



**HOUSTON  
PUBLIC WORKS**

Houston Permitting Center

# Office of the City Engineer Plan Review

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



PAPER PLANS ARE NO  
LONGER NEEDED

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# Revisions to User Guide

## VERSION 3.0

Revisions to this version of the user guide include:

- Process of editing sales order.
- Clarification on file names & size.
- Screen shots were updated.
- Clarification on where to upload plans on ProjectDox®.

Projects that were created prior to March 5, 2018, will see and interact with features from version 8.3 while those submitted after will interact with the new version. This user guide includes instructions for both versions of ProjectDox.

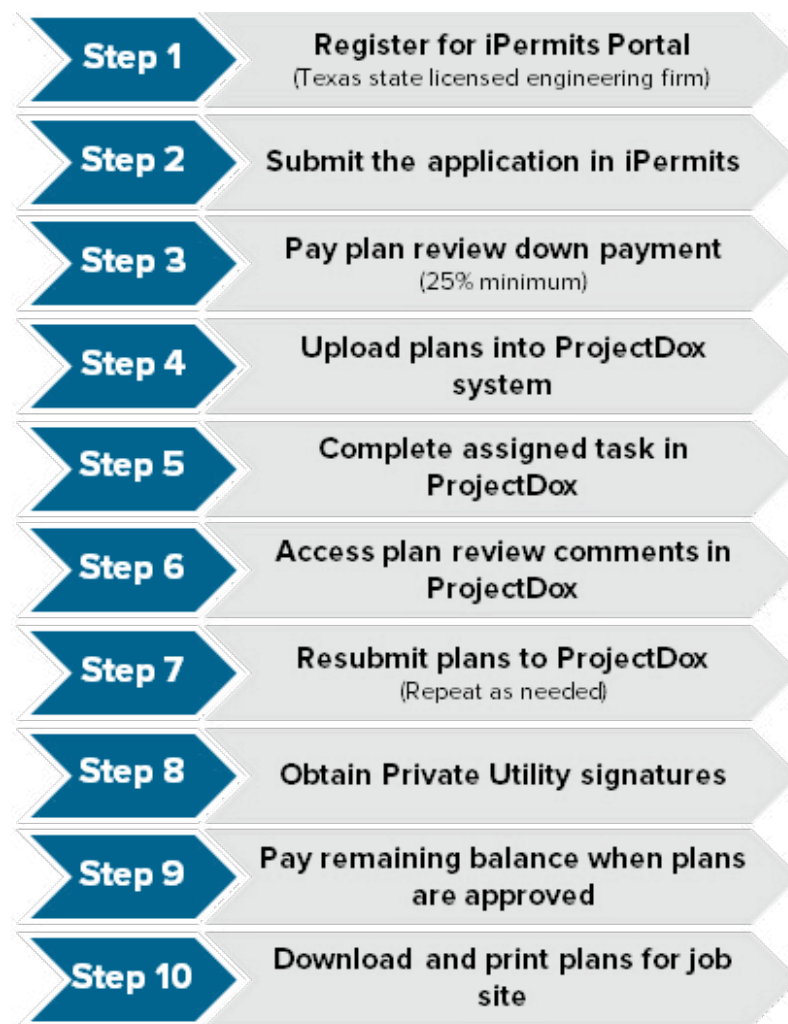
Version	Published Date
1.0	November 2018
2.0	October 2019
3.0	January 2020

# 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.



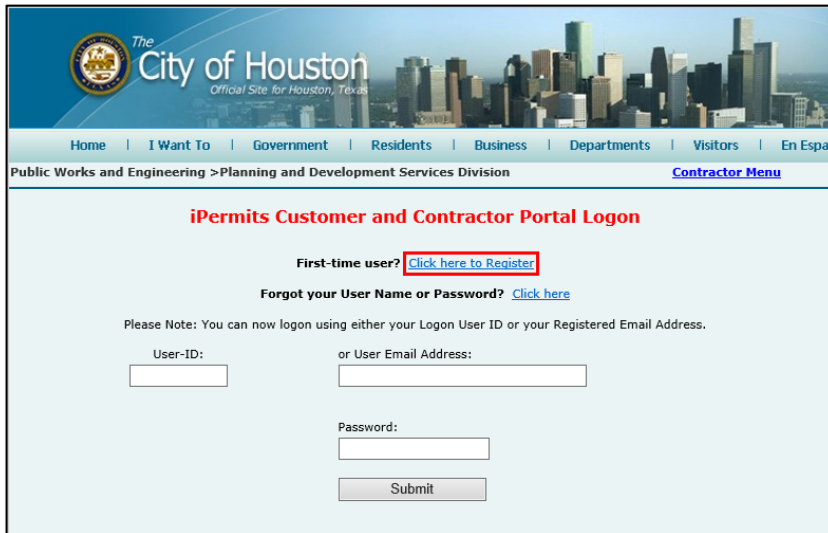
# iPermits Registration

## 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 10.*

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.



**Note:** If your engineering firm license number is not in the iPermits database, please contact the Office of the City Engineer at [oce@houston.tx.gov](mailto:oce@houston.tx.gov)

# iPermits Registration

## STEP 2: CREATING A SECURITY ADMINISTRATOR USER PROFILE

**The City of Houston**  
Official Site for Houston, Texas

Home | I Want To | Government | Residents | Business | Departments | Visitors | En Español

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:

Entity Name Type: ☐ Individual ☒ Corporation or Firm

Corporation or Firm:

Mailing Address: House #  Fraction  Pre-Dir  Street Name  Type  Space

City:  State:  Zip:

Firm Name:

Phone Number:  Phone Number:  numeric digits only

Email Address:

#### 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:  Password:  Confirm:

Email Address:

First Name:  Middle:  Last:

Mailing Address:

City:  State:  Zip:

Company Name:

Phone Number:  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.

Home | 311 City Helpline | En Español | Contact Us | FAQs | Privacy Policy

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Site best viewed at 1280 x 1024 screen size

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

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.

The screenshot shows the 'Create an Engineering Firm related User Profile' page on the City of Houston iPermits website. The page includes a navigation bar with links like Home, I Want To, Government, Residents, Business, Departments, Visitors, and En Espanol. Below the navigation bar, there's a section for 'Public Works and Engineering > Planning and Development Services Division' and a 'Contractor Menu' link. The main heading is 'Create an Engineering Firm related User Profile' with a sub-note: 'Please read the following information before proceeding'. A yellow box contains important instructions: 'Only State Licensed Engineering Firm Licensees should complete this page.', 'Fields marked with "\*" are required.', and '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 are trying to establish a web presence to purchase mechanical permits online, 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.' The form is divided into several sections: 'Engineering Firm Name Information' (License No., License Type: ENG, Entity Name Type: Individual or Corporation or Firm, Mailing Address, City, State, Zip, Firm Name, Phone Number, Email Address), 'License Information' (iPermits PIN, PIN Override checkbox), and 'User Information' (Security Level: This is my license or The user being added is a staff member, User ID, Password, Confirm, Email Address, First Name, Middle, Last, Mailing Address, City, State, Zip, Company Name, Phone Number, Fax Number). At the bottom, there's a declaration section with a checkbox for 'I hereby affirm the following declaration:' and a text area for the declaration. The form ends with 'Submit Add' and 'Clear' buttons.

