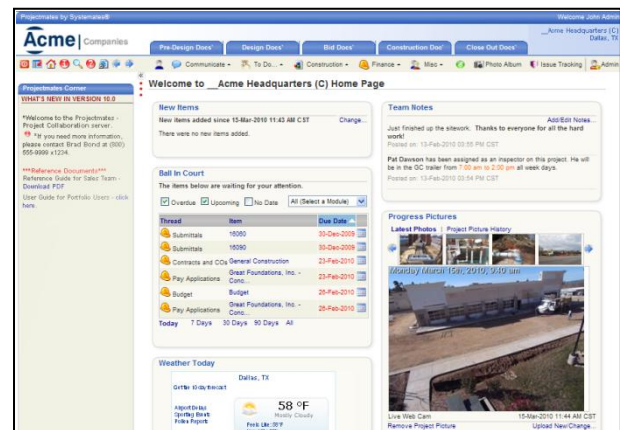# Projectmates

by Systemates

A simple solution for your complex project needs.

Projectmates is the project management software designed to simplify things, letting you keep track of tasks, handle changes and report progress with ease. You can coordinate with team members, letting people track their own work, which frees you to focus on making decisions.

Using a simple web browser, your teams can share drawings, documents, meeting minutes, discussions, project budgets, invoices and many more management processes. You will see immediate results in cost and time savings and reduced risks.

Projectmates includes all the functionality you expect from mission critical software, such as security, reliability, availability, and scalability. It's also customizable to meet the specific needs of your organization.

What makes Projectmates different?

- **Product maturity.** We're constantly looking for ways to make your experience with Projectmates better. We've released eight major version upgrades in the last eight years.

- **Mobile version available.** Where ever you are, Projectmates can go with you. It will work on smartphones and PDAs including devices with Microsoft Mobile 5.0, Blackberry OS and Palm OS.

- **Totally Web-based software.** There's no need to install software or a client. Projectmates is a 100 percent Web based product … you just need an Internet connection.

- **Worry free**. If you ever have a problem or question, you'll always have easy access to training classes and expert technical support.

- **Rich tools.** Projectmates has more than 35 different modules specifically tailored for your industry.

- **State-of-the-art reports.** You can stay on top of each project with Projectmates Portfolio reports. These easy-to-read summaries will give you valuable, up-to-the minute information at your fingertips.

- **Automated processes**. Administrative tasks such as sending faxes, following up on phone calls and tracking down missing information are decreased with centralized information control and automated workflows.

- **Informed accountability.** With external team members connected, responsibilities are clear and accountability is enforced.

- **Out-of-the-box productivity**. Projectmates avoids the time and expense of developing an in-house solution.

- **Customizable for added functionality**. You can customize Projectmates to fit your company's individual needs.

- **Flexible options**. Whatever your budgetary needs are, we have an option to meet them. You can rent on a per-project basis, get a dedicated server with the Total Control Solution or purchase an in-house installation.
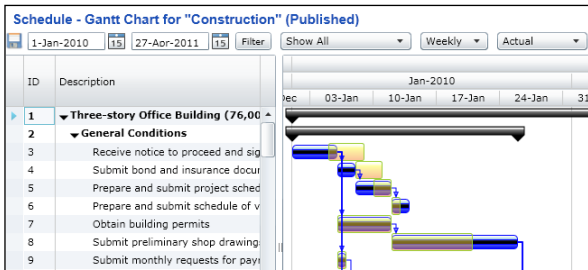
Projectmates Features

Projectmates is one of the most *complete* project management products on the market with more than 40 different features including:

Document Management
Contacts
Discussion Forums
Schedules
Punch List
Meeting Minutes
Bulletins
RFIs (Issue Tracker)
Submittals, Field Reports
Budget
Contracts/Change Orders
Purchase Orders

Repair Work Requests
Preventative Maintenance Work Orders
Proposal Requests/PCOs
Directives
Invoices/Pay Apps
Bidding (Online or Offline)
Parts Ordering
Do-It-Yourself Web Forms
Flex Forms / Custom Forms (Integrates with MS SharePoint and InfoPath)
Backup/Archive
Mobile Accessibility
Portfolio Reports
Customized Ad-Hoc Reports

