



**Bureau of Development Services**

ProjectDox Applicant User Guide

**Email:** [TClePlans@PortlandOregon.gov](mailto:TClePlans@PortlandOregon.gov)

**Website:** <https://www.portland.gov/bds/permit-review-process/eplans-applicant-training-videos>





## Disclaimer:

These materials are provided for training purposes only and are based on the current version of the software. Some procedures described may differ slightly when the software is updated.

Please email [BDSTraining@PortlandOregon.Gov](mailto:BDSTraining@PortlandOregon.Gov) with suggestions and/or feedback on this training.





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## Overview

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Prepare to save time and money by submitting plans online!

This Applicant User Guide is designed to help you understand the process of electronically submitting plans through **PDX ePlans** on the **ProjectDox** website. **ProjectDox** is an alternative to the paper-based and in-person submittal process with the Bureau of Development Services. **ProjectDox** is a web-based solution that allows building plans to be submitted electronically, improving the plan review cycle, reducing costs associated with obtaining residential and commercial construction permits, as well as supporting green initiatives.

The Applicant User Guide is a reference to find general information regarding the step-by-step processes for submitting plans online.

As you begin to navigate the new online system, please remember **we are here to assist you**. This guide is a general outline of the online process, so we understand users may have questions. Be sure to check out other educational resources located on our [YouTube Channel](#), including the full [Applicant Training Video Playlist](#). Please reach out to the appropriate department if you have further questions:

### Bureau of Development Services

<https://www.portland.gov/bds>

### ePlans Training Team

[TClePlans@portlandoregon.gov](mailto:TClePlans@portlandoregon.gov)

<https://www.portland.gov/bds/pdx-eplans-electronic-plan-review>

### Bureau of Development Services Intake Appointments

[BDSintake@portlandoregon.gov](mailto:BDSintake@portlandoregon.gov)

(503) 823-4094

<https://www.portland.gov/bds/apply-and-pay-your-permits-during-covid-19>

### Bureau of Technology Services

<https://www.portlandoregon.gov/bts/>

(503) 823-5199

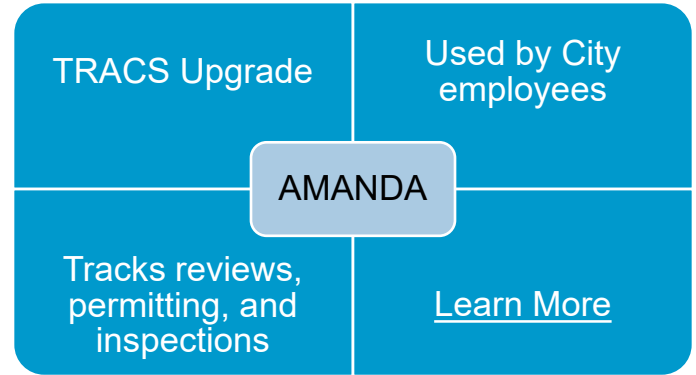
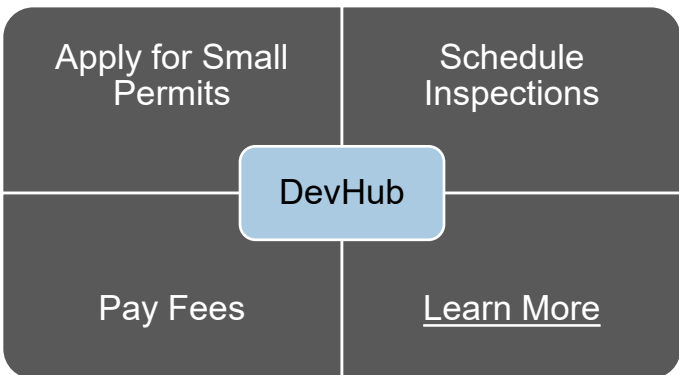
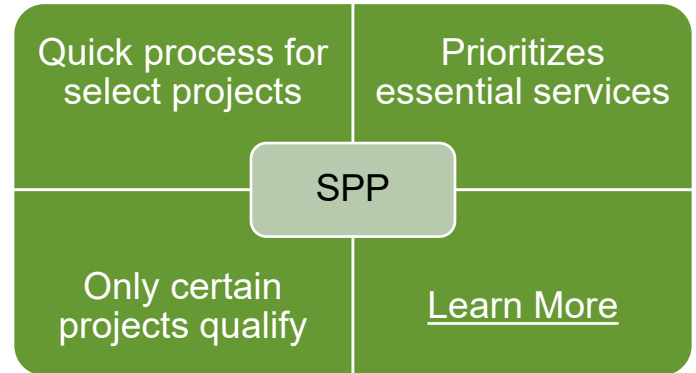
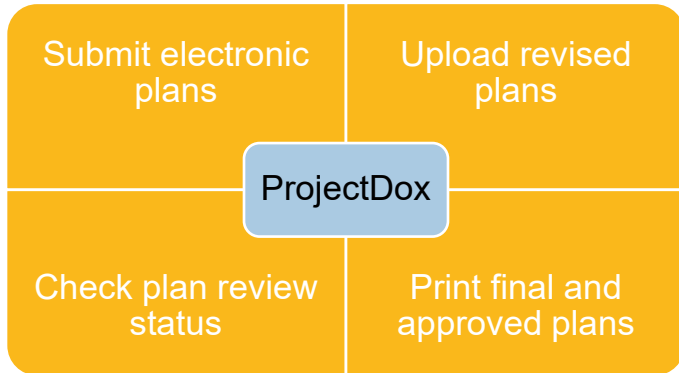
### Basic Permitting Questions/Picking Up Approved Plans

(503) 823-7357



## ProjectDox, Single PDF Process (SPP), DevHub, AMANDA

BDS uses various applications and process to process electronic plans. ProjectDox, Single PDF Process, and DevHub are used by customers, and the AMANDA system is used by City employees. The graphics below highlight the main differences between the process. Click the process name to learn more.



## Alternative Resources and Special Accommodations

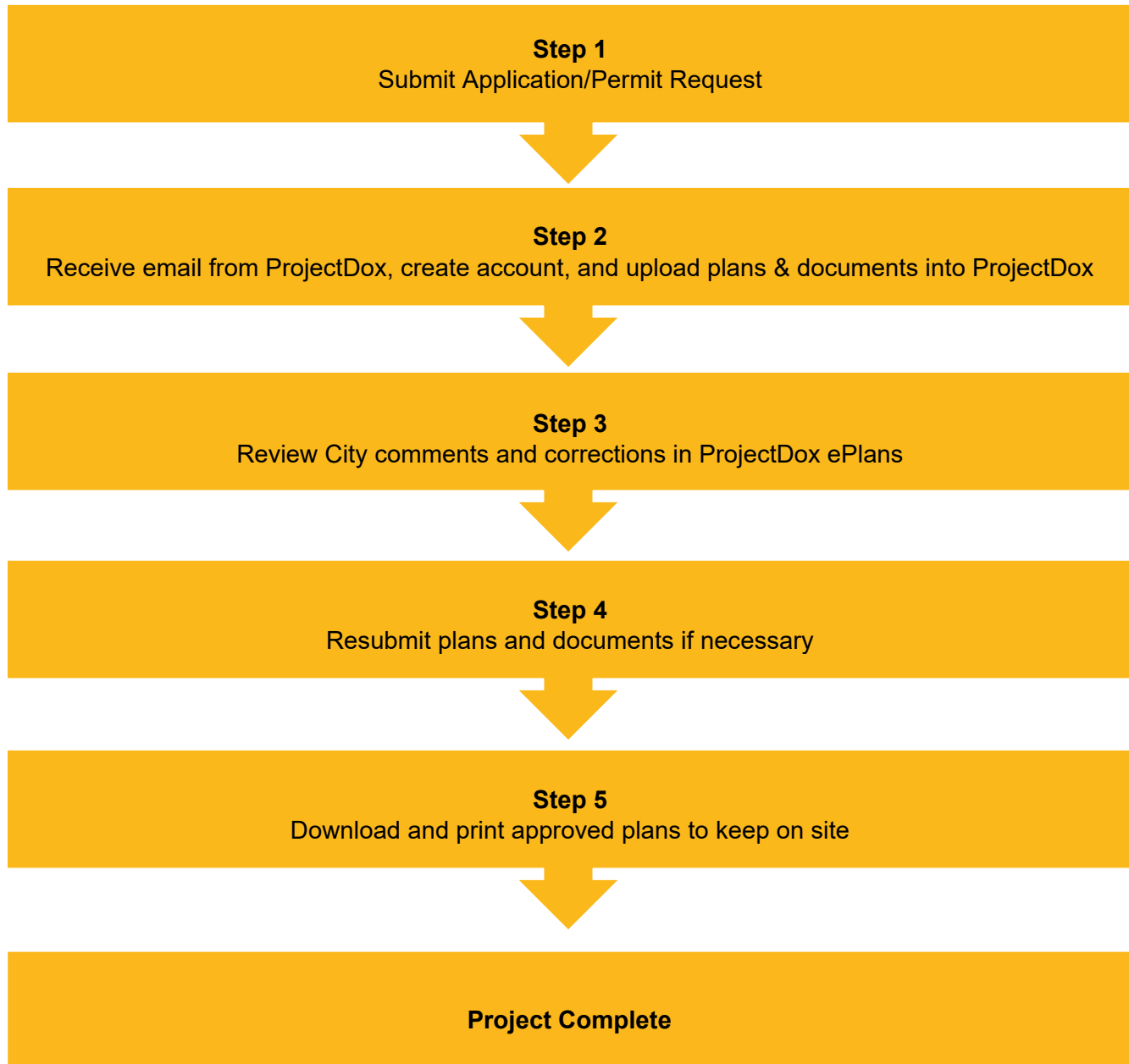
For requesting an accommodation under Americans With Disabilities Act (ADA) pertaining to City resources, please visit our [ADA request web page](#).

<https://www.portland.gov/request-americans-disabilities-act-accommodation>





## Step by Step Workflow for Applicants





# Getting Started

## Glossary of Terms

Here at the Bureau of Development Services, we want all applicants to feel comfortable and confident using the ProjectDox online portal. Whether a new homeowner or skilled architect, we understand that some terms can be confusing. Use this glossary when navigating the ProjectDox website and reading Reviewer comments.

• <b>Applicant</b>	External user of the ProjectDox System. Able to submit applications and files for Electronic Plan Review. Provide materials for electronic plan review.
• <b>Approval Stamp</b>	Allows City staff to apply digital stamps to multiple drawings. Automatically uploads them into the destination folder of choice.
• <b>Changemark</b>	During plan review, Changemarks are used to communicate changes or required updates to applicants. Changemarks are <b>tied to specific items or points on plan drawings</b> . They are also referred to as “markups” and live in a separate markup file or layer. They do not permanently alter or change drawings.
• <b>Checklist Items</b>	During plan review, Checklist Items are used to communicate information, changes or required updates to applicants. They allow reviewers to make comments and corrections to the <b>project as a whole</b> .
• <b>eForm</b>	Digital forms created within ProjectDox to request applicant reviews or resubmittal information.
• <b>ePlans</b>	<p>Electronic Plan Review. PDX ePlans is an electronic plan review and document management system used by The Bureau of Development Services (BDS).</p> <p>From the initial application to final approved plan sets, PDX ePlans provides a convenient, central location for development groups (including applicants and City reviewers) to communicate and complete the entire plan review process online.</p> <p>PDX ePlans also refers to the technology team that supports ProjectDox for the City of Portland.</p>
• <b>File Format</b>	A computer file type. Different file formats of plans and documents are accepted within the ProjectDox system.
○ <b>PDF</b>	Portable Document Format.
○ <b>DWG</b>	Drawing. Stores three-dimensional design data.





○ <b>DGN</b>	Design. CAD drawing file format.
○ <b>DWF</b>	Design Web Format.
• <b>Markup</b>	Please refer to “Changemarks” above.
• <b>Measuring Tools</b>	Used to measure lines and polygons found in drawings and plans.
• <b>Measure Takeoff Tool</b>	Same as Measuring Tools given the ability to keep one or many different running counts and cumulative measurements, and to save and export that data for use outside of ProjectDox.
• <b>Plan Reviewer</b>	Individual within a department or agency assigned the task of reviewing and commenting on a specific project.  For more information on Plan Review Groups, please visit the following site <a href="https://www.portlandoregon.gov/bds/article/80080">https://www.portlandoregon.gov/bds/article/80080</a> .
• <b>PDX ePlans</b>	Please refer to “ePlans” above.  PDX ePlans is the Bureau of Development Services’ (BDS) electronic plan review and document management system. Using a web-based tool called ‘ProjectDox’, ePlans provides a convenient central hub for development project groups (including applicants and City reviewers) to communicate and complete the entire plan review process online. Staff at BDS and our partner bureaus can review the plans simultaneously on their computer screens. And if customers need to make a correction to their plans, they can submit those corrections online for re-review, saving a trip to the Development Services Center.
• <b>Process Manager</b>	Single point of contact between the development team and the City permit review and inspection staff.  For more information on Process Management, please visit the following site <a href="https://www.portlandoregon.gov/BDS/48323">https://www.portlandoregon.gov/BDS/48323</a> .
• <b>Project Administrator</b>	Project Administrators in ProjectDox have the ability to make changes to a specific project. They are able to make edits and changes within a project, including adding and removing users to a project and editing user permissions.
• <b>Project Status</b>	Status of the overall project as determined by the administrator or workflow.  <b>Active:</b> In process, being reviewed, waiting for re-submittal, etc.  <b>Completed:</b> The review process is complete, and the plans will be electronically stamped by the City and will be available for download.







