



**HOUSTON
PUBLIC WORKS**

Houston Permitting Center

Office of the City Engineer Plan Review

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



PAPER PLANS ARE NO
LONGER NEEDED

Table of Contents

Overview	04
iPermits Registration	05
Application Process	12
Pay the Plan Review Down Payment	15
ProjectDox Set Up	16
Navigation Basics	18
Standards	20
Uploading Your Files	21
Complete Assigned Task	24
Pre-Screen Review	26
Review of Plans	30
Download and Print	32
Revisions	33
Update Signatures	35

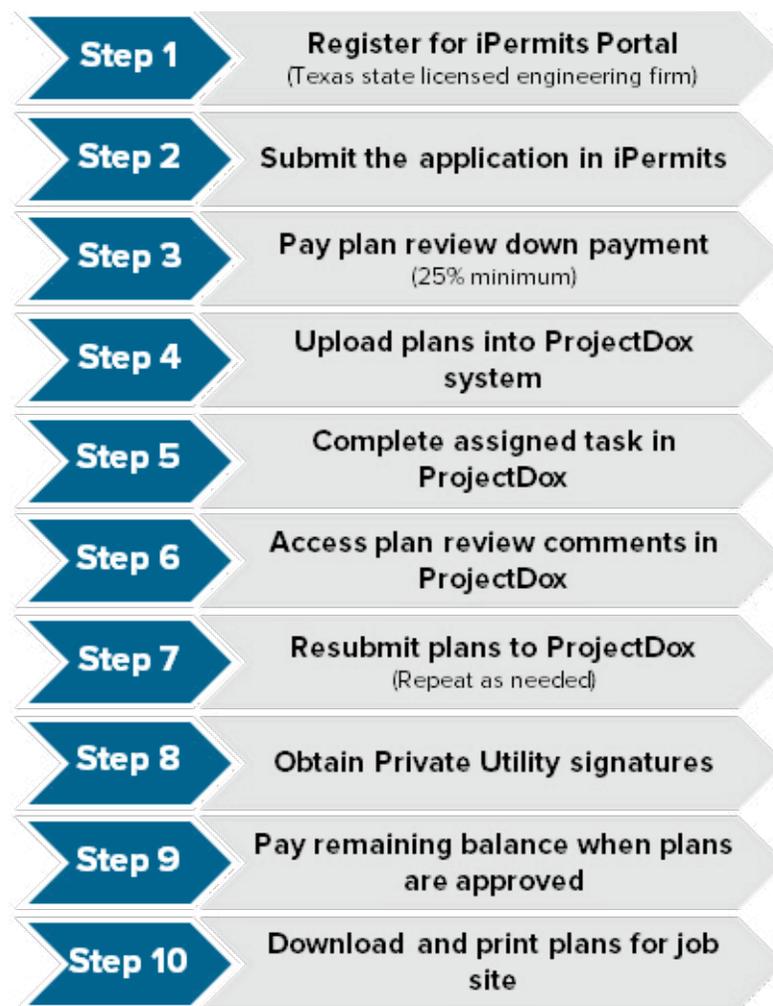
Overview

ELECTRONIC PLAN REVIEW PROCESS

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

The electronic plan review process is broken down into 10 key steps. The process utilizes two systems: iPermits and ProjectDox.

The iPermits Customer Portal is used to submit applications and to make payments. ProjectDox is use to upload drawings, receive comments, and receive approvals.



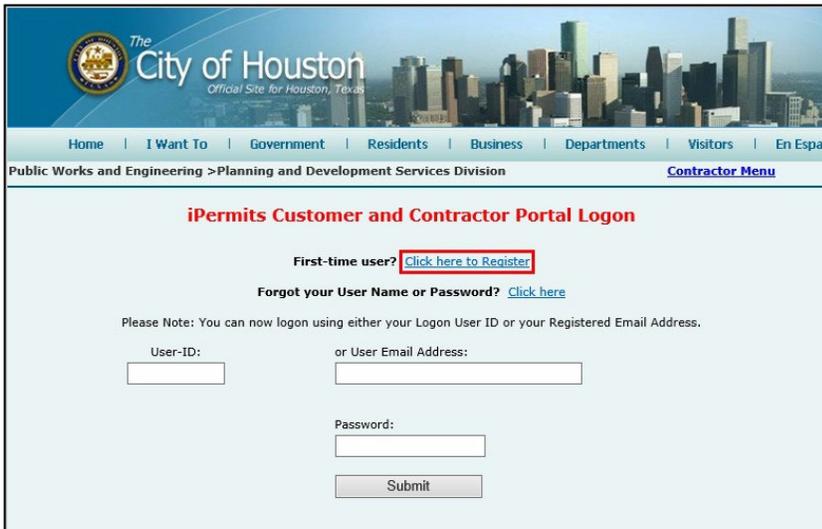
iPermits Registration

STEP 1: REGISTER AN ENGINEERING FIRM

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

To create a company profile:

1. Register an Engineering Firm
2. Create a Security Administrator User Profile.
3. Register Additional Firm Users
4. Activate Newly Registered Firm Users



If the engineering firm is already registered in iPermits, please skip to Step 3 on page 10.

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

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

Select **Yes** to the question, “Are you associated with a Texas state licensed engineering firm?”

Enter your Texas State registered **Engineering Firm License Number** and click the **Submit** button.



Note: If your engineering firm license number is not in the iPermits database, please contact the Office of the City Engineer at oce@houstontx.gov

iPermits Registration

STEP 2: CREATING A SECURITY ADMINISTRATOR USER PROFILE

The City of Houston
Official Site for Houston, Texas

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

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

Create an Engineering Firm related User Profile

Please read the following information before proceeding

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

Engineering Firm Name Information

License No: [] License Type: ENG

Entity Name Type: Individual Corporation or Firm

Corporation or Firm: ABC Engineering Firm

Mailing Address: House # 1234 Fraction [] Pre-Dir [] Street Name Main Type Street Space []

City: DAYTON State: [] Zip: []

Firm Name: ABC Engineering

Phone Number: 8323949000 Phone Number: [] numeric digits only

Email Address: houston.permittingcenter@houstontx.gov

License Information

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

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

iPermits PIN: [] PIN Confirmation: []

User Information

User ID: *userid Password: * [] Confirm: * []

Email Address: * houston.permittingcenter@houstontx.gov

First Name: * John Middle: [] Last: * Doe

Mailing Address: * 1002 Washington Avenue

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

Company Name: * Houston Permitting Center

Phone Number: * 8323949000 Fax Number: []

I hereby affirm the following declaration:

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

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

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

© 2015 copyright, City of Houston. All Rights Reserved
Site best viewed at 1280 x 1024 screen size

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

Note: the first person to register a firm will become the security administrator and sets the master PIN. Enter any 6-digit number in the **iPermits PIN** field and re-enter it to confirm.

