



User Manual

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Principal Toolbox User Manual

Principal Toolbox 6.0

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1 Introduction to the Principal Toolbox

Principal Toolbox offers a powerful set of tools for the management of your projects, programmes and portfolios. PRINCE2[™] support for projects is offered in project models and in the way processes are supported by the Principal Toolbox by default. Customising Principal Toolbox to follow the processes of your own organisation is easily accomplished.

This manual offers a comprehensive guide explaining how to use the Principal Toolbox. In the application itself the context-sensitive help is available on virtually every page. You can access the

help by clicking the Help button.

The complete manual is available in PDF format for download as well: Download User Manual as a PDF file

1.1 Structure of Principal Toolbox

The projects within the Principal Toolbox are organised in a hierarchical structure. This structure is configured and used within the project side of the Principal Toolbox. The picture below shows how a hierarchy can be build to host programmes and projects.



Example of an Enterprise Hierarchy. Each organisation will have a unique representation of their programmes and projects.

This structure can be changed to fit your organisation's needs. The highest level is called the 'enterprise level'. At this level, folders can be added to represent entities within your organisation.

The folders can be any of the following types:

- Work area: can contain work areas, programmes and project lists
- Programme: can contain work areas, programmes, project lists and projects
- Project list: can only contain projects

By choosing the right type of folders, the actual structure of for example business units, programmes and projects within your organisation can be reflected in the Principal Toolbox. The enterprise hierarchy aids in keeping an overview of all programmes and projects run throughout the organisation.

The same projects that have been fit in with this hierarchy that reflects the organisational structure, can also be made part of a portfolio. Portfolios are manages in a separate area within the Principal Toolbox, and this functionality is provided by an add-on module (<u>Portfolio Management add-on [83]</u>).

The illustration below shows how Project Management and Portfolio Management work together:



1.2 Hardware and Software requirements

The following hardware and software requirements must be in place for using Principal Toolbox.

Minimum Requirements:					
Operating System	Microsoft Windows XP or later				
Browser	Microsoft Internet Explorer 8 or later, FireFox 3 or later or Google Chrome ¹				
Network	Network or internet connection				
Display	Resolution 1024x768 or higher				
Software Requirements for using reports and expo	rts:				
Software	Microsoft Office 2002 or later ²				
Software	Adobe Acrobat Reader 5 or later				
Using Microsoft Project for planning projects:					
Software	Microsoft Project 2002 or later				

If your browser's pop-up blocker settings are configured for maximum security, you will not be able to view any pop-up windows within Principal Toolbox. This includes all pop-up windows, even those that provide necessary functionality such as the calendar pop-up for choosing a date, the help window, and more.

Also some script blockers may be active. You will not be able to use drag and drop functionality within Principal Toolbox (for example the drag and drop functionality on the edit project plan page and the Gannt editor) if these script blockers are not disabled.

Some virus scanners, firewalls or browser add-ons, like the Google toolbar, also have pop-up or script blocking. Consult your software documentation on those products for details on how to configure them to allow pop-up windows and scripts from the Principal Toolbox.

1. Be sure there are no script blocking security settings or script blocking firewalls active.

^{2.} For working with automated reports in Excel, the template needs rights to execute macro's.

1.3 Required Internet Explorer Security settings

The Principal Toolbox is completely web-based. This means it runs in your internet browser. Below you will find a table with the required security settings of the appropriate Internet Explorer security zone used by Principal Toolbox. In Internet Explorer go to *Tools > Internet Options,* select the *Security* tab and choose *custom level* to change the settings.

Sectio n	Setting	Value	Remarks
ActiveX of	controls and plug-ins		
	Initialize and script ActiveX controls not marked as safe for scripting	Enable	Script errors on different pages occurs when disabled.
Download	ds		
	Automatic prompting for file downloads	Enable	Function to pack project offline can't offer to download the offline project.
	File download	Enable	When disabled, automated reports and documents can't be downloaded.
Miscellan	neous		
	Allow META REFRESH	Enable	Internet Explorer window stays blanc after login when disabled
	Allow websites to open windows without address or status bars	Enable	Internet Explorer will display a grey address bar in all pop-ups when disabled
	Launching applications and unsafe files	Enable	Required for installing the MS Project Client add-in.
	Submit non-encrypted form data	Enable	When disabled, Internet Explorer can't update changes in text fields.
	Use Pop-up Blocker	Disabled	Internet Explorer blocks the "Edit name for new item" dialog after adding the first product on the Edit project plan page when enabled
Scripting			
	Active scripting	Enable	Login button on login screen doesn't react. Drag and drop in Edit Project Plan window won't work when disabled
User Aut	hentication		
	Logon	Automatic for logon only in Intranet zone	When Single SIgn On is enabled, this setting allows to sent username and password over the intranet

1.4 Navigation

The Principal Toolbox is a web-based application in which navigation works the same way you are used to on the internet. You perform actions by clicking with your mouse button or by clicking hyperlinks on the page.

However, the regular buttons of your web browser will not work within the application.

Principe Toolbox® (Principal) - Internet Explorer		
😴 💌 http://asp.fortes.nl/Principal/Prince2Look/MySystem.jsp?FolderID=106814&ViewID=-1&SetReturnAdrs=false	👻 🐓 🗙 🚱 Google	+ م
File Edit View Favorites Tools Help		
👷 Favorites 🛛 Principal Toolbox® (Principal)		

Browser buttons won't work

Instead, navigating through Principal Toolbox is done by using the dark blue header within your browser window. **'Project management'** is the highest level in the hierarchy for your organisation's programme and project tree. From there, you can navigate down the branches of the tree to locate your projects.

On your home page, accessible through the **'Home'** link in the dark blue header, you will find all projects, products and log items you are connected to. This way, you can quickly locate your projects and items you have to work on.

Throughout the application, except on your homepage, you will find the so-called bread crumbs that show you where you are in the programme and project tree. Click the bread crumbs anywhere higher up in the hierarchy.

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File Edit View Favorites Tools Help		
Home Portfolio Management Projectmanagement Resource Allocation Time Entry Prince2 FAQ Project Plaza Import / Export	irik Aalbersberg 👻 Help Su	pport Setup 👻
Projectmanagement > IT Department > IT Change projects > Venus Project		<u>^</u>
Dashboard Properties - Product Break Plan Gantt Resource Management - Documents - Portfolio Reports Guide Plaza		= -
Project: Venus Project Edit Members	Pack Project Offline	a Q 🗐
Objective: Realisation of the Venus system Organisation: Albert Swank Status: Into: FORTES Integration Project status: Project initiation Status: Into: Status: Into: FORTES Integration Status: Integration		

Project Dashboard; bread crumbs

1.5 Logging on

Before you can log on to Principal Toolbox, the system administrator must first create a user name for you. After this has been done, you can log on using the following steps.

Note: Some organisations have so-called single sign-on configuration. In this case, you are logged on automatically with your Windows user name.

- 1. Start up Internet explorer and navigate to the Principal Toolbox homepage. The internet address is found in the email that you have received from your administrator. The user name and password are also found in this email.
- 2. The log on window is shown.
- 3. Fill in your user name and password and click **OK**. The Principal Toolbox will open with your homepage.



2 Basics Principal Toolbox

2.1 Home page

12

On the home page you are able to see all programmes and projects you have a role/part in, as well as products, log items (including issues, risks, etc.) that have been assigned to you. After logging on to the Principal Toolbox you will be directed to your home page.

Projectmanageme	ent Resource Allocation Time	Entry Prince2 FAQ	Project Plaza Imp	ort / Export				Erik Aa	ibersberg 👻	Help Support	t Se
Time Sheets											
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nal			(1								
par	Welcome on your perso	nal homepage!		/							
	Here you have access to i	nformation regarding	projecte producte an	d other business							
	that have been assigned t	o you such as issues,	risks, actions and tin	resheets.							
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			Do	uments to be appr	oved by me	$\langle \cdot \cdot \rangle$)				
vner Time Stat	e Sheet Remarks by Owner	Time Entry	Group Doc	ument	Location	-	roject	0	lue Date 🌲		
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ik Aalbersberg New	v	ICT	(2)								
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	ime Sheets pair pa pa pair pa pair pair pair pair pair pair pair pair pair pair pa pa pa	Project / Programme Related To Du Apolo Project / Programme Related To Du Apolo Project / 2. planning loop ut 12.			Project Project Project Provent Provide To De Date Project Project Provent Project P	Project Project Project Project Project Project Prove Project Prove Project P		Trine Sheets	The Sheets Customise Page Text Customise Page	Project Netcome You brue access to information regarding projects, strobaltis and other business that have been assigned to you such as issues, risis, actions and timesheets. Customise Page Text Customise Home Page Image: Come on your personal homepage! Image: Customise Page Text Customise Home Page Image: Come on your personal homepage! Image: Customise Page Text Customise Home Page Image: Come on your personal homepage! Image: Customise Page Text Customise Page Text Image: Come on your personal homepage! Image: Customise Page Text Customise Page Text Image: Come on your personal homepage! Image: Customise Page Text Customise Page Text Image: Come on your personal homepage! Image: Customise Page Text Decement Image: Customise Page Text Image: Come on your personal homepage Image: Customise Page Text Decement Image: Customise Page Text Image: Come on your personal homepage: Image: Customise Page Text Image: Customise Page Text Decement Image: Customise Page Text Image: Customise Page Text Image: Customise Page Text Image: Customise Page Text Image: Customise Page Text Image: Customise Page Text Image: Customise Page Text Image: Customise Page Text Image: Customise Page Image: Customise Page Text	Project Indicating function and the project in addition of the project in additin addition of the project in additin additin

Home page

- 1. Area for general information.
- 2. Time sheets to be filled in and/or approved (add-on Timesheets)
- 3. Products/documents to be approved (add-on Advanced Customisation & Workflow)
- 4. All programmes and projects you have a role in.
- 5. All products, issues, risks, quality reviews, actions and changes assigned to you.

Configuring your home page

To configure the layout of your personal home page, click the button **Customise Home Page**. The opened window gives you the possibility to select:

- Which programmes should be displayed.
- Which projects should be displayed.
- · How to display the products.
- How to display the log items.

Customise home pa	Edit Close
Portfolio Section:	 Do not show portfolios on my home page Show portfolios of which I am a manager Show portfolios of which I am a member or a manager
Programmes Section:	 Do not show programmes on my home page Show programmes of which I am a programme manager (includes view selector) Show programmes of which I am a member or a manager
Projects Section:	 Do not show projects on my home page Show projects of which I am a manager Show projects of which I am a member (includes my role as a project manager)
Workpackage Section:	OD not show work packages on my home page Show work packages of which I am an owner/reviewer/participant (includes view selectors)
Products Section:	Do not show products on my home page Show products of which I am an owner/reviewer/participant (includes view selectors)
Activities Section:	O Do not show activities on my home page Show activities of which I am a participant
Logs Section:	 Do not show logs on my home page Show logs using full width of which I am an owner (includes view selectors) Show logs using half width of which I am an owner (includes view selectors)

Editing Home page settings

Tabs shown on your home page

Your home page displays several tabs. Depending on your organisation's license some tabs might not be available. Here you can see:

- Approve Hours shows all hours from other users you should approve or disapprove.
- My Time Sheets shows all your time sheets when time registration is turned on.

2.2 Enterprise dashboard

The Project Management dashboard is the highest level in the programme and project tree. Note that **'Project Management'** can be replaced by the name of your organisation. The Project Management dashboard is accessible through the link in the blue header.

On the Project Management dashboard you are able to reach all programmes within the organisation and you are able to get information regarding the progress of programmes as judged by the programme manager.

Home Portfolio Management Projectma	nanagement Resource Allocation Time Entry Prince2 FAQ Project Plaza Import / Export	Erik Aalbersberg 👻 Help Support Setup 👻
Projectmanagement Dashboard Documents & Projectmanageme 1	els Archive Edit Prope	erties Edit Members Edit Widgets 🕱 🖨 Q
Automated Reports Edit	Principal Welkom op het Enterprise niveau van de Principal Toolbox! "Simply Fortest"	2
Reports Propartmest Project Products Issues Raks Change reviews Actions Lessons learned Cost / Hour Entries System Resources Project Resources	Programmes / Project lists New Move Ar T Department Henk Voser Contains all Trelated projects Other projects Herman Mulder Contains all other projects	chive * Dashboard • View Options •
Entries		

Enterprise dashboard

1. Tab pages

The tab pages are standardized on the enterprise dashboard. The name of the tab page indicates the content of the page.

 Documents & Knowledge 	:	A folder structure can be created here where files of any format
		can be stored and shared.
- Models	:	An overview of the project models on the enterprise level.
- Archive	:	Archived work areas / programmes / project lists and project

Archive

- models on the enterprise level.
- 2. Functions at enterprise level

With these buttons you can edit user roles on the Enterprise dashboard ('Edit members'), edit the text and the image on the dashboard ('Edit'), add and edit widgets ('Edit Widgets'), send an e-mail, print the current page and search the entire database.

3. Programme listing

A list of all work areas / programmes and project lists on this level. Shown behind each programme name is a RAG indicator which indicates the status of the programme and the manager's name.

4. Reports

This area is shown if you have either a manager role or a reader role on this level. Reports give you access to views (tables) concerning all programmes, projects, products etc. within all project within the database.

2.3 **Programme dashboard**

The programme dashboard provides you with an overview of all sub-programmes and projects within the respective programme.

Home Portfolio Management Projectmanagement Resource Allocation Time Entry	y Prince2 FAQ Project Plaza Import / Export			Help Support Setup 👻
Projectmanagement > IT Department > IT Change projects				A
Dashboard Properties - Gantt & Dependenci & Knowledge Mode	als Archive			
Project list: IT Change projects		Edit Properties Edit Members E	Edit Tolerances Edit Widgets	5 🖉 🖨 Q
Name: IT Change projects Description: Change pr IT depart 3	Welcome! "Keep it simple and straightforward!"	6		
Logs Projects	New	Import Export Move Model Archive	* Dashboard	View Options -
I Issue log		Current Stage Progress General P	Planning Hours Costs Pro	oject Manager(s)
R Risk log (4) Office 2010 Implementation		22-Jan-2013	🥒 🗧 🍯 Ре	ter Cole E
A Daily / Action Io		Project opstart	👂 🕚 Sa	muel Davies
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Reports				
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Quality reviews Standaard Prince2 2009 project model		Project model voor grote en/of complexe proje	acten	
Lessons learned				
Cost / Hour Entries Project Resources				
Entries				-

Programme dashboard

1. Tabs

The tabs are standard for each programme. The name of the tab indicates the content of the page. Depending on your organisation's license some tabs might not be available.

- Properties An overview of the programme properties and history. 1 - Gantt & Dependencies Graphical representation of all projects within the programme. - Documents & Knowledge : Archive of important documents and/or useful best-practices. - Models An overview of the project models within the programme. - Archive Archived projects and project models within the programme. 5
- 2. List of projects (and programmes when applicable) Gives an overview of the projects within this programme. A number of figures are presented that enable you to get an overview of the project status. The traffic lights used for the planning, hours and costs are defined by the tolerances 56 set by the programme manager.

3. Programme information Some information regarding the specific programme (name, objective and status).

- 4. Logs On programme level the following logs are available for use; issue, risk and daily/action log. A counter is displayed for each log indicating the number of items there are for each log and if there are new items. The log is selected by clicking the name of the log.
- 5. Report Creation of reports/views about all projects and products within this programme.
- 6. Functions at programme level

Here you can make the 'Programme dashboard' available to <u>users</u> (**'Edit members'**), change the text and the logo of the dashboard (**'Edit Properties**'), send an e-mail, print the current page, use the search function. The programme manager can also setup the <u>tolerances</u> of for the planning, hours and costs of all projects with this programme by using the **'Edit Tolerances**' button.

7. List of available project models Gives an overview of the project models available within this programme.

2.4 Permissions and roles

Authorisation model

The Principal Toolbox allows for two types of users:

- 1. Administrators, who get access to everything everywhere
- 2. Users, who get access to entities and areas within the Principal Toolbox by assigning them roles

The roles that are assigned to a user determine what access the user has. Access can be restricted to various actions, like getting read-only access or allowing full access including removing items. A user can be assigned multiple roles at the same time. Below follows an overview of the various roles and the access rights associated with them.

Roles on enter	prise, work a	areas, prograr	nmes, and p	roject lists
----------------	---------------	----------------	-------------	--------------

Role	Rights
Enterprise Manager (enterprise = highest level in the programme hierarchy)	 Create and archive programmes on the enterprise dashboard Assign <i>programme manager(s)</i> to a new programme Assign <i>programme reader(s)</i> to a new programme Manage roles at the enterprise level Access information of all programmes and projects Modify picture and text on enterprise dashboard
Enterprise Support	Identical access rights as the Enterprise Manager
Enterprise Reader	 Access information of all programmes and projects
 Work area / programme / project list Manager Work area / programme / project list Support 	 Create, move and archive projects and project models on assigned level Create, move and archive sub-programmes Remove and restore archived projects, project models on assigned level Assign project manager to a new project Manage roles (managers and readers) of assigned level Create, edit and remove issues, documents, risk's etc. within assigned level Read all information within own and underlying levels Set tolerances for the projects within assigned programme / project list Modify layout of programme / project list dashboard

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Role	Rights
Work area / programme / project list Reader	 Read all information within own and underlying levels

Roles on portfolios

Role	Rights
Portfolio Management Manager	 Create and archive portfolios Assign managers and readers to individual portfolios Manage roles at all levels within the portfolios Access to all portfolios and their data Create and archive portfolio items within portfolios Administer portfolio models Remove and restore archived portfolio items Assign a project manager when starting a project from a portfolio item Changing the portfolio dashboard layout
Portfolio Management Reader	 Read access to all data within the assigned level
Portfolio Management Members	 Can be assigned to individual portfolios as readers or managers Note: before being granted access to portfolios, users first have to be a member of Portfolio Management

Roles within projects

Role	Rights
Project Manager and Project Support	 Manage all information within own project Edit project plan, planning, logs, etc. Edit project team Set the general status of own project Modify lay-out project dashboard
Project Board members (Executive, Senior User, Senior Supplier)	Read all information within a projectAdd issues to the issue log
Team member	 Read all information within a project, except project costs information. Add issues to the issue log

Roles on products

Role	Rights
Owner	 Add deliverables (documents) to a product Add new log items (issues, risks, changes, actions, quality reviews) related to the product. Editing all product specific and custom fields
Reviewer	 Add deliverables (documents) to a product Add new log items (issues, risks, changes, actions, quality reviews) related to the product. Editing all product specific and custom fields
Participant	 Add new issues related to the product.

Role	Rights
Owner	Change all information in a log itemAssign the log item to another project team member
Creator	Change all information in a log itemAssign the log item to another project team member
Project Manager and Project Support	Change all information in a log itemAssign the log item to another project team member

Roles on logs (issues, risks, changes, actions, quality reviews)

Roles within Resource Allocation

Role	Rights
Resource Allocation Manager	 Has the following rights on all Resource Pools: Assign users to resource pools Remove users from resource pools Changing properties of resource pools Managing the Non-project Activity Sets Defining resource availability Allocating project and non-project work
Resource Allocation Reader	 Has the following rights on all Resource Pools: Access to all resource pools Reader access to all allocation requests, time allocations, and availability data
Resource Allocation Members	 Can be assigned as managers or readers to one or more resource pools Note: before assigning users as managers or readers to a resource pool, they first have to be listed as a Resource Allocation Member.
Resource Pool Manager	 Assigning and removing users from the resource pool Changing properties of the resource pool Assigning and removing Non-project Activity Sets from the resource pool Defining resource availability Allocating hours against projects and non-project activities
Resource Pool Reader	 Read access to the resource pool This includes read access to all allocation requests, time allocations and availability data on the applicable resource pool

Roles within Time Entry

Role	Rights
Time Entry Coordinators	 Has the following rights within all Time Registration groups: Assigning and removing users from the Time Registration groups Changing properties of Time Registration groups Managing Non-project Activity Sets Creating and changing Time Registration configurations Reading and modifying of the time sheets of all users
Time Entry Readers	Has the following rights within all Time Registration

Role	Rights
	groups:Access to all Time Registration groupsRead-only access to the time sheets of all users
Time Entry Members	 Can be assigned access to one or more of the Time Registration groups Note: before assigning users as managers or readers to a Time Registration group, they first have to be listed as a Time Entry member
Group Manager and Group Support	 Assigning and removing users from the applicable Time Registration group Modifying properties of the Time Registration group Managing Non-project Activities associated with the Time Registration group Modifying time sheets of all members of the Time Registration group
Group Reader	 Read access to the Timer Registration group This includes read access to the time sheets of all the members of the Time Registration group

2.5 Entering and changing data

To enter and change data, you will always have to click the **Edit** button. If you have the user rights to edit data and the page contains editable fields, you will always find this button on the page you are at.

When creating new log items, like issues, risks etcetera, you will directly enter the *editing mode*, so you won't have to click edit.

2.6 The use of colours within projects

On the project dashboard, colours are used to indicate the active stage, types of products and to draw attention to potential problems.

Stage colour

The active stage in your project is coloured yellow, the other stages are grey. It does not mean the other stages cannot be edited, it is an indication and used for filtering purposes in certain views. In the product checklist, stage names are shown in black. On the Gantt chart, stage bars are also shown in black.

Types of products

Three types of products are identified in Principal Toolbox. Throughout the Principal Toolbox, these are shown in the following colours:

- Green: products of the project board, mostly authorisations and decision points.
- Blue: project management products, like the project mandate, PID, highlight reports etc.
- Amber: Specialist products. Specialist products are all products that are part of the product breakdown and define the final result of the project.

Work packages are shown in a bold amber font type. On the Gantt chart, work packages are solid amber.



Active stage in yellow

Proc	lucts		1	Edit Ow	ner & Milesto	nes Edit F	Project Plan	Set E	aselir	·	4	
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Θ	Project initiation											
		Owner	Start	D)raft (Checked	Final	P	DI	R) C	A
	Project Initiation Document (PID)	John Edwards	04-Feb-2	2013		-	08-Feb-2013	-		-		-
	Project Authorisation	-	11-Feb-2	2013		-	12-Feb-2013	-		-		-
Θ	Eerste fase											
		Owner	Start	D)raft (Checked	Final	P	D	R) C	Α
	Work Package 1	John Edwards	15-Feb-2	013								
	Product B	Comin Edwards	15 Feb 2	013		-				-		_
	Product C	-	13-1 60-2	.015								_
	Product A	_	_	-		_	-			-		-
	Highlight Reports					-		-		-		-
	Stage Plan update	-				-		-		-		-
	Project Plan update					-		-		-		-
	Next Stage Authorisation	John Edwards				-		-		-		-
Θ	Project closure											
		Owner	Start	D)raft (Checked	Final	P	D	R) C	Α
	Follow-up recommendations					-		-		-		-
	Lessons learned report	-				-		-		-		-
	Project decommissioning					-		-		-		-

Active stage in yellow. Passed planned milestones in red. If final milestone has passed, red indicator in front of product.

it Project Plan			Save	Canc
New stage New w	orkpackage New spec. product	New man. product New man. product	Сору	produc
roject plan		Specialist Management Work pa	ckages	
- of oct prair		Product Breakdown	<<	>>
Project start-up	New	Product A		
Project Mandate	New	- Product B		
		T IOUUCI O		
Project initiation	Project plan			
Project Initiation Document (PID)	r toject plan			
Project Authorisation				
	Unseeign			
Eerste fase	Unassign			
Work Package 1				
Product B	To rename, double-			
Product C	click on item.			
Product A				
Highlight Reports	To permanently remove items			
Stage Plan update	drag them into the trash can.			
Project Plan update	Bamaya			
Next Stage Authorisation	Remove			
Project closure				
Follow-up recommendations				
Lessons learned report				
Project decommissioning	<u> </u>			
	m			

Three different colours for different types of products

Indication of potential problems

On the project dashboard, dates are default depicted in black. If a date is either today or in the past, it is shown in red to draw attention.

In front of the product names indicators show potential problems:

(red)	Final planned date has passed.
(yellow)	An inconsistency is present with the product milestones (e.g. start milestone is planned later than the draft milestone)
(blue)	Is shown when a conflict arises due to conflicting dependencies. If an end date of a ' Predecessor' is delayed or planned later than the start date of the 'Successor' a blue traffic light is shown to indicate a problem.

In the following section, the <u>use of RAG indicators</u> on programme / project list dashboards is explained.

2.7 RAG indicators (traffic lights)

On dashboards of work areas, programmes and project lists, and on your home page, the status of projects is shown with RAG indicators. These indicate the actual status on a programme, project, or product.

The red, amber and green indicators are used in respect to the status of the enterprise, programme, or the project.

For projects, indicators are shown for:

- General status : Set manually by the project manager to give the general opinion about project status.
- Planning status : Based on the tolerances of the programme / project list. Uses the number of products overdue.
- Cost status : Based on the tolerances of the programme / project list. Uses the deviation of expected costs from the budget.
- Hours status : Based on the tolerances of the programme / project list. Uses the deviation of expected spent hours from the budget.

(red)	- Major deviation from the plan on costs, hours or planning. - Based on the tolerances set.
(amber)	 Minor deviation from the plan on costs, hours or planning. Based on the tolerances set.
(green)	 No deviation from the plan on costs, hours or planning. Based on the tolerances set.

The tolerances on the programme / project list can be defined by the programme manager at the dashboard of that level. These tolerances can be set in percentages or in absolute numbers.

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$\leftarrow \bigcirc \boxed{0}$	http://localhost:9000/Demo_4/Prince2Look/MySystem.jsp?FolderI		ncipal Toolbo	x® (Demo)	×						☆☆ 🕸
File Edit Vie	ew Favorites Tools Help										
Iome Portfolio	Management Projectmanagement Resource Allocation Time	Entry Prince2 FAQ	Project Plaz	za Import /	Export				Eri	ik Aalbersberg 👻 Help	o Support Setup 👻
Projectmanagen	ment > IT Department > IT Change projects										-
Dashboard Pr	roperties - Gantt & Dependencies Documents & Knowledge	Models Archive									
Project I										Edit Widgots	
	Principal Toolbox® (Demo) - Windows Internet Explorer provide	ed by Principal Toolbo	x							Edit Widgets	
Name:	Programme and Project Tolerances								Close		
Descriptio	Set tolerances								0.000		
Statue	Enter the tolerances for the projects in this programme / project differently by setting alternative values in the list below	t list. The default toler	rances can be	e set in the f	irst row. For	specific proje	ects, the toler	ances can be	set		
status.											
	Tolerances can be set absolutely or relatively (percentage	based) for the following	ng dimension	s:							
	 Stage Planning Shows whether or not the active stage is running behind, or 	or on schedule with res	spect to the p	lanned end	date.						
Logs	Product Planning Counts the number of products everytes (in respect to the	atal number of produc	to in the proj	oct plan)						Vi	iew Options -
Issue loo	Costs	total number of produc	Lis in the proj	eur pian).						Costs Project N	Manager(s)
R Risk log	 Summarizes the costs (committed, actual and remaining) - Hours 	and compares this in r	espect to the	budget for a	all products i	n the project	plan.			 Peter Co 	ble
A Daily / A	Summarizes the hours (committed, actual and remaining)	and compares this in I	respect to the	budget for	all products	in the project	plan.			Samuel	Davies
	Default project tolerances						Edit	* Planning	Tolerances	Jan Jans	sen
Automated		Stage	e Planning Tol	erance		Product Pl	anning Tolera	nce	Tolerances .		
Regran	Name 😞	Oran	ge (%) (Abe)	Red (%)	Red (Abs) Orange (%	Orange	Red (%) Red	d (Abs) Active	 Albert Sv 	wank
	IT Change projects		0	0	0	0 0) 2	0	4	 Erik Aalb 	bersberg
Reports											
Programmes	Project specific tolerances (exceptions to the default toleran	ices)					Edit	* Planning	Tolerances -		
Projects		Stage	e Planning Tole	erance		Product Pl	anning Tolera	nce		Import Exp	ort Archive
Issues	Name 🚖	Project Specific Oran	ge (%) Orange	Red (%)	Red (Abs) Orange (%	Orange	Red (%) Red	d (Abs) Active	Own	ner(s)
Changes		Tolerances	(Abs)			, ,	' (Abs)	. ,	Stage Only		
Quality revie	Apolio Project		p	0	0	0 0	0	0	0		
Lessons lear	Omega Project		0	0	0	0 0	0 0	0	0	-	
Cost / Hour I Project Reso	Venus Project		0	0	0	0 50) 0	100	0		
Entries	Zeus Project		0	0	0	0	0 0	0	0		

Tolerances can be set on the programme level

The use of indicators within projects is explained in the <u>previous section</u> 18. For setting the tolerances in a programme or projectlist see: <u>Setting tolerances</u> 56

2.8 Views

Throughout Principal Toolbox, views are available to present information in a tabular form. On all organisational levels (e.g. enterprise, programmes, project lists) and within projects (on all logs and the **'Plan'** and **'Report'** tab) views are used.

The Principal Toolbox contains predefined views that are generally useful, but it is also possible to define your own views for your personal purposes. All views can be used for monitoring progress or in <u>automated reports</u> [127].

Reports											Close	ė	Â
Projects				ĥ			XI	* All Proje	ects	Vi	ew Options	-	Е
Name 🔶	Objective	Current Stage	Status	Status Description	P	Planning Status	ŀ	lours Status	Costs Status	Project Man	ager(s)	-	н
Apollo Project	Office 2010 Implementation	Project initiatie	•	Status blijft op groen staan, ondanks toegenomen risico op late levering.	,		(•	Peter Cole			
Diesel Project	Implementatie nieuwe workflow	Stage 1	•						•	Jan Jansen			
Juno Project	Back-up maken van alle vorige versies	Project opstart	•						•	Samuel Dav	ries		÷

Use the drop-down list as shown in the picture above to select available views. With the **View Options** drop-down menu you can define your own view and set options for views.

Note: on the Reports tab, you can choose the object you want to see information about in your project: Products, Cost/hour entries and Resource assignments are options. **Note:** Resource assignments are only available when the add-on <u>Resource Allocation</u> is available within your organisation.