**Engineering Firm Name Information**

License No: [ ] License Type: ENG  
Entity Name Type: Individual ☐ Corporation or Firm ☒  
Corporation or Firm: TEST ENGINEER  
House # [ ] Fraction [ ] Pre-Dir [ ] Street Name [ ] Type [ ] Space [ ]  
Mailing Address: 1002 [ ] WASHINGTON [ ]  
City: HOUSTON [ ] State: TX [ ] Zip: 77002 [ ]  
Firm Name: ILMS TEST  
Phone Number: [ ] Phone Number: [ ] numeric digits only  
Email Address: [ ]

**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: [ ] Password: [ ] Confirm: [ ]  
Email Address: [ ]  
First Name: [ ] Middle: [ ] Last: [ ]  
Mailing Address: [ ]  
City: [ ] State: [ ] Zip: [ ]  
Company Name: [ ]  
Phone Number: [ ] 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

# iPermits Registration

## STEP 4: ACTIVATING A NEWLY REGISTERED USER

The City of Houston  
Official Site for Houston, Texas

Home | I Want To | Government | Residents | Business | Department

Public Works and Engineering > Planning and Development Services Division

### iPermits Online Service Menu

User Profile Building Permit Applications

You are: **PROJECTD** Office of the City Engineer Plan Review Application

[Edit User Profile](#)

[User Document Catalog](#)

**[Corporate User Roster](#)**

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

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

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** Refresh List Company Maintenance

User-ID	User Name	Branch	Security Administrator
ENGINE01	PERMITS ENGINEER TEST	MAIN	Yes
ENGINE02	HOOPER ROBERT F	MAIN	
ENGINE03	ADMINISTRATOR TEST	MAIN	
KATIE	KATRINA <b>(Pending Activation)</b>	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:

Company Address:

City:  State:  Zip:

Main Phone Number:

Branch Name:  Delete Company Relationship

**User Information**

User ID:  User Status:  Corporate Security Administrator ☐

Email Address:

First Name:  Middle:  Last:

Phone Number:  Fax Number:

Mailing Address:

City:  State:  Zip:

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

Update Profile

Grant User Access To Additional Licenses Numbers

# iPermits Registration

## LINK AND AUTHORIZE THIRD PARTY USERS

Once you have created the admin account. You may add users by the following steps:

- 1) Click on “Edit User Profile”.

The screenshot shows the City of Houston iPermits Online Service Menu. The 'Edit User Profile' link is highlighted with a red box and a red circle with the number 1. The menu includes options for User Profile, You are:, Edit User Profile, User Document Catalog, and Select the desired Customer.

- 2) Click on “Grant User Access to Additional Licenses Numbers” button.

The screenshot shows the iPermits - Manage Authorized Users List (For Licensees' Use Only) page. The 'Refresh User List' button is highlighted with a red box and a red circle with the number 2. The page includes instructions for reviewing, adding, and removing users, and a section for entering licensee information.

- 3) Enter license and type (“ENG” MUST BE ALL CAPITAL LETTERS) and Web Portal PIN and click the “Refresh User List” button.

The screenshot shows the Edit User Profile page. The 'Grant User Access To Additional Licenses Numbers' button is highlighted with a red box and a red circle with the number 3. The page includes sections for User Information, Individual Name, Mailing Address, Change your password, Your user-ID is currently affiliated with the following companies, iPermits Company affiliation maintenance, and Associate your user-ID with an additional company.

# iPermits Registration

## LINK AND AUTHORIZE THIRD PARTY USERS

4. Under the iPermits User's information box. **Enter the User ID and Email address** for the user that you would like to link to your account.

The screenshot shows the 'Permits - Manage Authorized Users List (For Licensees' Use Only)' page. It includes a 'Review User List' section with instructions, an 'Add Users' section with a form to enter license and user information, and a 'Remove Users' section. The 'Enter licensee's Information' section shows License No. 10500 and Type ENG. The 'iPermits Users currently authorized to conduct business under this license number' section shows a list of users, including SD0004 - DAWOUDI, SAM. The 'iPermits User's information (to authorize additional users, complete and submit this section)' section has fields for User ID, Name, Email, and Security Level. The 'Grant this user unrestricted access to this license' radio button is selected. The 'Link and Authorize this User' button is at the bottom.

5. Click the radio button “Grant this user unrestricted access to this license”

6. **PLEASE RE-ENTER THE PIN NUMBER** before selecting “Link and Authorize this User” button

This close-up shows the 'Security Level' section. The first radio button, 'Grant this user unrestricted access to this license', is selected. The second radio button is 'Link this user's access rights to the following authorized signature entry'. Below this is a dropdown menu for 'Authorized Signatures' with the value 'No pending authorized signatures'. The 'Link and Authorize this User' button is at the bottom and is highlighted with a red box.

**Note: By selecting the Grant option does not mean that the user will have full access to your license.**

# iPermits Registration

## UNLINKING AND UNAUTHORIZING THIRD PARTY USERS

- 1) From the main menu, select the “Corporate User Roster” link on the left side.

**iPermits Online Service Menu**

User Profile  
You are: **OCE001**  
[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](#)

- 2) Then select the account you wish to remove access from.

**iPermits Corporate User Management**  
This page allows you to manage the iPermit Users associated with your company

Company: **OFFICE OF THE CITY ENGINEER** [Refresh List](#) [Company Maintenance](#) [Company Documents](#)

**Users associated with this company (00002177)**

User-ID	User Name	Branch	Security Administrator
OCE001	ENGINEER OFFICE OF CITY	MAIN	Yes
<b>SHOCKEM</b>	WIRE SHOCK THEM	MAIN	Yes

- 3) Under “User Information” unmark the “Allow User Access” box

**Associated Licenses and Accounts**

License Number	License Type	Licensee Name	License Status	Allow User Access
01234567	ENO	OFFICE OF THE CITY ENGINEER	License in good standing	<input checked="" type="checkbox"/>

[Update Profile](#)  
[Grant User Access To Additional Licenses Numbers](#)  
[Clear](#)

- 4) Then select “Update Profile”

**User Information**

User ID: **SHOCKEM** User Status: **Active** Corporate Security Administrator: ☒  
 Email Address:   
 First Name: **SHOCK** Middle: **THEM** Last: **WIRE**  
 Phone Number:  Fax Number:   
 Mailing Address:   
 City: **HOUSTON** State: **TX** Zip: **77002**

**Associated Licenses and Accounts**

License Number	License Type	Licensee Name	License Status	Allow User Access
01234567	ENO	OFFICE OF THE CITY ENGINEER	License in good standing	<input type="checkbox"/>

**[Update Profile](#)**  
[Grant User Access To Additional Licenses Numbers](#)  
[Clear](#)

- 5) This will remove that user from using your firms license information for future projects. You may go back and grant them access at any time if you are the Security Administrator.