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

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

iPermits Registration

STEP 3: CREATING ADDITIONAL USERS FOR A REGISTERED FIRM

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

Enter the **iPermits PIN** if it was given to you. Otherwise check the box for **PIN Override**. Choose the appropriate Security Level. *Note: users cannot select “This is my license” level without the iPermits PIN.*

The screenshot shows the 'Create an Engineering Firm related User Profile' page on the City of Houston website. The page includes a navigation bar with links like Home, I Want To, Government, Residents, Business, Departments, Visitors, and En Espanol. Below the navigation is a breadcrumb trail: Public Works and Engineering > Planning and Development Services Division > Contractor Menu. The main heading is 'Create an Engineering Firm related User Profile' with a sub-note: 'Please read the following information before proceeding'. A yellow box contains instructions: 'Only State Licensed Engineering Firm Licensees should complete this page.', 'Fields marked with "*" are required.', and 'Within iPermits, the primary use of this license type is to prepare and submit Office of the City Engineer plan review application requests. If you are a Mechanical contractor and are trying to establish a web presence to purchase mechanical permits online, please return to the previous web page and select the "trade license" related option. If you need further assistance please contact the Office of the City Engineer.' The form is divided into sections: 'Engineering Firm Name Information' (License No., License Type: ENG, Entity Name Type: Individual or Corporation or Firm, Corporation or Firm: TEST ENGINEER, Mailing Address: 1002 WASHINGTON, City: HOUSTON, State: TX, Zip: 77002, Firm Name: ILMS TEST, Phone Number, Email Address), 'License Information' (iPermits PIN, PIN Override checkbox), and 'User Information' (Security Level: This is my license or staff member, User ID, Password, Confirm, Email Address, First Name, Middle, Last, Mailing Address, City, State, Zip, Company Name, Phone Number, Fax Number). At the bottom, there is a declaration section with a checkbox 'I hereby affirm the following declaration:' and a text area for the declaration, followed by 'Submit Add' and 'Clear' buttons.

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

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

iPermits Registration

STEP 4: ACTIVATING A NEWLY REGISTERED USER



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

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

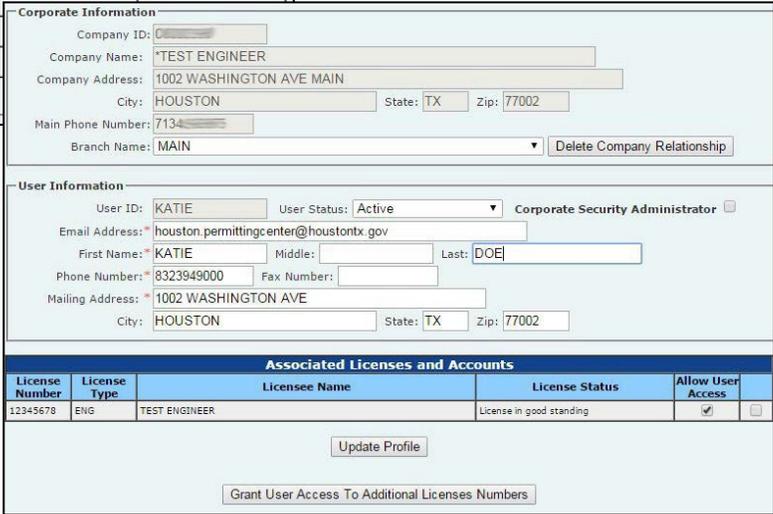


Change the **User Status** to *Active* in the drop-down menu and select the **Update Profile** button.

The user can now login to iPermits and start submitting applications for plan review.



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



iPermits Registration

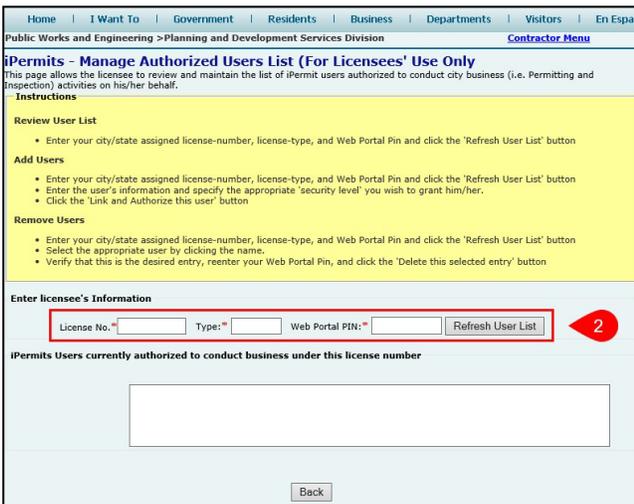
LINK AND AUTHORIZE THIRD PARTY USERS

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

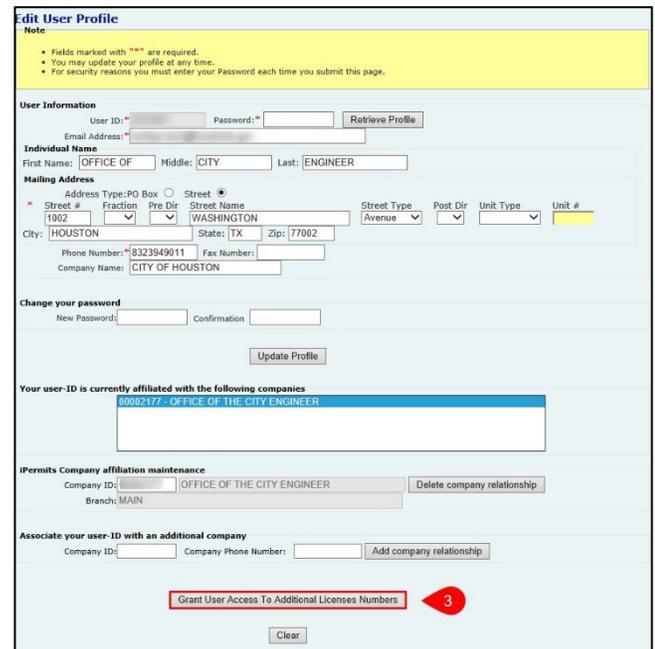
- 1) Click on “Edit User Profile”.



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



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



iPermits Registration

LINK AND AUTHORIZE THIRD PARTY USERS

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

The screenshot shows the 'Permits - Manage Authorized Users List (For Licensees' Use Only)' page. It includes a navigation menu, a 'Review User List' section with instructions, and a form to 'Enter licensee's Information'. The form contains fields for License No. (10500), Type (ENG), and Web Portal PIN. Below this is a table of 'iPermits Users currently authorized to conduct business under this license number' with one entry: 'SD0004 - DAWOUDI, SAM - sam@csdengroup.com'. At the bottom, the 'iPermits User's information' section has fields for User ID, Name, and Email, and radio buttons for 'Grant this user unrestricted access to this license' (selected) and 'Link this user's access rights to the following authorized signature entry'. A 'Link and Authorize this User' button is at the bottom.

