box and click **Submit Add** to complete registration.

iPermits Registration

STEP 3: CREATING ADDITIONAL USERS FOR A REGISTERED FIRM

The screenshot shows the 'Create an Engineering Firm related User Profile' page on the City of Houston website. The page includes a navigation menu, a breadcrumb trail, and a title. A yellow warning box contains instructions for users. The form is divided into several sections: 'Engineering Firm Name Information', 'License Information', and 'User Information'. The 'Engineering Firm Name Information' section includes fields for License No., License Type (ENG), Entity Name Type (Individual or Corporation or Firm), Corporation or Firm name (TEST ENGINEER), Mailing Address (1002 WASHINGTON Avenue, HOUSTON, TX 77002), Firm Name (ILMS TEST), Phone Number, and Email Address. The 'License Information' section includes a field for iPermits PIN and a checked 'PIN Override' option. The 'User Information' section includes a 'Security Level' selection (The user being added is a staff member), fields for User ID (katie), Password, Confirm, Email Address (houston.permittingcenter@houstontx.gov), First Name (Katie), Middle, Last (Doe), Mailing Address (1002 Washington Ave, Houston, TX 77002), Company Name (Houston Permitting Center), and Phone Number (8323949000). A declaration section follows, with a checked box for 'I hereby affirm the following declaration:' and a text area for the declaration. At the bottom, there are 'Submit Add' and 'Clear' buttons, and a footer with navigation links and copyright information.

Create an Engineering Firm related User Profile
Please read the following information before proceeding

- Only State Licensed Engineering Firm Licensees should complete this page.
- Fields marked with "*" are required.
- Within iPermits, the primary use of this license type is to prepare and submit Office of the City Engineer plan review application requests. If you are a Mechanical contractor and trying to establish a web presents to purchase mechanical permits please return to the previous web page and select the 'trade license' related option. If you need further assistance please contact the office of the city engineer.

Engineering Firm Name Information

License No: [] License Type: ENG

Entity Name Type: Individual Corporation or Firm

Corporation or Firm: TEST ENGINEER

Mailing Address: House # 1002 Fraction [] Pre-Dir [] Street Name WASHINGTON Type Avenue Space []

City: HOUSTON State: TX Zip: 77002

Firm Name: ILMS TEST

Phone Number: [] Phone Number: [] numeric digits only

Email Address: ke*****@robustsystems.com

License Information

iPermits PIN [] If you do not know the Pin number you may select the following option:

PIN Override I do not know the PIN. Please proceed with the registration but email the company's security administrator and request he/she activate this user profile.

User Information

Security Level: This is my license. Do not restrict user access.
 The user being added is a staff member. Restrict his/her web portal access rights to my license

User ID: katie Password: ***** Confirm: *****

Email Address: houston.permittingcenter@houstontx.gov

First Name: Katie Middle: [] Last: Doe

Mailing Address: 1002 Washington Ave

City: Houston State: TX Zip: 77002

Company Name: Houston Permitting Center

Phone Number: 8323949000 Fax Number: []

I hereby affirm the following declaration:

I have personal knowledge of the statements made in the application. None of the statements are misleading or false. I acknowledge that issuance of the account does not excuse or approve any violation of city, state, or federal laws or regulations. To the extent that this declaration is made on behalf of a corporation or any other legal entity or persons, I certify that I have fully advised them of the contents of the application and this declaration and that I am authorized to execute this declaration.

I declare under penalty of perjury that the foregoing is true and correct.

Submit Add

Clear

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From the [iPermits login](#) page, select the link **Click here to Register** and enter the Firm License number (Refer to Step 1 for detailed instructions).

Enter the **iPermits PIN** if it was given to you. Otherwise check the box for **PIN Override**.

Choose the appropriate Security Level. *Note: users cannot select "This is my license" level without the iPermits PIN.*

Enter a **User ID** (max. 8 characters) and **Password** (between 6-8 characters) of your choosing and an email address. These will become your login credentials for iPermits. Complete the remaining required fields.

Check the disclaimer box and click **Submit Add** button to create a user profile. If *PIN Override* was selected, the Security administrator will be notified of the new user profile pending activation.

iPermits Registration

STEP 4: ACTIVATING A NEWLY REGISTERED USER

Public Works and Engineering > Planning and Development Services Division

iPermits Online Service Menu

User Profile: Building Permit Applications
Office of the City Engineer Plan Review Application

You are: **ENGINE01**

[Edit User Profile](#)

[User Document Catalog](#)

Corporate User Roster

[Licensees Associate with your User-ID](#)

[Users Associated with a License](#)

[Companies Associated with a License](#)

Select the desired Customer

- Use this entry for sales-orders that do not require a License

Purchase a Trade Permit

Review Your Recent Shopping Cart Entries

User Project Management - List Maintenance

Pay for a Houston Permitting Center shopping cart

Make an Advanced Payment Account Deposit

Enter the Desired Date Range (blank defaults to the last year)

From: 11/13/2014 To: 11/13/2015

From the Security Administrator's iPermits account and select the link **Corporate User Roster**, located on the left side of the *Online Service Menu*.

The *iPermits Corporate User Management* screen displays all users associated with an Engineering Firm. Click on the **User ID** with the *Pending Activation* status.

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Public Works and Engineering > Planning and Development Services Division [Contractor Menu](#)

iPermits Corporate User Management

This page allows you to manage the iPermit Users associated with your company

Company: TEST ENGINEER

User-ID	User Name	Branch	Security Administrator
ENGINE01	IPERIMITS ENGINEER TEST	MAIN	Yes
ENGINE02	HOOPER ROBERT F	MAIN	
ENGINE03	ADMINISTRATOR TEST	MAIN	
KATIE	KATRINA (Pending Activation)	MAIN	

Change the **User Status** to *Active* in the drop-down menu and select the **Update Profile** button. The user can now login to iPermits and start submitting applications for plan review.



To remove a user from the company roster, change status to *Inactive* and uncheck *Allow User Access* to the firm's license(s).

Corporate Information

Company ID:

Company Name: TEST ENGINEER

Company Address: 1002 WASHINGTON AVE MAIN

City: HOUSTON State: TX Zip: 77002

Main Phone Number: 7134-

Branch Name: MAIN

User Information

User ID: KATIE User Status: **Active** Corporate Security Administrator

Email Address: houston.permittingcenter@houstontx.gov

First Name: KATIE Middle: Last: DOE

Phone Number: 8323949000 Fax Number:

Mailing Address: 1002 WASHINGTON AVE

City: HOUSTON State: TX Zip: 77002

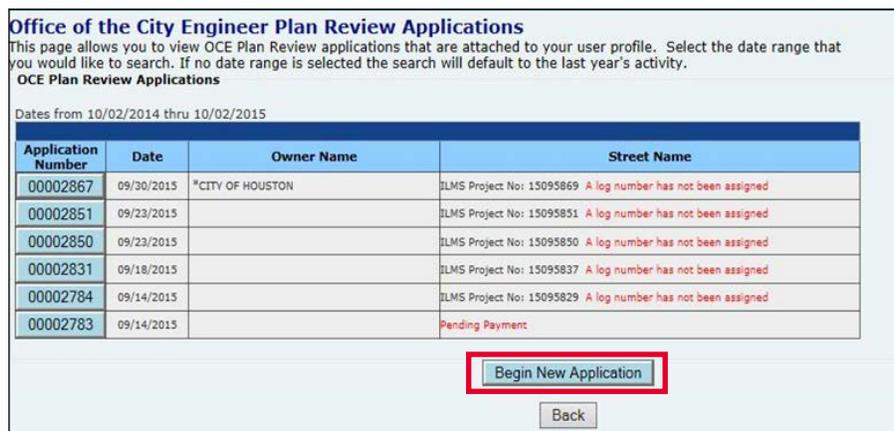
License Number	License Type	Licensee Name	License Status	Allow User Access
12345678	ENG	TEST ENGINEER	License in good standing	<input checked="" type="checkbox"/> <input type="checkbox"/>

Application Process

INITIATING A NEW APPLICATION



Log into your iPermits portal account. Under the iPermits Online Service Menu, click on the **Office of the City Engineer Plan Review Application** button as illustrated.