# iPermits Registration

## INITIATING A NEW APPLICATION



Government | Residents | Business | Departments | Vi

>Planning and Development Services Division [Contr](#)

### iPermits Online Service Menu

Building Permit Applications

**Office of the City Engineer Plan Review Application**

Select the desired Customer

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

Purchase a Trade Permit

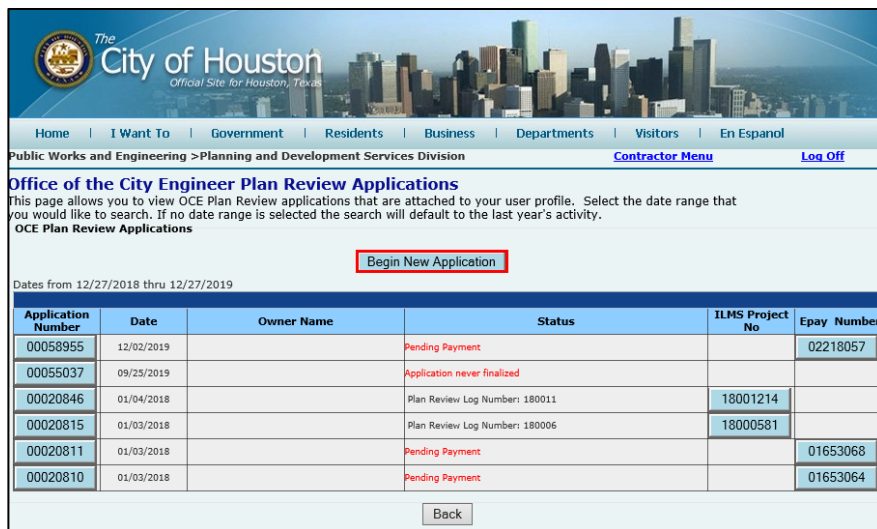
Review Your Recent Shopping Cart Entries

User Project Management - List Maintenance

Pay for a Houston Permitting Center shopping cart

Make an Advanced Payment Account Deposit

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.



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

### Office of the City Engineer Plan Review Applications

This page allows you to view OCE Plan Review applications that are attached to your user profile. Select the date range that you would like to search. If no date range is selected the search will default to the last year's activity.

OCE Plan Review Applications

**Begin New Application**

Dates from 12/27/2018 thru 12/27/2019

Application Number	Date	Owner Name	Status	ILMS Project No	Epay Number
00058955	12/02/2019		Pending Payment		02218057
00055037	09/25/2019		Application never finalized		
00020846	01/04/2018		Plan Review Log Number: 180011	18001214	
00020815	01/03/2018		Plan Review Log Number: 180006	18000581	
00020811	01/03/2018		Pending Payment		01653068
00020810	01/03/2018		Pending Payment		01653064

[Back](#)

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

**The City of Houston**  
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Home | I Want To | Government | Residents | Business | Departments | Visitors | En Español

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.
- The specified number of sheets must be accurate or the application may not be accepted

The following plans drawing types can be submitted through the OCE application process:

- Utilities construction projects in the right-of-way and/or within the easement.
- Any projects in the city right-of-way and/or within the easement tie-in to public utilities.
- Any projects in the city right-of-way and/or easement, or any projects connecting to public utilities whether inside the City of Houston or in City Extra Territorial Jurisdiction (ETJ), any projects except Capital Improvement Projects (CIP) in the city right-of-way, any public water plant, well, wastewater treatment plant, lift station or stormwater pumping station.
- Please note that any other plan type drawing submitted through the OCE process will be cancelled and applicant will have to request a refund with an approximate refund time of 8 weeks
- The following information is required for DAS applications, plans, and geographic information submittals:
- Select Digital Antenna System plan submission for DAS projects
- click link: [Application](#) for Wireless Facility, Ground Equipment, and/or Licensee Pole (use application to assist you in completing your GIS table)
- Plans must be submitted within 30 days (no refunds)
- Click link for: [GIS requirements](#)
- Submit any other required documents/information

**Application**

Click the following checkbox if submitting a Digital Antenna System (DAS) Project ☐

Please Describe the Proposed Development\*:

Number of Sheets\*:

☐ In FloodZone ☐ Trees In ROW

Key Map\*: ☐ Water Facility ☐ Wastewater Facility

County\*: [Please Select](#) ☐ Inside City Limits ☐ Outside City Limits

**Applicant/Engineer Information**

Firm License/Type:  \*TEO, LLC

Mailing Address:

City:  State:  Zip: 77005

Contact\*:

Phone Number\*:  Phone Number:  numeric digits only

Email Address\*:

Engineer of Record\*:

Phone Number\*:  numeric digits only

Email Address\*:

**Owner Information**

Please note: Owner Information must be provided unless you indicate that the applicant is the owner.

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:

[Save & Continue](#)

[Reset](#)

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

- Click the box if application is for a **DAS Project**.
- Enter the description from the cover sheet into the "Please describe the Proposed Development" box.
- 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 wills 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 2017, the Office of the City Engineer plan check fee as been increased from \$79.67 per sheet to \$80.49 per sheet. Based on the above mentioned, 13 sheets, this application's plan check fee is \$1,092.65 plus a \$116.75 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 \$116.75 administration fee.

☒ Generate a sales order based on a 25% down payment (\$273.16) plus the \$116.75 admin. fee

☐ Generate a sales order for the full amount (\$1,209.40)

☐ Generate a sales order for \$ .00  
(must be greater than 25% minimum plus the \$116.75 admin fee)

Save and Continue

Finalize Application

Reset



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

Create a New ILMS Shopping Cart

Shopping Cart No: 02242704 Return to Shopping Cart List Maintenance

Created: 12/03/2019

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

Select Sales Orders for Payment							
Sales Order	Type	Date	Holds Appvd	Customer / Contractor of Record (Permit emailed to)	Update Required	Fee / Amount Paid	Select to Pay
02398314	New Single Trade	03-DEC-2019	No Holds	8978-ENG TEO, LLC teolc@gmail.com CITY MASTER PROJECT		\$200.80	<input checked="" type="checkbox"/>
<b>Shopping Cart Amount Due</b>						<b>\$200.80</b>	

Recalculate

View the payment transmittal

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.

**ILMS Shopping Cart Online Payment Processing**  
Payment Selection

Shopping Cart No: 02242704 Return to Shopping Cart Maintenance

Created: 12/03/2019

Payment Processed:

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.

CC Holder Type: Individual ☐ Corporation or Firm ☒

Corporation or Firm: TEO, LLC

Billing Address: House # 5510 Fraction  Pre-Dir Street Name COMMUNITY Type Drive Space

