



# 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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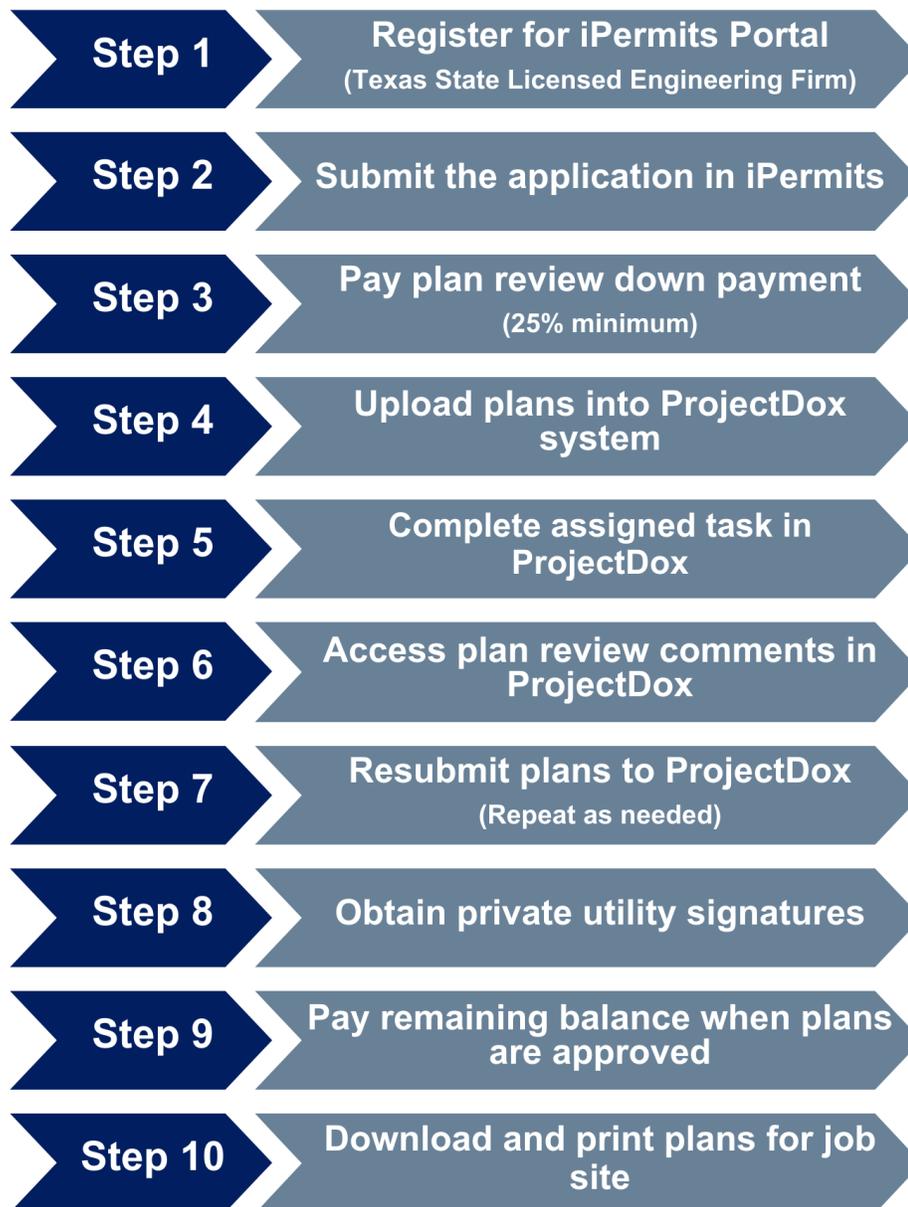
# Overview

## 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 used to upload drawings, receive comments, and receive approvals.



# iPermits Registration

## STEP 1: REGISTER AN ENGINEERING FIRM

Before a plan review application can be submitted to the Office of the City Engineer, the **Engineering Firm must have an iPermits profile.**

### Create a company profile:

1. Register the Engineering Firm.
2. Create an iPermits 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.**

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 ID:  Optionally, you can logon based on your email address rather than your user-id

User Email:

Password:

**Alternate User Actions**

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

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

**Announcements or User Information**

New password requirements will go into effect on April 1, 2023. Users must update their passwords every 270 days. New Passwords must be between 8-12 characters, and contain a mix of uppercase and lowercase letters, numbers, and special characters. Learn More at: <https://www.houstonpermittingcenter.org/news-events/new-iPermits-password-requirements>

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

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

Enter Your Engineering Firm License Number:

**Enter numbers only. No letters or dashes.**

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

# iPermits Registration

## STEP 2: CREATING A SECURITY ADMINISTRATOR USER PROFILE

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 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.

**Engineering Firm Name Information** ENGINEERING INC

License No: 1975 License Type: ENG

Entity Name Type:  Individual  Corporation or Firm

Last: First: Middle:

House # Fraction Pre-Dir Street Name Type Space

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

Phone: Firm Name: Email:

**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.

PLEASE NOTE

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

iPermits PIN: Enter your PIN PIN Confirmation: Enter your Conf...

**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.

Submit Add

Clear

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.

Create a **User ID** (max. 8 characters) and **Password** (8-12 characters) and enter your 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 the registration.

# iPermits Registration

## STEP 3: CREATING ADDITIONAL USERS FOR A REGISTERED FIRM

To create additional users for a registered firm, on the [iPermits login](#) page, select the link **Click here to Register** and enter the Firm's License number. (Refer to Step 1 for detailed instructions)

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 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.

**Engineering Firm Name Information**

License No: 12345 License Type: ENG

Entity Name Type:  Individual  Corporation or Firm

Last: DOE First: JOHN Middle: Middle Name

House # 1031 Fraction: Pre-Dir: Street Name: FANNIN Type: STREET Space: 203

City: HOUSTON State: TX Zip Code: 77002 Zip Plus: Phone: (713) 754-0430

Phone: Firm Name: DOE ENGINEERING Email:

**License Information**

iPermits PIN: Enter your 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.

Enter the **iPermits PIN** if it was provided by the Security Administration.

Otherwise check the box **PIN Override**. Choose the appropriate Security Level.

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

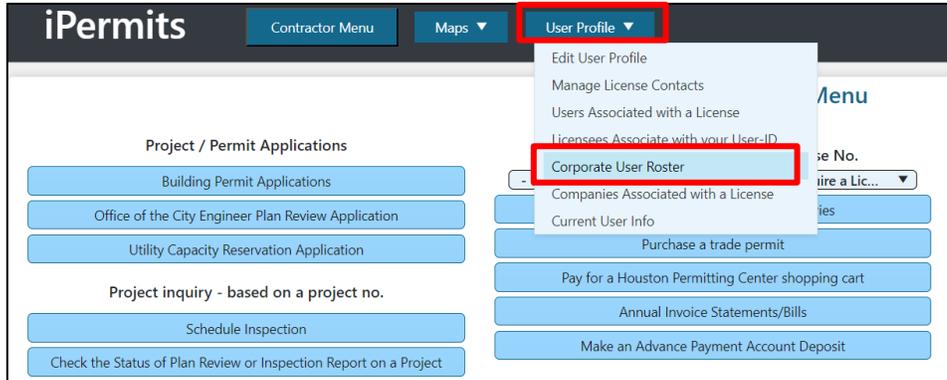
If **PIN Override** was selected, the Security administrator will be notified of the new user's profile pending activation.

Create a **User ID** (max. 8 characters) and **Password** (between 8-12 characters) and enter an email address. These will become your login credentials for iPermits. Complete the remaining required fields.

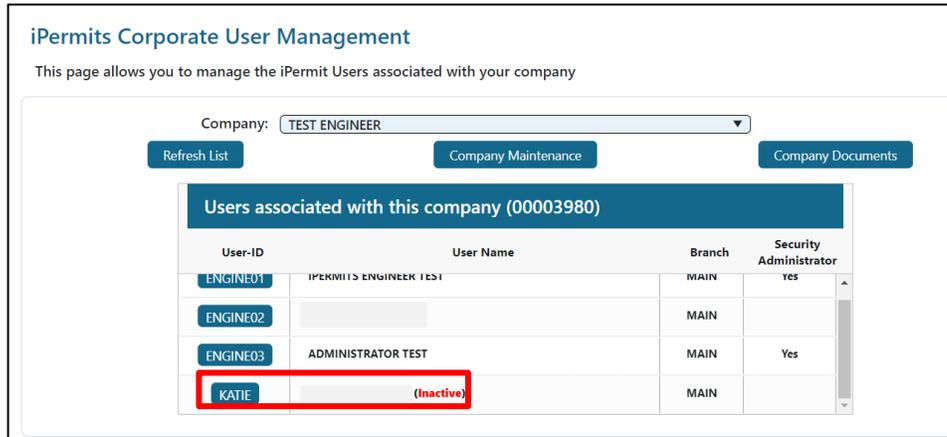
Check the disclaimer box and click **Submit Add** to create a user profile.