The different options in the View Options menu are:

:	Define a filter to make a selection of the shown products / issues / etc.
:	Add or remove columns from the view.
:	Set the column width, so the view fits better on screen or in a report.
:	Define calculations on certain columns.
	Show or hide column names
:	This sets a view to the personal default.
:	Save the view for later use.
:	Set properties for the view. You find more information at 'Manage views 23'.
	:

Note that on some pages not all functions are available for use. The following example illustrates how to define a view on the 'Report' tab. The view will show all finished products and totals of budgeted and actual hours and costs.

- 1. Go to the '**Report**' tab.
- 2. In this example we will add a filter that shows all finished products in the project. Since we want to see a list of *products*, we choose **Products** in the left hand side of the window.
- Click Set Filter in the View Options menu.
 To select finished products set the field 'Final Status' to 'true'. After clicking OK you get a view of the selected, finished products.
- 4. With Set Columns you can add and remove columns from the view.
 - To add columns to the view, select them on the left side in column 'All fields'. Click the >> button to add the columns.
 - To remove columns from the view, select them on the right hand side and click << to remove.
 - Set the order of columns with the up and down buttons.

You can also set the Sorting order of the view. The field 'Complete list' will show you either 50 results per page or the entire list on one page.

5. Change the column widths with the **Set Widths** option. Drag the line between columns to increase or decrease the column size.

Note: If you would like to use your 'own' views for reporting you will have to take into account the maximum width of a page. The columns may not be wider than the portrait or landscape headers. Otherwise the table will be too wide for the page.

How to create your own report templates is described in the section <u>Automated</u> Reports 127

Note: the bars for portrait and landscape are of approximate size. Check the result in your reports.

- 6. To show totals of numerical fields click the '**Advanced**' option, and select the columns for which you would like to know the totals. Click **OK**.
- 7. If you want to save the newly defined view you need to save it with Save View. To overwrite an existing view you saved before, select the name of this view at the Existing view pull down list. To create a new view enter the new name at 'New view'. Click Save to save the view.
- 8. Select personal, local or global. See manage views for more information.
- 9. With the '**Make Default**' option a specific view can be set to the personal default view on that page
- 10.With the button '**Manage Views**' the views available can be managed. See <u>Managing views</u>. 23

View Options -

Set Filter

Set Columns Set Widths

Chart Options Advanced

Make Default

Manage Views

Save View

Tip: If you define a (new) view as standard with the '*Make Default*' button, the view will be shown when opening that tab.

2.9 Manage views

Within the Principal Toolbox all users are able to define (personal) views of the information presented on the different report pages.

As already explained in the previous section, views can be defined on the different levels (e.g. enterprise, programme), on all logs and on the 'Plan' and 'Report' tab.

With the **Manage Views** option, which is available on all mentioned pages, you can manage these views.



- 1. Go to a page where views can be defined and click Manage Views.
- 2. A window will pop-up which lists all available views for this page. This window shows all available views.

Built-in views	:	Predefined views which are standard within the Principal Toolbox.
Global views	:	Global views defined by the organisation.
Local and personal views	:	Project or user specific views

The settings for the global views can be modified by the system administrator. The settings for the local and personal views can be modified by the user who has created the view and the system administrator.

Manage the list of availab - Global: Views can be us - Local: Views can be us - Personal: Only you can	le views. The following view types exist. sed by everyone, everywhere. Only system administrators can adapt ti ed by everyone on this location. System administrators and coördinate use and adapt these views. Views are available everywhere.	hese views. ren can adapt these views.	Back
Personal Views			Remove Export Import
Name	Remarks by Owner	Creator	Published Hidden
Local Views			Remove Export
Name	Remarks by Owner	Creator	Published Hidden
Global Views			Remove Export
Name	Remarks by Owner	Creator	Published Hidden
Project Costs	AR	Albert Swank	18-Mar-2009 -
Builtin Views			
Name	Remarks by Owner		Hidden
Costs			-
Costs and Hours			-
All Projects			-
Hours			-
Project Organisation			-

List of views

3. To modify a view, click the name of the specific view. The built-in views can be hidden from the users of the Principal Toolbox (helpful for views defined only for reporting purposes). To do so click

the specific view and place the tick mark

4. General and local and personal views have some more options that can be defined;

Name Remarks Hidden	:	To change the name of the view. Add remarks to the specific view. Makes a view not visible in the pull-down menu. The view is still available for the automated reports.
Type Location	:	Select availability for all users (view becomes a general view) or personal. Everywhere; view is available on all locations (all levels). On this location only; view is available on this specific location(e.g. this project only).

Name: P	roject Costs	Creator:	Albert Swank	
Remarks by Owner:	R			
Hidden:				
Type:	Blobal 👻			

Adding a new view

5. Furthermore, you are able to import and export views. To export a particular view click the 'Export' button and save the view to your desktop location. To import this view again click the 'Import' button on the 'Manage views' page and select the *.ptv file. This view will be added as a personal and local

view. Using the buttons as described above the type of view can be changed.

6. To remove views from the Principal Toolbox use the remove button.

2.10 Document management

Within the Principal Toolbox you can store documents at various locations. Principal Toolbox will keep the document in the database, so they will be available to all users with access to the document in the Principal Toolbox. It is possible to overwrite older versions with newer ones. The Principal Toolbox will keep the old versions in storage. These will remain available for the manager of the particular level in the tool.

On top of that, it is possible to put an approval cycle on deliverables and/or documents with the add-on 'Advanced Customisation & Workflow'. See <u>Document management and approval</u> for more information about storing documents in Principal Toolbox.

2.11 Email function

From almost any page in Principal Toolbox you can create email messages. These messages will automatically be addressed to the relevant team members, or e.g. the owner of log items etc. The message itself will contain summarised info about the page you created it from, and a hyperlink to the page in Principal Toolbox.

- 1. Click the email button in the upper right hand corner of a specific page. In this example a new issue is created on the Apollo project and we want to inform the members of the new issue.
- A new page will appear with a short description of the item (in this case: issue 12). You can select the project members you wish to notify. These can be inserted manually or by clicking **To**, **CC** or **BCC**.

roperties History							
ssue 16: Planning	g will not make it			Ed	it Back		ė
Description:	Planning will not make it		Owner:	John Edwards			
Type:	Issue		Creator:	Erik Aalbersberg			
Status:			Create Date:	20-Sep-2011			
Priority:			Product:	Project Initiatie Document (PID)			
Due Date:	23-Sep-2011		Remarks:				
Decision:	Open						
Seëscaleerd:	-		Test Aloc:				
ctions				New * Open	Actions		Ŧ
Nr Name	Description	C Owner	Related To	Due Date Remarks by Owner			
Discussions						ħ	New
reator (Date) M	essage						
ocuments (files, links	s, text)				Add	Add N	lote
Name	Description			Revision Published	Publisher		

Q

- Check the default contents of the message. You can make changes to it as you wish. Be careful to let the hyperlink intact, since this is very helpful to the recipient(s).
- 4. When finished, click **Send e-mail** and the mail is sent to the recipients.

Select members to n	otify
Create a notification e-m Click on 'Send e-mail' whe The Principal toolbox will s	all. yes are ready. and the e-mail to the selected e-mail addresses.
Edit information to send	
To: i	j edwards@mail.com
Ce:	
Boc:	e.aalbersberg@fortes.nl
Subject:	Issue 16: Planning will not make it
wessuge: :	The tass 16. Privancy with or final of this C has charged. Press review the charges and take appropriate action. Additional information: Harbor to Private the Constant (PD) Private Available Private Private Available Private Private Available Private P

Note: Since the email is sent by Principal Toolbox itself, the message will not be stored by your normal email software. For this reason, you get a 'BCC' of the email message.

2.12 Search function

The search function allows you to perform keyword searches. You can also use the creation period to specify the period when the item was created.

The search function can be found on all dashboards and on the home page.

-u	rch				
Adv	anced Search				
Sear	rch:	PID			
Туре	e:	Project			
Crea	ated before:				
Crea	ated after:				
Cor	arch				
360	arcii				
38					
lote:	Seach results are limited to the first	100 hits.			
lote:	Seach results are limited to the first	100 hits.			
lote: Searc	Seach results are limited to the first	100 hits.			
Vote: Gearce	Seach results are limited to the first ch results (folders): Name / Location	100 hits. Description		Owner	Date
Note: Searc	Seach results are limited to the first ch results (folders): Name / Location	100 hits. Description		Owner	Date
Note: Searce Type	Seach results are limited to the first ch results (folders): Name / Location	100 hits. Description		Owner	Date
Searce Searce Searce Searce	Seach results are limited to the first ch results (folders): Name / Location ch results (documents / files / hype Filename / Location	100 hits. Description rflinks): Description	Revision/Doc nr	Owner Publisher	Date
lote: Gearco Searco Searco Searco	Seach results are limited to the first ch results (folders): Name / Location Ch results (documents / files / hype Filename / Location	100 hits. Description rlinks): Description PID Apollo 3.5	Revision/Doc nr v3.5	Owner Publisher Erik Aalbersberg	Date Modified 31-Mar-2010
lote: Gearce Searce Searce Searce Searce	Seach results are limited to the first ch results (folders): Name / Location ch results (documents / files / hype Filename / Location Projectmanagement > IT Department	100 hits. Description Tlinks): Description PID Apollo 3.5 IT Change projects > Apollo Project > Project Initiatie > Project Initiatie Docum	Revision/Doc nr v3.5	Owner Publisher Erik Aalbersberg	Date Modified 31-Mar-2010
Searce Type Searce Type	Seach results are limited to the first ch results (folders): Name / Location Ch results (documents / files / hype Filename / Location Projectmanagement > IT Department _PID.rtf Projectmanagement > IT Department	100 hits. Description Flinks): Description PID Apolto 3.5 > IT Change projects > Apollo Project > Project Initiatie Docum PID - Final > IT Change projects > Project Amlin > Initiating a Project > Project Initiation Docu	Revision/Doc nr v3.5 v14	Owner Publisher Erik Aalbersberg Erik Aalbersberg	Date Modified 31-Mar-2010 06-Sep-2010
Vote: Searce Searce Searce Sype ×	Seach results are limited to the first ch results (folders): Name / Location Ch results (documents / files / hype Filename / Location Projectmanagement > IT Department _PID.rtf Projectmanagement > IT Department : _PID.rtf	100 hits. Description rtinks): Description rtinks): Description PID Apollo 3.5 IT Change projects > Apollo Project > Project initiatie > Project Initiatie Docum PID - Final PIT Change projects > Project Amlin > Initiating a Project > Project Initiation Docu Project Initiation Documentation	Revision/Doc nr v3.5 v14 v1.0	Owner Publisher Erik Aalbersberg Erik Aalbersberg Erik Aalbersberg	Date Modified 31-Mar-2010 06-Sep-2010 24-Mar-2010

2.13 Project models

In Principal Toolbox, all projects that have been created are based on a project model. A project model is an extensive template for projects. It contains products, document templates associated with these products, lessons learned, and automated reports. This way, it is possible to have standardised projects throughout the organisation, and project managers always have the right document and report templates available. Right from the start of the project, automated reports (if configured correctly) are available for reporting purposes. Below, an example of the dashboard of a project model is shown.

Home Portfolia	o Management Projectma	nagement Resour	ce Allocation Time Entry Pri	nce2 FAQ Project Plaza Import /	Export			Erik Aalbers	iberg 🔻 Help	Supp	ort Se	up 🕶
Projectmanage	ement > Standard Prince2	2009 P										~
Dashboard F	Properties Product Break	down Plan Proje	ct related documentation Rep	ort Guide								
Project M	odel: Standard Prir	nce2 2009 Pro	ject Model (UK)			Edit Properti	es Edit Members	Configure Process	Diagram		٩	וו
Objective: Organisation	Project model for larger and/or com [more]	Starting-up a P	roject Initiating a Project	Stage 1 Stage 2 Execution Stage	1	Closing a Project						
Status:		Directing a Project	i									
Info:	This project model provides you with a full set of management products [more]	Starting Up a Proj	ect (Initiating a Project	Directing a stage	ng stage ries	Closing a Project						Е
Logs	PRINCE2*	Products		O _{Proje}	ct Board O Project N	lanager O Team Members	Owner & Milestones	Edit Project Plan	Set Baseline	* *+	-	
	New Total	 Starting-u 	p a Project									
U Issue log					Owner	Start	Draft Check	ed Final	PDI	RQ(<u>C</u> A	
R RISK log		Project Mar	idate		-	-						
Q Quality rev	new log	Project Brie	f			-		-				
C Change log	9	Initiation St	age Plan		-	-						
A) Daily / Acti	ion log	Initiation St	age Authorisation		-	-						
L Lessons le	earned log		a Project									
Minutes of	meetings	-			Owner	Start	Draft Check	ed Final	P D III	RQ	C) (A)	
		Business C	ase		-	-		-				
Automated I	Reports Edit	Project Initi	ation Documentation (PID)		-	-		-				
Highlight	Report	Next Stage	Plan		-	-						
End Stag	e Report	Project Aut	horisation		-	-		-				
		Execution	Stane 1									

Part of the dashboard of the PRINCE2 project model, which is identical to a project dashboard.

It is possible to have multiple project models within your organisation. So you can have a default PRINCE2 project model for general use and more specialised project models with specialised content. For instance, a project model for sales or for software implementation. For these purposes, you are able to build a product breakdown (see the section about product breakdown 32) that matches most situations for these specialised projects. When starting a project based on one of the models, you are able to adapt the product breakdown to fit the specific circumstances of the project.

More information about the creation and management of project models can be found in the section Managing project models 74.

2.14 Portfolio models

When creating a portfolio, it will be based on a portfolio model. This is similar to how a project is based on a project model.

A portfolio model contains automated reports, pre-defined project sheets, reporting models and a financial model. Using portfolio models ensures that portfolios throughout the organization follow the same standards.

Portfolio Management > Portfolio R&D (t) Dashboard Properties	Portfolio Gant Documents	Archive Portfolio Logistics Overview of all projec quarter. Maximum FT	Edit F ts within the lo E available is	Properties E ogistics departr 17. If more is r	dit Members Custo ment with the priority needed, hiring will be	mise Page Text	Edit Field Co er	nfiguration	Edit Page La	ayout E	Edit Widgets		٩
Dashboard Properties Financials Portfolio: Portfolio R&D (UK) Name: Portfolio R&D (UK) Description: Portfolio of the R&D departments Status: Status: Description: Automated Reports Edit.	Portfolio Ganti Documents FORTES Projects (Portfolio Manage	Archive Portfolio Logistics Overview of all projec quarter. Maximum FT ement)	Edit F ts within the lo E available is	Properties E ogistics departr 17. If more is r	dit Members Custo ment with the priority needed, hiring will be	mise Page Text	Edit Field Co er	nfiguration	Edit Page La	ayout E	Edit Widgets		٩
Portfolio: Portfolio R&D (UP Name: Portfolio R&D (UK) Description: Fortfolio of the R&D departments Status: Status Description: Automated Reports Edit.	FORTES C	Portfolio Logistics Overview of all projec quarter. Maximum FT ement)	Edit F ts within the lo E available is	Properties E ogistics departr 17. If more is r	dit Members Custo nent with the priority needed, hiring will be	mise Page Text	Edit Field Co	nfiguration	Edit Page La	ayout	Edit Widgets	× A	٩
Name: Portfolio R&D (UK) Description: Portfolio of the R&D departments Status: Status Description: Automated Reports Edit	FORTES D	Portfolio Logistics Overview of all projec quarter. Maximum FT ement)	ts within the lo E available is	ogistics departr 17. If more is r	ment with the priority needed, hiring will be	and FTE required p required.	er						
Automated Reports Edit	Projects (Portfolio Manage	ement)											
				Edit New	Send report reques	t Save as versio	n Archive	Move	All Proje	cts		View Optio	ns 💌
Importance vs Risk	Name		Last Publisher	d Current Stage	e Project Man	ager(s)		Status	Planning Status	Hours Status	Costs Status	End Date	
	∛o⊱ Minsk				Ruud Peltze	r		•	•	•	•	12-Oct-201	0
Benorte	🖵 Venus			Preparation s	tage Peter Cole			•	•	•	•	28-Sep-201	10
Projects (Portfolio Management)	Zenith							•			•		
Products	Zone project		16-Apr-2010	Project initiati	ion Herman Mu	der					•	17-Sep-201	10
Issues								-		-			
Risks													
Changes	Previous versions							Remov	ve * All Prev	vious Ver	sions 🛛 🔻	View Optio	ns 🔻
Actions	Name	Saved On	Saved By	Remar	ks by Owner								
Lessons learned	January 2012	08-Mar-2012	Erik Aalbers	sberg									
Entries	February 2012	08-Mar-2012	Erik Aalbers	berg									
Timeline Penorte	Report Models									New	Import	Export Arc	hive
Timeline Reports	Name 🌢	Objective									import	LADOIL 140	inve
Linues	Monthly Report	Monthly Progre	ee Denort										
	Weekly Report	Weekly Progre	ss Report										
		riceita) riegie	oo reepon										

The portfolio dashboard

It's possible to define multiple portfolio models for different portfolios. Please refer to the section about

the Portfolio Model 26 for information about setting up and configuring models.

3 Functionalities

3.1 Project management

3.1.1 Project dashboard

The project dashboard is one of the most important windows, because it enables the project manager to monitor the progress of the project.

Home Portfolio Management Projectma	nagement Resource Allocation Time Entry Prince2 FAQ Project Plaza Im	iport / Export			Frik Aalbersberg 👻 Help Support Setup	•
Projectmanagement > IT Department > IT	Change project					-
Dashboard Properties - Product Brea	kdown Resource Management - Documents - Portfolio Re	port Reports Guide Plaza				
Project: Apollo Project	\bigcirc		Edit Properties E	dit Members	Pack Project Offline 🖉 🛔 Q	
Objective: Office 2010 Implementation Organisation: Peter Cole	Project opstart Project initiatie Stage 1 Stage 2 Stage Specificatie	3 Project af	sluiting	8		
Info:	Starting Up a Project	insging stage undaries	iject			E
FURIES	0	Project Board O Project Manager O Te	am Members			
Logs	Products		Edit Owner & Milest	tones Edit Pro	oject Plan Set Baseline + -	
	Project opstart					
	Project initiatie			(0		
Quality review log		Owner Start	Draft	Che J	P D I R Q C A	
C Change log 4	 Project business case 	Erik Aalbersberg 11-Jan-2	013	-	. 1	
Daily / Action log	 Project Initiatie Document (PID) 	Peter Cole 🗸	-	- 1	7-Jan-2013 1 3 3 1	
A baily relation log 10	 Project Autorisatie 	John Edwards 🗸	~	- *	/	
Minutes of meetings	Specificatio face					
Minutes of meetings	a specificatie lase	Owner Start	Draft	Checked F		
Automated Report	Behoeften inventarisatie (werkpakket)	Yung Ji-Lao 27-Jan-2	013	2	8-Feb-2013 3 - 1 2 -	
	Vragenformulier opgesteld	John Edwards 27-Jan-2	013	29-Jan-2013 V	- 11 1-	
	Formulieren verzonden	John Edwards 28-Jan-2	013	*	/	
Highlight Re	Intake-gesprek met eindgebruikers	Richard de Groot 01-Feb-2	013 05-Feb-2013	08-Feb-2013 2	8-Feb-2013 - 1	
My to do List		N 81				
10: printknopie op	Implementatie voorbereiding (werkpakket)	Yung Ji-Lao 15-Feb-	2013	0	I3-Apr-2013 - 1	
hoofdscher	Handleiding systeembeheer	Peter Cole 05-Mar-	2013	2	25-Mar-2013	
4: Budget 5 28-Apr-20	Instructie systeembeheer	John Edwards 28-Mar-	2013	0	13-Apr-2013	
wijziginge 7: Externe h	Handleiding aangepast	Herman Mulder 15-Feb-	2013	2	1-Feb-2013	
inschakelen	Installatie (door leverancier)	- 11-Feb-2	2013 -	- 1	5-Mar-2013 1 1	
	Pilot installatie	Peter Cole 24-Feb-2	2013	0.	12-Mar-2013	
	Installatie door systeembeheer	11-Feb-3	013	1	5-Mar-2013	
	Geteste installatie	- 11-Feb-2	2013	- 1	5-Feb-2013	
	-					
						-

Project dashboard

1. Tabs

The tabs are standard for each project. Depending on your organisation's license some tabs might not be available. The name of the tab indicates the content of the page:

- Properties	:	Includes all project properties including custom fields and portfolio information.
- Product breakdown	:	A decomposition of the products realised by the project. The tab gives a graphical representation of the breakdown.
- Plan	:	To set milestones and assign resources to the different products.
- Gantt	:	Overview of the project's hours and cost. Graphical representation of the project products/activities and export functionality to MS Project.
- Product Flow (add-on)	:	When the MS Project add-on is available you can integrate with MS Project. Furthermore the Product Flow Diagram is visible.
- Activity Planning (add-on)	:	When the MS Project add-on is available you can see the latest published project plan
- Resource Allocation (add-on):	When the Resource Allocation add-on is available, the Project Manager is able to request resources from resource pools. It also gives the Project Manager an overview of the requested and allocated resources.
- Documents	:	To manage project related documents the Project Manager can use the tab ' Documents'. This tab makes it easier to search for specific documents within a project. The tab gives you several options to search for documents.
- Portfolio Report (add-on)	:	When the Portfolio Management add-on is available and the Portfolio Manager has requested a report, the Portfolio Report tab will appear. The Project Manager can update the requested information on this tab and publish it to the portfolio.
- Reports	:	Report functionality about the products, cost / hour entries and resource assignments of the project.
- Guide	:	Explanation of the project in order of time (stage, products and templates)

2. General project information

In this field you will find the general project information such as; objective(goal), organisation (project team) and status. This information can be changed using the '**Edit**' button).

3. Logs

It gives an overview of the logs 62 that are used in a PRINCE2[™] environment. A counter is displayed for each log indicating the number of items there are for each log and if there are new items. The log is selected by clicking the name of the log.

4. Automated reports A list of all automated reports 2 available within this project.

5. My to do list

Overview of the actions that are assigned to you and their deadline. By clicking an action you obtain the additional information.

6. PRINCE2[™]

Here you see the PRINCE2[™] process model on which your project is based upon. The stage your project has reached is highlighted (yellow stage) and you can quickly go to the details of a stage by clicking a stage.

7. Product list Here you find the product planning concerned with the various stages and work packages.

- Functions at project level Here you can compose the project team (Edit members), edit the general project information (Edit see point 2), use the search function, make a print of the current page, inform the project members by email and export key project information to a zip file ('Pack project offline'). See the section about pack project offline for extra information.
- 9. Edit plan With the 'Edit plan' button you can design and modify your project plan. Furthermore you can

produce a product breakdown structure here. (See section product breakdown 33).

3.1.2 Planning a project

Project planning within the Principal Toolbox can be done by following these seven steps:

- Defining a product breakdown structure. 1.
- 2. Defining stages and work packages. 34
- Assign products to work packages. 38
 Planning the milestones of the project (basic 40 or advanced option 40).
- 5. Assign responsibilities for products 44
- 6. Assignment of budgets (hours and costs). [46]
- 7. Defining dependencies between products. 47

This sequence is just a suggestion. An iterative planning process is always possible; editing your project plan and other data remains possible throughout your project.

3.1.2.1 Creating a project

Projects are always created from a programme or project list dashboard. To create a new project do the following:

1. Go to the dashboard of the programme or project list.

Projects	New	Import	Export	Move	Model	Archive	* Dashboard		•	View Options -
		Currer	it Stage	Progre	SS	General	Planning Hours	Costs	Projec	ct Manager(s)

2. Click New in the Project listing heading. The window 'Add Project' appears.

roject properties		
lame:		
bjective:		
roject Model:	Klein Prince2 2009 project model	
roject Color:		
roduct Planning Type:	Principal Toolbox + Planning Export	
dd project members		
Project managers	Available users	
Erik Aalbersberg	Q Add Albert Swank	
	Romovo > Arjan van der Laan	
	Keniove	
	Henk Visser Herman Mulder	
Project board	Henk Visser Herman Mulder Ivo Rings Jan Jansen	
Project board	Henk Visser Herman Mulder Ivo Rings Jan Jansen Jeroen van Barneveld John Edwards	d
Project board	Henk Visser Herman Mulder Ivo Rings Jan Jansen Jaroen van Barneveld John Edwards Peter Cole Richard de Groot	d
Project board	Henk Visser Henk Visser Herman Mulder Ivo Rings Jan Jansen Jaroen van Barneveld John Edwards Peter Cole Remove -> Rud y Weerdenburg Rud y Weerdenburg	a
Project board	Henk Visser Herkan Mulder Ivo Rings Jan Jansen Janasen Janasen Janasen Jan Edwards Peter Cole Richard de Groot Ruud v. Weerdenburg Samuel Davies Sunoort Administrator	d g
Project board	Henk Visser Herman Mulder Ivo Rings Jan Jansen Jarasen Jarasen	d g r
Project board	Henk Visser Herman Mulder Ivo Rings Jan Jansen Jarasen Jarasen Jarasen Jarasen Jarasen Jarasen John Edwards Peter Cole Richard de Groot Ruud Pettzer Ruud V. Weerdenburg Samuel Davies Support Administrator Theo van Wirdum Yung Ji-Lao	d g r
Project board Project team members	Henk Visser Herman Mulder Ivo Rings Jan Jansen Jarcen van Barneveld John Edwards John Edwards Peter Cole Richard de Groot Ruud v. Weerdenburg Support Administrator Tom Maassen Yung Ji-Lao	d g r

Creating a new project

3. Fill in the appropriate data at 'Project properties':

i ili ili allo appropri		
Name	:	Project name
Objective	:	Short description of the project's objective
Project model	:	Select the project model on which the project will be based
Product planning	:	If the add-on Microsoft Project Client Integration is available, you have the choice to plan your project using MS Project. This adds the possibility (however much more complexity!) of activity based planning.

4. Scroll to the '**Add project members**' section and add the project manager from the list of ' Available users'. If known, you can add the other members as well. With the search option a specific user can be found easily.

Depending on your system settings, this page either shows you the roles project manager, project board and team members or it will show all PRINCE2 roles e.g. Senior supplier, project support, project assurance.

Add project members		1	
Project managers	Available users	Select project members	
Erik Aalbersberg	Q	Project Manager(s)	Available users
<- Add	Arian van der Laan	Peter Cole	٩
Remove ->	Hank Visser	<- A00	Albert Swank Arian van der Laan
	Herman Mulder	Remove	Erik Aalbersberg
	Ivo Rings	Project Support	Henk Visser Herman Mulder
Project board	Peter Cole	riget support	Ivo Rings
Jan Jansen	Richard de Groot	<- Add	Jan Jansen Jaroon von Parnevold
Jeroen van Barneveld	Ruud Peltzer	Remove	> John Edwards
John Edwards	Ruud v. Weerdenburg		Peter Cole
~~ Auu	Tom Maasson	Project Board - Executive	Richard de Groot Ruud Peltzer
Remove ->	Yung Ji-Lao	John Edwards	Ruud v. Weerdenburg
	rung of Euro	<- A00	Samuel Davies Support Administrator
		Remove	S Theo van Wirdum
·		Project Board - Senior User	Tom Maassen Yung II-Lao
		Erik Aalbersberg	Tung SPEad
Project team members		<- Add	
Samuel Davies		Remove	>
Support Administrator			
<- Add		Project Board - Senior Supplier	
		<- Add	
Remove ->		Remove	>
		Project Assurance	
		<- Add	
		Remove	>
		Tunoro	-
		User Group (optional)	
		- Add	
		~~ Auu	
		Remove	>
		Supplier Forum (optional)	
		<- Add	
		Remove	>
		Project Team - Team Manager(s)	
		Richard de Groot	
		~~ A00	
		Remove	1 I I I I I I I I I I I I I I I I I I I
		Project Team - Team Member(s)	
		Herman Mulder	
		Arjan van der Laan - Add	
		Ruuu v. vveerdenburg Remove -	>

Edit members; limited role set

Edit members; all PRINCE2 roles

5. By clicking '**OK**' the project will be created.

Note: Creating a new project can be done by the system administrator, and manager and readers of a programme / project list.

3.1.2.2 Defining a product breakdown structure

The definition of a product breakdown structure assists in thinking through the result of the project, i.e. the final product. The final product of a project is broken down into manageable parts in the product breakdown structure. These parts are called specialist products and can be both physical products as well as documents.

Note: Only project managers and project support can edit the project plan.

Stages are edited in the 'Edit Project Plan' window. Before starting any action, go to this window from

the project dashboard, product breakdown tab or plan tab, by clicking Edit Project Plan

The Edit Project Plan window - introduction

The 'Edit Project Plan' window is divided into two parts. On the left hand side you find the project plan, i.e. products that are present in your planning and on the project dashboard. On the right hand side you find an area where you can define new products, the product breakdown structure and work packages. In the Principal Toolbox, it is possible to have products defined and not use them in the planning. These can be kept in 'storage' on the right hand side of the window. See the remarks below for further explanation.

Three tabs are present on the right hand side of the window

Specialist: use this tab to define the product breakdown structure with amber colored specialist products.

Management: use this tab to organize the stock of management products.

- Blue products for the project manager,
- Green products for the project board (e.g. authorizations and decision points).

Work Packages: here you can define new work packages.

dit Project Plan			Save Cancel
New stage	New workpackage New spec	. product New man. product New man. product	t Copy products
Project plan	•	Specialist Management Work packages	
		Product Breakdown << >>	
Project opstart		Klant communicatie producten	
Project Mandate	New	- Voorbereiding	
Project Brief		Vragenformulier opgesteld	
Initiation Stage Authorisation		- Formulieren verzonden	
	Project plan	 Intake-gesprek met eindgebruikers 	
Project initiatie		Technische producten	
Project Initiatio		 Pilot installatie 	
Project busiless case		 Handleiding systeembeheer 	
Project Initiatie Document (PID)	Unassign	-Instructie systeembeheer	
Project Autorisatie		Distributie MS Office CD-ROMs	
	To rename, double-	 Installatie door systeembeheer 	
Specificatie fase	click on item.	- Geteste installatie	
Behoeften inventarisatie (werkpakket)		Uitrol naar Client PCs	
Vragenformulier opgesteld	To permanently remove items	- Implementatie producten	
Formulieren verzonden	drag them into the trash can.	-Handleiding aangepast	
Intake-gesprek met eindgebruikers		Gebruikerstraining	
Incolor and the constant and the foundation (Remove	Pilot implementatie	
Handlaiding eveloembahaar		 Instructie en begeleiding op werkplek 	
Instruction systeembeheer		Helpdesk opzetten	
Handleiding aangepast		- Gebruikersvaluatie	
Transiending dungepust		- Opstellen PAGs lijst	
Installatie (door leverancier)		• vragenuur	
Pilot installatie	m		
Installatie door systeembeheer			
Geteste installatie			
Highlight Report			
Go / No go			
	*		

Edit project plan

Some remarks about the mechanisms of this window.

