

# 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.

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  - [Tab Groups and Tab Management](#) — open, close, rearrange, and grouping tabs
  - [Calendar](#) — how to use the Projector's Calendar control
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  - [General Permissions](#) — manage an assortment of permissions
  - [Global Permissions](#) — manage high level permissions
  - [Cost Center Permissions](#) — define user permissions based on cost center structure
  - [Notifications](#) — manage who receives high level email notifications
- [Home Tab](#) — quickly jump to product areas and view alerts
- [Administration Tab](#) — manage installation wide settings, company structure, rates, users, and categories for record keeping
  - [Setup Heading](#) — Myriad of installation settings relating to time and expense entry, invoicing, document management, user-defined fields, currencies and exchange rates, budget alerts, skills, engagement and project stages and more.
    - [Modules Editor](#) — enable or disable major functional areas of the Projector software. You may also view your Projector invoice and billing history.
    - [System Settings Editor](#) — configure core installation settings
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      - [System Settings Editor Project Management Tab](#) — specify detailed task management parameters
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      - [System Settings Editor Reporting Tab](#) — configure your revenue recognition method, RDC basis, and utilization metric
      - [System Settings Editor Document Management Tab](#) — configure the storage thresholds for your overall installation, workspaces, and document size in Projector. Use archives to download or remove your data.
      - [Document Archives](#) — backup or delete files stored in Projector
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      - [Engagement Stage Editor](#) — model your engagement lifecycle through control of permissions, notifications, permissible edits
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    - [Scheduled Hours Color Map Editor](#) — color code scheduled hours according to their engagement type or stage
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      - [Generic External Connector](#)
      - [Generic SOAP External Connector](#) — import time cards and create relationship UDFs from a third party system
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    - [Company Editor](#) — manage entities with distinct GL accounts, different currencies, and default taxes
    - [Cost Center Editor](#) — model your organization's structure as a multi-tiered hierarchy

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- [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
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    - [User Types Editor - Global Permissions Tab](#)
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    - [Client Users](#) — configure client users for time approval, emails, and project workspaces
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    - [Resource Skills Tab](#) — define areas of expertise for a resource
    - [Resource User Defined Fields Tab](#) — set values for your resource UDFs
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    - [Resource History Tab](#) — view and edit the history for a resource
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  - [Standard Task Types Editor](#) — categorize time by high level type
  - [Contract Types Editor](#)
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    - [Engagement Type - General Tab](#) — defines several engagement type attributes and specifies default settings
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  - [Tax Type Editor](#) — define sales taxes, what they apply to, and how they should be mapped in your accounting package
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  - [Engagement Budget Tab](#) — define your time and cost budget metrics and amounts
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  - [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
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    - [Role Graph Tab](#) — visualize requested hours, booked hours, and resource workload
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      - [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
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  - [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](#)
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    - [Single Sign On \(SSO\) for OneLogin](#)
    - [Single Sign On \(SSO\) Troubleshooting](#)
    - [Single Sign On \(SSO\) User Guide](#) — SSO for end users
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