To submit a new application, click on the **Begin New Application** button.



iPermits system will display the applications you have submitted during the last year, with status comments in red.

Application Process

COMPLETE A PLAN REVIEW APPLICATION

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Public Works and Engineering > Planning and Development Services Division [Contractor Menu](#)

Office of the City Engineer Application for Plan Review

Required under the Authority of the City of Houston, Ordinance No. 83-650
Please Note: Submittal of false information will result in invalidation of the application.

Please read the following information before proceeding

- Fields marked with "*" are required.
- Any Application submitted by anyone other than the property owner must be accompanied by the Application Authorization Form that designates the applicant as an "authorized representative".
- The specified number of sheets must be accurate or the application may not be accepted
- Electronic Plan submission is unavailable at this time. At present you must submit hard copy plans and supporting documents to the Office of the City Engineer; 2nd floor Houston Permitting center.

Application

Please Describe the Proposed Development*:

Number of Sheets*: Manual/Hard Copy Plan Submission Electronic/ProjectDox Plan Submission

Key Map*: In FloodZone Trees In ROW Water Facility Wastewater Facility

County*: Please Select Inside City Limits Outside City Limits

Applicant/Engineer Information

Select Applicant*: 12345678ENG - TEST ENGINEER

Mailing Address:

City: State: Zip:

Contact*:

Phone Number*: Phone Number: numeric digits only

Email Address*:

Engineer of Record*:

Phone Number*: numeric digits only

Email Address*:

Owner Information

Entity Name Type: Individual Corporation or Firm Applicant is Owner

Last, First Middle:

Mailing Address: Name: Unit:

City: State: Zip:

Contact:

Phone Number: Phone Number: numeric digits only

Email Address:

Enter the required information and when completed, click the **Save & Continue** button.

- Enter the description from the cover sheet into the "Please describe the Proposed Development" box.
- Select your submission method. *Note: you cannot switch between methods for a project.*
- If the project is in or partially in the flood zone, check the box for **In Flood Zone**.
- If the project is inside COH city limits and there are trees in right-of-way, check the box for **Trees in ROW** to include Urban Forestry into the plan review.
- If the project has a water plant, water wells or contract water, check the box for **Water Facility**.
- If the project includes a force main, lift station or reclaimed water line, check the box for **Wastewater Facility**.

If you submit any incorrect information, it can result in delay of processing and/or rejection.

Application Process

CHOOSE PAYMENT AMOUNT

The page will refresh and display information about the application fee. A minimum of 25% of the plan review fee plus the administration fee is due upon finalizing the application.

Choose a payment option to generate a sales order and click on the **Finalize Application** button.

Application Fee

Please Note: As of January 1st 2014, the Office of the City Engineer plan check fee as been increased from \$76.12 per sheet to \$77.06 per sheet. Based on the above mentioned, 2 sheets, this application's plan check fee is \$158.50 plus a \$110.08 administration fee. At minimum a 25% down payment must be made prior to submitting the plans for review. Your options are as follows: Pay the 25% minimum, pay the full amount, or pay any amount greater than the 25% minimum; plus the \$110.08 administration fee.

- Generate a sales order based on a 25% down payment (\$39.63) plus the \$110.08 admin. fee
- Generate a sales order for the full amount (\$268.58)
- Generate a sales order for \$.00
(must be greater than 25% minimum plus the \$110.08 admin fee)



ProjectDox will make the application information available on the eForm for the plan review team.

Pay the Plan Review Down Payment

CREDIT CARD OR E-CHECK

iPermits Shopping Cart Maintenance
Sales Order Payment Selection

Shopping Cart No: 01011624
Created: 10/02/2015

The following Sales Order(s) are pending payment. Check the selection box of the ones that you wish to pay at this time.

Sales Order	Type	Date	Holds Appvd	Customer / Contractor of Record (Permit emailed to)	Fee / Amount Paid	Select to Pay
01072162	New Single Trade	02-OCT-2015	No Holds	1001-ENG ABC ENGINEERING email@abcengineering.com CITY MASTER PROJECT	\$149.71	<input checked="" type="checkbox"/>
Shopping Cart Amount Due					\$149.71	

Buttons: Create a New ILMS Shopping Cart, Return to Shopping Cart List Maintenance, Recalculate, Charge This to My APA Account, **Make Online Payment via Credit Card or Electronic Check**

On the Shopping Cart Maintenance screen, check the box of permit(s) to be paid. Then click the **Make Online Payment via Credit Card or Electronic Check** button.

If an Advanced Pay Account (APA) has been established, that payment option will also be listed.

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ILMS Shopping Cart Online Payment Processing
Payment Selection

Shopping Cart No: 01070496
Created: 11/15/2015

We need to collect the following data before your payment can be Processed. Please enter the appropriate payer name and address. Depending on the type of purchase, this data will be printed on the City issued permit documents. Consequently, data accuracy is important.

Payment Processed:

CC Holder Type: Individual Corporation or Firm

Corporation or Firm: TEST ENGINEER

Billing Address: House # 1002 Fraction Pre-Dir Street Name WASHINGTON Type Avenue Space Billing Zip Code: 77002 - 0000

Shopping Cart Amount Due 149.71

Buttons: Return to Shopping Cart Maintenance, Update Payer Information, **Continue the Credit Card/Electronic Check Payment Process**

Please Note: Electronic Check payments cannot be submitted after 6:30 PM. At present, the iPermits Online payment service does not accept American Express credit cards.

Enter the payer information and click on the **Continue the Credit Card/Electronic Check Payment Process** button.