- All products and work packages are shown on the right hand side of the window. If they are used in the project plan, they will be shown grey in the right half of the window. If they are <u>not</u> used in the project plan, they are colored (blue/amber/green) on the right hand side. You could consider the right hand side a (temporary) storage space for products not planned for delivery. This can be useful when templates or helpful texts are present you don't want to lose.
- Creating new stages / work packages / products is done by dragging them from the top of the window into either side of the window. Any of the items shown below can be dragged onto the project plan.

New stage	New workpackage	New spec. product	New man. product	New man. product	Copy products

Important: when placing an item, check your mouse pointer. A black line must show to create a new item. If no black line shows at your mouse pointer, move your mouse around until you see it appear.

- Creating new specialist products: drag them onto the product list. The tab 'Specialist' will come to front if it wasn't. Drop the new product when you see the black line appear.
- Deleting items: only products / work packages which are <u>not</u> used in the project plan (i.e. not present in the left half of the window) can be deleted. Deleting items is done by dragging them onto the trash can in the upper right hand corner.
- Select multiple items at once by clicking the first, then click the next item while keeping CTRL or SHIFT pressed. CTRL lets you select multiple items one by one, SHIFT will select all in-between lying items at once.
- Deleting stages is done by dragging the stage directly onto the garbage bin. Products and work packages present in the stage are retained on the right hand side of the window.

A detailed description of how to create or change the product breakdown is given in the next section.

3.1.2.2.1 Creating the product breakdown structure

Note: Only project managers and project support can edit the project plan.

If a product breakdown is already present, you can choose to either rename and re-order the products in the product breakdown, or you can delete the products from the present breakdown and start with an empty list.

- To rename items, double-click a colored product and enter the new name in the pop-up.
- If the product is grey, look it up in the project plan on the left side of the window and double-click the product there to rename.
- To delete products, they must not be present in the project plan. First drag them to the right hand side of the window, then onto the garbage bin.

- To add products, drag <u>Nw specialist prod</u> to the position you want to insert the new product. Check the mouse pointer, it must show a black line.
- Change the order of products by dragging them to the right position.
- To change the hierarchy, use the arrow buttons in the right hand corner. Be sure to be on the specialist tab.

Specialist	Management	Work packages	
Product B	reakdown	<	< >>
Project en	d product		
- Product	1		
- Produ	ct 1.1		
Produ	ct 1.2		
- Product	2		
- Produ	ct 2.1		
Produ	ct 2.2		

Product Breakdown

Move, delete and rename products:

- The order of the products in the list can easily be changed by dragging the specific product to the correct location.
- To remove a product from the product breakdown, click the product and drag it to the recycle bin.
- To change the name of the product, double-click the product and change the name.

How to assign products to stages and work packages is described in the next sections.

3.1.2.2.2 Graphical view of the product breakdown

After editing the product breakdown, a graphical overview of the product breakdown is shown on the tab 'Product breakdown' in your project.

1. Go to the tab 'Product Breakdown'.

2. On the left (Breakdown representation) you can select the view 'Graphical (All products)'. A view similar to the view beneath will be shown.



Product Breakdown Structure

Products which are not assigned to a work package are shown in grey (*and are not part of the project plan*). Products assigned to a stage and / or work package are shown in yellow.

Assigning products to stages and work packages is described in the next two sections.

3.1.2.2.3 Editing stages

Note: Only project managers and project support can edit the project plan.

Stages are edited in the 'Edit Project Plan' window. Before starting, go to this window from the project dashboard, product breakdown tab or plan tab, by clicking 'Edit Project Plan'.

•				Save	Cano
New stage	New workp	package New spec. product	New man. product New man. product	Copy p	roduc
roject plan	^		Specialist Management Work pace	kages	~~
Starting up a Droject	- 11		Project end product		
Droject Mandate		New	- Product 1		
Project Mandate			- Product 1.1		
Initiation Stage Plan			Product 1.2		
Initiation Stage Flan		Project plan	- Product 2		
Initiation Stage Autoonsation			Product 2.1		
			Product 2.2		
Initiating a Project		Unassign			
Business Case	-				
Project Initiation Documentation (PID)	=				
Project Authorization		To rename, double-			
Project Autorisation		click on item.			
Execution Stage 1		To permanently remove items			
Work Package 1		drag them into the trash can.			
Product 1.1					
Historia Deserva		Remove			
Flighlight Report					
Next Stage Plan					
non olugo i lun					
Next Stage Authorisation					
Next Stage Authorisation					
Next Stage Authorisation		â			
Next Stage Authorisation Execution stage 2 Work Package 2		Â			
Next Stage Authorisation Execution stage 2 Work Package 2 Product 1.2		Î			
Next Stage Authorisation Execution stage 2 Work Package 2 Product 1.2 Product 2.1		Î			
Next Stage Authorisation Execution stage 2 Work Package 2 Product 1.2 Product 2.1 Product 2.2		Î			
Next Stage Authorisation Execution stage 2 Work Package 2 Product 1.2 Product 2.1 Product 2.2 Highlight Report		Î			

Before editing stages, first open the 'Edit project plan' window.

Renaming a stage

To rename a stage, double-click its name. Edit the name in the pop-up.

Adding a stage

To add a stage to your project plan, drag 'New stage' from the top of the window (shown below) to the right position in your project plan (the left side of the window).

lit Project Plan				Save	Cano
New stage	New workp	New spec. product	New man. product New man. product	Сору	produ
Project plan			Specialist Management Work pac	kages	
	- É		Product Breakdown	<<	>>
Starting-up a Project			Project end product		
Project Mandate		New	- Product 1		
Project Brief			- Product 1.1		
Initiation Stage Play			Product 1.2		
Initiation Stage Automation		Project plan	- Product 2		
Initiation Stage Auto asation			- Product 2.1		
*	_		Product 2.2		
Initiating a Project		Unassign			
Business Case		ondoorgin			
Project Initiation Documentation (PID)	=				
Next Stage Plan		To rename, double-			
Project Authorisation		click on item.			
Execution Stage 1		To permanently remove items			
Work Package 1		drag them into the trash can.			
Product 1.1		Domovo			
Highlight Report		Remove			
End Stage Report					
Next Stage Plan					
Next Stage Authorisation					
Execution stage 2		_			
Work Package 2					
Product 1.2					
Product 2.1					
Product 2.2					
Highlight Report	-				

Add a stage by dragging 'new stage' into your project plan.

Moving stages

To move a stage, click its name and drag it to the right position. Check the black line indicating where the stage will be positioned.

Deleting a stage

To delete a stage, click its name and drag it right onto the garbage bin in the upper right hand corner of the window. If the stage contains products and/or work packages, these will be moved to their respective tabs on the right hand side of the window, so these will not be deleted.

	4 WORK	New Spee. product	New man. proc		w man, product	Сору	produc
roject plan			Specialist	Managen	nent Work pack	ages	
			Product Bi	eakdown		<<	>>
Starting-up a Project			Project end	I product			
Project Mandate		New	- Product	1			
Project Brief			- Produc	:t 1.1			
Initiation Stage Dian			Produc	:t 1.2			
Initiation Stage Fian		Project plan	- Product	2			
mitation Stage Autorisation			- Produc	:t 2.1			
			► Produc	at 2.2			
Initiating a Project		Unseeign					
Business Case		Unassign					
Project Initiation Documentation (PID)	=						
Next Stage Plan		To rename, double-					
Project Authorisation		click on item.					
Execution Stage 1		To permanently remove item	s				
Work Package 1		drag them into the trash can					
Product 1.1		Remove					
Highlight Report		indire in the second se					
End Stage Report							
Next Stage Plan							
Next Stage Authorisation							
Execution stage 2							
Work Package 2							
Product 1.2							
Product 2.1							
Product 2.2							
11000012.2	-						
Highlight Report							

Delete a stage by dragging it right onto the garbage bin.

3.1.2.2.4 Editing work packages

Note: Only project managers and project support can edit the project plan.

Work packages are used to assign multiple products to the same team (PRINCE2), or as a means of making a further subdivision in stages. Principal Toolbox uses them to calculate summarised start and end dates, and subtotals of costs and hours.

Note: empty work packages result in errors when the Principal Toolbox calculates progress on the project dashboard, so only use work packages with products inside (see the section planning products [38]).

Stages are edited in the 'Edit Project Plan' window. Before starting any action, go to this window from the project dashboard, product breakdown tab or plan tab, by clicking **'Edit Project Plan**'.
				Save	Canc
New stage N	lew workj	New spec. product	New man. product New man. product	Copy	produc
roject plan	*		Specialist Management Work par	ckages	
				<<	>>
Starting-up a Project		New	Project end product		
Project Mandate			Product 1 1		
Project Brief			Product 1.1		
Initiation Stage Plan		Protostalas	-Product 2		
Initiation Stage Authorisation		Project plan	Product 2.1		
			Product 2.2		
nitiating a Project					
Business Case		Unassign			
Project Initiation Documentation (PID)	=				
Next Stage Plan		To rename double-			
Project Authorisation		click on item.			
		To permanently remove items			
Execution Stage 1		drag them into the trash can.	>		
Work Package 1 Product 1 1					
Produce 1.1		Remove			
Highlight Report					
End Stage Report					
Next Stage Plan					
Next Stage Authorisation					
Execution stage 2		-			
Work Package 2					
Product 1.2					
Product 2.1					
Product 2.2					
Highlight Report	-				
rignight report					

Before editing work packages, first open the 'Edit project plan' window.

Renaming a work package

To rename a work package, double-click its name. Edit the name in the pop-up.

Adding a work package

To add a work package to your project plan, drag 'New work package' from the top of the window (shown below) to the right position in your project plan (the left side of the window). Alternatively, you can first define the work package in the right hand side of the window, and then drag it to the right position in your project plan.

New	Specialist Management Work packa Work packages	ages
New	k Package 1	
	rachage 1	
	Work Package 2	
	work Package 5	
Project plan		
Unassign		
To rename, double-		
click on item.		
To permanently remove items		
drag them into the trash can.		
Bomovo		
Remove		
m		
ш		
	Project plan Unassign To rename, double- click on item. To permanently remove items drag them into the trash can. Remove	Project plan Unassign To rename, double- click on item. To permanently remove items drag them into the trash can.

Add a work package by dragging 'new work package' into your project plan.

Moving work packages

To move a work package, click its name and drag it to the right position. Check the black line

indicating where the work package will be positioned.

Deleting a work package

To delete a work package, click its name and drag it to the work packages list on the right hand half of the window. Only work packages that are not present in the project plan anymore, can be deleted by dragging them from the right hand part of the window onto the garbage bin (step 2 in the figure below).



Deleting a work package: 1) drag it from the left part to the right hand part of the window. 2) Drag it from the 'work packages' tab onto the garbage bin.

3.1.2.2.5 Planning products

Stages are edited in the 'Edit project plan' window. Before starting any action, go to this window from the project dashboard, product breakdown tab or plan tab, by clicking **'Edit project plan**'.

Defining new products

You can find an explanation of <u>creating a product breakdown</u> in the appropriate section. The definition of management products works in almost the same manner. Drag 'New man. product' onto the right hand part of the window. Use the blue management products for products of the project manager (like the project plan, highlight reports etc.). The green management products are meant for the project board (e.g. project authorisation, next stage authorisations etc.).

Adding products to the project plan

Products are always added to stages, and optionally to work packages. To plan products, simply drag them from the right hand side of the window to the correct position in the stage or work package. Click the 'specialist' tab for products that are part of the product breakdown. Management products are found on the 'management' tab.

Products which have been placed in the project plan are grey in the product breakdown overview, or the management products overview. The way to set planning dates for your project is described in the chapter planning product milestones 3.

Hint: check the use of colors of products etc. in section the use of colours within projects and

Making a product mandatory

It is possible to make products mandatory. This means that a product is set in the project plan. A project manager is not able to change or delete the product. When a project manager wants to change the project plan the mandatory products are highlighted with a small lock. This immediately shows

which products are mandatory.

roject plan			
		Product Breakdown	<< >>
Starting-up a Project	New	Project end product	
Project Mandate		- Product 1	
Project Brief		Product 1.1	
Initiation Stage Plan		Product 1.2	
Initiation Stage Authorisation	Project plan	Product 2 4	
		Product 2.1	
Initiating a Project		11000012.2	
Rusiners Care	Unassign		
Project Initiation Documentation (PID)			
Next Stage Plan			
Project Authorisation	To rename, double-		
	CHCK OIT REIT.		
Execution Stage 1	To permanently remove items		
Work Package 1	drag them into the trash can.		
Product 1.1			
Hishight Depart	Remove		
End State Report			
Next Stage Plan			
Next Stage Authorisation			
Execution stage 2	<u> </u>		
Work Package 2			
Product 1.2			
Product 2.1			
Product 2.2			

Mandatory products in the project plan

The setting 'mandatory' is part of the product properties and therefore visible on the product page. A mandatory product within a project model can only be modified by the model owner and within an ongoing project by the system administrator.

To make a product mandatory, go to the product page of the product you would like to make mandatory. Click on **Edit** and check the box that says '**Mandatory**'. Then click on **Save** to save your changes.

General	Logs	Dependencies	Costs & Hours	Resource Demand						
Produ	ct: Pr	oject Initiati	ion Docume	ntation (PID)				Save	Cancel	Page Layout -
Name: Descrip Owner Owner: Review Particip Priority Mandat	otion: Group: er: bants: :		rroject Initiation Do ncludes project plan project Manager	sumentation (PID)	[[[[] [] [] [] [] [] [] [] [Start: Draft: Checked: Final: uration In Working lanning Status:	Planned date 	Actual dat	ie	

Making a product mandatory on the product page

By using this functionality correctly it is possible to increase the uniformity of the work flow and improve the overall grip on the projects.

3.1.2.3 Planning product milestones

Each product in the project has four milestones you can use to manage product delivery.

- Start: set the date work has to start on the product
- Draft: plan the delivery of a draft version
- Checked: set the end date for quality review
- Final: the planned date for delivery of the final version of the product.

Planning the milestones within the project can be done in two ways:

On the dashboard and plan tab : Set milestones individually on the project dashboard or 'Plan' tab. Add On the Gantt chart Add : Use the Gantt chart editor with 'drag & drop' functionality.

The option with dashboard and plan tab is more or less like working like an Excel sheet, using a table to fill out dates for your project. The Gantt chart option provides a graphical planning chart, which you can edit using 'drag & drop' functionality. We will explain the two options in the next two paragraphs.

3.1.2.3.1 Using the dashboard or plan tab

On the project dashboard and the **'Plan'** tab, dates can be set by use of the keyboard and by selecting them in a calendar with your mouse.

Dashboard	Properties -	Product Breako	lown Plan	Gantt	Resource Manag	emen	t - Documents -	Portfolio Report	t Reports	Guide					
Project:	Apollo proj	ect			-										
-															
Products														Save	Cance
			Owner		Reviewer		Participants				Start Planned	Draft Planned	Checked Planned	Fin	al Planne
 Project 	start-up										February	201	3 • X	22-	Jan-2013
 Project 	initiation										Wk M	TWTF	S S		
🗸 Ir	nitial Business Cas	e	John Edwar	ds	 Samuel Davies 	Ŧ	Richard Hammond, P	eter Cole			6 4	29 30 31 1 5 6 7 8	9 10	28-	Jan-2013
🗸 P	roject Initiation Do	cument	John Edwar	ds	 Jeroen van Barne 	eveld v	Samuel Davies, Rich	ard Hammond, Yur	ng Ji-Lao, Pe	ter Cole 🗸	7 11	12 13 14 15	16 17 20	13 04-	Feb-2013
• •	roject Authorisation	n	Samuel Day	ries	 John Edwards 	Ŧ				Ŧ	9 25 2	19 20 21 22 26 27 28 1	23 24	12-	Feb-2013
- Require	ements & Prototy	ping									10 4	5 6 7 8	9 10		
Р	ilot Preparation (Work Package)	Jeroen van	Barneveld	l	-				-	14-Feb-2013			27-	Feb-2013
	Requirements rep	iort	Yung Ji-Lao		•	.	Jeroen van Barnevelo	i			14-Feb-2013	18-Feb-2013	19-Feb-20	13 20-	Feb-2013
	Database configu	red	Samuel Dav	ries	•	-				-	17-Feb-2013			27-	Feb-2013
Р	ilot (Workpackag	e)	Peter Cole		¥						16-Feb-2013			01-	Mar-2013
	User instruction		Richard Har	nmond	▼	.					23-Feb-2013	-	-	01-	Mar-2013
	Pilot evaluation		Richard Har	nmond	•	-	Peter Cole			-	16-Feb-2013			01-	Mar-2013
н	lighlight Reports		Peter Cole		•	Ŧ					24-Feb-2013			01-	Mar-2013
N	lext Stage Plan		Yung Ji-Lao		•		Richard Hammond, S	amuel Davies		-	01-Mar-2013	01-Mar-2013		04-	Mar-2013
• N	lext Stage Authoris	ation	John Edwar	ds	▼	-					02-Mar-2013	-	-	05-	Mar-2013

Filling in the milestones on the 'plan' tab.

- 1. Go to the project dashboard or the 'Plan' tab.
- 2. Fill in the milestones for each products:
 - Start: set the date work has to start on the product
 - Draft: plan the delivery of a draft version
 - o Checked: set the end date for quality review
 - Final: the planned date for delivery of the final version of the product.

The use of these milestones is optional. Principal Toolbox uses start and end dates to calculate duration of the project, stages and work packages. Therefore it is recommended to use at least these milestones on each product.

3. Dates are changed by clicking the double dashes, or by clicking an already present planned milestone. Enter the date with your keyboard, or select the date in the calendar.

Note: If a milestone has finished (depicted by: \checkmark), you cannot change the date directly anymore. To change milestone data then, click the product name to open the product detail window. On the 'general' tab, you can delete or change the actual dates for each milestone.

3.1.2.3.2 Using the Gantt editor

A Gantt chart shows a timeline of your product with the product milestones. Because Gantt charts are simple to understand and easy to construct, they are often used by project managers.

To use the Gantt chart in your project, follow these steps.

1. From inside your project, click the **Gantt** tab. A Gantt chart will be shown with all stages, work packages, and products listed. When you haven't entered any planned dates (milestones) yet, the start date of the project will be set to the date of today and the duration of all products will be set according to the duration in the project model.

	>	Week	4			•	Nee	k 5				v	Veek	6				W	eek	7				We	ek	8			
Name		21-Ja	n-201	3		2	28-J	an-2		3		0	4-Fe	b-20)13			11	-Fel	-20	13			18-	Fel	b-20	13		
	Ī	ΜТ	w h	F	s	s I	иΤ	· v	/ Т	F	s	sΝ	ιT	w	Т	F S	s	м	Т	w	r F	s	s	м	Т	W	ΤF	: s	s
Project start-up		-																											
Project Mandate																													
Project Brief																													
/ Initiation Stage Authori	sati																												
Project initiation	Ĩ	,								-	_					-		-											
/ Initial Business Case					_																								
Project Initiation Docum	nent							D.																					
Project Authorisation											1	_			Ó			-											
Requirements & Prot	ot																	1			-	-		-				-	
Pilot Preparation (W	lo																					-						- 1	
Requirements report																	E	xteri	nal 🖷					Ó	Ô				
Database configured																													
Pilot (Workpackage)																												
User instruction																													
																							_	-		_			

2. To edit the Gantt chart, click Edit Gantt in the blue page header.

Note: Only <u>products</u> can be planned directly in Principal Toolbox. Stages and work packages are summaries of the products they contain, so these cannot be changed directly.

Note: To select products in the edit Gantt window, click the product name on the left of the window. To select multiple products, keep CTRL or SHIFT pressed while clicking multiple products.

- 3. On the next page the planning can be entered in two ways. In the left hand half you can enter dates by clicking the cells and using the calendars. Alternatively, you can use the graphical part of the window. Here, you can change duration and dates with your mouse by dragging the time lines of products.
- 4. First of all you need to define the start date of your project. To do so click . In the dialogue, select the start date. This can also be used to move a group of products to a specific start date. See the note above for info about selecting multiple products.
- 5. Set the date of the first product in every stage or work package by dragging this to the planned start date or use the button shown above. All products in this specific work package or stage will be moved automatically to this date.
- 6. The next step is to plan the products in this specific stage or work package individually:
 - a. To move the product forwards or backwards in time you need to place the cursor in the centre of the product bar, hold the left mouse button down and drag it to the correct position.
 - b. To alter the duration, you need to place the cursor on one of the sides of the product time-bar and drag the side in the desired direction.
- 7. To define the draft and checked milestones or to set dates in a calendar, you can use the left side of the 'Edit Gantt' window. After clicking in a cell, a pop-up shows a calendar where you can choose the date.

As soon as you have set the draft or checked milestones in the table on the left, they are shown in the timeline on the right. Now you can drag them with your mouse as well.

									<	>		W	eek	5				We	ek 6					We	ek 1	7				We	æk	8				1
	Name		art			Fin	al			Durati	on	28	-Jar	1-201	13			04-1	Feb-	2013	3			11-	Feb	-20	13			18-	-Fe	b-20)13			
												М	Т	W	ΓF	S	S	М	τV	۷T	F	S	s	М	T	w	τI	= 8	3 S	М	Т	w	Т	F	S S	
	Project start-up	31	-Dec	>-201	2	22-	Jan	-201	3		17																									
~	Project Mandate	31	-Dec	-2012	2	09-	Jan	-201	3		8																									
~	Project Brief	11	-Jan	-2013	3	16-	Jan	-201	3		4																									
~	Initiation Stage Authorisati	17	-Jan	-2013	3	22-	Jan	-201	3		4																									
	Project initiation	1	1.	muar			-	<u> </u>	2011		•	-				-									-											
~	Initial Business Case	ľ	Wk	M	,	r T	w	T	F																											
~	Project Initiation Document	-	1	31		1	2	3	4	5 6			(D)	Ċ																						
•	Project Authorisation		2	7		8	9	10	11	12 13	3									Ć)															
	Requirements & Protot		3	14	1	5	16	17	18	19 20																	-	-								
	Pilot Preparation (Wo		4	21	2	9	23 30	31	25	2021																	-	-								
	Requirements report		6	4	-	5	6	7	8	910	i												Ext	ern	al 🗣	-				0	ė					
	Database configured	[То	day	: 20	-Fel	p-20'	13																										
	Pilot (Workpackage)	16	-Feb	-2013	3	01-	Mar	-201	3		10																									
	User instruction	23	-Feb	-2013	3	01-	Mar	-201	3		5																									
	Pilot evaluation	16	-Feb	-2013	3	01-	Mar	-201	3		10																			-						
	Highlight Reports	24	-Feb	-2013	3	01-	Mar	-201	3		5																									
-		-	_		-	_	_	_			-	-	-		-	-			-	-	-	-	-		-	-	-	-		÷				-		_

- Editing the Gantt
- 8. To define dependencies between products, select two products and click **Add dependency**. This will create a finish-to-start dependency between the two products. To edit dependencies see the section <u>defining dependencies</u>. To delete a dependency use **Remove dependency**. Buttons:
- 9. If dependency conflicts exist in your planning you can use the 'Solve conflicts button': Let the products you want to be recalculated and click the button.



10.When the plan is finished, click the 'Save' button to save the changes made.

Note: inconsistencies or conflicts resulting from mutually depending products are indicated by coloured indicators. For their meaning, consult the use of colours in projects 18. For more help on dependencies, see defining dependencies 47.

Θ	Project initiation												
		Owner	Start	Draft	Checked	Final	P	D		R	Q	C	Α
~	Initial Business Case	John Edwards	~			~	-	-	-	-	-	-	-
~	Project Initiation Document	John Edwards	\checkmark	\checkmark	\checkmark	~	-	1	2	1	-	-	-
٠	Project Authorisation	Samuel Davies	~	11-Feb-2013		12-Feb-2013	-	-	-	-	-	-	-

3.1.2.3.3 Baseline support

To keep track of progress and changes in the original planning is can be very useful to work with baselines. It allows you to compare the current schedule with the baseline planning.

There are two possible baselines in the Principal Toolbox. You can set a planning as *Initial Baseline* or *Current Baseline*. Setting the baseline will copy the current product planning to the selected baseline for comparison when the project progresses.

Set Baseline

Save a planning as *Initial* or *Current baseline* by clicking **Set Baseline**. This button is available on the project dashboard, Plan and Gantt.

Edit Gantt 🛔 🔀	P	Set Baseline	Switch to MS Project Planning	Export to MPX	\mathbf{M}
		and the second			

Choose the baseline type (Initial or Current Baseline) to save the schedule.

Project Baseline	,
Set baseline Please select the ba planning to the select	aseline to set. Setting the baseline will copy the current product cted baseline for comparison when the project progresses.
Select baseline Baseline Type:	Current Baseline
OK Cancel	

Setting a baseline

View a Baseline

In the Gantt chart a baseline planning can be shown in the current plan. You can choose to show the Initial or Current Baseline in the actual Gantt.



Selecting a baseline



Baselines on the Gantt

3.1.2.4 Product page

Every product which is defined has a standard product page. In order to consult the detailed information concerning this specific product you click the product name in the project dashboard.

44

	on Stage Plan	Edit Change Picture Close Page Layout 🕶 Approval Settings Edit Widgets
Name:	Initiation Stage Plan	Planned Actual date
Description:	\frown	Start:
Owner Group:	Project Manager) \Box Draff: $-$ (2)
Owner:	- \'.	
Reviewer:	\mathbf{i}	
Participants:		Final:
Priority:		Duration In Working Days: 0.00
Mandatory:		Planning Status:
Nanning		
ercentage Comple	te:	
Helpful Text: A plan provides a sta	Itement of how and when objectives are to be	a achieved, by
Helpful Text: A plan provides a sta the major products, a of the plan. In PRINCE2 2009, th optional and may not Plan.	tement of how and when objectives are to be clivities and resources it requires for the scop ere are three levels of plan: project, stage an need to follow the same composition as a Pr	a achieved, by 3 d team. Team Plans are roject Plan or a Stage
telpful Text: A plan provides a sta the major products, a of the plan. In PRINCE2 2009, th optional and may not Plan.	Itement of how and when objectives are to be clivities and resources it requires for the sco ere are three levels of plan: project, stage an need to follow the same composition as a Pr	a achieved, by 3 Id team. Team Plane are roject Plan or a Stage 4 Add Add Not
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ielpful Text: A plan provides a sit the major products, a of the plan. In PRINCE2 2009, It optional and may not Plan. Networables emplates Name	Itement of how and when objectives are to be clivities and resources it requires for the scop erer are three levels of plan: project, stage an ineed to follow the same composition as a Pr Description	a achieved, by 3 d team. Team Plans are roject Plan or a Stage 4 Add Add Note Open Template Remove Show History Update Revision Published Publisher Merge
Idelpful Text: A plan provides a sta the major products, a of the plan. In PRINCE2 2009, th optional and may not plan. In PRINCE2 2009, th optional and may not plan. Idelpful Text Idelpful T	tement of how and when objectives are to be clivities and resources it requires for the scop ere are three levels of plan: project, stage an need to follow the same composition as a Pr Description Plan	a achieved, by 3 d team. Team Plans are roject Plan or a Stage 4 Add Add Note 5 Add Add Note Copen Template Remove Show History Update Merge V2.0 22-Jun-2010 Erik Aalbersberg ✓

Product page

On the 'Product page' there are some extra tab pages: Logs, Dependencies and Costs & Hours (not shown). The Logs tab allows you to register items such as: issues, risks and quality review $\boxed{62}$. On the Dependencies $\boxed{47}$ tab you can define dependencies between products to create a product flow. When the add-on 'Advanced Cost Registration' is available this tab is available for entering cost entries (See section cost administration).

General Logs Dependencies Costs & Hours Resource Demand		General Logs Dependencies Costs & Hours Resource Demand
Product: Project Initiatie Document (PID)	Edit Close 🗟	Product: Project Initiatie Document (PID) Edit Close
Name Description: Pages data bounnet (PG) Pages data pages data bounnet (PG) Pages data pages data bounnet (PG) Actual data pages data bounnet pages d		Name: Project Initiale Document (PID) Planned bit (Manual Description: Actual date (Manual Description: Owner (Cropp: Owner: Popet Manager If State: 24.569-2016 Owner (Cropp: Owner: Poter Cole If Charlt: - Participants: Richard & Greet, Yung J-Liae, Herman Mulder If Final: - Priority: Transit: Transit: *
		Planning Percentana Complete: 75%
Actions Edit New Remove V ! 🛍 🕼 Open Actions	View Options	Facetage complete. 13/
		Predecessors Add Depende
Issues Edit New Remove I Bit CBI * Open Issues Nr Description	View Options •	External prodecessors Edit Add Dependency Remove Depend Name e Project Start Draft Checked Frail Lag. Dependency Type Herd Step Plan Verson Project 03-July 2012 04-July 2012 </th
Risks New Copen Raks	View Options	Successors
Changes New * Open Changes	View Options	

Logs tab

Dependencies tab

3.1.2.5 Assigning responsibilities for products

Next step is to assign the responsible owners to the products in your project. This can be done by either the project manager or project support roles. Before you can assign products to project members, you have to make sure that all required resources are a member of your project (management) team.

Assemble your project team

- 1. Go to the 'dashboard' tab of your project.
- 2. Click 'Edit Members' to see the members of your project team. To add people to your project team, select them from the list on the right and click 'Add' at a specific role to assign them. Use the search option to easily find a specific user.

Depending on your system settings, this page shows you either the project manager, project board and team members, or it shows all PRINCE2 roles i.e. Senior supplier, project support, project assurance, etc. This can be changed by the system administrator.

