

New Features in Projectmates V18.0

DocuSign Integration for Document Management, Contracts, COs, and Purchase Orders

Projectmates will support a comprehensive integration with DocuSign e-signature technology. It is the world's #1 e-signature solution and is utilized by a majority of the Fortune 500 companies.

Users will be able to customize, distribute, and track e-signature requests to both users and non-users on a simple, easy-to-use interface. The requestor can streamline the process by prefilling basic information for the signers, which leaves them with only the simple task of signing off the document. Signing is easy and requires no registration, although we recommend that frequent signers register for a free DocuSign account to further customize their signature.

An integrated e-signature solution has been a highly requested feature from many Projectmates clients, and we're excited to be introducing it with version 18.0.



DocuSign: DAL Convention Center Contract.pdf

Signees

Signer 1 [Select...](#)

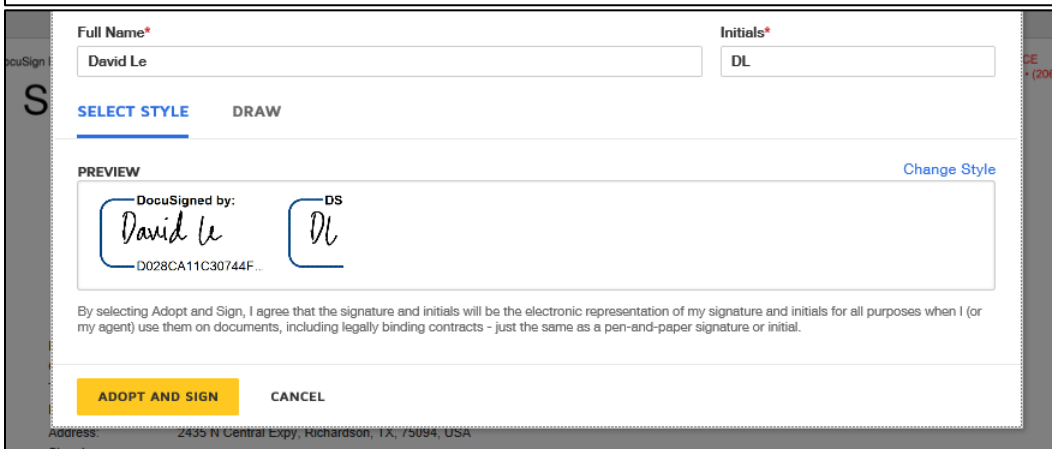
Email	Name	Company	Title	Address
donovan.noguez@systema	Donovan Noguez	Systemates Inc	Project Manager	2428 N. Central Expressway, Richardson, TX, 75080, United States

Signer 2 [Select...](#) [Remove](#)

Email	Name	Company	Title	Address
david.le@systemates.com	David Le	Systemates Inc	Director of Construction	2435 N Central Expy, Richardson, TX, 75094, USA

[+ Add another user](#)

[Start Sign Flow](#)

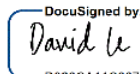



DocuSign

Full Name* Initials*

S [SELECT STYLE](#) [DRAW](#)

PREVIEW [Change Style](#)


DocuSigned by:  

D028CA11C30744F...

By selecting Adopt and Sign, I agree that the signature and initials will be the electronic representation of my signature and initials for all purposes when I (or my agent) use them on documents, including legally binding contracts - just the same as a pen-and-paper signature or initial.

[ADOPT AND SIGN](#) [CANCEL](#)

Address: 2435 N Central Expy, Richardson, TX, 75094, USA

Signature: 

For additional information and any inquiries on the cost associated with setting up DocuSign integration, please reach out to info@systemates.com.

Enhancements

Creating Contracts/POs/Invoices from the Budget

When creating a Contract, Purchase Order, or Invoice from the Budget, “Check to import category name” is now an option. Selected items will be sorted based on their budget category/group in the Items area. This option was previously only available for Bid/Buyout Packages.