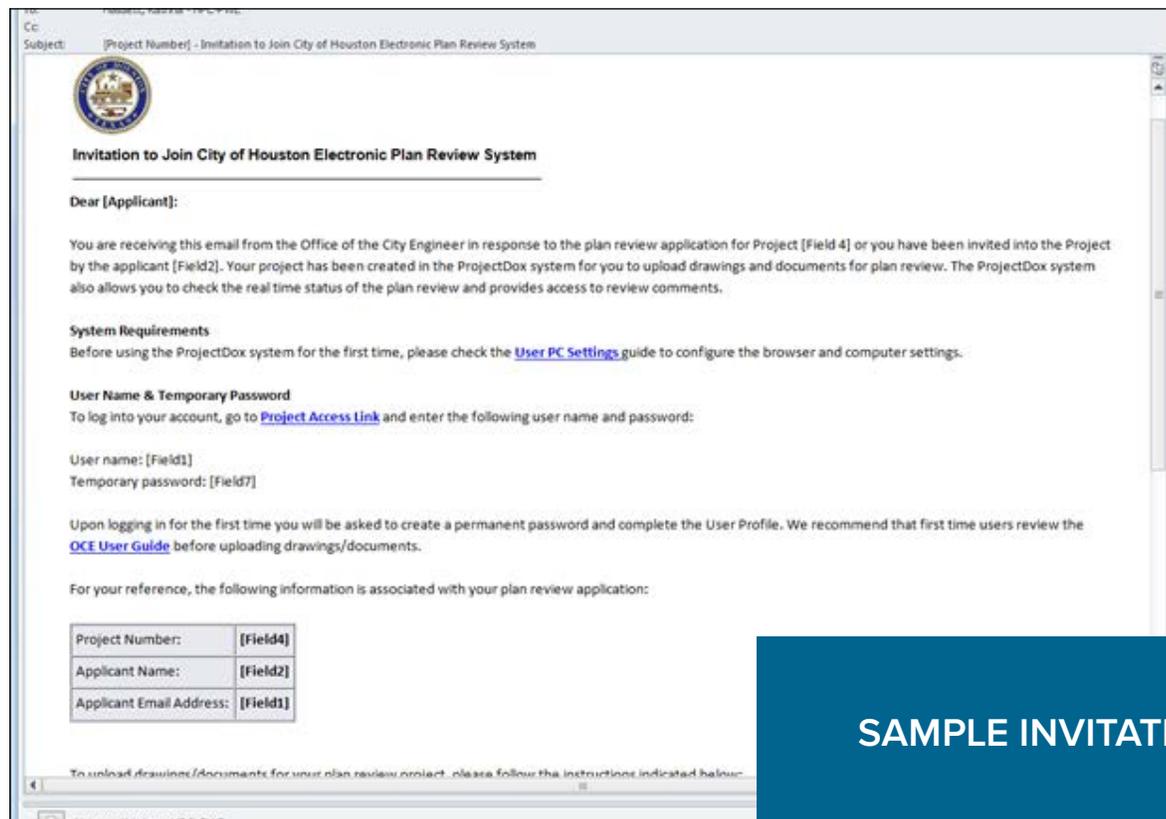
You will be transferred to the Chase® PayConnexion website to complete the transaction. A receipt will be emailed to you from Chase. You may need to check your spam or junk folder if you do not receive a payment receipt from Chase.



Note: Chase® PayConnexion will assess a convenience fee for their service. PayConnexion *does not* accept American Express credit cards.

ProjectDox Set Up

NEW USER ACCOUNT



SAMPLE INVITATION

Once the plan review down payment has been received, an invitation (see above) will be sent to the applicant to upload drawings and documents into ProjectDox. For new users, the invitation will contain a temporary password. Subsequent project invitations will not contain a password.

First-time users should note:

- ProjectDox uses pop-up windows. Configure your browser's pop-up blocker to allow for pop-ups for the ProjectDox site.

Please use the **User PC Settings** guide from the login page for instructions and other browser specific settings you need to make for the ProjectDox system.

- The login page also has a link for adding a desktop shortcut to the ProjectDox site, and a link for adding it to your favorites.

Depending upon your organization's security settings, a network administrator or IT department may need to complete the steps required for system set up.

ProjectDox Set Up

NEW USER ACCOUNT

From the invitation, click on the **Login to ProjectDox** link or **Project Access** link to open the login page using your default web browser. You can also type or paste the ProjectDox URL into another web browser.

Enter your email address and temporary password and click the **Login** button. (*The password is case sensitive.*)

You will be taken to your User Profile, where you must complete the required yellow fields:

- Change your password
- Create a security question and answer
- Contact information

Click the **Save** button to continue onto the home page.

Logging into ProjectDox a second time (and every time after that), you will use the password that you entered in your Profile page.

If you ever forget your password, click on the **Forgot Your Password?** link. You will be prompted with your security question.

Note: this feature requires that the user has logged in at least once and no longer has a temporary password.

The screenshot shows the ProjectDox login interface. At the top left is the Houston Permitting Center eSERVICES logo. The top right features the City of Houston logo and a cityscape image. The main content area contains a login form with the heading 'Enter your e-mail address and password to continue.' It has two input fields: 'E-mail:' and 'Password:'. Below the password field are two buttons: 'Login' and 'Forgot your password?'. At the bottom of the page, there are four navigation links: 'Commercial User Guide', 'Residential User Guide', 'OCE User Guide', and 'User PC Settings' (which is highlighted with a red box). The footer includes copyright information for Avolve Software and a link to 'Click here to add ProjectDox 8.3.8.2 to your Favorites.'

The screenshot displays the user profile configuration page. It is divided into three main sections. The first section is 'Change Password:', which includes fields for 'New password: *' and 'Confirm new password: *'. The second section is 'Password Reset Question & Answer:', with fields for 'Security question: *' and 'Security answer: *'. The third section is 'Profile Information', which has four tabs: 'Contact Information', 'User Metadata', 'Project Membership', and 'Group Membership'. Below the tabs is a form with various input fields. A red box highlights a 'Save' button on the right side of the form. The form fields include: 'First Name: *', 'Last Name: *', 'Email: *' (with a dropdown menu and 'HTML format' checkbox), 'Title: *', 'Company: *', 'Address 1:', 'Subdivision:', 'City:', 'State/Province:' (with a dropdown menu), 'Postal Code:', 'Phone:', 'Fax:', 'Mobile:', 'Lot No:', 'Stamps:', and 'Language: *' (with a dropdown menu). A note at the bottom states: 'LDAP/Active Directory Information:'. A red box also highlights the 'Save' button.

Navigation Basics

HOME PAGE LAYOUT

The screenshot shows the ProjectDox home page. At the top, there is a navigation bar with the ProjectDox logo and several menu items: Back, Forward, Projects, Site-Wide Reports, Profile, Logout, and Admin. Below the navigation bar is the 'Active Projects List' section, which displays a table of 11 projects. The table has columns for Project, Options, Description, Owner, Status, and Create date. A search bar is located to the right of the table with the text 'Press Enter To Search:'. Below the projects list is the 'Active Task List' section, which displays a table of tasks with columns for Project Name, Task, Attached To, Status, Priority, Due date, Created On, Updated On, Updated By, Classification, and ByPass. A large blue box with the text 'SAMPLE HOME PAGE' is overlaid on the right side of the screenshot.

Project	Options	Description	Owner	Status	Create date
15070485		TEST PROJECT 3 FOR OCE UAT	Office of City Engineer	Approved	7/31/2015 12:37:30 PM
15070486		TEST PROJECT 4 FOR OCE UAT	Office of City Engineer	Approved	7/31/2015 12:42:36 PM
15070489		TEST PROJECT 5 FOR OCE UAT TESTING	Office of City Engineer	Prescreen Resubmit	8/4/2015 8:43:06 AM
15070496		TEST PROJECT 6 FOR OCE UAT	Office of City Engineer	In Review	8/7/2015 4:27:49 PM
15084145		TEST PROJECT 8 FOR OCE UAT	Office of City Engineer	Quality Review	8/26/2015 8:49:49 AM
15084151		TEST PROJECT 9 FOR OCE UAT	Office of City Engineer	Approved Pending Payment	8/27/2015 1:34:50 PM
15084179		TEST PROJECT ON 0904 FOR OCE RIT UPDATES	Office of City Engineer	In Review	9/4/2015 4:02:04 PM
15084180		TEST PROJECT FOR OCE CONSTRUCTION SERVICES	Office of City Engineer	Resubmit Requested	9/9/2015 10:47:32 AM
15095829		OCE PROJECT ON 091415 TO TEST THE WORKFLOW	Office of City Engineer		
15095889		OCE - PLAN REVIEW APPLICATION	Office of City Engineer		
SCO OCE		SCO OCE	Office of City Engineer		

Project Name	Task	Attached To	Status	Priority	Due date	Created On	Updated On	Updated By	Classification	ByPass
15095898	ApplicantUpload	Applicant	Pending			10/5/2015 9:19:51 AM	10/5/2015 9:19:51 AM			
15095889	ApplicantUpload	Applicant	Pending			10/4/2015 9:14:53 PM	10/4/2015 9:14:53 PM			
15095891	ApplicantUpload	Applicant	Pending			10/1/2015 1:59:37 PM	10/1/2015 1:59:37 PM			

The ProjectDox home page is divided into two main sections. The upper section is your **Active Projects List**, which displays basic information about every project you have submitted for electronic plan review as an applicant and/or the list of projects you have been invited as a design team member.