Billing Zip Code: 77005 - 0000

**Shopping Cart Amount Due** 200.80

Update Payer Information

Continue the Credit Card/Electronic Check Payment Process

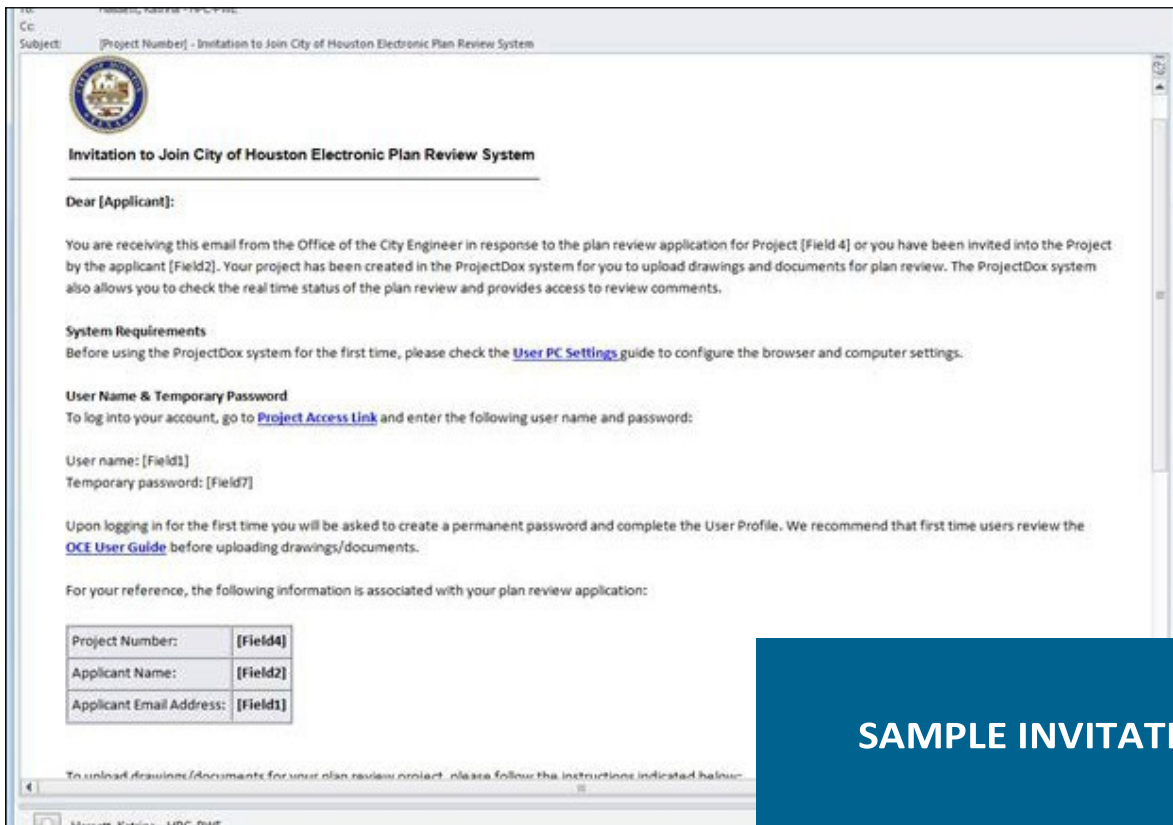
Please Note: Electronic Check payments cannot be submitted after 8:30 PM.

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.

# 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

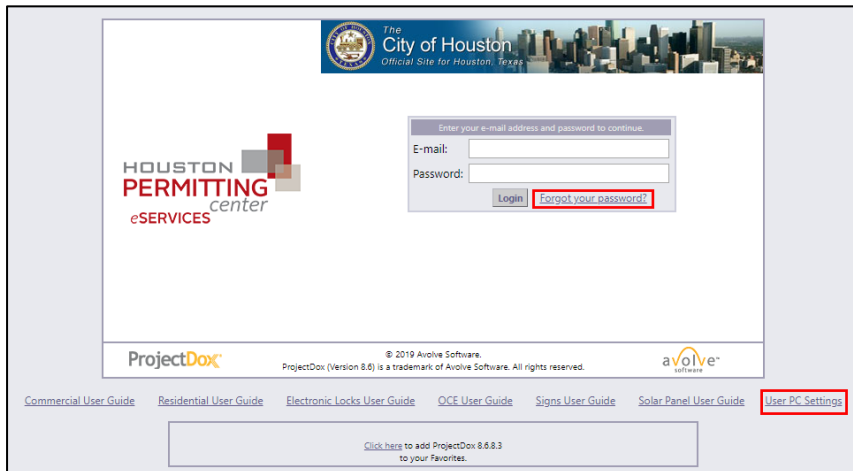
From the invitation, click on the **Login to ProjectDox** link or **Project Access** link to open the login page using your default web browser. You can also type or paste the ProjectDox URL into another web browser.

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

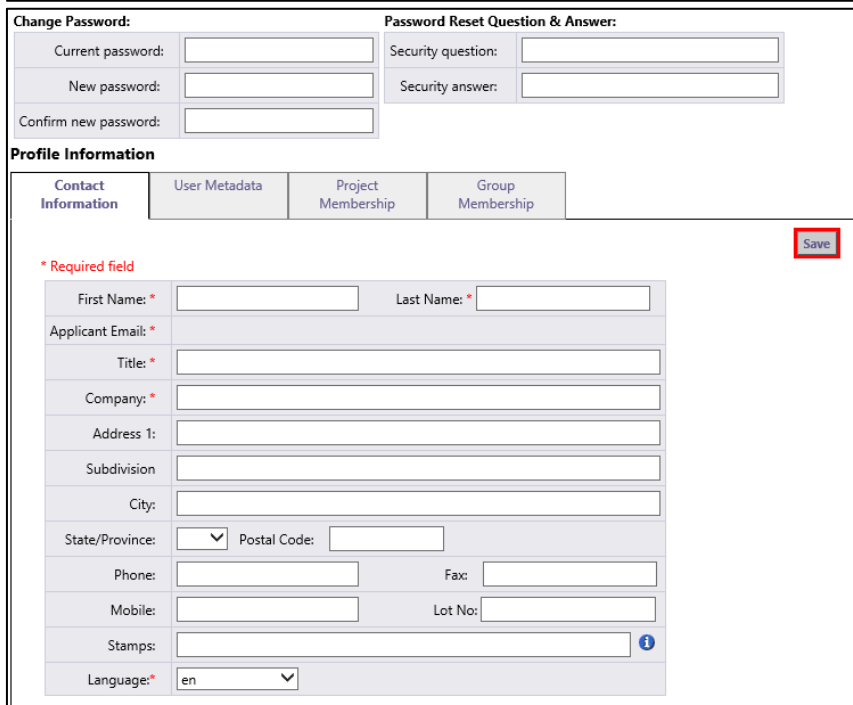
Click the **Save** button to continue onto the home page.



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.*



# Navigation Basics

## HOME PAGE TOOLBARS

The screenshot displays the ProjectDox home page. At the top, there's a navigation bar with the ProjectDox logo and a city skyline. Below this, the 'Active Projects List' section shows a table with columns: Project, Options, Description, Owner, Status, and Create date. Two projects are listed: 18137682 (TEST PDX) and 18114642 (CE FIX TEST 11-13-18). Below the projects list is a pagination control. The 'ProjectFlow Task List' section is below that, with a 'Refresh' button and a table with columns: TASK, PROJECT, INSTANCE, GROUP, ASSIGNMENT TYPE, STATUS, and a date column. Four tasks are listed, including 'Apply Drawing Number' and 'Prescreen Corrections Task'. A large blue box with the text 'SAMPLE HOME PAGE' is overlaid on the right side of the screenshot.

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 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.

