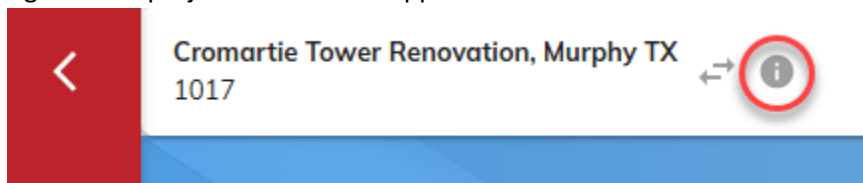


2.7.1 What is the Project Information/Attributes Feature?

Projectmates can be configured to track important project information, including Project Address, Project Manager, Fiscal Year Start, Type, Prototype and more. The Projectmates site administrator can configure the desired fields with a name and specify whether the field is a Text box, drop down, date, currency field and more. This gives you, the customer to really track the important data with the project and report on these key attributes.

2.7.2 Navigating, Updating Project Information Attributes

1. To access Project Information/Attributes, from inside the project. Click the “**i**” icon to the right of the project name in the upper left corner of the screen.



2. The Project Information/Attributes area is broken down by multiple tabs for ease of viewing. The names of these tabs may be different based off the Projectmates customer you are accessing. Click on each of the **tabs** to see the Project Attributes in those tabs.
 - a. General Tab

A screenshot of the 'Edit Project Profile - Cromartie Tower Renovation' form. The form has a blue header bar with a 'Back' button and the title 'Edit Project Profile - Cromartie Tower Renovation'. Below the header is a tabbed interface with tabs for 'General', 'Construction Mgmt', 'Accounting', 'Capital Project Info', 'Construction', 'Project Attributes', 'Property Information', and 'History'. The 'General' tab is selected. The form contains several input fields: 'Project Name' (Cromartie Tower Renovation), 'Project Admin' (Marcus Bliss (Marcus, Inc.) - Construction - Project Manager), 'License Number' (testlicense), 'Number' (1017), 'Project ID' (1926), 'Currency' (United States (\$)), 'Time Zone' ((GMT -6:00) Central Time (US & Canada)), and a toggle for 'Use Daylight Savings Time?'. Below these are fields for 'Address' (140 Westwood Dr), 'City' (Murphy), 'State' (TX), 'Zip' (75094), 'Country' (USA), 'Longitude' (-96.6093139648438), and 'Latitude' (32.999828338623). There is also a link 'Update Longitude and Latitude'.

- b. Accounting Tab

← Back

Edit Project Profile - Cromartie Tower Renovation

General

Construction Mgmt

Accounting

Capital Project Info

Construction

Project Attributes

Property Information

Entity Name

Site ID

Fct

Obj

Sob

Org

FY

PrgDet

Entity ID

Custom Accounting Field 10

Custom Accounting Field 11

Custom Accounting Field 12

Custom Accounting Field 13

Custom Accounting Field 14

Custom Accounting Field 15

Custom Accounting Field 16

Custom Accounting Field 17

c. Construction Mgmt Tab

Back

Edit Project Profile - Cromartie Tower Renovation

General
Construction Mgmt
Accounting
Capital Project Info
Construction
Project Attributes
Property Information

Contract Number

Amendment #

Orig. Start
Jan 01, 2001

Owner Substantial Completion Date
Apr 30, 2021

Actual Completion

☐ Advance DOP Notice

Owner Contract Amount
3,136,500.00

Spent-To-Date
135,000.00

Owner Name

Owner's Rep
--Please Select--

Prime A/E

Prime A/E Rep
--Please Select--

Prime Contractor

Prime Contractor Rep
--Please Select--

- To update project information or attributes, simply click in one of the cells and update the desired information. Click save in the upper right corner to save the changes.



Please note: You will need appropriate access rights to edit information. Users without edit access rights will only have read only access to the project attributes.

2.7.3 Changing the Primary Project Administrator

- As a site administrator or primary Admin, to change the primary project administrator from the project information/attributes screen, select the new Project Admin from the drop-down list of available users.

← Back

Edit Project Profile - Cromartie Tower Renovation

General Construction Mgmt Accounting Capital Project Info Construction Project Attributes Property Information History

Project Name * Cromartie Tower Renovation

Project Admin * Marcus Bliss (Marcus, Inc.) - Construction - Project Manager

License Number * testlicense

Number 1017

Time Zone * (GMT -6:00) Central Time (US & Ca

Address * 140 Westwood Dr

State *

--Please Select--

- Mario Abril (Systemates) - Temp Role
- Marcus Bliss (Marcus, Inc.) - Construction - Project Manager
- Heather Cline (Systemates) - Temp Role
- David Le (Systemates) - Construction - Director
- Roopali Naik (Systemates (Sys)) - System Admin
- Donovan Noguez (Systemates) - Construction - Project Manager
- Blaine Owens (Systemates) - Construction - Project Manager
- Sharon Peterson (Systemates Inc) - Construction - Project Manager
- Nici Putter (Systemates) - Construction - Project Manager
- Brittany Riland (Systemates Inc) - Construction - Director
- Brittany Riland (Systemates Inc) - Construction - Director

2. Click the **save** button in the upper right corner to update the changes.