By default, the 15 most recently accessed projects are listed, with the most recent at the top. Select the **All Projects** button to view a list of all of your projects.

The Active Projects List can be sorted by clicking on the header of the column.

You can search for words contained in these columns through the **Press Enter to Search** field.

The lower section of the home page is your **Active Task List**, which displays all your outstanding tasks on projects for which you are the main applicant. The Active Task List can be sorted by clicking on the column header.

Both the Active Projects List and Active Task List are set to display a limited number of entries at a time. Use these buttons  to move to the first, previous, next, or last page in the list.



ProjectDox can be used in multiple browsers, including Chrome, Safari, FireFox, and Internet Explorer. Review the *User PC Settings* document located on the ProjectDox login page to ensure proper set up is completed.

Navigation Basics

HOME PAGE TOOLBARS

Owner	Status	Create date
Nicole Thorne	Resubmit Requested	7/30/2015 8:53:16 AM
Commercial Building	Approved	3/30/2015 6:33:21 AM
Residential Building	Assign RC	7/31/2015 3:32:49 PM
Residential Building	Resubmit Requested	8/1/2015 9:43:10 AM
Residential Building	Quality Review	8/5/2015 10:17:56 AM
Residential Building	In Review	8/6/2015 12:03:22 PM
Residential Building	First Submission Pending	8/7/2015 6:57:49 PM
Residential Building	First Submission Pending	8/7/2015 7:07:48 PM
Residential Building	First Submission Pending	8/8/2015 9:52:50 AM
Residential Building	Approved	6/16/2015 11:56:58 AM

Your primary navigation buttons are located in the upper right corner of the home page.

- The **Back** and **Forward** buttons function much like the back and forward buttons in a web browser, taking you to the screen you previously or subsequently viewed.
- The **Projects** button will take you back to the home page.
- The **Profile** button will take you to your User Profile, where you can edit your personal information or change your password.
- The **Reload** button will refresh the current page you are on.
- The **Search** button allows you to search for a project based on the key information entered into the Project Info Page, or it allows you to search for keywords within a project.
- The **Help** button takes you to the ProjectDox Help site. Use the index or search functions to find instructions on specific aspects of ProjectDox
- The **Logout** button logs you out of ProjectDox.
- The **Task List** button shows any tasks requiring action from you for all projects in a separate window.

Standards

FILE TYPES AND NAMING

Prior to submittal, ensure that all files comply with the following standards. Failure to meet the City's standards may delay your review.

FILE TYPE STANDARDS

- Searchable PDF files are preferred for calculations, reports, and other supporting documentation (i.e. non-drawing files). Supported file types for the Documents are .pdf, .doc, .docx, .xls, .xlsx, etc.
- Vector pdf, .dwg, .dgn, .dwf, etc. files will be acceptable for drawings.

DRAWING STANDARDS

- Drawings should include graphical scale
- The City of Houston requires that plans be uploaded in an approved format, to scale, with an output dimension of 24" x 36"
- Standard markup names and colors will be used for each reviewing discipline for easy identification. A markup can have more than one changemark. Changemarks are created to quickly identify a markup and associated comments.

FILE NAMING

For all the construction plans in the City of Houston Right Of Way and Utilities Easements, please comply with all the standards from the [Infrastructure Design Manual](#).

File names are limited to 70 characters. Corrected files should always be resubmitted with the SAME FILE NAME as the original submittal. ProjectDox will automatically detect changes in resubmitted files of the same

name and version it. This feature allows the Engineers to overlay versions during reviews.

Note: If this is not followed the submitted file will appear as a NEW file, and not a correction to an existing file.

File names should have the page number and a brief description of what the file is. For example: 01 - Cover, 02 - General Notes, 03 - Plan and Profile. Please add "0" to single digit page numbers to avoid the page jumping from 1, 11, 12, etc. (if more than 10 pages).

FOLDER STRUCTURE

Files are securely managed through a pre-defined folder structure, which is listed below. Users cannot rename or add folders to the structure.

All drawings should be uploaded as single page files (ex: 20 pages = 20 files) into the **Drawings** folder for each project. All documentation (any non-drawing files, easements, availability letters, geo-technical reports, etc.) should be uploaded as multi-page files into the **Documents** folder.

1. Drawings
2. Documents
3. Approved
4. Construction Services
 - As-built Documents
5. Post Permit Submittals
6. Update Signature
7. Changemark Reports
8. PDF Destination Folder

Uploading Your Files

FIRST SUBMISSION TO THE CITY OF HOUSTON

Project	Options	Description
15070485		TEST PROJECT 3 FOR OCE UAT
15070486		TEST PROJECT 4 FOR OCE UAT
15070489		TEST PROJECT 5 FOR OCE UAT TESTING
15070496		TEST PROJECT 6 FOR OCE UAT
15084145		TEST PROJECT 8 FOR OCE UAT
15084151		TEST PROJECT 9 FOR OCE UAT
15084179		TEST PROJECT ON 0904 FOR OCE RIT UPDATES
15084180		TEST PROJECT FOR OCE CONSTRUCTION SERVICES
15095829		OCE PROJECT ON 091415 TO TEST THE WORKFLOW
15095869		OCE - PLAN REVIEW APPLICATION
SCO_OCE		SCO OCE

On the homepage, select the link of the project for which you want to upload your files from either the *Active Projects List* or *Active Task List*.

The screenshot shows the ProjectDox interface for project 15107680. The left sidebar displays a folder tree with 'Drawings' highlighted in red. The main content area shows a pop-up window for uploading files to the 'Drawings' folder. The pop-up window contains the following text:

15107680
Main Contact: TESTER PROJECTDOX PROJECTDOC
Folder: 15107680\Drawings

No files currently exist in **Drawings**.

To upload files into this folder
(1) Click the Upload button below
(2) Follow the instructions in the pop-up window

Large files may take a few minutes to be processed.
Click the Refresh button at the top of the page to refresh your file list view.

The right sidebar contains a 'Project Info' tab with the following fields:

- Project Name:
- Description:
- Project Image:
- Map Config Name:
- County:
- Applicant Name:
- Applicant Email:
- Phone:
- Block No:
- Lot No:
- Project Owner:

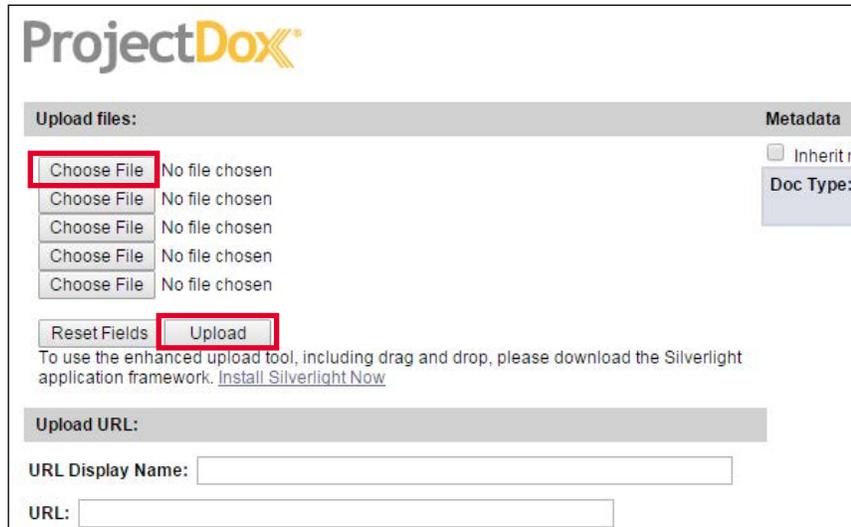
Click the “+” icon to view any subfolders and click the “-” icon to hide subfolders.

