



PDX ePLANS

## Getting Started with PDX ePlans

1. Work with your process manager to complete your permit application.
2. Prepare files for submittal. Plans must comply with specific size and naming conventions to be accepted.
  - a. Plans are not to exceed 36 X 48 E/O
  - b. Each file must be one page only. Multiple drawing pages will not be accepted.
  - c. File name guidelines must be followed. See detailed guidelines noted below in this document.
  - d. Affix third-party verified digital signature or seal to the project submission for the plans that are required to be signed and sealed.
  - e. Please do not password protect, encrypt or 'secure' your files, as this will prohibit the ability to upload the documents into our archival system.
  - f. 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).
  - g. Dimensions: 3" width x 3" height, offset 2" from the right, 1" from the top right.
3. Invitation to Upload plans and documents the applicant will receive an email from [ProjectDox@portlandoregon.gov](mailto:ProjectDox@portlandoregon.gov)
4. Upload Plans/Documents.
  - a. Select the appropriate destination folder when uploading plans and documents. Example, plan files must be uploaded to the Plans Folder and document files to the Documents Folder.
  - b. Please refer to the [File Naming Standards Guide](#) or view the [File Naming Standards and Applicant Upload](#) video for additional information.

File names should reflect the file's content.  
Limit the file name to 50 characters or fewer.  
Use abbreviations when necessary.

Follow these rules when using special characters.

Do use "." (period), "&" (ampersand), and "-" (dashes).

Do NOT include any special characters including "\_" (underscores), %, #, ",", etc.

**Example: 001 A2.02 THIRD FLOOR PLAN**



5. Complete Upload Task.

- a. Once all drawings and documents are uploaded, you are ready to formally submit to the City.
  - i. Click the Tasks tab.
  - ii. Click the Applicant Upload Task associated with your Project.
  - iii. Check off the box confirming you have completed this task and are ready to submit.
  - iv. Click **Upload Complete – Notify the City of Portland** to notify the City of your completion.

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

6. View Project Status and Comments.

- a. View project status and review comments at any time by opening your project and clicking the **Status** tab and **Reviews** tab.

CITY OF PORTLAND, OREGON  
ePLANS

Home  All Tasks Logout ?

Tasks **Status** Info Reports **Reviews** Applicant Training Videos: Applicant Training Videos Main Contact: Chris Customer

Refresh Save Settings All Overdue Priority Show 10 records

ACTION	TASK	PROJE...	GROUP	STATUS	PRIORI...	DUE DATE	CREATED	DESCRIPTION
Accept	Applicant Upload 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 |< < Prev 1 Next > =>

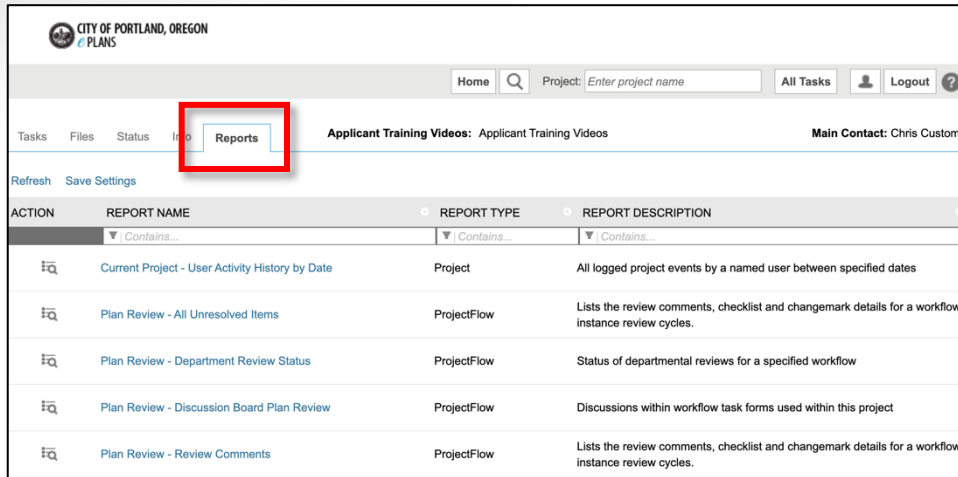
**Workflows**  
Refresh

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 |< < Prev 1 Next > =>

7. Download reports.

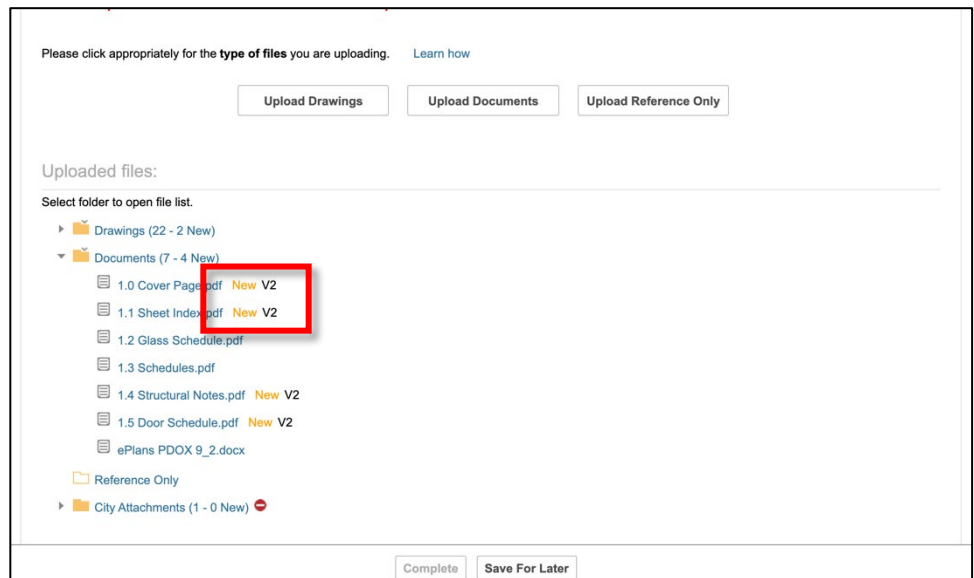
- a. Reports provide information about different aspect of your project. The **Workflow Routing Slip** shows project status; the **Department Review Status** report shows department reviews for a specified workflow.



8. Prepare and Upload Corrected Files through the Applicant Resubmit Task.

- a. Click the Tasks tab; click the Applicant resubmit Task associated with your Project.
- b. Proceed with uploading the corrected files. Please be sure to submit responses to all comments.

- c. Revised files need to have the exact same file name as the original upload. Do not change the name of revised files before upload; files will automatically version in ProjectDox. Successful versioning is confirmed with a "V" followed by a version number next to the newly uploaded file name.



- d. Please watch [Module 5: Resubmit to learn more about this task.](#)

9. Complete the Applicant Resubmit Task.

- a. Once all corrected files are reuploaded, you are ready to formally submit to the City.
- b. Scroll down on the Applicant Resubmit Task eForm.
- c. Check off the boxes confirming you have completed this task and are ready to submit.
- d. Click **Complete** to notify the City of your completion.

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

Once the Applicant Resubmit Task is complete, City staff start the corrections plan review task for all reviewers. The review cycle continues until all the requirements are satisfied. You will receive an email from [ProjectDox@portlandoregon.gov](mailto:ProjectDox@portlandoregon.gov) when the project is approved, and issuance fees need to be paid.