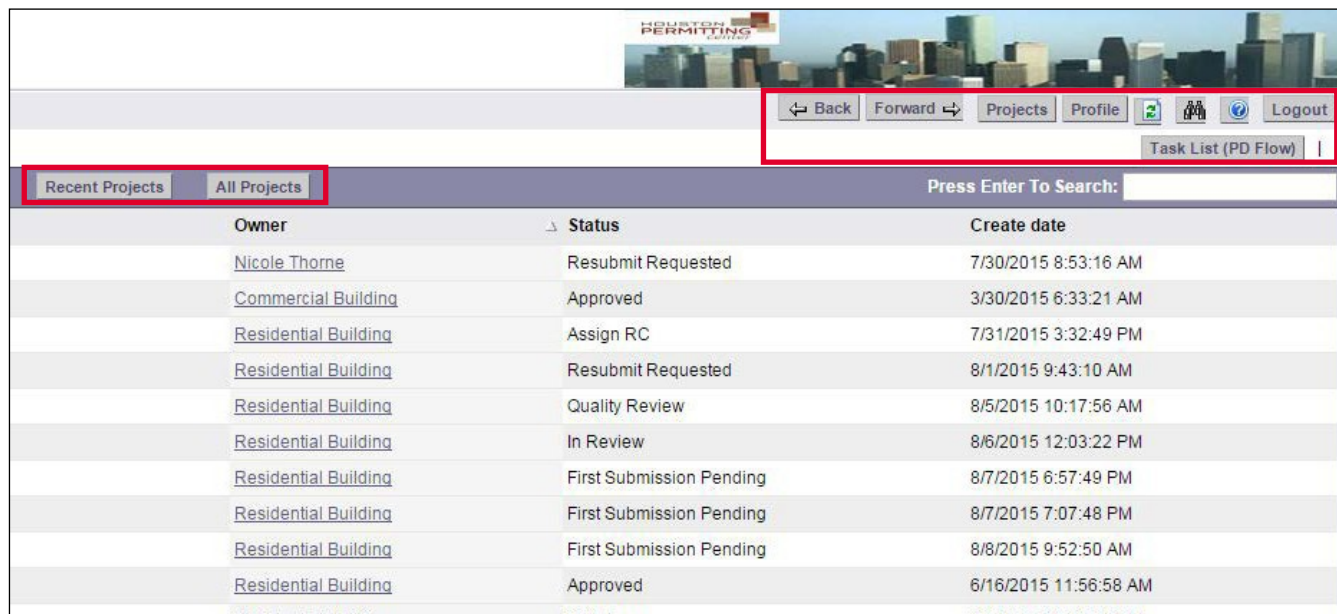
Both the Active Projects List and Active Task List are set to display a limited number of entries at a time. Use these buttons

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.** It can be used on Windows or Mac devices. However, ProjectDox behaves differently with each browser and works best with Internet Explorer.

# Navigation Basics

## HOME PAGE TOOLBARS



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

- DOC, DOCX, and PDF files are accepted for calculations, reports, and other supporting documentation (i.e. non-drawing files)
- Flat Files recommended (no layer). Vector PDF and JPEG 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 22" x 34"
- 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.

FOLDER	SHEET NO.	EXAMPLE
DRAWINGS	001-999	01-COVER
DOCUMENTS	001-999	NO STARD CONVENTION
POST PERMIT SUBMITTALS	001-999	01-PLAN AND PROFILE
UPDATE SIGNATURE	001-999	01-COVER
REVISION	001-999	01-COVER
BLUELINE RECORDS	001-999	FOR COH USE
QUICK REVIEW	001-999	FOR COH USE

# Uploading Your Files

## FIRST SUBMISSION TO THE CITY OF HOUSTON

ProjectDox		
Active Projects List		
11 found project(s) out of 11 for Radha V		
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*.

ProjectDox

15107680

Main Contact: TESTER PROJECTDOX PROJECTDOC

Expand current | Collapse | TEST FOR PROJECTDOX

15107680

Drawings

Documents

Approved

Construction Services

As-Built Documents

Post Permit Submittals

Update Signature

ChangeMark Reports

PDFDestinat

Project Info

Report

Project Name:

Description:

Project Image:

Map Config Name:

County:

Applicant Name:

Applicant Email:

15107680

Main Contact: TESTER PROJECTDOX PROJECTDOC

Folder: 15107680\Drawings TEST FOR PROJECTDOX

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

View Folders

Upload Files

Project Info

Reports

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 TO THE CITY OF HOUSTON

The screenshot shows the ProjectDox upload interface. At the top, there's a 'ProjectDox' logo and a 'Close Window' link. Below the logo are two tabs: 'Upload Files' and 'Upload URL'. The main area is titled 'Browse For Files' and contains the instruction 'Browse for files or drag files into this area.' Below this is a large dashed rectangular area for file uploads. In the top right corner of this area, there are two buttons: 'Browse For Files' and 'Upload Files'. The 'Browse For Files' button is highlighted with a red rectangular box.

By default, up to 200 files or 10 GB, whichever comes first. Up to 200 files can be uploaded at the same time per folder.

1. Select **Browse For Files** and navigate to the file.
2. Select the file and click Open.
3. Once all files have been selected, click the **Upload Files** button.

This screenshot shows the ProjectDox upload interface with a file being uploaded. The 'Browse For Files' button is still highlighted. Below the dashed upload area, a progress bar is shown for the file 'EL01.FIRST FLOOR DRAWINGS.pdf'. The progress bar is partially filled, and the text '0B/8.86MB' is displayed next to it. Below the progress bar, it says '0 of 1 uploaded' and 'Hide Details'. At the bottom right of the dashed area, the text '0B/8.86MB' is also displayed.

This screenshot shows the ProjectDox upload interface with a list of uploaded files. The text 'The following files have been uploaded:' is at the top. Below it is a list of two files: '1. EL01.FIRST FLOOR DRAWINGS.pdf' and '2. EL02.SECOND FLOOR DRAWINGS.pdf'. The first file is highlighted in blue. Below the list, there is a note: 'Files highlighted in blue are version candidates. They will be versioned if the file content has been changed in any way.' At the bottom center, there is a 'Close' button.

## FIRST SUBMISSION TO THE CITY OF HOUSTON

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.**

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

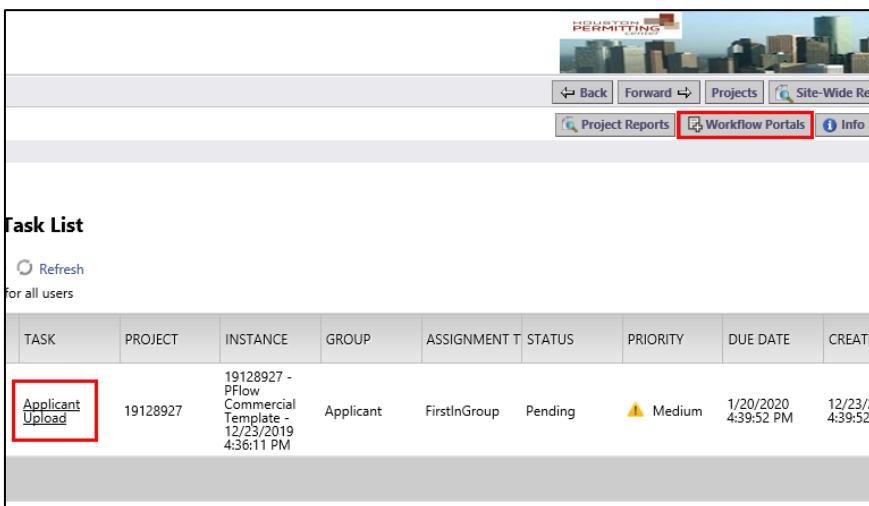
(i.e. incomplete) task are sent via email at designated intervals.

To notify the Office of the City Engineer that your plans are ready for the pre-screen review, the applicant must complete the assigned **Applicant Upload** 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.