# iPermits Registration

## STEP 4: ACTIVATING A NEW REGISTERED USER – “Pending Activation”

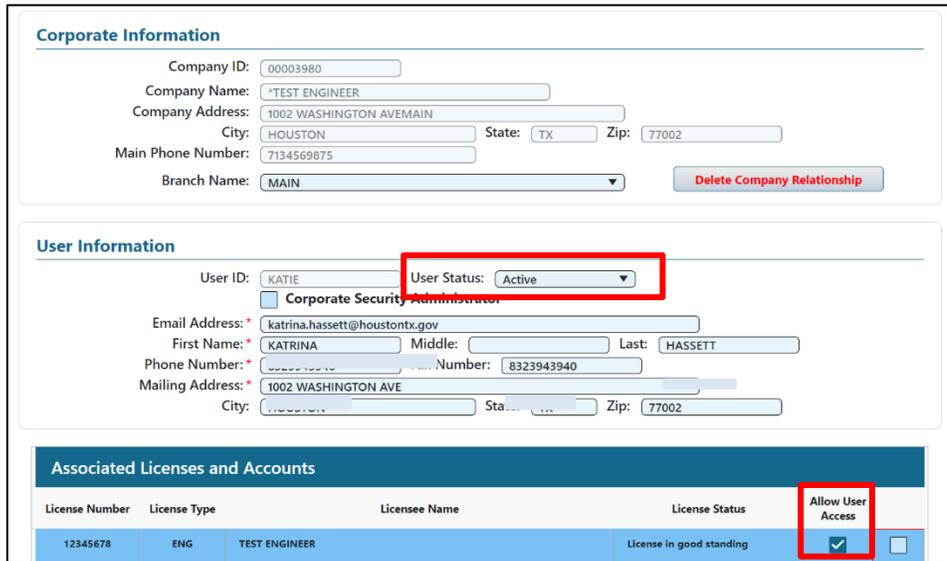


From the Security Administrator’s iPermits account, click on **User Profile**, then select **Corporate User Roster**.



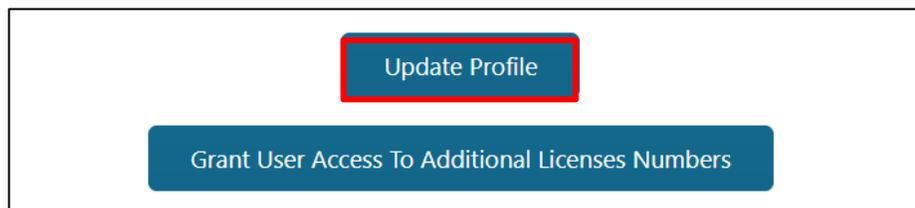
The iPermits Corporate User Management screen will display all the users associated with the Engineering Firm.

Click on the **User ID** with the **Pending Activation** status.



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.

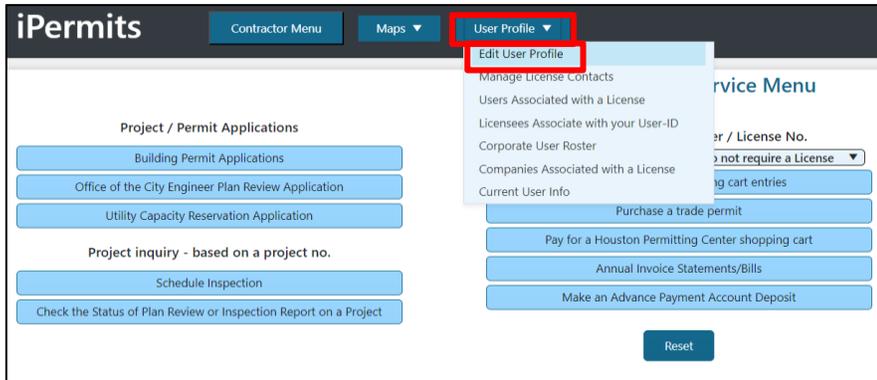


To **Remove** a User from the Company roster, change the status to **Inactive** and uncheck **Allow User Access** to the firm’s license(s).

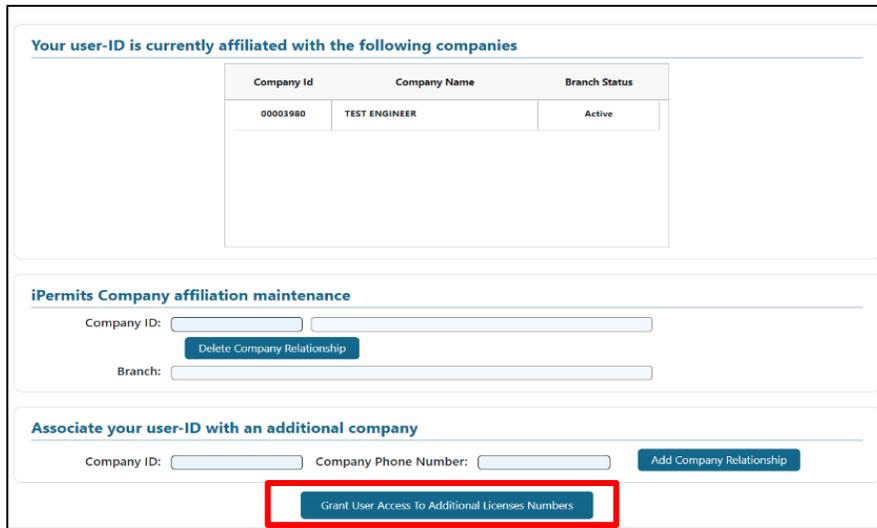
# iPermits Registration

## LINK AND AUTHORIZE THIRD PARTY USERS

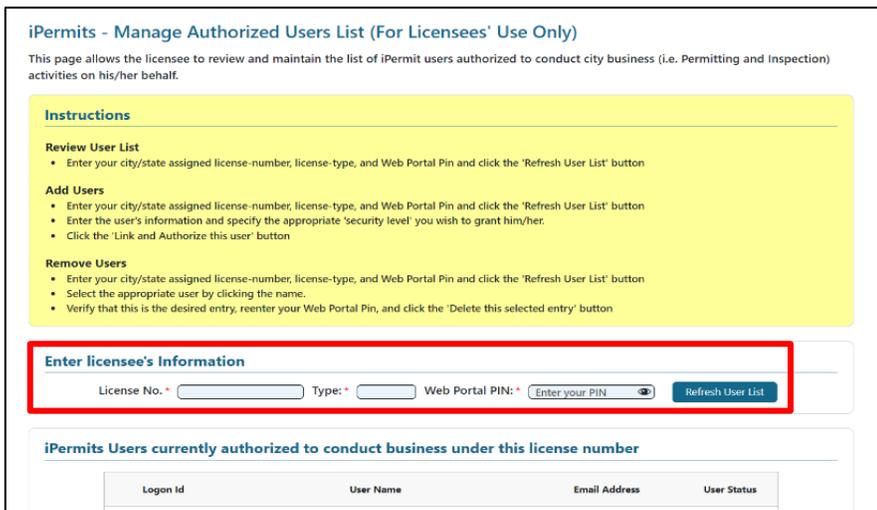
Once a Security Admin Account has been created, additional users may be added.



1. Click on “User Profile”.



2. “Grant User Access to Additional Licenses Numbers”.



3. Enter the **License information**.

- **License No.**
- **Type: “ENG” (CAPITAL LETTERS)**
- **Web Portal Pin (iPermits PIN)**

Click on the “Refresh User List” button.

