

# PROADVISOR review

## *Projector Professional Services Automation*

Overall Rating **8.42**

### Product Name

Projector by Projector  
PSA, Inc.

### Reviewed By



### Pro-Advisor Name

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### Date Reviewed

July 25, 2007

### Summary

Projector is a web-hosted, integrated professional service automation solution. It helps management focus on scheduling and project management in a service environment. It is a great design and if you are in the business of making money providing professional services, you should check this out. I think its benefits are greater for companies with more than a dozen resources (timekeepers) to schedule.

### Strengths

I was impressed with the logical organization and design of this product as well as its feature set and ease-of-use. Projector stands out in the following areas:

- 1) Resource scheduling: In a service business you must be focused on resource utilization that is, keeping people chargeable. This software tracks the information that is key to service profitability,
- 2) The project dashboard: This helps management focus on key performance indicators for each job in progress and to monitor over/under budget status.
- 3) The project workspace: This is a page on the web that helps project members coordinate their activities regardless of where they are located.
- 4) The workflow features: Automatic routing of invoices and time sheets for approval facilitates the time and billing process, especially for a geographically dispersed organization.

### Limitations

The product does not currently pass time data to QuickBooks to prepare payroll. There are currently no automated scheduling routines. Instead, the software provides a "workbench" of visual and quantitative tools for the resource manager to assign resources to projects at a macro and micro level, but there is nothing automatic per se about that process.

There are currently no subtasks in the project structure. There are customers, engagements, projects and tasks, but I think task groups or sub-tasks at the engagement level would be very useful. Task/subtask capability is planned for the next release (4.0).

Reporting is slower than on a typical stand alone QuickBooks installation.

Product Ratings	Rating	Ratings Definitions
<p><b>Setup and Installation:</b></p> <p>Because this application is web-based, the initial installation is easy. There is a program called the Management Portal that is actually downloaded and installed on your machine. There are many configuration decisions that must be made when setting up the database and numerous user defined fields at the client, engagement, project, and resource levels. The user must also configure titles, rates, locations, holidays, cost centers, resources, resumes and tasks. This is not a trivial process, and reflects the complexity and rich functionality of the system. This data is required to produce the information that makes the product valuable.</p>	8.0	<p><b>10.0 (Perfect):</b> This exceedingly rare score is reserved for a product that is as perfect as it could be.</p> <p><b>9.0 to 9.9 (Spectacular):</b> A product that receives a rating in this range succeeds at meeting all of its intended users' needs and has no meaningful drawbacks.</p> <p><b>8.0 to 8.9 (Excellent):</b> A product that receives a rating in this range is superior in so many ways that its relatively few drawbacks are not very important.</p>
<p><b>Interface:</b></p> <p>The product has two separate interfaces: the Employee Portal and the Management Portal. The Employee Portal is entirely web-based, the Management Portal has software that you download and install. Since the product is web-based you do feel some delay in the employee portal, but the management portion of the software is really quite responsive. Reporting is also slow. Information is not displayed on a screen until a query is executed. I found this confusing at first but it is logical that it works this way because of the online nature of the product and I quickly found that this was not a problem.</p> <p>There is help throughout the software although it is sometimes slow. Often just moving your mouse over a field yields additional information even without clicking and it does this very quickly.</p> <p>Once you understand the query interface, the software is really quite intuitive to operate with the exception of perhaps writing custom reports.</p>	8.0	<p><b>7.0 to 7.9 (Very good):</b> While the strengths of a product scoring in this range certainly outweigh its weaknesses, it has some minor faults that certain users should be aware of.</p> <p><b>6.0 to 6.9 (Good):</b> This range represents a product that is above average. Its strengths slightly outweigh its weaknesses, making it good for most uses but not a standout.</p> <p><b>5.0 to 5.9 (Average):</b> A product that scores in this range is functional but unremarkable.</p> <p><b>4.0 to 4.9 (Mediocre):</b> Products in this range are below average. They fall in the middle of the pack for most features, but suffer from a few additional major flaws.</p>
<p><b>Features:</b></p> <p>This is not plug-and-play software and will require some planning and implementation to take advantage of its many features. The user can attend a demo of the software and get their own user account and then try it free for 30 days. I recommend anyone considering this software do a trial run. This is a good time to test the functionality of the software against your information requirements. You configure it to work the way you want and, if you like it, you just keep your configuration and start using the software as your production database.</p> <p>I feel this product stands out in the following areas:</p> <ol style="list-style-type: none"> <li>1) Resource scheduling abilities: In a service oriented business you must be focused on keeping people chargeable. This software tracks the information that is key to service profitability.</li> <li>2) The project dashboard: Helps you focus on key performance indicators.</li> <li>3) The project workspace area: Helps project members coordinate their activities regardless of where they are located.</li> </ol>	9.0	<p><b>3.0 to 3.9 (Poor):</b> A customer should probably not consider purchasing a product in this range or lower. There may be one or two specialized circumstances, however, that could justify the purchase of this product for a very low price for a specific demand.</p> <p><b>2.0 to 2.9 (Terrible):</b> A product that receives a rating in this range does not satisfy any of its intended users' needs and has no meaningful strengths.</p> <p><b>1.0 to 1.9 (Abysmal):</b> A product in this range should never have been produced. This product has no redeeming qualities and worse, may actually harm the user or the user's productivity.</p>



- 4) The workflow features: Facilitate time and expense data collection and approval as well as invoice generation and submission to the customer.
- 5) Contract profiles: You can extract contract delivery arrangements to set up milestones for billing.
- 6) There are multi-currency capabilities.
- 7) A skills database: This is used to match resources to jobs.
- 8) Automatic e-mail notification: This is used to notify personnel when they have been assigned to a project.
- 9) The ability to restrict posting to only open accounting periods.
- 10) The ability to do revenue forecasts with probabilities.
- 11) Reports are first sent to Excel and then can be printed from there. This is sometimes a nice feature and sometimes just slows up the printing process. The reports are not always paginated and ready for printing. This requires some manipulation by the user.

### Ease of Use/Service and Support

8.50

When I evaluate software for ease of use I am interested in how much I can do before I have to call someone for help. This software is well-organized and flexible with a lot of functionality but it is not difficult to learn to use. There are excellent context sensitive help resources that pop-up with the F-1 key.

For me, the custom report writer was powerful but not very easy to use. The offset to this is that most reports are generated to Excel where you can do further customization.

### Data Security / Privacy

9.0

This is a web-based application, so all of your data is stored at a secure data center. In most cases that is probably more secure than it is on your PC given the poor security and backup habits of many smaller businesses. You connect to this application through a secure (https) connection.

### Integration with QuickBooks

8.0

Projector is designed to be a multi-currency, multi-company job accounting sub-ledger. It interfaces on a batch basis with QuickBooks or QuickBooks online. QuickBooks handles the general ledger, accounts payable, and accounts receivable functions. Project level details are not posted to QuickBooks but their G/L effect is summarized in QuickBooks. Information required to pay bills and bill customers is also passed to QuickBooks. Clients and resources added in Projector can become customers:projects and employees in QuickBooks. Customers, Employees and Vendors in QuickBooks can become resources or customers in projector. These are all batch synchronizations, they are not real-time. The user is given the option to synchronize or not for each item presented.



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There is a manual that describes the accounting implications of various transactions in Projector and how they will affect the QuickBooks ledger. This is a complex interface, and will require some planning and thought to implement. This is an excellent opportunity for Pro-Advisors with an accounting background to assist with the implementation of this interface.

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