• <b>ProjectDox</b>	Web-based tool used by applicants and City Reviewers to complete an online application for certain permit types for new construction, revisions, and deferred submittals.
• <b>PDF</b>	Portable Document Format
○ <b>Standard PDF</b>	Digital file format used for documents, reports and other supporting non-drawing files, that were traditionally submitted in paper format.
○ <b>Vector PDF</b>	Digital file format that maintains AutoCAD layer and object information. This format allows a PDF to function similarly to an AutoCAD file.
○ <b>Searchable PDF</b>	PDF Searchable Image is a PDF Image Only document with the addition of a text layer beneath the image. This approach retains the look of the original page while enabling text search ability.
• <b>TRIM</b>	Complete ePlans documents are archived into TRIM by the work performed by the Digitization Team. BDS documents stored in TRIM are made available online to users via eFiles and Portland Maps. For the new permitting system, applicants will be able to submit documents electronically via the ProjectDox software.
• <b>Versioning Tools</b>	Allows users to compare two different versions of the same drawing, which speeds reviewers' work of verifying that requested changes have been made. Versions and related documents can be compared side-by-side, with variable-transparency overlays, and with color-coded difference overlays.
• <b>View Only Members</b>	View Only Members of ProjectDox have limited access to projects in ProjectDox. They will be able to view drawings and documents but will not be able to make changes to files, upload files, or delete files.



# Electronic Plan Submission

## Prior to Getting Started

Please complete the following prior to getting started:

1. Submit a Building Permit application to the designated group (i.e., Permitting Services, Process Manager, FPP, FIR, etc.)
  - a. Permit requests made in DevHub will be reviewed by Permitting Services to determine if they qualify for ProjectDox. Permit requests submitted through DevHub over 35 pages will be processed through ProjectDox; those 35 and under may qualify for a different process, such as the Single PDF Process.
2. You will be provided with your Permit number.

## Scannable Files

City Printing & Distribution is taking strict precaution during the COVID-19 pandemic. If you need paper files scanned before uploading to ProjectDox, you may make an appointment by calling the City Printing and Distribution main line at 503-823-4448.

Appointments are available Monday – Friday, 8 AM – 4:30 PM.

## Prepare Files for Submittal

Prepare your files for upload into ProjectDox by following the guidelines below. Please reference our [Quick Reference Guide on Preparing Files for ProjectDox Upload](#).

## Standards

Standards allow for easy identification of drawing by naming convention, vector file types to facilitate the most efficient review, color coding of comments for visual identification of departments, and so on.

## File Size

The accepted file size is 500 MB or smaller.

## Required Files

1. Drawing Files – all required drawings, as well as the initial page following City standards for submission. Each sheet/page of the drawings will be uploaded as a separate file in landscape view. All plans must be drawn to scale with the scale clearly indicated on the drawing. When applicable, files must be electronically stamped with a signature per Oregon Statutes and Oregon Administrative Rules.
2. Supporting Document Files – all other files that are required as part of the application submission that are not drawing files (i.e., Easement letter, Geotechnical report, calculations). These can be uploaded as multipage documents.





## Folder Structure

- All documentation (any non-drawing files, truss calculations, geotechnical reports, etc.) should be uploaded into the *Documents* folder for each project.
- All drawings should be uploaded to the *Drawings* folder for each project.
- All Reference only files should be uploaded to the *Reference only* folder for each project.

## Required File Formats

- PDF
- DWG
- DGN
- DWF

## Drawing File Naming Standards

Check out [our Quick Reference Guide on File Naming Standards!](#)

Check out [our video on Getting Started with PDX ePlans!](#)

Your file names should start with the appropriate number given the order and content specific to your application and submittal requirements. Please following these guidelines for the naming standards:

1. All files should be named according to their order listed on your provided index on the Title Sheet, Cover Sheet or Table of Contents.
2. Please make sure to have three sequential numbers before the sheet name identify the order of sheets.
3. Filenames for drawings submitted through ProjectDox should include the sequential three numbers and the first characters of the discipline name, followed by a 4-digit sheet number.
4. For REFERENCE ONLY files- please use the prefix 'REF' before the discipline letter and sheet number.

Example:

Sequential Display Order No.	Sheet Type	Sheet Name		File Name
001	A	02.02 THIRD FLOOR PLAN	=	001 A02.02 THIRD FLOOR PLAN
REF	REF	F 03.01 FP DETAILS	=	REF F03.01 FP DETAILS

5. Please limit the number of characters in the sheet name to 50 characters or less – abbreviations are acceptable and encouraged. Do not include “\_” (underscores) or special characters in the file name. Hyphens “-” and ampersands “&” are okay.





## Drawing Sheet Standards

Examples of acceptable sheet names

Drawing Type	File Name Letter	Example Sheet Names
Architectural	A	001 A02.02 Third Floor Plan
Civil	C	022 C03.01 GRADING PLAN
Electrical	E	031 E01.01 ELECTRICAL GROUND FLOOR
Fire	F	043 F01.01 FLOOR SPRINKLERS
General	G	004 G01.01 COVER PAGE
Hazardous Material	H	051 H01.01 OUTSIDE STORAGE
Interiors	I	073 I03.01 2nd FLOOR
Landscape	L	027 L01.01 MATERIAL PLAN
Mechanical	M	055 M02.01 SECOND FLOOR PLAN MECHANICAL
Operations	O	045 O02.01 GROUND PLAN
Plumbing	P	082 P03.02 DETAILS PLUMBING
Equipment	Q	091 Q01.02 DETAILS PLAN
Radon	R	064 R00.10 SPECIFICATIONS
Reference Only	REF	REF F03.01 FP DETAILS
Structural	S	077 S02.04 2nd FLOOR COLUMNS
Telecommunications	T	093 T00.00 TELECOMMS SYMBOLS LIST
Other Disciplines	Use letter(s) that best represent the drawing	039 AV01.01 AUDIO VISUAL
Contractor & Shop Drawings	Z	011 Z01.01 SHOP DRAWINGS



## File Sizes for Batch Stamp

Drawings submitted to ProjectDox must be the same sheet size in order for the Batch Stamp process to be successful. Preparing your files correctly before submittal will save time and remove the need for corrections.

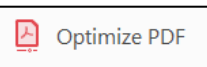
If you have files/drawings that are different sizes, follow the instructions below to make them all the same page size. This process can be completed in Adobe Acrobat.

1. Decide on a page size for all your drawings. We recommend using the largest page size in your portfolio.
  - a. For example, if you have three drawings 17x30, and one drawing 40x30, you will make all page sizes 40x30.

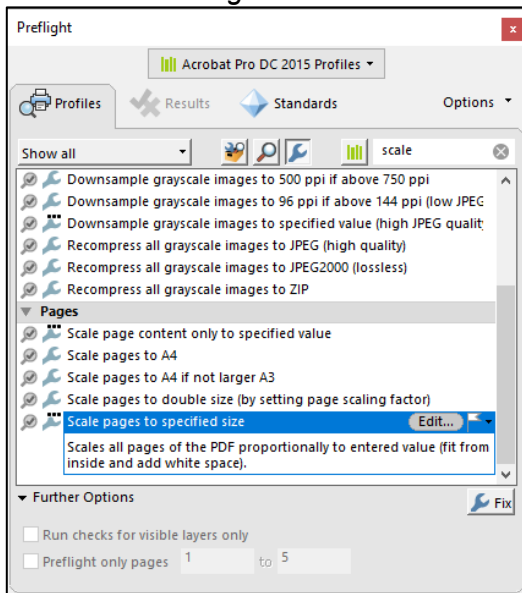
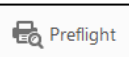
## Resize Files for Batch Stamp

1. Open your file in Adobe Acrobat

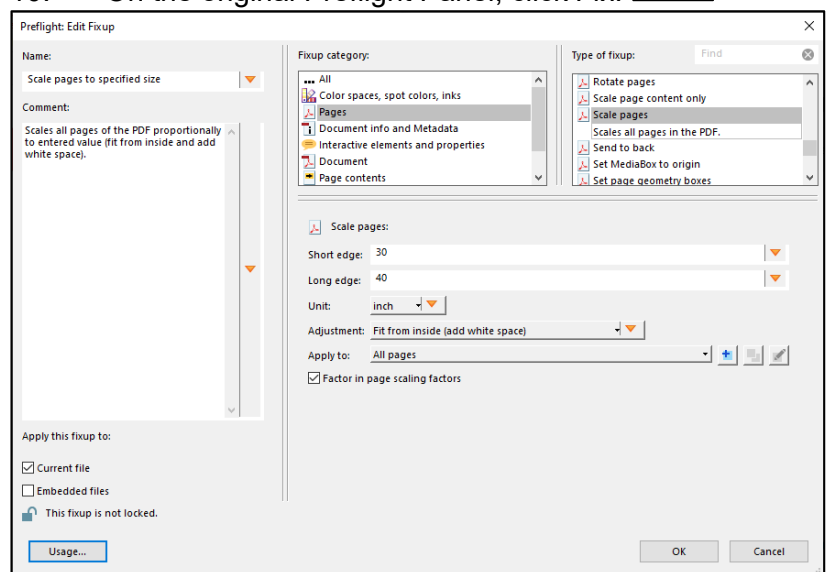
2. Select the *Optimize PDF* tool



3. Select *Preflight* in the tool bar



4. In the Preflight Panel, drop down the top menu and select Acrobat Pro DC 2015 Profiles.
5. Click the wrench icon for *Single Fixups*.
6. In the textbox, type *Scale*.
7. Select *Scale Pages to a Specified Size*.
8. In the pop up, change the edge size and select the correct unit of measurement.
9. Click OK.
10. On the original Preflight Panel, click *Fix*.





## Other File Standards

- Plans are not to exceed 36 X 48 E/O.
- Each file must be one page only. Multiple drawing pages will not be accepted.
- File name guidelines must be followed.
- There must be a sheet index for drawing files.
- Include a blank sheet in the drawings General section (G02.00 is recommended) labeled “City Information and Directives” for written information requested by reviewers.
- Affix third-party verified digital signature or seal to the project submission for the plans that are required to be signed and sealed.
- Please do not password protect, encrypt or ‘secure’ your files, as this will prohibit the ability to upload the documents into our archival system.
- The top right corner of all drawings must be reserved for the City’s electronic stamp. Please leave the top right corner completely blank on all drawings (with exception of the border).
- Dimensions: 3” width x 3” height, offset 4” from the right, 1” from the top right.
- Please divide structural calculations into volumes not to exceed 10 MB in storage.

## File Type Standards

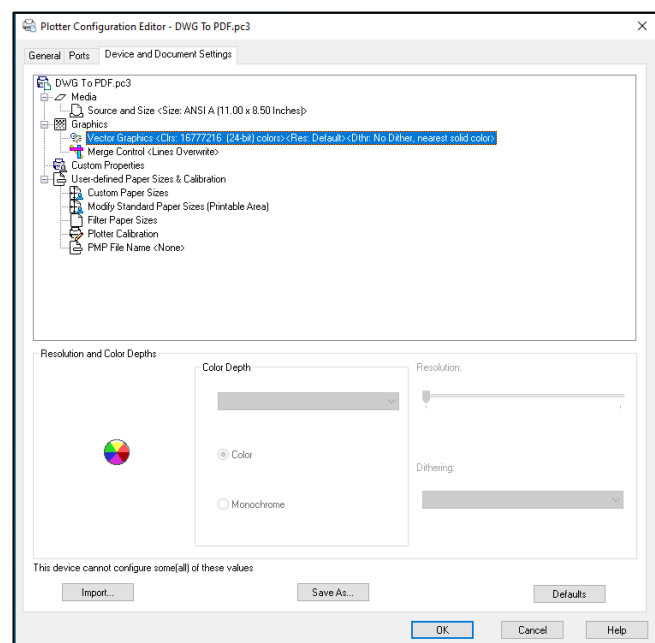
Supporting files may be PDF, other images, or Microsoft Office document formats. Please submit searchable PDF files for calculations, reports and other supporting documentation (non-drawing files).

Vector PDF files will be accepted for drawings. AutoCAD software is commonly used to create drawing files. It is recommended that drawings created in AutoCAD are converted to Vector PDF by using the Autodesk Vector Graphic Converter “DWG to PDF.pc3 plotter driver.”

For optimum performance please save PDF files as a 'reduced size file' and optimize files to eliminate attached metadata.

Clean and purge all extraneous layers from drawings, minimize the amount of hatching and/or convert to a less processor-intensive format type.