# iPermits Registration

## LINK AND AUTHORIZE THIRD PARTY USERS

**iPermits - Manage Authorized Users List (For Licensees' Use Only)**

This page allows the licensee to review and maintain the list of iPermit users authorized to conduct city business (i.e. Permitting and Inspection) activities on his/her behalf.

**Instructions**

**Review User List**

- Enter your city/state assigned license-number, license-type, and Web Portal Pin and click the 'Refresh User List' button

**Add Users**

- Enter your city/state assigned license-number, license-type, and Web Portal Pin and click the 'Refresh User List' button
- Enter the user's information and specify the appropriate 'security level' you wish to grant him/her.
- Click the 'Link and Authorize this user' button

**Remove Users**

- Enter your city/state assigned license-number, license-type, and Web Portal Pin and click the 'Refresh User List' button
- Select the appropriate user by clicking the name.
- Verify that this is the desired entry, reenter your Web Portal Pin, and click the 'Delete this selected entry' button

**Enter licensee's Information**

License No. \* (00003) Type: \* ENG Web Portal PIN: \* ..... Refresh User List

**iPermits Users currently authorized to conduct business under this license number**

Logon Id	User Name	Email Address	User Status
ENGINE03	ADMINISTRATOR, TEST	rhooper1@robustsystems...	

Delete the selected Entry

**iPermits User's information (to authorize additional users, complete and submit this section)**

User ID: \* ..... Name: ..... Activate this User

Email: \* .....

Security Level: \*  Grant this user unrestricted access to this license  
 Link this user's access rights to the following authorized signature entry

Authorized Signatures: Select the appropriate authorized signature

Link and Authorize this User

4. Under the **iPermits User's Information** box. Enter the **User ID** and **Email Address** for the additional user that you wish to link to the Engineer firm's Security Admin Account.

Security Level: \*  Grant this user unrestricted access to this license  
 Link this user's access rights to the following authorized signature entry

Authorized Signatures: Select the appropriate authorized signature

Link and Authorize this User

5. Click the radio button "**Grant this user unrestricted access to this license.**"

**Note:** By selecting the Grant option, this does not mean the user will have full access to the Engineer license.

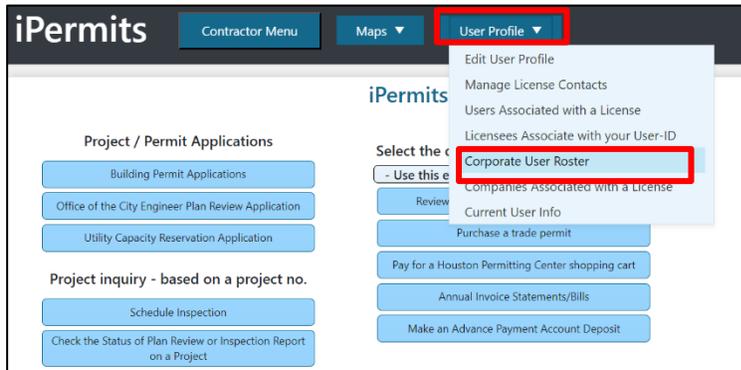
6. Please re-enter the **PIN NUMBER** above before selecting "**Link and Authorize this User**".

# iPermits Registration

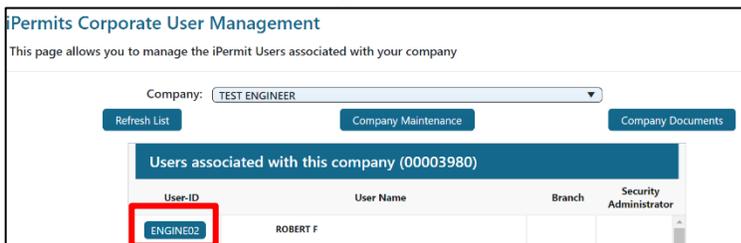
## UNLINKING AND UNAUTHORIZING THIRD PARTY USERS

To unlink an unauthorize account and unlink user, please follow the steps below...

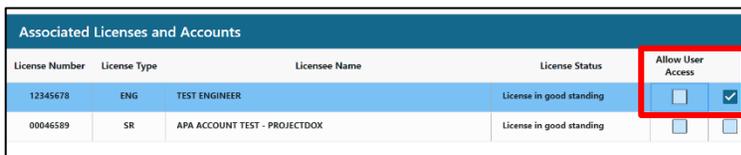
1. From the main menu, select the “**Corporate User Roster**” link on the left side.



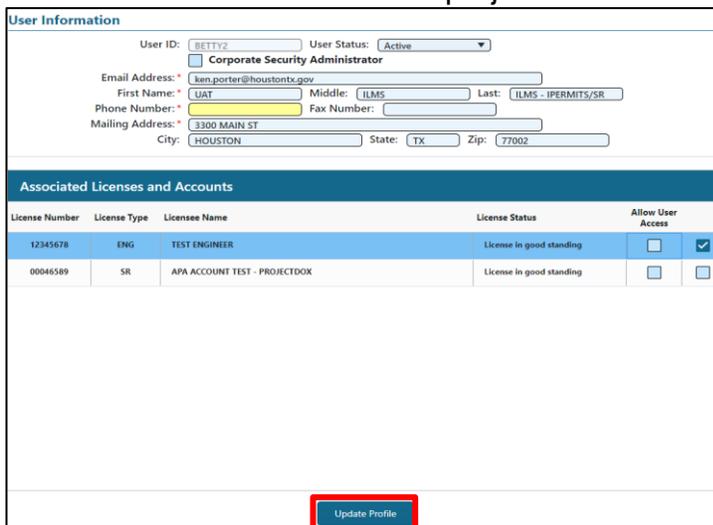
2. Select the account/user you wish to revoke access.



3. Under the **User Information** section, unmark the “**Allow User Access**” box.

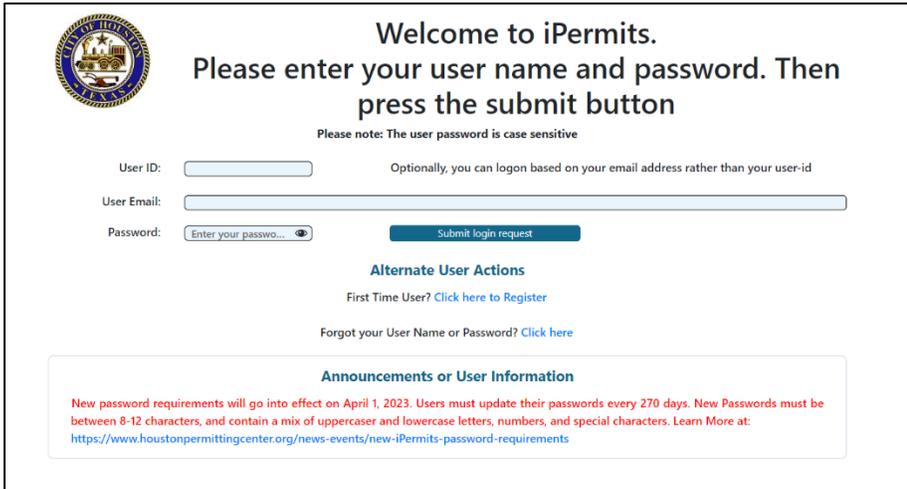


4. Select “**Update Profile.**” The specific user will be removed from using the firms license information for all future projects.