**Task List**

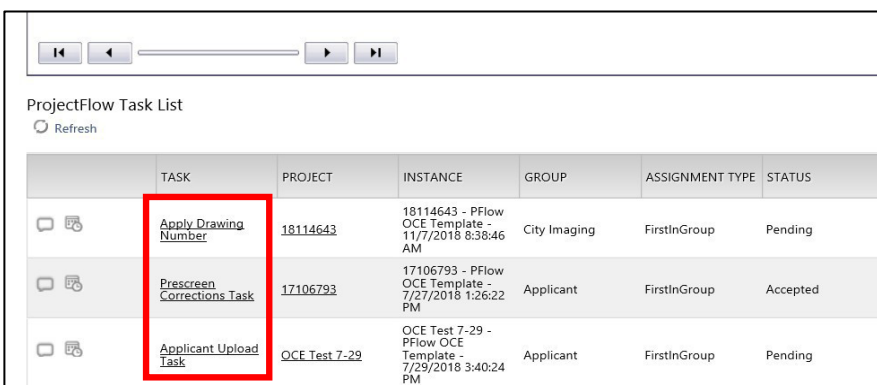
[Refresh](#)  
for all users

TASK	PROJECT	INSTANCE	GROUP	ASSIGNMENT T	STATUS	PRIORITY	DUE DATE	CREATE
<a href="#">Applicant Upload</a>	19128927	19128927 - PFlow Commercial Template - 12/23/2019 4:36:11 PM	Applicant	FirstInGroup	Pending	Medium	1/20/2020 4:39:52 PM	12/23/2019 4:39:52 PM

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.



**ProjectFlow Task List**

[Refresh](#)


	TASK	PROJECT	INSTANCE	GROUP	ASSIGNMENT TYPE	STATUS
	<a href="#">Apply Drawing Number</a>	18114643	18114643 - PFlow OCE Template - 11/7/2018 8:38:46 AM	City Imaging	FirstInGroup	Pending
	<a href="#">Prescreen Corrections Task</a>	17106793	17106793 - PFlow OCE Template - 7/27/2018 1:26:22 PM	Applicant	FirstInGroup	Accepted
	<a href="#">Applicant Upload Task</a>	OCE Test 7-29	OCE Test 7-29 - PFlow OCE Template - 7/29/2018 3:40:24 PM	Applicant	FirstInGroup	Pending

# Complete Assigned Task

## APPLICANT UPLOAD

**APPLICANT UPLOAD**

ProjectFlow  
PLANNING

avolve  
software

Project Information

Permit Information

HOLD Data

Resources

Invite Design Team

**Project Name:** OCE Test 7-29

**Project Description:** OCE Test 7-29

**Coordinator:**

**Review Cycle:** 0

**Workflow/Activity Name:** OCE Plan Review Workflow/Applicant Upload

**Current User Login:** Enrique Leon

**Task Instructions**

After you have successfully uploaded all required plans and documents, please click the Upload Complete - Notify HCP button.

☐ I have uploaded all required drawings and/or documents.

Upload Complete - Notify HCP

Complete Later

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

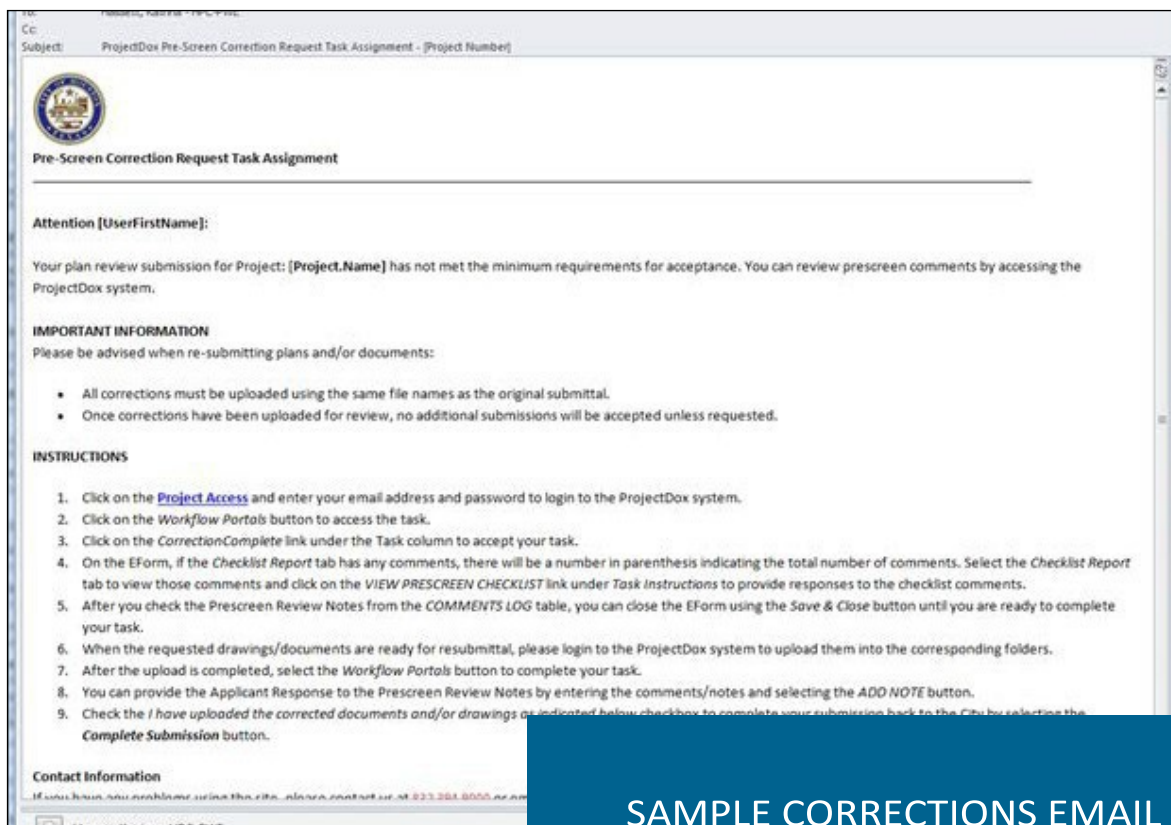
During the pre-screen review, the Intake group will review the uploaded files for completeness and compliance with the standards.

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.
6. You can invite the Design team into the project from the **Invite to Design Team** section.
7. Respond to the Prescreen Review Notes by entering the comments in the text box and selecting the **Add Note** button
8. 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.
9. Select the **Complete Submission** button
10. 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.

# Pre-Screen Review

## CORRECTION COMPLETE TASK


**APPLICANT RESUBMIT**


---

Project Information
Permit Information
HOLD Data
Resources
Invite Design Team

**Project Name:** 19116566

**Project Description:** TEST UPGRADE 5.73

**Coordinator:** Enrique Leon

**Review Cycle:** 1

**Workflow/Activity Name:** OCE Workflow/Applicant Resubmit

**Current User Login:** Claudia Garcia (Claudia.Garcia@houston.tx.gov)

**Task Instructions**  
After you have successfully uploaded all required plans and documents, please click the Resubmit Complete button.

### Note:

If new sheets are needed to be inserted that renumber existing sheets you may:

- Number the sheets with a #1, #2, #3, etc... or #A, #B, #C, etc...
- Insert renumbered file names and write a note on your comment box in Eform stating "sheets have been renumbered and sheets from previous sheets need to be moved."

