



Electronic Locks Plan Review

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



SAVE PAPER, HELP THE ENVIRONMENT!

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iPermits Registration

STEP 1: CREATE A LICENSED COMPANY PROFILE

NOTE:

- If you are not an engineer or master electrician, skip to Step 2 on page 7 to create a non-licensed user profile.
- A company and its users must be registered for iPermits before an application can be submitted. If your company is already registered, please skip the iPermits registration process and go to page 8 to **Step 1: CREATE AN APPLICATION.**

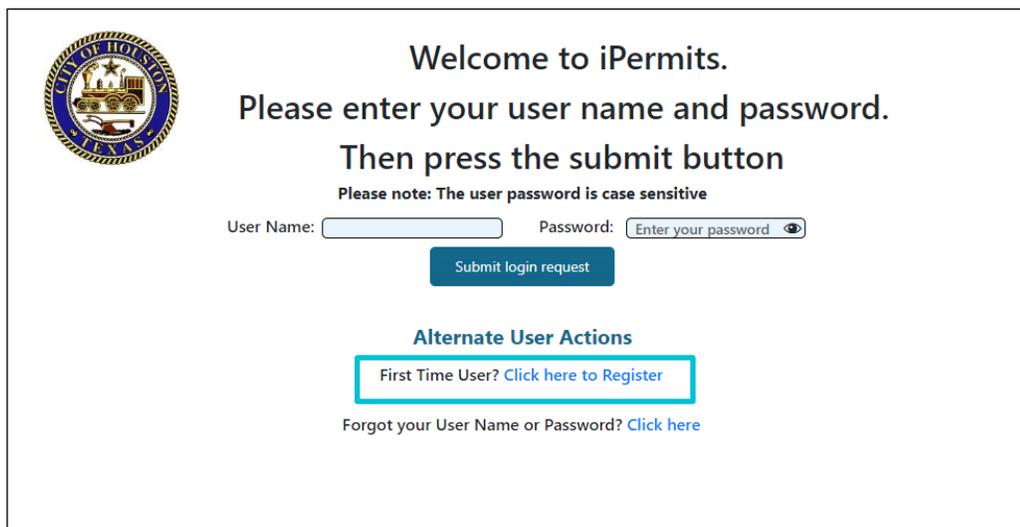
A company and its users must be registered for iPermits before an application can be submitted.

To create a licensed user company profile, the applicant must complete an **iPermits Acknowledgement** form and submit it either in person or via email to:

- elocks@houstontx.gov

The form must be notarized if submitting via email. All fields are required unless otherwise noted.

Once the application is processed, you will receive an email from the City of Houston with instructions to create the profile.



City of Houston logo

Welcome to iPermits.

Please enter your user name and password.

Then press the submit button

Please note: The user password is case sensitive

User Name: Password:

Submit login request

Alternate User Actions

First Time User? [Click here to Register](#)

Forgot your User Name or Password? [Click here](#)

To create an iPermit login account please click on **First Time User.**

iPermits Registration

STEP 2: CREATE A USER PROFILE

Please help us identify the appropriate user registration process.

Are you associated with an electrical, plumbing, mechanical, fire alarm, fire line, sign, or sprinkler trade contractor?

Yes No

Are you associated with a Texas state licensed engineering firm?

Yes No

Do you have a City of Houston iPermits advanced payment account?

Yes No

Press Submit to begin the 'Non-License related' or Homeowner user registration process.

Submit

Please answer the following questions to create an iPermits account.

Create a User Profile For a Non-Licensed User or Homeowner

Please read the following information before proceeding

- Fields marked with "*" are required.
- Once the user profile is created, your User ID and Password will be sent to the email address provided below.

User Information

Email Address:*

Email

Confirmation:*

Password:* Confirm:*

Individual Name

First Name: Middle: Last:

Customer/Contractor/User State Issued Identification Information

Identification Number:* State:

Note: This is normally the user's State issued driver's license number

Mailing Address

Address Type:* PO Box Street

No.* Fraction* Dir.* Street Name*

Type* Dir.* Unit Id* Unit#*

City State Zip Code Zip Plus

Phone Number:* Fax Number:

Company Name:

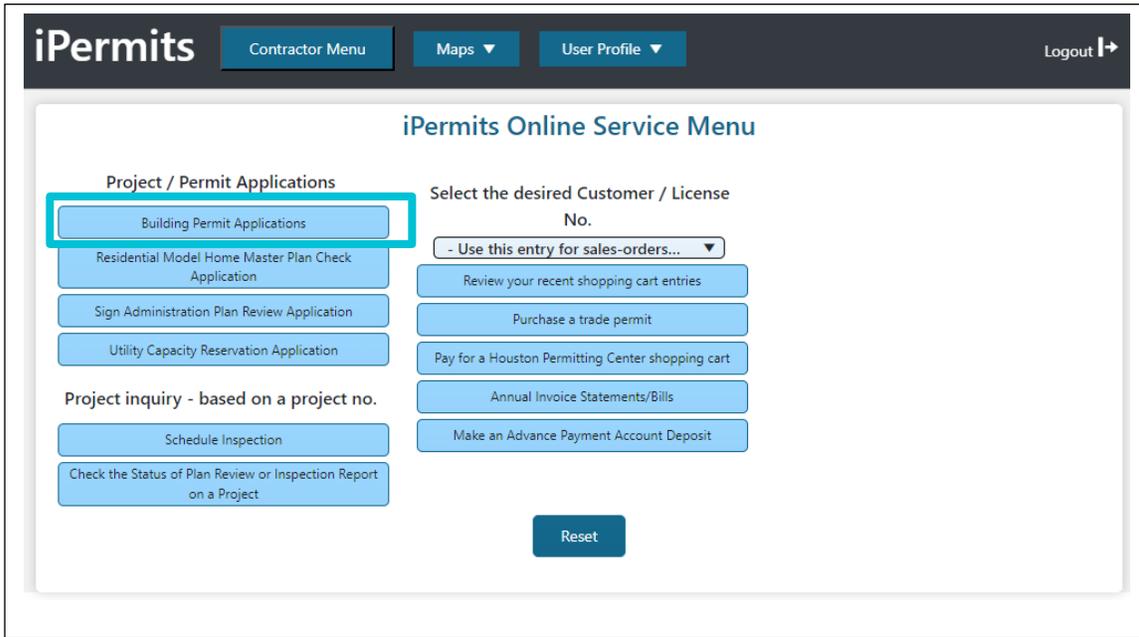
Submit Add

Clear

Fill out the required information to create a User Profile for a Non-Licensed User.

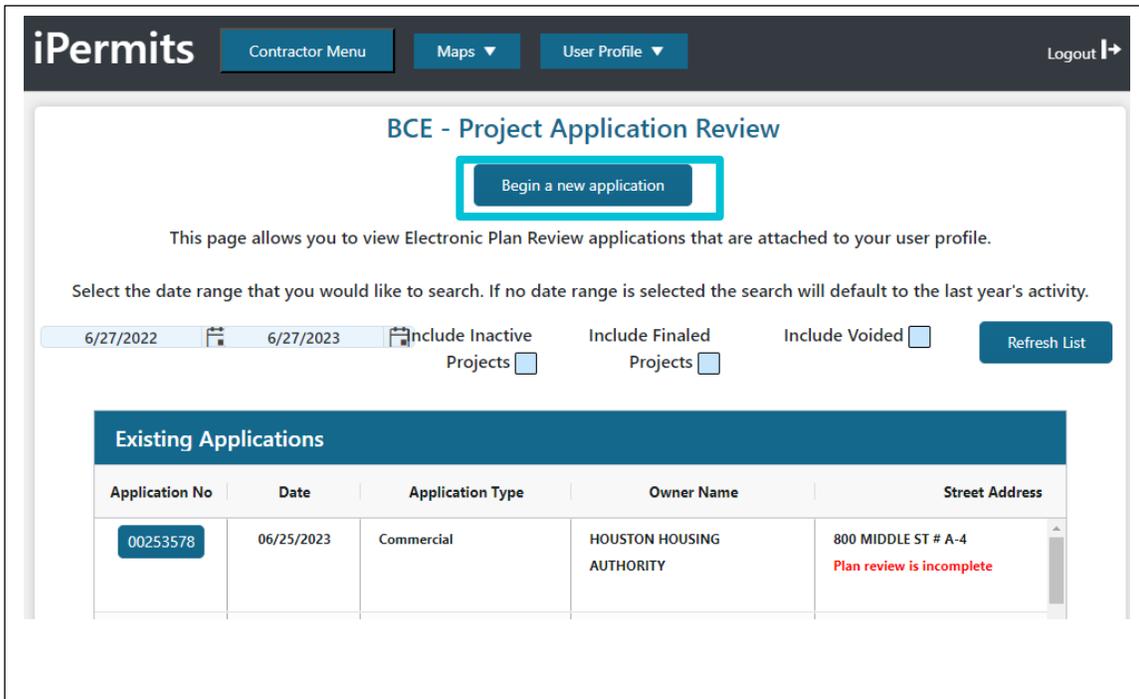
Application Process

ELECTRONIC LOCKS APPLICATION



Log into your iPermits Portal account.

Under the iPermits Online Service Menu, click on Building Permit Application button.



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

Application Process

ELECTRONIC LOCKS APPLICATION

Building Applications

Click the button to Toggle the dropdown menus.

Commercial Applications

Residential Applications

Storm/Flood Damage Applications

Housing and Community Development Applications

Click on **Commercial Applications**.

Building Applications

Click the button to Toggle the dropdown menus.

Commercial Applications

New/Remodel Commercial Building (only one active)

One-Stop Commercial Building Permit Application

Site Work Permit Application

Electronic Locks

Fire Alarm

Sprinkler

Plan Revision Application for an Existing ILMS Project

Underground Fire Line Plan Check

Deferred Submittal Application for an Existing ILMS Project

Click the **Electronic Locks** button.

Application Process

ELECTRONIC LOCKS APPLICATION

Electronic Locks Building Project Application - Address Search
ADDRESS SEARCH OR ASSIGNMENT

All Building permit applications will be associated with a specific address. Using the below search feature, enter the physical address of where the work will be performed.

For address related assistance please email hpcaddressing.team@houstontx.gov or call 832.394.8899. During the application process you will also be offered the opportunity to submit the application.

Note:
Do not enter street directions, (e.g., N., S., W., etc.)
Do not enter street types (e.g., Rd., Dr., etc)

Number Street Name

Complete the street number, abbreviated as Street No, and Street Name fields. Then click the **Search for Address** button.

Do not enter street directions (e.g., N, S, E, W) nor street types (e.g. Dr., Rd., Ave., etc.) into the address search.

Electronic Locks Building Project Application - Address Search

Your address search returned the displayed street names results. Click on the appropriate street name.

If your Street Name does not appear on the list, contact the City of Houston HPC-Addressing at 832-394-8899 or hpcaddressing.team@houstontx.gov for assistance.

Qualified Street Names	
Address	
<input type="text"/>	WASHINGTON AVE

Click on the correct street name from the generated list to continue

If your street name does not appear on the list, contact the City of Houston Addressing Team Hpcaddressing.team@houstontx.gov for assistance.

Application Process

ELECTRONIC LOCKS APPLICATION

From the generated list, click on the correct street number to continue.

If the street number is not listed, click on the button The needed property address is not listed and contact the Addressing team via email at Hpcaddressing.team@houstontx.gov for assistance.

Click on the **Back** button to return to the list of qualified addresses.

Electronic Locks Building Project Application - Address Search

Your Property Address inquiry has qualified the following Addresses. Click on the appropriate Address.

Suite, Floor, Building Number Not Listed:

If your exact address (including the Space) does not appear in the list, click one that matches your Street Number.

Street Number Not Listed:

If your Street Number does not appear in the list, contact the City of Houston.