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

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

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

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

iPermits Registration

UNLINKING AND UNAUTHORIZING THIRD PARTY USERS

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

iPermits Online Service Menu

User Profile
You are: **OCE001**
[Edit User Profile](#)
[User Document Catalog](#)
[Corporate User Roster](#)
[Licensees Associate with your User-ID](#)
[Users Associated with a License](#)
[Companies Associated with a License](#)

Select the desired Customer
- Use this entry for sales-orders that do not require a License

- Purchase a Trade Permit
- Review Your Recent Shopping Cart Entries
- User Project Management - List Maintenance
- Pay for a Houston Permitting Center shopping cart
- Make an Advanced Payment Account Deposit

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

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

Company: OFFICE OF THE CITY ENGINEER

Users associated with this company (00002177)			
User-ID	User Name	Branch	Security Administrator
OCE001	ENGINEER OFFICE OF CITY	MAIN	Yes
SHOCKEM	WIRE SHOCK THEM	MAIN	Yes

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

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

4) Then select “Update Profile”

User Information

User ID: SHOCKEM User Status: Active Corporate Security Administrator

Email Address: [Redacted]

First Name: SHOCK Middle: THEM Last: WIRE

Phone Number: [Redacted] Fax Number: [Redacted]

Mailing Address: [Redacted] City: HOUSTON State: TX Zip: 77002

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

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

iPermits Registration

INITIATING A NEW APPLICATION



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



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



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

Application Process

COMPLETE A PLAN REVIEW APPLICATION

City of Houston
Official Site for Houston, Texas

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

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

Office of the City Engineer Application for Plan Review

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

Please read the following information before proceeding

- Fields marked with "*" are required.
- The specified number of sheets must be accurate or the application may not be accepted

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

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

Application

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

Please Describe the Proposed Development*:

Number of Sheets*:

In FloodZone Trees In ROW

Key Map*:

Water Facility Wastewater Facility

County* **Please Select** Inside City Limits Outside City Limits

Applicant/Engineer Information

Firm License/Type: *TEO, LLC

Mailing Address:

City: State: Zip: 77005

Contact*:

Phone Number*: Phone Number: numeric digits only

Email Address*:

Engineer of Record*:

Phone Number*: numeric digits only

Email Address*:

Owner Information

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

Entity Name Type: Individual Corporation or Firm Applicant is Owner

Last, First Middle:

Mailing Address: Name: Unit:

City: State: Zip:

Contact:

Phone Number: Phone Number: numeric digits only

Email Address:

Save & Continue

Reset

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

- Click the box if application is for a **DAS Project**.
- Enter the description from the cover sheet into the "Please describe the Proposed Development" box.
- If the project is in or partially in the flood zone, check the box for **In Flood Zone**.
- If the project is inside COH city limits and there are trees in right-of-way, check the box for **Trees in ROW** to include Urban Forestry into the plan review.
- If the project has a water plant, water wills or contract water, check the box for **Water Facility**.
- If the project includes a force main, lift station or reclaimed water line, check the box for **Wastewater Facility**.

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

Application Process

CHOOSE PAYMENT AMOUNT

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

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

Application Fee

Please Note: As of January 1st 2017, the Office of the City Engineer plan check fee as been increased from \$79.67 per sheet to \$80.49 per sheet. Based on the above mentioned, 13 sheets, this application's plan check fee is \$1,092.65 plus a \$116.75 administration fee. At minimum a 25% down payment must be made prior to submitting the plans for review. Your options are as follows: Pay the 25% minimum, pay the full amount, or pay any amount greater than the 25% minimum; plus the \$116.75 administration fee.

- Generate a sales order based on a 25% down payment (\$273.16) plus the \$116.75 admin. fee
- Generate a sales order for the full amount (\$1,209.40)
- Generate a sales order for \$.00
(must be greater than 25% minimum plus the \$116.75 admin fee)

Save and Continue

Finalize Application

Reset



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

Pay the Plan Review Down Payment

CREDIT CARD OR E-CHECK

iPermits Shopping Cart Maintenance
 - Sales Order Payment Selection

Shopping Cart No:

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

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

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:

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

Corporation or Firm:

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

Billing Zip Code: -

Shopping Cart Amount Due 200.80

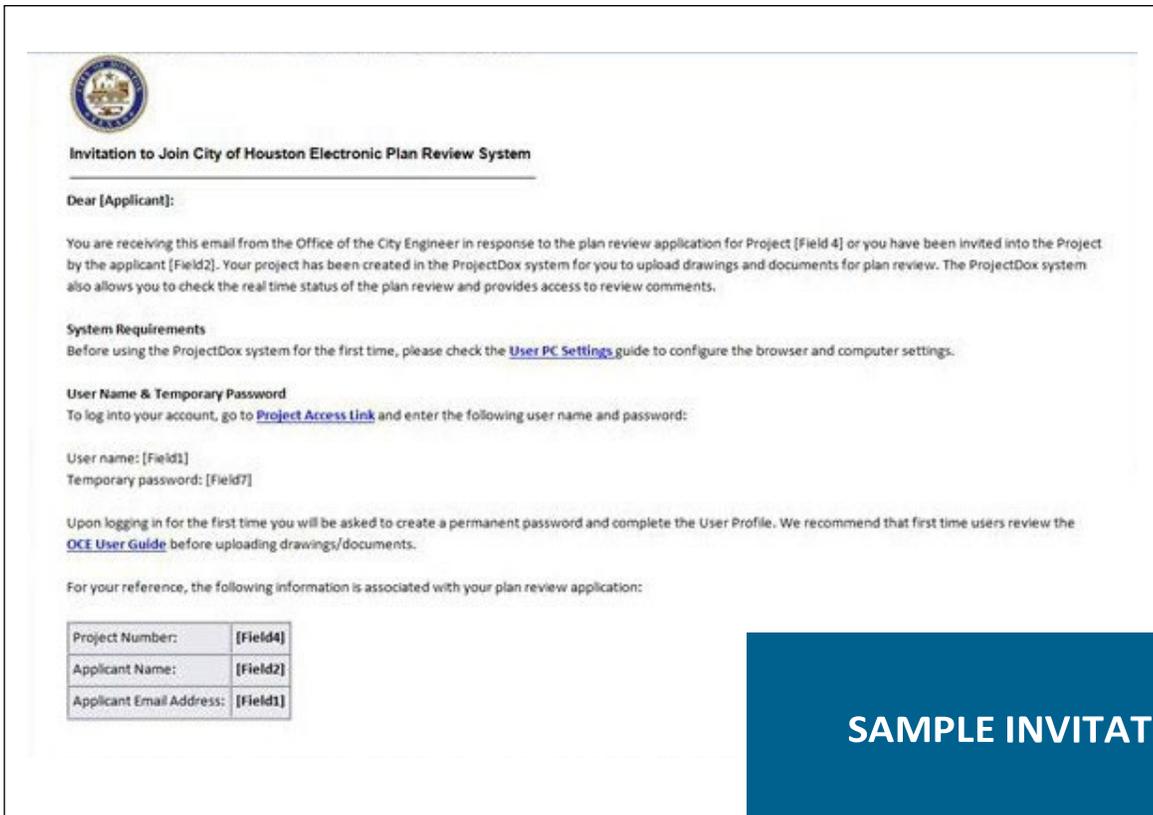
Please Note: Electronic Check payments cannot be submitted after 8:30 PM.

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

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

ProjectDox Set Up

NEW USER ACCOUNT



The image shows a sample invitation email for the City of Houston Electronic Plan Review System. It includes a header with the city seal, a salutation, a main body of text explaining the system and providing instructions, and a table of application details. A blue box on the right side of the email preview contains the text 'SAMPLE INVITATION'.

Invitation to Join City of Houston Electronic Plan Review System

Dear [Applicant]:

You are receiving this email from the Office of the City Engineer in response to the plan review application for Project [Field4] or you have been invited into the Project by the applicant [Field2]. Your project has been created in the ProjectDox system for you to upload drawings and documents for plan review. The ProjectDox system also allows you to check the real time status of the plan review and provides access to review comments.

System Requirements
Before using the ProjectDox system for the first time, please check the [User PC Settings](#) guide to configure the browser and computer settings.