Document Management

When you're working in a collaborative manner, it's all too easy to overwrite each others' changes if you aren't careful. Projectmates' document management software provides a built-in **version control** system which enables you to keep historical versions of the files, and a **full-text search** helps you find information quickly. Document approvals help you keep "single version of truth."
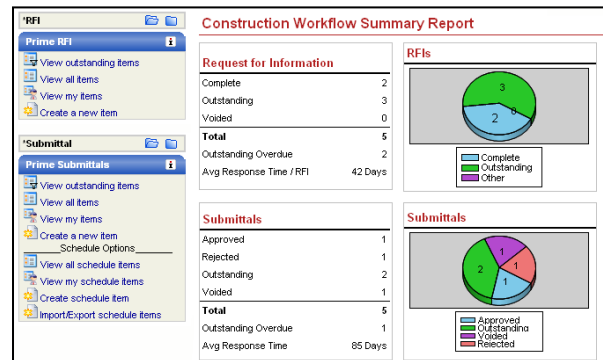

General Project Workflow

Projectmates provides many general work-flow modules that help you save time and money. These include **to-do lists**, **contacts**, **meeting minutes, schedules, a discussion forum, custom forms** and more. Projectmates work-flow management tools significantly reduce paperwork. Teammates will know exactly what is expected of them and will have access to calendars, task lists, and e-mail notifications so they don't miss a deadline.

Construction Workflow

Manually handling the request and approval process is usually time and labor intensive and doesn't allow you to easily track the status of requests.

Projectmates' built-in features solve these problems by providing intuitive form routing and tracking tools to those responsible for processing requests. Now, you can spend more time managing projects, not paper.

The software provides a simple Web interface for submitting requests and provides an automatic e-mail notification to everyone responsible. This minimizes data entry and eliminates the need to know where to send requests for approval and fulfillment. The role-based security makes sure that users have appropriate rights to each module.
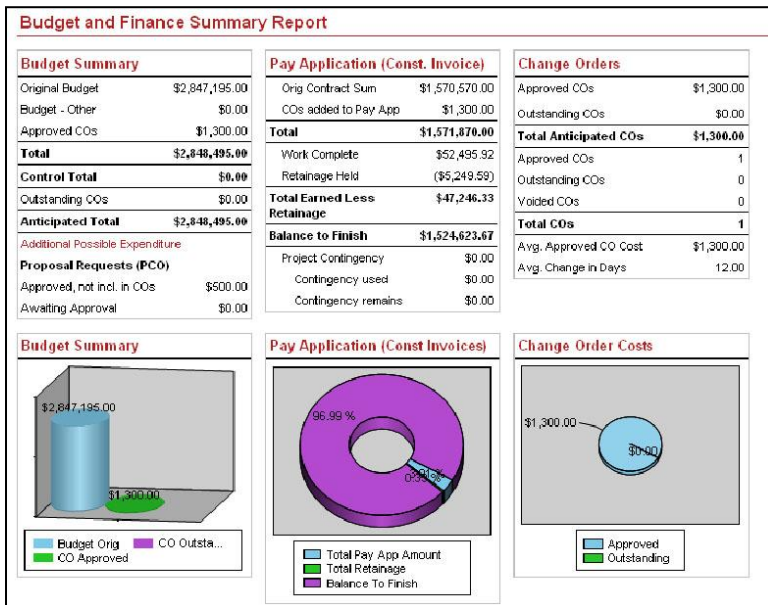
RFIs and **submittals** can be created to facilitate the entire question and answer process between owners, designers, consultants, general contractors and subcontractors. The status of the RFI and all actions taken are documented in Projectmates and can be accessed at any time.

Design professionals, owners and owners' representatives can prepare **field reports** in Projectmates to record construction conditions and progress. The report format is based on **AIA** standards and can include digital photos or other attachments.

The construction manager can report and track the work and progress of the project using a **daily field report**. The report is broken down into five categories — work description, weather, manpower, equipment and events. The report may be saved for quality assurance and review before making it available for other users. This report format is also based on **AIA** standards and can include digital photos or other attachments.

