

What's new in Projectmates

Every new version of Projectmates brings a number of enhancements. These enhancements represent our continued commitment to helping make your job a little easier.

May 2008

Projectmates V8.2

Major Changes

- **Approval Amount Thresholds-** specify approval threshold per approver for Bid Packages, Contracts, Change Orders, Purchase Orders, Invoices, etc.
- **NextGen FlexForms-** Ability to import MS Office InfoPath forms directly into Projectmates FlexForms.
- **Required Attachments for Subcontracts-** Specify the types of files required to be attached to Change Orders, Invoices, etc. and ability provide a template for the required files.

General Items

- Tags added to subcontract modules and line items
- Comments added to Directives
- Ability to copy contract and schedule tags
- Added Billable/Non Billable button on RFI
- Ability to update existing Budget line items upon import
- Select Payment From user for POs and Invoices
- Ability to keep a contact in the contact manager when converting to a user
- Automatically populate subcontract group drop-downs from Budget groups
- When deleting a contact, if that contact is in use, Projectmates will show a list of Projects and Modules the contact is being used in
- Ability to add a new contact when adding to and from users in subcontract modules
 - 2 new custom fields for CSI numbers
- Only Project Admins and Co Admins can delete invoices in the approval process
- Revised Compatibility Test
- Send multiple Budget items to Pay App Schedule of Values

November 2007

Projectmates V8

Major Changes

- **Project Report Dashboards-** enhancing the reporting capability with more information and greater flexibility for all users.
- **“My Calendar” shows “Ball in Court” (BIC) items** in calendar as well as list views. You can now click on the link for a BIC item and jump directly to the item.
- **Project Information** screen includes 20 Accounting and 80 other custom fields in 5 customizable tabs. Site Administrator can configure these tabs and field names for their Projectmates server.
- **Advanced Site Layout customization** allows Site Administrators more control over the Projectmates menus and layout of icons.
- **Document Management Approval** allows users to select a file or a folder for approval process. Now you can select your design package or report files for the online approvals.

- **Required files for sub contracts.** Administrators can list required files to be attached with the Contracts, Change Orders, and Invoices. A template file can also be attached for each required file so that users can download a template, fill it out, save and upload to a Change Order or Invoice. For example Administrators can specify files to be completed, such as Lean Releases, before submitting an invoice.
- **User Profiles:** Site Administrators can attach user related files to the user profile. For example: user certifications, qualifications, copy of insurance, etc. can be attached to the user's profile.
- **Contacts can have skills** as well as files added to the profile.
- **Data Dump:** Ability to download the entire module data in tab separated text format for site administrators. Datadump is enabled for RFI, Schedule, Action List, Part Order, Flexform and Discussion Forum
- **Ability to import part orders** using MS Excel template.
- **Project Mini Reports:** Project level mini-reports to quickly review project progress.

June 2007

Projectmates 7.7.1

General Items

- Project Administrators now have the ability to modify approver names for existing change orders
- Improved Budget custom fields to better support division calculations.
- User profile "internal user number" is now changeable by Site Administrators only.

Parts/Equipment Ordering System (Phase III)

- Ability to create assemblies and add assemblies to an order.
- Use multiple keywords to quickly add part items.
- Reason codes for "Add On" orders.
- **Part Order Communication Bridge:**
 - Ability to resubmit an order to a supplier
 - Ability to submit orders to supplier via email.
 - Ability to process orders manually for orders sent via email.

April 2007

Projectmates 7.7

Approval Process

- Approvals initiated or approved/rejected, assigned approvers are emailed

Parts/Equipment Ordering System (Phase II)

- Site Administration ability to manage predefined suppliers to be selected for each part order
- Customized naming for "parts", "part number" and "suppliers" through the Site Admin Localization file
- Part Order Communication Bridge:
 - XML output with bridge breaks down the delivery location information
 - Supports sending to HTTPS addresses
 - Supports C Range IP addresses
 - Ability to reset received order for modifications
 - Ability to modify the shipping address

- Ability to send orders directly to manufacturers/suppliers in XML format

Contact Manager

- Ability to restrict creating custom categories
- Ability to enable other users to edit/delete shared contacts owned by other users
- Category filtering capability if number of categories is greater than 50
- Duplication check for contacts with same first name, last name and email address
- Ability to convert existing contact to a user with a click of a button