Add project members					
Project managers		Available users	Select project members		
Erik Aalbersberg		Q	(Available users
	<- Add	Albert Swank	Project Manager(s)		Available users
	Remove ->	Arjan van der Laan	Peter Cole	<- Add	Albert Swank
		Henk Visser		Remove ->	Arjan van der Laan
		herman Mulder		Noniovo	Erik Aalbersberg
Project board		Peter Cole	Project Support		Henk Visser Hermon Mulder
Jan Jansen		Richard de Groot	r oject outpret		Ivo Rings
Jeroen van Barneveld		Ruud Peltzer		<- Add	Jan Jansen
John Edwards		Ruud v. Weerdenburg		Remove ->	Jeroen van Barneveld
	<- Add	Theo van Wirdum			Peter Cole
	Remove ->	Tom Maassen			Richard de Groot
	rionoro -	Yung Ji-Lao	Project Board - Executive		Ruud Peltzer Buud v. Weerdenburg
			John Edwards	<- Add	Samuel Davies
				Remove ->	Support Administrator
		J		Noniove	Theo van Wirdum
Project team members		ן ר	Project Board - Senior User		Yung lid ao
Samuel Davies			Erik Aalbersberg		Tung of Edo
Support Administrator				<- Add	
				Remove ->	
	<- Add				
	Remove ->		Project Board - Senior Supplier		
			Yung Ji-Lao	a Add	
				<- Auu	
				Remove ->	
		J			
			Project Assurance		
				<- Add	
				Remove ->	
				Numbre -	
			User Group (optional)		
				<- Add	
				Remove ->	
			Supplier Forum (optional)		
				~ Add	
				~~ A00	
				Remove ->	
			L		J
			Project Team - Team Manager(s)		ן 🗌 🗌 ר
			Richard de Groot		
				<- Add	
				Remove ->	
			Project Team - Team Member(s)		
			Herman Mulder	e- Add	
			Arjan van der Laan Ruud v. Weerdenburg	~~ AUU	
			Nadu V. Weeldenburg	Remove ->	
			Ľ		J

Edit members; setting 'limited set of roles'

Edit members; setting 'full set of PRINCE2 roles'

3. Click '**OK**' at the bottom of the window to save the changes.

Assign products to owners, reviewers and participants

- 1. Go to the '**Plan**' tab.
- 2. Complete following information for each product:

Owner	:	Owner/responsible for the product.
Reviewer	:	Reviewer of the product.
Participants	:	Participants at the product realisation.

Dashboar	d Properties - F	Product Breakd	lown Plan	Gantt	Resource Managemer	nt - Documents - Portfoli	o Report	Repo	rts Gu	uide					
Project	t: Apollo proje	ect									Edit Proje	ct Plan Set	Bas	seline	ė
Product	s						Edit		ĥ	* Stageplan		View Options	•	+	
			Owner		Reviewer	Participants				Start Planned	Draft Planned	Checked Planned	Fi	nal Plann	ned
Proje	ct start-up									31-Dec-2012			22	-Jan-201	3
- Projec	ct initiation														
~	Initial Business Case	•	John Edwards	5	Samuel Davies	Richard Hammond, Peter Cole				21-Jan-2013			28	3-Jan-201	13
1	Project Initiation Doc	ument	John Edwards	5	Jeroen van Barneveld	Samuel Davies, Richard Hamm	iond, Yung	Ji-Lao,	Peter C	ole 29-Jan-2013	29-Jan-2013	30-Jan-2013	04	1-Feb-201	13
•	Project Authorisation		Samuel Davie	s	John Edwards	-				03-Feb-2013	07-Feb-2013	-	12	2-Feb-201	13
- Requi	irements & Prototyp	ing													
	Pilot Preparation (W	Vork Package)	Jeroen van Ba	arneveld	Peter Cole	-				14-Feb-2013			27	7-Feb-201	13
	Requirements repo	ort	Yung Ji-Lao		-	Jeroen van Barneveld				14-Feb-2013	18-Feb-2013	19-Feb-2013	20)-Feb-201	13
	Database configure	ed	Samuel Davie	s						17-Feb-2013			27	7-Feb-201	13
	Dilat Official and a strength														
	Pilot (Workpackage	;)	Peter Cole							16-Feb-2013			01	I-Mar-201	13
	User instruction		Richard Hamn	nond						23-Feb-2013			01	I-Mar-201	13
	Pilot evaluation		Richard Hamn	mond	-	Peter Cole				16-Feb-2013		-	01	I-Mar-201	13
	Highlight Reports		Peter Cole		-	-				24-Feb-2013	-	-	01	I-Mar-201	13
	Next Stage Plan		Yung Ji-Lao		-	Richard Hammond, Samuel Da	vies			01-Mar-2013	01-Mar-2013		04	4-Mar-201	13
•	Next Stage Authorisa	ation	John Edwards	3		-				02-Mar-2013	-		05	5-Mar-201	13
<u> </u>													_		

Plan tab

By clicking on **Edit** and then clicking on the double dash a menu appears and you can select resources or dates. Selected resources and dates can be changed later in the same way.

The menu which assigns participants to a product also works in another way whereby more people can be added.

3. Select one or more members from the column on the right with your left mouse button (to select multiple members at the same time, keep the CTRL key pressed) and click the '<' key.

iohn Edwards Peter Cole	V V	James May Jeroen van Bameveld Richard Hammond Samuel Davies Yung Ji-Lao
OK Cancel		

Jeroen van Barneveld *

Jeroen van Barneveld John Edwards Peter Cole

Richard Hammond Samuel Davies

Yung Ji-Lao

James May

4. Click '**OK**' to assign the participants to the product. You can remove members by selecting them from the left hand row and then clicking the '>' key.

3.1.2.6 Assigning budgets

In the Principal Toolbox, product based planning takes a central place. Budgeting and cost registration is also product based, so all costs are calculated towards products.

Note: time, stage or project based costing is also possible in Principal Toolbox. In this case, dummy (management) products are added to the project plan (see <u>planning products</u> 38). In the case of time or project based costing, add the dummy products to the last stage of your project. This way, they stay visible throughout the project.

For the registration of both costs and hours, five types of registration are available:

- Budget : The approved budget
- Committed : Costs you will have to pay, e.g. a contract signed, but not yet invoiced
- Actual : Money or hours actually spent
- Remaining : An estimate of costs or hours necessary to complete the product.
- Variance : The variance relative to the budget.

Formula: variance = (committed + actual + remaining) - budget

Below you'll find the steps to set the budget for your project.

- 1. Go to the 'Plan' tab.
- 2. In the pull down menu select **Costs manual** or hours manual.

- 3. Click the Edit button and fill in the budget in the field 'Hours budget manual' (hours) and 'Cost budget manual' (costs). Fill in 'Hours remaining manual' and 'Cost remaining manual' with the same value of hours and costs. By doing this you keep the 'variance' with respect to the budget, at the start of the project at 0. As the project progresses you can see at 'variance' the number of hours or costs over or under the budget.
- 4. Alternatively, go to the each product page and click the tab **Costs & Hours** and insert the different budgets there.

Dasht	oard Properties - Product Breakd	town Plan Ga	intt Resource	e Management	- Document	is - Portfolio	Report Reports	Guide													
Proj	ect: Apollo project							Edit Project Plan S	et Baseline	۵	1										
Prod	ucts				E	at 🗱 🎼	Costs total	▼ View Option	15 - 4		1										
		Costs Budget	Costs	Costs Actual	Costs C	osts Variance															
ŧ Pi	roject start-up	(0.00)	(0.00)	(0.00)	(0.00)	(0.00)					General Logs Depe	ndencies Co:	sts & Hours R	esource Dem	and						
(-) P	roject initiation										Product: Projec	t Initiatie D	ocument (F	PID)						Edit	Close 💆
1	Initial Business Case	1,000.00	0.00	400.00	700.00	100.00															
1	Project Initiation Document	9,000.00	320.00	19,080.00	0.00	10,400.00					Hours	Manual	Entries	Total		Costs	Man	ual	Entries	Total	
٠	Project Authorisation	0.00	0.00	0.00	0.00	0.00					Budget:	800.00	0.00	800.00		Budget:	32,500.0	10	0.00	32,500.00	
⊡ R	equirements & Prototyping	(10,000.00)	(320.00)	(10,400.00)	(100.00)	(10,300.00)					Committed: Actual:	0.00	0.00	0.00		Committed: Actual:	0.0	10	0.00	0.00	
	Pilot Preparation (Work Package)										Remaining:	0.00	030.00	030.00		Remaining:	3,000.0	10	50,670.00	53,670.00	
	Requirements report	2,100.00	0.00	262.50	2,000.00	162.50					Variance:	0.00	0.00	0.00		Variance:	0.0	10	0.00	0.00	
	Database configured	0.00	0.00	0.00	0.00	0.00					Turnun con			-164.00		- and - and -				21,370.00	
		(2,100.00)	(0.00)	(262.50)	(2,000.00)	(162.50)															
	Pilot (Workpackage)																				
	User instruction	15,000.00	0.00	0.00	15,000.00	0.00															
	Pilot evaluation	2,400.00	0.00	0.00	2,400.00	0.00					Planning December 2 Comple	- 752									
		(17,400.00)	(0.00)	(0.00)	(17,400.00)	(00.00)					Percentage Comple	æ. /5%									
	Highlight Reports	0.00	0.00	0.00	0.00	0.00															
	Next Stage Plan	0.00	0.00	0.00	0.00	0.00					Cost / Hour Entries	isting			Edit	New Cost / Hour Entry	G (1	Q 8	* All entries	- N	/iew Options -
•	Next Stage Authorisation	0.00	0.00	0.00	0.00	0.00					Description	Type	Appro	ival Status	Hours	Owner	Creator		Book Date 🌲 Ren	marks by Owner	
1		(19,500.00)	(0.00)	(262.50)	(19,400.00)	(162.50)					Support	Actual	Appro	eved	1	0.00 Erik Aalbersberg	Erik Aalbersb	erg	09-Apr-2010		
										_	Tech Data	Actual	Appro	wed		2.00 Erik Aalbersberg	Erik Aalbersb	erg	09-Apr-2010		

Costs & Hours on a project level

Costs & Hours on a product level

Using description above gives an overview of your project costs and hours in tabular form. If you want to keep track of history or the construction of the numbers on the page, the Principal Toolbox has the option of cost and hour entries. If these are available within your organisation, you will find a section **'costs / hours listing'** on each product page, on the 'Cost & Hours' tab, as shown below. See the section working with cost entries for more information.

General	Logs	Dependencies	Costs & Hours	Resource Demand	d			
Produ	ct: Pr	oject Initiati	e Document	t (PID)				Edit Close 💌
Hours		Manual	Entries	Total	Costs	Manual	Entries	Total
Budge Commi Actual: Remain Varian	t: itted: : ning: ce:	800.00 0.00 0.00 0.00	0.00 0.00 636.00 0.00	800.00 0.00 636.00 0.00 -164.00	Budget: Committed: Actual: Remaining: Variance:	32,500.00 0.00 3,000.00 0.00	0.00 0.00 50,870.00 0.00	32,500.00 0.00 53,870.00 0.00 21,370.00
Planning Percen Cost / H Descripti	tage Co lour Er	omplete: 7: htries listing Type	5% e A¢	proval Status H	Edit New Cost / Hour Entry tours Owner	Creator	* All entries Book Date 🔶 Re	View Options
Support Tech Dat	ta	Actu	al Ap al Ap	proved	10.00 Erik Aalbersberg 2.00 Erik Aalbersberg	Erik Aalbersberg Erik Aalbersberg	09-Apr-2010 09-Apr-2010	

3.1.2.7 Defining dependencies

The easiest way to define dependencies within your project is by using the <u>editable Gantt</u> $\[Ac]$. Dependencies created on the Gantt chart are inserted as 'finish-to-start' relationships. To modify the dependency type or to define dependencies with products from other projects (inter-project dependencies) you need to open the product details (from the project dashboard, plan or costs & hours tab) and go to the 'Dependencies' tab.

1. Click the name of the product you want to create a dependency for, and select the tab **'Dependencies**'.

General Logs	Dependencies	Costs & Hours	Resource Demand								
Product: Pr	oject Initiati	e Document	(PID)						Edit	Close	
Name:	Ρ	roject Initiatie Docu	ment (PID)			Plann date	ed	Actual date			
Owner Group: Owner: Reviewer: Participants: Priority: Mandatory:	역 J R 및	roject Manager leter Cole ohn Edwards lichard de Groot, Y	ung Ji-Lao, Herman Mulder	Dur Plan	Start: Draft: Checked: Final: ation In Worki	11-Jan-2 17-Jan-2 ing Days:	2013 26 2013 5.00	3-Sep-2006			
Planning Percentage Co	omplete: 7	5%							Add	Depende	
									7100	Dopondo	
External prede	cessors						Edit	dd Dependency	Remove	Depende	incy
Name Next Stage Plan		Project Venus Proje	ct	Start 03-Jul-2012	Draft 	Checked	Final 09-Jul-201	Lag Depend 2 gFinish-to	ency Type o-start		
Successors											

Dependencies tab in the product detail window

2. On this tab you can add 'Predecessors', from your project and from external projects. Click Add to select one or more 'Predecessors'. Then select the project and the product which are the 'Predecessors' and define the type of relation, options are:

Finish-to-finish:	Product (B) cannot be finished until product (A) has been finished. For example, if you have two products, "Wiring" and "Installation inspected", "Installation inspected" cannot be finished until "Add wiring" has been finished.	A B	
	Work on product (B) cannot start until product (A) has been finished. For example, if you have two products. "Constructed fence" and	A	
Finish-to-start:	"Painted fence", "Painted	В	
	fence" cannot be started until "Constructed fence" has been finished. This is the most common type of dependency. Product (B) cannot be finished		
	until work on product (A) has		
Start-to-finish:	been started. The Predecessor must be started	R	
	before current product can finish.	-	
	Work on product (B) cannot start until work on product (A) starts. For example, if you		
Start-to-start:	have two products,	A	
	"Concrete levelled", "Concrete	D	
	levelled" cannot begin until "Foundation poured" begins.		

3. Click **OK** to create the relationship.

Note: only predecessors can be defined. This way, a project manager cannot make another

project dependent on his or her own project. To define successors, the project managers have to cooperate.

4. The type of the dependency and the lag (delay) can be modified on the main page. Lag is a delay between products that have a dependency. For example, if you need a two-day delay between the finish of one product and the start of another, you can establish a finish-to-start dependency and specify two days of lag time.



Adding a dependency

The relationships are verified based on the start and end date of the products. If an end date of a ' Predecessor' is delayed or planned later than the start date of the 'Successor' and the relation is defined as; Finish-to-Start, a blue traffic light is shown to indicate a problem.

	Highlight Reports	Peter Cole			24-Feb-2013		 01-Mar-2013
	Next Stage Plan	Yung Ji-Lao	-	Richard Hammond, Samuel Davies	01-Mar-2013	01-Mar-2013	 04-Mar-2013
•	Next Stage Authorisation	John Edwards			02-Mar-2013		 05-Mar-2013

Dependency on the project dashboard

External dependencies

External dependencies are represented in the projects Gantt diagram. These are represented with a big dot and the word 'external'. To see details of the dependency; place your mouse on the dependency and a pop-up screen will show the details.



Dependencies on the Gantt

On programme level these inter-project dependencies are also represented so the programme manager can see bottlenecks in the execution of the programme.

See the screenshots below:

Dashboard Prop	erties 👻	Gantt	& Depe	endenci	ies B	enefits	Monito	r Do	cumen	ts & Ki	nowled	lge N	lodels	Archi	ve										
Project list: (Quality	and /	Orga	nisat	ion p	rojec	cts															ē		F	
This Gantt show	vs projec	ts and ti	neir pro	ducts v	/ith inte	er-proje	ect depe	enden	cies or	high p	riority.														
Subprogramme	is are inc	luded w	ith their	start a	nd end	date.																_			
	Timescale: Quarters 💌																								
		12			In	00.12				lon 1				Eat	- 12			14	or 12						
Nerre	>	harae	hara7	harao	havao	ha/60	ha/51	ME2	hara	Jan I.	haro	hara	have	hais	har7	haro	haro	hA/10	har13	14/10	ha/12	harta	hA/15	ha/18	ha/17
Name		12	10	08	0.0	10	47	24	24	07	14	24	20	04	44	10	26	04	14	10	25	04	00	15	22
Quality and Orga	anisati	12	19	20	00	10	17	24	51	07	14	21	20	04	<u> </u>	10	20	04		10	23		00	19	22
Apollo project									-																
Requirements re	eport												E	sternal	→	0									
Juno Project															1										
Venus project						-			-				-												
Roadshow																									
Zeus Project																									
 Project Mandate 	e																								

Dependencies on the programme Gantt

If for some reason the Office relocation project is delayed or planned later the Gantt will indicate that there is a problem with the planning.



Dependencies on the programme Gantt

3.1.2.8 Requesting resources

The Project Manager is able to request resources to staff his project. Resources can be requested as skill, or, if the project manager has a specific preference, as 'named' resources. Before a project manager is able to request resources from a resource pool, a pool or multiple pools have to be linked to the project.

How a Project Manager links a resource pool to his project and how a he or she requests resources van be found at <u>'Requesting resources within a project'</u> [116].

Note: To be able to request and allocate resources, the Resource Allocation module needs to be available!

3.1.3 Managing a project

During the execution of a project the defined products are to be realised. In this section you will find:

- How to monitor and enter progress.
- How to communicate with Principal Toolbox.
- Ways of composing reports and views.
- How documents/templates are managed.
- How issues and risks are registered and monitored.
- How to use the hours entry module.

3.1.3.1 Progress: Planning

You are able to get an easy overview of the progress of the project on the project dashboard. Immediately visible are:

- delayed and finished products
- the number of issues, risks etc. within your project and per product or work package.
- · deliverables added to products, etc.

On the dashboard:

Θ	Project initiation												- 1
		Owner	Start	Draft	Checked	Final	P	D		R	Q	C	A
✓	Initial Business Case	John Edwards	\checkmark			~	-	-	-	-	-	-	-
~	Project Initiation Document	John Edwards	\checkmark	\checkmark	~	\checkmark	-	1	2	1	-	-	•
•	Project Authorisation	Samuel Davies	~	11-Feb-2013		12-Feb-2013	-	-	-	-	-	-	-

Planning on the project dashboard

- Planned dates set on today or before today are shown in red.
- If the final planned date lies before today a red dot appears to the left of the product name.
- Finished milestones are marked with a tick: ✓. If the final milestone is ticked off, the tick is shown to the left of the product name.

On the Gantt chart;

	>				M	/eek	:2				We	ek	3				Wee	k 4	
Name		2012	2		0	7-Ja	n-201	3			14-	Jar	1-201	3			21-J	an-2(013
		T	F	s	SM	ΙT	WΤ	F	s	s	М	Т	wτ	F	s	s	ΜТ	W	Т
Project start-up																			
Project Mandate					(
Project Brief																			
Initiation Stage Author	sati										_								
Project initiation																-		٩	
Initial Business Case																			
Project Initiation Document	nent											D)	Ċ						
Project Authorisation																	0		

Planning on the Gantt chart

- If the final milestone of the product is delayed a red dot appears next to the product name.
- If milestones of the product have been finished, this is shown in the planning with a solid colour bar inside the product bar. (In the figure shown above, the draft version of the Initiation Stage Plan has been finished)
- Finished products are marked with a tick (✓) and the solid bar indicates when the product actually has been finished (e.g., in the figure above, the Project Mandate was finished on the 25th of May, but was scheduled to finish on the 21th).

To report progress you do the following:

- 1. Go to the 'Project Dashboard'.
- 2. Click the name of the product to view the 'Product page'.
- 3. To change the planned date, select the date and enter the new date in the calendar.

4. To register passing of milestones, tick the checkbox for Start/Draft/Checked/Final. The date will be set to today by default, alternatively enter another date in the column 'actual date'.

		Save Cancel
Planned date	Actual date	
05-Mar-2013	13-Feb-2013	
13-Mar-2013		
19-Mar-2013	-	
25-Mar-2013		
ng Days: 15.00		
	Planned date 05-Mar-2013 13-Mar-2013 19-Mar-2013 25-Mar-2013 ng Days: 15.00	Planned date Actual date 05-Mar-2013 13-Feb-2013 13-Mar-2013 19-Mar-2013 25-Mar-2013 19 Days: 15.00

Planning on the product page

5. Passing a milestone can also be marked directly on the project dashboard. To do this click the appropriate milestone date next to the product and tick it off using the tick sign.

3.1.3.2 Registration of actual hours

Registration of hours in the Principal Toolbox can be done in multiple ways, depending on the available add-ons:

- Manual entry of aggregated hours per product (no add-on required).
- Enter hours using hour entries. This way you can keep track of history and the build-up of the number of actual hours shown (requires add-on 'Advanced Cost Registration').
- Time entry with the Principal Toolbox add-on 'Timesheets'. Users of Principal Toolbox get a weekly time sheet on which they can enter their actual spent hours (requires add-on 'Timesheets').

System administrators and time sheet managers, check '<u>Configuration of time entry</u> [113]' for more information about possible configurations.

3.1.3.2.1 Filling in time sheets (add-on)

When users of Principal Toolbox have been added in the module 'Timesheets', they get a weekly time sheet on their home page:

Му ор	en time sheets				
Week	Start Date 🌲	Owner	Time Sheet Status	Remarks by Owner	Time Entry Group
	6 04-Feb-2013	Erik Aalbersberg	New		ICT
	7 11-Feb-2013	Erik Aalbersberg	New		ICT

By clicking the date of the time sheet, the time sheet opens. On it you will find the selection of products you are allowed to book hours on. The selection of products that is shown is dependent on the settings of your 'time entry group'. It could be, that only products are shown of which you are owner, reviewer or participant. Alternatively, only products with an hours budget can be shown on time sheets.

In both cases, you can add the number of hours in the row of the appropriate product, in the column of the correct day. The total number of hours for each product, day, and week is shown directly on screen.

At the bottom of your time sheet, you find a selector for projects and non-project activities. Here you can select products or activities that are not shown in the product list.

After finishing your time sheet, you need to request approval on the data you entered. How this works

is described in the <u>next section</u> 53° .

Time sheet 04-Feb	-2013 - 10-Feb	2013 (Erik	Aalb	ersbe	rg)						Save	Save and Reque	st Approval	Cancel
Owner:	Erik Aalbersberg						Time En	try Gro	oup:	ICT				
Time Sheet Status:	New New						Time Sh	ieet Ap	prover((s): Ruu	d v. Weerdenburg	1		
Last Saved By:							Remark	s by A	pprover	r/				
Total Hours:	12.00						Group N Remark	Aanage s by O	er: wner:					
Minimum Hours:	38.00							, -						<u></u>
Start Date:	04-Feb-2013													
End Date:	10-Feb-2013													
Correction Time Sheet:	-													
Project	Product / Activity	Hours Actual	Mon 4	Tue 5	Wed 6	Thu 7	Fri 8	Sat 9	Sun 10	Totals	% Complete Re	marks	Remarks by A	pprover
General														
Venus Project (Albert S	Project Initiation Doc	ui 0.00	4.00			6.00				10.00	•			
Apollo project (Arj • Make selection •				2.00][5			2.00	J +			
			4.00	2.00	0.00	6.00	0.00	0.00	0.00	12.0)			

Timesheet

Principle of time sheets and hour entries

Time sheets need to be approved, otherwise the hours and associated costs will not be accepted. After approval of the time sheet, the fields of the time sheet will be added to the appropriate products in the form of a so called cost/hour entry. These entries are visible to the project manager from the product detail page. They provide an overview of the different bookings that have been made on products and allow to see which user worked how many hours on what date on which product.

3.1.3.2.2 Time sheet approval (add-on)

For the requester

After filling in the time sheet, you need to request approval. This is done with the 'request approval' button. The approval request is automatically delivered to the approvers.

Note: only approved hours will be taken into account in the project costs & hours overview. Before approval, they are not visible in projects or products.

If a time sheet has been disapproved, it will re-appear on your home page with status 'disapproved'. To see why it was disapproved, open the time sheet and click **Status** to see any remarks of the (dis)approvers. You can make any necessary changes and request approval again.

At the section **'My open time sheets'** on your home page, you will find an overview of your time sheets with the approval status. Here, you can access approved time sheets. Note the view selector on this tab, this defines which time sheets are visible.

For the approver

Check the section 'Configuration of time entry 113'.

3.1.3.3 Reporting

Within the Principal Toolbox you can make progress information available and generate reports. In this section the various options will be presented.

3.1.3.3.1 Portfolio reporting (add-on)

If and when the project manager is expected to report project status information back to the Portfolio, a reporting request will be sent and appear on the project. The request is found within the project on a separate tab with name "**Portfolio Report**". The report layout is based on the reporting model as defined on the portfolio. To supply the requested information the project manager follows these steps:

1. Within the project, select the tab "Portfolio Report" and press the "Edit" button

Dashboard	Properties -	Product Breakdown	Plan	Gantt	Resource Management 👻	Documents -	Portfolio Report	Reports	Guide	Plaza				
Apollo P	roject												Save	Cancel
Portfolio:											Last Published On:			
		Portfolio ICT (NL)										28-Feb-2011		
Due date:		29-Jan-2013									Last Published By:	Erik Aalbersberg		
Report Stat	tus:										Request Remarks:	-		
		•												
Forecast st	art date:	01-Jan-2013												
Properties														
General														
Name:		Apollo Project												
Project Mar	nager(s):	Peter Cole												
Start Date:		1 0101 0 010												
Ford Dates		28-Dec-2012												
End Date:		03-Apr-2013												
Progress														
Tijd:							Status (Tij	d):						
Geld:		•					Status (Ge	ld):						
		•					Status (Pia	inning):						
Planning:							Status (Re	sources).						
Resources:		•												
		•												
Financial														
Budget:		150,000.00		Actua	11:	100,000.00	ETC:			7	EAC:	175	000.00	

The porfolio report is to be filled out by the project manager

- 2. Update the editable fields with the latest information, and press the "Save" button
- 3. Then press the "Publish to Portfolio" button to send the information off to the portfolio.
- 3.1.3.3.2 Copying data

Within the Principal Toolbox there are two options to copy a specific view to another application. Options are:

- Copy to clipboard.
- Save list to RTF.
- Save list as XLS.

Copy to clipboard

The 'Copy to clipboard' function is a quick way to export the information shown on the current page to another application (e.g. email).

- 1. Click the button.
- 2. Then open the file you want to paste the information into. Choose **Paste** and arrange the document composition yourself.

Note: The 'Copy to clipboard' function only works in Internet Explorer, not in FireFox or Chrome. For these browsers, use the RTF or XLS function instead. **Note**: Some applications empty the clipboard when they are started. In that case, first open the application and only then copy the information.



Save list as RTF

The 'Save this list as RTF' function creates a so called RTF (rich text format) file which can be opened in MS Word.

- 1. Click the button.
- 2. The web browser opens a pop up for opening or saving the RTF list.

Do you want to open or save Listing.rtf from asp.fortes.nl? Open Save 🔻 Cancel 🗙	F						
		Do you want to open or save Listing.rtf from asp.fortes.nl?	Open	Save	•	Cancel) ×

Note: This is the Internet Explorer behaviour. For other browsers the downloaded file may appear differently.

3. When clicking the **'Open'** button, MS Word will automatically be opened and the data is available for further modification.



The 'Save this list as XLS' function creates a so called XLS file which can be opened in MS Excel.

- 4. Click the utton.
- 5. The web browser opens a pop up for opening or saving the Excel list.
- 6. When clicking the **'Open'** button, MS Excel will automatically be opened and the data is available for further modification.

3.1.3.3.3 Generating automated reports

The Principal Toolbox has extensive report functionality available. These reports come either as RTF-files (readable by all text processors, like Word, WordPerfect) and Microsoft Excel files.

Within the Principal Toolbox a number of fixed keywords are available which you can use in your templates. When generating a report these keywords will be replaced by information from the Principal Toolbox database.

All views defined in the Principal Toolbox (general and personal) are available for reporting.

1. Go to the '**Project Dashboard**' or go to a specific product page where a merge template is available.



On the Project Dashboard

Templates		Add	Add Note	Open Tem	plate Remove	Show History	Update
Name	Description		Revision	Published	Publisher	Merge	
Highlight_Report.rtf	Highlight Report		v 2.0	22-Jun-2010	Erik Aalbersberg	~	

On the product page

- To generate a report with the project actuals, click the name of the report at the heading ' Automated Reports' or at the product page.
- 3. After the report is opened in a new screen it can be altered and then saved. In order to make the report available to the project team it is necessary to upload it in the Principal Toolbox (see the next section, <u>Adding documents</u> 5).