Construction Finance and Budget

The contract management feature saves the project leader time and energy by coordinating tasks with vendors, suppliers and other related project participants. It acts as a bridge between your accounting system and project management system. As a result, the project leader has enhanced control over subcontracting activities. This helps boost the project's profitability and timely completion.

Projectmates' **subcontract** feature allows you to manage each contract with dozens of vendors effortlessly. Subcontract modules are four individual modules interconnected with each other, working as one unified subcontract management tool. The modules provide ability to create buyout/bid packages, analyze and compare vendor bids and convert bids to contract. **Contracts** can be tracked for **change orders**; **purchase orders** can be issued; and **invoices** can be entered. Information from subcontract modules is automatically tracked in budget helping you to stay on top of project expenses.

Change directives can be used to direct the contractor to perform work not included in the contract. After the contractor completes the work, he or she can submit costs to the owner for review and issuance of a change order.

Owners or design consultants can issue **Proposal Requests (PR)** to solicit proposals for changes to the original contract. A Proposal Request is sometimes referred to as a **Proposed Change Order (PCO)**. Proposals received in response to a proposal request help in making financial decisions. Design professionals prepare the documentation for the Proposal Request. After the owner has approved the contractor's quote, it can be incorporated into the contract by means of a change order in the construction contract.

A **Change Order** can be used in implementing changes in the work agreed to by the owner, designer and the contractor. Initiation and approval of the change order in Projectmates indicates agreement upon all the terms of the change, including any changes to the contract sum and contract time. Approved Change Orders can be added to your Budget in Projectmates. Approved proposal requests can be automatically linked to a single change order. Non-electronic submittals, such as material samples, can also be tracked.

The **Pay Application**, also known as Invoices or Progress Billing, can be created in Projectmates to document work completed and to prepare a pay application for the owner's approval. Approved change orders are automatically included in the pay application and are automatically displayed in your **Budget**.

During construction, Project **Budget** can change due to unforeseen reasons. The Project Budget module is designed to track and manage budget revisions, approvals and export budget information to external programs such as Microsoft Excel. When entering revisions, the user can see the impact of the revision on the project margin and profitability. Budget revisions can be attached to change orders for detailed

cost and revenue breakdown. Additionally, schedule of values can be prepared instantly without re-keying the information for owner invoicing. You will be able to view a complete audit trail of all changes made. This control over budgets helps you to manage projects profitably; it also assists in fine-tuning the bidding process for future bids. At project completion, you will be able to compare your budget against actual costs and measure accuracy.
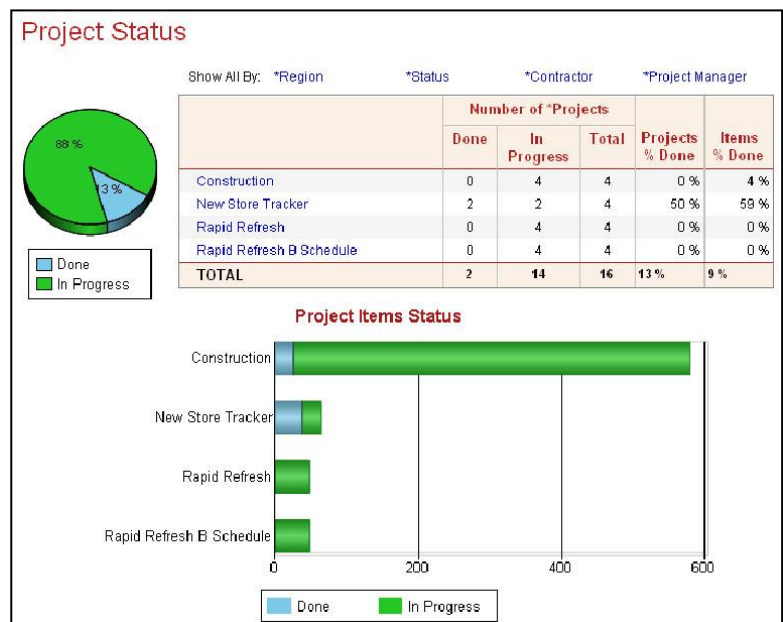
Backup and Archive

The Backup & Archive goes beyond traditional backup by including all your uploaded native documents and creating an HTML version of all your dynamic pages. It also neatly packs information in a single downloadable zip file. The utility even notifies you by email when the backup is ready for download. You can burn files to CD, making it a permanent project archive.