Group	Budget/ FundCode	WBS/ Section	Description
		B	C
	01000		Structural Engineer
	02000		Civil Survey
	02000		Inspections
	02000		Reimbursables
	02000		Site Report
2.0 Design	Architect Contract	00000	Architectural Drawings
	Architect Contract	00000	Architectural Fees

Item #	Budget/ FundCode	WBS/ Section	Description
001		00000	Architectural Drawings
002		00000	Architectural Fees

Cost Tracking Approvals – Revise & Resubmit

Revise & Resubmit will be introduced as an option when approving cost tracking items. This will cancel the entire approval and prompt the submitter to revise the item. The user must then initiate the approval process again.

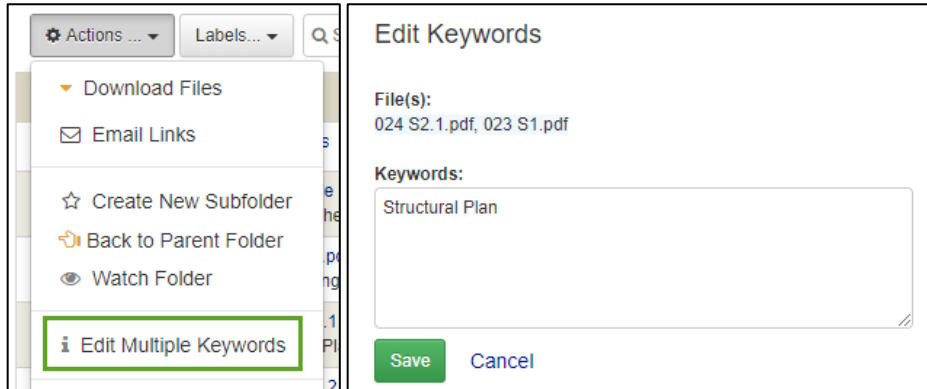
Name or Role	Status	Actions
1 Construction Project Manager	Pending	Approved Rejected
2 David Le Systemates Inc	Waiting for previous approvals.	

Reset Approvals Change Approval Type **Revise & Resubmit**

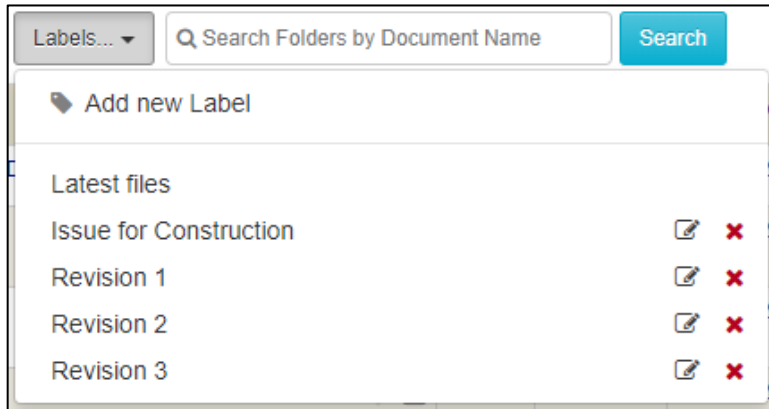
Document Management – Edit Keywords and Labels for Multiple Files at Once

Users with Manage rights in a Document menu will have more options for making changes to Keywords and Labels.

- Multiple files can be selected to have their keywords edited at once.



- Labels can be deleted and renamed without deleting the file. Deleting/editing a label will only affect the specific versions that have been assigned the label.
- Renaming a label to match another one will merge the two labels together. This will be useful if a typo was made when attempting to upload files under an existing label.



Printer Friendly and Email



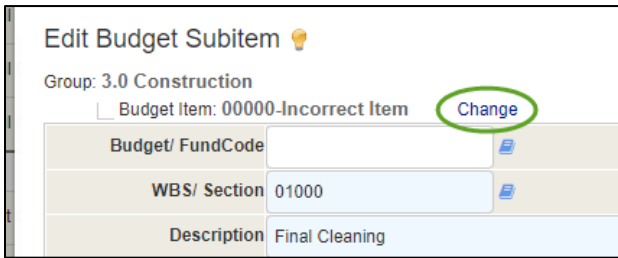
The Printer Friendly view and emails sent from the Email button will now display the Created by and Last Modified by users. This will affect all Construction Management, Cost Tracking and Custom Business Process items.