File Home Insert Pagel	Hoofdpuntenra Layout References Mailings	pport [Compatibi Review Vie	ility Mode] - Mi w Add-Ins	crosoft Word Acrobat				× 0
Arial 11 *	A [*] A [*] Aa [*] ℬ : :: * ::: * ×' ⋒ - 塾 - <u>A</u> - ::: ::: ::: ::: ::: :::::::::::::::	·元· 建建 ■ 建· 盈	2↓ ¶ Αα • ⊞ • Ε	aBbCcL Aal	BbCcDc AaBbCc Normal Strong	ta	A Find * ab Replace Select *	
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4	Status next period							
-	1.2 FIGURES to be delivered							
	Name	Owner	Final Planned	Hours Variance	7			
	Name Intake-gesprek met eindgebruikers	Owner Richard de Groo	Final Planned t28-Feb-2013	Hours Variance 327.15	-			
	Name Intake-gesprek met eindgebruikers Handleiding aangepast	Owner Richard de Groo Herman Mulder	Final Planned t28-Feb-2013 21-Feb-2013	Hours Variance 327.15 0.00				
	Name Intake-gesprek met eindgebruikers Handleiding aangepast Geteste Installate	Owner Richard de Groo Herman Mulder	Final Planned 128-Feb-2013 21-Feb-2013 15-Feb-2013	Hours Variance 327.15 0.00 44.00				
	Name Intake-gesprek met eindgebruikers Handleiding aangepast Geteste installatie Highlight Report	Owner Richard de Groo Herman Mulder	Final Planned t28-Feb-2013 21-Feb-2013 15-Feb-2013 23-Feb-2013	Hours Variance 327:15 0.00 44.00 0.00				
	Name Intake-gesprek met eindgebruikers Handleiding aangepast Geteste Installatie Highlight Report Go / No go	Owner Richard de Groo Herman Mulder Yung Ji-Lao	Final Planned t28-Feb-2013 21-Feb-2013 15-Feb-2013 23-Feb-2013 22-Feb-2013	Hours Variance 327.15 0.00 44.00 0.00 0.00				
	Name Intake-gesprek met eindgebruikers Handleiding aangepast Seteste instalialie HighlightReport Go / No go Vragenuur	Owner Richard de Grooi Herman Mulder Yung Ji-Lao	Final Planned 128-Feb-2013 21-Feb-2013 15-Feb-2013 23-Feb-2013 22-Feb-2013 15-Feb-2013	Hours Variance 327.15 0.00 44.00 0.00 0.00 0.00				
	Name Intake-gesprek met eindgebruikers Handleiding aangepast Geleste installatie Highlight Report Go / No go Vragenuur Highlight Reports	Owner Richard de Grooi Herman Mulder Yung Ji-Lao Yung Ji-Lao	Final Planned 28-Feb-2013 21-Feb-2013 15-Feb-2013 23-Feb-2013 22-Feb-2013 15-Feb-2013 15-Feb-2013	Hours Variance 327.15 0.00 44.00 0.00 0.00 0.00 0.00 0.00				
	Name Intake-gesprek met eindgebruikers Handleiding aangepast Gefeste installaite Hiphight Report 50 / No go Vizagenuur Hiphight Reports Next Stage Authorisation	Owner Richard de Groo Herman Mulder Yung Ji-Lao Yung Ji-Lao John Edwards	Final Planned 128-Feb-2013 11-Feb-2013 13-Feb-2013 12-Feb-2013 15-Feb-2013 15-Feb-2013 15-Feb-2013 15-Feb-2013 15-Feb-2013	Hours Variance 327.15 0.00 44.00 0.00 0.00 0.00 0.00 0.00 0.				
	Name Intake-gesprek met eindgebruikers Handleiding aangepast Gefeste installaite Highight Report Go / No go Vragenuur Highight Reports Highight Reports Heindest Repo	Owner Richard de Groot Herman Mulder Yung Ji-Lao Yung Ji-Lao John Edwards	Final Planned 128-Feb-2013 21-Feb-2013 15-Feb-2013 22-Feb-2013 15-Feb-2013 15-Feb-2013 15-Feb-2013 26-Feb-2013 26-Feb-2013 26-Feb-2013	Hours Variance 327.15 0.00 44.00 0.00 0.00 0.00 0.00 0.00 0.				
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	Name mtak-apaspok met eindeebruikes Handlicking aangeboukes Leetet installatie do No go Vizagenuur Highligh/Reports Nagenuur Highligh/Reports Nagenuur Helpdesk gozetten Optielen FAG light Gebruikesvallatie Geb	Owner Richard de Groot Herman Mulder Yung JJ-Lao Yung JJ-Lao John Edwards	Final Planned 128-Feb-2013 15-Feb-2013 13-Feb-2013 15-Feb-2013 15-Feb-2013 15-Feb-2013 15-Feb-2013 19-Feb-2013 19-Feb-2013 19-Feb-2013 19-Feb-2013 19-Feb-2013 19-Feb-2013	Hours Variance 327.15 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0				
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	Name mtak-gegrek met eindgebulkers handleiding aangepaat Gebete installade do TNo go Vrapeouw Hynlight Reports Ned Singe Authoritation Soliteller FACs lieft Sekulikersvaluatie Checkspoint Reports Team Pian Team Pian Heart Singe Pian	Owner Richard de Groot Herman Mulder Yung Jj.Lao Yung Jj.Lao John Edwards Peter Cole	Final Planned 28-Feb-2013 21-Feb-2013 23-Feb-2013 22-Feb-2013 22-Feb-2013 15-Feb-2013 15-Feb-2013 25-Feb-2013 19-Feb-2013 19-Feb-2013 23-Feb-2013 23-Feb-2013 19-Feb-2013 24-Feb-2013 25-	Hours Variance 327.15 0.00 44.00 0.00 0.00 0.00 0.00 0.00 0.				
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	Name Intake gesprek met eindgebruikers Handleiding aangebaat Geteste installate Highlight Report Vitageout Vitageout Heiddesk opzeken Gestellen FAGS lijst Gestellen FAGS Hight Beports Heid Stage Plan Heid H	Owner Richard de Groot Herman Mulder Yung JJ-Lao John Edwards Peter Cole	Final Planned 128-Feb-2013 21-Feb-2013 15-Feb-2013 15-Feb-2013 15-Feb-2013 15-Feb-2013 15-Feb-2013 15-Feb-2013 25-Feb-2013 25-Feb-2013 23	Hours Variance 327.15 0.00 44.00 0.00 0.00 0.00 0.00 0.00 0.				

See <u>Automated reports</u> 127 for more information

3.1.3.3.4 Setting tolerances

Tolerances are used to monitor project status. At the start of the project, the project manager and project board agree on the tolerance for the project. Tolerances are the allowed deviation in time, quality, costs and hours from the planned values. When a project exceeds the agreed tolerances, according to project management methodology it needs to be reported to the project board. In Principal Toolbox, this can be made visible with the RAG indicators on any programme dashboard.

Note: tolerances need to be set for each project list and programme separately. They are not inherited from higher levels.

Tolerances can be set by a programme manger for the programme / project list as a whole and for projects separately. To set tolerances, click **'Edit Tolerances'** on the programme dashboard.

Projectmanagement > IT Department > IT Change projects										- 1	
Dashboard	Properties -	Gantt & Dependencies	Documents & Knowledge	Models	Archive						
Project I	list: IT Chai	nge projects			Edit Properties	Edit Members	Edit Tolerances	Edit Widgets		8	۹

Programme and Project Tolera	nces							Close
Enter the tolerances Enter the tolerances for the projects in the tolerances can be set differently by setting	is programme g alternative v	/ project list. The de alues in the list belo	efault toleran w.	ces can be s	et in the first row. F	or spec	cific projects, t	he
Tolerances can be set absolutely or r Stage Planning Shows whether or not the active stag Product Planning Counts the number of products overce Costs Summarizes the costs (committed, a Hours Summarizes the hours (committed, a	relatively (perc le is running b due (in respect ctual and rema ctual and rema	entage based) for the ehind, or on schedul to the total number aining) and compare	he following le with respe of products es this in res es this in res	dimensions: ect to the plan in the project pect to the bu pect to the bu	ined end date. plan). dget for all produci idget for all produc	ts in the ts in the	e project plan. e project plan.	
Default project tolerances						Edit	* Planning T	olerances 💌
		Stage Planning Tole	rance		Product Planning T	oleranc	e	
Name 🔶		Orange (%) Orange (Abs)	Red (%)	Red (Abs)	Orange (%) Orange (Abs)	e Re	ed (%) Red	(Abs) Active Stage Only
IT Change projects		0	0	0 0	0	2	0	4
Project specific tolerances (exceptions	to the default	tolerances)				Edit	* Planning T	olerances
		Stage Planning Tole	rance		Product Planning T	oleranc	e	
Name 🔶	Project Specific Tolerances	Orange (%) Orange (Abs)	Red (%)	Red (Abs)	Orange (%) Orange (Abs)	e Re	ed (%) Red	(Abs) Active Stage Only
Apollo Project		0	0	0 0	0	0	0	0
Juno Project		0	0	0 0	0	0	0	0
Omega Project		0	0	0 0	0	0	0	0
Venus Project		0	0	0 0	50	0	100	0
Zeus Project		0	0	0 0	0	0	0	0

Tolerances can be set for the entire programme or project specific

In the 'Programme and project tolerances' window, you can set tolerances for the following four categories.

- Stage : Shows whether or not the active stage is running behind or on schedule with respect to the planning end date.
 Planning : Counts the number of products that are overdue (final planned date before today and product is not finished).
- Hours : Compares the spent hours (committed + actual + variance) with the budget.
- Costs : Compares the spent costs (committed + actual + variance) with the budget.

The 'default project tolerances' are used for all projects in the programme. If project specific tolerances are filled for a project, these will overrule the default tolerances.

- Activate the Project specific tolerances per project by selecting the checkbox in the column **Project Specific Tolerances**.

- For the tolerance settings to be active for the current stage select the checkbox in the column **Planning active stage only**.

By default you will see an overview of the Stage planning and Product Planning tolerances.

Project specific tolerances (exce	ptions to the default t	olerances)							Save	Cance
		Stage Plann	ing Toleran	се		Product Pla	anning Toler	ance		
Name 📥	Project Specific Tolerances	Orange (%)	Orange (Abs)	Red (%)	Red (Abs)	Orange (%)	Orange (Abs)	Red (%)	Red (Abs)	Active Stage Onl
Apollo Project	×	0	15		0 3	0 () (0	0	
Juno Project		0	0		0	0 0	0	0	0	
Omega Project		0	0		0	0 0	0	0	0	
Venus Project		0	0		0	0 50	0	100	0	
Zeus Project		0	0		0	0 0	0	0	0	

Setting planning tolerances

Select the view **Cost & Hours Tolerances** from the drop down list to set the Cost and Hours tolerances.

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Project specific tolerances (exceptions to the default tolerances) Save Cancel										
		Costs Toler	ance				Hours Tolerance			
Name 🔶	Project Specific Tolerances	Orange (%)	Orange (Abs)	Red (%)	Red (Abs)	Active Stage Only	Orange (%) Orange (Abs)	Red (%)	Red (Abs)	Active Stage Only
Apollo Project	\checkmark	0		0	0	0	0	0	0	0
Juno Project	v	0		0 1	00	0	0	0	0	0
Omega Project		0		0	0	0	0	0	0	0
Venus Project		0		0	0	0	0	0	0	0
Zeus Project		0		0	0	0	0	0	0	ol

Setting Cost & Hours tolerances

For each of these, you can set both absolute numbers and percentages of the total. The colours of the RAG indicators are set according to worst case scenario tolerances for cost and hours. Example:

Tolerances set:	
Costs orange (%):	10%
Costs red (%)	20%
Costs orange (abs)	5,000
Costs red (abs)	10,000
Project costs:	
Budget	100,000.00
Committed	25,000.00
Actual	65,000.00
Remaining	23,000.00

So the expected costs for the project are (25,000 + 65,000 + 23,000) = 113,000. The budget is 100,000, so the expected deviation is 13,000.

According to the percentages set, this would result in an amber (orange) indicator. However, since the absolute number for a red indicator is 10,000, it will show red on the programme dashboard.

3.1.3.4 Document management and approval

You can store documents at various locations within the Principal Toolbox. The Principal Toolbox will keep the document in the database, so it will be available to all users with access to the document in the Principal Toolbox. It is possible to overwrite older versions with newer ones. The Principal Toolbox will keep the old versions in storage. These will remain available for the manager of the particular level in the tool.

On top of that, it is possible to put an approval cycle on deliverables and/or documents with the add-on 'Advanced Customisation & Workflow'.

To make document management much easier, the tab 'Documents' has been added on the project level. This tab makes it easier to search for specific documents within a project. The tab gives you several options to search for documents.

0	project			
R	esource Management 👻	Documents -	Portfolio Report	Reports
		Most recent de	ocuments	Member
		Search all pro		
	Product Indiana	Project related	1	
	Project initiation	Documents or	roing	

Most recent documents Search all project documents	:	List of the 100 most recently changed documents for this project Search for documents in this project.
Project related documentation	:	Documents that are not linked to a specific product.
Documents on Plan	:	Documents per product

3.1.3.4.1 Adding documents and templates to products

Documents in any file type can be added to a 'Product page':

Product Description Templates Deliverables	:	Product specification; goal, composition and quality demands. Template(s) as the basis for the (management) products. Products/documents to be delivered.
1. Go to the 'Product page	·'.	Add Add Note

2. Click Add in order to add a document or to add an intranet link. Fill in the following information:

Description :	Description of the document.
Revision/Doc nr. :	Document version.
Filename :	Select a document with the 'Browse' button or, alternatively
Internet address :	Fill in a hyperlink.
Internal document link:	Provide a document ID from a document at another location in the Principal Toolbox application. The ID can be found in the <u>document</u> <u>history</u> .

This allows for a centrally placed document to be linked to from projects. Update by updating only the original centrally placed document.

3. Click **OK** to add a document to the Principal Toolbox.

You are able to open documents saved in the Principal Toolbox, however you are not allowed to edit them. In order to edit a document it is necessary to download the document. After editing you have to add it as a new version.

Note: Hyperlinks have the following syntax:

- internet addresses look like "http://intranet.organisation.com/documents/example.doc"
- links to document locations look like: "file://p:\documents\example.doc"

When using links to document locations, make sure all users have the same drive mapping.

3.1.3.4.2 Updating a document

- 1. Locate the document you want to update.
- 2. To update the document with a new version, select it and click **Update**. Fill in the following information:

Templates	Add	Download Template	Keyword List	Open Tem	plate	Remove	Show History	Update
Name		Description	Revision	Published	Publis	sher	Merge	
Project_Reportv2.xls		Progress Report	v1.4	09-Apr-2010	Erik A	albersberg	\checkmark	
Highlight_Report.rtf		Highlight Report	v 1.4	20-Aug-2010	Erik A	albersberg	\checkmark	

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Description	:	Standard description of the last version
Revision/Doc number	:	New version number.
Filename	:	Select the new version of the document with the 'Browse' button,
Internet address	:	OR fill in a hyperlink.
Internal document link	:	Provide a document ID from a document at another location in the Principal Toolbox application. The ID can be found in the document history.
		This allows for a centrally placed document to be linked to from projects. Update by updating only the original centrally placed document.

- 3. Select the document concerned and click **Show History** in order to show a list of all the former versions of the document. Remove other versions by using the '**Remove**' button.
- 3.1.3.4.3 Document approval (add-on)

Important documents like the Project Initiation Document (PID) and end project report need to be approved by a member of the project board. Other documents/deliverables in the project may need to be approved by a specific person as well. To support this approval procedure, the 'Approval' add-on is available.

- 1. Go to the 'product page' of a product.
- 2. Click Add or Add note at Deliverables to insert a specific deliverable.

Deliverables			Add	Add Note	Remove	Request Approval	Show History	Update
Name	Description	Revision	Published	d Publis	ner	Approval Status	Review Requ	ester
PID.rtf	PID	1	15-Feb-2	013 Erik Aa	lbersberg			

- 3. To request approval on this document, place the tick mark in front of the document and click the ' **Request Approval**' button. A new window will open.
- 4. First you will have to define the approver(s) for the document. The next step is to set the due date and insert any remarks to inform the approver(s). If you do not want to send an e-mail to the approver, remove the tick mark at '**Notify Approvers**'.

Request								
Approve marked documents This operation will request approval for all the marked documents. This is your selection: - PID.rtf								
Approval settings								
Approvers			Available users					
John Edwards		Remove ->	Arjan van der Laan Erik Aalbersberg Jeroen van Barneveld Peter Cole Richard Hammond Samuel Davies Yung Ji-Lao					
Due date: Remarks:	15-Feb-2013							
Notify Approvers:	v							
OK Cancel								

Requesting approval

5. Click **OK** to sent the document in for approval. On the product page the status changes to 'Waiting for approval'.

Deliverables			Add Ad	d Note Remove	Request Approval	Show History	Update
Name	Description	Revision	Published	Publisher	Approval Status	Review Requ	ester
PID.rtf	PID	1	15-Feb-2013	Erik Aalbersberg			

Approving a document

The reviewer needs to review the document and approve or disapprove it. The documents which need to be approved can be found at the reviewers 'Home' page.

1. Go to your 'Home' page. Here you will see all documents waiting for approval.

Approval Entries (rejected)								
Document	Location	Status	Approver	Requester	Due Date 🌲	Remarks by Owner		
Project_Initiation_Document	nt Project Initiation Document	Rejected	Erik Aalbersberg	Erik Aalbersberg	06-Apr-2010			

- 2. Click the Product name to open the specific 'Product page'. To review the document click the document name.
- 3. After the review you need to '**Approve**' or '**Reject**' the document by clicking the appropriate button Approve Reject. A new window will appear where you can insert remarks.
- 4. Click '**OK**' to finish the approval procedure. And the status of the document will change to Approved or Rejected.
- 3.1.3.4.4 Adding minutes of meetings

Fast consultation of the minutes of meetings can be very useful for the project team members and makes the dissemination of minutes and diary dates unnecessary.

In the logs section on your project dashboard you find a link for 'Minutes of meetings'. Here you can keep all of the meeting reports and appropriate documents.

- 1. Go to the 'Project dashboard'
- 2. Select 'Minutes of meetings' under the logs.

Logs		
	New	Total
I Issue log		10
R Risk log		4
Q Quality review log		1
C Change log		2
A Daily / Action log		13
Lessons learned log		1
Minutes of meetings		
		-

Logs

- 3. Using 'Add' you can add the minutes of the meeting, with 'Add note' you can add a note and with remove you can remove it again.
- 4. Using the '**History**' and '**Update**' buttons you can look at the history of a document and with update you can replace an existing document (see <u>Updating a document</u> [59⁻).

Minutes of meetings at Apollo project Close							
Documents (files, links, text)	Add	Add Note	Remove	Show History Update			
Name	Description	Revision	Published	Publisher			
Minutes_of_Meeting.docx	Minutes of Meeting	1.2	15-Feb-2013	3 Erik Aalbersberg			

Minutes of meetings

3.1.3.5 Issues, risks, quality reviews and lessons learned

Within the Principal Toolbox all (possible) log items (issues, risks, quality reviews, changes, lessons learned) can be logged through the different logs available on the project dashboard.

On all logs custom fields can be defined with the add-on <u>'Custom fields'</u> 15. Only the basic functionality is explained in the manual. The logs available within the Principal Toolbox, are

- Issue log 63
- <u>Risk log</u> 65
- Quality review log 65
- Change log 67
- Daily / Action log 68
- Lessons learned log 69

Note: An issue, risk etc. can initially be created on project level, but after examination can be reassigned to a specific product or work package. To assign an issue, risk, etc. to a product (or to change the product which is affected) open the issue and select the appropriate product in the pull-down menu at 'Product'.

Note: The owner of a log item are able to change all information of that log item. The project manager and project support can change all information of all log items at any time.

ssue 7: Bug for	und in versio	on 7							Save	Cance
Description:	Bug four	id in version 7		Owner:		John Ed	wards	T		
Type:	Off-spec	-	(Creator:		Gerard I	lesen			
Status:			C	Create Date:		04-Jul-2	005			
Priority:			F	Product / Plan item:		Pilot Pre	paration (Wo	rk Package)		-
Due Date: Decision:	01-Apr-2 Assigned	010 1 v	F	Remarks:		 Project Initiatio Project Project Initial B Project Project	start-up n Stage Auth Brief Mandate nitiation usiness Case Authorisation Initiation Doc	orisation ument		
Actions										
Nr Name		Description	Owner	Related To	Due	Date	Rema	ks by Owner		
 10 Commu custom solving 	unicate with er about bug status		0 Yung Ji-Lao	7: Bug found in version 7						
- 9 Please error	try to reproduce		0 Jeroen van Barneveld	7: Bug found in version 7						
Discussions										
Creator (Date)	Message									
Documents (files, li	nks, text)									
Name		Description					Devision	Published	Publisher	

Adding an issue

History log

For <u>every</u> log-item there is a history tab available. This shows history information for tracking who has done what.

Properties History					
Issue 7: Bug for	und in version 7	7		Back 🛔	
Person	Date	Object	Action	Change	
			Owner=John Edwards		

History tab for an issue

Discussion messages on log items

On a log item it is possible to add discussion messages. On these messages the author and date is registered.

Discussions		New
Creator (Date)	Message	

Here you are able to start a new discussion

3.1.3.5.1 Issue log

Issues can be created in two ways; by clicking '**Issue log**' on the 'Project dashboard' or by making a new issue from a product on the product page. In the second case the issue will automatically be related to the specific product.

- 1. Go to the summary page of a product.
- 2. Now click the tab 'Logs'.
- 3. Click 'New' in the blue 'Issue listing' bar. Then fill in the following information:

Issues	Edit	New	Remove	~	!	i,	×	Сору	Move	* Open Issues	•	View Options -

Description	:	Give a description of the issue.
Туре	:	Choose the type; RFC, Off-spec, Question, Concern or Issue.
Status	:	Give the status of the issue.
Priority	:	Decide the priority of the issue.
Due date	:	When does the issue need to be resolved?
Decision	:	The decision concerning the issue.
Owner	:	Owner/responsible person for the issue.
Product	:	To which product or work package is the issue related, leave blank when it is project related.
Remarks	:	Any remarks concerning the issue.

4. By clicking 'Add' or 'Add note' you can add important documents/notes on to the issue.

Properties History										
Issue 8: Slow In	ternet connection				Edit Back 🛛 🛤					
Description:	Slow Internet connection	Owner:		Samuel Davie	25					
Туре:	Issue	Creator		Gerard Mesen						
Status:	-	Create I	Date:	26-Aug-2005						
Priority:	t	Product	/ Plan item:	Pilot Preparation (Work Package)						
Due Date:	23-Apr-2010	Remark	s:	Contact IT to	Contact IT to find out why					
Decision:	Open									
Actions			Edit New	Remove 🗸	! * Open Actions					
Nr Name	Description	Owner	Related To	Due Date	Remarks by Owner					
- 11 Technic find out	al person should reason for slow c	0 Jeroen van Barneveld	8: Slow Internet connection	-						
Discussions					New					
Creator (Date)	Message									
Documents (files, lin	iks, text)				Add Add Note					
Name	Description			Revision	Published Publisher					

Adding a new issue

- 5. You can always alter the issue later by clicking on the issue in the 'Issue log'.
- 6. The project manager and project support roles can also copy and move issues. To copy an issue to

another programme or project, you can use the **'Copy'** and **'Move'** buttons: **Copy Move**. With copy, you create a duplicate issue within your own project. With the move button, you can select another project or programme to move the risk to.

7. In order to close an issue you can set the 'Status' to 'Closed' but you can also select the log item(s) by clicking the row to select and then clicking the ' \checkmark ' button.

Issue	es			Edit	New	Remove			51	11 8	Conv	Move	* Onen Is	21102		View O	ntions
		Nr Description	P	A Type	New	Decision	•	Owner	643	щo	Product / Pla	an item	Due Dat	te	Remarks	view o	puono
Ŧ	-	8 Slow Internet connection	0	1 Issue		Open		Samuel D	avies		Pilot Prepara Package)	ation (W	ork 23-Apr-	2010	Contact IT	to find o	ut why
	7	7 Bug found in version 7	0	2 Off-spec		Assigned		John Edw	ards		Pilot Prepara Package)	ation (W	ork 01-Apr-3	2010	Try to repro find the bug	duce th	e error l
1	7	6 Delay in system development		2 Concern		Deferred		Jeroen va	n Barneve				17-Jun-	2010	Maybe we : planning	should a	djust th
!	-	5 Request for change of the page layout	1	2 RFC		Approved		Yung Ji-Li	ао		Pilot Prepar Package)	ation (W	ork 30-Apr-2	2010	Look for ne	w desigi	n
!	7	4 Different page layout	0	1 RFC		No Action		Samuel D	avies		Updated use documentati	er ion	01-Apr-3	2010			
t	-	3 Request for more background material	0	1 RFC		Resolved		Richard H	ammond		Requiremen	its report	28-May-	-2010	Acquired al	I the ma	terial
!!	-	2 Request for roll-out on Macintosh machines	0	0 RFC		Investigatio	n	Samuel D	avies				19-Apr-2	2010			
Docu	ume	ents (files, links, text)										Add	Add Note	Remove	Show Hi	story	Updat
1	Nam	ne	De	scription									Revision	Published	Publish	ner	

Issue log

Note: All project team members are allowed to create new issues. The project manager and

project support can edit all issues. The owner and creator of an issue can edit all information of that particular issue.

3.1.3.5.2 Risk log

The risk log is a central place where risks are identified, described and where certain decisions and actions are taken.

A risk can be made in two ways; by clicking '**Risk log**' on the 'Project dashboard' or by making a new risk at a product on the 'Product page'. In the second case the risk is automatically related to the specific product.

- 1. Go to the 'Product page' of a product.
- 2. Now click the tab 'Logs'.
- 3. Click here behind 'Risk listing' on '**New**'. Then fill in the following information:

Risks	Edit	New	Remove	~	!	fi.		XI	Сору	Move	* Open Risks	 +	View Options -
Description	:	C	Give a de	escr	iptio	n of	the	risk.					
Type .	:	F	ill in the	typ	e of	risk.							
Status	:	F	Fill in the	risk	sta	tus.							
Priority	:	Ľ	Decide th	ne ri	sk p	riorit	v.						
Due date	:	F	inal dat	e wł	nere	afte	r ris	k me	easure	es nee	ed to be taken.		
Decision	:	Т	he deci	sion	of t	he ri	sk o	ccui	rring.				
Chance	:	0	Chance of	of th	e ris	k oc	curr	ing.	0				
Severity	:	l.	mpact c	ause	e up	on ri	sk o	ccu	rrence).			
Owner	:	C	Dwner/re	spo	nsib	le p	erso	n fo	r the r	isk.			
Creator	:	A	Author of	f the	risk	. '							
Product	:	Т	o which	pro	duct	t is tl	he ri	sk re	elated	, leav	e blank when it	t is pro	ject related.
Remarks	:	A	Any rema	arks	con	cern	ning	the i	ssue.	•		•	

- 4. Save your new entry by clicking the 'Save' button.
- 5. Furthermore you can also add an action to the risk by clicking 'New' behind 'Risk listing.
- 6. By clicking 'Add' or 'Add note' you can add important documents/notes to the risk.
- 7. You can change the risk any time at a later date by clicking it's description in the 'Risk log'.
- 8. Close a risk by setting the status to 'Closed'
- 9. The project manager and project support roles can also copy and move risks. To copy a risk to

another programme or project, you can use the **'Copy'** and **'Move'** buttons: **Copy Move**. With copy, you create a duplicate risk within your own project. With the move button, you can select another project or programme to move the risk to.

Note: Only the project manager and project support can create new risks. However, the owner and reviewer of a product can also create risks related to that product. The project manager and project support can edit all risks. The owner and creator of a risk can edit all information of that particular risk.

3.1.3.5.3 Quality review log

A quality review (quality control) is a standard method to test a product for its measurable quality criteria. This technique is especially suitable for documents (e.g. developments, procedures and reports).

The criteria for the quality of a product are taken up in a product description. It describes the goal of the product, the composition of the product, which sources are to be used, the form in which the

product should be delivered and which quality criteria the product must meet.

We will describe the quality review procedure underneath:

- Go to the 'Product page' of a product. The 'checked' date on this page gives the date on which the quality review should be finished. To document this further, quality reviews can be created in the quality review log.
- 2. Click the 'Logs' tab.
- 3. Click 'New' in the blue "Quality review listing" bar.

Quality reviews	Edit	New	Remove	1	!	i,	XB	Сору	Move	* Open Quality Reviews	1-	View Options -

4. Fill in the following information:

Description	:	Short description of the quality review.
Status	:	Open/Closed. Has the review been carried out?
Priority	:	Priority of the quality review.
Due date	:	When is the review due by.
Method	:	Describe the method (see the Product Description).
Reviewer	:	Who will carry out the review.
Results	:	Give the review results. (, OK and action items)
Owner	:	Owner of the quality review.
Creator	:	Creator of the quality review.
Created	:	Date when the quality review was made.
Product	:	To which product is the review related, leave blank when it is project related.
Remarks	:	Remarks with regard to the guality review.

- 5. Click the 'Save' button to save your new entry.
- 6. It is possible to add actions and documents to the quality review. To add an action you need to do the following; click '**New**' behind 'Action listing' and fill in the following information:

Name	:	Name (identifier) of the action
Description		Description of the action
Status	:	Status (open / closed)
Priority		Priority
Due date		When should the action be finished
Owner		Owner / person responsible for the action
Creator	:	Who has created the action
Related to	:	Here a link to the quality review will be shown.
Remarks	:	Any remarks, status description.

- 7. Click the 'Save' button to save your new entry.
- 8. By clicking 'Add' or 'Add note' behind documents you can add documents or notes with additional information to the quality review.

Properties H	listory										
Quality re	view	1: Quality	review				(Edit	ack		ð
Description	:	Qu	ality review		Owner:	Peter Cole					
Status:		-			Creator:						
Priority:					Create Date:	20-Feb-20	05				
Due Date:		04-	May-2010		Product / Plan item:	Database	configured				
Method:					Remarks:						
Reviewer:		Sa	muel Davies								
Results:		Act	ion Item(s)								
Actions						N	ew * Op	en Actior	IS		•
Nr	Name		Description	🕒 Owner	Related T	o Du	e Date	Ren	narks	by Ow	ner
Discussions	5									1	Vew
Creator (Date))	Message									
Documents	(files, li	nks, text)						A	dd	Add N	lote
Name			Description			Revision I	Published	Publish	er		

Adding a quality review

9. To copy or move a Quality review to another programme or project, you can use the 'Copy' or 'Move' button: Copy Move

'Move' button: Copy Move

3.1.3.5.4 Change log

The Principal Toolbox has a separate 'Change log', which offers a central repository for documentation of changes within your project.

The project manager needs to judge all issues by their priority and their impact. In case that an issue (off-spec, RFC) falls within the tolerance of a stage then he/she can choose to accept the issue and log the change in the 'Change log'.

If an issue leads to the result that the project/stage is threatened to fall outside the tolerances set the project manager needs to discuss the issue with the project board. They decide whether actions on the issue are carried out or not. If the project board decides to accept the issue then the project manager needs to define a change.

- 1. Go to the 'Project dashboard'.
- 2. Go to the 'Change log'.
- 3. Click 'New' in the blue 'Change listing' bar.

Changes	Edit	New	Remove	~	!	ſ,		XI	Сору	Move	* Open Changes	•	View Options -
---------	------	-----	--------	---	---	----	--	----	------	------	----------------	---	----------------

4. Fill in the following information:

Description	:	Description of the change.
Туре	:	Choose between Specification, Hours, Costs and Planning
Status	:	Open / closed
Priority	:	Low, normal, high, critical
Due date	:	Optional, final date the change needs to be dealt with.
Owner	:	Responsible owner of the change
Creator	:	Creator of the change.
Created	:	Date of creation
Product	:	Optional: product the change is related to.
Remarks	:	Any remarks / status description.