Click on the name of the folder you want to upload into. On the next screen select the **Upload Files** button.

A pop-up window will appear.

Uploading Your Files

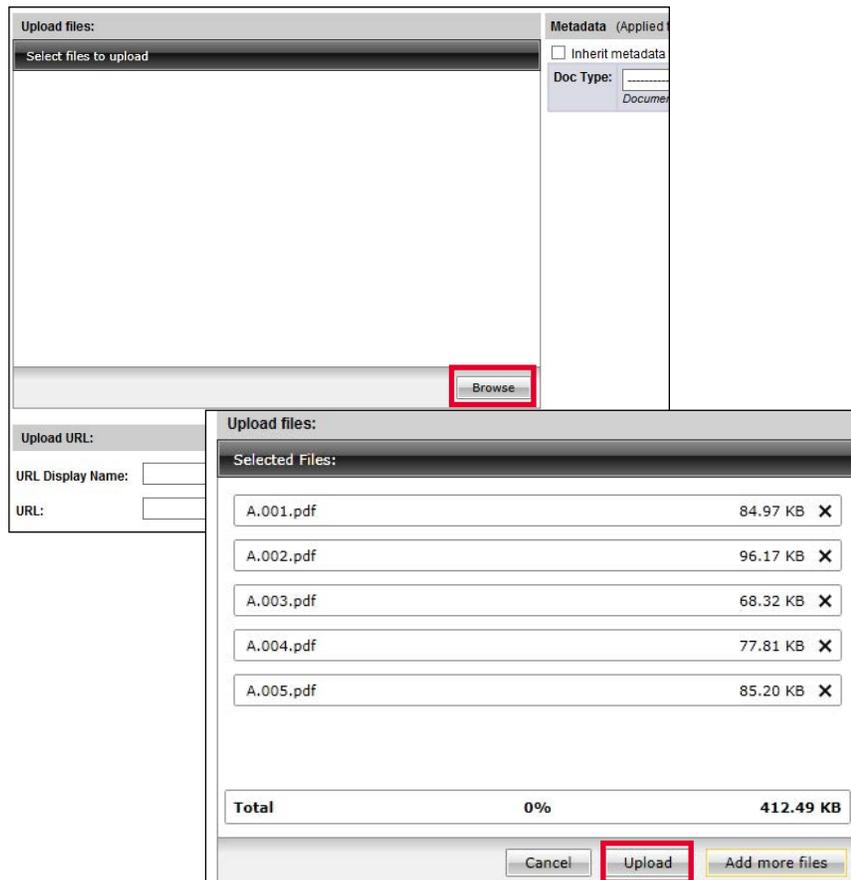
FIRST SUBMISSION



By default, up to 5 files can be uploaded at the same time.

1. Select **Choose File** and navigate to the file.
2. Select the file and click Open.
3. Once all 5 files have been selected, click the **Upload** button.

To use the batch upload tool, click on the **Install Silverlight Now** link.



With Silverlight installed:

1. Click the **Browse** button and navigate to the files.
2. Select the files and click Open.
3. Click **Upload** to add the files to the folder.

A batch size is limited to 200 files or 10GB, whichever comes first. A single file cannot be more than 1GB in size.

Uploading Your Files

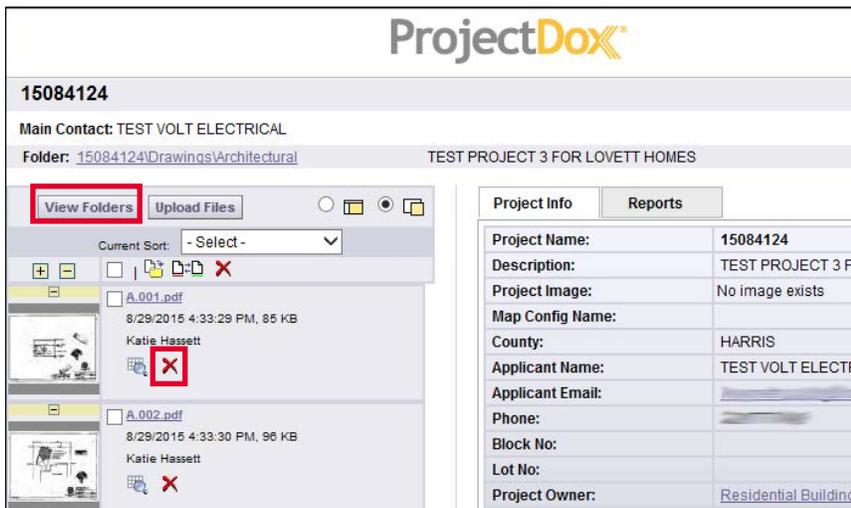
FIRST SUBMISSION

Once files are uploaded into a folder, thumbnail images of all the files will be visible. Next to each thumbnail is the filename, upload date and time, file size information, and name of the user who uploaded that file.

If a file is uploaded into the wrong folder, select the red “X” icon next to the thumbnail image to delete the file. **The ability to delete files is permitted on the first submission only.**

Individuals invited into project will not have this ability and should contact the main applicant to delete files.

To upload files into another folder, click on the **View Folders** button to return to the project’s main page. Repeat the process until all drawings and documents are uploaded into their respective folders.



Complete Assigned Task

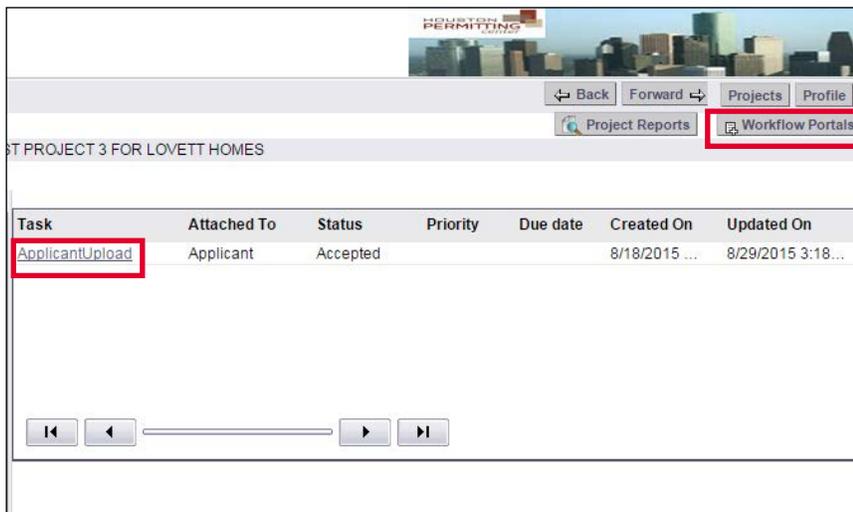
APPLICANT UPLOAD

ProjectDox moves a project through a series of tasks called a workflow. Some of these tasks are attached to the applicant and others to the Office of the City Engineer's staff.