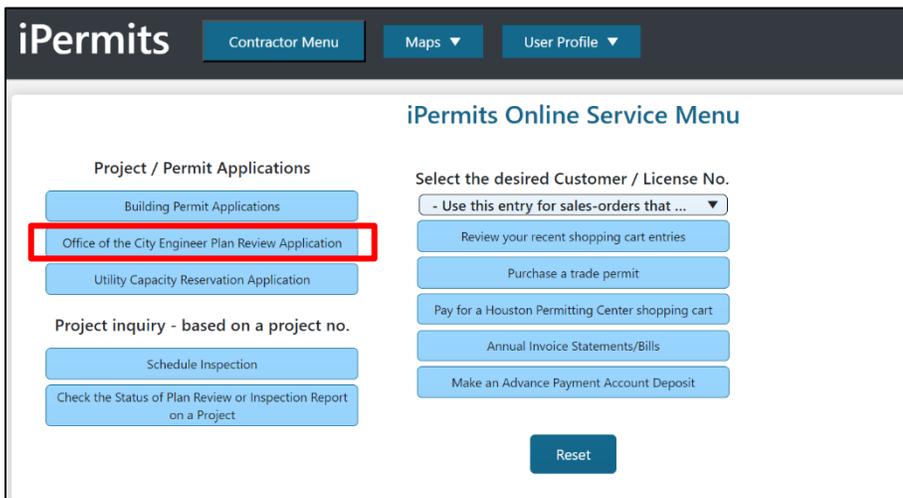


# Application Process

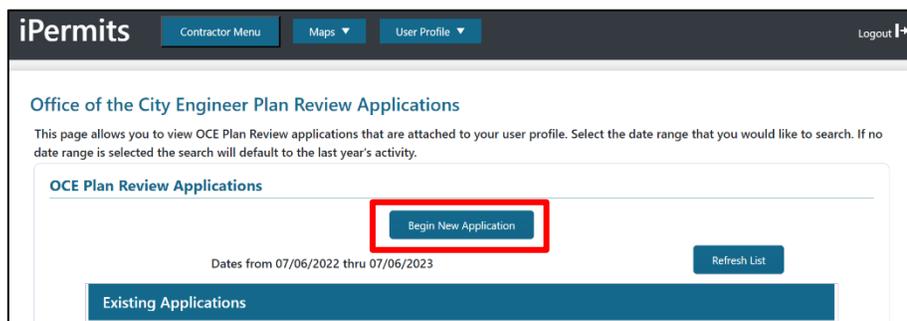
## INITIATING A NEW APPLICATION



Log in to the iPermits portal.



In the iPermits Online Service Menu, click on **Office of the City Engineer Plan Review Application**.



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



The iPermits Portal will display all applications submitted during year, with status comments in red.

# Application Process

## COMPLETE A PLAN REVIEW APPLICATION

Enter the required information.

When completed, click the **Save & Continue** button.

- Click the box if the application is for a **DAS Project (Digital Antenna System)**.
- Enter the description from the cover sheet into the “**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**.

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.
- **Projects submitted incorrectly to OCE will be cancelled. NO REFUNDS once an application is submitted. NO EXCEPTIONS.**
- 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 License 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**

Digital Antenna System Plan Submission

Describe the proposed development \*

Number of Sheets \*:

In FloodZone  Trees In ROW  Sidewalk/TOD

Key Map \*:   Water Facility  Wastewater Facility

County \*:   Inside City Limits  Outside City Limits

**Applicant/Engineer Information**

Select Applicant \*:

Mailing Address:  City:  State:  Zip:

Phone:  Phone:  Contact:

Email:

Phone:  Engineer of Record:  Email:

**Owner Information**

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

Street #  Fraction  Pre-Dir  Street Name  Type  Space

City:  State:  Zip Code:  Phone:

Phone:  Contact:  Email:

**Save & Continue**

Reset

**Submitting incorrect information, can delay the process and/or result in a rejection.**

# Application Process

## CHOOSE PAYMENT AMOUNT

The page will refresh and display the application fee information. **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 then click on the **Finalize Application** button.

### Application Fee

Please Note:

As of January 1st 2023, the Office of the City Engineer plan check fee as been increased from \$87.89 per sheet to \$90.23 per sheet. Based on the above mentioned, 5 sheets, this application's plan check fee is \$463.15 plus a \$128.66 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 \$128.66 administration fee.

- Generate a sales order based on a 25% down payment (\$115.79 ) plus the \$128.66 admin. fee
- Generate a sales order for the full amount (\$591.81 )
- Generate a sales order for \$   
(must be greater than 25% minimum plus the \$128.66 admin fee)
- Project scope is Competitive Local Exchange Carrier (CLEC) telecommunications related (e.g. installation of conduits / fiber optics) [click here to access](#) the State guidelines.

# Pay the Plan Review Down Payment

## CREDIT CARD OR E-CHECK

iPermits Shopping Cart Maintenance

**Sales Order Payment Selection**

Shopping Cart No: 03150213  
 Created: 07/06/2023

[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.

Sales Order	Type	Date	Holds Appvd	Customer / Contractor of Record (Permit emailed to)	Update Required	Fee / Amount Paid	Select to Pay
03429169	New Single Trade	06-JUL-2023	No Holds	12345678-ENG TEST ENGINEER kenneth.porter@robustsystems.com CITY MASTER PROJECT		\$576.47	<input checked="" type="checkbox"/>

Shopping Cart Amount Due : \$576.47

[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.

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: 03150213  
 Created: 07/06/2023  
 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  
 Corporation or Firm  
 TEST ENGINEER

Billing Address:

House # 1002  
 Fraction  
 Pre-Dir  
 Street Name WASHINGTON  
 Type AVENUE  
 Space

Billing Zip Code:  
 Zip code 77002  
 Zip plus 0000

Shopping Cart Amount Due | \$ 576.47

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

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

You will be transferred to the online payment website to complete the transaction.

# ProjectDox Set Up

## NEW USER ACCOUNT

**NEW ACCOUNT REQUEST**

---

Welcome to Online Submission!

Before gaining access, you must confirm your account.

**TIP: Set New Password Now**  
Your verification code will expire quickly. If it has expired, you can click on Login and request another to be sent by email.

Your login: **g** [@gmail.com](#)  
Verification code: **5567F3** good until 6/29/2023 1:58:53 PM

To set a new password, please click on "Login" below.

[Login](#) To confirm account and set your password

**ProjectDox Invitation**

After paying the plan review deposit an invitation, *as shown above*, will be sent to the applicant to upload plans through the ProjectDox® site.

New users will receive an invitation containing a verification code. Subsequent project invitations will not contain a code.

### 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

NEW ACCOUNT REQUEST

Welcome to Online Submission!

Before gaining access, you must confirm your account.

**TIP: Set New Password Now**  
Your verification code will expire quickly. If it has expired, you can click on Login and request another to be sent by email.

Your login: [geardo2018@gmail.com](mailto:geardo2018@gmail.com)  
Verification code: **5567F3** good until 6/29/2023 1:58:53 PM

To set a new password, please click on "Login" below.

**Login** To confirm account and set your password

From the email invitation, click on the **Login** button to open **ProjectDox®**.

**NOTE:** If your verification code has expired, click on the Forgot Password link and A new verification code will be emailed.

HOUSTON PUBLIC WORKS  
Houston Permitting Center

Verification Code \*

Enter the verification code that you received via email to complete the account verification process.

Continue Resend Code

Enter the Verification code provided and click on the **Continue** button.

HOUSTON PUBLIC WORKS  
Houston Permitting Center

Password:

Password must not contain special characters, must contain at least one digit and one alphabetic character, and must be between 8 and 10 characters

Confirm Password:

Update Cancel

Create your own password, then click **Update**.

- No Special Characters
- At least one digit
- At least one alphabetical character
- Minimum of 8-10 characters

HOUSTON PUBLIC WORKS  
Houston Permitting Center

Home Profile

My Profile ?

Personal Information

In order to start your application request, please verify your profile information.  
To be able to save changes in your Personal Information you must provide your Current Password.

First Name \* LOGAN

Last Name \* \*\*\*\*\*EZ

Email \* [mezt1011@gmail.com](mailto:mezt1011@gmail.com)

Phone \*  x

The Phone field is required in XXX-XXX-XXXX format

Additional Phone  x

I Have a Company  Yes  No

This field is required.

Address 1 \*

The Address 1 field is required.

Address 2

Country \* (Not Specified)

The Country field is required.

Province/State \*

City \*

The City field is required.

Postal Code/Zip Code \*

The Postal Code/Zip Code field is required.

Current Password \*

Save Cancel

After creating your password, login. You will be prompted to your **User Profile**, to complete the required fields.

