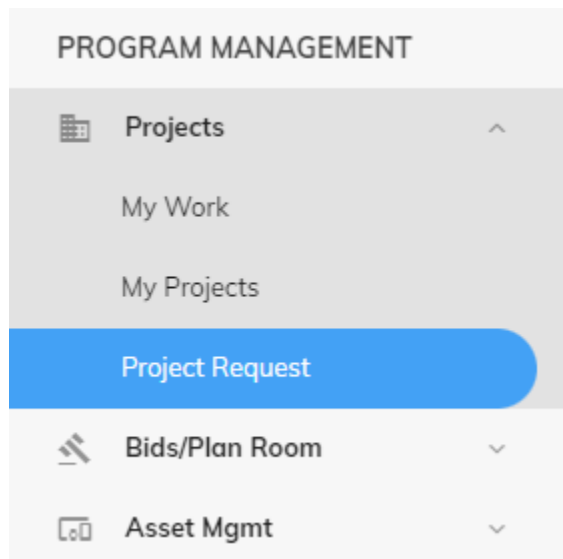


2.5.1 What is the Project Requests Feature?

The Project Requests tool provides a platform for project requests to be submitted, reviewed by your team internally, and even converted into an actual project if approved. The submission of project requests can be limited to internal Projectmates users, or even opened to non-users outside of your organization.

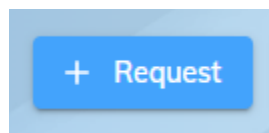
- Intuitive tool for project requests to be submitted and reviewed.
- Seamlessly transition approved project requests into actual projects within the system.

Project Requests is a Program Level tool and can be accessed through the left-side menu under **Projects** > **Project Request**.



2.5.2 Creating a new project request

When inside of the Project Request log, a new request can be created by a user by clicking on the + **Request** button found on the upper right.



Fill out all mandatory fields; some may have already been filled out with information taken from your user account. Fill out any non-mandatory fields to the best of your ability that you find applicable to your request.

Project Request: New

General
Attachments
Approval
Comments
History

Requester Name *
Andrew Austin

Requester Email *
andrew.austin@systemates.com

Requester Title

Requester Phone *
972-222-2967

Requester Cell Phone

Requester Fax

Requester Address *
2435 N Central Expy

Requester Company/Department *
NGB Management Solutions

Respond By
Jul 25, 2024

Project Name *
NGB Building Reno.

Project Number *
AZ0113PV

Address *
2435 N Central Expy

City *
Richardson

State *
TX

Zip *
75080

Country *
USA

Once you have filled in the required fields, you can easily save the current, by clicking the **Save** button in the top right corner. You are also able to click Save & Next to save and continue onto the next tab.

Save

Save & Next

More

Once you've finished filling out your project request, click on the **Approval** tab. From the drop-down menu, select the approval type most relevant to your project request and click **Start Approval**. This will trigger an electronic approval process where your request will be reviewed by other Projectmates team members. You will receive an email notification upon your request being approved, rejected or with instructions on revising & resubmitting.

[← Project Request Log](#)

Project Request: #283

General

Attachments

Approval

Comments

History

 The approval process has not started.

Select Approval Type

Project Request Review - Project Request Workflow

Start Approval

2.5.3 Attaching files to a project request

Supplementary files can be attached to your request by going to the **Attachments** tab. Click the upload box to browse your computer for files to upload or drag files directly into the box.

[← Project Request Log](#)

Project Request: #283

General

Attachments

Approval

Comments

History


Click or Drag Files

[Download All Attachments \(*.zip\)](#)

 Contract fee breakout.pdf 

 24628 Agency Project Request (1).pdf 

Once you have selected the files, click the **Save Files** button in the upper right corner to add the selected files to the request.

Save Files

2.5.4 Approving a project request

Project Requests that are pending your review can be accessed in two areas under **Projects** on the left-side menu.

1. My Work
2. Project Request (your name will be in the Responsibility column next to any requests pending your review)

Navigate to the **Approval** tab of the request. Use the **Thumbs Up** icon to approve the project request, and the **Thumbs Down** icon to reject it. The **Comment** icon will also give you the ability to Approve or Reject the request, whilst providing an additional narrative using the Comment area.

The screenshot shows the 'Approval' tab selected in a navigation bar. Below the bar, there's a status section with 'Approval' and a gear icon, a 'Pending' status with a blue dot, and a due date of 'Jul 23, 2024'. The main area lists a request from 'Steve Tran' with three icons: a green thumbs up, a red thumbs down, and a grey comment bubble. At the bottom, there are three buttons: 'RESET APPROVAL', 'RESET TO DEFAULT APPROVAL', and 'REVISE & RESUBMIT'.

Revise & Resubmit is an alternative to rejecting the request. Clarify what they need to revise in the **Comment** area, then click **Revise & Resubmit**.

This screenshot is identical to the previous one, but the 'REVISE & RESUBMIT' button at the bottom is circled in red to highlight it.

This will notify the submitter by email, undo the approval process, and return the request back into an editable state. The requester can then navigate to their request, revise its contents based on your instructions, and then resubmit it for approval.