User Name & Temporary Password
To log into your account, go to [Project Access Link](#) and enter the following user name and password:

User name: [Field1]
Temporary password: [Field7]

Upon logging in for the first time you will be asked to create a permanent password and complete the User Profile. We recommend that first time users review the [OCE User Guide](#) before uploading drawings/documents.

For your reference, the following information is associated with your plan review application:

Project Number:	[Field4]
Applicant Name:	[Field2]
Applicant Email Address:	[Field1]

SAMPLE INVITATION

Once the plan review down payment has been received, an invitation (see above) will be sent to the applicant to upload drawings and documents into ProjectDox.

For new users, the invitation will contain a temporary password. Subsequent project invitations will not contain a password.

First-time users should note:

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

- Please use the **User PC Settings** guide from the login page for instructions and other browser specific settings you need to make for the ProjectDox system.
- The login page also has a link for adding a desktop shortcut to the ProjectDox site, and a link for adding it to your favorites.

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

ProjectDox Set Up

NEW USER ACCOUNT

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

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

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

- Change your password
- Contact information

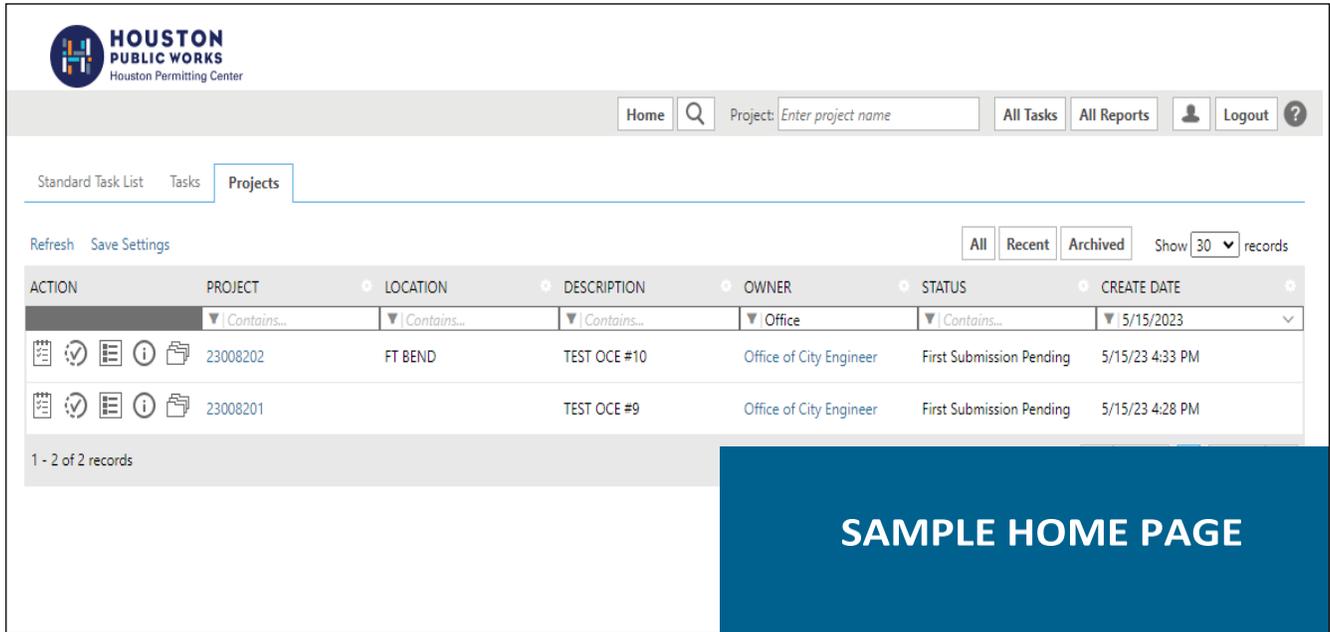
Click the **Save** button to continue to the home page.

If you ever forget your password, click on the **Forgot Your Password?** link.

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

Navigation Basics

HOME PAGE TOOLBARS



The 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.

The **All** Projects button list all your projects.

The **Recent** Projects button displays projects accessed in the last 30 days.

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



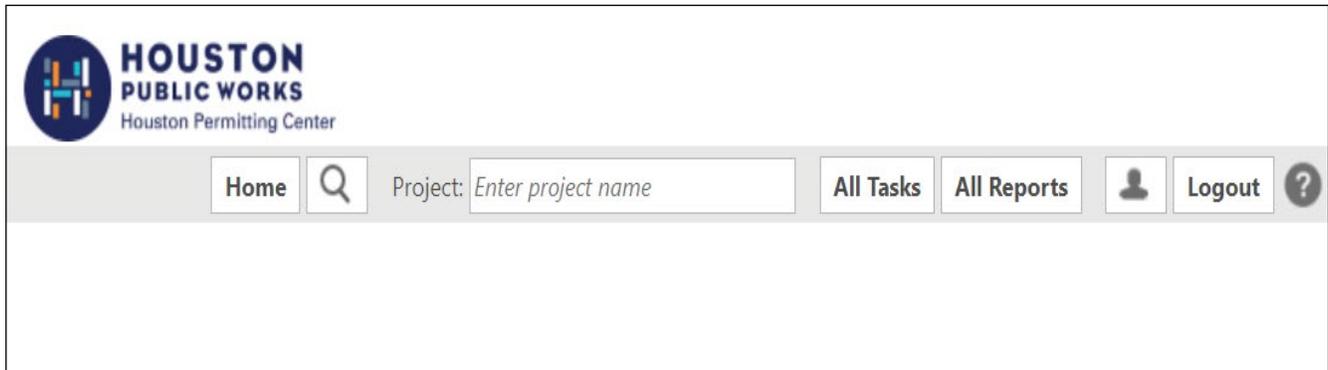
ProjectDox can be used in multiple browsers, including Chrome, Safari, FireFox, and Edge. Review the *System Use Requirements* document located on the ProjectDox login page to ensure proper set up is completed.

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.

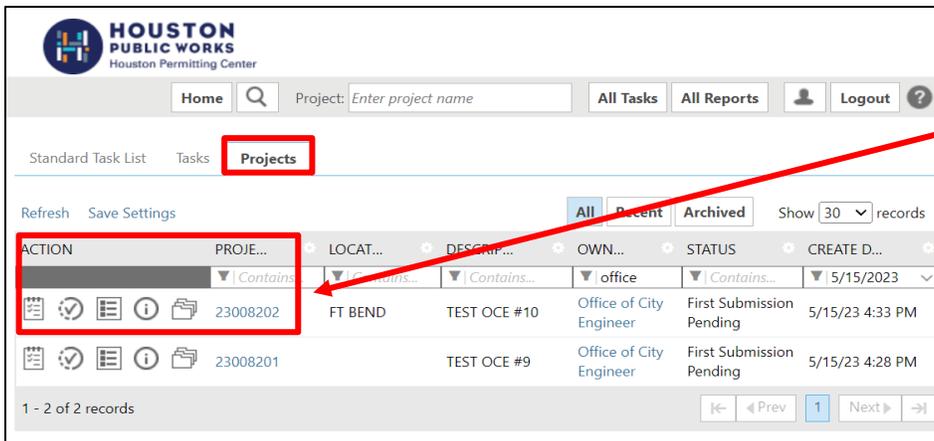
Navigation Basics

HOME PAGE TOOLBARS



Your primary navigation buttons are located 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 key information entered on 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