Bids

- Option to display bids in the Bids/Plan Room module to only invited users
- Bid Open Date not a required field
- Ability to import list of invitees from other bids
- Ability to send interested/not interested notification to potential bidders, to include contact information, and option to not send bid details
- Ability to add new contact from the bid invitee screen
- Ability to notify subscribers and invitees when addendum is published

Construction Management

- Customizable Group headings through the Site Admin Localization file
- Customizable Budget column headers on a site-wide level
- Ability to add eight customized accounting fields through the Site Admin Localization file for subcontract invoices module
- Log pages display responsibility and last action status

Schedule and Action List

- Ability to link multiple action list items to a single schedule task. Projectmates updates the status of the schedule task as Action List items are completed and verified
- Action List Group 1 and Group 2 data can now be exported
- Gantt Chart display can be filtered to only items applicable within a specific date range

General Items

- Project listing page: ability to view project pictures in project log
- Browser Functionality Test now includes images with the step-by-step instructions
- Ability to export project information, modify data and re-import to update project details
- Allowable phone number formats include using dashes or periods. Phone numbers entered with no formatting at all will be automatically converted to (999) 999-9999

December 2006

Projectmates 7.6.2

Parts/Equipment Ordering System (Phase I)

- Ability to create master list of parts and equipment

- Ability to order parts as needed
- Ability to approve orders
- Ability to send order to supplier
- Reports to view order statuses

* Note: Parts/equipment ordering system is turned off by default. Enable it through site admin "Manage Site Layout" module.

December 2006

Projectmates 7.6.1

Major Upgrades

Campaign Module (Projectmates for Retail)

- Training teams can be defined and scheduled before start of the campaign
- Teams can be broken down by working week or period
- Unassigned teams can be reinitialized any time without losing assigned team data
- Ability to filter teams, calendar and maps by name and rename multiple teams at once
- 3D integration and the ability to download map data to **Google Earth** and other GPS applications (KML format)
- Unassigned users Portfolio report supports date filtering
- Notify resources via telephone about upcoming assignments

Site Admin

- Active users can be exported to an .XLS file, updated and re-imported

Schedule Module

- Ability to add comments, assign flags and track time spent on a task similar to action list
- Schedule permissions include "Edit" and "Delete" rights

Bids Module

- When adding bid invitees, filter by skills criteria can be set to match "any" or "all" skills specified
- Bid Invitees log now includes main contact phone number column
- Bids & Plan Room includes keyword file descriptions

Other Upgrades

Site Admin

- User import now includes Internal User Number
- Import process checks for matching column headers to confirm most current template is being used to import data

Project Administration

- Permissions for the Request for Information module can now be set to "respond only"

- FlexForms can be defined with immediate “copy to” email notifications

November 2006

Projectmates 7.6

Major Upgrades

Projectmates Themes!

Site Administrators can now change the look and feel Projectmates Site Layout.

- Select site color options or order custom colors
- Set menu icon sizes to 16x16 or 26x26
- Project menu icons replaceable by user-defined graphics
- Project menus can be grouped, ungrouped and re-ordered using ‘Drag-and-Drop’ functionality

Co-administrators

- Project Administrators can assign an unlimited number of “co-administrators” which will share all Project Administration functionality for a project with specified users. Co-administrators will not be able to copy project information or assign other co-administrators

Mobile (Projectmates Mobile)

- Ability to access “My Calendar”
- Campaign assignment confirmations are available through the BIC and My Calendar

Campaign Module (Projectmates for Retail)

- Campaigns and associated threads can be parked and unparked for archiving
- Creating Campaign templates now includes the option to copy based off a parent template from within step1 without going through the copy screen
- Assigned resources can be added to assigned stores during the copy process
- Campaign teams can be built based on custom project information fields
- Internal notes can be documented for assigned resources per campaign
- Assignment notifications can be emailed to individual teams
- Resources can be assigned to multiple teams

Other Upgrades

Site Administration

- The “My Projects” left side message bar is now customizable through the Manage Welcome Messages screen
- The import process for Site-wide non-working days now includes keywords
- Users skills can be imported

Project Administration

- SubContract Packages can be copied to other projects

Portfolio Module

- Includes an unassigned resources report for the Campaign module
- Portfolio Delivery date offers an "after" option for getting portfolio reports for data in the future, such as upcoming punch list items, unassigned resources report for next month, etc

Bids Module

- Add Bid invitees easier by filtering for users with "Bid" access or defined skills
- Publication history for Bid Status, Addendums, Q&A and Award Info is now available on the Bid Details screen

September 2006

Projectmates 7.5

Major Upgrades

New Module: Project Scheduling for Merchandisers

This new module enables users to determine routes for large, standardized schedule tasks at multiple locations utilizing integrated Microsoft Live Maps. In addition, resources can be assigned to tasks based on user skill sets, user and site holidays/black out days, and resource-to-location distances. When the route changes, the schedule for all the entire route can be updated from one place.