Qualified Addresses	
Address	Name on situs
1000 WASHINGTON AVE 1001 77002	HPC TEST PROJECTS 2, 012
1000 WASHINGTON AVE 102 77002	TEST, PLUMBING PERMIT
1000 WASHINGTON AVE 111 77002	TESTING ELECTRICAL PERMIT
1002 1/2 WASHINGTON AVE 77002	CITY OF HOUSTON- PERMITTING CENTER
1002 1/2 WASHINGTON AVE SIGNS 77002	SIGNS TEST
1002 WASHINGTON AVE 77002	CITY OF HOUSTON- PERMITTING CENTER
1002 WASHINGTON AVE - 77002	AIA HOUSTON
1002 WASHINGTON AVE 2ND 77002	CITY OF HOUSTON- PERMITTING CENTER
1002 WASHINGTON AVE 3RD 77002	CITY OF HOUSTON- PERMITTING CENTER

The needed street name is not listed.

Application Process

ELECTRONIC LOCKS APPLICATION

- Choose the County in which the project is located.

***Note: if other parts of the project address are changed, the address verification process is triggered.**

- Describe the proposed development under the Project Information.
- Select the **appropriate Project No.** which corresponds to the Certificate of Occupancy (CO) for that address.



Application list

Electronic Locks Plan Review Application - Page 1 of 2

Instructions

Complete this page in its entirety and click the Save & Continue button to proceed to page 2 of the application. For **General Inquiries** please contact Building Code Enforcement at 832-394-9494 or [Building Code Enforcement](#).

Please read the following information before proceeding

- Fields marked with "*" are required.
- Submittal of false information will result in invalidation of the application.

Applicant Name & Address Information

Owner, Tenant, Business Name
Entity Name Type: Individual Corporation or Firm
Corporation or Firm Name

Project Address

No.	Fraction	Dir.	Street Name	Type	Dir.	Unit Id	Unit#
<input type="text" value="1002"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="WASHINGTON"/>	<input type="text" value="AVENUE"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
City		Zip Code*		Zip Plus		County*	
<input type="text"/>		<input type="text" value="77002"/>		<input type="text" value="0000"/>		<input type="text" value="Please Select"/>	
Key Map		# of Stories					
<input type="text"/>		<input type="text"/>					

Complete the following fields for new construction only.

Subdivision	Lot/Block	Tract
<input type="text"/>	<input type="text"/>	<input type="text"/>

Project Information

Describe the proposed development*

Describe the proposed development

Structure Type & Project Scope

Structure Type

License Select:

C/O project selection

Application Process

ELECTRONIC LOCKS APPLICATION

- If the applicant is not the owner, complete the Owner Information fields.
- Once all required fields are completed, click the **Save & Continue** button to go to the next page.

If a project number is not listed, it is important to confirm that a CO exists for that address. Please contact Occupancy Inspections section at elocks@houstontx.gov or Open Records section at 832-394-9063 for further assistance.

Applicant Name & Address Information

Last/First/Middle

Entity Name Type: Individual Corporation or Firm

Last: First: Middle:

Address

Street #: Fraction: Pre-Dir: Street Name:

Type: Space:

City: State: Zip Code: Zip Plus: Phone*:

Phone: Email*:

Relationship to project:

Owner Name & Address Information

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

Last/First/Middle

Entity Name Type: Individual Corporation or Firm

Last: First: Middle:

Address

Street #: Fraction: Pre-Dir: Street Name:

Type: Space:

City: State: Zip Code: Zip Plus: Phone:

Phone: Contact: Email:

Application Process

ELECTRONIC LOCKS APPLICATION

Enter the required information on Page 2. Once complete, click the **Save & Continue** button located at the bottom of the page.

If known, enter contact information for the Project Manager and General Contractor. Otherwise, click on **The Project Manager is yet to be determined** box.

Application list Application Page 1 Application Page 2

Electronic Locks Plan Review Application - Page 2 of 2

Please read the following information before proceeding

- Fields marked with "*" are required.
- Submittal of false information will result in invalidation of the application.

Application

Application Number: 00272382 Date: 06/28/2023

Project Address: 1002 WASHINGTON AVE

Project Scope: Electric Locks, Office

Describe the proposed development: TEST C

Before proceeding ensure the address listed above is the location where the work will be performed. A permit is only valid for a specific address. If the address provided is inaccurate an address change is required. There is a fee associated with this change.

Responsible Parties

Project Manager Information

Enter or Copy One of the Following to the Project Manager Information. Applicant Owner

The Project Manager is yet to be determined

Entity Name Type: Individual Corporation or Firm

Last: [Last Name] First: [First Name] Middle: [Middle Name]

Address

Street #: [Street #] Fraction: [Fraction] Pre-Dir: [Pre-Dir] Street Name: [Street Name]

Type: [Type] Space: [Space]

City: [City] State: [State] Zip Code: [Zip Code] Zip Plus: [Zip Plus] Phone*: [Phone]

Phone: [Phone] Contact*: [Contact] Email*: [Email]

General Contractor Information

Enter or Copy One of the Following to the General Contractor Information. Applicant Owner

Project Manager

The General Contractor is yet to be determined

Entity Name Type: Individual Corporation or Firm

Last: [Last Name] First: [First Name] Middle: [Middle Name]

Address

Street #: [Street #] Fraction: [Fraction] Pre-Dir: [Pre-Dir] Street Name: [Street Name]

Type: [Type] Space: [Space]

City: [City] State: [State] Zip Code: [Zip Code] Zip Plus: [Zip Plus] Phone: [Phone]

Phone: [Phone] Contact: [Contact] Email: [Email]

Save and Continue

Application Process

ELECTRONIC LOCKS APPLICATION

- Check the disclaimer box and click the **Finalize Application** button to create a project number.
- Note: For Electronic Locks Permit no **Declaration in Support of Application for City of Houston Building Permit** is needed.

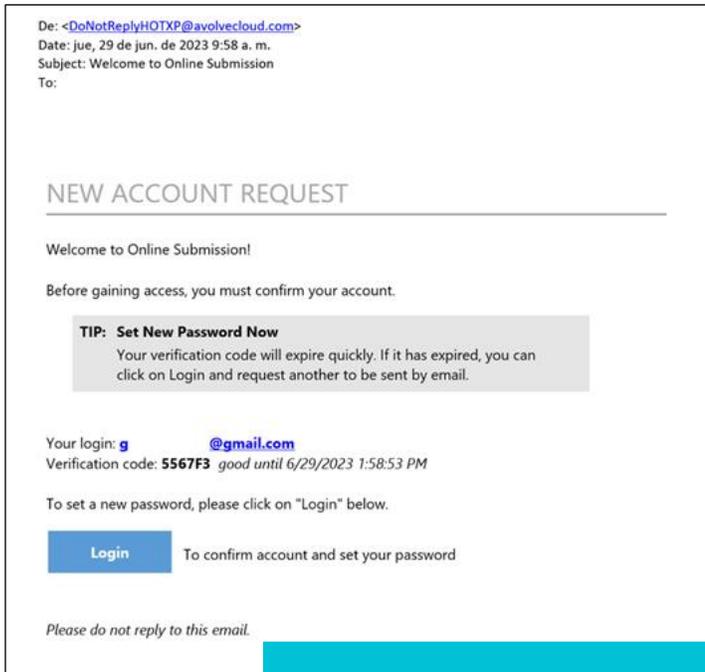
I hereby certify that all of the information provided in this application is true and correct to the best of my knowledge. If any information is found to be inaccurate, this application is subject to be voided and will require the submission of a new application including any applicable fees.

Finalize Application

ProjectDox Set Up

NEW USER ACCOUNT

An invitation will be sent to the applicant to upload plans into ProjectDox. For new users, the invitation will contain a temporary password. Subsequent invitations will not contain a password.



SAMPLE INVITATON

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. If no ProjectDox window appears, a pop-up blocker is likely still installed.
- 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.
- ProjectDox can be used in multiple browsers, including **Chrome, Safari, FireFox, Edge**. It can be used on Windows or Mac devices. However, ProjectDox behaves differently with each browser and works best with Edge.

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 the provided verification code 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

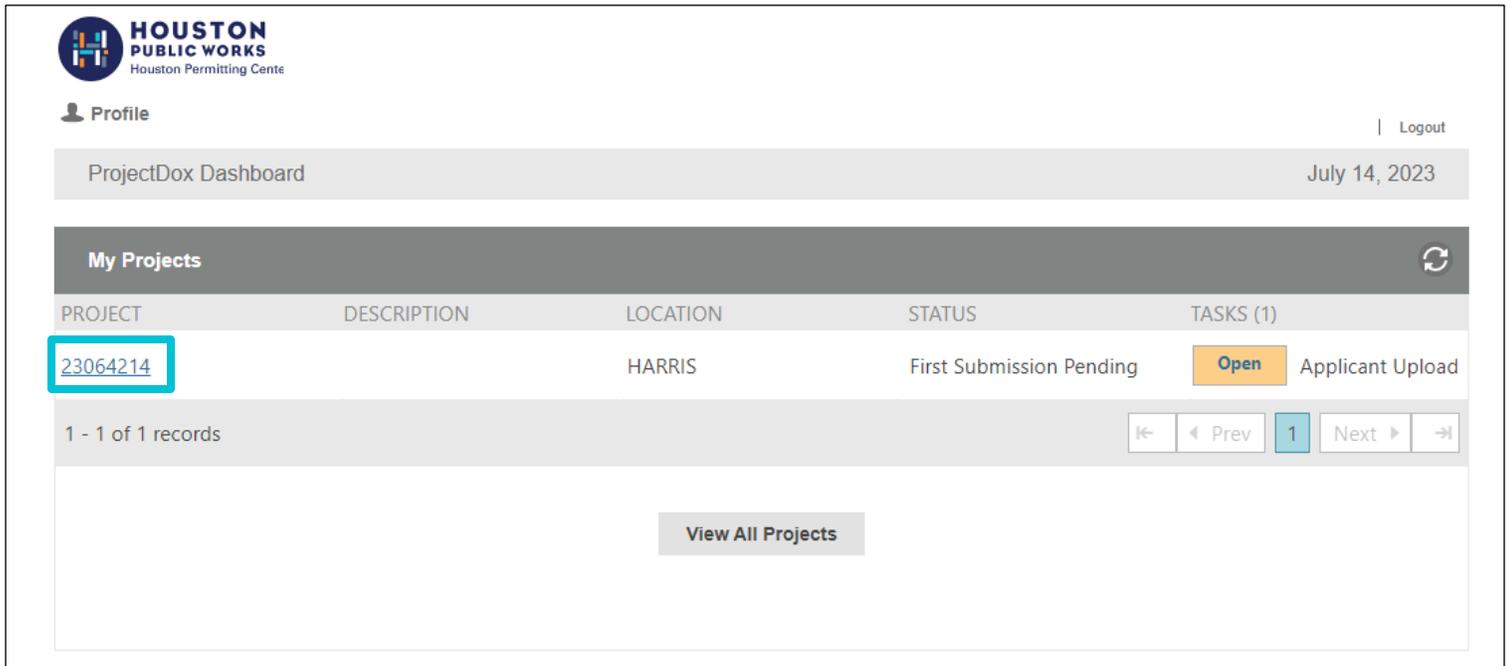
Click the **Save** button to continue onto the home page.

Login into ProjectDox® a second time (and every time after that); you will use the permanent password that you entered in your Profile page.

If you ever forget your password, click on the **Forgot Your Password?** link. You will input your email address and a verification code will be emailed.