Minimize the number of layers included in the drawings (100 or less is recommended) and please try to keep the file size under 500 MB while maintaining image quality so reviewers can easily open and navigate within the files.





If drawings are electrical, mechanical, or plumbing/gas, confirm that only the trade lines are dark by changing the background to grayscale prior to saving as a vector PDF file.

### Markup Name and Color Standards

- Reviewers will make their comments and Changemarks (also known as *redlines*) using the markup tool.
- Standard markup names and colors will be used for each reviewing department for easy identification. A markup can have one or more Changemarks. Changemarks are created to quickly identify a markup and associated comments.
- Corrected files should always be re-submitted with the **same file name** as the original submittal.

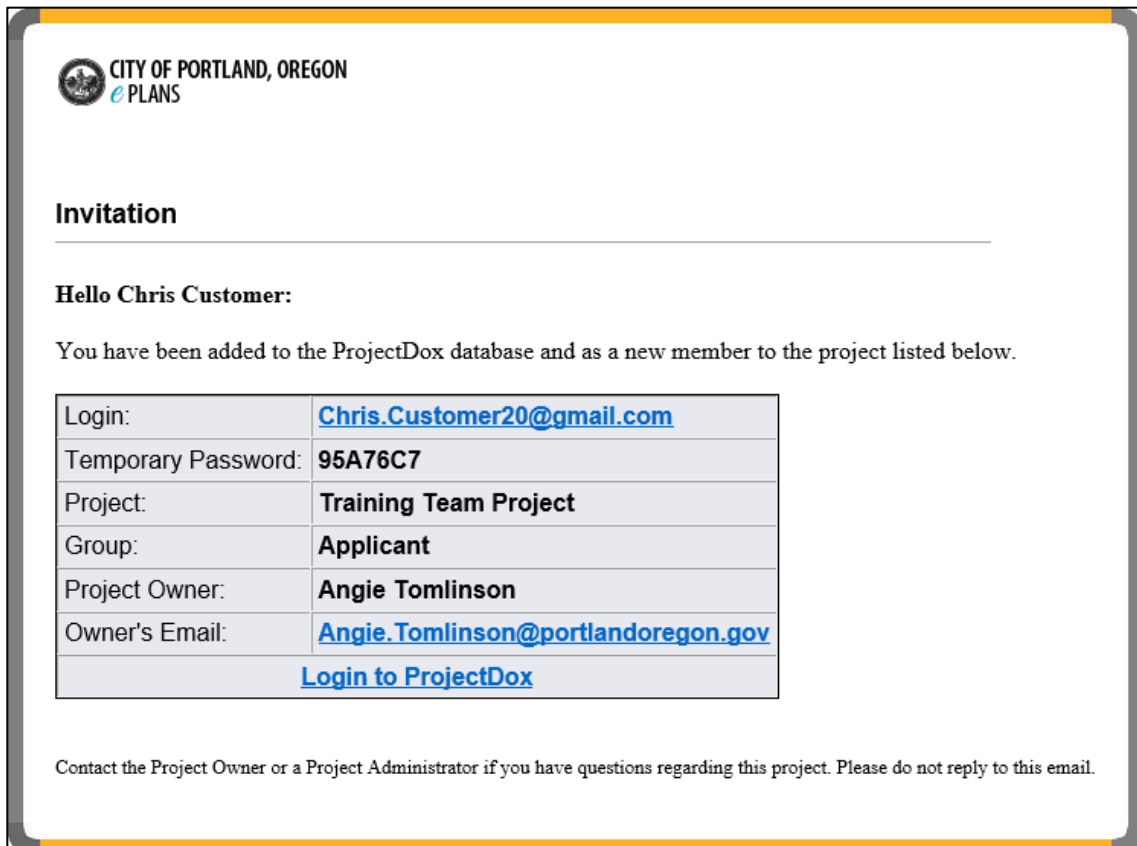
REVIEW AGENCY	MARKUP NAME	MARKUP COLOR
Erosion Control	SITEC	Purple
Urban Forestry	UF	Dark Green
Plumbing (Trades)	COPT	Dark Blue
Addressing	ADDR	Neon Green
Planning & Zoning	P&Z	Yellow
BES Development	BESDEV	Light Green
BES Pollution Prevention	BESPP	Light Green
Transportation Development Review	PBOTDR	Orange
Water Available	WAVAIL	Dark Blue
Life Safety & Energy Code	LSEC	Pink
Structural	STR	Brown
Water Quality Backflow	WQBF	Light Blue
Site Development	SITDEV	Purple
Fire	FIRE	Red



# Login to ProjectDox – Accessing Your Project

## ProjectDox Invitation

When your application is processed and put into the City's permitting system, a ProjectDox Review invitation will be sent to your email address from [ProjectDox@portlandoregon.gov](mailto:ProjectDox@portlandoregon.gov). The email will contain your login information and information about your project, including a link to the project.



*Example Email*

## Logging into ProjectDox

### New Users

Prior to logging into ProjectDox, the following actions must be completed

1. Disable pop-up blockers on your browser for the ProjectDox web address.
  - a. The indicator this has not been done will occur when you type in your login information, **click Login**, and the page immediately disappears.
  - b. It is not uncommon to have more than one pop-up blocker installed.





2. The login page has a Microsoft Silent Install (MSI) component required to install all the necessary ProjectDox ActiveX controls. This installation will *only need to be done once per browser*; if you utilize a different computer it will require another installation. Component install link can be found in the screenshot below.

## Signing in

1. Log in to ProjectDox at <https://eplans.portlandoregon.gov>, preferably using Microsoft Edge, Google Chrome, or Mozilla Firefox.
2. Enter your email address and temporary password and **click** the *Login button*, as shown below. Also shown below is the link to **click** to install the *MSI component*.

Electronic Plan Review

The City of Portland ensures meaningful access to city programs, services, and activities to comply with Civil Rights Title VI and ADA Title II laws and reasonably provides: translation, interpretation, modifications, accommodations, alternative

**CITY OF PORTLAND, OREGON**  
ePLANS

E-mail:

Password:

Login

[Forgot your password?](#)

© 2021 Avolve Software. ProjectDox (Version 9.1.9.3) is a trademark of Avolve Software. All rights reserved.

**ProjectDox**

To add ProjectDox to your favorites  
[Click here](#)

**Note:** When presented with a sign-in conflict at login, choose the first option to sign out of the previous session unless it needs to remain active.

3. Enter your new password and reconfirm the new password and personal account information. Yellow highlighted fields are required but a full profile record is ideal.



#### 4. Click the *Save* button.

**CITY OF PORTLAND, OREGON**  
ePLANS

**Electronic Plan Review**

Home | All Tasks | Profile | Logout

Highlighted fields are required and must be completed before continuing.

**Profile Information**

Welcome to ProjectDox.

Since you currently have a temporary password, you will need to change it to a permanent password and (if you have not done so) enter a security question and answer. This question/answer will be something that only you know, and will enable you to reset your password if you ever forget what it is.

**Change Password:**

New password: \* [text field]  
Confirm new password: \* [text field]

**Password Reset Question & Answer:**

Security question: \* [text field]  
Security answer: \* [text field]

**Contact Information** | User Metadata | Project Membership | Group Membership

\* Required field

Save

First Name: \* Debbie | Last Name: \* Developer

Email: \* debbie.developer@gmail.com

Title: \* [text field]

Company: \* [text field]

Address 1: \* [text field]

Address 2: [text field]

City: \* [text field]

State/Province: \* [dropdown] | Postal Code: \* [text field]

Phone: \* [text field] | Fax: [text field]

Mobile: [text field] | Pager: [text field]

Stamps: [text field]

Language: \* en

### Returning Users

- Log in to ProjectDox at <https://eplans.portlandoregon.gov>, preferably using Microsoft Edge, Google Chrome, or Mozilla Firefox.
- Use your full email address and password.
  - If you have forgotten your password, **click** on the *Forgot Password* button. This will only work if you have logged in once already and have a security question to answer.

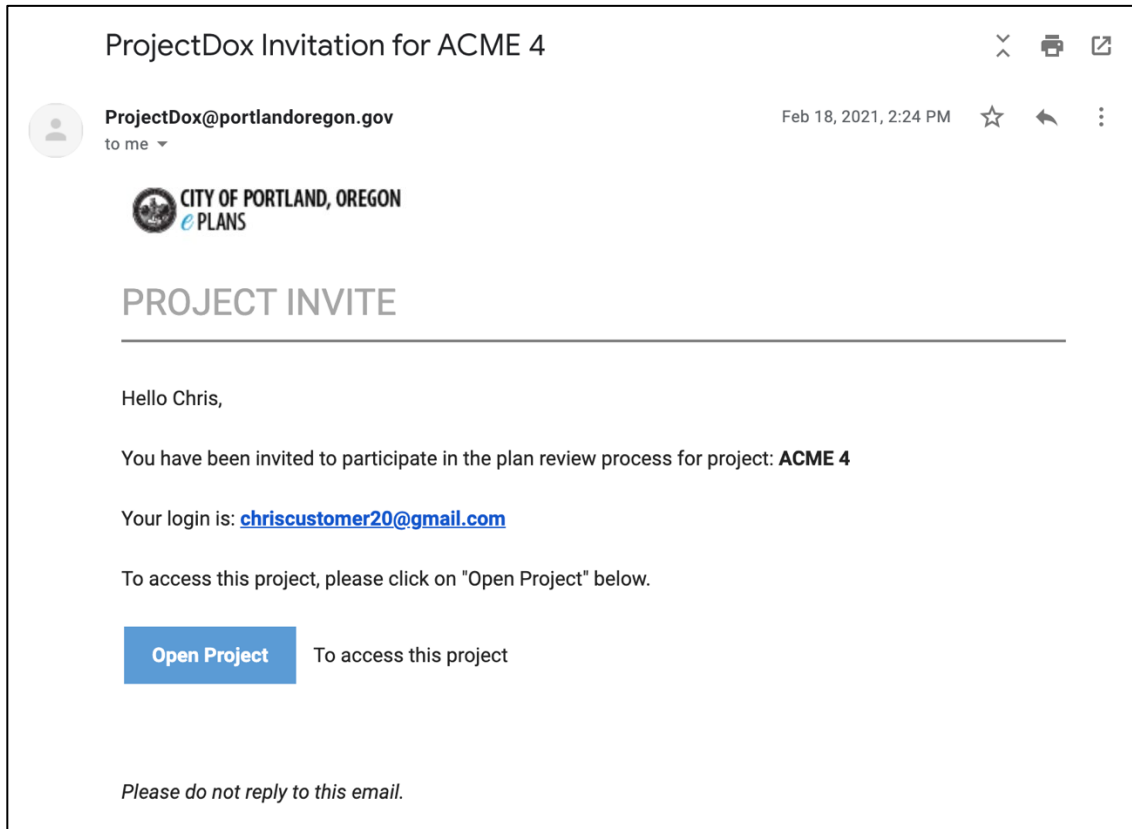
**Note:** ProjectDox session will timeout after 8 hours of inactivity.



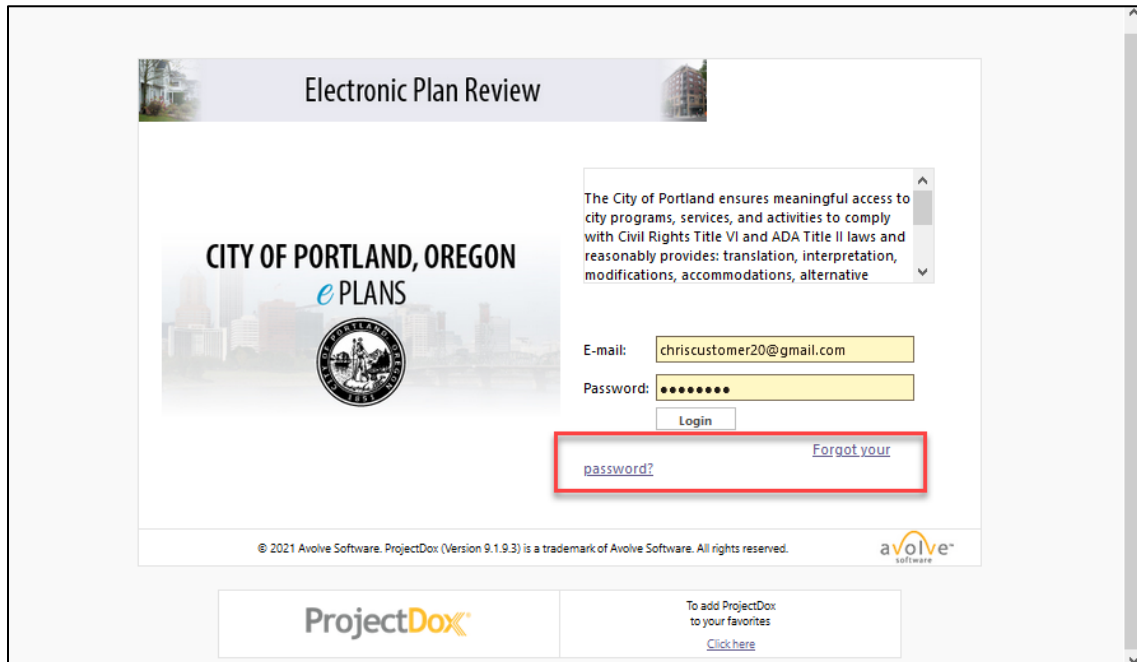


## Project Invitation







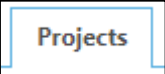
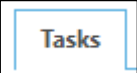
1. Applicants invited to new projects will receive the email below. **Click *Open Project*** to log in to ProjectDox and access being the Applicant Upload Process.