Overdue Notice – Action List

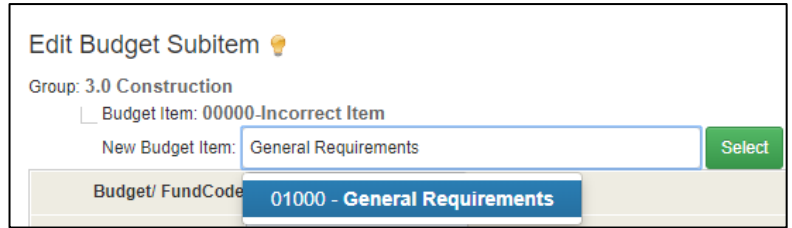
Overdue notice emails regarding Action Lists will now contain the Project Number as well.


Budget/Cost Tracking – Moving Subitems

Budget subitems can now be moved to another Budget item. The subitem will maintain any links to financial items that it currently has.



Edit Budget Subitem 
 Group: 3.0 Construction
 Budget Item: 00000-Incorrect Item Change
 Budget/ FundCode 
 WBS/ Section 01000 
 Description Final Cleaning



Edit Budget Subitem 
 Group: 3.0 Construction
 Budget Item: 00000-Incorrect Item
 New Budget Item: Select
 Budget/ FundCode 01000 - General Requirements

Budget/Cost Tracking – Linking Change Orders

When a Contract is linked to the Budget, any Change Orders created from the Contract will also automatically link to the budget. In previous versions, this automatic linking occurred the moment the Change Order’s Approval tab is visited. **The automatic linking will now occur after the first approver has approved the item.**

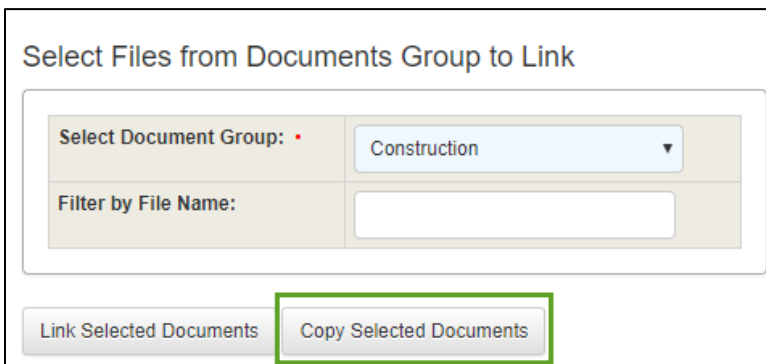
This will give the first approver time to manually link the change order for clients who want their change orders linked to specific areas of the budget.


Copy Selected Documents

The following modules will receive enhancements to the Attachments area for their items.

- RFI
- Submittal
- Action List
- Daily Field Report
- Field Report
- Discussion Forum
- Supplemental Instructions

On top of being able to Link Selected Documents, **Copy Selected Documents** will be a new option. This will copy a replica of that file and upload it into the Attachments area. It is the ideal choice over linking when referring to Document Management files that may be deleted or moved in the future.