Navigation Basics

HOME PAGE LAYOUT



The screenshot displays the ProjectDox Dashboard interface. At the top left is the Houston Public Works logo and the text "Houston Permitting Centre". Below this is a "Profile" link and a "Logout" link. The main header area shows "ProjectDox Dashboard" and the date "July 14, 2023". A "My Projects" section contains a table with the following data:

PROJECT	DESCRIPTION	LOCATION	STATUS	TASKS (1)
23064214		HARRIS	First Submission Pending	Open Applicant Upload

Below the table, it indicates "1 - 1 of 1 records" and provides navigation controls: a left arrow, a "Prev" button, a selected "1" button, a "Next" button, and a right arrow. A "View All Projects" button is located at the bottom center of the table area.

Once projectdox user profile has been updated the applicant will be direct to the ProjectDox dashboard screen. All projects affiliated with the projectdox account will be displayed. To continue to the projectdox home screen select the desired project number.

Navigation Basics

HOME PAGE LAYOUT

The screenshot displays the ProjectDox homepage interface. At the top left is the Houston Public Works logo. A navigation bar includes a Home button, a search field labeled 'Project: Enter project name', and an 'All Tasks' button. Below this are 'Tasks' and 'Projects' tabs. The main content area features a table with columns: ACTION, PROJECT, LOCATION, DESCRIPTION, OWNER, STATUS, and CREATE DATE. A single record is shown for project 20096738, titled 'ELECTRIC LOCKS PLAN REVIEW' with status 'Corrections Requested'. Navigation controls like 'All', 'Recent', and 'Show 24 records' are visible above the table.

ACTION	PROJECT	LOCATION	DESCRIPTION	OWNER	STATUS	CREATE DATE
	20096738		ELECTRIC LOCKS PLAN REVIEW	Commercial Building	Corrections Requested	8/23/21 9:14 AM

SAMPLE PROJECDOX HOMEPAGE

The ProjectDox® home page is divided into two main sections. The Projects section is your **Projects tab**, which displays basic information about every project you have been invited into as a main applicant and as a project member.

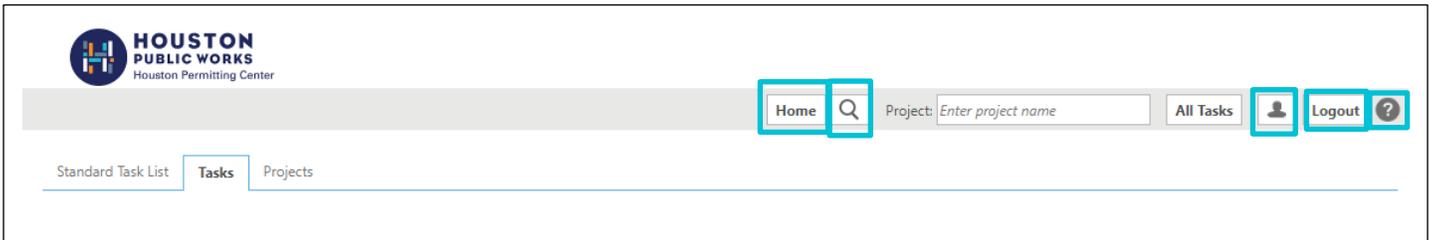
The most recently accessed projects are listed, with the most recent at the top. Select the **All** button to view a list of all your projects.

The **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 **Tasks** section of the home page is your **All Tasks**, which displays all your outstanding tasks on projects for which you are the main applicant. Tasks can be sorted by clicking on the column header. Both the **Projects** List and **Tasks** List are set to display a limited number of entries at a time. Use these buttons

Navigation Basics

HOME PAGE LAYOUT



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

- The **Home** 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 **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 **All Tasks** button shows any tasks requiring action from the applicant in a separate pop-up window.

The screenshot shows the 'Projects' tab selected in the navigation bar. A callout box on the right lists actions available from the Projects tab: View Pending Tasks, Project Status, Project Reports, Project Info, and View Uploaded files (Files can also be uploaded through this screen). A red arrow points from the callout box to the 'Projects' tab. Below the navigation bar, there are buttons for 'Refresh' and 'Save Settings'. A table displays project information with columns for ACTION, PROJECT, LOCATION, DESCRIPTION, OWNER, STATUS, and CREATE DATE. The first row shows a project with ID 20096738, description 'ELECTRIC LOCKS PLAN REVIEW', owner 'Commercial Building', status 'Corrections Requested', and create date '8/23/21 9:14 AM'. A red box highlights the icons in the ACTION column. At the bottom, there is a pagination bar showing '1 - 1 of 1 records' and navigation buttons.

ACTION	PROJECT	LOCATION	DESCRIPTION	OWNER	STATUS	CREATE DATE
	20096738		ELECTRIC LOCKS PLAN REVIEW	Commercial Building	Corrections Requested	8/23/21 9:14 AM

Standards

FILE TYPES

Prior to upload, 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.

Note: Drawings should be uploaded in landscape mode.

All drawings should be uploaded as single-page files into the Drawings folder for each project. (ex: 20 electrical pages = 20 files in the electrical drawings sub-folder).

All documents (any non-drawing files, geotechnical reports, etc.) should be uploaded as multi-page files into the appropriate Documents sub-folders.

Drawing Types	Discipline	Sheet No.	Example
Index	I	001-999	I.001 SHEET INDEX
General	G	001-999	G.001 GENERAL NOTES
Electronic Locks	EL	001-999	EL.001 PERMIT DRAWINGS

All files names are limited to 70 characters.

File names for drawings should include the first character of the discipline name, followed by the 3-digit sheet number. If decimals are needed in the sheet number, place a decimal after the 3rd digit, for example: **EL.01.FIRST FLOOR**

Corrected files should always be resubmitted with the **SAME FILE NAME** as the original submittal. Also, all **CAPS** on naming files.

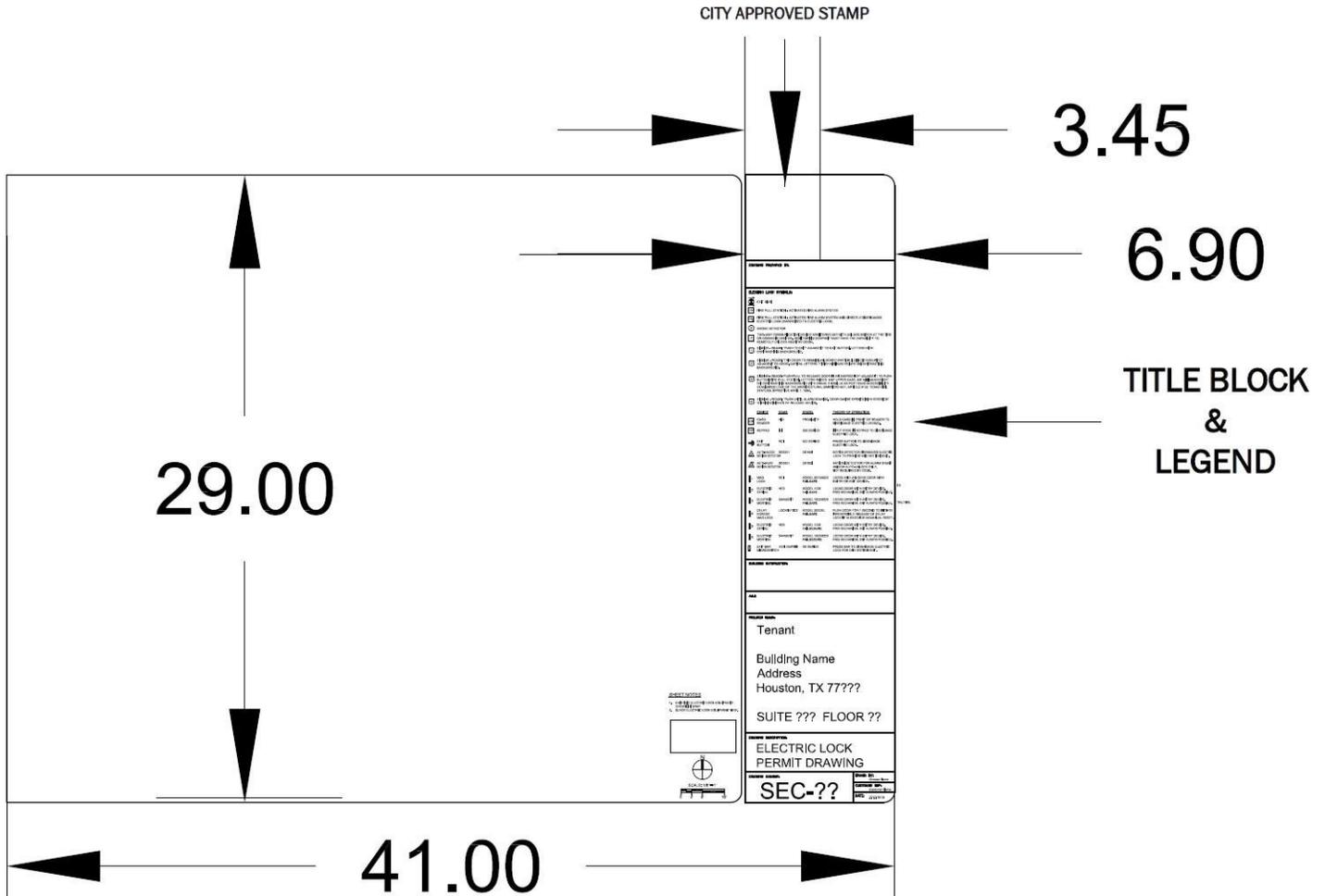
Note: If this is not followed the submittal file will appear as a NEW file, and not a correction to an existing file

Standards

FILE TYPES

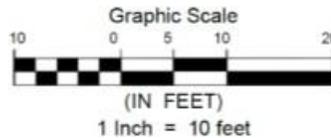
42"x30" overall with 1/2" clear border

EXAMPLE PLAN SIZE:



GRAPHIC SCALE

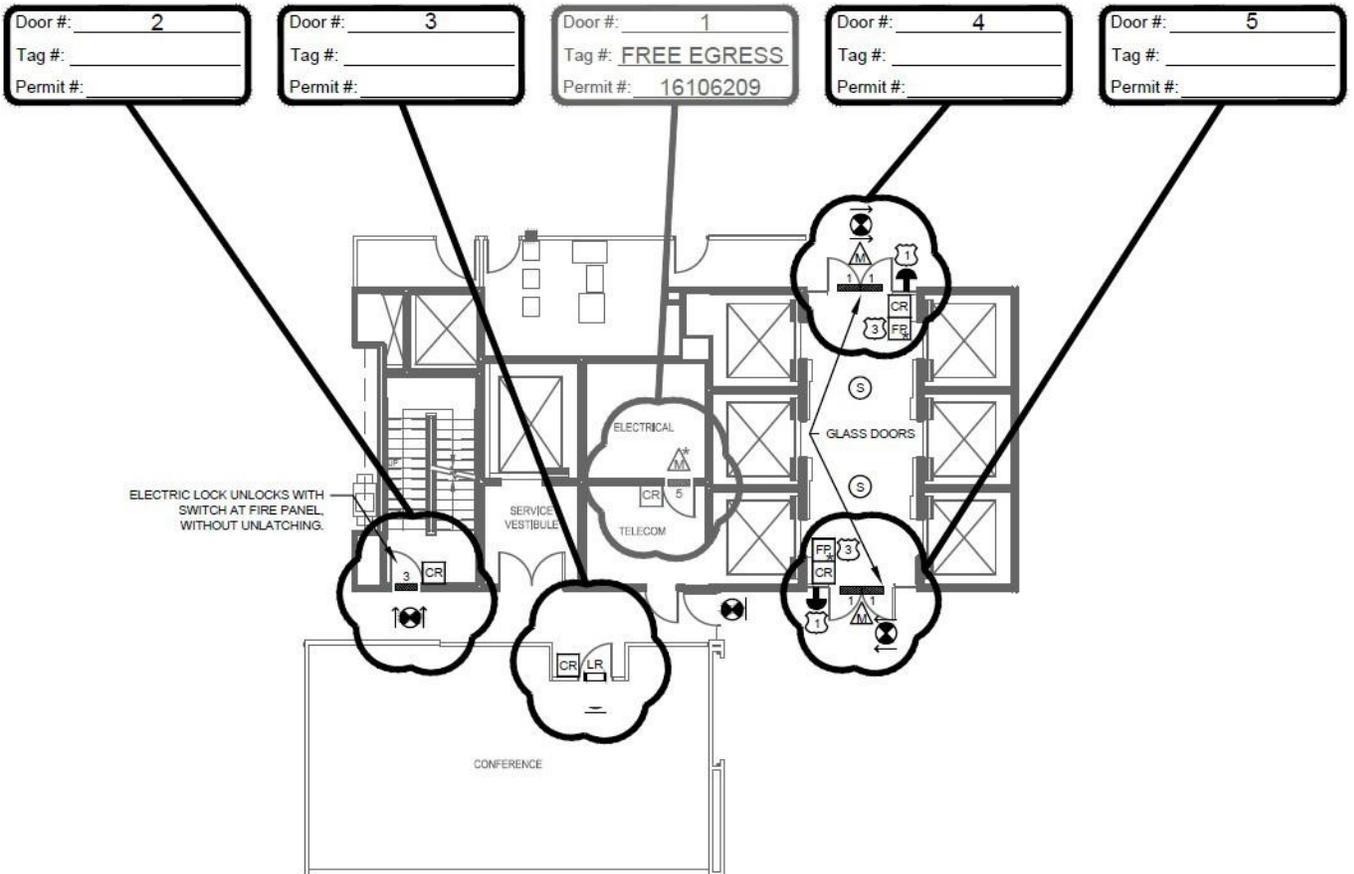
- Each sheet must have a typical graphic scale as shown in the image to the right.
- When more than one scale is used on a sheet, an independent graphic scale must accompany the applicable detail.
- All plans must be drawn to scale.