## Navigation



The main navigation buttons are located in the upper right corner. The image below will help you become familiar with the ProjectDox home screen.

	The <b>Home</b> button takes you back to this home screen.
	The <b>Search</b> button opens a window to search for project files. This is helpful when you are managing many projects.
	The <b>All Tasks</b> button opens a list of assigned tasks for all users.
	The <b>Profile</b> button allows you to change your password and account details.
	The <b>Logout</b> button logs you out of ProjectDox.
	The <b>Help</b> button opens a searchable help window.
	The <b>Projects</b> tab opens a list of projects the user has access to.
	The <b>Tasks</b> tab opens a list of current tasks for all projects.



## Uploading Files


Applicants can upload files two ways: Through the Applicant Upload Assignment Task eForm, or through the project's File tab.

After being invited to a project in ProjectDox, Applicants begin the Applicant Upload Process.

Please use the [File Naming Standards](#) guideline to ensure your files will be properly submitted and reviewed.

Applicant Upload Assignment for ACME 4

Inbox x



ProjectDox@portlandoregon.gov


to me ▾

Fri, Feb 19, 10:15 AM

☆

↩

⋮



**Applicant Upload Assignment**

Attention Chris:

You have been assigned a task on Project: **ACME 4 - ACME 4. Training project**

The due date for this task is: **2/26/2021 10:15:20 AM**

Please [Login to the City of Portland ePlan Website](#) to begin your task.

Project:	ACME 4
Description:	ACME 4. Training project
Task:	Applicant Upload
Process Manager:	Kurt Abe ( <a href="mailto:Kurt.Abe@portlandoregon.gov">Kurt.Abe@portlandoregon.gov</a> , 5038235321)
<a href="#">Project Access</a>   <a href="#">Login to ProjectDox</a>	

For any technical issues or questions related to this application, please contact your BDS Process Manager.

Please do not reply to this email.





- Applicants will receive an email inviting them to begin the Applicant Upload Task. **Click Login to the City of Portland ePlans Website** to begin the task.
- On the ProjectDox home screen, **select** the *Projects* tab. Any project that you have access to will be displayed under the *Projects* column.
  - The *Tasks* tab is the other option. In the Tasks tab, all tasks you have been assigned for all projects will display. This is another way to quickly access and complete your tasks.
- By default, the projects are listed by descending order of create date. Change the listing criteria using the following functions with any column displayed on the Projects grid:
  - Typing in key words, like the name of the project, in the *Contains...* textbox.
  - Clicking the *filter icon* next to the *Contains...* textbox and choosing your filter preference.
  - Clicking on the *column name* to sort by ascending or descending beginning letter.
- Click** the *project name* where the Applicant Upload Task has been assigned.

ACTION	PROJECT	DESCRIPTION	OWNER	STATUS	CREATE DATE
	ACME 7	ACME 7 - Training	Terry Technician	Technical Prescreen	2/19/21 10:28 AM
	ACME 6	ACME 6	Terry Technician	Technical Prescreen	2/19/21 10:20 AM
	<b>ACME 4</b>	ACME 4. Training project	Kurt Abe	Applicant Upload	2/18/21 2:13 PM
	ACME 3	ACME 3. Training project	Terry Technician	Second Screen Resubmit	2/17/21 9:12 AM
	21-OTEST0-XX-XXX	Training Team Standard Workflow Project - TEST	Angie Tomlinson	Applicant Upload	1/15/21 3:23 PM

## Uploading Files through the Applicant Upload Assignment Task

- Click** the *Task Tab*. The *Applicant Upload Task* will be available.
  - By clicking *accept* or the *Applicant Upload task* name, you are accepting responsibility for completion of the task. Choose either to begin the task.



CITY OF PORTLAND, OREGON  
ePLANS

Home  All Tasks Logout

**Tasks** Files Status Info Reports **ACME 4: ACME 4. Training project**

Refresh Save Settings All Overdue Priority Show 9 records

ACTION	TASK	PROJECT	GROUP	STATUS	PRIORI...	DUE DATE	CREATED	DESCRI...
		ACME 4	Applicant	Pending	Medium	4/6/21 3:39 PM	3/30/21 3:39 PM	ACME 4. Training project

1 - 1 of 1 records Prev 1 Next

**Workflows**  
Refresh

NAME	COORDINATOR GROUP	STATE	INTEGRATION MODE	VERSION	STARTED	COMPLETED
ACME 4 - Building Permit CO - Standard - 2/19/2021 10:15:19 AM	Project Administrator	Active	Production	Copy of Workflow after 9_2 upgrade (Version 3)	2/19/21 10:15 AM	

1 - 1 of 1 records Prev 1 Next

2. The Applicant Upload eForm will open in a new window (make sure your browser's pop-up blocker is disabled).
  - a. *Task Instructions* will display in every eForm, providing information on how to complete the current task. **Click *Learn How*** to watch instructional videos on to complete the task.
  - b. **Click the *question mark icon*** for quick information on the task instructions.

**STEP 1 of 3:** Select and upload your drawing and supporting document files into this project, as required

File Upload for: Applicant Training Videos

Please click appropriately for the **type of files** you are uploading. [Learn how](#)

Uploaded files:

No files uploaded yet.

- c. After reading the instructions, scroll down on the eForm.





ACME 4 - ProjectDox

Applicant Upload

eplanstest.portlandoregon.gov/ProjectDoxWebUI/WorkflowForms/Eform.aspx?wflowTaskID=6916&RemoteInvoke=false

# APPLICANT UPLOAD

ProjectFlow BUILDING avolve software

**Task Information** Group Management

Task Information

**Project Name:** ACME 4  
**Project Description:** ACME 4. Training project  
**Coordinator:** Angie Tomlinson  
**Workflow:** BLD - Standard Workflow  
**Current User Login:** Chris Customer (chriscustomer20@gmail.com)  
**Task Due Date:** 4/6/21 3:39 PM

**Task Instructions** [Learn how](#)

- Please review the [applicant training videos](#)
  - Additional information about the [eplans review process](#)
- Please ensure all files follow the proper naming convention.

Upload Complete - Submit to City of Portland **Save For Later**

2/19/2021

3. The task does not need to be completed all at one. If you want to pause your progress, **click Save For Later**.
4. Have your files ready for upload, sorted by drawings, documents, and reference only. **Click** the upload button for the appropriate folder. For this example, we will **click Upload Drawings**.





**STEP 1 of 3:** Select and upload your drawing and supporting document files into this project, as required

File Upload for: ACME 4 ?

Please click appropriately for the **type of files** you are uploading. [Learn how](#)

**Upload Drawings** **Upload Documents** **Upload Reference Only**

Uploaded files:

No files uploaded yet.

**STEP 2 of 3:** Check all to confirm you have completed this task and are now ready to submit

Confirmation ?

☐ \*Upload Task Complete (I have uploaded all required drawings and/or documents) \*Required

**STEP 3 of 3:** Click the "Upload Complete - Notify City of Portland" button below to complete your task

**Upload Complete - Submit to City of Portland** **Save For Later**

5. There are two ways to upload files: **click *Browse for Files*** and search your computer or drag and drop files into the pop up.
  - a. You can upload up to 100 files at a time.

File Upload

eplanstest.portlandoregon.gov/ProjectDox/Html5Upload.aspx?ProjectID=4295&FolderID=28141

**CITY OF PORTLAND, OREGON** **Test Site** [Close Window](#)

**Folder:** Applicant Training Videos\Drawings

**Browse For Files** or drag files into this area. **Start Upload**

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

6. File names are color coded depending on the upload status.
  - a. Reference this key at the bottom of the upload window to verify files are versioned correctly.





- b. New files are orange; new versions are blue; duplicate files without changes that will not version are red and will likely be discarded.

- 7. **Click Start Upload.**
- 8. A green verification will pop up when the files successfully upload.
  - a. Continue the same steps to upload documents and reference only files.

- 9. To complete the eForm, verify that your upload is complete by **selecting** the checkbox.





10. Click *Upload Complete – Submit to the City of Portland*.

Select folder to open file list.

- ▶ Drawings (22 - 22 New)
- ▶ Documents (7 - 7 New)
- ▶ Reference Only

**STEP 2 of 3:** Check all to confirm you have completed this task and are now ready to submit

Confirmation ?

☒ \*Upload Task Complete (I have uploaded all required drawings and/or documents) \*Required

**STEP 3 of 3:** Click the "Upload Complete - Notify City of Portland" button below to complete your task


Upload Complete - Notify City of Portland

## Uploading Files through the Project's File Tab

Another way to upload files is through your project's *Files* tab. Files uploaded through the *Files* tab will not notify the City of Portland. After upload, please return to the task eForm, verify the upload is complete, and submit to the City of Portland.

1. **Click** the *Files* tab to access all files in the project. Choose between different folders to upload drawings, documents, or files for reference only.









 CITY OF PORTLAND, OREGON  
ePLANS


[Home](#) [Q](#) Project:  [All Tasks](#) [User](#) [Logout](#) [?](#)


[Task](#) **[Files](#)** [Status](#) [Info](#) [Reports](#) **ACME 4: ACME 4, Training project**


Refresh

[Upload Files](#) ☐      0 of 0 files (0 selected)

 Drawings

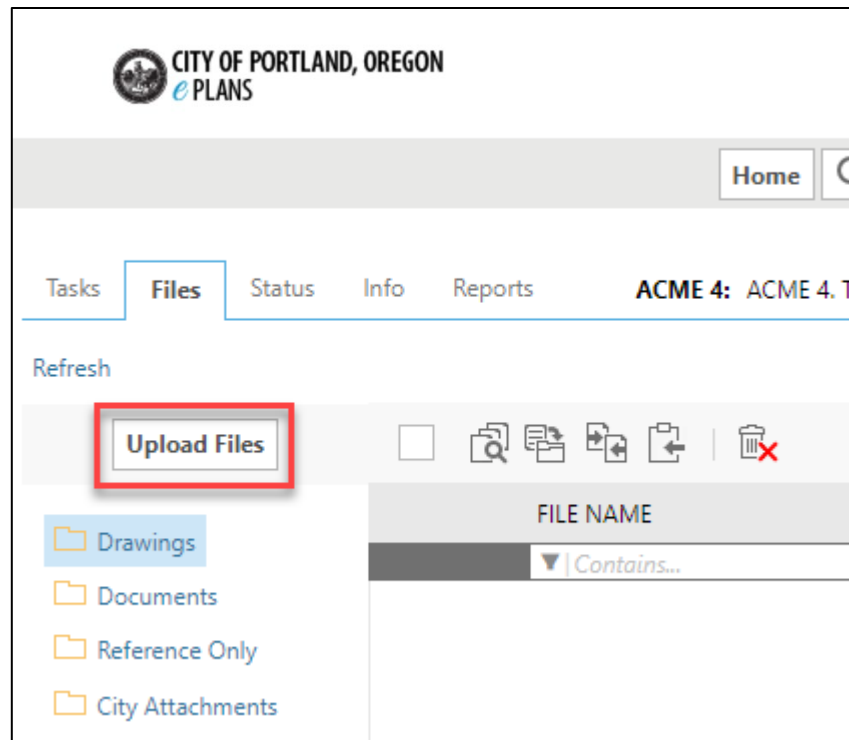
 Documents

 Reference Only

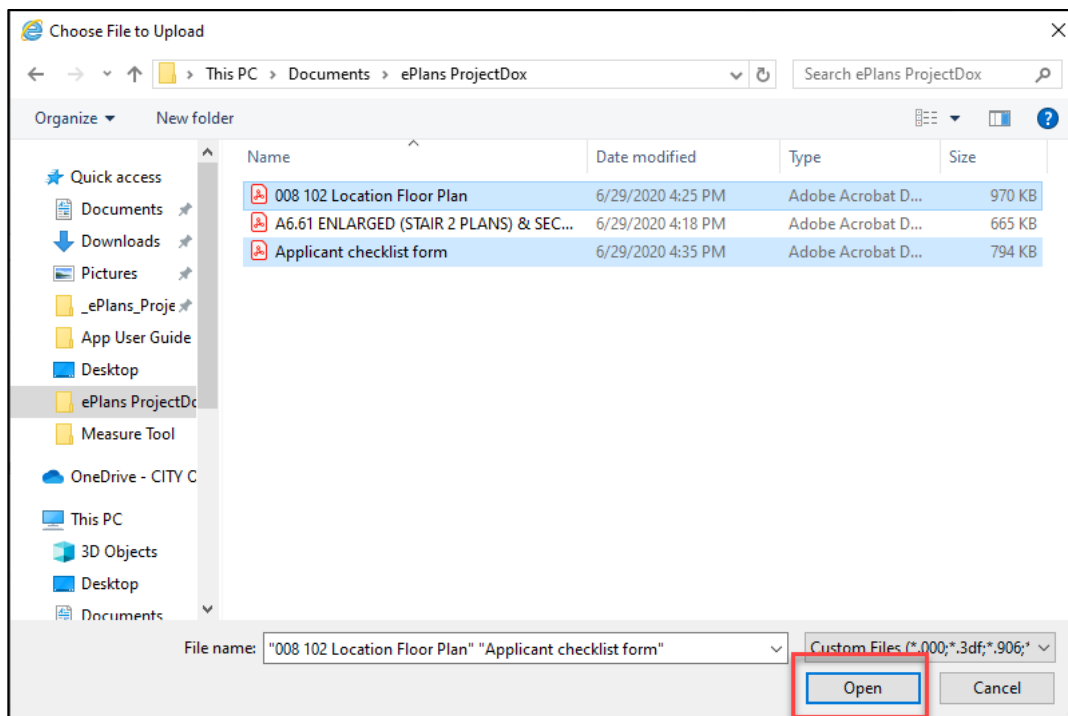
 City Attachments

FILE NAME	STATUS	REVIEWED	UPLOADED	DATE
▼   Contains...	▼   Contains	▼	▼   Contains	▼   Or ▼

2. Select the appropriate folder for the files that are ready for upload. After clicking into the correct folder, **click *Upload Files***.