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

*Logging in to **ProjectDox®** a second time (and every time after that); will require you use the permanent password that you've created in your Profile page.*

# Navigation Basics

## HOME PAGE TOOLBARS

PROJECT	DESCRIPTION	LOCATION	STATUS	TASKS (2)
<a href="#">23068777</a>	1,986 SF. RETAIL REMODEL 1-1-5-M-B '21IBC	HARRIS	Corrections Requested	<span>Open</span> Applicant Resubmit Task
<a href="#">23068775</a>	1,986 SF. RETAIL REMODEL 1-1-5-M-B '21IBC	HARRIS	Corrections Requested	<span>Open</span> Applicant Resubmit Task
<a href="#">23019746</a>	**VOID**COMMERCIAL BUILDING REPAIR		Withdrawn	
<a href="#">23005054</a>	**VOID**COMMERCIAL REPAIRS AS PER SPEC SHEET. 2015 IBC		Withdrawn	
<a href="#">23001694</a>	**VOID**NEW DRIVEWAY AND APPROACH 2015 IRC		Withdrawn	

ACTION	PROJECT	LOCATION	DESCRIPTION	OWNER	STATUS	CREATE DATE
	23008202	FT BEND	TEST OCE #10	Office of City E		5/15/2023
	23008201		TEST OCE #9	Office of City E		

The ProjectDox home page is divided into two main sections.

The **Projects** section displays basic information about every project you've submitted for electronic plan review as an applicant and/or the list of projects you have been invited as a design team member.

You can view all projects by clicking on the **All** button.

The **Recent** Projects button displays projects entered in the past 30 days, sorted by the most recent.

The **Archived** button will display all projects that have been completed.

Projects can be sorted by clicking on the header of the specific column. (i.e., Project, Location, Description, Owner...)

You can enter keywords related to your specific project through the **Search**  field. Searches can also be done through the column's header (i.e., Project, Location, Description, Owner...)

The **Tasks** tab section 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.

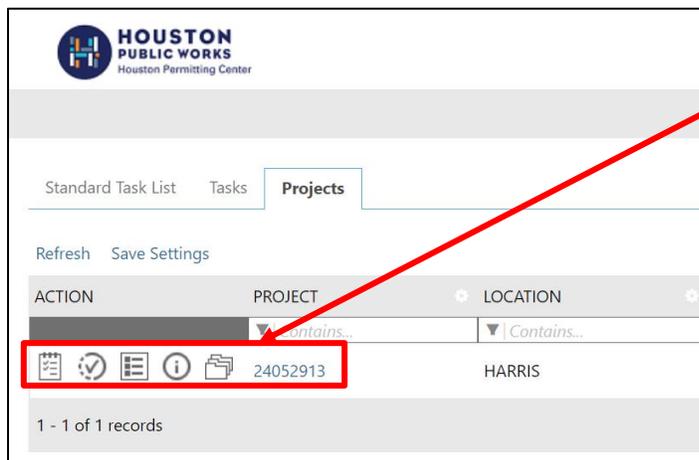
# Navigation Basics

## HOME PAGE TOOLBARS

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



- The **Home** button will take you back to the Home Page.
- The **Search** button allows you to search for a project based on the key information entered the Project Info Page, or it allows you to search for keywords within a project.
- The **All Task** button shows any tasks requiring action from you.
- The **Profile** button will take you to your User Profile, where you can edit your personal information or change your password.
- The **Logout** button logs you out of ProjectDox®.
- The **Help** button takes you to the ProjectDox® Help site. Use the index or search functions to find instructions on specific aspects of ProjectDox®



From the Home screen on the **Projects** tab, you can view your projects and perform the following actions.

- 📅 View Pending Tasks
- ✅ Project Status
- 📄 Project Reports
- 📄 Project Info
- 📁 View and Upload files

# 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.

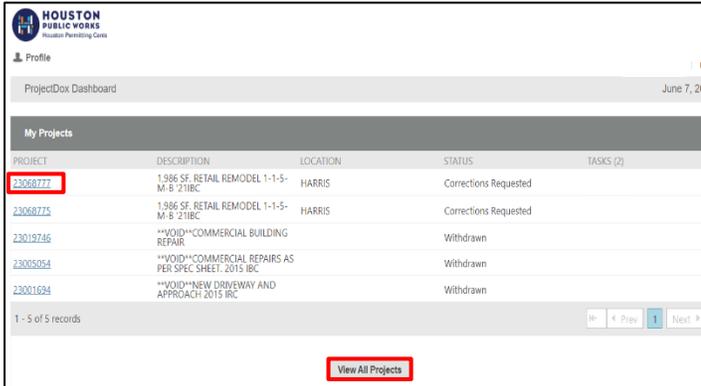
FOLDER	SHEET NO.	EXAMPLE
DRAWINGS	001-999	01-COVER
DOCUMENTS	001-999	NO STARD CONVENTION
POST PERMIT SUBMITTALS	001-999	01-PLAN AND PROFILE
UPDATE SIGNATURE	001-999	01-COVER
REVISION	001-999	01-COVER
BLUELINE RECORDS	001-999	FOR COH USE
QUICK REVIEW	001-999	FOR COH USE

# Uploading Your Files

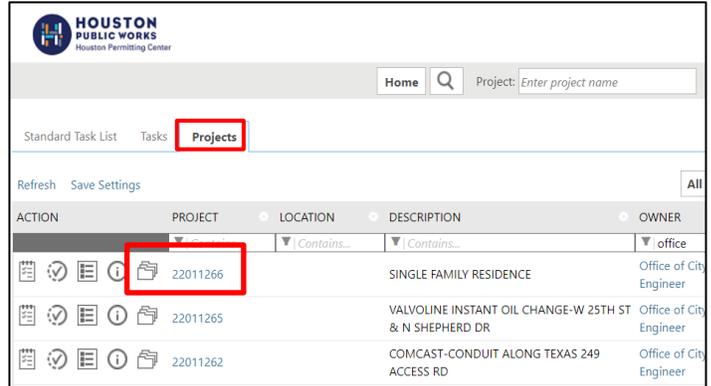
## FIRST SUBMISSION TO THE CITY OF HOUSTON

To upload files, select your Project Number from the **Dashboard** or go to **View All Projects** and select the project number from the **Projects** tab in the **Home** page.

### DASHBOARD



### HOME PAGE > PROJECTS

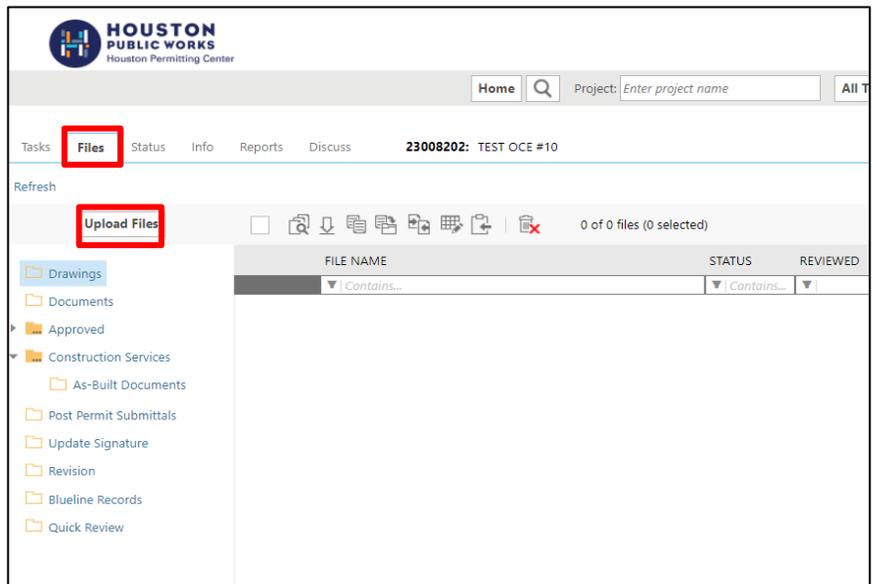


In the **Files** tab, select the desired folder.

Click the arrow ► icon to view any subfolders and click the arrow ▼ icon to hide subfolders.

Then, click the **Upload Files** button.

A pop-up window will appear.



