10 TopTen REVIEWS

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Web Services » Business & Finance » Online Project Management Review » Project Insight

Project Insight

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PROJECT insight
Project & Portfolio Management Software

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Pros
This online ⬀ project management service provides full mobile access, supports traditional and proprietary methodologies, is Microsoft certified and includes free training. It is compatible with Sage accounting software ⬀ as well as CRM and ERP solutions. Metafuse continually adds new functionalities to improve ease of use, mobility and visibility.

Cons
Project Insight accounts do not include free access accounts for shareholders; however, project requests can be managed using custom forms. In addition, you can turn generic member accounts off and on to accommodate externals or clients on specific projects.

The Verdict: 9.13/10
If your team is mobile ⬀, utilizes tablets or is geographically disbursed, Project Insight is ideal. The entire interface utilizes HTML5 coding technology ⬀ to accommodate all mobile devices, and you can translate the interface into any language. Project Insight provides intelligent scheduling, supports cross-project resource allocation, provides preconfigured and configurable reporting options and automated prioritizing.

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Genius project	2	Genius Project
AtTask	3	AtTask
PROJECT insight	4	Project Insight
PROJECT MANAGER	5	ProjectManager

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10 TOP TEN REVIEWS

Project Insight is entirely accessible via a mobile device, making it ideal for mobile teams. Most online project management software provides mobile apps for some functions; however, the Project Insight interface was rolled out using HTML5 coding technology to be compatible with all mobile devices, including iPads and tablets. Project insight includes excellent tools for managing resources, expenses, documents, templates and budgets.

The newest version includes numerous convenience features, including secure, single sign-ons. You can also now add your own icons, change font sizes and add languages to the interface. Metafuse, Inc., the provider of Project Insight, also added improved capacity planning, with capacity charts included in the dashboard. Soon the company will release a brand-new workflow wizard that can help you rapidly create workflow processes.

This cloud project management software is entirely hosted on Metafuse's own Level 3 data center, which relieves your IT team from any hardware or software maintenance. However, Project Insight can also be hosted using a data center of your preference, or onsite if needed for security reasons. The hosted version requires a monthly fee but includes maintenance. If you host your own solution, a service contract is required for assistance.

Project Management Tools: 10/10

AdChoices ▷

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Clarizen	Genius Project	AtTask	Project Insight	ProjectManager	Daptiv PPM	Tenrox	Celoxis	LiquidPlanner	EPM Live
clarizen	Genius project	AtTask	PROJECT Insight	PROJECT MANAGER.com	daptiv	Tenrox	CELOXIS	LiquidPlanner	EPMLive
10	10	9.4	10	8.8	10	10	8.8	8.8	8.8

Project Insight (PI) was developed with Project Management Institute (PMI) and project management body of knowledge (PMBOK) methodologies in mind. It can handle traditional PM ideologies and processes, as well as customized processes. In terms of project management tools, Metafuse has omitted nothing; Project Insight continues to evolve as new technologies and practices emerge. PI can manage all project management tasks, including scheduling, issue and request management, budgeting, risks, reporting, approvals, calendars, permissions and portfolio management. Project managers can learn how to maximize the use of PI by taking advantage of more than 150 hours of product and project management training and 12 live webinars per month.

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Customizable dashboards give project managers a quick view of project summaries and access to more than 100 reports. Common tasks such as creating projects, milestones and tasks can be initiated from the dashboard. Interactive Gantt charts can help managers edit tasks, view attachments, move resources, alter timeframes, compare baselines and manage alerts. Gantt charts can be altered using drag-and-drop functions or right-click options. Change alerts can be sent out immediately once a change is finalized.

Issue tracking tools include issue details, severity ratings, project assignments, found date and found by information, attachments, links, approvals and customs fields. Issue resolutions can easily be assigned, and issues can be created from an Outlook email message. Project requests can be submitted by clients, or an Outlook email can be converted into a request. Project request forms include fields for priority, scope, estimated effort, risks and more. PI can also create any type of custom form. Custom forms can help you collect data such as client experience polls, vacation requests and security pass requests. The software can also create and share HTML pages, and audio and video streams.

Resource Management: 10/10

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Project Insight provides a full resource management suite including complex capacity planning. It can manage complex timesheets, expenses, a variety of time billing and allocate resources. PI can handle the needs of mid-market, large teams with the help of complex resource filters, resource import tools, mass assign capabilities and group management tools. Complex resources can prove quite helpful when working with large teams. PI can filter resources by preset criteria or custom fields. You can search for resources by department, skill set, resource type, work hours scheduled, percent of workday allocated and any other custom fields such as education level, experience level or location.

This PM service can manage all types of resources, including generic, external and internal resources. However, only paid accounts can submit time and expenses and so on. If you are managing a pool of freelancers or consultants, you can activate/inactivate user accounts as needed. PI can balance workloads, split tasks, account for non-working time, manage department resource loads and provide reporting/accounting data. It includes a searchable resource directory that can be sorted and filtered.

Two powerful tools that are unique to Project Insight are prioritized scheduling and project prioritization. Using these tools, you create customizable scorecards in which you define goals, critical success factors and key performance indicators. Each of these items can be rated and weighted based on your preferences. Once this is all set up, Project Insight can prioritize your projects based on your preferences. This is a powerful tool when it comes to discovering the best new projects for your team as well as the most critical projects for your team to work on immediately. This data, combined with the Intelligent Scheduling tools, takes a lot of stress

away from project managers and helps them make smart choices when managing their project portfolios and resources.