5. Save the new entry by clicking the 'Save' button.

6. If necessary, it is possible to add a related action to the change. Click 'New' in the blue 'Action

listing' header on the details page of the change. For more info about actions see $\frac{\text{Daily}/\text{action log}}{68}$.

- 7. By clicking 'Add' or 'Add note' in the 'Documents' header you can add any related documents or notes.
- 8. To copy or move a change to another programme or project, you can use the 'Copy' or 'Move' button: Copy Move
- 9. To close the change, set the status of the change to 'closed'. Alternatively, from the change log, you can select the change and set the status to closed with the ✓ button.

hange	e log at Apollo	proje	ct											Close		
hanges	i	Edit	New	Remove	×	!	ĥ			Сору	Move	* Open Cł	nanges	▼ Vie	w Options	
Nr Description			n	🖻 🖪 Туре			Owner P			Product / Plan item Due Date			ite	Remarks		
- 2 Replacement Server		rver	0	0 0 Specification			John Edwards Database cor			configured	d 09-May	-2010				
	1 Change in plan specification	or	0	0 Planning		Yu	ng Ji-Li	ao		Requirem	ients repor	t 04-May	-2010			
ocume	nts (files, links, text)												Add	Add Note	
Name	e		De	scription								Revision	Published	Publisher		

Change log

3.1.3.5.5 Daily/action log

Actions can be created from product pages, related to issues, risks, changes, quality reviews and from the action log.

To define an action do the following:

- 1. There are several places from where you can create actions, if you have the correct user rights:
 - a. From the project dashboard, open the 'Daily/action log'.
 - b. Alternatively, go the 'Logs' tab of a product.
 - c. Find the blue 'Action listing' header when on the detail page of an issue, risk, or other log item.
- 2. Now click **Action log** and fill in the following information:

Name	:	Name of the action.
Description		Description of the action.
Status	:	Status (Open/Closed).
Priority		Priority.
Due date	:	When does the action need to be completed
Owner		Owner/responsible for the product.
Creator		Creator of the action.
Related to	:	Relation to a product, issue, risk, etc.
Remarks	:	Any remarks
		•

		-		Odve	Cance
Name:	Communicate with customer about bug solving	Owner:	Yung Ji-Lao 👻		
Description:		Creator:	Gerard Mesen		
Status:		Created:	04-Jul-2005		
Priority:		Product / Plan item:	No name		•
Due Date:		Related To:	7: Bug found in version 7		-
		Remarks by Owner:			~
					Ŧ
Discussions					
Creator (Date)	Message				
Documents (files	links, text)				

Adding an action

3. Click the 'Save' button to save your new action.

Note: Only the project manager and project support can create new actions. However, the owner and reviewer of a product can also create actions related to that product. The project manager and project support can edit all actions. The owner and creator of an action can edit all information of that particular action

3.1.3.5.6 Lessons learned

To archive positive or negative experiences that may be useful in future projects the lessons learned log is available. Based on the lessons learned log you can create an automated 'lessons learned report' at the end of the project. The lessons learned can be from all areas of interest; the project management method, tools used, good/bad experience with suppliers, etc.

The report can published to allow the organisation to improve the best practices from among other things its project management. Add valuable lessons learned to the project model(s) to have them easily available for project managers and team members.

- 1. Go to the 'Project dashboard'
- 2. Now click the 'Lessons learned log'.

		I
New	Total	I
	10	I
	4	I
	1	I
	2	I
	13	I
	1	I
		I
	New	New Total 10 4 1 2 13 1 1

Lessons learned log

- 3. Create a new lessons learned entry by clicking 'New'.
- 4. Fill in the following information:

Name	: Name of the lesson learned
Creator	: The creator is filled in by the tool.
Created	: Creation date of the lesson learned. Filled automatically.
Remarks	: Explanation of the lesson learned.

5. If more information needs to be added to the lesson learned, a document or note can be attached.

Click 'Add' or 'Add note' in the blue 'Documents' header to add a document or note.

- 6. After completion of these actions, click the 'Save' button to save the new entry.
- 7. To copy or move a lessons learned to another programme or project, you can use the **'Copy'** or **'Move'** button: Copy Move.

Properties	History					
Lesson	learne	d 1: New Checklist				Edit Back 🛛 🛔
Name:		New Checklist	Remarks:		Use Ch	ecklist version 1.3
Descripti	ion:					
Creator:		Erik Aalbersberg				
Created:		06-Apr-2010				
Documen	nts (files,	links, texts)				Add Add Note
Name	•	Description		Revision	Published	Publisher

Lesson learned

Note: Only the project manager and project support can create new actions. However, the owner and reviewer of a product can also create actions related to that product. The project manager and project support can edit all actions. The owner and creator of an action can edit all information of that particular action.

3.1.4 Finishing a project

Once the products of the project have been realised the project needs to be finished in a controlled way. A number of management products such as the lessons learned report, end project report, and a follow-on action recommendation can be used to report about open actions and recommendations. The project board will then confirm the project closure.

The lessons learned report can be based on the lessons learned log that has been kept during the project. It is quite easy to generate an <u>automated report</u> [127] of this log.

The other logs can be consulted to make the end project report and the recommendations for follow up actions. In the recommendations for follow on actions all the points of attention are shown that are no longer carried out in the project but can be dealt in a new project.

In this section we will further review:

- archiving projects; 71

- removing a project or project model. 72

The activities described in this section can only be carried out by the programme manager.

3.1.4.1 Archiving a project (-model)

Note: Archiving a project can be done by the manager of a programme / project list, or the system administrator. Archived projects are no longer visible to users without these roles. If you want the project to remain available, create a separate project list called 'Archived projects', or a similar name.

After the project has been finished and the project organisation has been disbanded the project can be archived.

Dashboard	Properties -	Gantt & Dependencies	Benefits Monitor	Documents & Knowledge	Models	Archive		
Project I	ist: Quality	and Organisatior	n projects					
Project Ar	chive					F	Remove	Restore
Name 🌲		Objective	P	roject Manager(s)				
TreX project	t	Set-up of an er monitoring sys	tem	erard Mesen				
Programm	ne / Project list	Archive						
Project Mo	odel Archive					F	Remove	Restore
Name 🌲		Objective	P	roject Manager(s)				
Prince2 200	19	Project model 1 complex project	for larger and/or ts					
Programm	ne Model Archi	ive						
Archive								

- 1. Go to the 'Programme dashboard'.
- 2. Select the project concerned by clicking on it's row.

Dashboard	Properties -	Gantt & Dep	endencies Ber	nefits Monitor	Documents 8	Knowledge	Models	Archive								
				• •												
Project I	ist: Quality	/ and Orga	inisation pr	ojects			Edit	Properties	Edit Me	embers	Edit Tolera	ances	Edit Widgets			Q
Name: Descriptio Status:	Quality and projects on: Projects for the organisa	Organisation improving I [more]			- 2	Welc	ome on th	e startpage	e of this p	rogramm	e!					
Logs			Projects			New Impo	ort Expo	rt Move	Model	Archive	* Dashb	oard		View	Optio	ns 💌
	N	ew Total	•			Cu	rrent Stage	Progre	SS	General	Planning I	Hours	Costs Pre	ject Man	ager(s	;)
Issue log	9		Apollo project	t		Pre	oject initiatio	n 🗆		•	•	•	Ari	an van de	r Laai	n
R Risk log			Roll-out of soft	ware on deskto	ps	19	-Aug-2010			•	-	-	•			
A Daily / A	ction log	2	Juno Project			Pre	oject initiatio	n 🔲		•	•	•	😑 Jol	n Edwar	ds	
0			Back-up of all	previous docum	ents	25	-May-2010									
			Venus project			Pro	eparation st	age				9	Pe	ter Cole		
Automated	d Reports	Edit	Logistic optimis													
Project	Report		Zeus Project Roll-out Zeus d	on clients		Pr 02	oject start-u -Sep-2010	P 🔲		•	•	•	He He	nk Visser		
Reports			Project Mode	els									Import	Export	Arc	chive
Programmes	s / Project lists		Name 🔺				Objective							Ownoria		-
Projects	77770,000 11313						Objective							Owner(s)	
Products / P	lan Items		Smail Prince2	project model			Project mo	del for smal	and midsi	ze projects						
Issues			Software imple	mentation proje	ct model		Prince2 pr	oject model	for software	e implemer	ntations					
Risks			Standard Princ	e2 project mod	el		Project mo	del for large	r and/or co	mplex proj	ects.					
Changes																
Quality revie	WS															

Selecting the row of the project

- 3. Click Archive to move the selected project(s) to the archive tab.
- 4. In a pop-up window, you are asked to confirm archiving the selected project (-model). After clicking **OK** the project (-model) is move to the archive.
- 5. The archive can be found at the tab **'Archive'** on the programme / project list level. Note that each programme or project list has its own archive.
- 6. Restoring a project or project model can be done from the 'Archive' tab.

3.1.4.2 Removing projects and project models

Removing projects and project models requires two steps; first you need to archive the project (model) and thereafter you can remove the project (model) from the archive. How to archive a project (model), see chapter Archiving a project (-model) [71].

1. After archiving a project (model), go to archived project (model) by clicking the 'Archive' tab.

Dashboard Properties -	Gantt & Dependencies	Benefits Monitor	Documents & Knowledge	Models	Archive
Project list: Quality	and Organisation	projects			
Project Archive					Remove Rest
Name 🔶	Objective	Pr	oject Manager(s)		
TreX project	Set-up of an en monitoring syst	vironmental Ge em	erard Mesen		
Programme / Project list	Archive				
Project Model Archive					Remove
Name 🌧	Objective	Pr	oject Manager(s)		
Prince2 2009	Project model f complex projec	or larger and/or ts			
Programme Model Archiv	/e				

Archive tab

- 2. Select the project (model) concerned by clicking it's row.
- 3. Click 'Remove' behind the project (model) and confirm with 'OK'.

Remove Restore
Remember: Once projects or project models have been removed from Principal Toolbox it is not possible to roll back this decision.

3.1.5 Managing project models

In the Principal Toolbox, all projects that are created are based on a project model. A project model is an extensive template for projects. It contains products, templates added to these products, lessons learned, and automated reports. This way, it is possible to have standardised projects throughout the organisation, and project managers always have the right templates available. Right from the moment a project is created, automated reports (if available in the project model) are available for reporting purposes. Below, an example of the dashboard of a project model is shown.



Part of the dashboard of the PRINCE2 project model. The dashboard of a project model is identical to a project dashboard.

It is possible to have multiple project models within your organisation. For instance, a default PRINCE2 project model for general use and more specialised project models with specialised content. For instance, a project model for sales or one for software implementation. For these purposes, you could build a product breakdown (see the section about product breakdown 32) that matches most situations for these specialised projects.

In the next sections, you will find information about

- Editing project models 74
- <u>Creating project models</u>
- Moving project models 75

How to create automated reports is explained in the <u>Automated reports</u> 127 section.

3.1.5.1 Editing project models

Note: Project models can be edited by the manager of the project model, or by the system administrator.

Project models can be edited in the same way projects are edited in Principal Toolbox. So, it is possible to add templates, documents, automated reports, a product breakdown, issues, risks, lessons learned, etcetera.

Any data you enter into the project model, except for user names (owners of issues, products, etc.) are copied into projects created with that project model.

To prevent your original project model from being polluted, or your templates etc. from being lost, it is recommended to work with a temporary project when you want to create or change a project model. This way, you can enter example data to check views and automated reports, without affecting the original project model. Take the following steps:

1. Navigate to a programme / project list where you can create a temporary project. If there is no such programme or project list, create it or discuss it with the system administrator.

- 2. Create the temporary project, based on the project model that best approaches your desired end result.
- 3. Change the project to match your desired model.
 - a. Optionally, add a product breakdown for projects with similar end results.
 - b. Add the default management products that are used in your organisation. Use the *blue* products for management products.
 - c. Add green project board products to mark decision points, go / no go decisions in your projects.
 - d. Set up stages, work packages and add the appropriate (management) products to the stages and work packages.
 - e. From the project dashboard, add templates to products.
 - f. Add <u>automated reports</u> 127 to your project dashboard.
- 4. When finished editing the project, navigate back to the programme / project list dashboard. Create the project model as described in the <u>next section</u> [75].
- 5. After finishing the project model, archive and then remove the temporary project.

Notes:

- All operational data in your project will be discarded when creating a project model. So
 milestone dates, deliverables, issues, risks, changes, quality reviews, cost and hour data will
 be removed.
- Any data in the project model itself will be copied into the project when you create a project based on that project model, except for any user names in your project.
- After creating a project, there is no link whatsoever between the project model and the project. So if you change any document templates, or automated reports in the project model, this will not affect the project.

3.1.5.2 Creating project models

New project models are always based on existing projects. A system administrator or programme / project list manager can create project models from any project. First select a project by clicking in the row of the project concerned. Use the **'Model'** button available at the programme / project list dashboard, as illustrated below.

Projects	New Import Export M	ove Model	Archive * Dashboard	▼ View Options ▼
\$	Current Stage F	Progress	General Planning Hours	Costs Project Manager(s)
Apollo project Roll-out of software on desktops	Project initiation 19-Aug-2010		• • •	Arjan van der Laan
Juno Project Back-up of all previous documents	Project initiation 25-May-2010		• • •	John Edwards
Venus project Logistic optimisation project	Preparation stage 24-Jun-2010]•••	Peter Cole
Zeus Project Roll-out Zeus on clients	Project start-up 02-Sep-2010		• • •	Henk Visser

Programme Dashboard

In the dialogue, give an appropriate name to the project model. After choosing **OK**, the project model will appear on the dashboard of the programme or project list underneath the 'Project model listing' header at the bottom of the page.

3.1.5.3 Moving project models

When creating a project model, it will be placed within the programme or project list where it was created. It will be available to the level it was created and - if they exist - any project lists or programmes below that level.

Moving a project model is done by first exporting it and then importing it into the right location. If you want to make the project model available to all programmes and project lists, go to the highest level in the Principal Toolbox and then open the tab 'Models'.

1. Export a project model by selecting it on the project list / programme dashboard. Click 'Export'. In

the dialogue, fill in a name for the project model and optionally a description.

Export Pro	oject
Export a Product documents	oject to a file. Choose whether to export / files and security information (members).
Skip Documents / Files: Skip security (users):	
OK Cance	l

Exporting a project model

- 2. Navigate to the programme / project list you want to add the project model to. In the 'Project model listing' header, click the **Import** button. Give the name for the project model and a description.
- 3. Select the manager for the project model from the user list.

n the import file. Provide a name and Project manager for the new imported Project. rt documents / files. Choose also whether to import security information (members). Project was exported using members that are known as users within this application also included on export. oducts are not imported.
Browse

Importing a project model

- 4. Locate the project model file you just saved and import it.
- 5. If you do not want to have the project model on two locations, navigate back to where you created the model. Archive the project model.

3.1.5.4 Enterprise models

Project models can be created in any project list or programme. The model will be available on the level of the containing programme / project list and on all sub-levels. To make a project model available throughout the Principal Toolbox you can publish it at the so-called enterprise level (the highest level) in the Principal Toolbox.

Two options are available to get the project model at the highest level.

First option

1. The 'new project model' option.

- a. Go to the highest level of Principal Toolbox (enterprise level). Open the tab Models.
- b. Click New at project model listing.
- c. In the dialogue, define the name and description for the project model.
- In the lower part of the window, select the programme where the project model is located. Then select the project model you want to promote to enterprise model.
- **d.** Click **OK** and the model is added to the list of enterprise project models. The model is now available within all programmes of Principal Toolbox and can be chosen when creating a new project anywhere.

Second option

2. With the export / import option.

- a. First export the project model you want to publish. The model will now be saved as a file. Save it at an appropriate location.
- b. Then navigate to the highest level of Principal Toolbox (enterprise level). Open the tab **Models.**
- c. Click **Import.** Choose the project model file and fill in the other fields in the dialogue.
- d. Click **OK** and the model is imported into the list of enterprise project models. The model is now available within all programmes of Principal Toolbox and can be chosen when creating a new project anywhere.

Home Portfo	olio Management Organis	ation Resource All	ocation T	ime Entry	Import / Export		erg 🔻 He	elp Supp	ort Setup 👻
Organisation	I								
Dashboard	Documents & Knowledge	Lessons Learned	Models	Archive					
Organis	ation								
Project Mo	odels					New	Import	Export	Archive
Name 🌲		Туре	Owner(s)	Obje	ctive				
PRINCE2 2 standard	009 modèle de projet	Prince2 Project		Mod PRI	èle pour un projet ICE2				
PRINCE2 p	roject model (EN)	Prince2 Project		Mod proje	el for setting up PRINCE2 ects				
PRINCE2 p	rojectmodel (NL)	Prince2 Project		Mod PRI	el voor het opzetten van ICE2 projecten				
PRINCE2 P	rojektmodell (D)	Prince2 Project		Proje	ektmodell (DE)				
Single Shee	et Project Model	Single Sheet Project							
TenneT Rei	nSec Projectmodel			Proje com	ect model voor grote en/of plexe projecten				
Programm	ne Models					New	Import	Export	Archive
Name 🌲		Туре	Owner(s)	Obje	ctive				
MSP Progra	amme model v2			Mod prog	el for settung up an MSP ramme				

Enterprise models

3.1.6 Generic PRINCE2 Planning Model

As of release 6.0 a new project model has been made available. The new project model, called Generic PRINCE2 Planning Model, offers new functionalities for the Gantt. To be able to use the new Generic PRINCE2 Planning Model, you will have to import the new project model first. You can request the new Generic PRINCE2 Planning Model from our Support Office.

Starting up a new project with the Generic PRINCE2 Planning Model:

- 1. Go to the Portfolio dashboard and click on New in the 'Project listing'.
- 2. Enter the details and select the new project model.
- 3. Select a project manager and click on OK to create the project.

Add Project (Portfolio N	Management)
Project (Portfolio Mana	agement) Properties
Name:	
Objective:	
Remarks by Owner:	
Project Manager:	Erik Aalbersberg
Start Project:	Start Project
Project Model:	PTB model 3.1
Programme:	IT Department
OK Cancel	

Create a new project with the new Generic PRINCE2 Planning Model

The project is now available on the programme and/or portfolio dashboard. The project manager is now able to start planning his or her project.

3.1.6.1 Planning a Project

With the Generic PRINCE2 Project Planning it is no longer possible to edit the project plan via the project dashboard or via the 'Plan' tab. The 'Plan' and 'Gantt' tabs have been replaced by one tab called 'Planning'. The tab 'Planning' contains three sub-tabs: 'Gantt', 'Costs' and 'Hours'. On the tab 'Gantt' you can add new planning items (products, work packages or stages) and edit the planning of those items.



Generic PRINCE2 Planning Model

Adding a planning item:

Project Brief

Initiation Stage Plan

1. Go to the tab '**Planning**' to edit the project plan.

2. Click on the tab '**Gantt**' on Edit to edit the project plan.

3. Click on a '+' to add a new planning item. A new row will appear. Give the item a name.

4. The item can be moved by dragging and dropping it. The green or the blue arrow will indicate where the item will be placed.

5. A planning item isn't a product, work package or stage yet. To edit a planning item, select the row by using the ' \checkmark '.

6. Use **Change Type** to change the planning item in to a product, work package or activity.



- +

- +

-

Planning a project:

1. It is possible to planning an item by enlarging and dragging the bar on the Gantt.

2. It is also possible to plan items by using the calendar in the columns 'Start Planned' and 'Final Planned'.

3. Dependencies can be defined by clicking on the item and dragging a line to the next item.

4. Click on Save to save your changes.

It is also possible to define milestones on the product page. The product page can be accessed via the 'Project Dashboard'.



- 1. Remove selected planning items.
- 2. Move selected planning items to the left.
- 3. Move selected planning items to the right.
- 4. Make dependencies between 2 products (use Ctrl+click, Shift+click or the '✓' to select multiple products).
- 5. Remove a dependency.
- 6. Solve problems arising from conflicting dependencies.
- 7. Print the Gantt.
- 8. Determine the scale of the Gantt. It is now possible to zoom in or out.



Set baseline: No Baseline 👻 Set

- 1. It is also possible to set baselines. Go to the 'Gantt' tab and click on Set.
- 2. Select 'Initial baseline' or 'Actual baseline' and click on Set.
- 3. You can now select the baseline that you would like to display above the Gantt.

Percentage Completed:

It is now also possible to enter a 'Percentage Completed' per item on the Gantt. The percentage can be entered by the project manager on the Gantt or by the product owner on the product page. The result will be displayed directly on the Gantt with black bars.

ble to enter a set of the set of

Views

It is now also possible to create a modified view on the Gantt. This way, you can determine which information will be displayed on the Gantt.

Define view:

- 1. Click on Edit to edit the Gantt.
- 2. Click on *elect* Columns.
- 3. Select the columns you would like to display by using the ' \checkmark '.

A new or edited view needs to be saved; otherwise the view will be lost!

- 4. Click on Save as in the same dropdown menu .
- 5. Select 'New' and give the view a name.
- 6. Confirm with Save View.
- 7. Select the new view below default.

Product Breakdown Structure

Next to the Gantt you can define you product breakdown structure. On the tab Product Breakdown Structure you can view the results of the changes.

Define Product Breakdown Structure:

1. Click on the '+' to add a new specialist product . A new row will appear. Give the product a name.

It is possible to move a product by dragging and dropping the product.
 Select the (specialist) product by using the '√' in front of the product.

4. Define the hierarchy of the products by selecting product and using the

buttons 🛨 and 🛨. With

you can lower the level, with you can increase it.

5. Take a look at the result on the tab 'Product Breakdown Structure'.





Product Breakdown Structure with the Generic PRINCE2 Planning Model

3.1.6.2 Plan Costs

On the tab 'Costs' you can capture the (planned) costs of the project plan. Furthermore, it is also possible to display the budget and actuals here. Costs can also be linked to financial categories.

ashboard Prope	rties 👻 Product Breal	kdown Planning	Resource Manage	ement 👻 Docu	uments 👻	Portfolio F	lepor	t Reports Plaza	3							
Project: Ome	ga Project														Save	Cance
Gantt	Costs Re:	sources														
Project Gantt					Chan	70 Tuno -										
					Chang	de Làbe .	-	Stage Work Pa	іскаде	 Specialist 	Product	Manageme	nt Product	Board Pr	oduct # Act	IVITY
× + +	• @2 C3 ™_S0	lve					e	No Baseline		▼ Set	Q ▼ Vie	w: Default		V	/iew Options	*
	Name		Start Planned	Final Planned	Planned C	C Actual Co	:1 3	Dec 2012 . 10. 17. 24.	31. 7	Jan 2013 . 14. 21.	F 28. 4.	eb 2013 11. 18.	Ma 25. 4. 1	r 2013 1. 18. 25	. .	
+	🗄 Omega Project		31-Dec-2012	15-Mar-2013					-		-		-			
- +	- Project start-u	p	31-Dec-2012	31-Jan-2013												
🕅 + 🖌	···· Project Ma	ndate	31-Dec-201	11-Jan-201 📷	150)			_							
- +	···· Project Brid	ef	10-Jan-201 🞬	23-Jan-201 📷	500)			1							
- +	···· Initiation St	tage Plan	21-Jan-201 🞬	29-Jan-201 📷	400)									=	
-	Initiation SI	tage Authorisation	28-Jan-201 🞬	31-Jan-201 📷							-					
- +	- Project initiati	on	07-Feb-2013	15-Feb-2013							-					
- +	···· Project Init	iation Document (PI	D) 08-Feb-201	15-Feb-201												
- +	···· Next stage	plan	11-Feb-201	15-Feb-201								-				
- +	···· Initial Busir	ness Case	07-Feb-201	08-Feb-201												
- +	Project Aut	thorisation	15-Feb-201	15-Feb-201												
- +		ge	22-Jan-2013	11-Mar-2013												
- +	B- Work Pack	kage 1	22-Jan-2013	28-Feb-2013												
- +	Produc	at 1	18-Feb-201	28-Feb-201												
- +	Produc	at 1.1	22-Jan-201 🞬	22-Jan-201 🔛												
- +	Produc	ct 1.2	22-Jan-201 🞬	22-Jan-201 🔛												
•	Work Pack	kage 2	22-Jan-2013	22-Jan-2013						s <mark>.</mark>					-	
Costs																
Q	Add Finance	cial Category										Summai	y Graph: B	udget versi	us Planned	-
Financial Categor	y B	udget I	lanned	Nov 2012		Dec 2012		Jan 2013		Feb 2013	3	Mar 2013		Apr 2013		
				5. 12. 19.	26. 3.	10. 17.	24.	31. 7. 14. 2	1. 28.	4. 11. 1	18. 25.	4. 11. 18	. 25. 1.	8. 15.	22. 2	
- Summary		3,500	1,050					15 75105 300 500	4.992.9		5500	1050				
Capex		1,000	600					10 5070 190 310	7.9/1.4		1000	600				
Opex		2,500	450					5 2535 110190	7.421.4		2500	450				

Plan costs with the Generic PRINCE2 Planning Model

Note: by default, the project budget is captured on the portfolio and will only be displayed on the project. This depends on the financial configuration on the portfolio.

Capture planned costs:

1. Go to the tab 'Costs' and click on **Edit**.

2. Double click on the Gantt in the column 'Planned Costs'. The planned costs can be captured per product on the Gantt.

3. Click on Add financial category.

4. Select the required financial categories and click on **Add**.

5. Click on the empty field behind the financial category (in the column 'Planned') and enter the planned costs. This will immediately create an entry. When the planning changes the entries will also be modified.

				Planned Cos
Ome	ga Project			
÷	Project start-up			
1				
	Project Mandate			
	 Project Brief 			
	Initiation Stage P	lan		
	Initiation Stage A	uthorisatio	n	
	Project initiation			
	Project Initiation I	Document	(PID)	
	Next stage plan			
	Initial Business C	ase		
-				
Proje	ct Initiation Document (PID)			:
Start	Planned: 08-Feb-2013	Duration In Da	ays (days):	6
		Duration in Da	ays (nours).	48
Final	Planned: 15-Feb-2013			
Final	Planned: 15-Feb-2013 s section		0	
Final Cost Add	Planned: 15-Feb-2013 s section Financial Category tial Category	Planned	Costs	are spread over period
Final Costs Add Finan Cape	Planned: 15-Feb-2013 s section Financial Category cial Category	Planned 5.000	Costs Actual	are spread over period
Final Costs Add Finan Capeo Opex	Planned: 15-F6D-2013 s section Financial Category c	Planned 5,000 7500	Costs Actual	are spread over period

The budget, planned costs and actuals will be displayed on a summary graph on the bottom of the 'Costs' tab.

Financial Category	Budget	Planned	n	ov 20	12			dec 2	2012			ja	n 201	3		fe	b 20	13			mrt 2	013	
			 5.	12.	19.	26.	3.	10.	17.	24.	31.	7.	14.	21.	28.	4.	11.	18.	25.	4.	11.	18.	25.
⊢. Summary	3.500	1.050																	350	00			
											5 75	105	3005	0014.	992,9						105	0	
	4 8 8 8											103		-1111	574 4				400	0	60		
Capex	1.000	600								1	0 50	70	19 <u>0</u> 3	1944	1.4				100		00	,	
Oney	2 500	450									-		-1111			_	_	_	250	00	_	_	
Upex Opex	2.000	450									5 25	85 ·	1101	9267,	421,4					<u> </u>	45)	
			_	_	_	_	_	_	_		_												

Summary graph with costs

3.1.6.3 Plan Hours

On the tab 'Resources' it is possible to capture planned and budgeted hours per resource or skill. The budget for hours is not captured on the portfolio, but can also be captured on the project by the project manager.

ject: Or	mega Project																			
tt	Costs	Resources																		
oject Gai	ntt							Stage	• Wor	k Packa	ige i	Speci	alist Pr	oduct	• Mana	gemer	t Produc	t Board	Product a	Activit
											ê	No Ba	seline		•	Q, 1	View:	Default		×
i Nar	ne		Start Planned	Final Planned	Planned H	Actual Hou	2	Dec 2012	24 24	Jar	n 2013	3	0 A	Feb 201	3		Mar 201	3		
ė	Omega Project		31-Dec-2012	15-Mar-2013			. 9.	10. 17.	24. 5	. 7.	14.	21. 2	0. 4.	11.	10. 2.	J. 4.		0. 23.		
	- Project start-	up	31-Dec-2012	31-Jan-2013								_								
	Project M	andate	31-Dec-2012	11-Jan-2013	500				-											
	Project Br	ief	10-Jan-2013	23-Jan-2013																
	Initiation S	Stage Plan	21-Jan-2013	29-Jan-2013							1							E		
	Initiation S	Stage Authorisation	28-Jan-2013	31-Jan-2013																
	- Project initiat	ion	07-Feb-2013	15-Feb-2013																
	Project In	itiation Document (PID)	08-Feb-2013	15-Feb-2013																
	Next stag	e plan	11-Feb-2013	15-Feb-2013																
	··· Initial Bus	iness Case	07-Feb-2013	08-Feb-2013																
	Project Au	uthorisation	15-Feb-2013	15-Feb-2013																
	- Execution sta	ige	22-Jan-2013	11-Mar-2013								/					N			
	- Work Pac	kage 1	22-Jan-2013	28-Feb-2013								v			1					
	Produ	ict 1	18-Feb-2013	28-Feb-2013																
	Produ	ict 1.1	22-Jan-2013	22-Jan-2013								•								
	Produ	ict 1.2	22-Jan-2013	22-Jan-2013								•								
	- Work Pac	kage 2	22-Jan-2013	22-Jan-2013								2						-		
												-								
ources															-					
								-							Su	mmary	Graph:	Budget ve	sus Plant	nea 💌
		Resource	Budget	Pla	1	Ш	201	2		IV			1		Ш	20	13 		IV	^
Summar	ry			500									500							
												50								
Proje	ect Manager ICT	Erik Aalbersberg		500									500							
	and the state of the b																			
	entrant (Ir)																			
Con	Sultant (01.)																			