The completion of one task signals ProjectDox to assign the next task in the workflow. Reminder notifications of an open

(i.e. incomplete) task are sent via email at designated intervals.

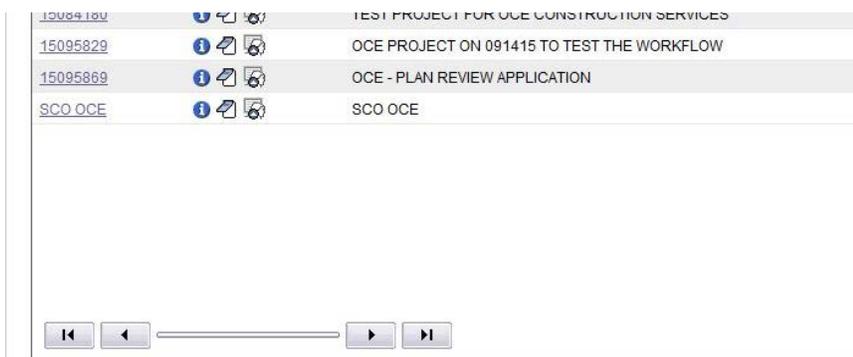
To notify the Office of the City Engineer that your plans are ready for the pre-screen review, the applicant must complete the assigned **ApplicantUpload** task. The assigned task will show a status of *Pending* until you accept it.



From the project's main page, click on the **Workflow Portals** button to display the assigned task.

Click on the **Applicant Upload** task link, and then click OK to accept the task.

The eForm will pop-up in a separate window.



Alternatively, tasks can be accessed via the **Active Task List** on the homepage.

Under the **Task** column, select the link for the corresponding project.

The eForm will pop-up in a new window.

Active Task List

Project Name	Task	Attached To	Status	Priority	Due date	Cre
15095898	ApplicantUpload	Applicant	Pending		10/4	
15095869	ApplicantUpload	Applicant	Pending		10/4	
15095891	ApplicantUpload	Applicant	Pending		10/4	

Complete Assigned Task

APPLICANT UPLOAD

HOUSTON PERMITTING center eSERVICES

Electronic Plan Review

City of Houston - Department of Public Works and Engineering

[Click Here to Save Eform as PDF...](#)

Review Information | Permit Information - 15084124 | Contact Information | Holds | Resources | Checklist Report (0)

Routing Slip

Review Coordinator: Residential Building (RESBLD@houstontexas.gov)

Review Cycle: 1

Workflow/Activity Name: Start_Residential_Building_Review / ApplicantUpload

Activity Instructions: Please upload all required drawings and documents.

Current User Logon: [Redacted]

INVITE TO CONTRACTORS GROUP

*First Name:

*Last Name:

*Email Address:

[Invite User](#)

After you have successfully uploaded all required plans/documents please select (Submission Complete) button.

[Submission Complete - Notify City of Houston Permit Center](#) [Save & Close](#)

Through the eForm, the main applicant can invite their design team members into the project. Enter the individual's name and email address and then click on the **Invite User** link. An email will be sent to the user to create an account.

Invited users will have the ability to upload and view files, but cannot complete a task (*i.e. no access to the eForm*). Invited project members will also receive the same email notifications that the main applicant receives as the project moves through the review process.

If you are not ready to complete the task, click on the **Save & Close** button. The eForm will close and the task will remain in your *Active Task List*.

If you are ready to complete the task, click on the **Submission Complete** button. All required drawings and documents should be uploaded prior to selecting this button. Once this button is clicked, permission to upload into the project is removed until the City requests additional information.

Pre-Screen Review

PROCESS OVERVIEW

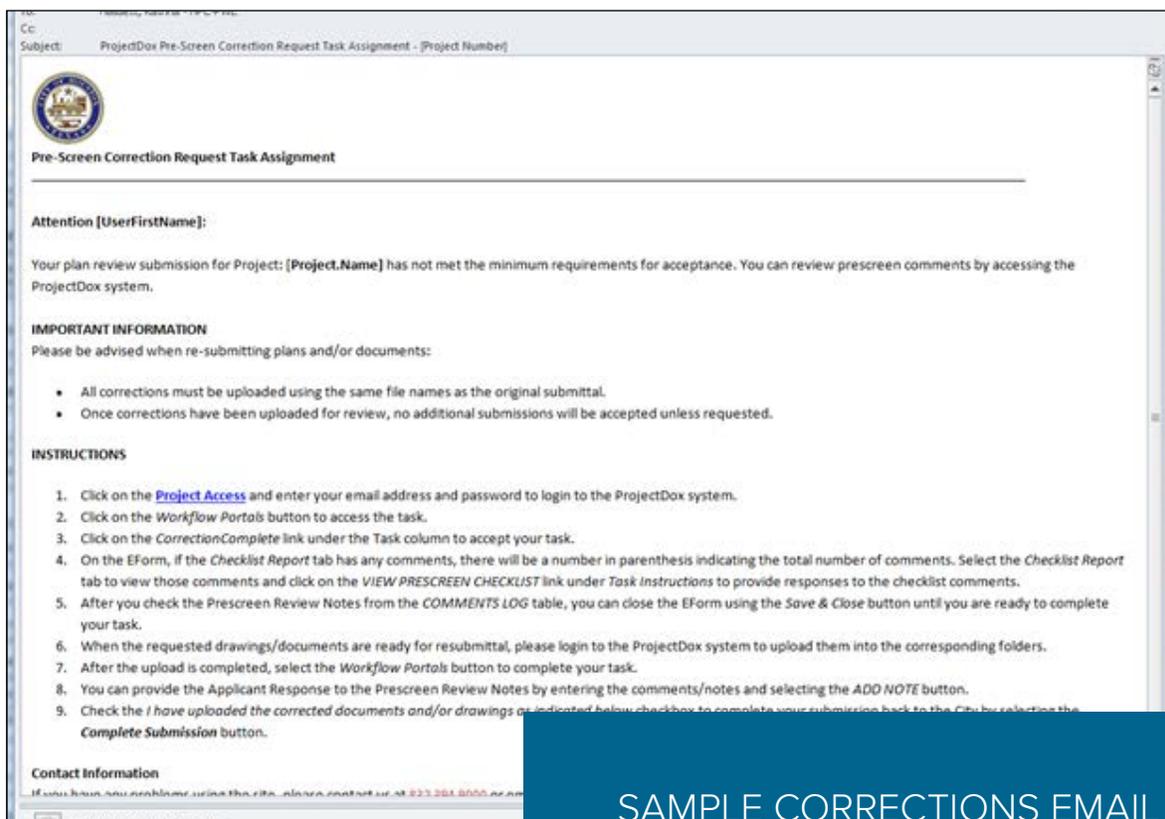
During the pre-screen review, the Intake group will review the uploaded files for completeness and compliance with the standards.

If you have met the submittal requirements, the Intake group assigns the formal review to all required disciplines.

If items are missing or corrections are required, a **CorrectionComplete** task notification will

be emailed to you with instructions on how to resubmit to fix the issues. Please login to ProjectDox system to review the information about the submittal issues from the Intake group.

Design team members invited into the project will also receive the email notifications and they would be able to upload the drawings and documents.