3. **Select** files to upload by either clicking the *Browse* button or dragging and dropping files into the window.
  - a. **Select** multiple files by using your *Shift* or *Control* key.





4. **Select Open** to add the files to the Project folder.
5. Once the files are listed in the file upload window, **select Upload Files**.
6. Once complete, **select Close**.

Files uploaded through the **Files** tab will not complete the task.

Please return to the task eForm to submit the newly uploaded files.

## Viewing Uploaded Files

All uploaded files are found in the Project's *Files* tab. Click the folders to view the uploaded files and see more file information.

CITY OF PORTLAND, OREGON  
ePLANS  
**Test Site**

Home Search Project:  All Tasks Logout ?

Tasks **Files** Status Info Reports Reviews **ACME 4.: Testing** Main Contact: Chris Customer

Refresh

18 of 18 files (0 selected)

FILE NAME	STATUS	REVIEWED	UPLOADED	DATE
Contains...	Contains...		Contains...	On...
<input type="checkbox"/> 1..6 Site Plan.pdf	New		Chris Customer	5/5/21 11:50 AM
<input type="checkbox"/> 1.6 Site Plan.pdf	New V2		Chris Customer	3/30/21 7:45 AM
<input type="checkbox"/> 2.0 Deplaning Overall Plan.pdf			Chris Customer	3/30/21 7:45 AM
<input type="checkbox"/> ...				3/30/21 7:45

- File Info/History
- View a thumbnail of the file, as well as basic information like the sheet size and file type
- File Names
  - Appear the hyperlinks – click the name to view the file
- Status
  - New Uploads
  - Versioned uploads
  - No changes (blank)
- Reviewed





- Markup Icons indicate markups by reviewers
- Uploaded
  - Name of the user who uploaded the files
- Date (Timestamp)



## Deleting Uploaded Files

Uploaded files can be deleted during initial upload when the applicant has the task. Common reasons for needing to delete files include duplicate files, incorrectly named files, and uploading into incorrect folders. If you catch the mistake after a task has been returned to the City, please reach out to the project's Process Manager or email the ePlans Teams at [TClePlans@PortlandOregon.Gov](mailto:TClePlans@PortlandOregon.Gov). They will provide users a two-hour window to access their project's file's tab and delete incorrect files.

## Adding View Only Members

As the applicant, you are solely responsible for the complete of tasks. We understand that you may want more team members to have access to your project in ProjectDox to assist with the completion of tasks. With View Only access, members can see comments left by the reviewer in the Reviews tab. They can review markups and reviewer comments. View Only members can also access project reports, such as the Workflow Routing Slip, which shows information like all task's statuses and completion dates, and the All-Unresolved Items Report. This will display details about unresolved comments. Follow the steps below to add a team member to your project with View Only access.

- Open a task eForm.
- Click** the *Group Management* tab.
- Enter** your team member's name and email address.
- Click** *Invite User*.

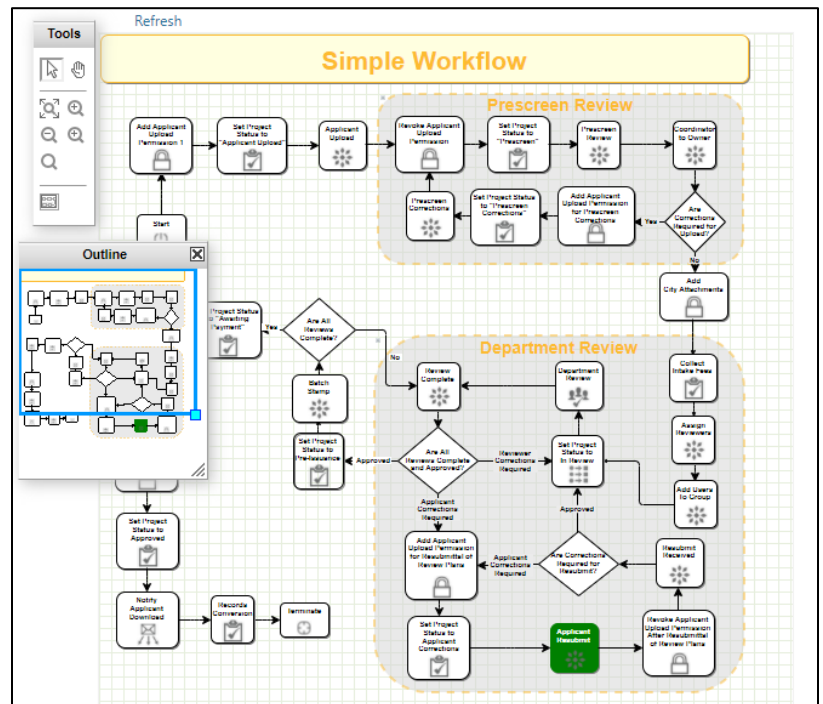
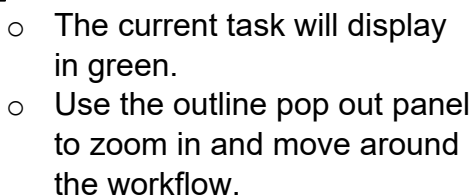
The screenshot shows a web browser window titled "Applicant Upload - Google Chrome" with the URL [eplanstest.portlandoregon.gov/ProjectDoxWebUI/WorkflowForms/Eform.aspx?wflowTaskID=7434&RemoteInvoke=false](http://eplanstest.portlandoregon.gov/ProjectDoxWebUI/WorkflowForms/Eform.aspx?wflowTaskID=7434&RemoteInvoke=false). The page header includes the "ProjectFlow BUILDING" logo and the "avolve software" logo. The main content area has three tabs: "Task Information", "Workflow Report", and "Group Management" (which is selected). Below the tabs is a section titled "Invite/Remove Project User" with a help icon. It contains two columns of form fields. The left column is for inviting a user, with a dropdown menu set to "Applicant Associates" and input fields for "First Name", "Last Name", and "Email". Below these is an "Invite User" button. The right column is for removing a user, with a dropdown menu set to "Applicant Associates" and a "Name" dropdown menu. Below these is a "Remove User" button. At the bottom of the page, there is a "Task Instructions" section with a "Learn how" link. Below the instructions is a checkbox labeled "Upload Complete - Notify City of Portland".



## Project Status Tab

## Access the Workflow Designer

1. **Click** the name of your project.
2. **Click** the *Tasks* tab.
3. **Click** the *Workflow Designer* icon.



**Congratulations!** You have successfully finished part one of submitting your plans electronically. A notification has been sent to the Process Manager to start the Prescreening process to determine if the submittal requirements have been met.






## Prescreening

Prescreening is cursory review of your uploaded documents in preparation for formal review. If there are questions or missing items from your submittal, you will receive a *Prescreen Rejection* email with instructions on the changes requested and how to resubmit. If you have met all submittal requirements, you'll be notified of Intake Fees due by your Process Manager. Once fees are paid, your application will move to be formally reviewed.

## Returned for Corrections

If your submittal requirements were not complete, you will receive an email notification that prescreening has needs corrections.

 CITY OF PORTLAND, OREGON  
ePLANS

**Prescreen Corrections Task Assignment**

**Attention Debbie:**

You have been assigned a task on Project: **20-XTESTX-JLS-00-CO**

The due date for this task is: **8/28/2020 3:00:57 PM**

Click the "Project Task Access" link below to access your tasklist and then click on the link for the task.

Project:	<b>20-XTESTX-JLS-00-CO</b>
Task:	<b>Prescreen Corrections Task</b>
<a href="#">Project Task Access</a>   <a href="#">Login to ProjectDox</a>	

If you do not have access to the specified folder, please contact the [Project Administrator](#).

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

*Example Email*

Follow these steps to complete the Prescreen Corrections Task:

1. **Click** the link in the email to access the Prescreen Corrections Task.
2. The Prescreen Corrections Task will appear on your Tasks tab after you click your project's name.





- a. Click on the *Prescreen Corrections Task* to launch the corrections eForm.

The screenshot displays the ProjectDox web application interface. At the top, there is a navigation bar with 'Home', a search icon, a 'Project' dropdown menu, 'All Tasks', a user icon, 'Logout', and a help icon. Below this is a secondary navigation bar with tabs for 'Tasks', 'Files', 'Status', 'Info', 'Reports', and 'Reviews'. The main content area is titled 'Applicant Training Videos: Applicant Training Videos for Jaimeleigh' and 'Main Contact: Chris Customer'. On the left, there is a sidebar with 'Refresh' and 'Save Settings' buttons, and a table with columns 'ACTION', 'TASK', and 'PROJECT'. The table contains one row: 'Accept', 'Prescreen Corrections Task', and 'Applicant Training Videos'. Below the table, it says '1 - 1 of 1 records'. The main content area is titled 'PRESCREEN CORRECTIONS' and includes a 'Task Information' tab. The 'Task Information' section shows details: Project Name: Applicant Training Videos, Project Description: Applicant Training Videos, Coordinator: (blank), Review Cycle: 1, Workflow: BLD - Simple Workflow, Current User Login: Chris Customer (chriscustomer20@gmail.com), and Task Due Date: 6/11/21 6:27 AM. Below this is a 'Task Instructions' section with a 'Learn how' link. The instructions state: 'After you have successfully uploaded all required plans and documents, please click the (Return to City of Portland) button.' There is a 'STEP 1 of 4: Respond to any comments, as needed' section. At the bottom, there is a 'Return to City of Portland' button.

3. Follow the task instructions. Review the Prescreening Comments to identify which requirements were noted as missing. [Skip ahead to learn more about reviewing comments on the Review Comments List.](#)

The screenshot shows the 'Task Instructions' section of the ProjectDox interface. It includes a 'Learn how' link. The instructions state: 'After you have successfully uploaded all required plans and documents, please click the (Return to City of Portland) button.' Below this is a 'STEP 1 of 4: Respond to any comments, as needed' section. This section is titled 'Resolve Review Comments' and shows 'Unresolved Comments: 2', 'Info Only Comments: 0', and 'Files with Markups: 0'. There are three buttons: 'Review Comments', 'Export to Excel', and 'Import Excel Responses'. Below the buttons, there is a 'Learn how' link. The 'Review Comments' button has a tooltip that says 'Review and respond online.' The 'Export to Excel' button has a tooltip that says 'Review and respond in Excel, then upload your responses.' Below this is a 'STEP 2 of 4: Upload any new or updated files into this project' section. This section is titled 'Version Upload for: Applicant Training Videos' and shows 'Select "Versioned Files" to upload files as new version updates for files previously submitted and received. Select "New Files" to upload any additional new file into this project as requested.' There are two buttons: 'Versioned Files' and 'New Files'. At the bottom, there is a 'Return to City of Portland' button.



- After you have identified the missing or corrected drawings and/or documents to upload, scroll to the bottom of the eForm and upload the corrected drawings/documents to the appropriate folder. [Skip ahead to learn about Resubmitting Files.](#)

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

Version Upload for: Applicant Training Videos ?

Select "Versioned Files" to upload files as new version updates for files previously submitted and received.  
Select "New Files" to upload any additional new file into this project as requested.

Versioned Files | New Files

Are your updated files named exactly the same\* as the prior versions?

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

Please click appropriately for the type of files you are uploading. [Learn More](#)

Uploaded files:  
Select folder to open file list.

**File Upload - Google Chrome**

eplanstest.portlandoregon.gov/ProjectDox/Html5Upload.aspx?ProjectID=4295&FolderID=...