Discussion Comments

**Discussion Topics:** Staff Review Applicant Resubmit

**Description:** Staff Review Applicant Resubmit


**Project:** 19116566

**Discussion Leader:** Claudia Garcia

Add Comment

Show 5 records

DISCUSSION COMMENT	PARTICIPANT	DATE/TIME
0 - 0 of 0 records		



View Changemark Items (0)
View/Edit Checklist Items (0)

Department	Reviewed By	Status	Reviewer Comments	Applicant Comments
Water Supervisor 831	Enrique Leon	Rejected (RJ)		

**Task Instructions**

☐ I have reviewed and addressed, including responses where appropriate, all Checklist Items accessed by clicking on the "Checklist Items" button above.

☐ I have reviewed and addressed, including responses where appropriate, all Changemark Items accessed by clicking on the "Changemark Items" button above.

☐ I have uploaded the revised drawings and/or documents required as a result of the review into the appropriate folder in the project using the SAME file names as the original files. I am ready to complete my assigned task and resubmit back to the jurisdiction for further review.

Resubmit Complete
Close

# HOW TO RUN REPORTS IN PROJECTDOX



ProjectDox The City of Houston Official Site for Houston, Texas

Active Projects List

1 found project(s) out of 1 for Mariana Castillo (Mariana.Castillo@houstonbcgov)

Project	Options	Description	Owner	Status
19085957		TEST FOR ILMS UPGRADE VERSION 5.69	Commercial Building	First Submission Pending

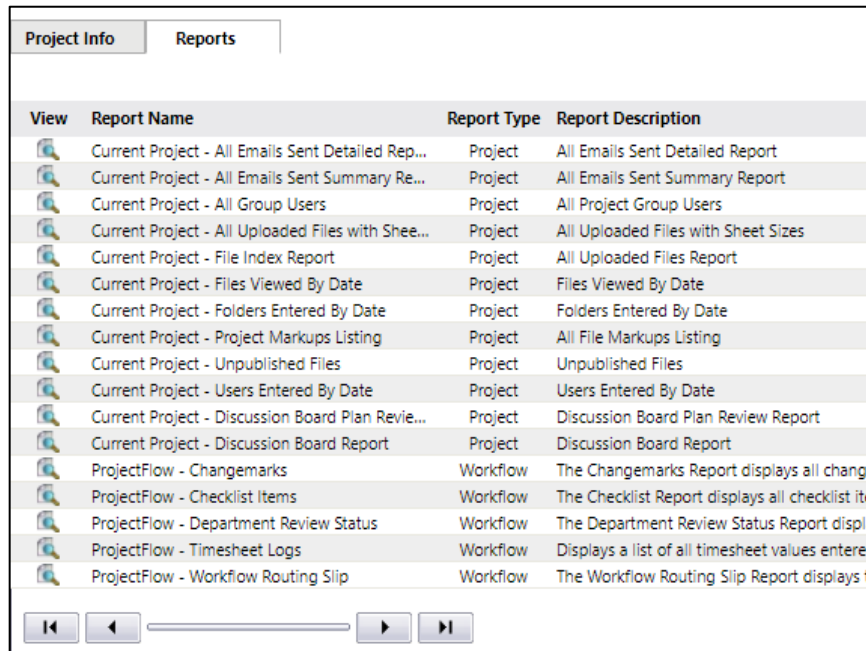
**STEP 1** Log in to your ProjectDox account and select the project number to run report.

**STEP 2** Click on Report Tab. Select the magnifying glass on report you wish to run.

**STEP 3** Click on Drop Down arrow. Select the report and Click View Report.

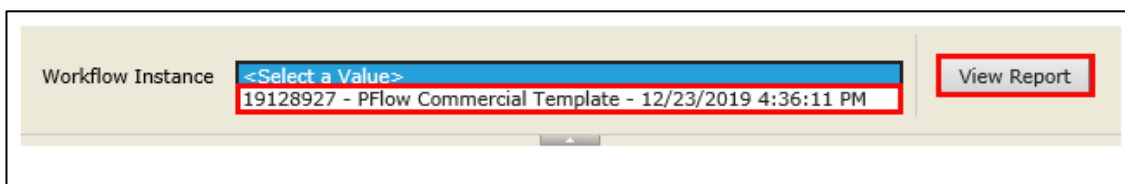
The most common reports you would want to run are:

- Check List Items
- Department Review Status
- Workflow Routing Slip



Project Info Reports

View	Report Name	Report Type	Report Description
	Current Project - All Emails Sent Detailed Rep...	Project	All Emails Sent Detailed Report
	Current Project - All Emails Sent Summary Re...	Project	All Emails Sent Summary Report
	Current Project - All Group Users	Project	All Project Group Users
	Current Project - All Uploaded Files with Shee...	Project	All Uploaded Files with Sheet Sizes
	Current Project - File Index Report	Project	All Uploaded Files Report
	Current Project - Files Viewed By Date	Project	Files Viewed By Date
	Current Project - Folders Entered By Date	Project	Folders Entered By Date
	Current Project - Project Markups Listing	Project	All File Markups Listing
	Current Project - Unpublished Files	Project	Unpublished Files
	Current Project - Users Entered By Date	Project	Users Entered By Date
	Current Project - Discussion Board Plan Revie...	Project	Discussion Board Plan Review Report
	Current Project - Discussion Board Report	Project	Discussion Board Report
	ProjectFlow - Changemarks	Workflow	The Changemarks Report displays all change
	ProjectFlow - Checklist Items	Workflow	The Checklist Report displays all checklist ite
	ProjectFlow - Department Review Status	Workflow	The Department Review Status Report displa
	ProjectFlow - Timesheet Logs	Workflow	Displays a list of all timesheet values entered
	ProjectFlow - Workflow Routing Slip	Workflow	The Workflow Routing Slip Report displays t

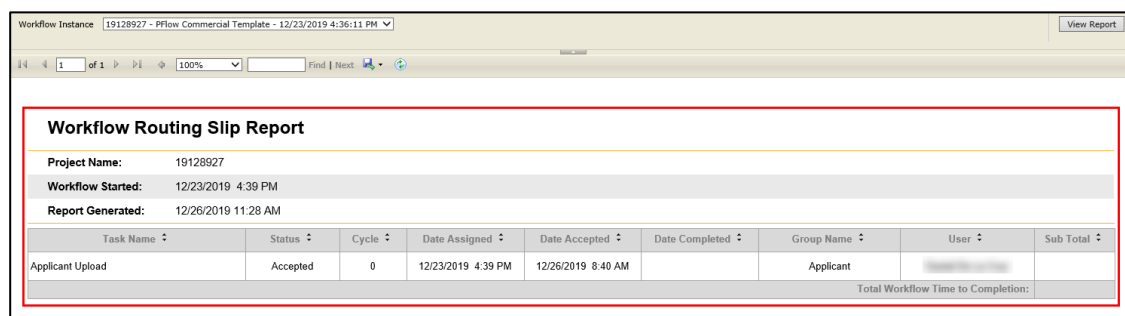


Workflow Instance

<Select a Value>

19128927 - PFlow Commercial Template - 12/23/2019 4:36:11 PM

View Report



Workflow Instance 19128927 - PFlow Commercial Template - 12/23/2019 4:36:11 PM

View Report

Workflow Routing Slip Report

Project Name: 19128927

Workflow Started: 12/23/2019 4:39 PM

Report Generated: 12/26/2019 11:28 AM

Task Name	Status	Cycle	Date Assigned	Date Accepted	Date Completed	Group Name	User	Sub Total
Applicant Upload	Accepted	0	12/23/2019 4:39 PM	12/26/2019 8:40 AM		Applicant		

Total Workflow Time to Completion:

# 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
			<div>QA CORRECTIONS</div> <div>COMPLETED (AP)</div>

View Changemark Items (1)

View/Edit Checklist Items (0)

Department	Reviewed By	Status	Reviewer Comments	Applicant Comments
Water Supervisor 831	Enrique Leon Enrique.Leon@houston.tx.gov	Rejected (RJ)		

# Review of Plans

## APPLICANT RESUBMIT TASK

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

1. Log in to ProjectDox.
2. Select the **Applicant Resubmit** 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 clicking the **View Changemark Items** button to open the changemark viewer.
  - 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 **Applicant Resubmit** step will be repeated until all the departments approve.