Pre-Screen Review

CORRECTION COMPLETE TASK

The following steps outline how to review the comments, submit corrections, and complete the assigned **CorrectionComplete** task:

1. Select the **Project Access** link in the email to login to ProjectDox.
2. Select the **CorrectionComplete** task link for the appropriate project from the *Active Task List* on the home page or from within the project.
3. Select **OK** to accept the task.
4. The eForm will pop-up in a new window. Please check the Prescreen Review Notes from the Intake group in the Comments Log table.
5. Upload files as needed to the appropriate folders. Revised files must be uploaded using the same name as the original file to allow for automated file versioning.
 - You can invite the Design team into the project from the **Invite to Design Team** section.
6. Respond to the Prescreen Review Notes by entering the comments in the text box and selecting the **Add Note** button
7. Select the check box “I have uploaded the corrected documents and/or drawings as indicated below” under Task Instructions to enable the **Complete Submission** button.
8. Select the **Complete Submission** button
9. Select **OK** to the dialog message, *Completing this task will finish your participation in this step and cannot be undone. Continue?* (Select **Cancel** to return to the eForm)

The **CorrectionComplete** task is now complete and your project status will change from *Prescreen Resubmit* to *Prescreen Review*.

Email notification is sent to the Intake group to perform the prescreen review again. If no additional information is required, the Intake group approves the prescreen review and your project will move onto the formal review. If more corrections are required, the *CorrectionComplete* task will repeat.

Review of Plans

APPROVED OR CORRECTIONS NECESSARY

Each assigned discipline will approve or reject their review by selecting the status **COMPLETED (AP)** or **CORRECTIONS NECESSARY (RJ)**. When corrections are requested, the Engineer may add checklist comments, general comments, and changemark comments to the drawings to specify the plan deficiencies.

Once all assigned disciplines have completed their review, ProjectDox system notifies the applicant and/or design team whether the plan review is approved or corrections are requested.

If all reviews have been approved, the Intake team member will apply the final Office of

the City Engineer approval stamp to all of the drawings and documents. If payment is pending, the applicant will receive an **Approved—Pending Payment** email with instructions. When there is no payment due, the applicant will receive the **Approved Plans Ready for Download** email.

If at least one engineer has selected the **Corrections Necessary (RJ)** status, the applicant will receive an email notification of the **ApplicantResubmit** task with instructions on how to resubmit to fix the issues.

Applicants may track their project’s progress in the review through the reports tab.

DEPARTMENT REVIEW - Review Cycle: 2			
CYCLE	DEPARTMENT	REVIEWED BY	STATUS & NOTES
<input checked="" type="checkbox"/>	2	STORMWATER QUALITY DEAN SETIONO DEAN.SETIONO@HOUSTONTX.GOV	COMPLETED (AP) QA CORRECTIONS
<input checked="" type="checkbox"/>	1	STORMWATER QUALITY DEAN SETIONO DEAN.SETIONO@HOUSTONTX.GOV	CORRECTIONS NECESSARY (RJ) QA CORRECTIONS

Review of Plans

APPLICANT RESUBMIT TASK

Resolved	Status	File	Cycle	Department	File	Markup	Description	Details	Applicant Response
Yes No	No		1	Stormwater Quality	01_MC3-CVR.dwg	SWQ	SWQ	Address not complete	
Yes No	No		1	Stormwater Quality	01_MC3-CVR.dwg	SWQ	SWQ	Not signed and sealed	

The following steps outline how to review the comments, submit corrections, and complete the assigned *ApplicantResubmit* task:

1. Log in to ProjectDox.
2. Select the **ApplicantResubmit** link from the *Active Task List* on the homepage or from within the project.
3. Select **OK** to accept responsibility for completing the task.
4. The eForm will open. Select the Checklist Report tab to view those comments and click on the **View Checklist** link under the corresponding discipline name to provide responses to the checklist comments.
5. If the engineers have added any markups to your drawings/documents, you can view the markups under the **Changemarks** section.
 - To view a specific markup, click on the appropriate link under the Markup column.
 - You may provide a response to each markup in the Applicant Response column.
6. You can view any comments/deficiencies noted by all the reviewing disciplines under

the **Department Review** section.

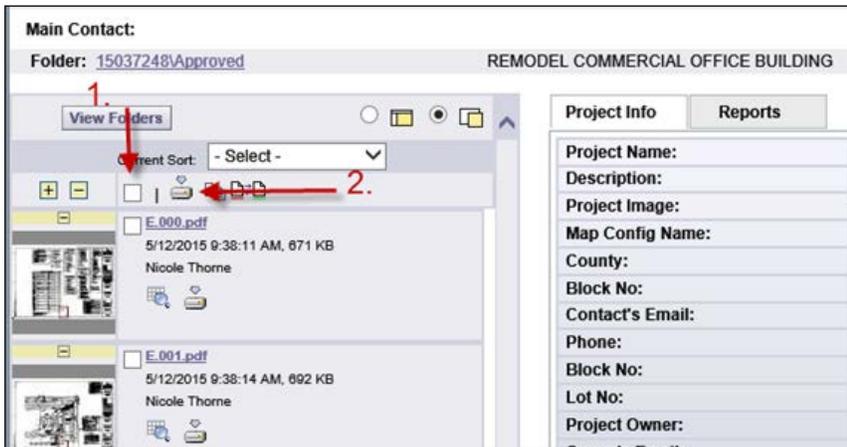
7. When all deficiencies have been addressed, upload the revised drawings/documents into the appropriate folders using the original file name(s).
8. You can also upload a document addressing each deficiency noted by every discipline into the Documents Folder
9. Check the 3 acknowledgement check boxes under the Task Instructions and click on the **Complete Submission** button to complete your task. *Note: The Office of City Engineer will not receive your revised plans if this task is not completed.*

An email notification will be sent to the Intake group assigning them to the step *Resubmit Received*. The Intake group will confirm that plans have been uploaded and the proper disciplines are assigned for the next review cycle. If any one of the disciplines rejects the review, the **ApplicantResubmit** step will be repeated until all the departments approve.

Download and Print

APPROVED PLAN SET

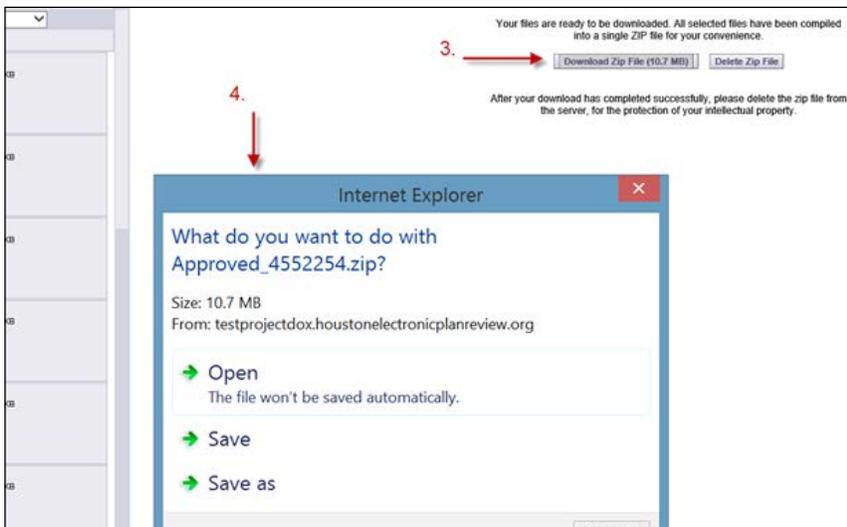
After the payment is made in iPermits system, you will receive an Approved Plans Ready for Download email indicating that you may login to ProjectDox and download your approved plans in the folder marked **Approved**.



To download the entire folder, select the box at the top of the thumbnails.

Uncheck any pages that you do not want to download.

When your selection is complete, click on the download icon.