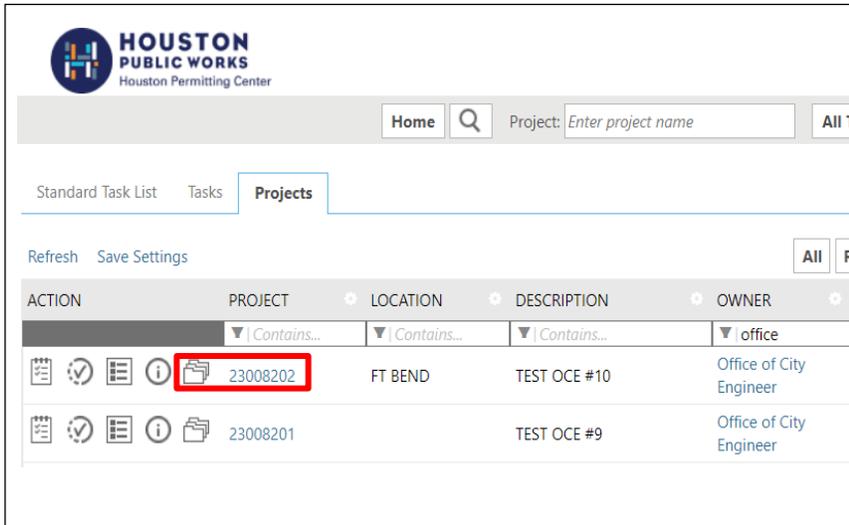
Files are securely managed through a pre-defined folder structure, which is listed below. Users cannot rename or add folders to the structure.

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.

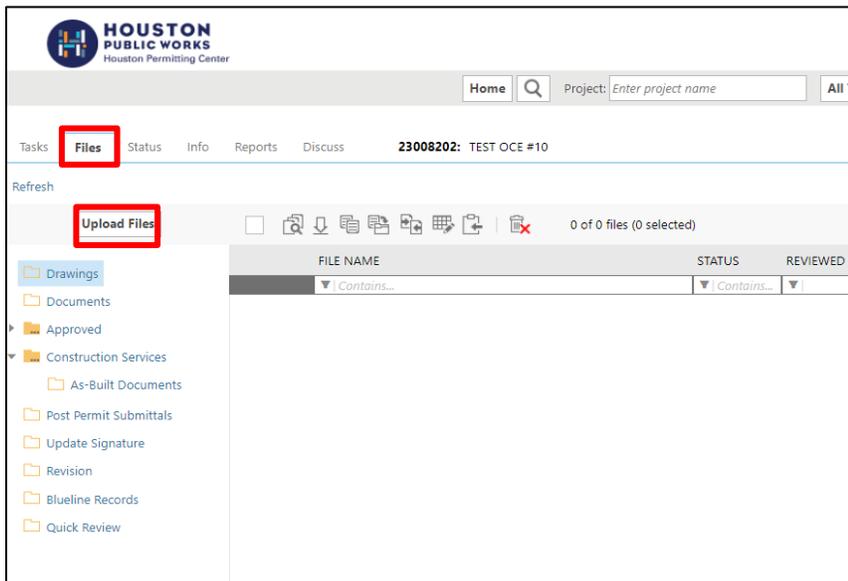
FOLDER	SHEET NO.	EXAMPLE
DRAWINGS	001-999	01-COVER
DOCUMENTS	001-999	NO STARD CONVENTION
POST PERMIT SUBMITTALS	001-999	01-PLAN AND PROFILE
UPDATE SIGNATURE	001-999	01-COVER
REVISION	001-999	01-COVER
BLUELINE RECORDS	001-999	FOR COH USE
QUICK REVIEW	001-999	FOR COH USE

Uploading Your Files

FIRST SUBMISSION TO THE CITY OF HOUSTON



On the **Home** page, under the **Projects** tab. Select the project number for which you want to upload files or click on the Files  icon.



Select the name of the folder you want to upload into.

Click the  icon to view any subfolders and click the  icon to hide subfolders.

Click the **Upload Files** button.

A pop-up window will appear.

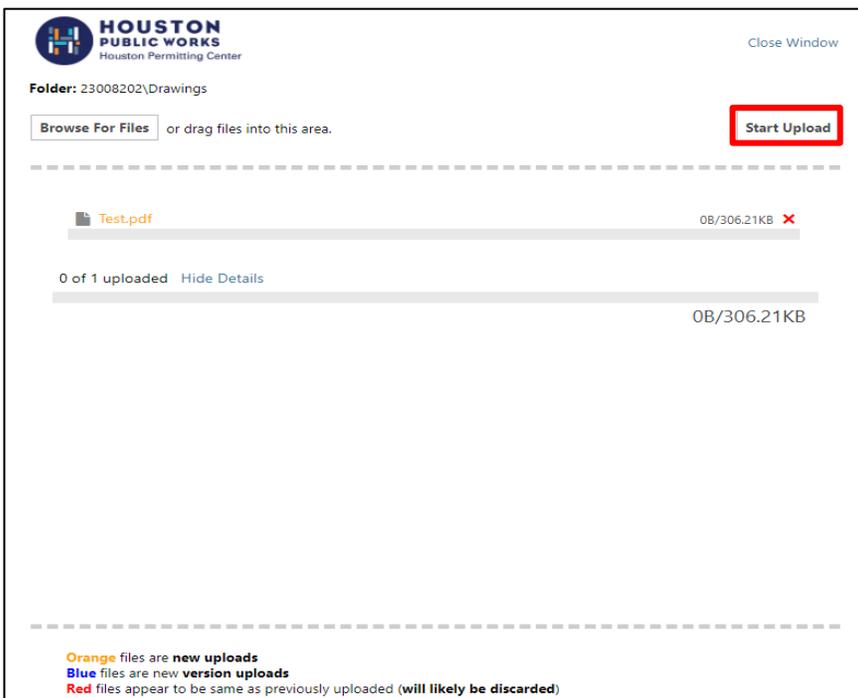
Uploading Your Files

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.

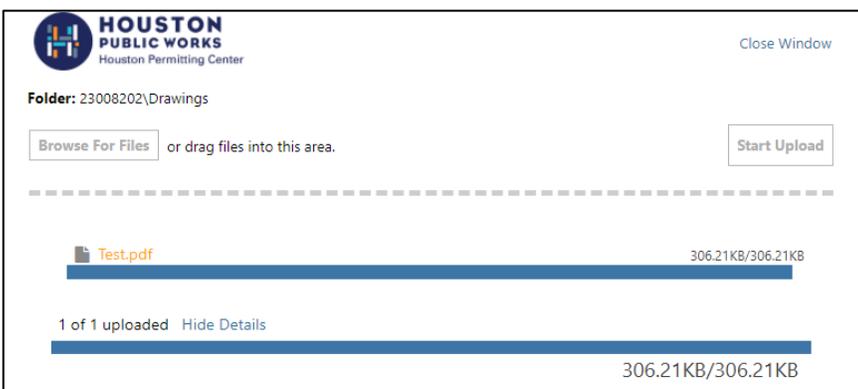


1. Select **Browse for Files** and navigate to the file or Drag & Drop your desired files.



2. Select the file and click Open.

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



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 shows the Houston Public Works Houston Permitting Center interface. The top navigation bar includes 'Home', a search icon, a 'Project' field with the placeholder 'Enter project name', 'All Tasks', 'All Reports', a user profile icon, and 'Logout'. Below this, the 'Files' tab is active, showing the project ID '23008202: TEST OCE #10' and the 'Main Contact: TEST ENGINEER'. The interface features a 'Refresh' button and an 'Upload Files' button. A toolbar contains various file management icons, with the delete icon (a trash can with a red 'X') highlighted by a red arrow. The file table below has the following data:

FILE NAME	STATUS	REVIEWED	UPLOADED	DATE	SIGNED
Contains...	Contains...	Contains...	Contains...	On...	
Test.pdf	New		Monica De Santiago	6/1/23 3:22 PM	Not Found

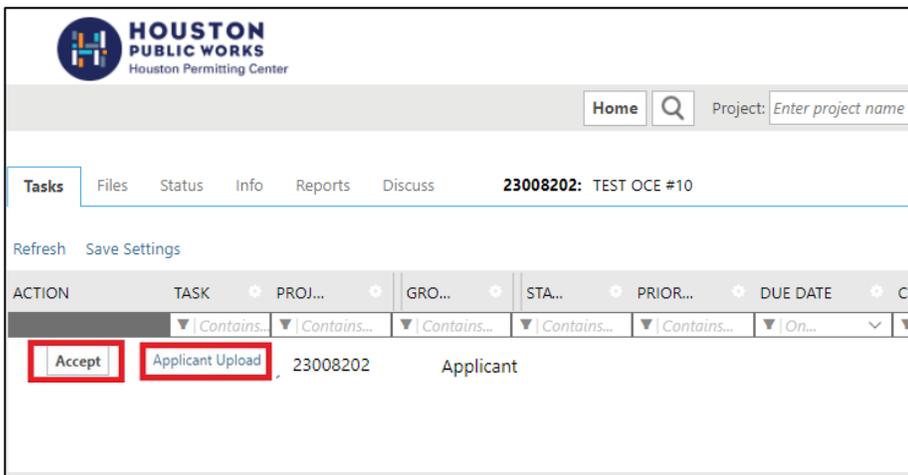
Complete Assigned Task

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.

The completion of one task signals ProjectDox to assign the next task in the workflow. Reminder notifications of an open (i.e. incomplete) task are sent via email at designated intervals.

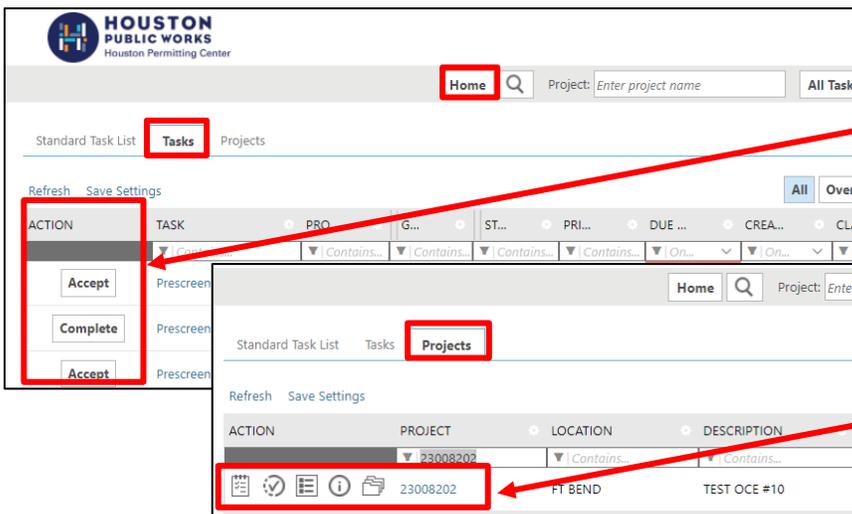
To notify the Office of the City Engineer that your plans are ready for the pre-screen review, the applicant **must complete** the assigned **Applicant Upload** task. The assigned task will show a status of *Pending* until you accept it.



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

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

The eForm will pop-up in a separate window.



Alternatively, tasks can be accessed via the **Task tab** on the Homepage. Under the **Action** column, select the **Accept** link for the corresponding project.

Tasks can also be accessed by using the **quick action icons** under the **Projects Tab**.

Complete Assigned Task

APPLICANT UPLOAD

The screenshot displays the 'APPLICANT UPLOAD' interface. At the top right, 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' section includes fields for 'Project Name', 'Project Description', 'Workflow', and 'Task Due Date' (6/12/23 2:38 PM). A blue instruction bar reads 'STEP 1 of 3: Select and upload your drawing and supporting document files into this project, as required'. Below this is a 'File Upload for:' section with a question mark icon. A box prompts the user to 'Select your files to upload to this folder:' with buttons for 'Select Files to Upload' and 'View Folders'. A folder named 'Documents (1 - 1 New)' is shown. Another blue instruction bar reads 'STEP 2 of 3: Check all to confirm you have completed this task and are now ready to submit'. A 'Confirmation' section with a question mark icon contains a red-bordered box around the text 'Selection is required.' and a checked checkbox with the text 'I have uploaded all required drawings and/or documents.'. A third blue instruction bar reads 'STEP 3 of 3: Click the "Submit" button below to complete your task'. At the bottom, there are two buttons: 'Submit' (highlighted with a red box) and 'Complete Later'.

Through the eForm, the main 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.

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

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

Pre-Screen Review

PROCESS OVERVIEW

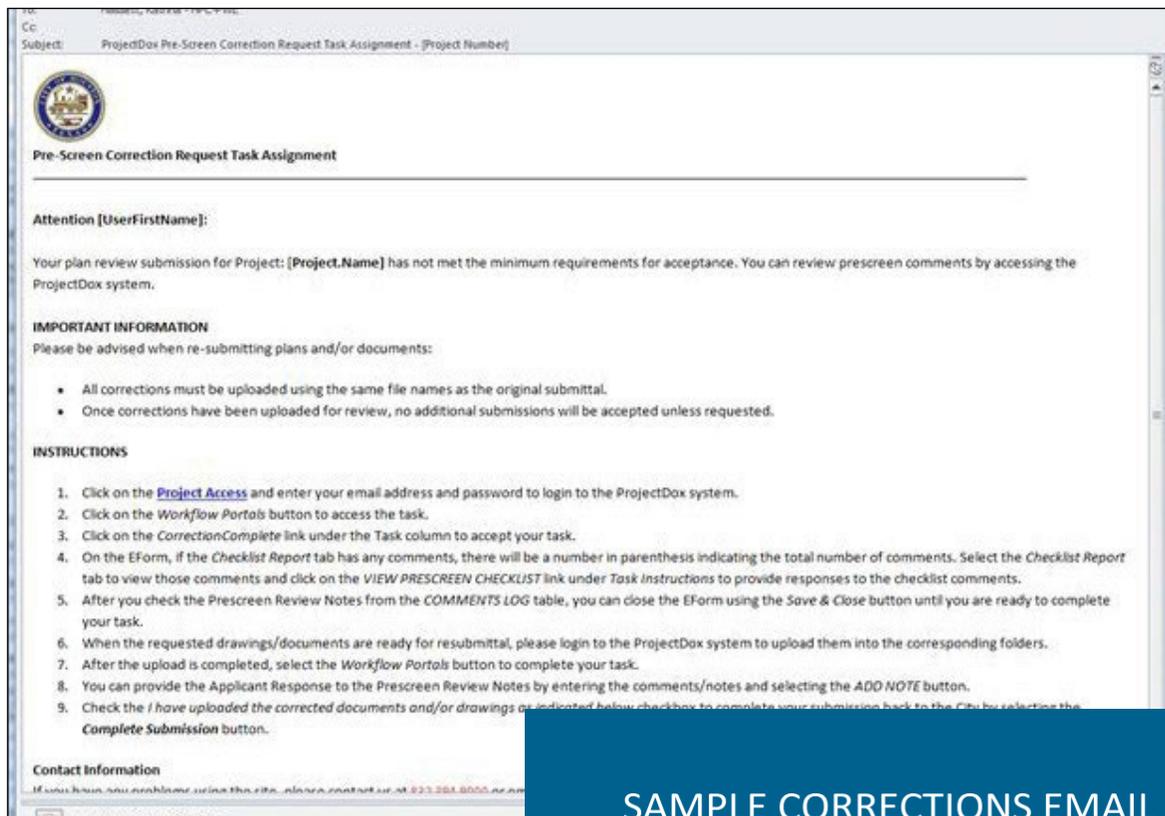
During the pre-screen review, the Intake group will review the uploaded files for completeness and compliance with the standards.