Construction Subcontract Packages Available for Bidding

We've bridged the gap! The Bid Manager module can now include Subcontract Packages in bids allowing bidders to input specific dollar amounts to packages. Subscribed bidders and their bid submission amounts are automatically added to the Package module resulting in instant analysis of submissions and easy creation of sub contracts.

My Calendar

Added "My Calendar" to view all assigned tasks from all modules in a calendar format and allow confirmation capability for pending tasks assigned in new project scheduling area. Currently can view more details on any schedule assignment, more modules will be added in future versions.

Minor Upgrades

- Site Administration additions include site-wide management over:
 - Submittal Status Options
 - Schedule Non-Working Days
 - User Skills
 - User Holidays
- Ability to create multiple new projects or stores at once through an import process
- Manage site customizations through a "localization" file including 25 custom project fields, site verbiage and Action List images
- Bids/Plan Room user interface modifications include:
 - Cleaner Bid Details menu
 - Changed layout and language to make bidding easier to understand for new users
 - Users can specify working days, personal holidays and skill sets for use in project scheduling or as a standalone database of these items
- Document Management and Portfolio now has drag-n-drop capability for changing the displayed sort order.
- All data import templates have been reformatted for consistency
- "Deleted Users" are now titled "Inactive Users"

- Ability to export contacts from the Contact Manager
- Increased size of the "category" field for contacts in the Contact Manager

June 2006

Projectmates 7.4.2

- New modules added to Projectmates MOBILE which enables access to:
 - Document management
 - Photo album
 - Discussion forum
- Ability to add customized tags to Action List/Punch list
- Easier to navigate Site Admin menu

April 2006

Projectmates 7.4.1

- Ability to add anticipated and actual time to Action List tasks
- Ability to delete at thread level across multiple projects using a template
- Easier to use bid licensing administration

February 2006

Projectmates 7.4

Major Upgrades

- Supports Microsoft SQL Server 2005
- More granular control over per user rights using new licensing scheme
- Ability to search inside the files using keyword (requires per server license)

Minor Upgrades

- Ability to filter "Since your last visit..." and "Ball-in-Court" by date
- Ability to park module threads
- Ability to undelete deleted users
- Text box character counter for all major text boxes
- Site configuration option to enable/disable project Inbox
- Ability to send any page by email to users as well as contacts
- Ability to add custom Microsoft Word templates for subcontract Contracts
- Tighter integration between all subcontract modules and Budget
- Ability to add subcontract Change Orders
- Ability to export subcontract Invoice to Microsoft Excel
- Ability to reset individual approvals for subcontract modules
- Ability to add custom fields for Budget
- Ability to add custom formulas for Budget
- Ability to select which column can be exported from Budget to Pay Application Schedule of Values
- Ability to copy Budget setup from one project to another
- Ability to add comments for Pay Application
- Ability to expand/collapse parent tasks in Schedule
- Floating toolbar for Schedule
- Ability to disable tasks in Schedule
- Request for Information (RFI) private conversation can only be viewed between the sender and the recipient

- Ability to sort by latest action on Submittal Index page
- Submittal Index page shows a link to old submittals when it is resubmitted
- Paging added to Schedule and Action List
- Ability to mark Action List item as "Not Applicable"
- Ability to send Action List items by email to responsible persons
- Ability to send bid invitations to users as well as contacts
- Ability add/remove files on behalf of the bidder
- Ability to label versions while uploading files
- Ability to sort items by groups for Action List for Projectmates *MOBILE*
- And, numerous other upgrades.

September 2005

Projectmates 7.3.1

Major Upgrades

- Projectmates *MOBILE* for Treo 650, Blackberry and Microsoft Pocket PC-based smart phones and PDAs (requires per user license)
- Support for biometric fingerprint recognition devices for login and approvals (requires per user license)
- Active Directory Synching (requires per server license)

Minor Upgrades

- General: Advanced Edit Role Properties - Copy Roles into new roles per thread
- Schedule: Expand/collapse parent tasks
- Portfolio: Dynamic list of projects per user
- Portfolio: Dynamic list of projects per portfolio
- Pay Application: Added 4th person in the approval process
- RFI: Logs can be sorted by latest action
- Submittals: Logs can be sorted by latest action
- Submittals: Ability to change the first recipient when creating a new submittal
- Proposal Requests/PCOs: Logs can be sorted by latest action
- Bids: Bid Invitations can have customized message
- Site admin: Ability to view licensing usage
- Inbox feature is suspended.