Standards

ELECTRONIC LOCK PLAN

EXAMPLE:



Note: The partial floor plan is for illustrative purposes only. All plans submitted for an electronic lock permit shall include the complete floor plan with all doors, room names, elevator lobbies, and all proposed and/or existing exit signs delineating the paths of egress travel to the stairways and exits.

Standards

SYMBOL LEGEND AND HARDWARE SCHEDULE

EXAMPLE

SYMBOL LEGEND AND HARDWARE SCHEDULE

ELECTRIC LOCK SYMBOLS:

 EXIT SIGN

 FIRE PULL STATION - ACTIVATES FIRE ALARM SYSTEM

 FIRE PULL STATION - ACTIVATES FIRE ALARM SYSTEM AND DIRECTLY DISENGAGES ELECTRIC LOCK (HARDWIRED TO ELECTRIC LOCK)

 SMOKE DETECTOR

 TWO-WAY COMMUNICATION DEVICE MONITORED 24/7 WITH UNLOCK SWITCH AT THE FIRE OR COMMAND CENTER. MONITORING COMPANY MUST HAVE THE CAPABILITY TO REMOTELY UNLOCK REENTRY DOOR.

 SIGN #1 - READS: "PUSH TO EXIT" ADJACENT TO EXIT BUTTON. LETTERS WITH CONTRASTING BACKGROUND. LETTERS RAISED 1/32" UPPER CASE, 5/8" MINIMUM HEIGHT ON CONTRASTING BACKGROUND WITH GRADE 2 BRAILLE AS PER TEXAS ACCESSIBILITY STANDARDS (TAS)

 SIGN #2 - READS: "THIS DOOR TO REMAIN UNLOCKED WHEN BUILDING IS OCCUPIED" ADJACENT TO DOOR. CAPITAL LETTERS 1" INCH MINIMUM HEIGHT ON CONTRASTING BACKGROUND.

 SIGN #3 - READS: "PUSH/PULL TO RELEASE DOOR IN AN EMERGENCY" ADJACENT TO PUSH BUTTON/FIRE PULL STATION. LETTERS RAISED 1/32" UPPER CASE, 5/8" MINIMUM HEIGHT ON CONTRASTING BACKGROUND WITH GRADE 2 BRAILLE AS PER TEXAS ACCESSIBILITY STANDARDS (TAS)

 SIGN #4 - READS: "PUSH UNTIL ALARM SOUNDS. DOOR CAN BE OPENED IN 15 SECONDS" WITHIN 12 INCHES OF RELEASE DEVICE. LETTERS RAISED 1/32" UPPER CASE, 5/8" MINIMUM HEIGHT ON CONTRASTING BACKGROUND WITH GRADE 2 BRAILLE AS PER TEXAS ACCESSIBILITY STANDARDS (TAS)

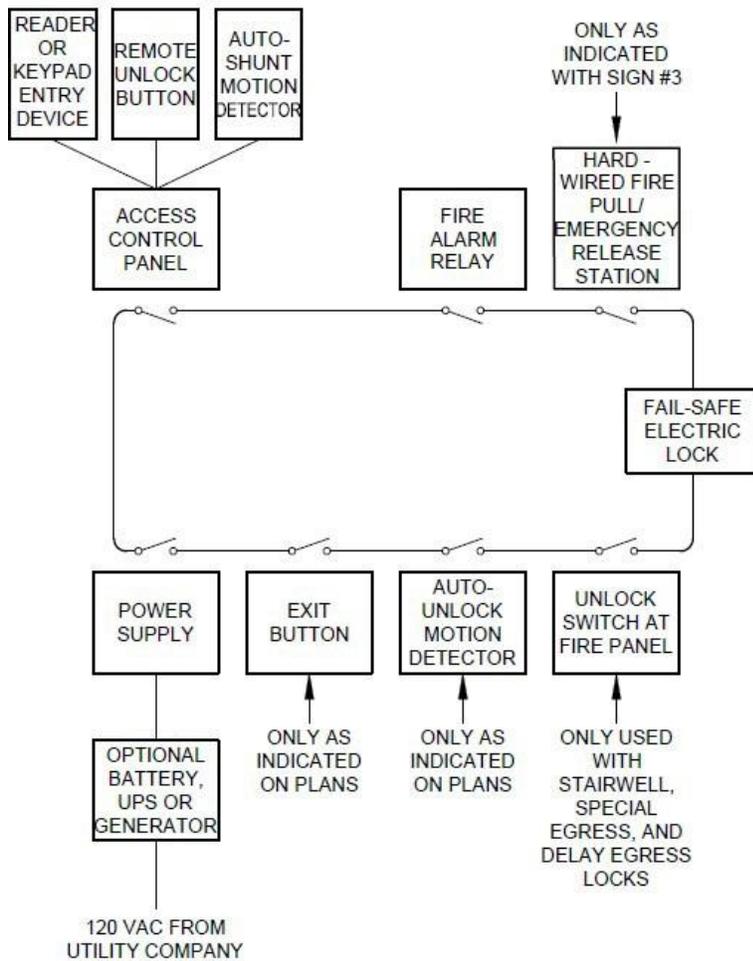
 SIGN #5 PUSH/LIFT TO CALL FOR RE-ENTRY. LETTERS RAISED 1/32" UPPER CASE, 5/8" MINIMUM HEIGHT ON CONTRASTING BACKGROUND WITH GRADE 2 BRAILLE AS PER TEXAS ACCESSIBILITY STANDARDS (TAS)

	<u>DEVICE</u>	<u>MAKE</u>	<u>MODEL</u>	<u>THEORY OF OPERATION</u>
	CARD READER	HID	PROXIMITY	HOLD CARD IN FRONT OF READER TO DISENGAGE ELECTRIC LOCK(S).
	KEYPAD	IEI	232 SERIES	INPUT CODE IN KEYPAD TO DISENGAGE ELECTRIC LOCK.
	EXIT BUTTON	RCI	900 SERIES	PRESS BUTTON TO DISENGAGE ELECTRIC LOCK.
	AUTO-UNLOCK MOTION DETECTOR	BOSCH	DS150i	MOTION DETECTOR DISENGAGES ELECTRIC LOCK TO PROVIDE ONE MOTION EXIT.
	AUTO-SHUNT MOTION DETECTOR	BOSCH	DS150i	MOTION DETECTOR FOR ALARM SHUNT AND/OR AUTO-UNLOCK ONLY, NOT REQUIRED BY CODE.
	MAG LOCK	RCI	MODEL 8310/8320 FAILSAFE	LOCKS AND UNLOCKS DOOR WITH ENTRY OR EXIT DEVICE.
	ELECTRIC STRIKE	HES	MODEL 1006 FAILSAFE	LOCKS DOOR WITH ENTRY DEVICE. FREE MECHANICAL EXIT ALWAYS POSSIBLE.
	ELECTRIC MORTISE	SARGENT	MODEL 7800/8200 FAILSAFE	LOCKS DOOR WITH ENTRY DEVICE. FREE MECHANICAL EXIT ALWAYS POSSIBLE.
	DELAY EGRESS MAG LOCK	LOCKNETICS	MODEL 390DEL FAILSAFE	PUSH DOOR FOR 1 SECOND TO INITIATE IRREVERSIBLE RELEASE OF DELAY LOCK IN 15 SECONDS W/MANUAL RESET.
	ELECTRIC STRIKE	HES	MODEL 1006 FAILSECURE	LOCKS DOOR WITH ENTRY DEVICE. FREE MECHANICAL EXIT ALWAYS POSSIBLE.
	ELECTRIC MORTISE	SARGENT	MODEL 7800/8200 FAILSECURE	LOCKS DOOR WITH ENTRY DEVICE. FREE MECHANICAL EXIT ALWAYS POSSIBLE.
	EXIT BAR MICROSWITCH	VON DUPRIN	RX SERIES	PRESS BAR TO DISENGAGE ELECTRIC LOCK FOR ONE MOTION EXIT.

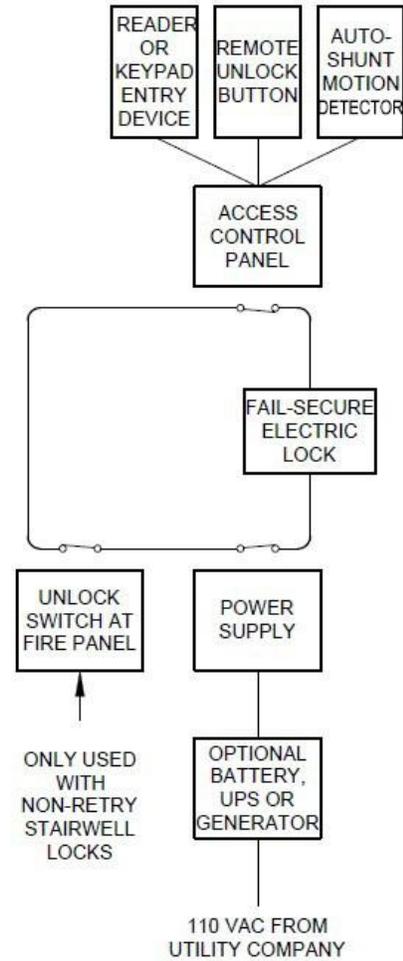
Standards

ONE-LINE FAIL SAFE DIAGRAM MAGNETIC LOCK ONLY

EXAMPLE:



A FAILSAFE ELECTRIC LOCKS

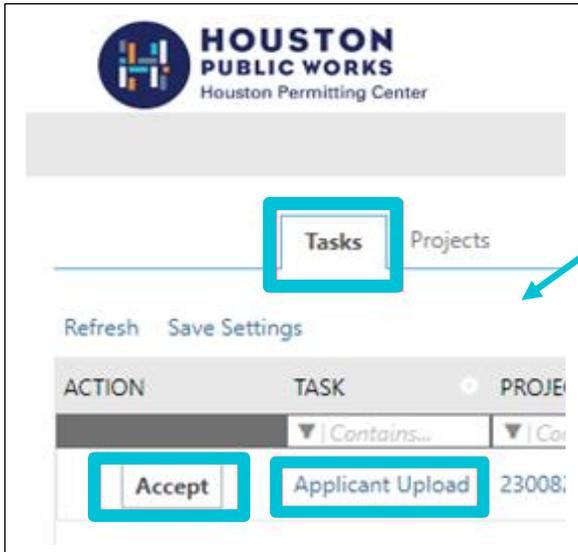


B FAILSECURE ELECTRIC LOCKS

ONE-LINE DIAGRAMS

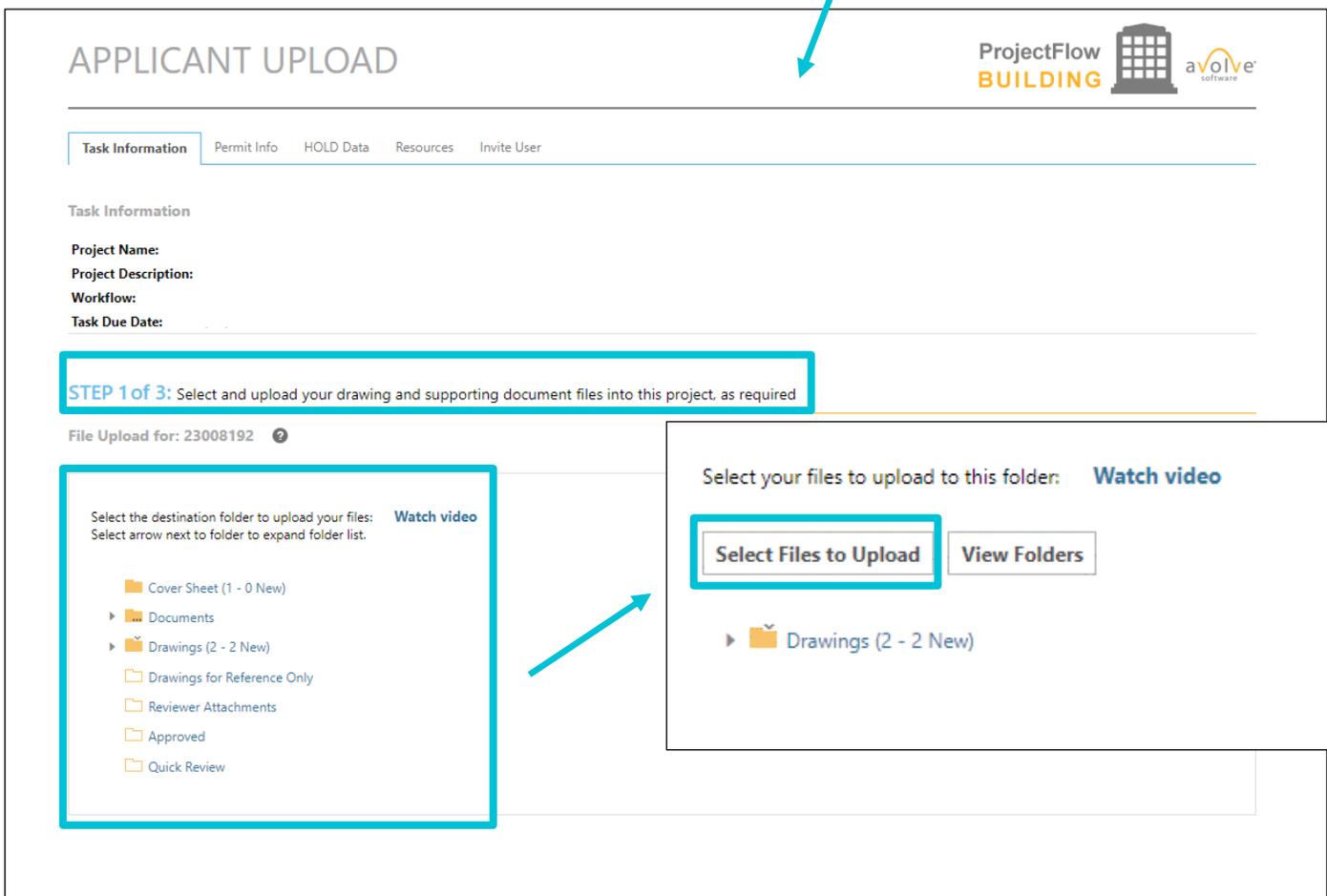
Upload Your Files

FIRST SUBMISSION



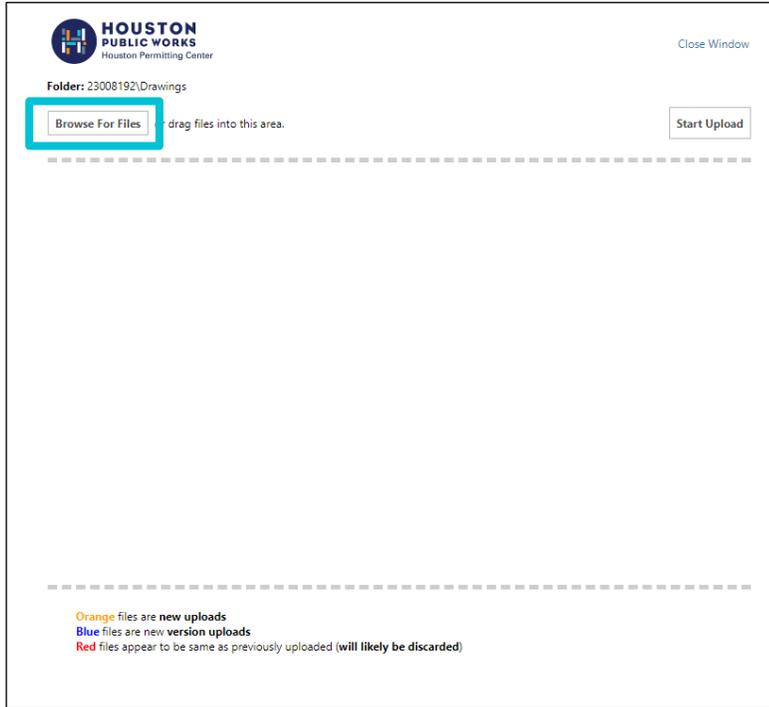
On your Projectdox Home Page click on the **Tasks** tab and click on **Accept or Applicant Upload**.

The eForm window will open in a pop-up screen. From there the applicant may select and upload drawings and supporting documents into the project



Upload Your Files

FIRST SUBMISSION

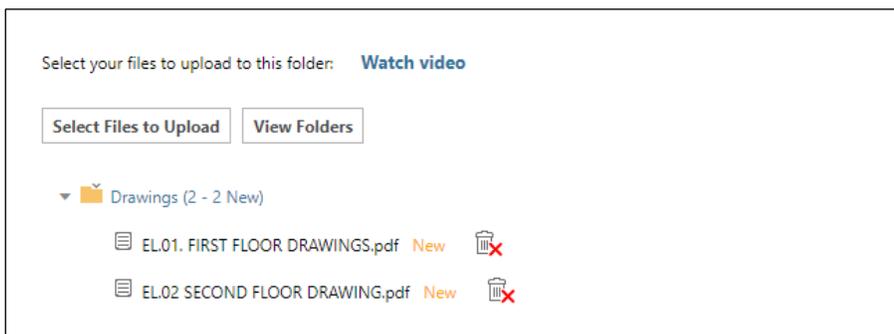


By default, up to 200 files or 10GB, whichever comes first can be uploaded at the same time.

Click **Browse for Files** or Drag files into the Upload window.

Once all files have been selected or dragged, Click **Start Upload**.

To upload files into a different folder, repeat the process until all drawings and documents are uploaded into their respective folders.



Upload Your Files

FIRST SUBMISSION

HOUSTON PUBLIC WORKS
Houston Permitting Center

Home Project: All Tasks Logout

Tasks Files Status Info Reports Discuss Reviews **20096738: ELECTRIC LOCKS PLAN REVIEW** Main Contact: PROJECTDOX TESTER1 PROJECT

Refresh

Upload Files 2 of 2 files (0 selected)

FILE NAME	STATUS	REVIEWED	UPLOADED	DATE
▼ Contains...	▼ Contains...	▼	▼ Contains...	▼ On...
<input type="checkbox"/> 16_04_c_comm_stucco_details.pdf				8/23/21 9:10 A
<input type="checkbox"/> EL01. FIRST FLOOR DRAWINGS.pdf	New			6/1/23 9:53 AM

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

If a file is uploaded into the wrong folder, select the check box next to the file name and then select the delete icon.

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

To upload files into another folder, click on the folder. Repeat the process until all drawings and documents are uploaded into their respective folder.



Reports Discuss Reviews **20096738: ELECTRIC LOCKS PLAN REVIEW**

2 of 2 files (1 selected)

FILE NAME
▼ Contains...
<input checked="" type="checkbox"/> 16_04_c_comm_stucco_details.pdf
<input type="checkbox"/> EL01. FIRST FLOOR DRAWINGS.pdf

Completing the Submittal

APPLICANT UPLOAD

ProjectDox® moves a project through a series of tasks called a workflow. Some of these tasks are assigned to the applicant and others to City 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 City of Houston that your plans are ready for pre-screen, the applicant must complete the **ApplicantUpload** task.

From the **eForm** where plans were uploaded, the applicant will need to check to confirm all required documents and/or drawings have been uploaded.

The screenshot displays the 'APPLICANT UPLOAD' interface. At the top, there are logos for 'ProjectFlow BUILDING' and 'aVolve software'. Below the title, there are tabs for 'Task Information', 'Permit Info', 'HOLD Data', 'Resources', and 'Invite User'. The 'Task Information' tab is active, showing project details: Project Name: 23008192, Project Description: TEST 9.2, Workflow: Commercial-Residential Workflow, and Task Due Date: 6/12/23 2:38 PM.

The main content area is divided into three steps:

- STEP 1 of 3:** Select and upload your drawing a... (partially visible)
- STEP 2 of 3:** Check all to confirm you have completed this task and are now ready to submit. This step includes a 'Confirmation' section with a red error message: 'Selection is required.' and a checked checkbox: 'I have uploaded all required drawings and/or documents.'
- STEP 3 of 3:** Click the "Submit" button below to complete your task.

At the bottom right, there are two buttons: 'Submit' and 'Complete Later'. The 'Submit' button is highlighted with a red box. A red arrow points from the 'Submit' button in the bottom right to the 'Submit' button in the bottom left, indicating the final step of the process.

Completing the Submittal

APPLICANT UPLOAD

Through the eForm, the main applicant can invite individuals into the project. Enter the individual's name and email address and then click on the Invite user. 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 notification that the main applicant receives as the project moves through the workflow.

The screenshot displays the 'APPLICANT UPLOAD' interface. At the top right, there are logos for 'ProjectFlow BUILDING' and 'avolve SOFTWARE'. A navigation bar contains tabs for 'Task Information', 'Permit Info', 'HOLD Data', 'Resources', and 'Invite User', with 'Invite User' highlighted by a red box. Below the navigation bar, the 'Task Information' section shows: Project Name: 23008192, Project Description: TEST 9.2, Workflow: Commercial-Residential Workflow 2, and Task Due Date: 6/12/23 2:38 PM. A red arrow points from the 'Invite User' tab to a modal window titled 'Invite/Remove Project User'. This modal has a red border and contains a dropdown menu for 'Invite to Group' (set to 'Owner_Agent_Contractors'), input fields for 'First Name', 'Last Name', and 'Applicant Email', and an 'Invite User' button. To the left of the modal, a file upload section is visible, showing a folder tree with options like 'Cover Sheet', 'Documents', 'Drawings', 'Reviewer Attachments', 'Approved', and 'Quick Review'. Below the file upload section, there is a 'Confirmation' section with a red error message 'Selection is required.' and a checkbox for 'I have uploaded all required drawings and/or documents.' At the bottom, 'STEP 3 of 3' instructions are provided.

