

# ProjectDox – Membership(s)/Tasks – FAQs

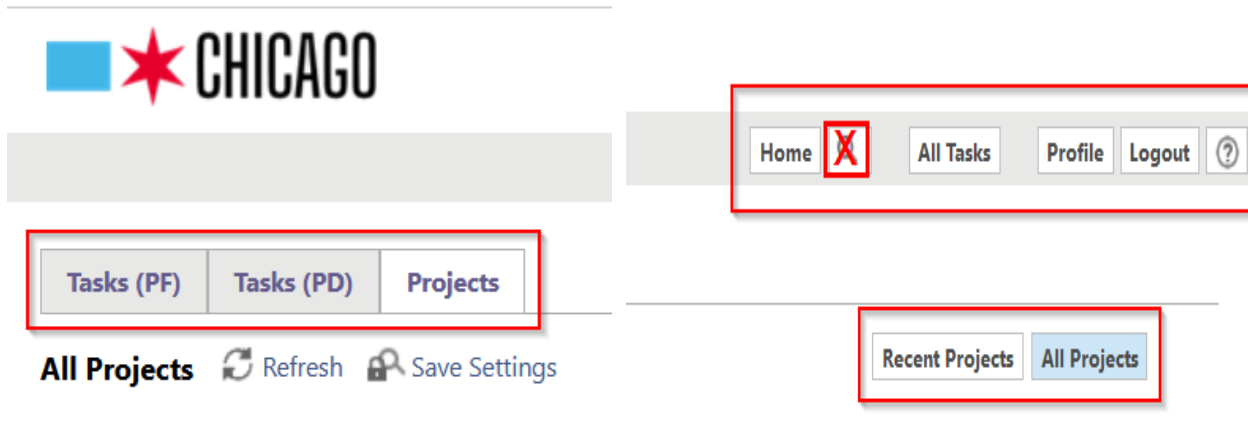
This document will discuss some of the frequently asked questions associated with ProjectDox memberships, and how to best navigate through project listings and task listings to know what is available to an individual user, as well how to search through the filter(s) to find a specific project not listed in the HOME page.

## Frequently Asked Questions:

- [What is my HOME page showing me?](#)
- [What projects do I have membership in?](#)
- [Why do I only have a Maximum of 50 projects listed on the HOME page?](#)
- [How do I search for projects that are not listed in the Maximum 50 projects listed on the HOME page?](#)
- [What projects do I have active Tasks in?](#)

Continue through the document for individual explanations of the above FAQs.



- **What is my HOME page showing me?**



In the top LEFT corner:

- **Tasks (PF)** – This tab lists active pending/accepted tasks. (Post - November 15,2018)
- **Tasks (PD)** – This tab lists active pending/accepted tasks. (Pre - November 15,2018)
- **Projects** – This tab lists a maximum of 50 projects in which membership exists.

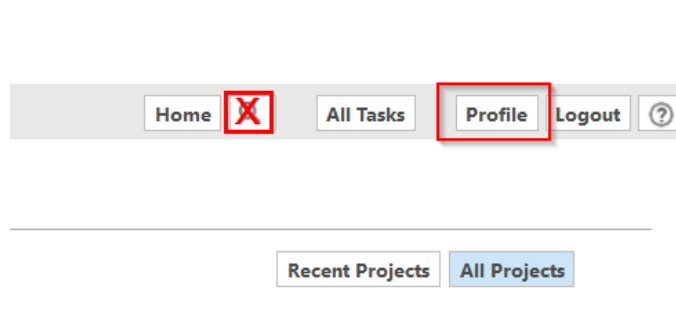
In the top RIGHT corner:

- **HOME** – Will direct you to the page that displays the tabs pictured in the left screenshot.
-  – This button should not be used as it is not helpful for project searches.
- **All Tasks** – Displays all active pending/accepted tasks. (PF and PD)
- **Profile** – Displays profile information including self-password management, Contact Information, Project Membership, and Group Membership.
- **Logout** – Logs out of an active session
-  – Help button that directs you to an Avolve Software ProjectDox user guide.
- **Recent Projects** – Displays a chronological listing of last projects entered. (Projects Tab Only)
- **All Projects** – Displays a list of a Maximum of 50 projects created (Projects Tab Only)

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- **What projects do I have membership in?**

The ProjectDox HOME page will only display a MAXIMUM of 50 projects in which you have membership in. If you are not able to view projects in the HOME page list, you can view a list of ALL project memberships associated with your account by clicking on your “Profile” near the top right of any current page that you are viewing.



Following this action, you will then click on “Project Membership” from the default view showing your Contact Information.