**CITY OF PORTLAND, OREGON**  
**Test Site**

Folder: Applicant Training Videos\Drawings

or drag files into this area.

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

- Once your upload is complete for all files, check the confirmation checkbox.

Uploaded files:  
Select folder to open file list.

- Drawings (22 - 0 New)
- Documents (7 - 0 New)
- Reference Only
- City Attachments (1 - 0 New)

**STEP 3 of 4:** Check all to confirm you have completed this task and are now ready to submit

Confirmation ?

☒ \*I have uploaded the corrected documents and/or drawings as indicated above. \*Required

**STEP 4 of 4:** Click the "Return to City of Portland" button below to complete your task



6. **Click** *Return to the City of Portland*.
7. Upon completion, the City will be notified that the files have been completed or corrected and will continue with the Prescreening process.

## Prescreen Approved

If your submittal is approved, the Project Administrator will initiate the review process by assigning the review departments.



## Plan Resubmit

Once department review groups have reviewed your files, you will be most likely receiving corrections to make changes before final approval. Make corrections by (1) replying to review comments and (2) uploading corrected files.

## Review Comments List

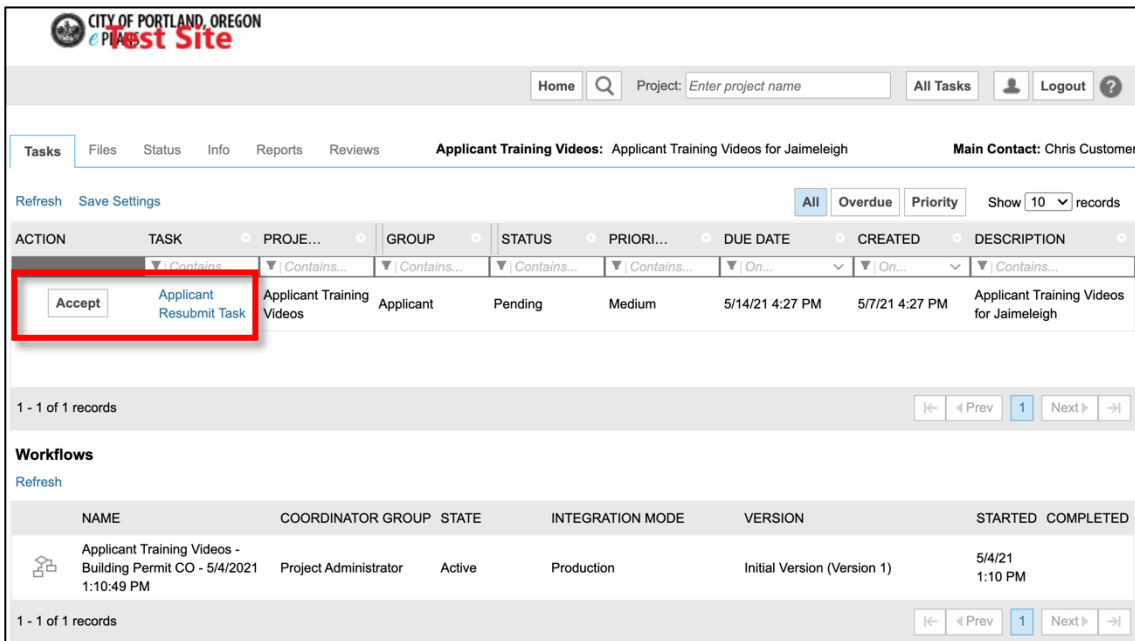
All review comments are managed by the Review Comments list. This is where reviewers and process managers will leave comments, markups, and inquiries for applicants and where applicants can respond. There are two ways to access the Review Comments list:

1. Through a task eForm (Prescreen Corrections Task or Applicant Resubmit Task)
2. The project's **Reviews** tab

### Review Comments List – Task eForm

If you receive a task requiring corrections, you will be directed to the Review Comments list to see comments, markups, and inquiries left by reviewers.

1. Click the task name. For this example, we will click the Applicant Resubmit Task.



The screenshot shows the City of Portland, Oregon ePlan Test Site interface. The top navigation bar includes links for Home, Search, Project (with a text input field), All Tasks, Logout, and a help icon. The main content area is titled "Applicant Training Videos: Applicant Training Videos for Jaimeleigh" and "Main Contact: Chris Customer". Below this, there are tabs for Tasks, Files, Status, Info, Reports, and Reviews. The "Tasks" tab is active, showing a list of tasks. The first task is "Applicant Training Videos" with a status of "Pending" and a priority of "Medium". The "Accept" button for this task is highlighted with a red box. Below the task list, there is a "Workflows" section with a table showing the workflow details for the "Applicant Training Videos" task.

ACTION	TASK	PROJE...	GROUP	STATUS	PRIORI...	DUE DATE	CREATED	DESCRIPTION
Accept	Applicant Resubmit Task	Applicant Training Videos	Applicant	Pending	Medium	5/14/21 4:27 PM	5/7/21 4:27 PM	Applicant Training Videos for Jaimeleigh

1 - 1 of 1 records

Workflows

NAME	COORDINATOR GROUP	STATE	INTEGRATION MODE	VERSION	STARTED	COMPLETED
Applicant Training Videos - Building Permit CO - 5/4/2021 1:10:49 PM	Project Administrator	Active	Production	Initial Version (Version 1)	5/4/21 1:10 PM	

1 - 1 of 1 records

2. Back on the eForm, scroll down to the step where you respond to comments. This is usually Step 1.
  - a. The type of comment and number of comments for each type are counted for you. This will change as the workflow progresses and more reviews are added.
3. Click Review Comments.



**Task Information**

**Project Name:** Applicant Training Videos  
**Project Description:** Applicant Training Videos for Jaimeleigh  
**Coordinator:** PD Reserved  
**Workflow:** BLD - Simple Workflow  
**Current User Login:** Chris Customer (chriscustomer20@gmail.com)  
**Task Due Date:** 5/14/21 11:00 AM

---

**Task Instructions** [Learn how](#)

After you have successfully uploaded all required plans and documents, please click the (Resubmit Complete) button.

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

**Resolve Review Comments** [?](#)

Unresolved Comments: 4  
 Submitter Questions: 1  
 Info Only Comments: 1  
 Files with Markups: 1

**Plan Review:** Review Comments
Export to Excel
Import Excel Responses
[Learn how](#)

Review and respond in Excel, then upload your responses.

Complete
Save For Later

4. The Review Comments list will launch in a new window.


Dept:	Show All	Status:	Show All	Response:	Show All	Search:	Enter keyword
Type:	Show All	Cycle:	Show All	Time:	Show All		
Refresh							
<input type="checkbox"/>	(0 selected)					Please enter your responses <a href="#">?</a>	
<input type="checkbox"/>	Ref.# 11	Applicant	Chris Customer	4/23/21 1:25 PM	Cycle 1	Type your response here.	
	Question	How did you like the PDOX Applicant Training Videos?					
	Inquiry						
<input type="checkbox"/>	Ref.# 10	Test	Life Safety	Robin Reviewer	4/23/21 1:12 PM	Cycle 1	Type your response here.
	Unresolved		1.7 Trusses.pdf				

In the Review Comments list, you will find four different types of comments: Markups, Library Comment, Comments, and Inquiry.

- **Markups** have comments or notations placed on a specific area of a drawing to denote a needed change.
- **Library Comments** and **Comments** are more general and apply to the plan set as a whole.
- **Inquiries** are questions and give reviewers the ability to start a dialog with applicants.

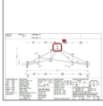




(0 selected)						Please enter your responses ?
<input type="checkbox"/>	Ref.# 11	Life Safety	Robin Reviewer	4/23/21 1:25 PM	Cycle 1	Type your response here.
	Question	How did you like the PDOX Applicant Training Videos?				
	Inquiry					
<input type="checkbox"/>	Ref.# 10	Test	Life Safety	Robin Reviewer	4/23/21 1:12 PM	Cycle 1
	Unresolved		1.7 Trusses.pdf			Type your response here.
	Markup		Test			
<input type="checkbox"/>	Ref.# 9	Planning and Zoning	Robin Reviewer	3/17/21 2:22 PM	Cycle 1	Type your response here.
	Unresolved	Please add details on breezeway on site plan.				
	Comment					
<input type="checkbox"/>	Ref.# 8	Eplans System Admin.	Robin Reviewer	3/17/21 5:59 PM	Cycle 3	No response required.
	Info Only	Please update as needed.				
	Library Comment					

Comments can be categorized into four statuses: Resolved, Unresolved, Info Only, and Question. The status of a comment might change as the workflow progresses.

- **Resolved** means changes meet the requirement or code.
- **Unresolved** means changes do not meet the requirement or code.
- **Info Only** is a comment used by the Reviewer to share information with the applicant. These comments do not need to be responded to or resolved.
- **Questions** are inquiries made by the reviewer or you, the applicant. Answer questions directly in the yellow column.

(0 selected)						Please enter your responses ?
<input type="checkbox"/>	Ref.# 11	Life Safety	Robin Reviewer	4/23/21 1:25 PM	Cycle 1	Type your response here.
	Question	How did you like the PDOX Applicant Training Videos?				
	Inquiry					
<input type="checkbox"/>	Ref.# 10	Test	Life Safety	Robin Reviewer	4/23/21 1:12 PM	Cycle 1
	Unresolved		1.7 Trusses.pdf			Type your response here.
	Markup		Test			
<input type="checkbox"/>	Ref.# 9	Planning and Zoning	Robin Reviewer	3/17/21 2:22 PM	Cycle 1	
	Resolved	Please add details on breezeway on site plan.				
	Comment	Responded by: Chris Customer - 3/17/21 2:39 PM Uploaded new site plan.				
<input type="checkbox"/>	Ref.# 8	Eplans System Admin.	Robin Reviewer	3/17/21 5:59 PM	Cycle 3	No response required.
	Info Only	Please update as needed.				
	Library Comment					





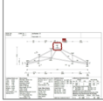
**Ensure a response is provided to every unresolved item.**

Since all markups, comments, and questions appear on the Review Comments list, we recommend sorting by newest first and working your way down the list. Please try to respond to all comments before resubmitting the task to the City.

### Responding to Markups

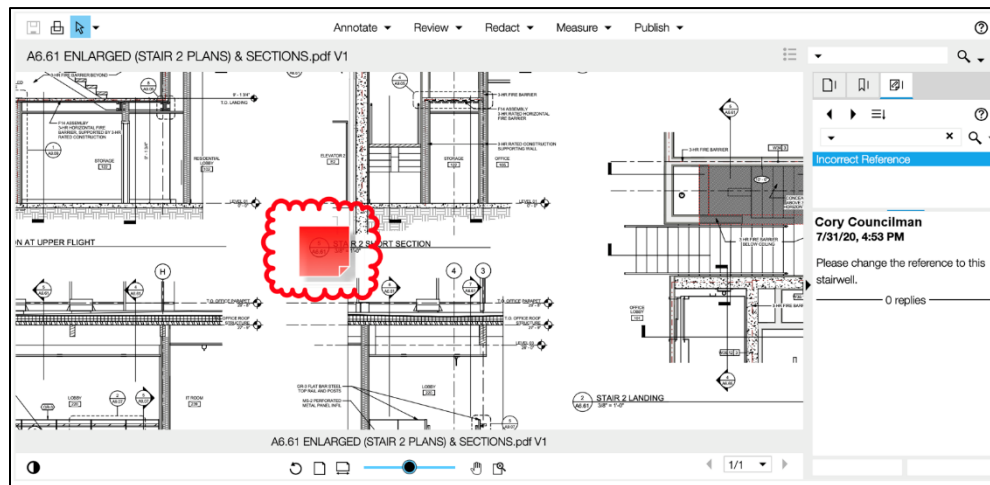
Markups have comments or notations placed on a specific area of a drawing to denote a needed change. These markups do not alter the plan sheet or drawing, they are just there to help guide you as you make your changes.

1. **Click** the thumbnail of the drawing image *or* the drawing name hyperlink. Clicking the drawing name hyperlink will launch the image in the Brava viewer for easier viewing.

<input type="checkbox"/>	(0 selected)					<b>Please enter your responses</b> ?
<input type="checkbox"/>	Ref.# 11	Life Safety	Robin Reviewer	4/23/21 1:25 PM	Cycle 1	Type your response here.
	Question	How did you like the PDOX Applicant Training Videos?				
	Inquiry					
<input type="checkbox"/>	Ref.# 10	Test	Life Safety Reviewer	4/23/21 1:12 PM	Cycle 1	Type your response here.
	Unresolved		<a href="#">1.7 Trusses.pdf</a>			
	Markup	Test				
<input type="checkbox"/>	Ref.# 9	Planning and Zoning	Robin Reviewer	3/17/21 2:22 PM	Cycle 1	
	Resolved	Please add details on breezeway on site plan.				
	Comment	Responded by: Chris Customer - 3/17/21 2:39 PM Uploaded new site plan.				
<input type="checkbox"/>	Ref.# 8	Eplans System Admin.	Robin Reviewer	3/17/21 5:59 PM	Cycle 3	No response required.
	Info Only	Please update as needed.				
	Library Comment					

2. Markups are placed on drawings as clouds or bubbles. Different colored clouds are used for different review groups. Hover over the cloud to read the markup or view it from the list in the panel on the right.