Pre-Screen Review

PROCESS OVERVIEW

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

If you have met the submittal requirements, you will receive a **Prescreen Approved** email and your submittal is ready for the formal review process. The City's Review Coordinator (RC) group will assign the formal review to all required disciplines and departments.

If items are missing or corrections are required, a **Corrections Complete** task notification will be emailed to you with instructions on how to resubmit to fix the issues.

The permit tech can provide information about the submittal issues or add comments to the check list and can also attach supporting documents for you to review.



HOUSTON PUBLIC WORKS
Houston Permitting Center

PreScreen Correction Resubmit Request Task Assignment

Attention SAMUEL:

Your plan review submission for Project: **22053815** has not met the minimum requirements for acceptance. You may review correction comments and requirements by accessing the ProjectDox site.

When corrected plans and/or documents are ready for re-submittal, please [Login to ProjectDox](#) and follow the instructions provided for re-submittal.

Please be advised when re-submitting plans and/or documents:

- All corrections must be uploaded using the same file names as the original submittal
- Once corrections have been uploaded for review, no additional submissions will be accepted unless requested
- Please make corrections within 180 days of this notice to prevent your application from expiring.

Project:	
Description:	INSTALL STAND-BY GENERATOR
Task:	Prescreen Resubmit
Project Access Login to ProjectDox	

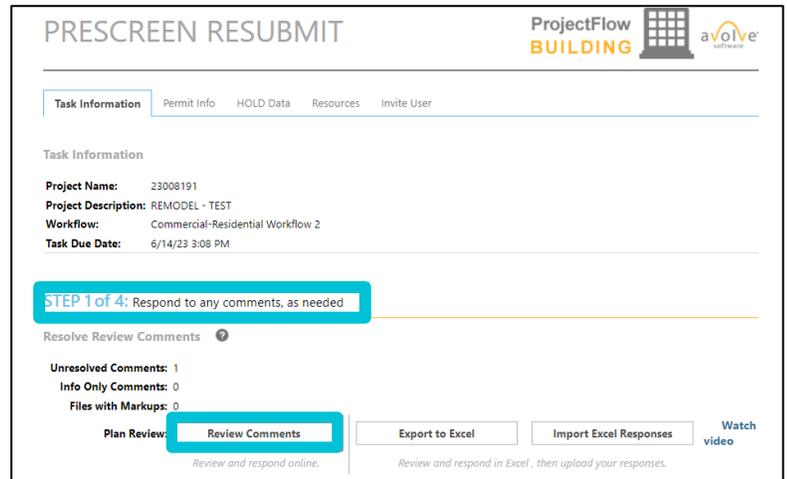
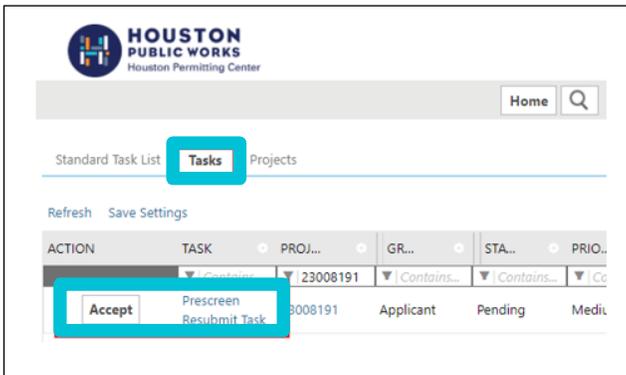
SAMPLE PRESCREEN CORRECTION EMAIL

Pre-Screen Review

CORRECTION COMPLETE TASK

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

- Log into ProjectDox® or click on the Project Access button directly from your email.
- Select **Task** button, then click on **Accept**.
- Click on **Review Comments** to display the Review coordinators comments. There the applicant may view and respond to requested corrections.



“**Versioned Files**”- New version of a file previously submitted.

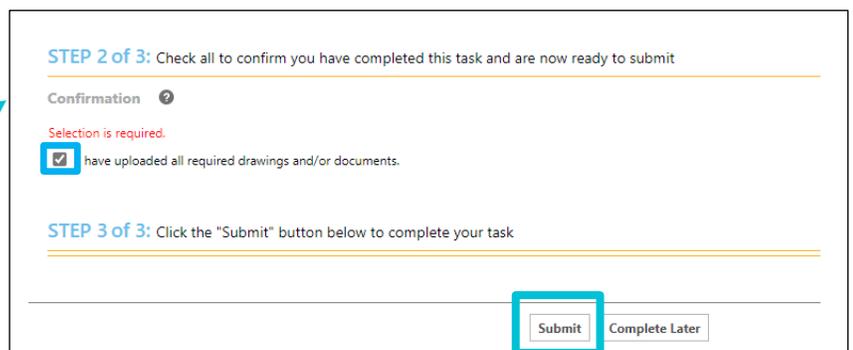
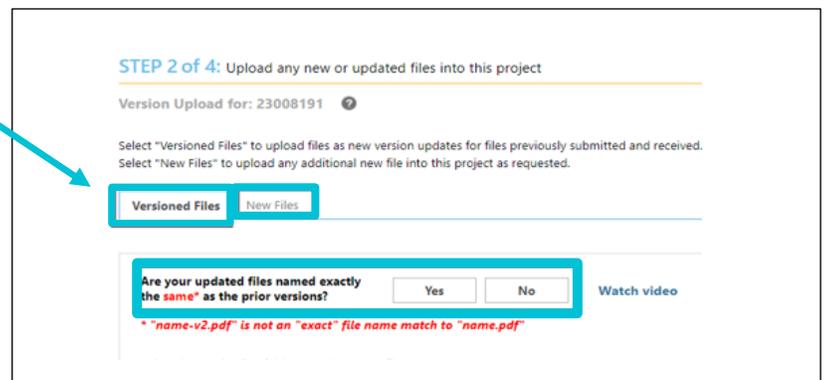
“**New Files**”- New file, not previously uploaded and submitted.

If you are uploading versioned files, Answer the following question...

If **Yes**, follow the same procedures as the initial upload. Projectdox will rename the file upon upload as version of the original file.

If **No**, select the file that will be a new version of the existing file. Upon upload Projectdox will rename the file for you with the same name.

Once all requested corrections are completed, the applicant will need to check all to confirm responded to the prescreen request. Click Submit to complete the task and submit project for review.



Review of Plans

PROCESS OVERVIEW

Once the project has passed the Pre-Screen requirements, the City’s Review Coordinator (RC) group assigns the formal review to all required disciplines and departments. Each assigned department may approve or reject their review, and may add a status, check list comments, free form comment and/or change mark to the drawings.

Once all assigned departments have completed their review, the RC notifies the applicant whether the plan review is approved, or corrections are required. If all reviews have been approved, Review QA Coordinator applies the final City of Houston approval stamp, and the applicant will receive an **Approved** email with instructions. If at least one reviewer has selected “Rejected,” the applicant will receive an email notification of the **Applicant Resubmit** task with instructions on how to resubmit to fix the issues.

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

1. Log in to ProjectDox®.
2. From the Home page select **Task** bar
 - a) This can be done from the respond and resubmit email sent to applicant.
3. Click on **Review Comments**:
 - a) Applicants may review provided comments and provide responses as required.
 - b) Ensure that responses have been provided in applicant response column

RESPOND AND RESUBMIT

Task Information | Review Results | Invite Others

Task Information

Project Name: [Redacted]
Project Description: Rev
Coordinator: Mara Fitter
Review Cycle: 2
Workflow: WST Building Workflow - Optional Reviews
Current User Login: Mara Fitter (mfitter@avolvesoftware.com)
Task Due Date: 4/5/22 1:48 PM

Task Instructions | Watch Video

Please follow the steps below:

STEP 1 of 4: Respond to all comments, as requested

Resolve Review Comments ⓘ

Unresolved Comments: 4
Info Only Comments: 1
Files with Markups: 3

Plan Review: **Review Comments**

Review and respond online.

Export to Excel | **Import Excel Responses** | Watch Video

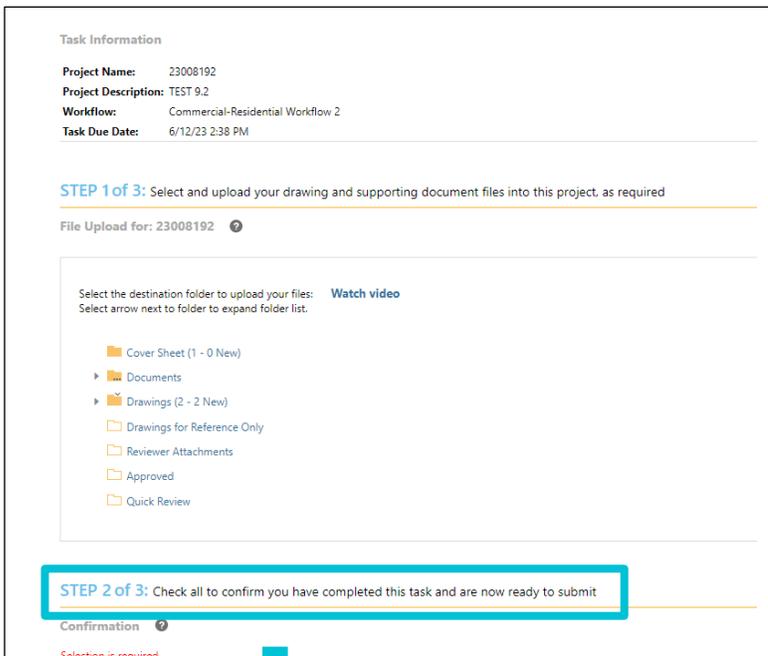
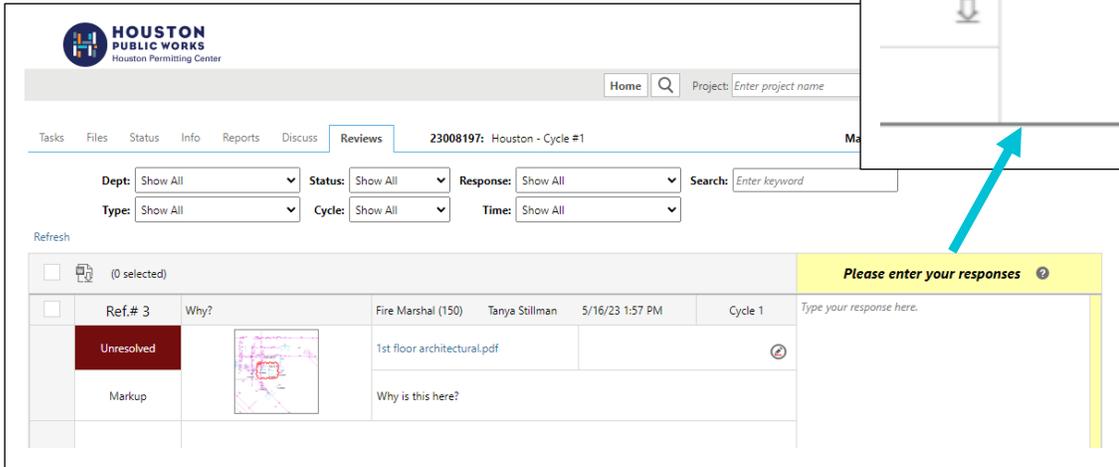
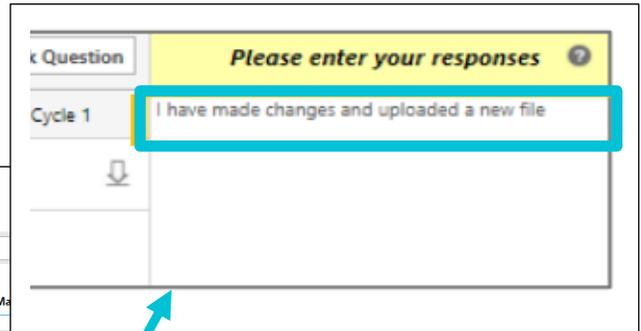
Review and respond in Excel, then upload your responses.