### Profile Information

#### Change Password:

|                       |                      |
|-----------------------|----------------------|
| Current password:     | <input type="text"/> |
| New password:         | <input type="text"/> |
| Confirm new password: | <input type="text"/> |

#### Password Reset Question & Answer:

|                    |  |
|--------------------|--|
| Security question: | <input type="text" value="Where were you born?"/>              |
| Security answer:   | <input type="text" value="&lt;Answer has been encrypted&gt;"/> |

|                            |                      |                           |                         |
|----------------------------|----------------------|---------------------------|-------------------------|
| <b>Contact Information</b> | <b>User Metadata</b> | <b>Project Membership</b> | <b>Group Membership</b> |
|----------------------------|----------------------|---------------------------|-------------------------|

\* Required field

|               |  |              |  |
|---------------|--|--------------|--|
| First Name: * | <input type="text" value="Tim"/>                 | Last Name: * | <input type="text" value="Applicant"/> |
| Email: *      | <input type="text" value="tim@company.com"/>     |              |  |
| Title:        | <input type="text" value="Test"/>                |              |  |
| Company:      | <input type="text" value="Catalyst Consulting"/> |              |  |

When your project membership list displays, you will have the ability with the arrowed keys to toggle the pages through the ENTIRE list of your project memberships.

The Application Number(s) (APNO) listed in your profile can be copied and pasted (or noted and typed) into the Project search filter on the HOME page to view the project. (Explained in greater detail in FAQ **“How do I search for projects that are not listed in the Maximum 50 projects listed on the HOME page?”**)



### Profile Information

#### Change Password:

|                       |                          |
|-----------------------|--------------------------|
| Current password:     | <input type="password"/> |
| New password:         | <input type="password"/> |
| Confirm new password: | <input type="password"/> |

#### Password Reset Question & Answer:

|                    |                             |
|--------------------|-----------------------------|
| Security question: | Where were you born?        |
| Security answer:   | <Answer has been encrypted> |

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

|                     |               |                           |                  |
|---------------------|---------------|---------------------------|------------------|
| Contact Information | User Metadata | <b>Project Membership</b> | Group Membership |
|---------------------|---------------|---------------------------|------------------|

**Project Membership:**

| Project Name                                 | Description                           |
|--|---------------------------------------|
| 100630826 2933 N HARLEM AVE                  | TEST - 9.1.9.9 NEW Zoning RC          |
| 100630826 2933 N HARLEM AVE - DO NOT USE     | TEST TEST TEST TEST                   |
| 100630827 2933 N HARLEM AVE-LEAVE FOR AVOLVE | USE FOR 9.1 TESTING                   |
| 100638553 2336 S PRINCETON AVE               | RM-5 - ERECT NEW 7 STORY RESIDENTI    |
| 100643578 3134 W 42ND ST                     | RS-3 - THIS IS A RETROACTIVE PERMIT I |
| 100723189 939 E 132ND ST                     | RS-3 - ALTERATIONS AND RENOVATION     |
| 100729541 333 S STATE ST                     | TEST - 9.1.9.9 NEW Zoning RC          |
| 100759868 3643 W 55TH ST                     | B3-1 - INTERIOR BUILD-OUT OF COMM     |
| 100769287 1123 W RANDOLPH ST                 | C1-3 - 6 STORY BUILDING WITH 1ST AN   |
| 100779316 440 N WELLS ST                     | DX-5 - ADDITION OF (3) NEW ANTENN     |
| 100782453 1958 W NORTH AVE                   | C1-3 - SWAPPING (9) EXISTING ANTENI   |
| 100784876 30 E ADAMS ST                      | DX-16 - SWAPPING (7) EXISTING ANTE    |

**Page Toggles**

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- **Why do I only have a Maximum of 50 projects listed on the HOME page?**

While on the HOME page click on the “Projects” tab and you will see a message below the list of projects: **“Max display (50) records – search or filter for additional projects”**

Having a Max display record for projects regarding individual accounts helps the system to perform at an optimum level.

If you do not see a specific project that you desire to view in the Max 50 display, you must search for the project in question using the search filter provided directly above the list displaying the Application Numbers and their respective addressed worksite locations.

The screenshot shows the CHICAGO HOME page interface. At the top left is the CHICAGO logo. Below it are navigation tabs: Tasks (PF), Tasks (PD), and Projects. The Projects tab is selected. Below the tabs are options for All Projects, Refresh, and Save Settings. A Column Filter dropdown is visible. Below this is a table with columns for PROJECT, OPTIONS, and DESCRIPTION. The first row of the table has a search filter dropdown set to 'Contains...'. Below the table, a message states: '1 - 5 of 50 records. Max display (50) records - search or filter for additional projects.'

| PROJECT                                      | OPTIONS | DES         |
|--|---------|-------------|
| <input type="text" value="Contains..."/>     |         |             |
| <a href="#">100952223 3761 N ELSTON AVE</a>  |         | B3-WIF ANI  |
| <a href="#">100947212 638 W WEBSTER AVE</a>  |         | RM FLC BEC  |
| <a href="#">100952182 1401 S ASHLAND AVE</a> |         | PD SITI AN' |
| <a href="#">100949635 2432 E 73RD ST</a>     |         | RT-TOV EXI: |
| <a href="#">100952183 160 N ELIZABETH ST</a> |         | PD PER COI  |

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- **How do I search for projects that are not listed in the Maximum 50 projects listed on the HOME page?**

If you do not see the project that you desire to view, follow the search criteria below.