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

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

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

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



Pre-Screen Review

CORRECTION COMPLETE TASK

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

1. Select the **Project Access** link in the email to login to ProjectDox.
2. Click on **Accept** or Select the **Prescreen Resubmit Task** link for the appropriate project from **Task** tab on the home page or from within the project.
3. The eForm will pop-up in a new window. 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** - New version of a file previously submitted.
 - b) If you are uploading versioned files, Answer the following question...

Are your updated files named exactly the same* as the prior versions?	Yes	No
---	-----	----

- c) If **Yes**, follow the same procedures as the initial upload. ProjectDox will rename the file upon upload as a version of the original file.
 - d) 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.
 - e) **New Files** - New file, not previously uploaded and submitted.
5. You can invite the Design team into the project from the **Invite to Design Team** section
 6. Respond to the Prescreen Review Comments on the **Reviews** tab by entering the comments in the text box.
 7. On your eForm, select the check box ***“Response has been provided for all comments and files have been uploaded (if requested)”***
 8. Select the **Submit** button.

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

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

Pre-Screen Review

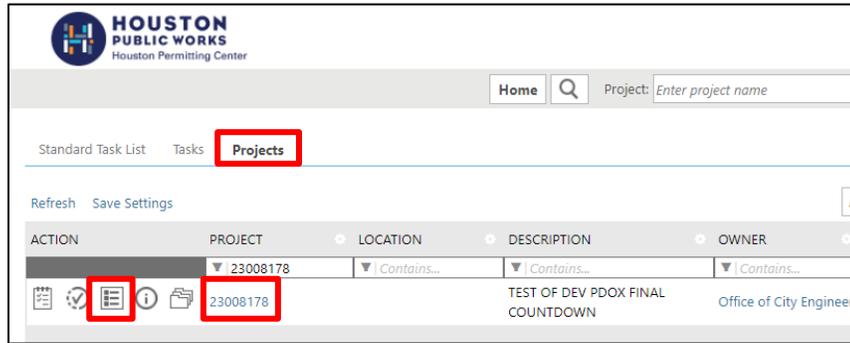
CORRECTION COMPLETE TASK

Note:

If new sheets are needed to be inserted/uploaded 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 on your comment box in Eform stating “sheets have been renumbered and sheets from previous sheets need to be moved.”

HOW TO RUN REPORTS IN PROJECTDOX



STEP 1

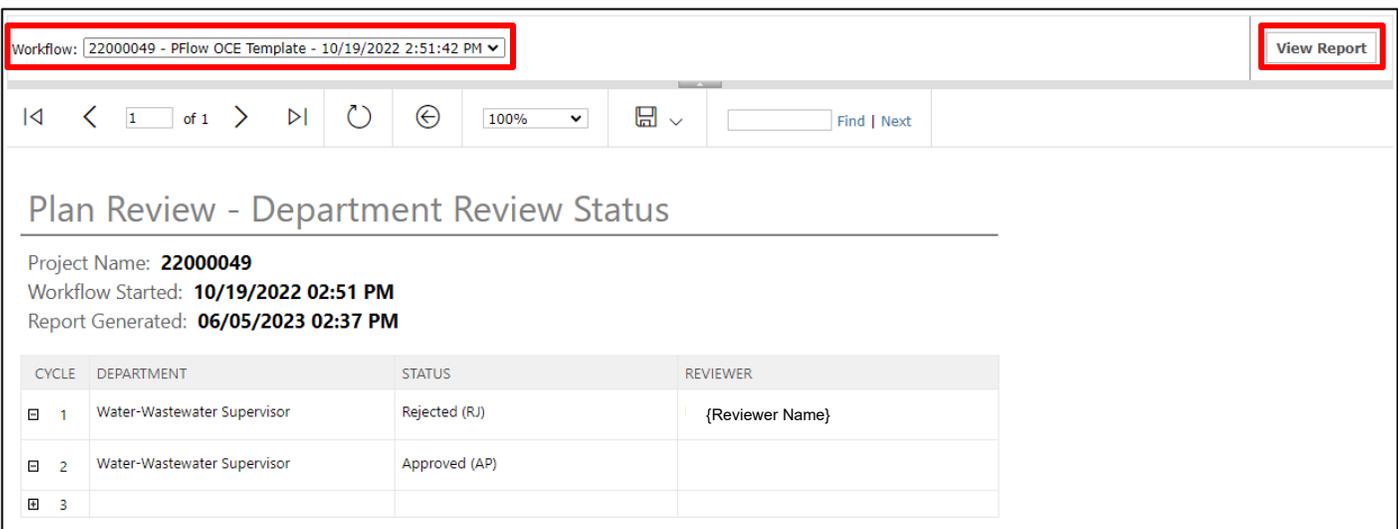
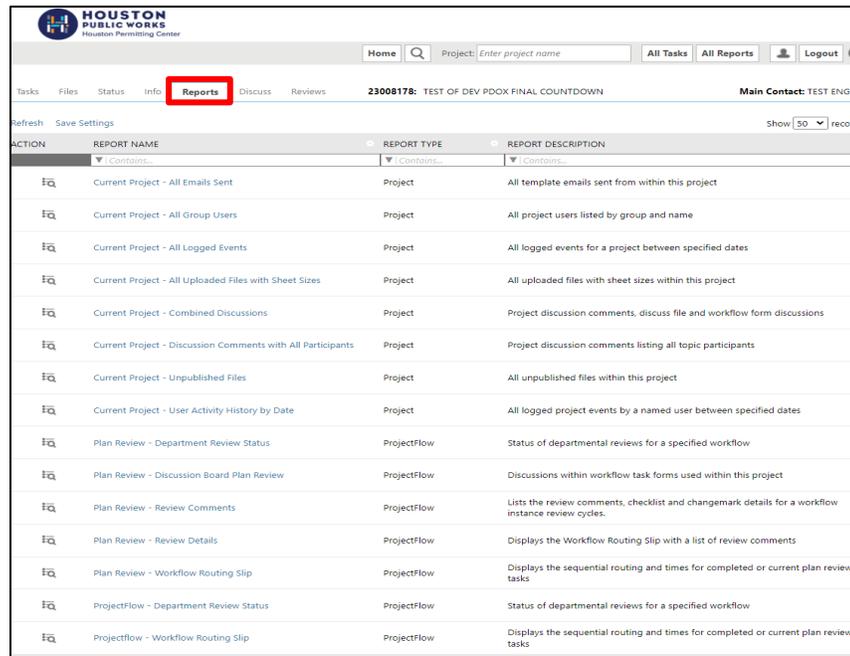
Log in to ProjectDox account and select the **Project** number or the **Projects Report** icon to run a report.

