Management Portal

The Management Portal is a desktop application used for administration purposes in Projector. It is typically used by admins, finance managers, project managers, and resource schedulers. This page contains links to all the Management Portal help pages. Each help page details what a feature is used for, why you would use it, and how to access it. The information in these pages is at a granular level, explaining Projector on a screen-by-screen basis. If you are looking for a higher level introduction to features of Projector, then you may be interested in visiting our How To Guide.

To start using the Management Portal, please visit our Install Management Portal for Windows or Install Management Portal for macOS help pages.

F1 Key

You can press the F1 key on any Management Portal screen to jump to a help page dedicated to it.

Contents

Browse the Management Portal help guide.

        - Location and Holiday Editor — manage the locations of your own company's facilities and resources in addition to the locations of your clients and projects
    - Rate Management Heading — Create and maintain Departments and Titles, Rate Cards and Resource Direct Cost Cards
        - Department and Title Editor — manage departments and titles which are used to categorize resources for billing, compensation, scheduling, and reporting
        - Standard Rate Type Editor — manage your default rate types for work performed, like overtime rates
        - Rate Card Editor — manage your resource's billing rates
        - Resource Direct Costs Rate Card Editor — manage your resource's loaded cost rates
    - Users & Resources Heading — create and maintain User and Resource profiles, create and maintain User Roles assignable to Users
        - User Types Editor — define access rules, permissions, and notifications to groups of users
            - User Types Editor - General Tab
            - User Types Editor - Global Permissions Tab
            - User Types Editor - Cost Center Permissions Tab
            - User Types Editor - Notifications Tab
            - User Types Editor - Assigned Users Tab — manager users assigned this user type
            - User Types Editor - Dashboards Tab
        - Resource Types Editor — classify your resources by type and specify default settings on them
        - User Editor — manage who can log into Projector, passwords, contact details, and permissions
            - Client Users — configure client users for time approval, emails, and project workspaces
            - Installation Owner — your main administrative contact
            - Proxy Users — test permissions and cover for out-of-office users
            - User Editor - Contact Information
            - User Editor - General Information
            - User Editor - Overrides Tab
            - User Editor - User Types — learn about user types and how to apply tehm
        - Resource Editor — manage people who report time, report expenses, or are scheduled on projects
            - Resource Info Tab — create a new history row for the resource or modify basic information like email address or name
            - Resource Skills Tab — define areas of expertise for a resource
            - Resource User Defined Fields Tab — set values for your resource UDFs
            - Resource Scheduled Time Off Tab — schedule common reasons to be out of work like vacation, jury duty, or a personal day
            - Resource History Tab — view and edit the history for a resource
            - Resource Resumes — upload files that are relevant to a resource like credentials, resume, or photo
        - Role Types Editor — create, edit, and delete role types
    - Job Accounting Heading — Create and maintain items used within Projector like engagement types, expense types, vendors, accounting periods and more
        - Standard Task Types Editor — categorize time by high level type
        - Contract Types Editor
        - Engagement Type Editor — Engagement Types have three functions. They are used to prepopulate settings for new engagements and projects, to group like engagements together for reporting purposes, and to properly route accounting transactions.
            - Engagement Type - General Tab — defines several engagement type attributes and specifies default settings
            - Engagement Type - Budgets Tab — determines the default budget types for new projects
            - Engagement Type - Accounting Tab — map accounting transactions
            - Engagement Type - Task Types Tab — specifies the default task types for new projects
            - Engagement Type - Project Workspaces Tab — configure information in and access to project workspaces
            - Engagement Type - Enterprise Configuration Tab — configure which stages, task types, rate types, and UDFs are available to an engagement
        - Time Off Reason Editor — manage the reasons you allow resources to take time off
        - Vendor Editor — manage organizations or people that you need to reimburse like vendors and resources
        - Expense Type Groups — categorize cost cards by high level group
        - Expense Type Editor — categorize your expenses and define expense attributes
        - Expense Type Configurations Editor
        - Billing Cycle Editor — define your billing cycles like weekly, monthly, or quarterly
        - Adjustment Code Editor — define reasons why a time or cost card was adjusted
        - Payment Terms Editor — define payment terms for invoices
        - Accounting Period Editor — define date ranges that control when time and expense entry/adjustments are allowed as well as group accounting transactions
        - Tax Type Editor — define sales taxes, what they apply to, and how they should be mapped in your accounting package
- Engagements and Projects — learn about engagements and the projects that they are made up of
    - Project Browser — browse for projects, clone projects, perform pre-invoicing adjustments, and perform revenue recognition
        - Clone Project Form — simplify the task of creating projects and engagements by basing them upon existing ones
        - Copy from Project Form — copy project configuration data from a target project into the current project
        - Pre-Invoicing Adjustments Form — modify time and cost cards that have already been approved
        - Revenue Recognition Wizard — allocate earned revenue on fixed price projects
        - Engagement Close Wizard — identify outstanding items prior to closing an engagement
    - Project Dashboard — Measure the performance of projects against budgets and KPIs
    - Engagement Info Tab — specify general information about a contract
    - Engagement User Defined Fields Tab — set custom values determined by your organization
    - Engagement Billing Tab — change how this engagement is invoiced
    - Engagement Contract Tab — specify contract terms and milestones
        - Create Recurring Revenue or Milestone Schedule — create many service periods or milestones at once
        - Service Contracts Setup — instructions to set up a service contract
    - Engagement Invoice Summary Tab — view a summary of issued invoices, draft invoices, and unbilled items
    - Engagement Budget Tab — define your time and cost budget metrics and amounts
    - Engagement Projects Tab — view high level project details and create new projects under this engagement
    - Project Info Tab — manage general project information, project managers, time/expense entry, and time/expense approval settings
    - Project User Defined Fields Tab — view and modify project UDFs
    - Project Rates Tab — specify engagement currency, project contract/billing rates, and project rate types