Portfolio Reporting

Projectmates Portfolio lets you organize projects into logical groups called portfolios, much as an investor would manage stocks. With projects organized into portfolios, you can generate analytical reports that can capture project objectives, costs, timelines, accomplishments, resources, risks and other critical factors.   Executives can regularly review entire portfolios, spread resources appropriately and adjust projects to produce the highest returns.

The obvious benefit Projectmates Portfolio **enterprise reporting software** brings is that executives get a bird's-eye view of projects so that they can keep close tabs on progress.   The most appealing feature of Projectmates Portfolio is the focus on projects as a portfolio of investments and their anticipated risks and returns in relation to other projects.

Using Projectmates Portfolio, you align your company's projects with strategic business goals.   You can judge projects based on the contribution they will make to your long-term goals.   The Projectmates Portfolio **enterprise reporting** framework provides the information you need to evaluate projects that are completed, under way, or under consideration; so you can focus on the ones that will carry your business to sustained success.

Custom Forms

Designing custom forms takes just minutes with do-it-yourself Web forms and requires no programming knowledge. Quickly and easily integrate electronic versions of forms unique to your project and company. Creating form templates for timesheet, expense reports, and meeting minutes is simplified using rich user-friendly tools provided by Projectmates. Additionally, custom forms can be designed using **Microsoft Office InfoPath 2007**. InfoPath is a desktop tool to create forms using the drag and drop feature provided by Microsoft Office 2007.

Projectmates provides a centralized place to upload and manage forms created using InfoPath. Once uploaded, they can be used within Projectmates by users using a simple web browser.

Bridging the Gap ...

Projectmates provides budgeting, contracting, invoicing, and purchasing modules among its extensive repertoire of over 35 different modules. It's a great way to track project costs collaboratively. However, it is sometimes necessary to exchange data between Projectmates and other accounting software to avoid duplicate entries and data entry errors.

The Projectmates Data Exchange feature builds a bridge between Projectmates and third-party applications. For example, when the project manager approves change orders in Projectmates, the third-party accounting software can be updated to note the new cost application, avoiding duplicate entries and data entry errors.

What are the keys to successfully implement a Web-based project management system?

- Get support from senior management.
- Implement from operations.
- Integrate with (not add to) the existing project management processes.
- Build a collaborative platform into the process from the very beginning.
- Provide a proper training program.

Who uses Projectmates?

More than 25,000 users representing hundreds of companies use Projectmates on an enterprise level.

How do I get Projectmates?

For more information or to schedule a demonstration, you can contact us in a variety of ways.

U.S. mailing address: 1700 Pacific Avenue, Suite 2290
Dallas, Texas 75201 USA

Phone: 214-217-4100

Fax: 866-462-6314

Internet: www.Projectmates.com

E-mail: info@systemates.com

How has Projectmates helped companies?

The one thing I can say is it reduces paperwork a lot, and it speeds up time of delivery for us. The workload doesn't go away. You still get the same amount of workload. It just became more efficient from what we use to have before.

I think Projectmates is much better in the sharing of documentation. The whole collaboration that brings in all the vendors in every project set up … that's something we didn't have before.

Customer service has been excellent, I have to say. They have been doing an outstanding job. I don't think there is a single time I have requested something and they didn't deliver."

— John Vryondes
Office Depot

It is a complete solution for us. It allows us to have everything concentrated in one area. Anything that anyone would ever need to look at is included: an RFI, a submittal, anything as far as the project progress is going. I think it's a great tool.

— Karen Shaw
Harvest Partners

Before Projectmates, in order to give someone a factual rendition of how much money was spent I couldn't do that without manipulating about four different programs. Now all of that information can be found within Projectmates in that one project. It's a vast improvement.

We research budget numbers off of past projects to bring forward and basically create a Reading Hospital cost standard. Projectmates gives us and senior administration the tools we need to make determinations on whether a new project will be profitable for us on a turn around basis and ROI process to determine whether we want to fund that project or not.