Plan hours with the Generic PRINCE2 Planning Model

Hour budget per resource:

- 1. Go to the tab 'Resources' and click on **Edit**.
- 2. Click on Add Resource.

3. Select the required resources and confirm with **Add**.

4. Double click on the empty field behind the resource and enter a start and end date with a budget.

01-Feb-2013 → 4 February 2013 → - 28 29 30 31 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 1 2 3		Star	t				End				Hours per Day
Image: February 2013 → Image: February 2013 → Image: February 2013 → Image: February 2013 → Image: February 2013 → Image: February 2013 → Image: February 2013 → Image: February 2013 → Image: February 2013 → Image: February 2013 → Image: February 2013 → Image: February 2013 → Image: February 2013 → Image: February 2013 → Image: February 2013 → Image: February 2013 → Image: February 2013 → Image: February 2013 → Image: February 2013 → Image: February 2013 → Image: February 2013 → Image: February 2013 → Image: February 2013 → Image: February 2013 → Image: February 2013 → Image: February 2013 → Image: February 2013 → Image: February 2013 → Image: February 2013 → Image: February 2013 → Image: February 2013 → Image: February 2013 → Image: February 2013 → Image: February 2013 → Image: February 2013 → Image: February 2013 → Image: February 2013 → Image: February 2013 → Image: February 2013 → Image: February 2013 → Image: February 2013 → Image: February 2013 → Image: February 2013 → Image: February 2013 → Image: February 2013 → Image: February 201	X		01-1	Feb	-2013	3 🗐					
 28 29 30 31 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 1 2 3 4 5 6 7 8 9 10	8	•			Feb	ruary	/ 201	3 🗸		•	
28 29 30 31 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 1 2 3 4 5 6 7 8 9 10		-									
4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 1 2 3 4 5 6 7 8 9 10				28	29	30	31	1	2	3	
11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 1 2 3 4 5 6 7 8 9 10				4	5	6	7	8	9	10	
18 19 20 21 22 23 24 25 26 27 28 1 2 3 4 5 6 7 8 9 10				11	12	13	14	15	16	17	
25 26 27 28 1 2 3 4 5 6 7 8 9 10				18	19	20	21	22	23	24	
4 5 6 7 8 9 10				25	26	27	28	1	2	3	
4 3 0 7 8 3 10				4	5	6	7	8	9	10	
		-									l

Or:

5. Go to the tab 'Resources' and click on **Edit**.

6. Click on Add Skill.

7. Select the required skills and confirm with **Add**.

8. Double click on the empty field behind the skill and enter a start and end date with a budget.

Add Skill	×
Q	
Consultant (Jr.)	
Consultant (Sr.)	
Project Manager ICT	
Software Developer	
Software Engineer	
	Add Cancel

Plan hours:

1. Go to the tab 'Resources' and click on **Edit**.

2. Double click on the Gantt in the column 'Planned Hours'. The planned hours can also be captured per product.

3. Click on Add Resource or on Add Skill.

4. Select the required resource or skill and click on **Add**.

5. Click on the empty field behind the resource or skill (in the column 'Planned') and enter the planned hours.

This will immediately create an entry. When the planning changes the entries will also be modified.

Fillal Fialilieu.	31-Jan-2013	Duration Duration	In Days (days): In Days (hours):	4 32	
Resources					
Add Resource A	dd Skill		Ho	urs are spread	over perio
Skill	Resource		Planned Hours	Actual Hours	
Project Manager ICT			30		
Software Engineer			120		
Consultant (Sr.)	Arjan van der	Laan	300		
Total			150		

The budget, planned costs and actuals will also be displayed on a summary graph on the bottom of the 'Hours' tab.

3.2 Portfolio management (add-on)

The Portfolio Management module enables the collection of initiatives and a subset of an organisation' s projects and programmes. Additionally, the module provides functionality to monitor progress of the projects and programmes within the portfolio, and to generate various portfolio related reports.

Various portfolio's can be created, in order to get meaningful collections of related programmes and projects, e.g. a portfolio of projects that have the same sponsorship or all projects that contribute to the same strategic goal(s).

To work with portfolio management, the following activities are of importance:

- Defining new portfolios
- Administering portfolios
- Managing portfolios 91
- Creating a portfolio model 94

These subjects will be covered in the sections below.

3.2.1 Portfolio dashboard

The portfolio dashboard allows a portfolio manager to group portfolios in providing a clear overview.

Home Portfolio Management Organisati	on Resource Allocation	Time Entry Import /	Export					Erik Aalt	ersberg 👻 Hel	o Suppor	t Setup 👻
Portfolio Management > Portfolio Division (I	UK)										
Dashboard Properties - Financials P	Portfolio Gantt Documents	Archive									
Portfolio: Portfolio Division (U	^{јк)} (8)	Edit Properties	Edit Members	Customise	Page Text	Edit Field Co	nfiguration	Edit Page Layout	Edit Widgets		a
Name: Portfolio Division (UK) Description: Status:	Portfolio Overview Overview of all projects wit Maximum amount of FTE a	hin Fortes with their p available is 13. If more	riority and required is needed, hiring w	FTE per qua vill be necess	rter. ary.		\langle	9			
Status Description:				7	$\mathbf{)}$						
Automated Report	Projects (Portfolio Mana	agement) Edit	New Send report	request S	Save as versio	on Archive	Move	* Portfolio Ov	erview 🔻	View Op	tions 👻
Importance vs R	Name	Current Stage	Project Manager(s)) Status	Planning Status	Hours Status	Costs Status E	ind Date			
	🚍 Apollo project	Project initiation	Arjan van der Laar	•	•	•	9 1	6-Apr-2013			
Reports	∛ç- Minsk		Ruud Peltzer	•	•	•	2	3-Jan-2011			
Projects (Portfolio Management)	🚍 Omega Project	Opstartfase	Erik Aalbersberg		•	•					
Products / Plan Items	Venus	Preparation stage	Peter Cole	•	•	•	9 1	8-Aug-2010			
Issues Risks	E Zeus Project			•	•	•	- •				
Quality reviews (3)											
Changes Actions	Previous versions						Remo	* All Previous	Versions	View Or	tions -
Lessons learned	Name	Saved On	Saved By	Rema	rks hv Owner						
Cost / Hour Entries	March 2010	23-Mar-20	10 Erik Aalbersl	berg							
Linito	April 2010	23-Mar-20	110 Erik Aalbersl	berg							
Timeline Reports	Papart Models							N	our Import I	wheet	Arabiyo
Entries 4	Neport models			\frown				N	ew import i	spon	Archive
	Name 🌲	Objective		(5							
	Wookh Report	Monthly P	rogress Report								
	чисскиу кероп	vveekly P	ogress Report	\sim	·						

Portfolio Dashboard

1. General portfolio properties

This section displays basic information like, name, description, status and a status description. The information can be edited by the portfolio manager by using the **'Edit Properties'** button.

2. Automated Reports

Displays a list of the Automated Reports 127 that are available on the selected portfolio.

3. Reports

Shows the different categories of reports which can be used to show lists of projects, products, issues etc. for the portfolio items contained within the active portfolio.

4. Timeline Reports

Displays a list of the timeline reports that are available on the selected Portfolio. Timeline reports allow the user to display data over a certain period, like cost information. The horizon and resolution of the table or graph can be set by the portfolio manager.

5. Report Models

The reporting of project data to the portfolio manager is based on a report model. Each portfolio can have multiple report models to support different reporting cycles, for example: a monthly highlight report and a detailed reporting model for each quarter.

6. Previous Versions

Lists all the previously saved versions of the Portfolio. This allows the portfolio manager to go back in time and compare the portfolio's status between versions. The latest status of the portfolio is saved by using the button **'Save as version'**.

7. Portfolio item actions

This bar contains buttons for all the actions that can act on the individual (or a selection of) portfolio items. Some of the actions are 'Save as version', 'Send report request' and 'New'.

8. Tabs

Each portfolio contains the same tabs. Which tabs are shown may depend on the organization's license: the presence of some tabs is linked to the availability of a certain module. The purpose of each tab:

Dashboard	:	as per the detailed description above.
Properties custom fields	:	lists all the basic information of the Portfolio, including any
Financials	:	the financial overview tab displays the entered budgets,
actual costs and the forecast.		
Portfolio Gantt and end dates.	:	shows all the portfolio items in a Gantt based on their start
Documents portfolio and their items.	:	a common repository for all documents relating to the
Archive	:	lists all the archived portfolio items, and allows for items to be

deleted or recovered from the archive.

9. Portfolio actions

This bar contains a number of actions which act on the active portfolio.

Edit properties	:	allows for editing the name, objective, the status and status
description of the portfolio.		to change who gets full or read access to the portfolio
	:	to change who gets full of read access to the portfoliolo
dashboard	•	for customizing the introductory text on the portiolio's
Edit Field Configuration	:	the field configuration determines how data needs to be
synchronized between projec	t and po	rtfolio item.
Edit Page Layout	:	edit the page layout of portfolio items, letting the portfolio
manager determine what field	ls are im	portant and how to display them.
Edit Widgets	:	Add and edit widgets on your portfolio dashboard.

3.2.2 Working with portfolios

3.2.2.1 New portfolios

3.2.2.1.1 Defining new portfolios

The portfolio management module allows you to manage your business projects and ideas in portfolios. In order to do this, one or more portfolios need to be defined. For example a portfolio for every business unit or regional department in your organization, or a portfolio could consist of all projects that contribute to a strategic objective of your organization.

Defining a new Portfolio

 Navigate to the Portfolio Management module in the dark blue header on the top of the screen. In the main window the Portfolio Management module is displayed, with three tabs: "Dashboard", "Archive" and "Models". The tab "Dashboard" is opened by default. 2. Click **New** on the dashboard to define a new portfolio. A popup window will appear in which de details of the new portfolio can be entered.

Portfolio Manageme	ent					Edit Prop	erties	Edit Mer	mbers Customis	e Page Text		•	Q
Automated Reports	Edit	Portfolios			New	Archive	Create	e Model	* Dashboard	•	View	Optior	IS -
Eelang vs Risico		Name 🚖	Status	Portfolio Manager(s)	_								
Projectkalender (NL)		Portfolio Divisie (NL)	٠	Jeroen van Barneveld									
		Portfolio Division (DE)	•	John Edwards									
Reports Portfolios		Portfolio Division (FR)	•	Yung Ji-Lao									
Portfolio Dashboards Projects (Portfolio Manageme Products / Plan Items	nt)	Portfolio Division (UK)	•	Ruud Peltzer									
Issues													
Risks Quality reviews Changes		Portfolio Dashboards				I	New	Archive	* Dashboard	Ŧ	View	Optior	IS 🔻
Actions		Name 🚖		Description					Status	Portfoli	Manag	er(s)	
Lessons learned Cost / Hour Entries		Portfolio Dashboard - Fortes		Fortes Solutions Dashboard					•	Henk V	sser		
Entries													
		Portfolio Models								Import	Export	Arcl	nive
Timeline Reports		Name 🔶		Description									
Entries		Portfolio model		Default Portfolio Model									
		Portfolio Model (NL)		Portfolio Model from the Netherlands									

Portfolio Management module

3. Click **OK**. You will now return to the portfolio dashboard where all portfolios are listed, including the new portfolio you just created.

3.2.2.1.2 Portfolio items

When opening the Portfolio Management module, which is found in the top blue bar at the top of the screen, an overview of all portfolios is shown. Click on the name of one of the portfolios to open it.

A portfolio contains portfolio items of which there are various types:

- Initiative: a business idea that may well be turned into a project in the future
- **Single Sheet Project**: a simple type of project without detailed plan
- **Project**: a standard project with a plan, which is managed using the project management side of the Principal Toolbox

A portfolio item can be used to store management information like the budget, information about resources, planning information, and the goals of the project. How to create a portfolio item is explained in this section: Creating portfolio items [86].

Each type of portfolio item has its own icon:

Initiative:	-Q-
Single Sheet Project:	3=
Project:	F

3.2.2.1.3 Creating portfolio items

From inside a portfolio, new Ideas, Single Sheet Projects and regular Projects can be created which become part of that portfolio. A regular Project that is created and started from a Portfolio will automatically appear as a project on the Project Management side of the Principal Toolbox. However, a Project that was started from the Project Management module, will not automatically be associated with a Portfolio. To put a link in place between an existing Project and a new Portfolio item, please refer to 'Modifying the project reference'

When using the Portfolio Management module it's good practice to always create and start projects from within a Portfolio. This way it's guaranteed there's always a link between each Portfolio item and its corresponding Project. This way of working can be enforced by the Principal Toolbox. By enabling this setting it will prevent any project from starting without having been assigned to a portfolio.

To enable this setting:

- 1. Click on Setup and select Configuration.
- 2. Click on Principal Toolbox on the left side of the screen.
- 3. Change the setting 'Projects can be started from within portfolios only' to Yes

Up next are detailed instructions on the various ways projects and initiatives can be created and started.

Creating an Initiative

1. Open a portfolio and click on New to create a new entry in the portfolio.

Pro	jects (Portfolio Man	agement) Edit	New	Send report requ	lest	Save	as version	Archive	Move	\boxtimes	* Portfolio Overview	Ŧ	View Options -
	Name	Current Stage	Pi	roject Manager(s)	Sta	atus	Planning Status	Hours Status	Costs Status	En	i Date		
P.	Apollo project	Project initiation	A	rjan van der Laan			•	•	•	16-	Apr-2013		
-Q-	Minsk		R	uud Peltzer					•	23-	Jan-2011		
$[\mathbb{P}_{i}$	Omega Project	Opstartfase	Er	rik Aalbersberg			•	•	•				
Ρ.	Venus	Preparation stage	Pe	eter Cole			•	•	•	18-	Aug-2010		
5=	Zeus Project				•		•	•	•				

Starting a project on the portfolio

- 2. Enter a name for the Portfolio Item, and the objective and remarks (optionally).
- Assign a Project Manager to the new portfolio item (in case the portfolio item is converted to a project later on, the project will be automatically assigned to the project manager specified here).
- 4. Do not start a project: an Initiative is just an idea without an actual project being underway.
- 5. Click on **OK** to create the portfolio item.

Note: in case an existing Project needs to be associated with the newly created Initiative, then please follow the steps above followed by the instructions in <u>Modifying the project reference</u>⁸³.

Starting a Project when creating an Initiative

- 1. Follow the same procedure as when creating an Initiative (see above), but choose for **Start Project** when entering the details.
- 2. Next, choose the Project Model the new project should be based on, and choose a Programme the new project will be made part of.
- 3. The new project will automatically appear within the Project Management module. The Project Manager will have full access to the new project and can start entering a plan and team members as required.

Add Project (Portfolio M	anagement)
Project (Portfolio Mana	gement) Properties
Name:	
Objective:	
Remarks by Owner:	
Project Manager:	Henk Visser
Start Project:	Start Project
Project Model:	PRINCE2 project model (EN)
Programme:	Production (EN)
OK Cancel	

Starting a new project

Note: The newly created project will appear in the Project Management Module of the Principal Toolbox. It will be assigned to the project manager (as chosen when creating the Initiative) and is associated with the portfolio item.

Starting a Project from an existing Initiative

- 1. Open the portfolio item (initiative) and click on the button Start Project to start a project
- 2. Choose which Project Model to use, and in which Programme the project should be created
- 3. After pressing **OK** the Project will be created. The icon of the portfolio item will have changed from in to repeating that the Project has started.

Starting a Single Sheet Project

- 1. To create or start a Single Sheet Project one follows the same procedure as when starting a regular Project, but when selecting the project model specifically choose the Single Sheet Project model.
- 2. Then choose the programme in which to create the project and press **OK**
- 3. The Initiative is now associated with a Single Sheet Project that is also visible to the Project Manager from the Project Management module.

Note: the Single Sheet Project model is a simplified version of the regular project models.

3.2.2.2 Portfolio administration

3.2.2.2.1 Moving portfolio items

Portfolio items, whether they're Initiative or Projects, can be moved between Portfolios. This is achieved as follows:

- 1. Inside the portfolio that contains the item that needs moving, highlight the portfolio item and press **'Move'**.
- 2. The window that appears allows you to select the destination portfolio.

ortfolio Management > Portfolio Division	(UK)									
ashboard Properties - Financials	Portfolio Gant	Documents	Archive							
Portfolio: Portfolio Division	(UK)		Edit Properties	Edit Members	Customise Page Text	Edit Field Configuration	Edit Page Layout	Edit Widgets		Q
Name: Portfolio Division (UK) Description: Status: Description:	Portfolio Ov Overview of a Maximum an	erview all projects withi lount of FTE av rincipal Toolbox	n Fortes with their j ailable is 13. If mor ® (Principal) - Win	priority and require e is needed, hiring idows Internet Exp	ed FTE per quarter. g will be necessary.	×				
Automated Reports Edit	Proj	ove Project Select the appr	.nl/Principal/online ts (Portfolio N opriate Portfolio to	e/Folder/functions	/AddEditFolder.jsp?PageE between Portfolic (Portfolio Management) to	Def=P2 chive Move s Cusis us Status	Portfolio Ove End Date 16-Apr-2013 23-Jan-2011	rview 🕞	View Option	ons∣▼
Projects (Portfolio Management) Products / Plan Items Issues Risks	F C F V B Z - I	elected Project Minsk	s (Portfolio Mana	gement) to move			 18-Aug-2010 			
Quality reviews Changes Actions Lessons learned Cost / Hour Entries Entries	Prev Name Marc April	elect Portfolio ortfolio:	to move to	Divisie (NL)		Remo	* All Previous V	/ersions 🔍	View Option	ons -
Timeline Reports Entries	Rep	K Cancel	Portfolio Portfolio Portfolio Portfolio	Division (DE) Division (FR) Division (UK)			Ne	ew Import E	Export	chive
	Weekly Rep	ort ort	Monthly F Weekly F	Progress Report Progress Report						

Moving a project

3.2.2.2.2 Modifying the project reference

Projects that are underway but have not been assigned to a portfolio, are not visible from the Portfolio Management module. They can be added to a portfolio by creating a new portfolio item and manually link it to the existing project. Follow these steps to establish the link:

- 1. Open the portfolio item (initiative) and click on the button Edit Project Reference
- 2. Select the project that the portfolio item needs to be linked by typing the first few characters and choosing the correct one
- 3. Click 'OK' to establish the link

Change Project Reference
Here you can change the project reference for this project. When changing the project reference, related data is not automatically linked to this portfolio project. This especially concerns existing entry data. New entry data will be created according to applicable configuration.
Select a project
Project: Apollo Projekt
OK Cancel

Editing the project reference

3.2.2.2.3 History log

One of the tabs off the dashboard of each portfolio item is labeled **History**. On this tab a history is recorded of all changes that have been made to the portfolio item through time. It makes it possible to check who made which changes when.

Dashboard	Properties	Financials	Portfolio Gantt	Documents	Archive			
Portfolio	: Portfolio	Division	(UK)					
Person		Date	Object			Action	Change	
Erik Aalbers	sberg	11-Oct-2011	I Portfolio D	ivision (UK)		Change	Name=Portfolio Division (UK)	
Erik Aalbers	sberg	11-Oct-2011	Portfolio D	ivision (UK)		Change	Name=R&D Portfolio	

Historie Tab on a portfolio item

3.2.2.2.4 Portfolio documents

Documents can be attached to the portfolio items or to the portfolio itself. The latter may be useful in cases where the document is applicable to all (or most) portfolio items.

Dashboard	Properties -	Financials	Portfolio Gantt	Documents	Archive						
Portfolio	: Portfolio	R&D (UK	.)								Q
Document	folders	New	Current folder:	Knowledge	Repository						Edit
E Knowle	dge Repository										
Subt	older		Documents (fi	les, links, tex	t)		Add	Add Note	Remove	Show History	Update
			Name			Description		Revision	Published	Publisher	
			Resource_a	Illocation_v5.do	C	Resource Overv	iew		11-Nov-201	1 Erik Aalbersbe	erg
			Balanced_S	core_Card.xls		Balanced Score	Card	1.4	11-Nov-201	1 Erik Aalbersb	erg
			Training_Fu _v3_print_v	nctioneel_Beh ersi	er	Expert Training		3.2	11-Nov-201	1 Erik Aalbersb	erg

Documents on the portfolio

To attach, update or remove documents from the portfolio, navigate to the Documents tab from the portfolio dashboard. This will open the document library and show all the documents stored within the Portfolio. Where each portfolio has a library, the Enterprise level also has a library which can be used for centrally storing documents.

For more information on document management with the Principal Toolbox, please refer to <u>Document</u> management and approval 58⁻.

3.2.2.2.5 Portfolio archive

A portfolio and each individual items can be archived by pressing the button **'Archive'**. Those portfolios or portfolio items that are selected when pressing Archive will be moved from the active list in to the archive.

The archive and all the archived items are accessible through the Archive tab on the dashboard. The archived portfolios and items can be restored from the archive when required.

Please be aware that archiving a portfolio or one or more of its items does not also archive the projects that are associated with them. If the projects need to be archived as well, this needs to be done from the Project Management module.

3.2.2.2.6 Versioning

To keep a record of historic portfolio data, the Principal Toolbox allows the user to make a snapshot of a portfolio in time. By doing so, the current version of the portfolio is kept and at a later time, it can be compared to other snapshots or to the current version of the portfolio.

Creating a snapshot

- 1. Open the dashboard of the portfolio
- 2. Use the 'Save as version' button to create a snapshot of all portfolio items within the portfolio
- 3. Give the version a name and optionally some notes and press OK.

The stored versions of the portfolio are displayed on the dashboard under the 'Previous versions' section. A saved version can be opened and referenced by clicking on its name.

Dashboard Properties - Financials	Portfolio Gantt Documents	Archive												
Portfolio: Portfolio Division ((UK)	Edit F	roperties	Edit Members	Customi	se Page Text	Edit Field C	onfigurati	on E	dit Page Layout	Edit Wide	gets		<u>م</u>
Name: Portfolio Division (UK) Description: Status: Status Description:	Portfolio Overview Overview of all projects wit Maximum amount of FTE a	hin Fortes witi wailable is 13.	h their prior If more is i	ity and required FT needed, hiring will b	E per qu be neces	arter. sary.								
Automated Reports Edit	Projects (Portfolio Mana	agement)	Edit Ne	ew Send report re	equest	Save as version	n Archive	Move	\boxtimes	* Portfolio Ove	rview	-	View O	otions -
Importance vs Risks	Name	Current Stage	P	roject Manager(s)	Status	Planning Status	Hours Status	Costs Status	End D	ate				
	🚍 Apollo project	Project initiation	on A	rjan van der Laan	•	•	•	•	16-Ap	r-2013				
Reports	ුං Minsk		R	luud Peltzer				•	23-Jar	1-2011				
Draigeste (Dertfelie Management)	🚍 Omega Project	Opstartfase	E	rik Aalbersberg		•	•	•						
Projects (Pontono Management) Products / Plan Items	- Venus	Preparation st	age P	eter Cole					18-Au	g-2010				
Issues	Zeus Project													
Risks Quality reviews								-						
Changes												_		
Actions	Previous versions							Re	move	* All Previous '	Versions		View O	ptions 👻
Lessons learned	Name	S	aved On	Saved By	Rem	arks by Owner								
Entries	March 2010	2	3-Mar-2010	Erik Aalbersberg	1									
	April 2010	2	3-Mar-2010	Erik Aalbersberg)									
Timeline Benerte												_		
Entrine Reports	Report Models									N	ew Impor	rt E	nort	Archive
Linnes	Name A	0	hiantiya								in and a		ipon	
	Monthly Report	0	lonthly Prog	rase Denort										
	Weekly Report	V	leekly Progr	ess Report										
			reently r rogi	eee report										

The 'Previous versions' section on the portfolio dashboard.

Note: it is possible to generate reports based on data of previous versions of portfolios. That way it is possible to compare and analyze the data through time.

3.2.2.3 Managing a portfolio

3.2.2.3.1 Generating reports

To keep on top of all projects and items within the portfolio, various reporting capabilities are available.

- Automated reports: these are reports based on Excel or Word. The reports allow for flexible and powerful ways of extracting and summarizing information about the portfolio. Please refer to Automated Reports [127] for more information on setting these type of report up.
- **Reports:** these type of reports are contained in the Principal Toolbox and can be used to show table structured overviews of the different entities in the tool, for example products, risks, issues or cost entries.
- **Timeline reports**: displays an overview of data across a period of time. For example the costs per month over the duration of the project, or the number of hours a resource has been allocated to the project for the next period. More information on setting up timeline reports can be found in <u>Timeline</u> reports 144.

3.2.2.3.2 Requesting reports

The Portfolio Management module allows one to introduce a periodic reporting cycle. The report is requested from the Portfolio side and appears on the project where the project manager can fill it out. Once the Project Manager publishes the report, it updates the information within the portfolio which allows the portfolio manager to stay up to date with the project status. For setting up such a report model, please refer to the section 'The reporting model status'.

When a report model has been set up, it can be used to request status information on the projects that are part of the portfolio.

Requesting a report

To send a reporting request to the project manager, please follow these steps:

1. In the opened portfolio, select one or more projects (portfolio items linked to projects). Selecting more than one project at a time can be achieved by using the shift or control button while selecting. Once selected, press the **'Send report request**' button. A window will appear in which the report properties can be chosen.

2. Specify the due date for the report, followed by the report model it should be based on, and if required, send some additional instructions or remarks with the report request.

Home Portfolio Management Organisa	ition Resource Allocatio	n Time Entry Import / Exp	port				Erik Aalbe	rsberg 👻 Hel	o Supp	ort S	etup 🔫
Portfolio Management > Portfolio Division	(UK)										
Dashboard Properties - Financials	Portfolio Gantt Docume	ents Archive									
Portfolio: Portfolio Division (UK)	Edit Properties	Edit Members	Customise Page Te	Edit Field Con	figuration	Edit Page Layout	Edit Widgets		ė	Q
Name: Portfolio Division (UK) Description: Status: Status Description:	Portfolio Overview Overview of all projects Maximum amount of FT	within Fortes with their prior E available is 13. If more is	ity and required F needed, hiring wil	TE per quarter. Il be necessary.							
Automated Reports Edit	Projects (Portfolio M	anagement) Edit Ne	ew Send report	t request Save as v	ersion Archive	Move	* Portfolio Ove	rview 💌	View (Option:	5 -
Importance vs Risks	Name	Current Stage F	roject Manager(s)	Status Planni Status	ng Hours Co Status Sta	sts End	Date				
Reports Projects (Portfolio Management) Projects (Plantilio Management) Issues Reals Reals Conally references Conally references Conally references Lessons learned Coot / Hour Entities Entities Entities Entities Entities Entities Entities Entities Entities	Anjour project Minsk Minsk Minsk Monsk Vens Zeus Project Previous versions Name March 2010 April 2010 Report Models Name Monthy Report Weebly Report	Principal Toolbox (Pm) Http://sspfortes.nl/Prin Send Report Reque Send a report request rounded to the first da Selected projects - Apollo project - Zeus Project Report Request Forecast start date	ncipal) - Window ncipal/online/Fol uest for the selected y of the selected	der/functions/AddEdi project(s). The Forace time scale, e.g. first d	Folder,jsp?PageDef	e will be ter or month.	All Previous \	Versions 💌	View (Option: Archi	s •
		Report Model Due date Request Remarks		Monthly Report	T	*					
		Send notification by e-	nail	Ø		÷					

The report request will be send to the selected projects

3. If required, the project manager can be send an additional email as a notification that a report request has been submitted. To have an email sent, just tick the box **'Send notification by e-mail'**.

Writing and submitting a portfolio report

Once the report request has been submitted, the report itself will appear on the **'Portfolio Report'** tab of the project. To fill the report out, the project manager follows these steps:

1. From the project dashboard, the project manager opens the 'Portfolio Report' tab and presses the 'Edit' button.

Dashboard	Properties +	Product Breakdown	Plan Ga	tt Resource Management -	Documents -	Portfolio Report	Reports	Guide	Plaza				
Apollo P	roject											Save	Cancel
Portfolio:		Portfolio ICT (NL)								Last Published On:	28-Feb-2011		
Due date:		Politiono ICT (NC)								Last Published By:	20-1 60-2011		
Report Stat	us:	29-Jan-2013								Request Remarks:	Erik Aalbersberg		
		•											
Forecast st	art date:	01-Jan-2013											
Properties													
General													
Name:		Apollo Project											
Project Man	nager(s):	Peter Cole											
Start Date:		28-Dec-2012											
End Date:		03-Apr-2013											
Progress													
Tijd:		•				Status (Tiji Status (Ge	d): Id):		-				-
Geld:		•				Status (Pla	inning):						
Planning:						Status (Re	sources):						
Resources:													
		• •											
Budget:			А	tual:		ETC:				EAC:			
		150,000.00			100,000.00				7	5,000.00	175	5,000.00	

The report can be filled in by project managers, after which it can be submitted to the portfolio manager

2. The project manager then fills out all the fields that are editable. Not all fields will be editable: some

may be automatically calculated, like financial information.

3. When done, the project manager presses the 'Save' button, followed by the 'Publish to Portfolio' button.

Monitoring the report status

From the portfolio, the portfolio manager can monitor the status of the report requests that were sent out. (Note: it may be necessary to add the field 'Report Status' as a column to the active view on the dashboard).

The status of the latest report request is identified by these icons:



As soon as a portfolio report has been submitted by the project manager, the data on the portfolio item is updated with the latest data as provided by the project manager.

Pro	ojects (Portfolio	Management)	New	Send re	port request	Save as version	Archive	Move	\bowtie	Report F	Request	•	View Options -
	Name	Request Date	Due	date	Report Status	s Last Publi	shed By	Last P	ublishe	d On	Report Model		
F,	Apollo project	21-Oct-2010			X	Jeroen va	n Barneveld	16-Ap	r-2010		Monthly Report		
ġ.	Minsk												
F	Omega Project	15-Feb-2013	18-F	Feb-2013	X						Monthly Report		
F,	Venus	23-Apr-2010	01-4	Apr-2010	•						Monthly Report		
3=	Zeus Project	16-Apr-2010	28-4	Apr-2010	1	Erik Aalbe	rsberg	04-Oc	t-2010		Monthly Report		

The dashboard shows the status of the report request

3.2.2.3.3 Financials

Each portfolio can be used to generate financial overviews based on the individual portfolio items. The financial overview gives insight into budgets, actual and committed costs, and the latest financial forecasts. The financial overview is found in different places within the Principal Toolbox. These are:

- The 'financials' tab on each portfolio item
- The 'financials' tab on each portfolio, which gives an overview of all portfolio items contained in the portfolio
- The 'financials' tab on the portfolio report, which is found on the project once a report has been requested (it's the information entered here that's used to populate the tabs on the portfolio and its items).

