GENERAL FAQ

Which Website Should I Visit?

When you first try to access Projectmates, you may not know exactly which web address or URL to use. Let's discuss how to know you are logging into the correct Projectmates site.

1. If you received an email notification that you've been added as a user to Projectmates, locate the email and click the link to access Projectmates.
2. If you cannot locate this email but you know you have login credentials, you can try using a search engine to search for Projectmates and the name of your client.
3. If none of the above gets you to the right page, then reach out to your contact with your client. They should be able to tell you which site to visit.

Helpful Hint: Projectmates web addresses are formatted like https://ClientName.Projectmates.com.

How Do I Access My Account?

Most of our clients have a dedicated website for Projectmates. If you need help determining which website to use to log-in, please review the article titled: What website should I visit?

How Do I Login To Projectmates?

See the following link: Logging In

How Do I Access My Profile?

See the following link: Editing My Profile

How Do I Navigate Through Projectmates?

Once you've logged into your Projectmates system, there will be several areas available to you depending on your role in the system. See the General Navigation help section for more information.

My Projects

Any project you are assigned to will be displayed here. To access a project, simply click on its name. See the My Projects help article for more information.

The Search bar can be used to filter projects based on project number, project name, or any other information columns being displayed. Clicking on a **3-dot** icon to the left of a project will bring up more options to manage the project, depending on your role. The Add to My Favorites **star** icon will shuffle any project to the top for easier access.

My Work

The My Work area contains the Ball-in-Court. This tool can be used to track and interact with tasks assigned to you across all your projects. Click on the upcoming or overdue items to view all of its items in a table. From the table, click on the description of the item to begin working on it. See the My Work help section for more information.

Bids and Plan Room

External users can access bids they've been invited to from here. If you are interested in bidding on a project, click the Add to My Bids button found to its left. To access a bid, simply click on the bid name. See the Bids and Plan Room help section for more information.

My Reports

Users with Reporting rights will have access to this tab. Projectmates Reports are broken into three categories: Pre-Built Reports, Ad-Hoc Reports, and My Dashboard. See the Reporting help section for more information.

Site Admin

Users with Site administrator rights will have access to this area. Site Administrators will be able to manage projects, users and site wide localization and configuration. See the Administering Projectmates help section for more information.

Capital Planning

Users with Capital Planning rights will have access to this tab. Users will be able to see the list of capital planning menus and funding sources. See the Capital Planning help section for more information.

How Do I Get The Projectmates Mobile App?

The Projectmates Mobile app is free to all Projectmates users for websites hosted by Systemates.

Go to the appropriate app store for your device. Click the icon below:

Once the app is installed on your device, enter the website URL that you use to log into Projectmates.

Helpful Hint: If you don't know which website to use, refer to the article How do I access my account?

On the next screen, it will prompt you to enter your username and password. This is the same login credentials you use to log in to Projectmates on your computer or laptop.

What Do I Do If I Am Not Receiving Emails From Projectmates?

If you are having trouble receiving emails from Projectmates, please whitelist these email addresses:

- pm-azure-mail@systemates.com

- pm-azure-mail@projectmates.com

If you are using Mimecast, refer to the following instructions:
Notifications from the Projectmates application are going to be coming from two different potential domains (depending on the message in the server):

- notifications.projectmates.com
- notifications.systemates.com

Below is the SPF record information for these, based off a validation from the following source http://www.kitterman.com/spf/validate.html:

"v=spf1 ip4:168.245.64.104 -all"

canonical name = u6566646.wl147.sendgrid.net

Here are some potential solutions for setting up a bypass policy for emails coming from Projectmates:

Option 1

- Configure Anti-Spoofing SPF Based Bypass Policies for **notification.projectmates.com** and **notifications.systemates.com**
- Visit http://www.kitterman.com/spf/validate.html
- In Domain Name type **notifications.systemates.com** and click **Get SPF Record (if any)**
- Create an SPF record in your Mimecast software as suggested here: https://community.mimecast.com/docs/DOC-1986
- Repeat this process for **notifications.projectmates.com** domain name.

Option 2

- Configure Content Examination Bypass Policies for email address based **pm-azure-mail@systemates.com** and **pm-azure-mail@projectmates.com**

- https://community.mimecast.com/docs/DOC-1394

If you have received email notifications from Projectmates before and are having new issues, please first check with your IT department to determine if your email has blocked or rejected the email. If there is no record of the email coming through, please contact Projectmates Support at support@systemates.com.