# Uploading Your Files

## FIRST SUBMISSION TO THE CITY OF HOUSTON

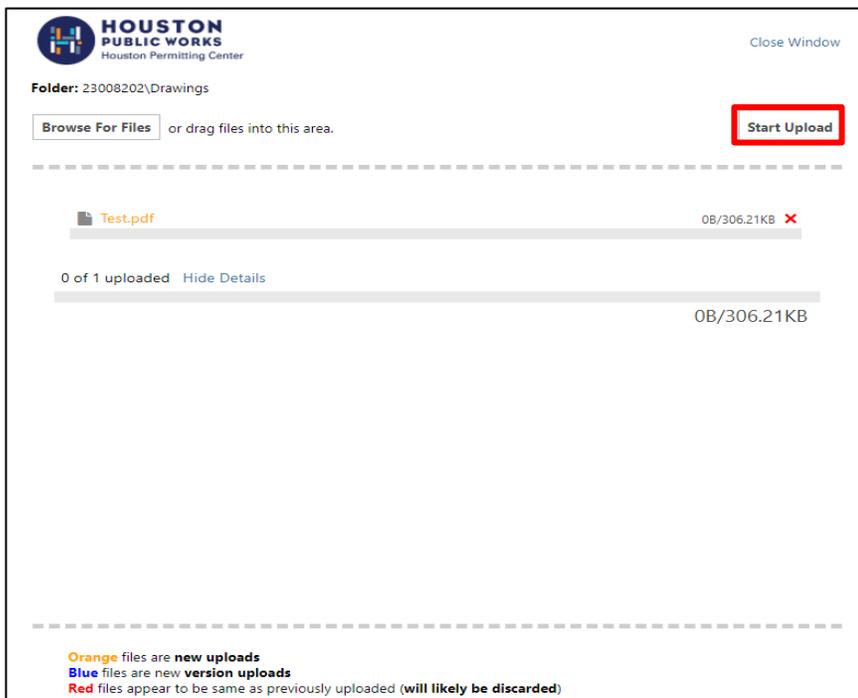
By default, up to 200 files or 10GB, whichever comes first. By default, up to 200 files can be uploaded at the same time.



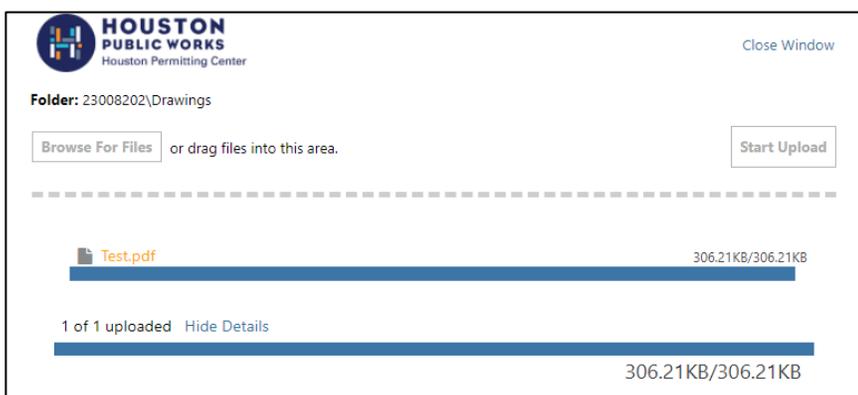
1. Select **Browse for Files** and navigate to the file or Drag & Drop your desired files.

2. Select the file and click Open.

3. Once all files have been selected or dragged, click the **Start Upload** button.



Orange files are **new uploads**  
Blue files are new **version uploads**  
Red files appear to be same as previously uploaded (**will likely be discarded**)



# Uploading Your Files

## FIRST SUBMISSION TO THE CITY OF HOUSTON

Once files are uploaded into a folder, thumbnail images of all the files will be visible.

Next to each thumbnail is the filename, status, name of the user who uploaded that file, upload date and time.

If a file is uploaded into the wrong folder, select the specific file, then click on the delete button (red "X"). **The ability to delete files is only permitted on the first submission.**

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

To upload files into another folder, select the designated folder on the left and repeat the process until all drawings and documents are uploaded to their respective folders.

The screenshot displays the Houston Public Works web application interface. At the top, the logo for Houston Public Works is visible. Below the logo, there is a navigation bar with 'Home', a search icon, a 'Project' field with the placeholder 'Enter project name', and buttons for 'All Tasks', 'All Reports', 'Logout', and a help icon. The main content area shows a project titled '23008202: TEST OCE #10' with a 'Main Contact' of 'TEST ENGINEER'. The 'Files' tab is active, showing a list of files. A red box highlights the 'Delete' icon (a trash can with an 'X') in the top toolbar. Another red box highlights the 'Test.pdf' file in the list, with a red arrow pointing to the 'Delete' icon. A third red box highlights the 'STATUS' column header in the table. Below the table, a detailed view of a file is shown, including a thumbnail, file name, and metadata such as 'Uploaded By: JASON GUZMAN', 'Upload Date: 7/19/23 10:49 PM', 'File Type: PDF', 'File Size: 172.37 KB', 'Pages: 1', 'Sheet Size: 8.5x14.0', 'Vector/Raster: Vector', 'Signed: PDF Writer: Skia/PDF m114'.

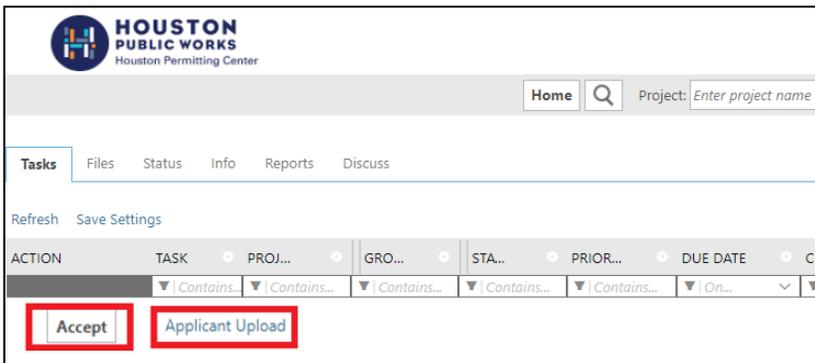
# Complete Assigned Task

## APPLICANT UPLOAD

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

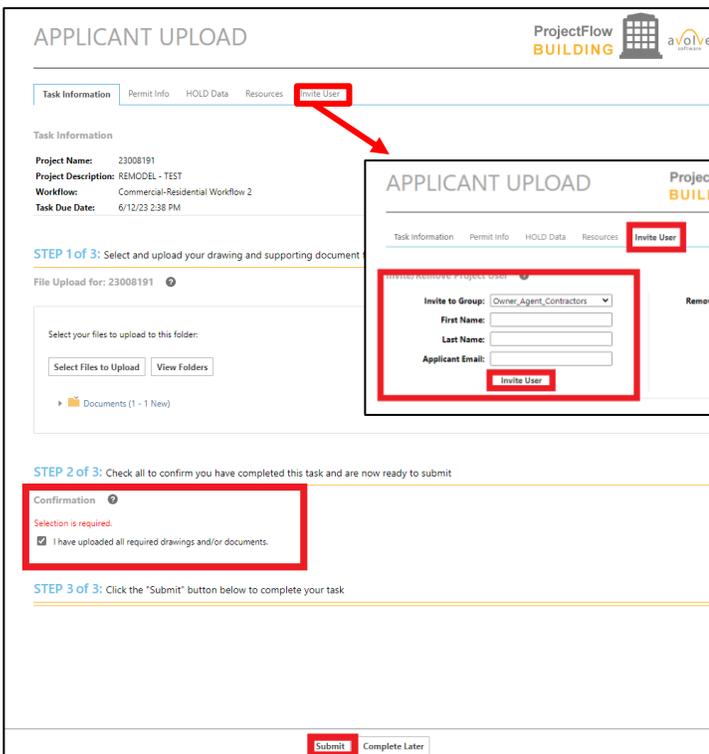
To notify the Office of the City Engineer that your plans are ready for the pre-screen review, the applicant must complete the assigned **Applicant Upload** task.

From the project's main page, click on the **Tasks** tab to display the assigned task.



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

An eForm will pop-up in a separate window.



Through the eForm, the applicant can click on the **Invite User** tab to 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 same abilities as the applicant.

**All required drawings and documents should be uploaded prior to completing the task. Once a task is complete permission to upload is removed.**

If ready to complete the task, conform all files have been uploaded and **Submit**.

Not ready to complete the task? Click on the **Complete Later** button.

# 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 will assign a formal review to all required disciplines.

If items are missing or corrections are required, a **PreScreen Correction Resubmit Request** Task notification will be emailed with instructions on how to resubmit to fix the issues. Please login to ProjectDox 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.



### PreScreen Correction Resubmit Request Task Assignment

**Attention** :

Your plan review submission for Project: \_\_\_\_\_ 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:	_____
Task:	<b>Prescreen Resubmit</b>
<a href="#">Project Access</a>   <a href="#">Login to ProjectDox</a>	

**Contact Information**  
If you have any problems using the site, please contact us at 832-394-9494 or email [rmcacd@houstontx.gov](mailto:rmcacd@houstontx.gov).