When it comes to taking care of paperwork, approvals and sign-offs on an awarded bid, what used to take a two-week timeframe can now be done within 24 hours with Projectmates.

One of the greatest strengths of Projectmates is the ability to open up any kind of drawing in the system, whether it is a PDF, CAD drawing or you name it.

With Projectmates and the help of your staff we have been able to cut hoops and loops out of the way we use to do business.

— Dave Major
Reading Hospital and Medical Center

With Projectmates, there's a lot less people saying 'I never got that,' or 'I never got this.'

— Kenton L. Girard
Bridgestone/Firestone

Projectmates increases productivity so that our projects can be more profitable. I can use less people to get more work done!

The Projectmates features are all pretty good. We use it mainly for the shop drawings, daily reports from the inspectors, the photographs, the RFIs, field orders and some of the standard documentation.

The punch list and photo album part works real well for us because that way everybody sees what's going on and everybody sees when it gets done.

Use to be I could only manage about six jobs at once, and now I can manage about 20 of them at a time.

We can get a lot of information passed back and forth really quickly and real efficiently because once something gets submitted or gets put online it's there for all of us to see.

— Mike Querry
Trinity River Authority

Projectmates has done a very good job of making the time shorter for us to get our information… it saves a lot of time for us.

— Rachel Graves
Duckwall-ALCO Stores, Inc.

Projectmates has definitely improved team collaboration. You are able to have all the information on how decisions are made through your discussion threads.

Projectmates helps us to coordinate and have a better set of construction documents because we are able to document how and why decisions were made. This translates into profitability.

If you're looking for total project management, total project organization, being able to see how decisions are being made and how those decisions impact a project ... Projectmates is a good software tool.

— John Klein
VLK Architects

One of the main ingredients for successful project management is communication between architect, owner, contractor and subcontractors … everyone who is involved. That's why we use Projectmates so much.

Accountability management for your architects, your owners, contractors and your subcontractors is a big ingredient with projects. Projectmates gives you that local spot where all communication is dumped so you have that accountability factor.

The Projectmates team has been really good to work with which makes choosing software a little bit easier.

The tools in Projectmates have eliminated the hassle of preparing bids. I absolutely love it.

Daily field reports let us know what is going on with a project, where the project is at and who is at the site.

Without Projectmates I don't think we could finish projects quite as well and/or as fast. Even if someone isn't logging into the system we can still do it in the system and have them notified via e-mail. It keeps everyone in the loop throughout the whole life of the project.

Customer service has been great. Any time I have a question I can call and also your support responds to emails really quickly.

— Lisa Carr
Jim Carr Construction

With Projectmates, all of our information is in one place including responses to RFIs, scheduling, meeting minutes and the job progress pictures.

When we made our decision on what construction project management software to purchase, we compared the software that was on the market, and Projectmates was chosen over the others. We chose Projectmates because it is easier to use than the other products and also the archiving feature gave us piece of mind that we wouldn't have with the competition.

— Marie Fiore
Stony Brook University Hospital

Projectmates has definitely impacted the effectiveness of communication, effectiveness and efficiency with our projects.

Before using Projectmates, I had used two other construction management software products. Projectmates is a better tool than what I have used before.

Without Projectmates a lot more time and dollars would be spent simply because it would take a lot longer to process information from one person to another, especially since we are nationwide.

— Jeanine Hay
LifeTime Fitness/ FCA Construction

"Very impressed with Projectmates."

"This is the first project I have followed (Project Controls) using this and it looks like my job is going to be a lot more efficient as a result! Thanks!!!"

Nick Sidley
ExxonMobile

"Praise for Projectmates! After using it for over 3 years now, I had an abrupt reality check a few months ago when I was required to use another system for a client. WOW! Didn't know how good I had it. Everything I needed to get too seemed around your elbow to get to your ankle. Now that the project has ended, I'm so relieved to be back in solely a Projectmates world."

"I also have to say that Projectmates Support staff is always super responsive when I call with a question or just run into an unfamiliar process."

Larissa Wiley
Sunbelt Services

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