**NOTE: PROJECTS HAVE NOT BEEN REMOVED FROM YOUR ACCOUNT.**




You will be required to Paste (or type) the Application Number into the **PROJECT** column search filter. This will execute the search immediately and display the project hyperlink.

The below example shows the results of a search, using the search filter, for a project that was NOT displayed in the - **Max display (50) records** – list.



Tasks (PF) Tasks (PD) Projects

All Projects Refresh Save Settings

| PROJECT                                   | OPTIONS  |
|---|--|
| 100913722                                 |  |
| <a href="#">100913722 2135 W HURON ST</a> |    |

1 - 1 of 1 records

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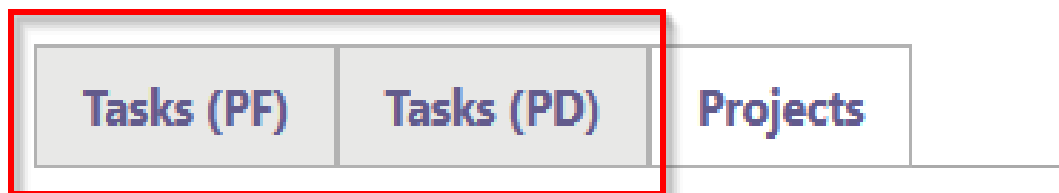
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- **What projects do I have active Tasks in?**

Tasks that are active can be viewed in the Tasks (PF) and the Tasks (PD) tabs while logged in and on the HOME page, near the top left corner.

**(Following system/workflow upgrade – November 16 - 18, 2018)**

- Tasks (PF) pertain to ProjectFlow workflow tasks and are assigned in workflows in projects that were created **AFTER November 16,2018 Upgrade**.
- Tasks (PD) pertain to ProjectDox workflow tasks (**Also known as “Standard Tasks”**) and are assigned in workflows created **PRIOR to November 16,2018 Upgrade**. (If you have not had project memberships prior to November , please disregard this button)



**All Projects**

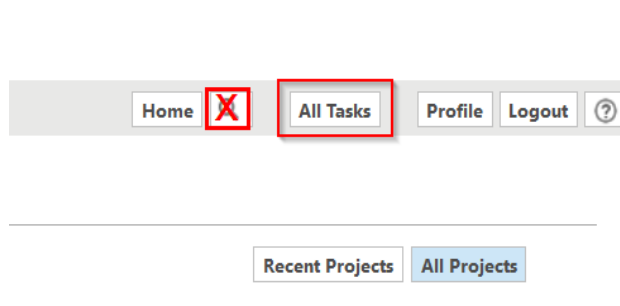


Refresh



Save Settings

Tasks PF and PD can be viewed simultaneously by clicking on the “All Tasks” button and will open a separate window that will display both types of workflow tasks.



**Standard Task List** ← **Tasks (PD)**

| Project Name                                 | Task     | Attached To | Status  | Priority | Due date | Created On | Updated On | Updated By | Cycle | Type     | District | LFPD | Zoning | Description |
|--|----------|-------------|---------|----------|----------|------------|------------|------------|-------|----------|----------|------|--------|-------------|
| 100630827_2933 N HARLEM AVE-LEAVE FOR AVOLVE | AssignPM |             | Working |          |          |            |            |            | 1     | Standard |          |      |        | Assign PM   |

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**ProjectFlow Task List** ← **Tasks (PF)**

Refresh Save Settings Reset Settings

| TASK                      | PROJECT     | GROUP       | ASSIGNMENT TYPE | STATUS      | CREATED |
|---------------------------|-------------|-------------|-----------------|-------------|---------|
| monitor                   | Contains... | Contains... | Contains...     | Contains... | On...   |
| ZON Assign Reviewers Task |             |             |                 |             |         |
| BLD Assign Reviewers Task |             |             |                 |             |         |
| Review Complete Task      |             |             |                 |             |         |
| BLD Certified Corrections |             |             |                 |             |         |

Direct all questions and concerns to [eplan@cityofchicago.org](mailto:eplan@cityofchicago.org)

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