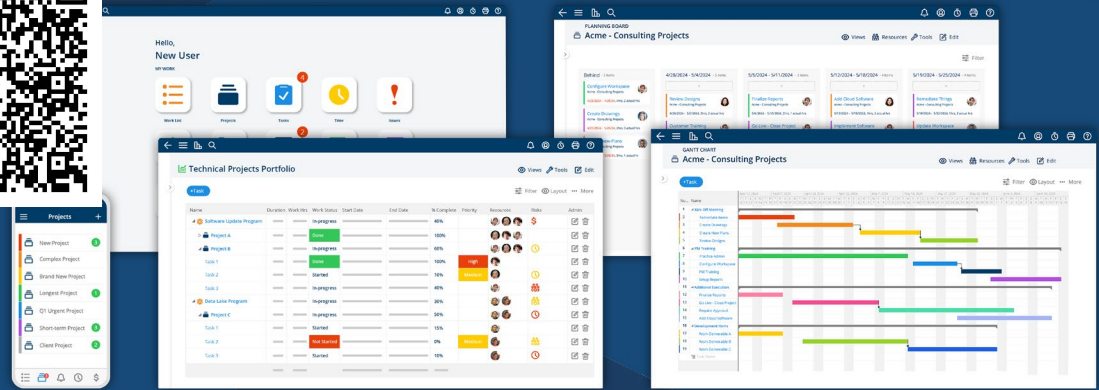


A complete picture of org-wide work.

Project Insight's most popular project & portfolio management capabilities



Core Project & Portfolio Management

Strategic visibility at all levels: project, program, & portfolio.

- Project creation and management
- Task management with dependencies, priorities, and milestones
- Program and portfolio-level visibility
- Cross-project views
- Gantt, Kanban, and hybrid views (Agile or waterfall)
- Sprint backlogs, velocity, and burndown tracking
- Work Breakdown Structure (WBS)
- Project templates and cloning

Resource & Capacity Management

AI-powered capacity planning & forecasting.

- Real-time workload balancing
- Capacity planning across projects and teams
- Skill-based resource assignments
- PTO tracking and availability forecasting
- AI-assisted workload distribution

Time & Expense Tracking

Track and submit time from across all projects.

- Timesheets with approval workflows
- Passive time capture from integrated tools
- Billable vs. non-billable tracking
- Expense reporting with receipt attachments
- Integration with accounting and payroll systems

Budgeting & Financial Management

Control project costs and reprioritize to stay on budget.

- Project budgeting with actual vs. planned tracking
- Forecasting for projects, programs, and portfolios
- Earned Value Management
- Cost tracking by task, resource, or deliverable
- Integration with QuickBooks Online, Xero, and other accounting platforms

Collaboration & Communication

Collaborate where work is already happening.

- Real-time project discussions and comments
- Document storage and version control
- External stakeholder and client portal
- Automated notifications and reminders
- Customizable dashboards for stakeholders

Reporting & Analytics

Live dashboards that replace spreadsheets for good.

- Customizable reports with drag-and-drop builders
- Executive dashboards for KPIs and OKRs
- Portfolio health reports
- Schedule performance analysis
- Risk and issue tracking reports
- Export to Excel, PDF, or API endpoints

Workflow Automation

Project automation that actually moves the needle.

- Automated task assignments and status changes
- Conditional workflow triggers
- Recurring task scheduling
- Approval processes for requests, budgets, and deliverables
- Dynamic schedule adjustments based on dependencies
- Configurable workflows and role-based views to drive adoption/change management

Risk, Issue & Change Management

Address risks, actions, issues, & decisions before they impact delivery.

- Central RAID log with probability/impact scoring to track risks, actions, issues, and decisions
- Mitigation plans with clear ownership tied to project phases or milestones
- Issue logging with escalation, resolution tracking, and approval visibility
- Change request workflows with impact analysis and approval steps
- Roll-up reporting to monitor trends and ensure governance across projects

AI & Advanced Features

Use AI to plan projects, balance workloads, suggest resources, and more

- AI project planning
- AI meeting actions
- AI forecasting & what-if simulations
- AI scheduling
- AI portfolio health insights
- Natural language project search

Intake & Request Management

Standardize intake and accelerate project approval.

- Customizable project request forms
- Automated routing and approvals
- Scoring and prioritization frameworks
- Conversion of approved requests into projects

Add-ons & Specialized Modules

Extend Project Insight with enterprise-ready add-ons.

- SCIM user provisioning and identity management
- Field service tracking with GPS
- Proposal-to-project automation for Order to Cash
- Mobile app with offline capability
- Custom API and webhook access

Strategic Alignment & Prioritization

Clear prioritization and alignment across teams.

- Link initiatives to strategic goals and outcomes
- Score and rank requests by strategic value and urgency
- Model scenarios to allocate capacity and budget
- What-if portfolio planning and trade-off analysis for capacity and budget
- Manage cross-team dependencies and constraints
- PMBOK-aligned portfolio practices

Integrations

Sync with the tools you are already using.

- Bi-directional integrations with Jira, Azure DevOps, & ServiceNow
- Salesforce & HubSpot CRM integrations
- Help desk integrations with Freshdesk and Zendesk
- Accounting integrations with QuickBooks Online & Xero
- Microsoft 365 & Google Workspace integrations
- Slack, Teams, & email-based task updates

Document Management & Knowledge Base

Centralize project documents for easy access and control.

- Structured repository for files and deliverables
- Version history with restore
- Metadata, search, and tagging
- Permissions by file, folder, and project
- Link documents to tasks, risks, and changes

Security, Compliance & Permissions

Keep project data secure and compliant.

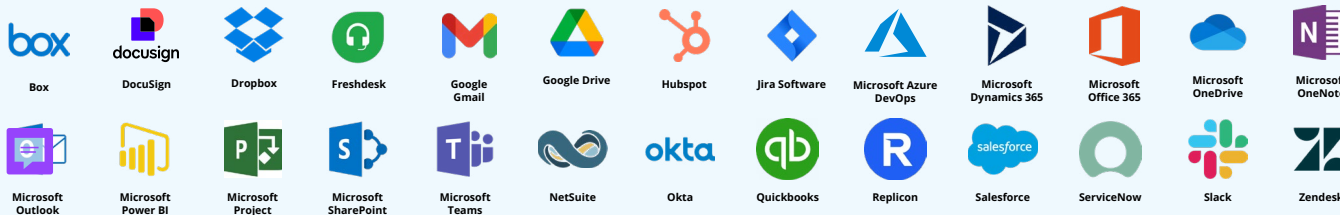
- Role-based permissions and granular access controls
- Single sign-on and SCIM provisioning
- Full audit trails for user and system activity
- Support for GDPR and SOC 2 compliance requirements
- Configurable retention and export policies

OKRs & KPI Tracking

Drive outcomes with OKRs and KPIs everyone can see.

- Define objectives and key results at team, program, and portfolio levels
- Link projects and milestones to measurable outcomes
- Real-time progress tracking with target vs. actuals
- Executive scorecards and drill-down dashboards
- Alerts when metrics trend off target
- Benefits realization tracking

Popular Integrations:



See a demo. Get a complete picture of the work happening org-wide.



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