July 2005

Projectmates 7.3

New Module: Subcontracting

- Bid Package: Allows management and analysis of subcontract bids
- Contracts: Allows management of subcontracts
- Purchase Orders: Allows management of POs
- Invoices: Allows management of subcontract or PO invoices

Major Upgrades

- Multi-threaded Daily Field Reports
- Ability to specify weekdays for Schedule
- Ability to specify holidays in Schedule
- Enhanced Budget Module with tight integration with Subcontracting modules
- Icon indicator if document markups exist in the Java-based viewer
- Enhanced performance when copying modules from one project to another

- Enhanced approval process for FlexForms
- Ability to specify secondary password for approvals
- Also, tons of minor enhancements and fine-tuning based on your comments and suggestions

March 2005

Projectmates 7.2

Major additions

- Portfolio tab can be made default tab upon login
- Projects can be sorted by project number, name and location
- Completely reworked Ball-in-Court and New Items listing for faster performance

Upgrades for Installed Solution and Total Control customers

- Ability to customize color scheme
- Ability to copy data and settings selectively from project to project
- Ability for site administrators to act as project administrators
- Miscellaneous enhancements to site administration area

January 2005

Projectmates 7.1.5

Major additions

- Import/export budget line items
- 3-week look-ahead for Gantt Chart
- Ability to copy Action List data from one project to another
- Ability to copy files and folders from one project to another
- Ability to assign Action List responsibility and due date for multiple items at once
- Ability to mark meeting topics as "Hot!"

Upgrades for Installed Solution and Total Control customers

- Ability to manage FlexForms from super admin area
- Ability to edit "Projectmates Corner" from super admin area
- Ability to edit CSI Division and Sections from super admin area
- Ability to park/unpark projects from super admin area
- Option to allow access to all projects for Portfolio from super admin area
- Ability to save/run recently viewed Portfolio reports for later retrieval
- Ability to localize Projectmates Server

November 2004

Projectmates 7.1

Major additions

- Ability to track multiple versions of the same name files and name versions (document management version control)
- Ability to create and track submittal schedule
- Ability to create workflow forms using XML-based FlexForms

Minor additions

- Ability to download and upload multiple sub folders with a single click
- Files can be attached to routed submittals
- Ability to edit submittals
- Ability to edit RFIs
- Users other than project administrator can create project archives
- Ability to attach files to pay application certification sheet
- Ability to add multiple contingencies to pay application and budget
- Ability to add multiple amendments to pay application schedule of values
- Ability to show uncommitted funds in budget
- Ability to copy threads from one project to another

August 2004

Projectmates 7.0

Projectmates Portfolio (New Product)

- Ability to group multiple projects in portfolios based on common characteristics
- Works in conjunction with Projectmates Collaboration Server
- Ability to create custom portfolio dashboard to view LIVE data
- Dozens of predefined reports complete with drill-down details
- Schedule reports for automatic delivery to anyone via email or the Web
- Export to PDF, Microsoft Excel, HTML, XML, and other formats
- Ability to connect to other software packages, such as HR, Accounting, job prospecting, etc
- Ability to evaluate project status and quickly identify at-risk and under performing projects

Construction Management

- Ability to create multiple instances of RFI module (threads)
- Ability to route RFI between threads
- Ability to attach multiple files to RFI
- Ability to create multiple instances of Submittal/Shop Drawing module (threads)
- Ability to route Submittal/Shop Drawings between threads
- Enhanced display and formatting for project budget

Transmission Log

- Stores the actual text of email or fax transmissions that are sent using the universal "Send To" drop down box
- Store all the file upload notifications
- Ability to archive the log and the details

Inbox

- Customizable inbox email addresses, such as example, myproject@www.projectmates.com
- Ability to create multiple inbox instances (threads)

Action List

- Ability to display task by user

Change Order

- Printable version displays addresses of all parties who need to approve CO

Meeting Minutes

- Archive comments

General

- User input validation for calendar
- Ability to copy Microsoft Excel templates from one project to another
- Ability to copy shared contacts from one project to another
- Ability to copy all options from one project to another with a single click
- Numerous miscellaneous security and functional enhancements