3. **Close** the viewer.
4. **Respond** to the markup on the Review Comments list in the **yellow column on the far right**.
  - a. **Responses are automatically saved and automatically captures the authors data** (date and time stamp, user's name, cycle number, etc.)

						Please enter your responses ?
<input type="checkbox"/>	Ref.# 11	Life Safety	Robin Reviewer	4/23/21 1:25 PM	Cycle 1	Type your response here.
	Question	How did you like the PDOX Applicant Training Videos?				
	Inquiry					
<input type="checkbox"/>	Ref.# 10	Test	Life Safety Robin Reviewer	4/23/21 1:12 PM	Cycle 1	Type your response here.
	Unresolved	1.7 Trusses.pdf				
	Markup	Test				
<input type="checkbox"/>	Ref.# 9	Planning and Zoning	Robin Reviewer	3/17/21 2:22 PM	Cycle 1	
	Resolved	Please add details on breezeway on site plan.				
	Comment	Responded by: Chris Customer - 3/17/21 2:39 PM Uploaded new site plan.				
<input type="checkbox"/>	Ref.# 8	Eplans System Admin.	Robin Reviewer	3/17/21 5:59 PM	Cycle 3	No response required.
	Info Only	Please update as needed.				
	Library Comment					

5. **Make changes** on the original drawing and **use the exact same file name** so that the files version correctly. Please watch our training video on [File Naming Standards and Applicant Upload](#) to learn more. You can also read more in this [Quick Step Guide: File Naming Standards](#).
6. **Upload** the corrected files from the task eForm.

### Responding to Comments and Inquiries

Library comments, comments, and inquiries can be responded to directly on the Review Comments list.

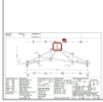
1. **Sort** comments by *Newest First*.





Dept: Show All Status: Show All Response: Show All Search:  Enter keyword [Close Window](#)  
 Type: Show All Cycle: Show All Time: Show All  
 Show All  
 Newest to Oldest  
 Oldest to Newest  
 Add Comment / Ask Question

Refresh (0 selected) [Learn how](#) **Please enter your responses** ?

<input type="checkbox"/>	Ref.# 11	Life Safety	Robin Reviewer	4/23/21 1:25 PM	Cycle 1	Type your response here.
	Question	How did you like the PDOX Applicant Training Videos?				
	Inquiry					
<input type="checkbox"/>	Ref.# 10	Test	Life Safety Robin Reviewer	4/23/21 1:12 PM	Cycle 1	Type your response here.
	Unresolved		1.7 Trusses.pdf			
	Markup	Updated stamp w/ valid renewal date for roof & floor trusses.				
<input type="checkbox"/>	Ref.# 9	Planning and Zoning	Robin Reviewer	3/17/21 2:22 PM	Cycle 1	Type your response here.
	Unresolved	Please add details on breezeway on site plan.				
	Comment					

2. **Read** the comment left by the reviewer.
3. **Respond** directly in the **yellow column on the far right**.
  - a. **Responses** are automatically saved and automatically captures the authors data (date and time stamp, user's name, cycle number, etc.)
4. **Close** the Review Comments list and return to the eForm to complete the task.

Dept: Show All Status: Show All Response: Show All Search:  Enter keyword [Close Window](#)  
 Type: Show All Cycle: Show All Time: Show All  
 Refresh [Learn how](#) **Please enter your responses** ?

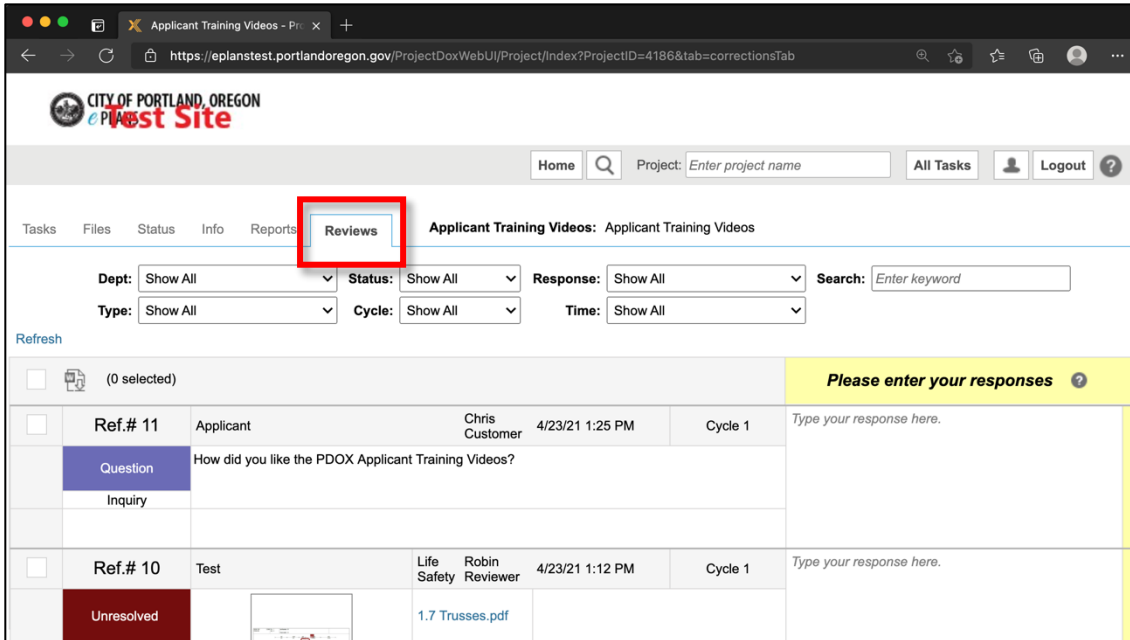
Add Comment / Ask Question

<input type="checkbox"/>	Ref.# 4	Applicant	Chris Customer	5/10/21 4:03 PM	Cycle 1	Type your response here.
	Question	Can I ask a question at any time during the review cycle?				
	Inquiry					
<input type="checkbox"/>	Ref.# 1	Life Safety	Robin Reviewer	3/31/21 9:03 AM	Cycle 1	No response required.
	Info Only	Based on the plans submitted, additional markups and checklist items will need to be added after drawings are corrected. Many items do not have enough information to review thoroughly.				
	Library Comment					
<input type="checkbox"/>	Ref.# 2	Life Safety	Robin Reviewer	3/31/21 9:03 AM	Cycle 1	Uploaded multiple drawings with 50 STC protection.
	Unresolved	1207.1 - In general acoustic walls were not provided between dwelling units at shafts. Please update drawings to provide min 50 STC protection between dwelling units.				
	Library Comment	Responded by: Chris Customer - 4/2/21 8:33 AM Uploaded multiple drawings with 50 STC protection.				
<input type="checkbox"/>	Ref.# 3	Project Administrator	Terry Technician	5/2/21 5:15 PM		No response required.
	Comment	Thanks for the updates.				

## Review Comments List – Reviews Tab

Another way to access the Review Comments list is through the Reviews tab.

1. **Click** the name of your Project.
2. **Click** the *Reviews tab*.



Follow all of the steps above to respond to markups, comments, and inquiries.

**Note:** Corrections tasks **cannot** be resubmitted through the Review Comments list. After responses are complete, return back to the task eForm to submit the task back to the City.

## Resubmitting Files

Before resubmitting files, please follow the [File Naming Standards](#) to ensure version control.

ProjectDox has built in version control to ensure files are updated correctly. Please follow the task instructions to make sure all files are uploaded correctly and can proceed through the review cycle.

1. **Click** the *Applicant Resubmit Task* name to launch the task eForm.
2. For step two, choose the tab for the type of file you are uploading: Versioned Files or New Files.

**Ensure a response is provided to every unresolved item.**

## STEP 2 of 4:

Upload any new or updated files into this project

Version Upload for: Applicant Training Videos ?

Select "Versioned Files" to upload files as new version updates for files previously submitted and received.  
Select "New Files" to upload any additional new file into this project as requested.

Versioned Files

New Files

Are your updated files named exactly the same as the prior versions?

Yes

No

[Learn how](#)

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

Please click appropriately for the type of files you are uploading. [Learn how](#)

Upload Drawings

Upload Documents

Upload Reference Only

Uploaded files:

Select folder to open file list.

Complete

Save For Later

## Versioned Files

1. For versioned files, you are asked if your updated files are named exactly the same as prior versions. Choose **Yes** to upload files using the same directions as before.

## STEP 2 of 4: Upload

Version Upload for: 21-

Select "Versioned Files" to upload new versions of files already in the system.  
Select "New Files" to upload new files not previously in the system.

Versioned Files

New Files

Are your updated files the **same** as the prior version?  
*\* "name-v2.pdf" is not the same as "name.pdf"*


Uploaded files:

Select folder to open file

- Drawings (18 -)
- Documents (6 -)
- Reference Only
- City Attachments

File Upload

planestest.portlandoregon.gov/ProjectDox/Html5Upload.aspx?ProjectID=4295&FolderID=28141



CITY OF PORTLAND, OREGON

PLANS

Test Site


Close Window

Folder: Applicant Training Videos\Drawings

Browse For Files

or drag files into this area.

Start Upload

 2.3 Deplaning Sector 47 Plan.pdf

0B/596.66KB

0 of 1 uploaded [Hide Details](#)

0B/596.66KB

Orange files are new uploads

Blue files are new version uploads

Red files appear to be same as previously uploaded (will likely be discarded)

Complete

Save For Later

2. Choose **No** if you need assistance with uploading your files. **Click *Learn How*** for detailed instructions on versioning your files correctly in ProjectDox.



If changing a file name, please **first contact Permitting Services**.  
Then, be sure to **add a note in the comment section** of the eForm  
that a file name has been changed.

Version Upload for: ACME 3. ?

Select "Versioned Files" to upload files as new version updates for files previously submitted and received.  
Select "New Files" to upload any additional new file into this project as requested.

Versioned Files

New Files

Are your updated files named exactly  
the **same\*** as the prior versions?

Yes

No

[Learn how](#)

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

Uploaded files:

Select folder to open file list.

- ▶ Drawings (10 - 0 New)
- ▶ Documents (2 - 0 New)
- ▶ Reference Only

Response Complete - Resubmit

File Upload

https://eplanstest.portlandoregon.gov/ProjectDox/Html5Upload.aspx?ProjectID=4186&FolderID=2728...

CITY OF PORTLAND, OREGON  
ePLAN  
**Test Site**

Close Window

**Upload File Versions**

Project: ACME 3.

Select: Files w/Markups File(s) with markup comments that may require new versions

Start Upload

Drawings\1.7 Trusses.pdf

Select File

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





## New Files

1. Click *New File* tab to upload new files.

Version Upload for: ACME 3. ?

Select "Versioned Files" to upload files as new version updates for files previously submitted and received.  
Select "New Files" to upload any additional new file into this project as requested.

Versioned Files **New Files**

Please click appropriately for the **type of files** you are uploading. [Learn how](#)

Uploaded files:

Select folder to open file list.

2. Follow the file upload instructions as written previously.

## Submitting the Resubmit eForm

After you have responded to all comments in the Review Comments List and all new and versioned files are uploaded, you are ready to complete the Applicant Resubmit Task. This is the last task in a review cycle.

Applicants with more than 30 drawings need to complete the [Applicant Resubmit Checklist form](#) for every resubmittal. The Applicant Resubmit Checklist can be found on our Applicant website. An incomplete form could delay review of your submittal. You must answer 'Yes' or 'No' to each Yes/No question and upload to the **Documents** folder in ProjectDox.