Collaboration: 8.8/10

Compare ⌄

Project Insight has tools for keeping project managers, executives, team members and clients in the loop. This service's fees are based on the number of active users, which also includes client accounts. However, you do not have to add a subscription every time you add new clients. You can turn members' accounts on and off, and you only pay for the number of active users. The company offers discounts for every group of 10 users. If you start out with 20 workgroup accounts, for example, you will receive two discount levels; once you get up to 30 workgroup users, you will eligible for another discount level.

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This PM service provides a variety of account types. Project managers can set specific permission levels and create unique dashboards. Team members can communicate in a variety of ways, such as by leaving notes assigned to a file, project or folder. Managers can also view version histories and manage approvals. Through their portals, members can view tasks, projects, issues and to-do lists. Members can even assign issues to each other and share reports. The newest release includes social-media type comment streams and alerts.

Increasingly, clients are requesting access to PM tools, and potential clients are asking for quantifiable proof that a team can handle their projects. Using Project Insight, you can create customized client portals with your own branding. Through the client portals, clients and potential clients can view reports, project statuses, schedules, issues, tasks and more, depending on the permission level you set. Being able to show a potential client exactly how your team can handle a project with accurate completion dates and budgets can certainly provide a competitive edge when you are trying to obtain a contract.

To help global team members collaborate on projects, the interface is available in Spanish, Korean and English – and you can import another language and alter the interface to any language. The software also includes cultural settings, and you can change the currency defaults.

Ease of Use: 7.5/10

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Project Insight was created using PMI project management standards and includes tools familiar to experienced, formally trained project managers. However, the company has also noted that about half of the people using project management tools are not formally trained project managers, so it provides extensive training opportunities to help you learn how to use the system, as well as to provide information on project management in general. In fact, the company even offers methodology classes and value based project management (VBPM) Wisdom Workshops.

This PM service is highly customizable and can be configured to run exactly how you want it to run, which comes with a bit of a learning curve. For the most part, team member and client dashboards are simple to manage, but project managers will benefit from taking advantage of the training and tips PI offers to help them create a tailored solution that fits their business. Development teams can also consult with Metafuse to help them create necessary integrations. IT teams can also acquire assistance with deploying installed versions.

In terms of shortcuts and other convenience features, Project Insight is well equipped. It is has drag-and-drop tools, right-click options, project cloning, import tools, global searches, alerts and notifications, customizable dashboards, snapshot reports and much more. It even has tools for dealing with team members or clients who are particularly resistant to learning new technologies. For example, if you have clients or team members who are stubbornly tied to email as their way of communicating even small details, you can save those emails to a project for them or create tasks and issues for them without requiring them to learn how to use PI.

Integration & Professional Services: 7.5/10

Compare ⌄

Project Insight was developed by Metafuse, which is a Microsoft Certified Partner. This PM tool works directly with Outlook, Microsoft Office, Sage CRM, SharePoint, Microsoft Dynamics (GP and SL) and more. Metafuse has also created integrations for other accounting software, including Sage and QuickBooks. It can also import and export projects to Microsoft Project. The service is Mac and PC compatible, is AJAX enabled, runs on the .NET platform, utilizes Silverlight and provides team members with mobile phone tools.

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Since it is a web-based project management solution, PI does not require a client-side download except for the Outlook Connector. For customized integration, Metafuse provides application programming interfaces (APIs) and software development kits (SDKs) for the installed version. If you do not have the time or the development team to create customized integrations, Metafuse provides professional development services to create the needed integrations for you. They also provide migration services if you need to move your data from Basecamp to Project Insight.

The Outlook Connector is a handy, timesaving tool. It can synchronize tasks between Project Insight and Outlook as well as manage time entries and percentages complete. One feature we found particularly useful is the ability to upload Outlook emails to Project Insight. Using this feature, you can save all related emails to a specific file within the project so that you will never lose an email again, and all team members can access

that communication if needed. You can also create tasks and issues directly from Outlook based on a specific email. For example, if your client emails you regarding a specific change, you can create a task or issue from that email and save the associated email text with the new task or issue.

The latest version of Project Insight utilizes HTML5 markup language for compatibility across a range of devices. Rather than create specific apps for devices, Metafuse decided to utilize cross-compatible technologies so that mobile team members can view tasks, submit time and expenses, and view alerts regardless of whether they use an iPad, iPhone, Android phone or other type of smartphone or tablet. Of course, they can also log in to their Outlook account via a mobile device and view their task assignments there as well. You can even use the Project Insight mobile PM tools' contact list to directly call team members from the app using your mobile phone.

Project Insight provides extensive training, including free training for team members. Training includes webinars, videos, one-on-one team training, business-process training and methodology training. The support teams also provide implementation support, help with creating custom integrations and on-site training, if needed.

Summary:

Metafuse is one of the first software companies that recognized the need and demand for client collaboration tools. It continues to identify market needs and implement new compatibilities and functions, such as mobile compatibility, social media type comment streaming and integration with accounting solutions. The company provides full SDK tools and APIs for customized integration, and you can deploy Project Insight in any way you need to in order to satisfy compliance requirements. If you are looking for a project management solution for a mid-market company, Project Insight is a suitable service to put on your short list of PM solutions to call.

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