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.

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](#)

Review and respond online.

[Export to Excel](#)

[Import Excel Responses](#)

[Watch video](#)

Review and respond in Excel, then upload your responses.

Department Review Results

DEPARTMENT	REVIEWED BY	STATUS
Water-Wastewater 814	Enrique Leon - Enrique.Leon@houston.tx.gov	Rejected (RJ)

Review of Plans

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

Review and respond online. *Review and respond in Excel, then upload your responses.*

Department Review Results

DEPARTMENT	REVIEWED BY	STATUS
Water-Wastewater 814	REVIEWER NAME – EMAIL	Rejected (R)

ProjectDox - ProjectDox 9.2.3.9572 - Work - Microsoft Edge
 https://houston-tx.us.avolvedcloud.com/ProjectDoxWebUI/Project/ProjectCorrections?projectId=202662&workflowTaskID=2168692

Dept: Show All Status: Show All Response: Show All Search: Enter keyword Close Window
 Type: Show All Cycle: Show All Time: Show All

Refresh Watch video

Ref.#	Comment	Applicant	Date/Time	Cycle	Response
Ref.# 2	Question Inquiry	Enrique Leon	6/15/23 1:39 PM	Cycle 1	Type your response here.
Ref.# 1	Info Only Comment	Enrique Leon	6/8/23 2:06 PM		No response required.
Ref.# 3	Unresolved Comment	Water-Wastewater 814 Free Comment that can apply to overall sheet.	Enrique Leon	6/15/23 2:03 PM	Cycle 2 Type your response here.
Ref.# 4	Unresolved Markup	Water-Wastewater 814 C07 - Manhole Frame and Cover.pdf Comment applying to a particular area as noted by "sticky note".	Enrique Leon	6/15/23 2:04 PM	Cycle 2 Type your response here.
Ref.# 5	Info Only Comment	Water-Wastewater 814 Some comments are only informative and require no response.	Enrique Leon	6/15/23 2:07 PM	Cycle 2 No response required.

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

1. Log in to ProjectDox.
2. Select the **Applicant Resubmit Task** link from the *Tasks Section* on the homepage or from within the project.
3. Select **OK** to accept responsibility for completing the task.
4. The eForm will open.
5. If the engineers have added any markups to your drawings/documents, you can view the markups clicking 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.
6. You can view department status (approved/rejected/not applicable/assign only) under

the **Department Review Results** section.

7. When all comments have been addressed, upload the revised drawings/documents into the appropriate folders using the original file name(s).
8. 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.
9. Check the 2 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.*

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

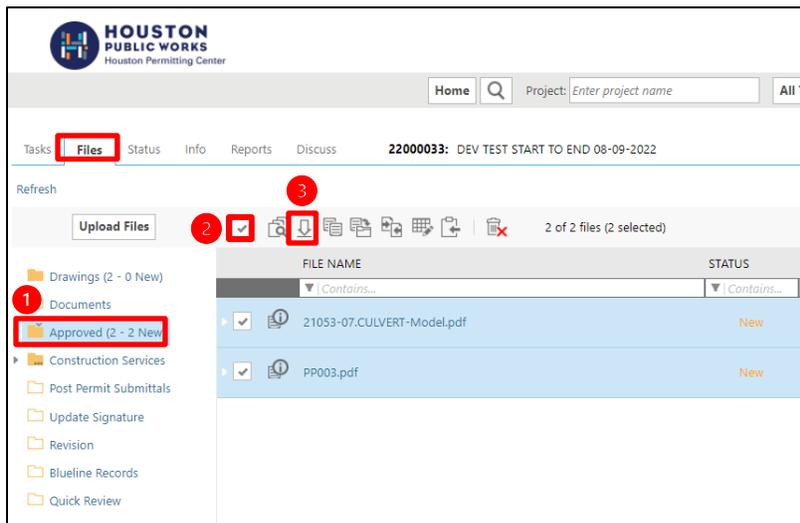
Note: If new sheets are needed to be inserted/uploaded and renumbering existing sheets is a must, you may:

- 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

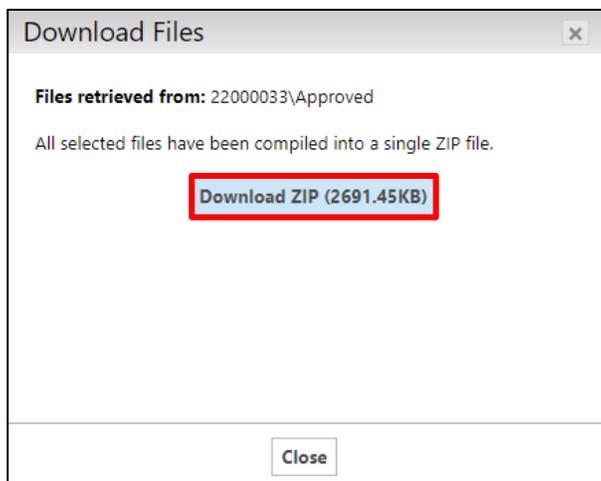
After the payment is made in iPermits system, you will receive an Approved Plans Ready for Download email indicating that you may login to ProjectDox and download your approved plans in the folder marked **Approved**.



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

The process for revision is as follows:

1. Email OCE@houstontx.gov with the request to re-open 'project number' for revision. At this time, if the applicant has changed within the same company, the new applicant email should be provided to be updated.
2. OCE will review request.
3. If eligible for revision OCE will re-open the project.
4. Cover sheet of revised project will have revision note calling out revision number, revision summary
5. Customer to upload cover sheet and revised sheets only to the "REVISION FOLDER".
6. Complete submittal task.

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

Revisions

PROCESS OVERVIEW

1. Email OCE@houstontx.gov the request for revision, project number, and if the applicant has changed.
 2. OCE Plan Review Admin will review revision request and if approved will re-open project for revision.
 3. Upload cover sheet and revised sheets only to revision folder.
 4. Cover sheet must have revision callout including revision number, short description, revised sheets and dated and initialed by Engineer of Record (EOR).
 5. Revised sheets must include revision note initialed and dated by EOR.
- Complete task, process will follow standard submittal procedures.



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

Update Signatures

PROCESS OVERVIEW

When updated signatures are required for a project already approved in ProjectDox, **the applicant can email 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.**

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

POST PERMIT SUBMITTALS (For

Floodplain Management Office):

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

CONSTRUCTION SERVICES

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



Thanks for using electronic plan review!

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



HOUSTON PUBLIC WORKS

Houston Permitting Center

1002 Washington Avenue
Houston, Texas 77002

832.394.9690

oce@houstontx.gov

www.houstonpermittingcenter.org