STEP 2 of 4: Upload any new or updated files into this project

Review of Plans

APPLICANT RESUBMIT TASK

- View the reviewer comments and markups
- Click on file name to open the drawing with markups
- Add your response in the Applicant Response column

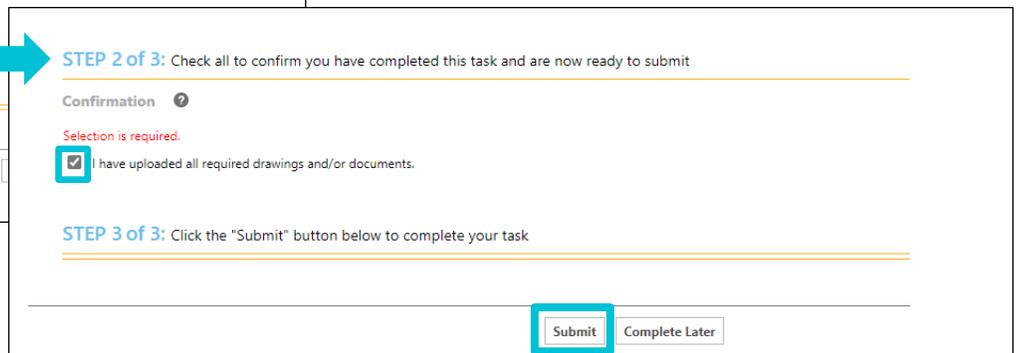


Confirm you have completed Task and are ready to submit.

- Check box "I have responded to all review comments."
- Check box "I have uploaded my revised files, if requested."

Select the Submit button to complete your task

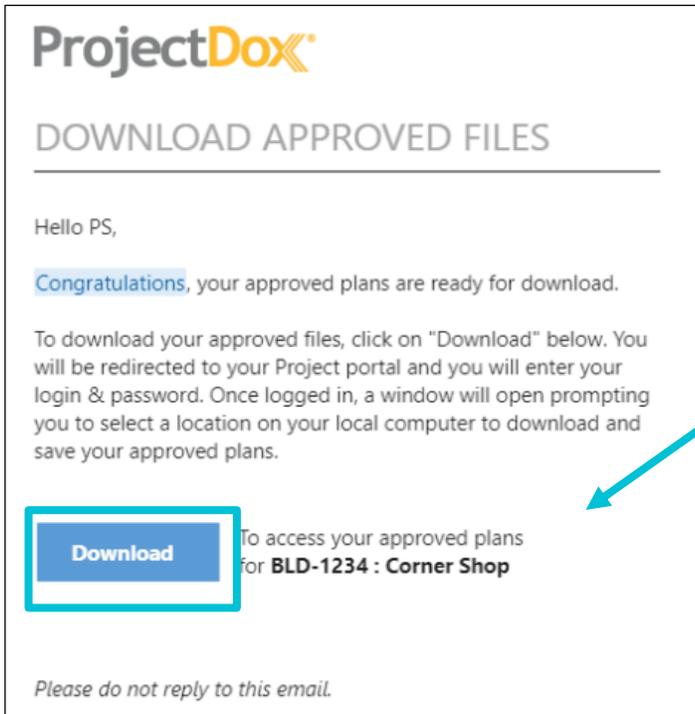
An email notification will be sent to the Review Coordinator assigning them to the step **Respond and Resubmit Received**. The Review Coordinator will confirm that plans have been uploaded and the appropriate departments are selected for assignment for the next review cycle.



Download Plans

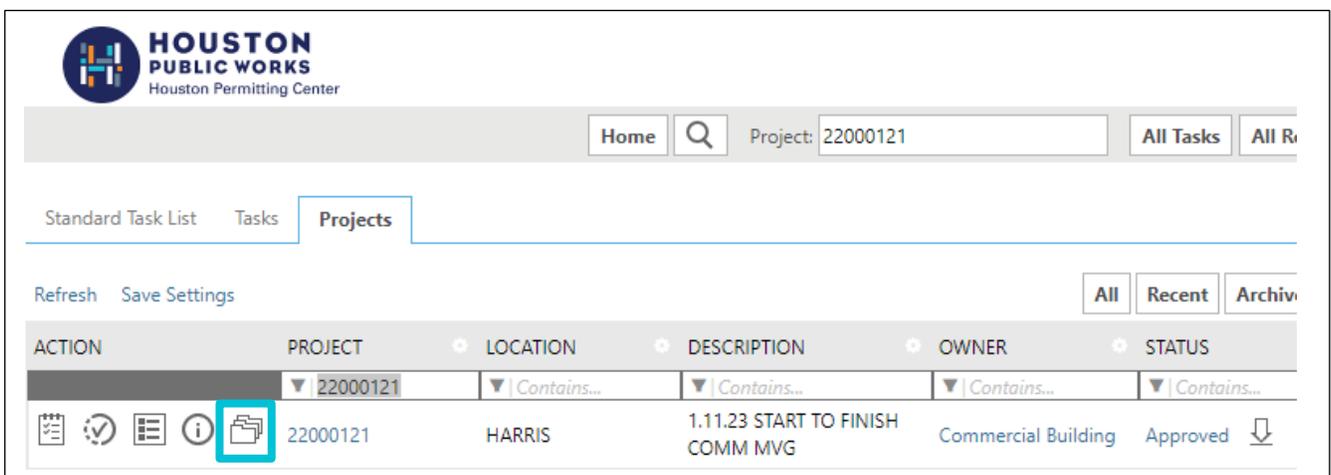
APPROVED PLAN SET

After the department has approved the review, each page of the approved plan set will be stamped with the City of Houston seal in red, and a cover sheet will be stamped by the reviewer. An email will be sent indicating the files are available for download in the **Approved** folder. It will also include the remaining balance due prior to scheduling an inspection.



To download: you may access through the email notification or from your projectdox account.

To Download your Approved Plans. Click on your  **Files** icon.

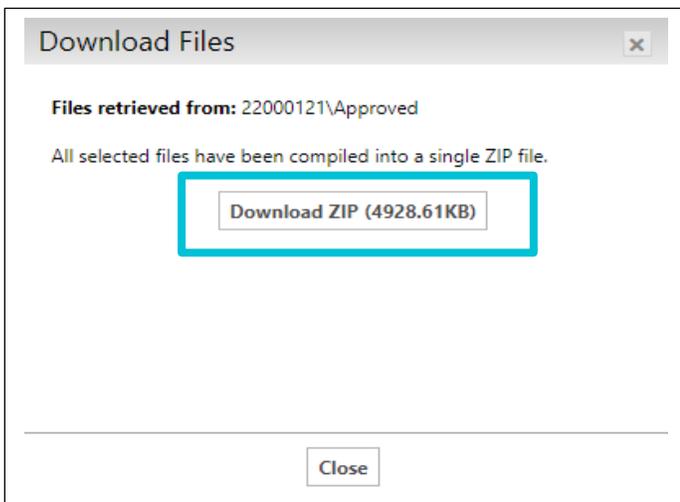
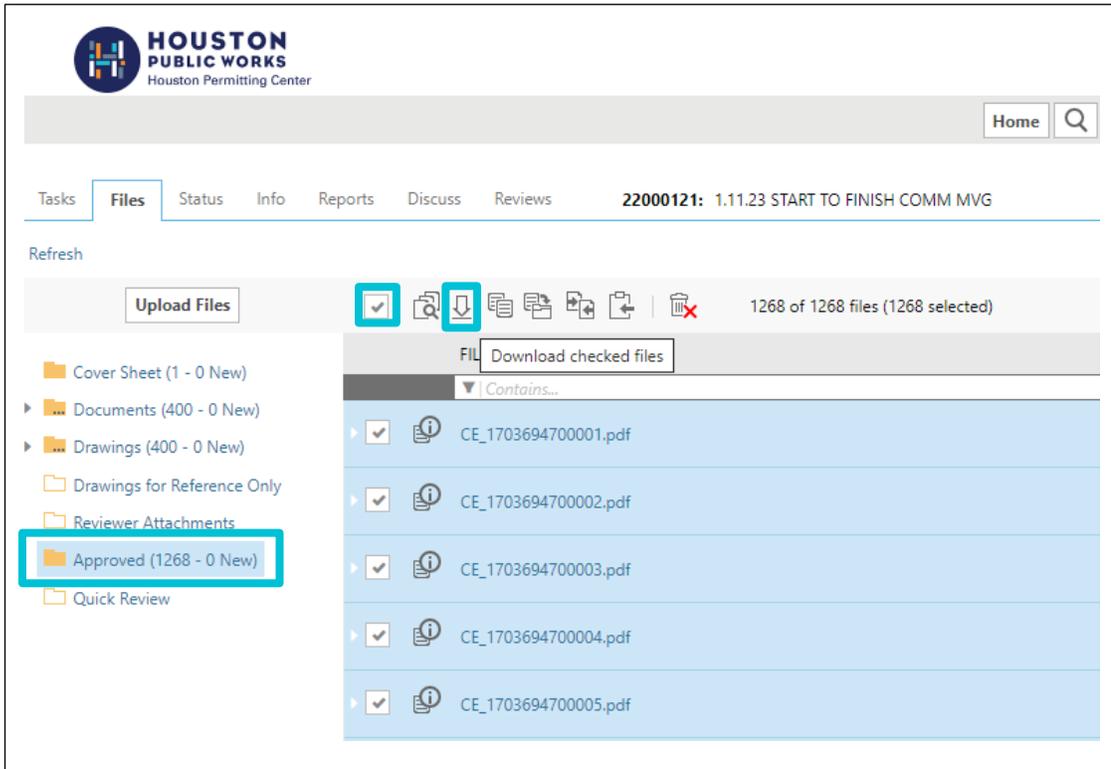


Download Plans

APPROVED PLAN SET

To download the entire folder, select the box at the top of the thumbnails. When your selection is complete, click on the download icon.

A single zip file will be created. 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.

Pay the Fees

CREDIT CARD OR E-CHECK

iPermits Shopping Cart Maintenance

Sales Order Payment Selection

Shopping Cart No: [Create a New ILMS Shopping Cart](#)
 Created: [Return to Shopping Cart List Maintenance](#)

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
<input checked="" type="checkbox"/> 03529488	Plan Review Deposit	25-JUN-2023	No Holds	911 WASHINGTON AVE # POST2	

Shopping Cart Amount Due : \$189.84

[Recalculate](#)

[View the payment transmittal](#)

[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. You will be taken to Chase website to complete the online payment.

If application needs to be updated, select sales order number and click **“Delete This Sales Order.”**

Processed payments are indicated by a project number in red

ILMS Shopping Cart Online Payment Processing

Payment Selection

Shopping Cart No: [Return to Shopping Cart Maintenance](#)
 Created:
 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

Last Name: First Name: Middle Name:

Billing Address:

House #: Fraction: Pre-Dir: Street Name:

Type: Space:

Billing Zip Code:

Zip code: Zip plus:

Shopping Cart Amount Due | \$189.84

[Update Payer Information](#)

[Continue the Credit Card/Electronic Check Payment Process](#)

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

You will be transferred to the J.P Morgan chase payment website to complete the transaction.