        - Project Roles Tab — manage who is working on a project
        - Project Task Types Tab — specify the tasks on a project and how they map to client billing rates
        - Project Task Planning Tab — create Gantt chart task plans, visualize performance to your task plan, and schedule resources according to your task plan
            - Task Plan Tab — manage a detailed task plan by specifying effort, duration, and assigned resources
            - Task Status Tab — visualize your project's performance to schedule and performance to budget
            - Resource Plan Tab — convert your task plan into scheduled resources or view how your plan matches your available resources
            - Task Details Form — view detailed analysis of individual tasks and make fine-grained changes to tasks
            - Microsoft Project Import and Export — transfer data between MS Project and Projector
            - Task Reassignment Form — swap out resources on a task plan
        - Project Cost Planning Tab — plan out the costs of your project
        - Project Resource Scheduling Tab — request resources, book resources, and view to-date information like billing revenue and resource direct cost
        - Project Budget Tab — define time and expense budgets for a project based on a number of different metrics
            - Baseline Browser — view your current and past time, cost, and task plan baselines
            - Create a Cost Baseline — define a new cost budget
            - Create a Time Baseline — define a new time budget
            - Create a Task Plan Baseline — take a snapshot of your task plan performance
        - Project Workspace Tab — manage settings and access to web based project management tools
        - Project Notes Tab — communicate with your team members about a project
        - Project Advanced Setup Tab — map profit and loss to specific cost centers
    - Roles MP — learn what a role is and how to create a role
        - Role Browser — view demand for labor across your projects
        - Role Editor — view individual roles to manage hours, manage rate overrides, and view history
            - Role Info Tab — set role description, start/end dates, and open request flag
            - Role Hours Tab — edit requested hours, edit booked hours, view hours variance, and view hour breakdowns for analysis
            - Role Graph Tab — visualize requested hours, booked hours, and resource workload
            - Role Requested Resource Tab — request specific people or request people based on specific criteria to fulfill this role
            - Role Booked Resource Tab — select which resource should fulfill this role
            - Role Rates Tab — view default rate and override billing rate or internal rates
            - Role Notes Tab — communicate about this role with other project managers and schedulers
            - Role History Tab — view historical changes in requested hours, booked hours, and assigned resources
    - Scheduling Tools — learn about scheduling your resources
        - Resource Info Form — view detailed data about a resource, all in one place
        - Resource Browser — view your supply of labor
        - Resourcing Dashboard — check resource availability, book resource requests, and assign users to unnamed roles
        - Advance or Delay Schedule — advance or delay roles, groups of roles or your entire schedule
    - Time Management MP — review, view history, and change status of time cards
        - Time Approval Tab — approve or reject time submitted by resources
            - Time Approval Form
        - Time Browser — find specific time cards and change their status
        - Time Card History Viewer — display a chronological list of adjustments made to an individual time card
    - Expense Management MP — review, view history, and edit cost cards
        - Expense Browser — search for cost cards and find the expense documents they are on
        - Expense Documents MP — group of expenses for a single resource, vendor, subcontractor, or soft costs
            - Expense Reports MP — resources track their company expenses for reimbursement and invoicing
            - Vendor Invoices MP — track invoices submitted to you from your vendors
            - Subcontractor Invoices MP — bill time for your subcontractors
            - Soft Costs MP — a versatile tool for tracking expenses when other types don't apply
        - Expense Document Editor — edit expense document details, edit cost cards on this documents, and approve cost cards
            - Cost Card Details Editor — edit cost card details
            - Cost Card History — view history of cost card submission, approval, addition to invoices, addition to payment vouchers
        - Payment Voucher Browser — manage payment vouchers
            - Vendor Reconciliation MP — reconcile outstanding payment requests with unapproved expenses
        - Value Added Tax (VAT) — introduction to VAT
            - VAT for Expenses — track VAT paid out and set default VAT percentages
            - VAT for Invoicing — how to collect VAT
    - Invoicing — gathers together your time, expenses and milestones onto an invoice
        - Invoice Browser — browse for existing invoices, create new invoices, or issue, void, delete, mark as paid or post an invoice to the web.
        - Create New Invoices Form — create new invoices for outstanding time cards, cost cards, and milestones
        - Create Blank Invoices or Credit Memos Form — Creates a draft invoice that contains no time, expenses or milestones.
        - Invoice Editor MP — Edit, adjust, preview, approve and issue invoices
            - Invoice Editor MP - Invoice Tab — enter billing data, view a summary of billable items, manage approvals and set your template
            - Invoice Editor MP - Time Card Review Tab — lists all the time cards currently included on the invoice. It displays the net effect of all adjustments, access to the history of time cards, and provides powerful tools to revalue, adjust, transfer, add, exclude and split time cards
            - Invoice Editor MP - Cost Card Review Tab — lists all the cost cards currently included on the invoice. It displays the net effect of all adjustments, access to the history of cost cards, and provides powerful tools to adjust, transfer, add, and exclude cost cards
            - Invoice Editor MP - Milestones Tab — Add, delete, edit, include or exclude milestones for each engagement on this invoice.
            - Invoice Editor MP - Adjustment Summary Tab — review and approve adjustments on an invoice
            - Invoice Editor MP - Notes Tab — provides an area where you may make notes about the invoice
            - Invoice Editor MP - Distribution Tab
        - Issue Invoice Form — make final modifications to the invoice number or date, post an invoice to the web, open for viewing, or save to disk
        - Time Card Adjustment Detail Form — see a detailed view of a single adjustment
        - Cost Card Adjustment Detail Form — view details about the net effects of a single adjustment
    - Client Browser — manage clients that you do business with
        - Client Editor — manage rates, billing information, and invoicing settings

