



Applicant Overview

The City of Portland Bureau of Development Services is committed to providing applicants a way to upload and access plans electronically and keep processes moving during the [Coronavirus \(COVID-19\)](#) crisis.

We appreciate your patience as we refine our processes.




TERMINOLOGY (CROSS WALK)





Before continuing to the process overview below, review the terms below.

TERM	DEFINITION
ProjectDox	A web-based solution that allows building plans to be submitted electronically, improve review cycle, reduce costs associated with obtaining permits as well as support green initiatives.
Corrections	Within the ProjectDox system, corrections are called Changemarks & Checklist items and are equivalent to written Checksheets. ChangeMarks and Checklist Items help reviewers and applicants have a back-and-forth dialogue about corrections and plan adjustments. During plan review, reviewers add Checklist items and ChangeMarks to communicate issues and required updates to applicants. Applicants then update plans as necessary and respond to reviewer comments. This process repeats until all Checklist items and ChangeMarks have been resolved. Multiple review cycles may be necessary before plan review is complete.

INTAKE PROCESS OVERVIEW






The steps below outline the intake process.

STEP	DETAILS	HELP
1. 	Start the Permit Application. Email BDSSignPermits@portlandoregon.gov to verify if the project qualifies and to start the permit application.	
2. 	Prepare files for submittal. Plans must comply with specific size and naming conventions: <ul style="list-style-type: none"> 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. See detailed guidelines on page 3. 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, encryptor '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 2" from the right, 1" from the top right. 	
3. 	Review email from ProjectDox@portlandoregon.gov. Email includes ProjectDox link to instructions to upload plans and documents	

4.		<p>Uploads and submit plans, documents and application to ProjectDox</p> <ol style="list-style-type: none"> Log into ProjectDox Select Projects Tasks Tab Select Applicant Upload Task Select Submission Complete tab 	
5.		<p>View Project Status and Comments</p> <ol style="list-style-type: none"> Log into ProjectDox to review the comments and project status at any time Select Project Reports tab Select Changemark Report along with Department Review Status Report to view comments and review disposition Select Workflow routing slip report to view progress 	

SUBMITTING CORRECTIONS

The following steps may not be applicable if no corrections are required.

6.		<p>Prepare and upload corrected files.</p> <ul style="list-style-type: none"> Revised files (drawings and documents) must be properly named. DO NOT change any file names when resubmitting plans. The corrected files MUST have the same file name as their original sheets. This is required for the versioning of the files. When corrected files are ready to be uploaded, the Applicant logs into ProjectDox and selects the permit number. Proceed with uploading the corrected files. Please be sure to submit response to all comments, and date the responses. Revised files that are uploaded correctly will automatically show "V2" after the file name. 	
7.		<p>Complete Resubmit Task.</p> <ol style="list-style-type: none"> Log into ProjectDox to review the comments and project status at any time Select Project Reports tab Select Changemark Report along with Department Review Status Report to view comments and review disposition. Select Workflow routing slip report to view progress. Make sure to click the 'Upload Complete- to Notify the Jurisdiction' button; this will send notification via email to the City the upload and task is complete. 	
8.		<p>The review cycle continues until all the requirements are satisfied. You will receive an email from ProjectDox@portlandoregon.gov when the project is approved, and issuance fees need to be paid.</p>	



FILE NAMING STANDARD

Below is the required format for acceptable file names.

- ✓ 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), “%”, “#”, “,” (commas), etc. ProjectDox will not upload files with these special characters.

Required File Name	Description/Example
1 3 leading numbers	All files should be named according to the order listed on your provided title sheet, cover sheet or table of contents. This format ensures files display in a logical order. If you don’t have an index or cover, name plans files in the order you want them displayed. Example: 001, 002, 003...010...100...
2 Standardized File Name	Use the following file names as a guide when uploading plans and documents: <ul style="list-style-type: none"> • Site plan • Floor plan • Elevation • Sign Detail • Sign Inventory • Structural Calculations • Permit Application • City information and Directives • Reference
3 Description	A short description of the type of document or project Document examples: Coversheet, Preliminary Site Plans, Second Level Floor Plan Details

Example:

001 A Third Floor Plan

Please read our [File Naming Standards](#) Quick Steps to learn more.

RESUBMISSIONS

Corrected files need to be re-submitted with the SAME EXACT FILE NAME as the original. Do NOT “version”, rename files, or add an extra (blank) space when uploading resubmitted files. ProjectDox will automatically version the file when the upload is complete.

INSERTING NEW DOCUMENTS IMAGES BETWEEN EXISTING PAGES

To upload a document or drawing between two files, start your file name with the preceding file prefix and include “.#”. Example: if you want to insert a file between **001 A Third Floor Plan** and **002 C Grading Plan**, start the file with **001.1** at the beginning. This ensures your new file will display between the two files.