**Please do not reply to this email.**

## Prescreen Corrections Email

# Pre-Screen Review

## PRESCREEN CORRECTIONS TASK

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

1. Login to **ProjectDox**.
2. From the **Task** tab, Click on **Accept** or **Prescreen Corrections Task**.
3. Click on **Review Comments**. In this section, the Applicant may view and respond to the required corrections.
4. Upload Versioned or New 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.
  - a) **Versioned Files** – A new version of a file previously submitted. If uploading versioned files, answer the following question...

Versioned Files New Files

Are your updated files named exactly the same\* as the prior versions? Yes No Watch video

\* "name-v2.pdf" is not an "exact" file name match to "name.pdf"

- b) If **Yes**, follow the same procedures as the initial upload.
- c) If **No**, select the new file that will be a new version of the existing file. Projectdox will automatically rename the file and convert it as a new version.
- d) **New Files** – A new file/document, not previously uploaded or submitted.

**Note:** If new sheets are needed to be inserted and renumbering the existing sheets is a must, you may:

Number the sheets with a #.1, #.2, #.3, etc.... or #A, #B, #C, etc....

Insert the renumbered file names and write a note in the **Add Comment** box displayed in the E-form. Comments should state, **“Sheets have been renumbered and sheets from previous sheets need to be moved.”**

Comments Log

Add Comment Watch video

Show 5 records

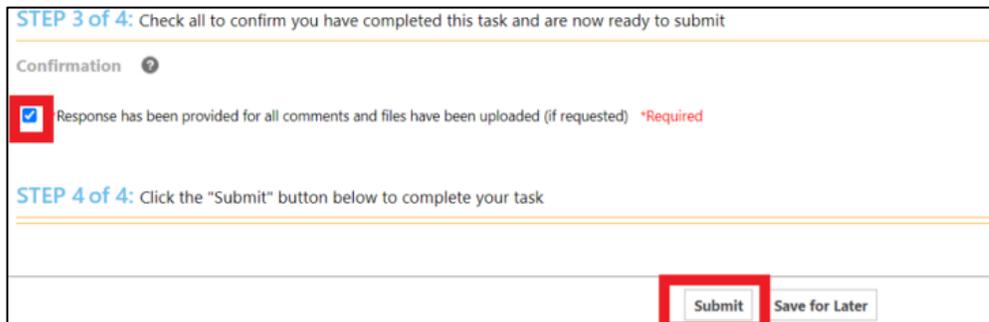
DISCUSSION COMMENT	PARTICIPANT	CREATED
Comments Log	Christopher Casey	1/21/20 3:42 PM

1 - 1 of 1 records

# Pre-Screen Review

## PRESCREEN CORRECTIONS TASK

5. If all the required comments have been addressed and all required files have been uploaded, certify your information and **Submit**.

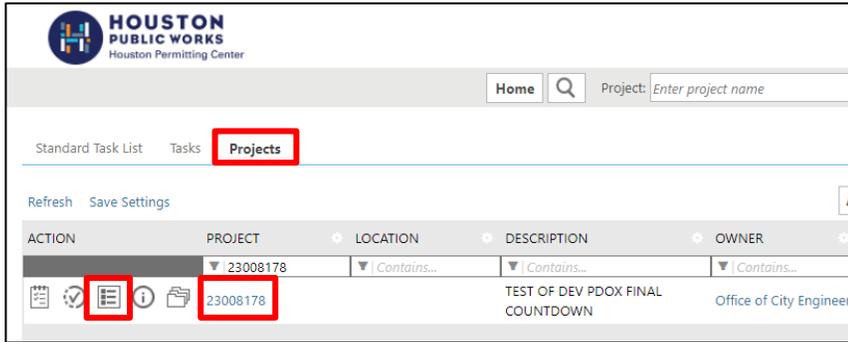


The screenshot shows a confirmation step in a task. At the top, it says "STEP 3 of 4: Check all to confirm you have completed this task and are now ready to submit". Below this is a "Confirmation" section with a question mark icon. A checkbox is checked, and the text next to it reads "Response has been provided for all comments and files have been uploaded (if requested) \*Required". Below this is "STEP 4 of 4: Click the 'Submit' button below to complete your task". At the bottom right, there are two buttons: "Submit" and "Save for Later". The "Submit" button is highlighted with a red box.

The Prescreen Resubmit Task is now complete, and your project status will change from Prescreen Resubmit to Prescreen Review.

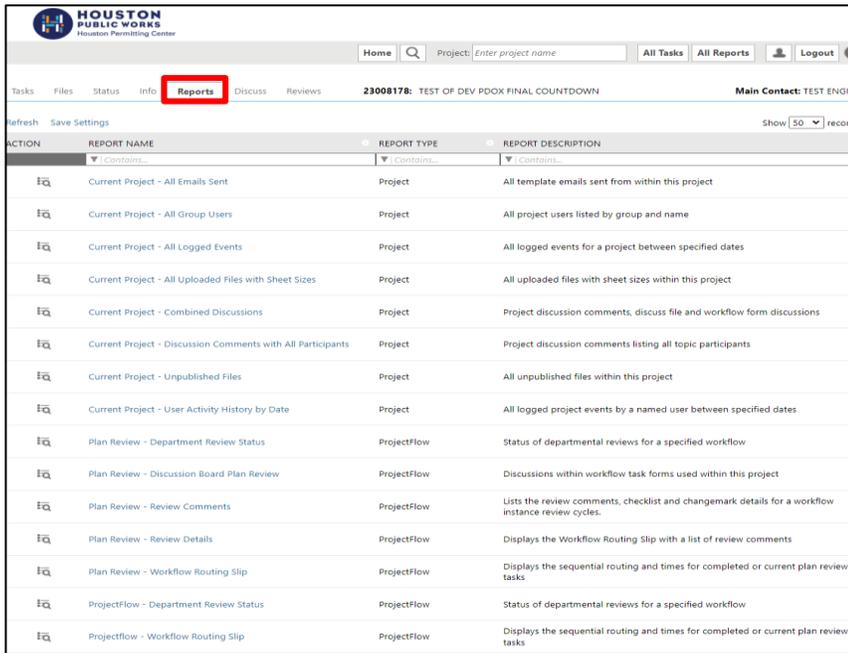
\*The Prescreen Corrections task can be repeated as many times as necessary until all corrections have been submitted. You will receive an email when your Prescreen review is accepted and review is beginning.

# HOW TO RUN REPORTS IN PROJECTDOX



## STEP 1

Log in to ProjectDox account and select the **Project** number or the **Projects Report** icon to run a report.

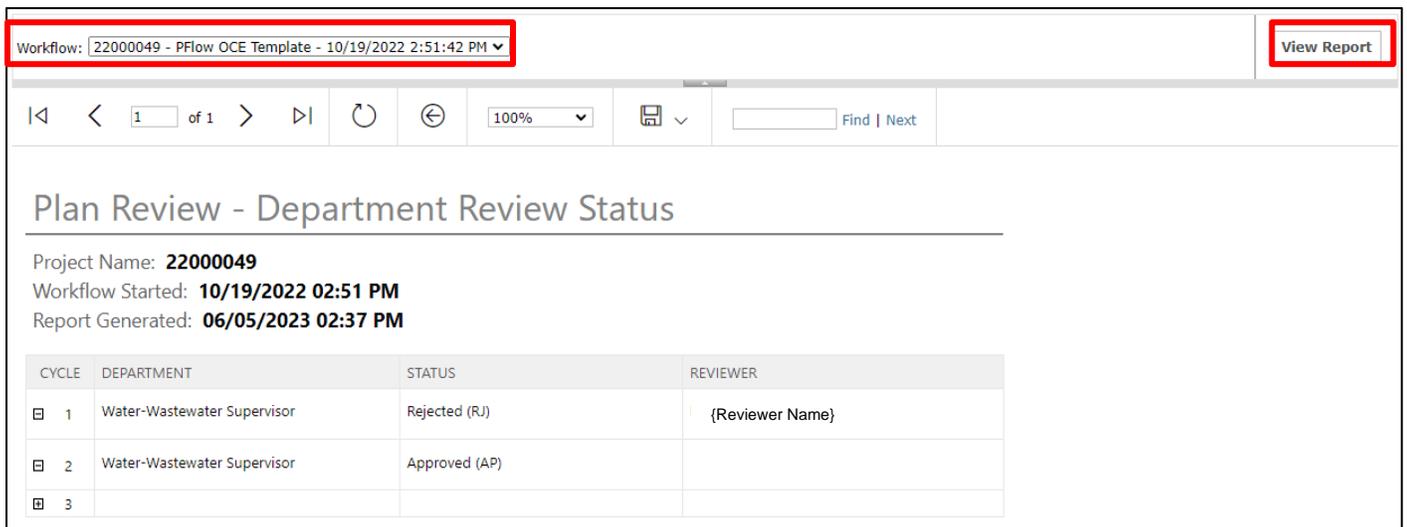


## STEP 2

On **Reports** Tab. Select the magnifying glass or the report link for the report you wish to run. Select the available template from the **Workflow** drop down menu and then click **View Report**.