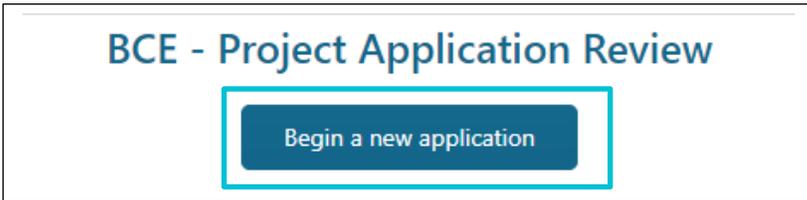
Plan Review Revision

APPLICATION PROCESS

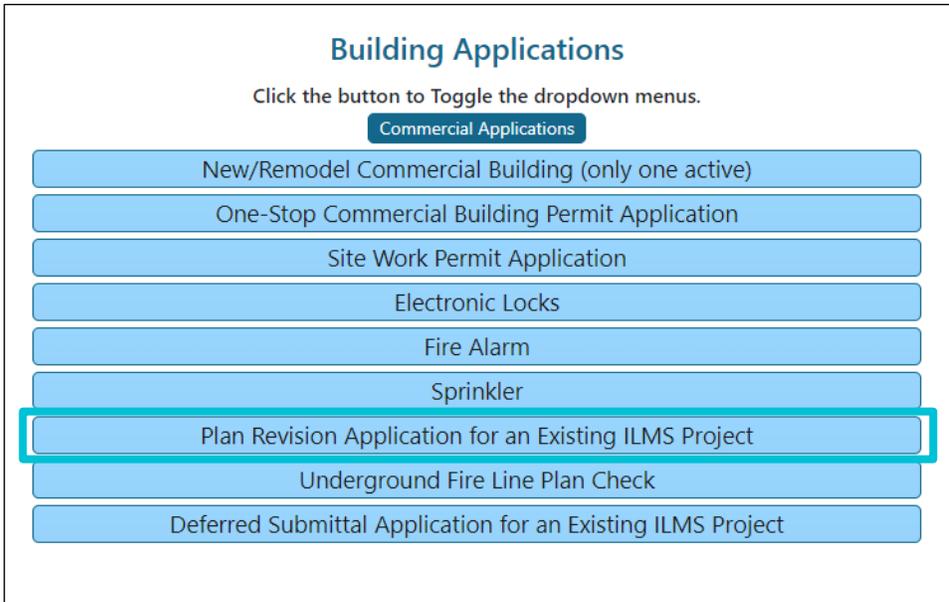
The process of setting up a revision is similar to setting up a new project on the iPermits Portal.



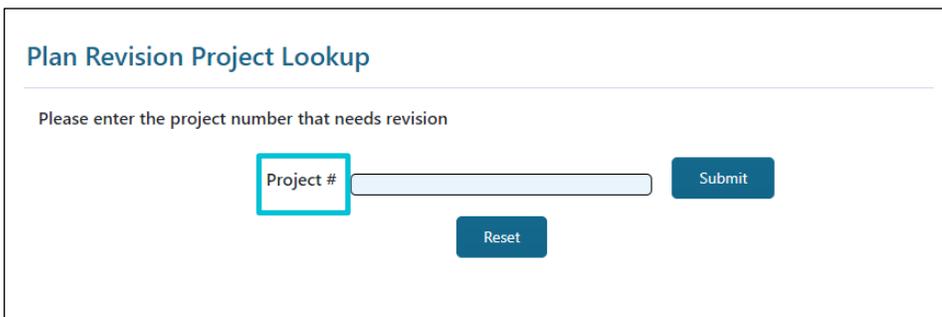
Logon to iPermits and click on **Building Permit Applications**.



On the next screen click on **Begin New Application**.



Click on **Commercial Applications**. From the list of available applications, please select the **“Plan Revision Application for an Existing ILMS Project”**.



Enter your project number of the plans you wish to submit for a revision.

Plan Review Revision

APPLICATION PROCESS

Plan Revision Project Verification

Please review and confirm this is the project requiring revision

Project Number: 23007437
Address: 911 WASHINGTON AVE # BLD 1
Description: NEW, SINGLE FAMILY RESIDENTIAL
Applicant Name: IPERMITS PORTAL, PROJECTDOX ILMS
Submittal(s): These plans were submitted: 01/24/2023
Approval Date: These plans were approved for permitting on: 01/24/2023
Plan Location: Plans were returned to applicant on 01/24/2023

Begin the plan revision project application process

Select the “Begin the plan revision project application process” button.

Residential Building Plan Review Revision Application

Project/Situs Information

Project Number: 23007437 Application Number: 00247321
Name on Situs: *TEST - NATOYA
Property Address: 911 WASHINGTON AVE # BLD 1
City/State/Zip: HOUSTON, TX 77002
Project Use: NEW, SINGLE FAMILY RESIDENTIAL
Estimated Valuation: \$0 Improvement Square Footage: 2,400

- Are you adding additional scope of work not originally covered in the project?
 Yes No
- Are you adding square footage to the original foot print or lease space?
 Yes No
- Are you adding any additional impervious cover above the originally approved design?
 Yes No
- Are you changing the original occupancy classification or use of the building?
 Yes No
- Is the revision limited to 1 or 2 trades and three or fewer sheets? If so, based on the fees paid to date, you qualify for a minimum fee review.
 Yes No
- Are you adding more than 15% (\$0) of additional cost valuation to the original cost of improvements
 Yes No

You qualify for a Project Revision.

Submit

Answer the following 6 questions to find out of you qualify for the revision.

If you answer “Yes” to any of the questions from 1 to 4 or 6, you do not qualify for a revision.

You will have to start a new building permit application for the proposed scope of work.

Plan Review Revision Payment

CREDIT CARD OR E-CHECK

iPermits Shopping Cart Maintenance

Sales Order Payment Selection

Shopping
Cart No:

03240071

Created:

06/27/2023

Create a New ILMS Shopping Cart

Return to Shopping Cart List Maintenance

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 email
03532221	Plan Review Deposit	27-JUN-2023	No Holds	911 WASHINGTON AVE #

Shopping Cart Amount Due : \$189.84

Recalculate

View the payment transmittal

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. You will be taken to Chase website to complete the online payment.

If application needs to be updated, select sales order number and click **“Delete This Sales Order.”**

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

You will be transferred to the J. P Morgan payment website to complete the transaction. A receipt will be emailed to you from J.P Morgan You may need to check your spam or junk folder.

ILMS Shopping Cart Online Payment Processing

Payment Selection

Shopping Cart No:

03240071

Created:

06/27/2023

Payment Processed:

Return to Shopping Cart Maintenance

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

Last Name First Name Middle Name

Billing Address:

House # Fraction Pre-Dir Street Name Type Space

Billing Zip Code: Zip code Zip plus

Shopping Cart Amount Due | \$189.84

Update Payer Information

Continue the Credit Card/Electronic Check Payment Process

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HOW TO RUN REPORTS ON PROJECTDOX

Step 1: Log in to your ProjectDox account and select the project number to run report.

The screenshot shows the Houston Public Works Houston Permitting Center interface. The 'Projects' tab is active. A table lists project details:

ACTION	PROJECT	LOCATION	DESCRIPTION	OWNER	STATUS	CREATE DATE
	20096738		ELECTRIC LOCKS PLAN REVIEW	Commercial Building	Corrections Requested	8/23/21 9:14 AM

Step 2: Click on the Reports tab. Click on the magnifying glass for the report your wish to run.

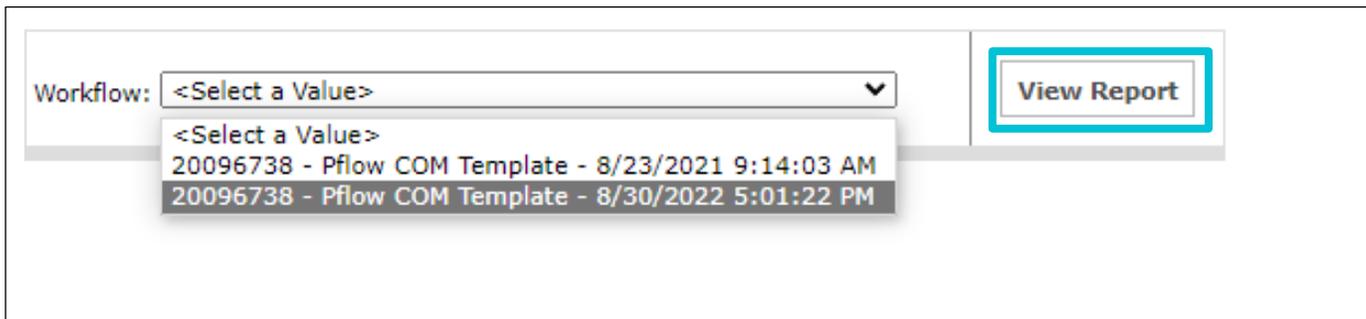
The screenshot shows the Houston Public Works Houston Permitting Center interface with the 'Reports' tab selected. The table lists various reports:

ACTION	REPORT NAME	REPORT TYPE	REPORT DESCRIPTION
	Current Project - All Emails Sent	Project	All template emails sent from within this project
	Current Project - All Group Users	Project	All project users listed by group and name
	Current Project - All Logged Events	Project	All logged events for a project between specified dates
	Current Project - All Uploaded Files with Sheet Sizes	Project	All uploaded files with sheet sizes within this project
	Current Project - Combined Discussions	Project	Project discussion comments, discuss file and workflow form discussions
	Current Project - Discussion Comments with All Participants	Project	Project discussion comments listing all topic participants
	Current Project - Unpublished Files	Project	All unpublished files within this project
	Current Project - User Activity History by Date	Project	All logged project events by a named user between specified dates
	Plan Review - Department Review Status	ProjectFlow	Status of departmental reviews for a specified workflow
	Plan Review - Discussion Board Plan Review	ProjectFlow	Discussions within workflow task forms used within this project
	Plan Review - Review Comments	ProjectFlow	Lists the review comments, checklist and changemark details for a workflow instance review cycles.
	Plan Review - Review Details	ProjectFlow	Displays the Workflow Routing Slip with a list of review comments
	Plan Review - Workflow Routing Slip	ProjectFlow	Displays the sequential routing and times for completed or current plan review tasks
	ProjectFlow - Department Review Status	ProjectFlow	Status of departmental reviews for a specified workflow
	ProjectFlow - Workflow Routing Slip	ProjectFlow	Displays the sequential routing and times for completed or current plan review tasks

Index

HOW TO RUN REPORTS ON PROJECTDOX

Step 3: Click on Drop Down arrow. Select the report and Click View Report.



The screenshot shows a web interface with a label 'Workflow:' followed by a dropdown menu. The dropdown menu is open, showing three options: '<Select a Value>', '20096738 - Pflow COM Template - 8/23/2021 9:14:03 AM', and '20096738 - Pflow COM Template - 8/30/2022 5:01:22 PM'. To the right of the dropdown is a button labeled 'View Report' with a blue border.

Example of report shown below

Plan Review - Workflow Routing Slip

Report Generated: **06/02/2023 09:50 AM**

Review Type: **Commercial and Residential Building Permit**
Number of Files: **5**
Project Name: **23008193**
Workflow: **23008193 - Pflow COM Template - 5/15/2023 3:48:30 PM**
Total Review Comments:

Time Elapsed: **13 days 18 hrs**
Time with Jurisdiction: **12 days 18.5 hrs**
Time with Applicant: **0 days 23.5 hrs**
Completed Submission (Prescreen): **0 days 23.5 hrs**
Completed Plan Review: **Not Completed**

TASK	TASK STATUS	REVIEW STATUS	CYCLE	ASSIGNED	ACCEPTED	COMPLETED	GROUP	USER
Applicant Upload	Completed		0	05/15/2023 03:48 PM	05/16/2023 03:07 PM	05/16/2023 03:07 PM	Applicant	Tanya Stillman



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Houston, Texas 77002

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elocks@houstontx.gov

www.houstonpermittingcenter.org