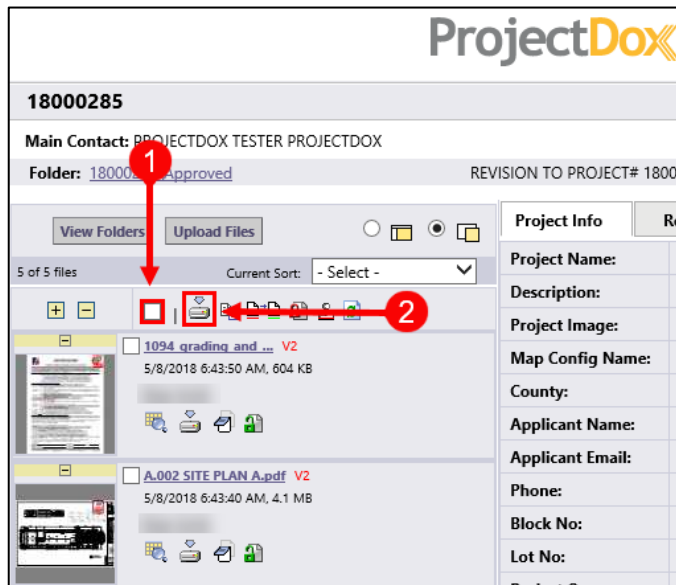
Note: If new sheets are needed to be inserted that renumber existing sheets you may:

- Number the sheets with a #1, #2, #3, etc... or #A, #B, #C, etc...
- Insert renumbered file names and write a note on your comment box in Eform stating "sheets have been renumbered and sheets from previous sheets need to be moved."

# Download and Print

## APPROVED PLAN SET

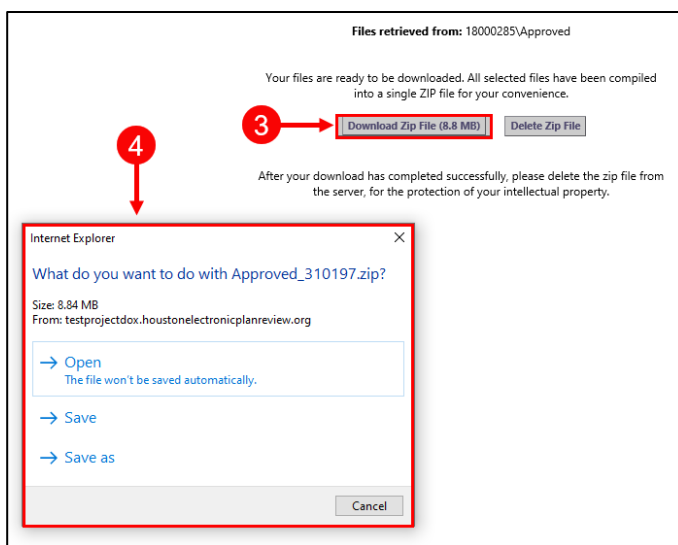
After the payment is made in iPermits system, you will receive an Approved Plans Ready for Download email indicating that you may login to ProjectDox and download your approved plans in the folder marked **Approved**.



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.

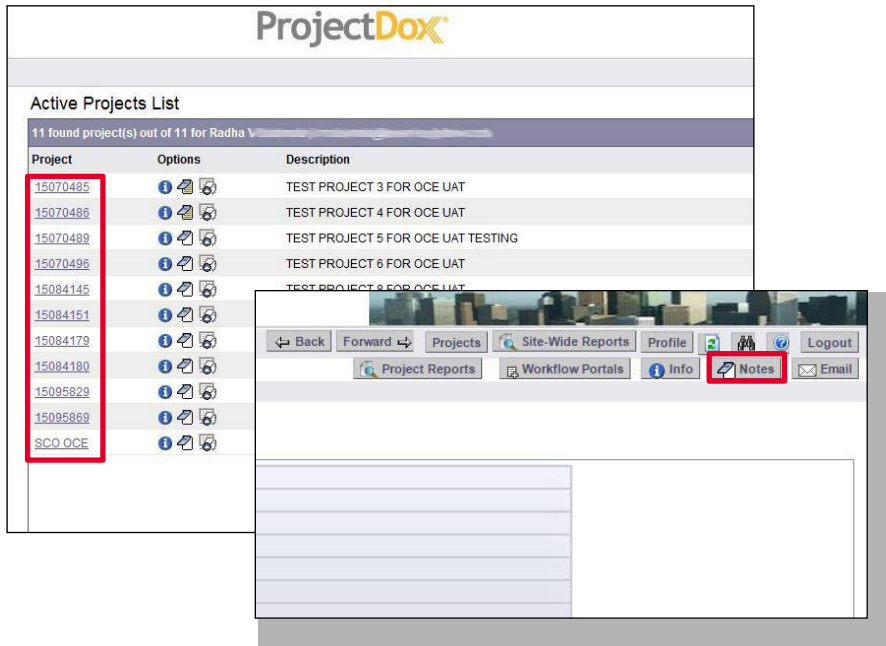
**The approved plan set must be printed at a minimum size of 24"x36" and kept on the jobsite throughout the duration of construction.**



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.

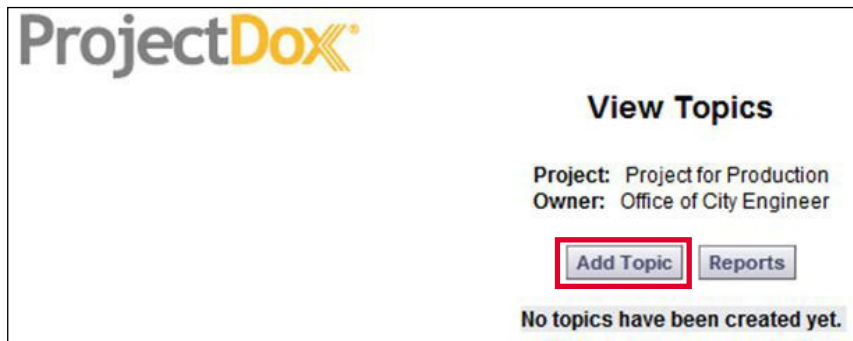
# Revisions

## 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:

Description:

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"/>	<b>Intake</b>
<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.

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

### 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.



**Thanks for using electronic plan review!**

If you need further assistance, please contact us via email at  
**[oce@houstontx.gov](mailto:oce@houstontx.gov)**



# **HOUSTON PUBLIC WORKS**

Houston Permitting Center

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1002 Washington Avenue  
Houston, Texas 77002

832.394.8810

[oce@houstontx.gov](mailto:oce@houstontx.gov)

[www.houstonpermittingcenter.org](http://www.houstonpermittingcenter.org)