Applicant Resubmit Checklist

1 / 3 100%

Bureau of Development Services

**Applicant Resubmit Checklist**

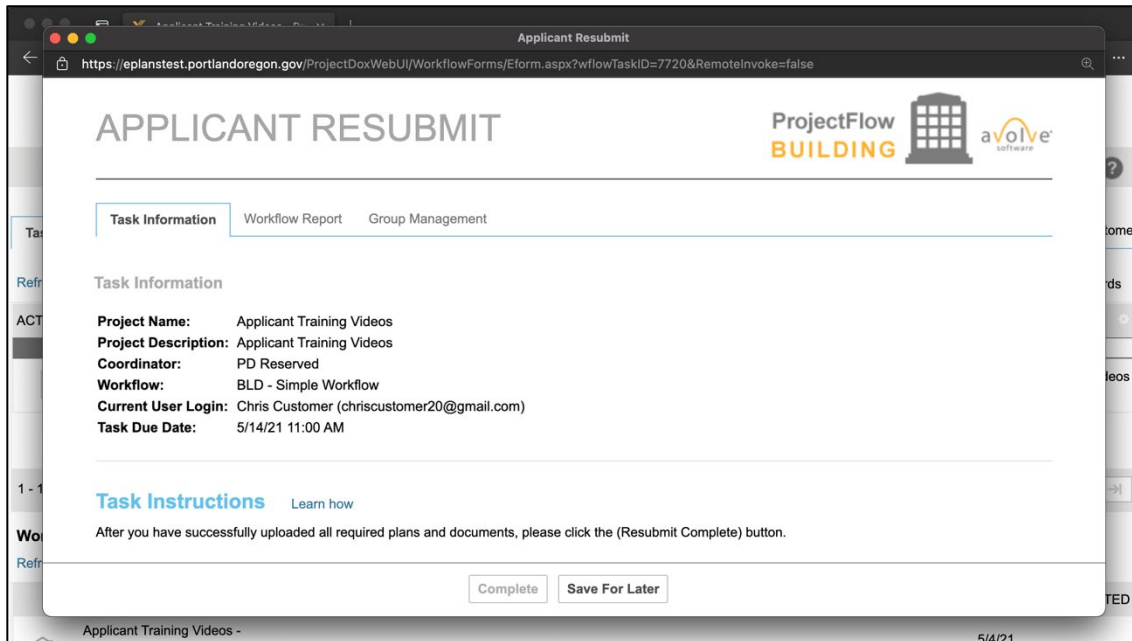
Complete this form with every resubmittal and upload it to the **Documents** folder in ProjectDox. An incomplete form could delay review of your submittal. You must answer Yes or No to each Yes/No question. When answering Yes, additional details will be requested and must be answered in full.

Date (YY/MM/DD) & time (H:MM) of document creation:


1. Have there been any changes to the Site Plan? ☐ Yes ☐ No

2. Have any structures been added or removed? ☐ Yes ☐ No

# 1. Open the Applicant Resubmit Task.



**APPLICANT RESUBMIT**

ProjectFlow BUILDING 

**Task Information** | Workflow Report | Group Management

**Task Information**

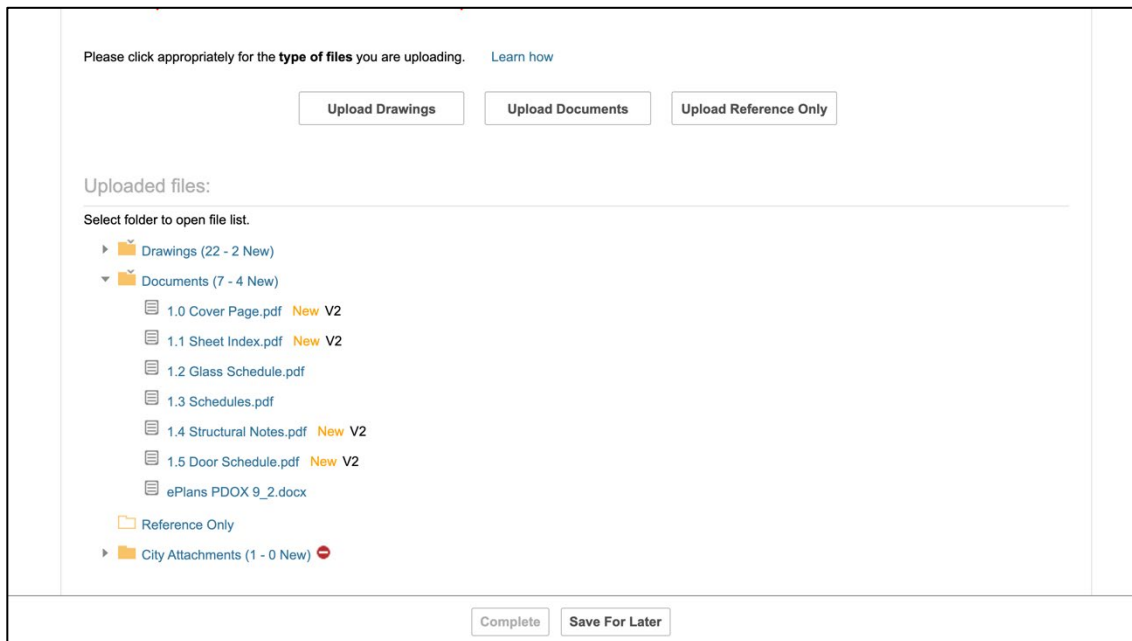
**Project Name:** Applicant Training Videos  
**Project Description:** Applicant Training Videos  
**Coordinator:** PD Reserved  
**Workflow:** BLD - Simple Workflow  
**Current User Login:** Chris Customer (chriscustomer20@gmail.com)  
**Task Due Date:** 5/14/21 11:00 AM

**Task Instructions** [Learn how](#)

After you have successfully uploaded all required plans and documents, please click the (Resubmit Complete) button.

[Complete](#) [Save For Later](#)

# 2. Open the folders to confirm new files and versioned files have been uploaded



Please click appropriately for the **type of files** you are uploading. [Learn how](#)

[Upload Drawings](#) [Upload Documents](#) [Upload Reference Only](#)

**Uploaded files:**

Select folder to open file list.

- Drawings (22 - 2 New)
- Documents (7 - 4 New)
  - 1.0 Cover Page.pdf **New V2**
  - 1.1 Sheet Index.pdf **New V2**
  - 1.2 Glass Schedule.pdf
  - 1.3 Schedules.pdf
  - 1.4 Structural Notes.pdf **New V2**
  - 1.5 Door Schedule.pdf **New V2**
  - ePlans PDOX 9\_2.docx
- Reference Only
- City Attachments (1 - 0 New)

[Complete](#) [Save For Later](#)

# 3. Check the boxes to confirm you have completed the task and are ready to submit.



#### 4. Click *Complete*.

Select folder to open file list.

- ▶ Drawings (22 - 2 New)
- ▶ Documents (7 - 4 New)
- ▶ Reference Only
- ▶ City Attachments (1 - 0 New)

**STEP 3 of 4:** Check all to confirm you have completed this task and are now ready to submit

---

Confirmation

- ☒ I have reviewed and addressed, including responses where appropriate, all Comments accessed by clicking on the "Review Comments" button above. **\*Required**
- ☒ I have reviewed and addressed, including responses where appropriate, all Changemark Items accessed by clicking on the "Changemark Items" button above. **\*Required**
- ☒ I have uploaded the revised drawings and/or documents required as a result of the review into the appropriate folder in the project using the SAME file names as the original files. I am ready to complete my assigned task and resubmit back to the jurisdiction for further review. **\*Required**

**STEP 4 of 4:** Click the "Complete" button below to complete your task

---

---

Complete

Save For Later

Below are more details about each step of the Plan Resubmit process.





## Approval

When the plan review is approved by all reviewers, you will be notified via email that the plan set is approved and completed.

## Print Approved Plans

Once the project is approved and permits are issued, **print** the approved final drawings and documents to keep on site. **Click** the *Files* tab and then the **Approved** folder. **Click** the checkbox to the left of the file name and then click the download button to save the approved plans to your computer.

The screenshot shows the 'ePlans Test Site' interface for the City of Portland, Oregon. The 'Files' tab is selected, displaying a list of files. A red box highlights the checkbox next to the file '01 SITE PLAN.pdf'. Another red box highlights the download icon in the toolbar above the file list.

FILE NAME	STATUS	REVIEWED	UPLOADED	DATE
01 SITE PLAN.pdf	New		Melissa Linehan	4/9/21 2:10 PM



## Helpful Reports

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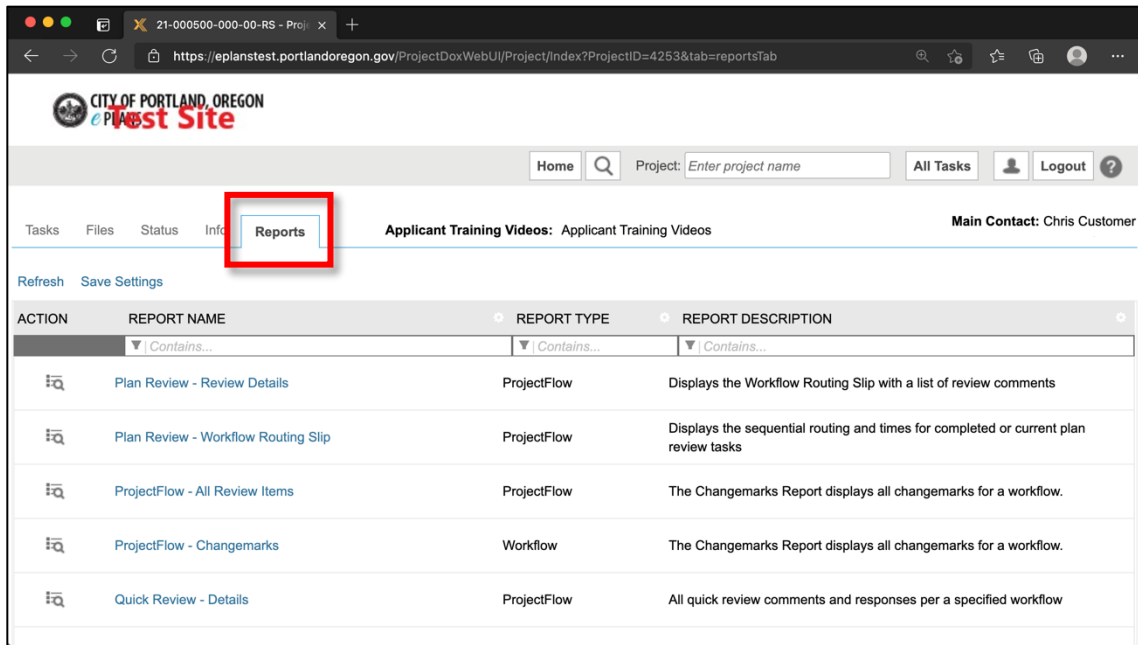
There are several reports that can be used to provide details and status of your project. They can be accessed and printed during any time of the review cycle. Here is a list of reports that may be helpful:


1. Plan Review – Workflow Routing Slip
  - a. Displays the sequential route of all tasks for the workflow.
2. Plan Review – All Unresolved Comments
  - a. Lists the review comments, Checklist and Changemark details for a workflow instance review cycle.
3. Plan Review – Changemarks Report
  - a. Displays all Changemark corrections comments from each review group.
4. Plan Review – Department Review Status Report.
  - a. Displays the status of all reviews for a workflow.
5. Current Project – All Uploaded Files with Sheet Sizes
  - a. All uploaded files with sheet sizes within this project. Make sure sheet sizes are the same size to assist with the batch stamp process.

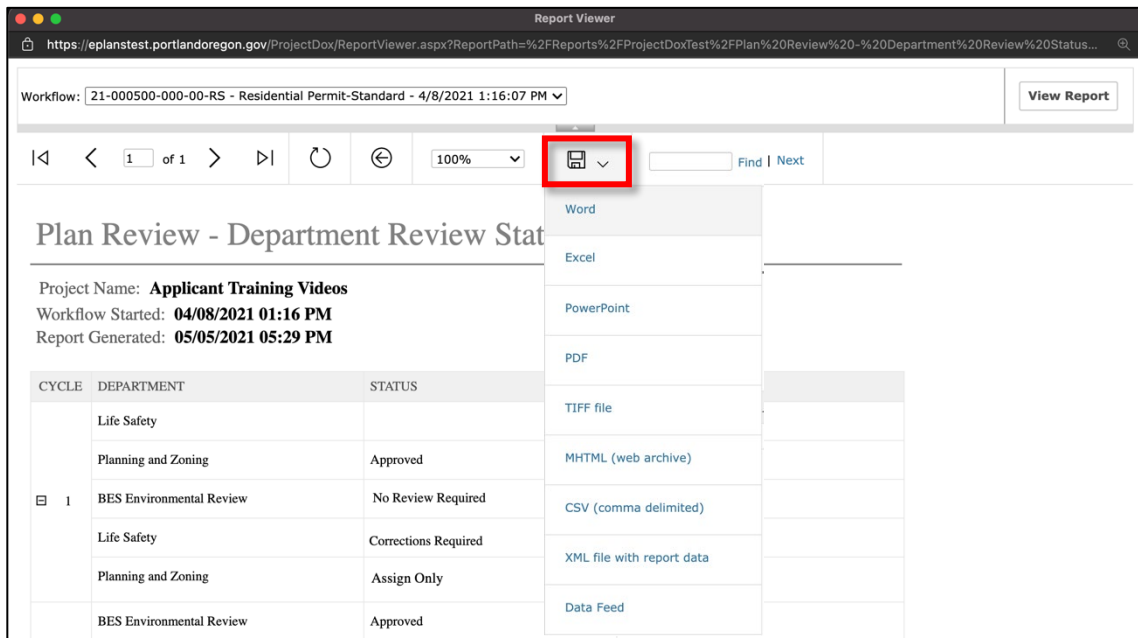
To identify the status of a project through the Plan Review Process, please follow these instructions:

1. **Click** the project where you want to view projects.
2. **Click** the *Reports* tab.





3. Click the  report icon next to the report you want to view.
4. The report will pop up in a new window.
5. To download to excel, click the file icon.



6. Reports can be exported into multiple formats. The ePlans Team recommends downloading to Excel for easy sorting and filtering of data.