A single zip file will be created of the selected pages.

Click the **Download Zip File** button to continue. Select Save or Save As in the pop-up window.

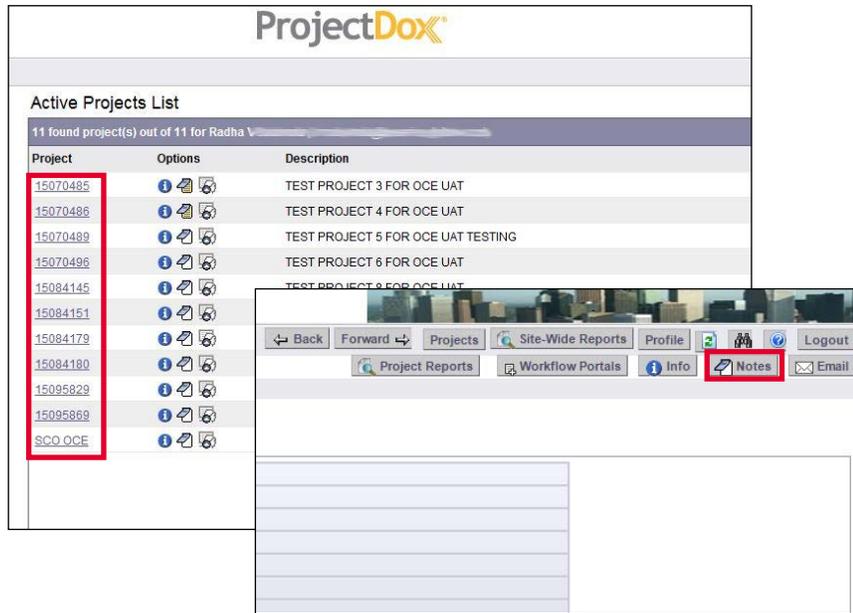
The approved plan set must be printed at a minimum size of 24”x36” and kept on the jobsite throughout the duration of construction.



Each page of the approved plan set will be stamped with the Office of the City Engineer drawing number stamp on the bottom right corner.

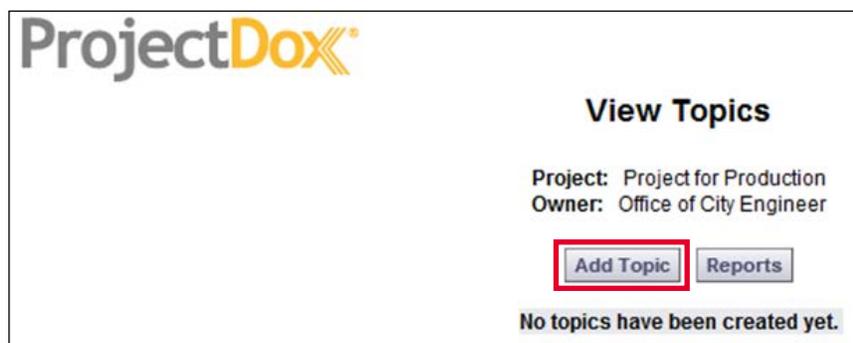
Revisions

PROCESS OVERVIEW



When a revision is required by the applicant for a project that was approved in ProjectDox, use the Topic and Notes feature to send a request to the Intake Group.

On the ProjectDox homepage, select the project link from the *Active Projects List* for the appropriate project. Then click the **Notes** button in the toolbar.



In the pop-up window, click the **Add Topic** button. The screen will refresh.

Revisions

PROCESS OVERVIEW

ProjectDox

Attach a Topic to: Project for Production
Owner: Office of City Engineer

Author: Category: **OCE - Revision Requested** Date: 10/19/2015

Subject: [Text Field]

Description: [Text Area]

Save **Save & Prepare Email**

Select **OCE – Revision Requested** from the **Category** drop-down menu. Fill in the subject line and a description of your revision request. Then select the **Save & Prepare Email** button.

The screen will refresh and display a list of Users/Groups. Check the box for **Intake** and then click the **Send** button.

ProjectDox

Team mail for Project: Project for Production
Email type: Topic/Note Notification
Topic Category: OCE - Revision Requested

Subject: Revision Requested

Body:
Revision for project "Project for Production"

Users/Groups that will be emailed (includes groups that contain users and have permissions): *

	Name
<input type="checkbox"/>	Non Group Members
<input type="checkbox"/>	Applicant
<input type="checkbox"/>	City Engineer
<input type="checkbox"/>	City Imaging
<input type="checkbox"/>	Construction Services
<input type="checkbox"/>	Flood Plain
<input type="checkbox"/>	Flood Plain Supervisor
<input checked="" type="checkbox"/>	Intake
<input type="checkbox"/>	Managing Engineer
<input type="checkbox"/>	Stormwater
<input type="checkbox"/>	Stormwater Quality
<input type="checkbox"/>	Stormwater Quality Supervisor
<input type="checkbox"/>	Stormwater Supervisor
<input type="checkbox"/>	Traffic and Street
<input type="checkbox"/>	Traffic and Street Supervisor
<input type="checkbox"/>	Urban Forestry
<input type="checkbox"/>	Waste Water

Send

After the Intake group reviews the revision request, they will start the workflow within the project. The applicants will be sent an email notification to upload the revised plans to the Drawings/Documents folders.

The revision plan review follows the same process as the original plan review submittal once the workflow is started.



Office of City Engineer charges the same submittal fee for revisions. The revision fee will be collected after the plan review is approved.

Update Signatures

PROCESS OVERVIEW

When update signatures are required for a project that was approved in ProjectDox, the applicant can use ProjectDox's Topic and Notes feature for the identified project to notify the Intake Group of its request.

Follow the steps from the *Revisions* process to create a new note and topic. Select **OCE – Update Signatures** from the *Category* drop-down menu. Fill in the subject line and description to send the email to the Intake group.

After the Intake group reviews the update signatures request, they will start the workflow within the project. The applicants will be sent an email notification to upload the revised plans into the *Update Signature* folder for the project.

For Inside City Limits projects:

1. Signatures need to be updated from the Utility companies.
2. The PE needs to specify on the cover sheet that no changes have been made with in the last year for the project and date & sign the cover sheet.

For Outside City Limits projects:

1. No Utilities signatures needed.
2. The PE needs to specify on the cover sheet that no changes have been made with in the last year for the project and date & sign the cover sheet.

POST PERMIT SUBMITTALS (For Floodplain Management Office):

After the project is approved, the inspection team may upload the inspection reports and as-built documents into the **Post Permit Submittals** folder of the project. The Flood Plain Supervisor will be notified when there are new files in this folder.

CONSTRUCTION SERVICES

If there are no changes in the field, download the cover sheet and have the contractor sign As-Built (The engineer can sign the Record Drawing) and upload it into the **As-Built** sub-folder under the *Construction Services* folder.

If there are changes in the field, please follow the below steps:

1. Download the approved drawing which requires changes (*Note: changes must be pre-approved and must meet IDM requirements.*)
2. Show the as-built condition accurately on the drawing and cloud the area.
3. Have the Engineer of Record and the Contractor sign the drawing and upload the drawing into the **As-Built** folder.
4. Repeat the process for all the required drawings
5. Make a revision note on cover sheet and have the Engineer of Record sign it.

Contact the assigned Inspector or Construction Services section at 832.394.9097 if you have any questions.

Thanks for using electronic plan review!

If you need further assistance, please contact us via email at **houston.permittingcenter@houstontx.gov**.

Live chat is available during regular business hours (8am - 5pm) at www.hpcservices.org.



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