- Integration Tab — manage accounting transactions, sync data with accounting packages, and sync data with Salesforce
    - Export Heading — this area of Projector is no longer in use
        - Export Time Cards
        - Export Cost Cards
        - Export Timeoff Cards
        - Export Resource List
        - Export Project List
    - Accounting Systems
        - Dynamics GP — push AR, AP, and GL transactions into Dynamics GP
        - Intacct — sync Projector with Intacct
        - QuickBooks — synchronize AR, AP, GL, Clients, and Vendors with QuickBooks
            - QuickBooks Synchronize Wizard — instructions for transmitting data from Projector QuickBooks
            - Connect to QuickBooks Desktop Edition — step by step guide to connect Projector with QuickBooks Desktop Edition
            - Connect to QuickBooks Online Edition — how to configure QuickBooks Online Edition to work with Projector
    - Advanced Analytics/BI
        - Projector BI — view your ProjectorBI settings
        - MS Power BI — configure your PowerBI application ID
            - Power BI Dashboard Configuration — learn how to display PowerBI dashboards in Projector
    - CRM Systems
        - Salesforce — view results of Salesforce data imports, review failed import transactions, kick off a manual import or set your access credentials
            - Salesforce.com Evaluation Configuration
    - Single Sign On (SSO) Implementation Guide — use one set of credentials to sign into many websites
        - Single Sign On (SSO) for ADFS
        - Single Sign On (SSO) for Okta
        - Single Sign On (SSO) for OneLogin
        - Single Sign On (SSO) Troubleshooting
        - Single Sign On (SSO) User Guide — SSO for end users
        - Single Sign On Error Messages
    - Transactions — view detailed information about AR, AP, and GL transactions that will be sent to your accounting package
        - AP Transactions
        - AR Transactions
        - GL Transactions — view transaction history, override account mappings, force transactions into different periods, or change the status of transactions
        - Integration Overrides
- Reports MP — your starting point for creating, editing, running, and viewing reports
- Search MP — syntax for searching in Management Portal