The most common reports you would want to run are:

- Department Review Status
- Workflow Routing Slip



# 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.

**Note:** **Assign Only** and **Not Applicable** are also possible statuses, assign only is for Supervisors assigning your project to a reviewer and Not Applicable stating that their department is not required to review your plan.

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 Plan Review Admin member will apply the final Office of the City Engineer approval stamp to all the drawings. 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 **Applicant Resubmit** 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.

The screenshot displays the 'STEP 1 of 4: Respond to all comments, as requested' section. Under 'Resolve Review Comments', there are counts for 'Unresolved Comments: 2' (highlighted with a red box), 'Submitter Questions: 1', 'Info Only Comments: 2', and 'Files with Markups: 1'. Below these are buttons for 'Review Comments', 'Export to Excel', 'Import Excel Responses', and 'Watch video'. The 'Department Review Results' table shows a row for 'Water-Wastewater 814' with a status of 'Rejected (RJ)'.

DEPARTMENT	REVIEWED BY	STATUS
Water-Wastewater 814		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:

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

Resolve Review Comments

Unresolved Comments: 2  
 Submitter Questions: 1  
 Info Only Comments: 2  
 Files with Markups: 1

Plan Review: **Review Comments** | Export to Excel | Import Excel Responses | Watch video

Department Review Results

DEPARTMENT	REVIEWED BY	STATUS
Water-Wastewater 814		Rejected (RJ)

Dept: Show All | Status: Show All | Response: Show All | Search: [enter keyword]

Type: Show All | Cycle: Show All | Time: Show All

Ref.#	Markup	Comment	Response
Ref.# 26	Storm Water 816	This project is not reviewed this time since there is not reviewed by Engineer of record before submitting to Office of City Engineer.	No response required.
Ref.# 24	sw#01	01 G-01-Cover Sheet REVISED 3-14-22.pdf	Type your response here.
Ref.# 1	traffic:1	05 C-01-Proposed Site.pdf	Type your response here.

1. Log in to **ProjectDox**.
2. Select the **Applicant Resubmit Task** link from the **Tasks** section on the homepage. Select **OK** to accept responsibility for completing the task. (An E-form will Open)
3. If the engineers have added any markups to your drawings/documents, you can view the markups by clicking on the **Review Comments** button to open the comments viewer.
  - To view a specific markup in full size, click on the link within the markup.
  - Provide a response to each markup in the Applicant Response column.
  - Note that comments can be marked as resolved or information only requiring no response.
4. You can view department status (approved/rejected/not applicable/assign only) under the **Department Review Results** section.
5. When all comments have been addressed, upload the revised drawings/documents into the appropriate folders using the original file name(s).
6. You can also export the comments to excel, answer in the correct box (making no changes to the rest of the excel sheet) and re-upload to automatically fill comment responses.
7. Check the acknowledgement check boxes under the Task Instructions and click on the **Submit** button to complete your task. *Note: The Office of City Engineer will not receive your revised plans if this task is not completed.*

The Intake group will confirm that plans have been uploaded and assign to the proper disciplines. If any one of the disciplines rejects the review, the **Applicant Resubmit** step will be repeated until approved.

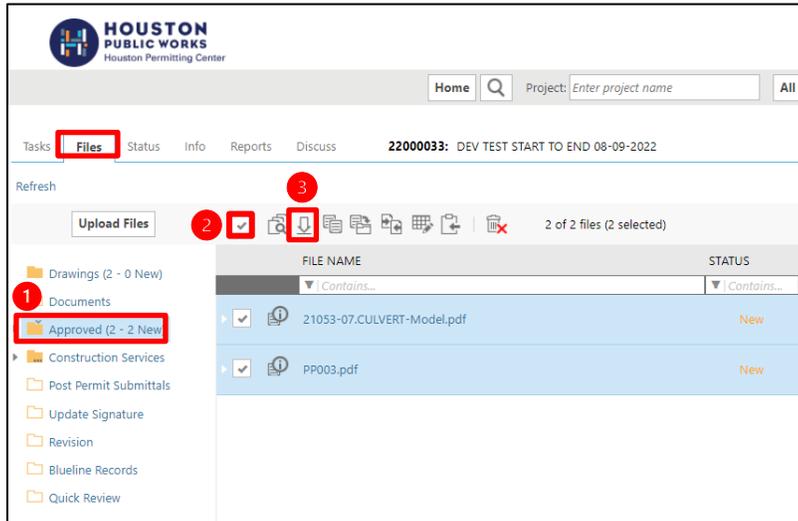
**Note:** If new sheets are needed to be inserted/uploaded and renumbering existing sheets is a must, you may:

- Number the sheets with a #1, #2, #3, etc.... or #A, #B, #C, etc.... to insert without renumbering.
- Insert the 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

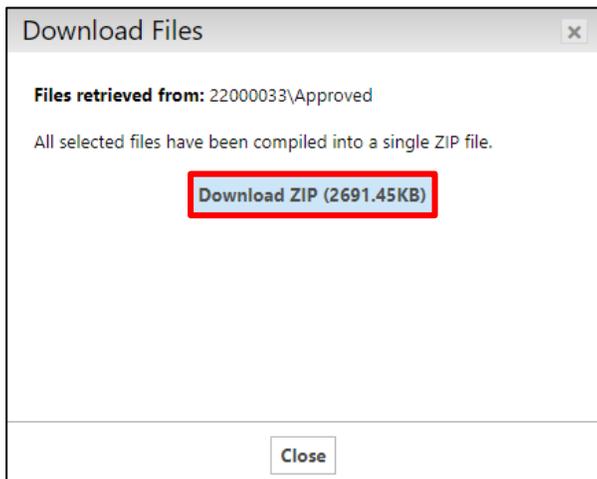
After a payment is made in the iPermits Portal, you will receive an Approved Plans Ready for Download email indicating that you may login to ProjectDox and download your approved plans in the folder marked **Approved**.



On the **Files** tab, select the **Approved** Folder.

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** 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

### Revision process is as follows:

1. Email a revision request to [OCE@houstontx.gov](mailto:OCE@houstontx.gov) including the **project number** and **applicant information, if the applicant has changed**.
2. The OCE Plan Review Admin will review the revision request and, if approved the project will be re-opened for a revision.
3. Upload the cover sheet and revised sheets to the **Revision Folder only**.
4. Cover sheet must have revision callout including **revision number, short description, revised sheets dated** and **initialed by Engineer of Record (EOR)**.
5. Revised sheets must include revision note initialed and dated by EOR.
6. Complete the ProjectDox Task. The Review Process will follow the standard submittal procedures.



The Office of the 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 updated signatures are required for a project already approved in ProjectDox, the applicant can email [OCE@houstontx.gov](mailto:OCE@houstontx.gov) to request the project be re-opened.

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 update plans into the **Update Signature folder** for the project.

### For Inside City Limits projects:

1. Signatures need to be updated from the private utility companies.
2. The PE needs to write note on the cover sheet stating 'No design or topographic changes to approved plans', and sign and date the note.

### For Outside City Limits projects:

1. No Utilities signatures needed.
2. The PE needs write note on the cover sheet stating 'No design or topographic changes to approved plans', and sign and date the note.

### 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. Assigned inspector will need to approve any as-builts in field.

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

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



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



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Houston, Texas 77002

832.394.8810

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