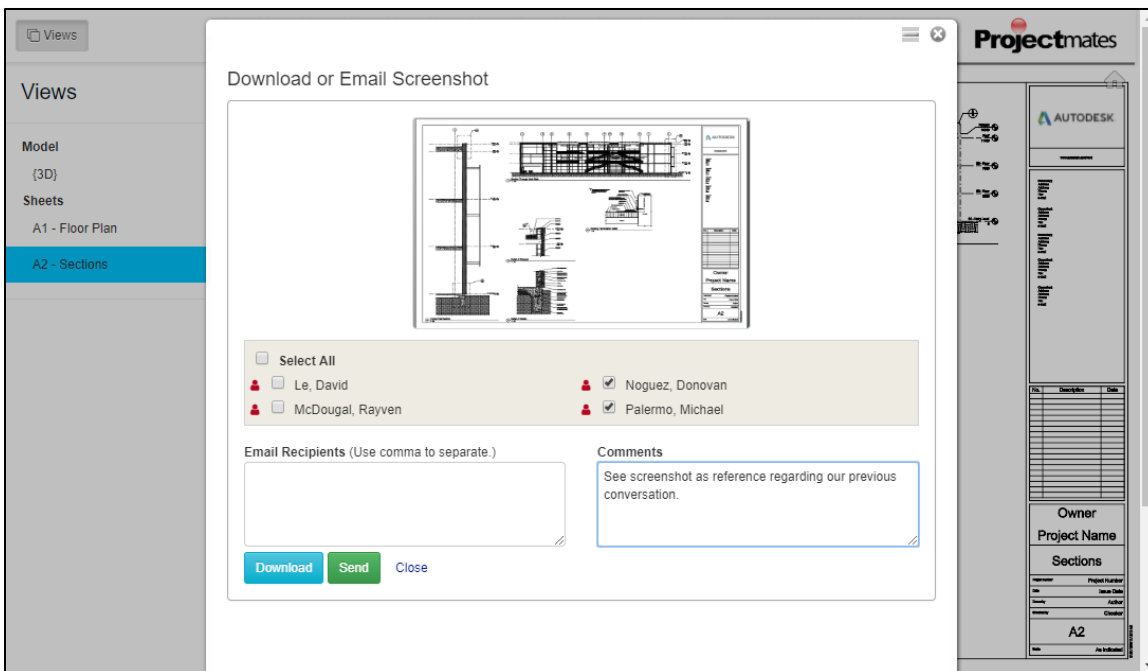
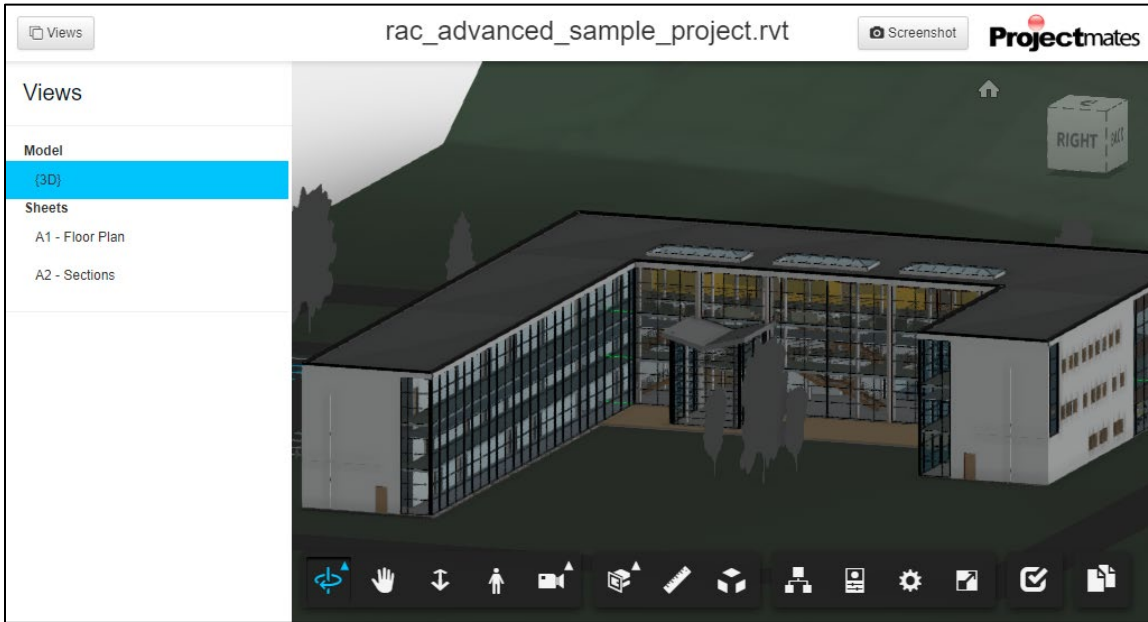


Select Files from Documents Group to Link
 Select Document Group: 
 Filter by File Name:
Link Selected Documents Copy Selected Documents

BIM Viewer Enhancements

Many enhancements have been made to the BIM viewer to improve its overall performance and ease of use. Major new features include:

- The ability to switch between different views, such as linked drawings.
- A screenshot button has been added where you can quickly generate a PNG screenshot of your view, or distribute it to others via email.



For additional information and any inquiries on the cost associated with the File Management tools (PDF, CAD, and BIM Markups) please reach out to info@systemates.com.