The financial overviews can be configured in many ways to suit different needs. Please check <u>'Financial configuration</u>' [99] for more details on how to configure the financial overview.

Dasht	ooard	Properties -	Financi	als Portfoli	o Gar	ntt Docur	nents	Archiv	re													
Port	folio	: Portfolio	Divisio	on (DE)														Financ	e Configu	ration	Set Curre	nt Period
Th we res	e finan ell as the striction	ce overview fo e preceding an n on dates).	r the port nd succee	folio shows i ding periods	nform ; (if co	nation on b onfigured).	udget: The c	s, actual current p	s and eriod	commitmen can be set u	its as we ising the	ell as the l Set Curr	atest fore ent Perio	cast. The d' functior	overviev . Note th	r shows th at the proj	e financia ect totals	I informati summari	tion for the se all avai	current f able info	inancial p mation (r	eriod as
Fina	nce																					Edit
V I	Project 1	Totals 📝 Pred	ceding Per	riod 📝 Cun	ent Pe	eriod 🔽 T	ime so	cale colui	mns	Succeedi	ng Perio	d ++	- 🖴	Select of	olumns to	display						
	Reserve	ed 📝 Budget	V Actua	al 📝 Foreca	ist 🔽	EAC	Estin	nate 📄	Varia	nce												
												Precedir	ng Period									
									Proje	ct Totals		< Ja	n (13)		Jan (13)		Feb (13)			Mar (13)	
Тур	Pro	ject > Category	у 🔶	Forecast st	⇒ Li	ast Publis	⇒ Bι	udget	Actual	Forecast	EAC	Budget	Actual	Budget	Actual	Forecas	Budget	Actual	Forecast	Budget	Actual	Forecas
	Silter	by		8	~ 6	3	× .															
F		ollo																				
9		insk																				
F	+ Ve	enus																				
١		us																				
												•										- F

The financials overview on the portfolio

3.2.2.3.4 Notifications

Email notification

Use this button to send an email to the project manager of the project from within the portfolio. For example, this could be used to remind the project manager to fill out the pending portfolio report.

3.2.2.3.5 Portfolio Gantt

Each portfolio dashboard contains a tab 'Portfolio Gantt'. The Gantt chart shows the start, end-date and duration of all portfolio items within the portfolio.

Dashboard Properties -	Financials Portfolio	Gantt Documents	Archive
Portfolio: Portfolio	Division (UK)		
This Gantt shows project	s and ideas as part of	this portfolio.	
Portfolio Gantt			E
Select columns to display	Timescale: Months a	nd weeks	* 🖴
Tyr Projects and Ideas	🔶 Start Date 🗧	End Date 😝 10	May 2010 Jun 2010 Jul 2010 Aug 2010 Sep 2010 Oct 2010 Nov 2010 Dec v. 26. 3. 10. 17. 24. 31. 7. 14. 21. 28. 5. 12. 19. 26. 2. 9. 16. 23. 30. 6. 13. 20. 27. 4. 11. 18. 25. 1. 8. 15. 22. 29. 6. 1
Filter by	() ()	· 🛛 🗸	
Apollo project	31-Dec-2012	2 16-Apr-2013	
Search Minsk	27-Sep-2010	23-Jan-2011	
Omega Project			
Venus	05-Apr-2010) 18-Aug-2010	
📋 Zeus Project			
_			< III

The portfolio Gantt

Using the Gantt, dependencies between portfolio items can be defined. In order to do so, follow these steps:

- 1. Press the 'Edit' button
- 2. Click and hold the button down on one of the bars.
- 3. Then drag the cursor to one of the other bars to make an arrow appear.
- 4. Drop the arrow onto one of the other bars to create the dependency.

Note: to remove a dependency, right-click on the arrow and choose one of the 'disconnect' options that appear.

From within the Gantt, the start and end date of the portfolio initiatives (not currently active projects) can be changed as well. Just click on the start or end of one of the bars, and drag it to the required date. The same can be done by entering the dates on the left-hand side in the date fields.

3.2.3 Portfolio model

Each portfolio can be based on a portfolio model. Using a model ensures portfolios are configured in one (or more) identical ways.

Items which are part of the model:

- The page lay-out of the portfolio items
- The reporting model
- The automated reports (please see <u>Automated reports</u> 127) for more information)
- The field configuration
- The financial configuration

Note: all of the above items can also be set on each individual portfolio after it has been created

Dashboard Finar	cials Portfo	olio Gantt	Documents	Archive											
Portfolio Mo	iel: Portf	olio Mo	del - IT	Edit Properties	Edit Members	Customise Pag	e Text	Edit Field Configur	ation	Edit Page Lay	out	dit Widgets		۵	Q
Name: Po	tfolio Model -	п													
Description:															
Status:															
Status Description:															
Automated Rep	orts	Edit	Projects (P	ortfolio Manager	nent)				Nev	W All Project	s		View	Optior	15 -
Importance vs	Risk		Name		Last Published Cu On	rrent Stage	Projec	t Manager(s)	Status	Planning Status	Hours Status	Costs Status	End	Date	
Reports			Previous v	ersions						* All Previ	ous Ver	sions	View	Optior	ns 🔻
Projects (Portfolio I Products	(lanagement)		Name		Saved On	Saved By		Remarks by Owner							
Issues															
Risks Quality reviews			Report Mo	iels							New	Import	Export	Arch	nive
Changes			Name 🔺		Objective										
Actions			Monthly Ren	ort	Monthlu ai	alua undata									
Lessons learned			Weekly Rep	art	Monthly S	atus update									
Entries			- Teolay Ropa		weekly at	atus upuato									
Timeline Report	5														
Entries															
			·												

Example portfolio model

3.2.3.1 Defining a project sheet

The page lay-out of the project sheet, which is shown when opening a portfolio item, can be customized for each portfolio or portfolio model. The project sheet can be used in displaying the basic project or initiative properties, including custom fields and status information. The page lay-out is defined by:

- 1. From the Portfolio Management dashboard, open a portfolio model or one of the existing portfolios.
- 2. Press the button 'Edit Page Layout'.
- 3. A new windows opens of which the left-hand allows for defining the layout, whilst the right-hand side contains a list of all fields and properties that can be dragged onto the layout side.

Portfolio Model - IT				
ion:				
Principal Toolbox® (Demo) - Windo	ws Internet Explorer provided by Principa	I Toolbox		
Change Page Layout				Save Cancel
Here you can change the page lay	out. You can drop sections and fields into	the page layo	ut section.	
Default name layout (deletes custor	n lavout)			
 Custom page layout 	n layouty			Layout Components
Dana lavaut				Available Dage Components
Fage layout				Avanable Page Components
Algemene informatie		m á		Page section
Name				
Objective			Remove	Grid
Project Manager(s)			4	
Project Board - Executive			Add	
Project Board - Senior User			7444	
Project Board - Senior Supplier				Available Fields
Status Description				Baseline
Remarks by Owner			To add a new section drag one	Current Baseline Final
1			from the available sections on the right to the page layout on the	e Current Baseline Set
			left. After that you can add fields	Initial Baseline Final
Planning		Ξ.	from the available fields section.	Initial Baseline Set
Start Date	Status		From the available fields section	Initial Baseline Start
End Date	Planning Status		it to the page layout to add a	Cash
Progress	Hours Status		complete category of fields as a	Actual
			new section.	Costs Actual
			To remove a section click on it's trashcan icon. To remove fields	Costs Actual Cumulative
Kosten		Î	simply drag them out of the	Costs Budget
Costs Budget Cumulative	Costs Actual Cumulative	·····	section.	Costs Budget Cumulative
Costs Committed Cumulative	Costs Remaining Cumulative			Costs Committed
				Costs Committed Cumulative
1		i -	0	Costs EAC
Uron		-		Costs Planned
oren	,			Costs Remaining
Hours Budget	Hours Actual			Costs Remaining Cumulative
nours committed	nours Remaining			Costs Reserved
				0.1.01.1



3.2.3.2 The reporting model

Portfolio reports allow one to define a reporting cycle which allows data to be published from project level to the portfolio. To allow for this cycle to take place, a reporting model needs to be defined which specifies what information needs to be captured.

Creating a new reporting model

Each portfolio can contain multiple reporting models. Each model can be used for different reporting cycles. For example, one model could be used for a monthly reporting cycle and another one, more detailed report, for a quarterly cycle.

To create new reporting model, follow these steps:

- 1. From within the portfolio model (or from an existing portfolio), press the button **'New'** which is located in the header bar 'Report Models'.
- 2. In the new window that appears, enter a name and an objective for the new reporting model.
- 3. Press 'Save' to save the new reporting model.

Configuring the reporting model

The newly created reporting model uses some default settings. To customize the data that is to be captured follow these steps:

- 1. From within the portfolio model (or from an existing portfolio), click on the name of the reporting model that needs configuring.
- 2. Click on 'Model Configuration' and select the sections that are to be used in the report (property section and / or finance section).
- 3. The 'Properties' section can be configured by pressing the 'Edit Page Layout' button.
- 4. The new window that appears contains three sections: the new page layout (left-hand side), the layout components (right-hand side, top half), and a list of the available fields and properties (right-hand side, lower half). The page components and fields situated at the right-hand side can be dragged over the the left-hand side to build a custom page layout to be used in the reporting model.

Here you can change the particular	age layout. You can drop sections, compon-	ents and fields into the page layout secti	on	
Default name lavaut (delates	austem lavaut)			
 Default page layout (defetes Custom page layout 	custom ayour)		Lavout Componente	
Dama lavaut			Available Dage Comp	ononto
Page layout			Available Page Comp	Jonents
Overall			Page section	
Name				
Objective		Rer	nove Grid	
Status		1		
Status Description			dd	
Project Manager(s)			dd	
Project Board - Executive			Available Fields	
Remarks			Baseline	-
		To add a new s	ection drag one Current Baseline Final	
1		from the availab	le sections on the Current Baseline Set	
Planning		inght to the page left After that v	e layout on the ou can add fields Current Baseline Start	
Clad Data	Discrime Clather	from the availab	le fields section. Initial Baseline Final	
Start Date	Planning Status	From the availa	Initial Baseline Set	
Brogross		click on a categ	ory title and drag	
Flogiess		it to the page la	yout to add a Capacity planning	
		new section.	IT Capaciteit	
			PM Capaciteit	
Hours		trashcan icon. T	o remove fields	
Hours Budget	Hours Status	simply drag the	n out of the Budget	
Hours Actual		section.	Costs Actual	
Hours Remaining	·····		Costs Actual Cumulative	e
1			Costs Budget	
· · · · · · · · · · · · · · · · · · ·	2		Costs Budget Cumulativ	/e
Costs			Costs Committed	
CUBIS		,	Costs Committed Cumu	lative
Costs Budget	Costs Status		Costo EAC	
COSIS ACIUAI				

By dragging fields and page components from right to left, a new page layout can be defined.

- 5. Press the 'Save' button to save the new page lay-out
- 6. Besides the 'Properties' section, the 'Finance' section can be customized separately. Please refer to <u>'Financial Configuration'</u> (1997) for more information.

3.2.3.3 Field configuration

Fields and properties which are used on the project sheet to show information about the portfolio item are not automatically linked to the corresponding fields on the project. It is possible to set the behaviour between these fields using the 'Field Configuration' button. Customizing the behaviour between fields is mostly applicable to custom fields, although it can be changed for some pre-defined fields as well.

Custom fields are added at project level and automatically appear on the Properties tab of the project and the project sheet of the portfolio items (unless a custom page lay-out has been defined, which means they have to be manually added). Although the fields at project and portfolio level appear to be the same, since they're carrying the same name, their behaviour and therefore content may differ.

The behaviour of these fields is defined within the portfolio or on the portfolio model.

Dashboard Properties - Financials	Portfolio Gantt Documents Archive								
Portfolio: Portfolio Division	(UK) E	Edit Properties	Edit Members Cu	stomise Page Text E	dit Field Configuration	Edit Page L	ayout Ec	dit Widgets	
Name: Portfolio Division (UK) Description: Status: Description:	Portfolio Overview Overview of all projects within Fortes Maximum amount of FTE available is	with their priority 13. If more is ne	and required FTE pe eded, hiring will be no	r quarter. acessary.					
Automated Reports Edit	Projects (Portfolio Management)	Edit Ner	w Send report requ	uest Save as version	Archive Move	All Proje	ects		View Options
Importance vs Risks	Name	Last Publishe On	d Current Stage	Project Manager(s)	Status	Planning Status	Hours Status	Costs Status	End Date
	🚍 Apollo project	16-Apr-2010	Project initiation	Arjan van der Laan		•		•	16-Apr-2013
Pepete	- Minsk			Ruud Peltzer		•	•	•	23-Jan-2011
Reports	- Omega Project		Opstartfase	Erik Aalbersberg					
Projects (Portfolio Management)	- Venus		Preparation stage	Peter Cole				-	18 Aug 2010
Issues	Teus Project	04 Oct 2010	Treparation stage						10-Aug-2010
Risks	S: Zeus Project	04-001-2010			•	-	•	•	
Quality reviews									
Changes	Dreviewe versions				Dama				Manu Oatlana
Lessons learned	Previous versions				Remov	/e ^ All Pre	vious versi	ions 👻	View Options +
Cost / Hour Entries	Name	Saved On	Saved By	Remarks by Owner					
Entries	March 2010	23-Mar-2010	Erik Aalbersberg						
	April 2010	23-Mar-2010	Erik Aalbersberg						
Timeline Reports									
Entries	Report Models						New	Import E	Export Archive
	Name 🚖	Objective							
	Monthly Report	Monthly Progres	s Report						
	Weekly Report	Weekly Progress	s Report						
	L	····, · ···,							

The button 'Field Configuration' is found on the portfolio or the portfolio model, as highlighted above.

The following behaviours can be set for both the project and portfolio fields:

- Fields can be made available or be hidden
- Fields can be made editable or read-only
- Synchronization can be set: either off, or one-directional from project to portfolio or the other way
- Or the fields can be set based on a customized calculation (behaviour set to 'custom')

Note: Synchronization only works one way! It's either synchronized from project to portfolio or from portfolio to project, but not both ways.

Note: Only use 'custom' behaviour when told to by Fortes Solutions.

Changing the field configuration

- 1. From within the portfolio model (or an existing portfolio) press the button 'Field Configuration'. A new window will appear which contains a list of all project and portfolio fields and their behaviours.
- 2. Press 'Edit' to change the settings of the fields.

Portfolio Division (UK)

This page con Modifications t	igures the behaviour o o the standard field cor	f custom fields and syst nfiguration are shown in	em blu	fields for projects. Ie.							
Custom Fields	System Fields										
Custom Field	s									Save	Cancel
Category	Name	Portfolio Availability		EditLevel		Behavior		Project Availability		EditLevel	
Capacity planni	ng IT Capaciteit	Available	Ŧ	Editable	Ŧ	-	-	Available	-	Editable	
Capacity planni	ng PM Capaciteit	Available	Ŧ	Editable	Ŧ		-	Available	-	Editable	
Costs	Budget	Not Available	Ŧ	Editable	Ŧ		•	Available		Editable	
Costs	EAC	Not Available	Ŧ	Editable	Ŧ	-	•	Available		Editable	
Costs	ETC	Not Available	Ŧ	Editable	Ŧ		-	Available	-	Editable	
Finance	Total Actuals	Available	Ŧ	Not Editable	-	Synchronized	-	Available	-	Not Edital	ble
Finance	Total Budget	Available	Ŧ	Not Editable	-	Custom	-	Available	-	Not Edital	ble
Finance	Total Forecast (portfolio)	Available	Ŧ	Not Editable	Ŧ	Custom	Ŧ	Not Available	-	Not Edital	ole
Finance	Total Forecast (project)	No Local Configuration Not Available		Not Editable	Ŧ		•	Available	-	Not Edital	ble
Finance	Total Reserved	Available		Not Editable	-	Custom	•	Available	-	Not Edital	ble
	Actions Project Manager	Not Available	Ŧ	Editable	Ŧ]	-	Available	-	Editable	
	Assigned manually	Not Available	-	Editable	Ŧ	-	•	Available	-	Editable	
	Belang	Not Available	Ŧ	Editable	-	-	-	Available	-	Editable	
	Decision to be made	Not Available	Ŧ	Editable	-	Ì	×	Available	•	Editable	
	Delta Lloyd	Available	Ŧ	Editable	Ŧ	-	-	Available	-	Editable	

Field configuration

3. Choose one of the following combination of options on the project or portfolio side:

Settings	Options	Resulting behaviour
	No Local Configuration	No configuration applicable
Available	Not Available	The field will not be available for use at portfolio and / or project level
	Available	The field will be available for use at portfolio and / or project level
	No Local Configuration	No configuration applicable
	Not Editable	The field is not editable at portfolio and / or project level
	Editable	The field will be editable at portfolio and / or project level
Edit Level	Editable before project start	The field will be editable at portfolio level up until the moment the corresponding project has been created (this option is only available on the portfolio side)
	No Local Configuration	No configuration applicable
Behaviour	Synchronized	The field will be synchronized from portfolio to project level, or the other way around (one way only)
	Synchronized after project start	The field will be synchronized from project level to portfolio level as soon as the corresponding project has been created.
	Custom	The behaviour of the field is defined by a custom calculation as provided by Fortes Solutions

4. Press 'Save' to save the altered field configuration.

3.2.3.4 Financial configuration

Within the portfolio, the individual project sheets, and within the portfolio report on the project, financial overviews can be shown and filled out. The financial overview displays budgets, actual and committed costs, and a forecast.

The following items of the financial overview can be configured to suit different needs:

- The behaviour and the resolution of the fields Budget, Actual, Committed and Forecast.
- The financial period that should be displayed (current period, previous period and the period following the current one)
- The financial categories that should be displayed
- Other display options

Configuration

- 1. From the Portfolio Management dashboard, open a portfolio model or one of the existing portfolios.
- 2. Open the 'Financials' tab and press the button 'Finance Configuration'.

ashbo	oard Propertie	s 👻 Fina	ncials	Portfolio	Gantt	Documents	Archive	•											
Portf	olio: Portf	olio Divi	sion	(UK)										Fi	nance Co	onfiguratio	on Set (Current Pe	eriod
The curr tota	finance overvi ent financial pe Is summarise a	ew for the p riod as well Il available	ortfolio as the nforma	shows info preceding ation (no re	ormatic) and si estrictio	on on budge ucceeding p on on dates)	s, actuals eriods (if c	and o configi	commitme ured). The	nts as wel current p	l as the eriod ca	latest forec n be set us	ast. The ing the 'S	overview et Currer	snows un nt Period'	e inancia function.	n mormati Note that	on for the the projec) ct
Finan	ce																	I	Edit
V P	roject Totals 👿	Preceding	Period	Curren	nt Period	d 👿 Time s	cale colum	ns 🔽	Succeed	ling Period	+	- 6	Select o	olumns to	display				
V R	eserved 👿 Bu	dget 👿 Ad	tual 👿	Forecast	V E	AC 📄 Esti	nate 👿 🔪	/arian	ce										
													Pre	ceding Pe	riod				
									Projec	t Totals				< Jul (13)		Jul (13)	Aug (13)	Sep (13)	Oc
Тур	Project > Ca	egory	🔶 Foi	recast si 🤤	Last	Publis 😝 R	eservec Bu	udget	Actual	Forecast	EAC	Variance	Reserve	Budget	Actual	Actual	Actual	Actual	A
e	Filter by		0		· 🕲														

- 3. The window that opens allows the financial configuration to be changed
- 4. Select 'Use custom configuration', which will bring up more settings
- 5. The following items can be configured:

Financial periods :	Set the current financial periods, and whether to show the preceding
anu / ur next imanciai pent	
Behaviour :	Change who can edit which fields at which point in the process
Forecasting process :	Define which part of the period should be displayed for forecasting
purposes	
Financial categories :	Determine which financial categories will be available for use
Display options : attached	Choose whether to show financial categories which have no data

Finance Configuration

Configure Finance Process

Configure the financial periods to show within the financial overviews. The current financial period is based on the 'current period start' date. Select the categories to use within the portfolio. A custom configuration is only available when this is permitted at a higher level (Portfolio model).					
OUse configuration from related portfolio (mo	odel)				
Set Financial Periods					
Current financial period					
Starts on first of:	July 👻				
Time scale:	Per month 👻				
Duration:	1 💌	years			
Preceding financial period					
Show preceding period?	V				
Summarise all up to current period:	●Yes ●No				
Succeeding financial period					

Show succeedir	ng period?			
Summarise all a	fter current period:	⊙Yes ⊚No		
Time scale:		Per quarter 👻		
Duration:		2 vears		
Set Behaviour				
Configure how	w to work with the different fi	ncial types. Choose behaviour of the type and in what leve	el of detail the information should	be shown for the current period.
	Behaviour			Level of detail current period
Reserved:	Editable by portfolio manager	ot visible by project manager	-	Single value, complete current
Budget:	Editable by portfolio manager	sible by project manager	-	Single value, complete current
Actual:	Visible by project manager an	portfolio manager, values are imported / from time sheets	-	Per time scale, complete current
Committed:	Not used		-	Per time scale, complete current
Forecast/EAC:	Editable by project manager a	I published to portfolio manager	•	Single value, complete current
Set Financial Ca	ategories ble categories			
 Use selected 	categories:			
Selected Ca Capex Opex	ategories:	External		
Set Display Opt	tions			
The financial Note: When i	overview will always show a many categories are selected	inancial categories with data. Choose whether to show oth he performance may be affected.	er (selected) categories as well.	
Also show categ	gories without data	V		
OK Cancel				

6. Adding new financial categories is done from the **'Setup'** and **'Configuration'**, in the **'Financial categories'** section. This can only be done by an administrator.

Configuration								
Options	++	-	Manage Financial Categ	jories				
Principal Toolbox			Financial Categories		New	Remove	* All Categories	View Options
Notifications			Name 🌲	Description				
MS Project Integration			Capex					
Manage Hour Pates			Opex					
Project Plaza								
Currencies								
Resource Categories	_							
Financial Categories								
Manago Rossaroos								
Manage Skills								
 Time Entry 								
Manage entries								
Manage Non-project Acti	vity Sets							
Resource Allocation								
Customize fields								

Creating financial categories

3.3 Resource Allocation (add-on)

Resource Allocation supports the process of planning and managing resources on projects. The process can be carried out in different ways:

- Resources are requested at project level
- Resources are requested at product level
- Or a hybrid option: both at product and project level

Two roles are associated with this process:

- The **project manager** can request resources to staff his or her project. Resources can be requested as skill, or, if the project manager has a specific preference, as 'named' resources.
- The **resource allocation manager** (or '**resource manager**' for short) is the manager of one or more resource pools. As such, the resource manager registers resources, resource availability and resource skills. Furthermore, the resource manager manages resource requests from project managers by allocating resources to specific projects.

How to set up a resource pool, the resources, skills and the availability of the resources, is explained below.

Note: A user can be given resource manager rights in Principal Toolbox by an administrator. To do so, navigate to the Resource Allocation module and click on Edit Members.

Select members		
Resource Allocation Managers		Available users
Albert Swank	<- Add	Arian van der Laan
	Remove ->	Erik Aalbersberg
Resource Allocation Readers John Edwards Resource Allocation Members Theo van Wirdum Tom Maassen	<- Add Remove -> <- Add Remove ->	Herman Mulder Ivo Rings Jaroen van Barneveld Peter Cole Richard de Groot Ruud / Veride Suud Petizer Suud / Veride Suuport Administrator Yung Ji-Lao
OK Cancel		

Edit members for Resource Allocation

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3.3.1 Managing a resource pool

A resource pool and pending resource allocation requests are managed by a resource allocation manager.

- 1. Navigate to the resource pool that you would like edit.
- 2. Navigate to the "Resource Allocation" tab. In the "Request & Allocation" section, a grid is shown with requested, allocated, remaining and available hours per period for each resource.

The cells in this grid are color coded to provide a quick overview:

- **Blue cells** indicate resource requests that are not yet (fully) fulfilled with allocated resources.
- **Green cells** indicate remaining hours that can be allocated to projects or non-project related activities.
- **Red cells** indicate over-allocation of a resource in a specific period.



Overview of the entire resource pool

Note: The columns with planned, requested, and allocated hours can be toggled on and off by checking or unchecking the checkboxes directly underneath the header of the Request & Allocation section.

Note: If needed, the timeline setting of the grid can be edited. To do so, click on **Edit Timeline Settings**. Set the horizon and start date according to your preferences.

- Click Edit in the header of the "Request and Allocation" section to change allocation details of resources to various projects.
 Click on the '+'-sign in front of a project to expand that project and look at the details per resource. Alternatively, click on the '+'-sign in front of the top row "[All resource]" to view all resources in the resource pool without sections per project.
- 4. To allocate a resource, or change an existing allocation, edit the values in the "Allocated" columns for each resource per period.

Note: In case of a requested skill instead of a specific 'named' resource, first select the

resource with the requested skill as primary or secondary skill that you want to allocate before entering the allocated hours.

5. Click **Save** to save your changes. This will automatically send new or changed allocation details to the appropriate Project Managers.

3.3.1.1 Setting up a resource pool

Before you are able to request and allocate resources you will have to define one or more resource pools. To do this, you will have to define skills and then appoint these skills to resources. After you have done that, you can add resources to a resource pool.

Adding, removing and editing skills

In order to be able to define resources and their skills, a set of skills needs to be defined first. Skills have to be defined only once and can be used for multiple resources and resource pools. This allows you to report on skills over multiple resource pools.

- 1. Navigate to the Setup and Configuration in the dark blue header on the top of the screen.
- 2. On the left-hand side of the screen you'll find many options including 'Manage Skills'.

Configuration		
Options Principal Toolbox Notifications MS Project Integration Conversions Manage Hour Rates Propert Place Property Place Resource Calegories Francial Calegories Manage Stills Townsproject Activity Sets Resource Allocation C customize fields	Pick a subject on the left hand side to configure.	

Manage Skills at Setup

- 3. To add a new skill: Click **New** to add a skill (a popup window will appear in which the name of the new skill can be specified)
- 4. To remove previously defined skills: Select a skill (or select multiple skills by using the 'Control'-key) and click **Remove**.
- 5. To edit previously defined skills: Click on the name of the skill to be edited (a popup window with the skill details opens). Click **Edit** to edit the skill name.

Consultant (Jr.)			Save Cance
Name:	Consultant (Jr.)	Creator:	Erik Aalbersberg
Resource Category:		 Create Date: 	10-Feb-2010

Adding a skill

Adding new resources in Principal Toolbox

Before resources can be appointed to a resource pool, resources and their skills need to be defined in the Principal Toolbox. Users are automatically available as resources, additional resources can be defined by a resource manager as follows.

1. Navigate to **Setup** and **Configuration** in the dark blue header on the top of the screen. The left-hand side of the screen contains a link to '**Manage resources**'.

ne Portfolio Management Projectma	anagement Resource Alloca	tion Time Entry Pr	ince2 FAQ Project F	'laza Import / Exp	port			Erik Aalbersbe	rg - 1	Help Support Set
onfiguration										
options ++	. Manage Resources									
Principal Toolbox Notifications	Here you can manage There are two types	Here you can manage the resources for the resource allocation. There are two types of resources:								
 MS Project integration Conversions Manage Hour Rates 	 Resources th Resources th 	nat are <u>not</u> linked to a nat are linked to a us	a user account. Thes er account. For these	e resources can b e resources only so	e adde ome pr	ed, remo operties	ved and mo (like skill) c	dified freely. an be edited.		
Project Plaza Currencies	Resources (no users)				Edit	New	Remove	* Resources	Ŧ	View Options -
Resource Categories	Last Name 🌲	First Name	Primary Skill	Secondary Skill(s)	Emai	1		Phone		Remarks
Financial Categories Manage Resources	Bloemen	Pieter	Project Manager	Consultant (Sr.)	Peter	@mail.c	om	+31 53 2314	357	
manage onns	Resources (users)						Edit	* Resources	Ŧ	View Options -
 Manage entries 	Last Name 🚖	First Name	Primary Skill	Secondary Skill(s)	Emai	1		Phone		Remarks
Manage Non-project Activity Sets Resource Allocation Customize fields	Aalbersberg	Erik	Project Manager	Consultant (Jr.), Consultant (Sr.), Project Manager ICT	e.aal	bersberg	@fortes.nl	06 24 94 66	66	
Approvalentites	Administrator	Support			supp	ort@forte	s.nl			
	Cole	Peter	Software		p.col	e@fortes	.nl			
	Davies	Samuel	-	-	Davie	es@mail.	com			
	de Groot	Richard	Consultant (Jr.)	Software Developer	rdegr	oot@ma	il.com			
	Edwards	John	Software Engineer	Software Developer	j.edw	ards@m	ail.com			

Manage Resources at Setup

2. The screen contains two sections: one for 'no users' and one for 'users'. Click '**New**' in the 'no users' section to set up a resource which is not is associated with an user account in the Principal Toolbox.

Resources (no users)		Edit	New	Remove	* Resourc	es	•	View Options -
Last Name 🔶	First Name	Prima	ary Skill	Secon	dary Skill(s)	Email		
Bloemen	Pieter	Proje	ct Manag	er Consul	tant (Sr.)	Peter@mail.com		

Creating a new resource (no user)

3. A new window will appear. Enter the details of the new resource and click **Save**. The new resource will be listed in the section 'Resources (no users)'.

Appointing primary and secondary skills to resources

1. To appoint primary skills to resources (both users and non-users) click on **Edit**. Select the desired primary skill and click on **Save**. (Alternatively, to edit both primary and secondary skills of a resource, follow the steps below.)

Resources (users)					Save Cancel
Last Name 🌲	First Name	Primary Skill	Secondary Skill(s)	Email	Phone
Aalbersberg	Erik	Project Manager Consultant (Jr.) Consultant (Sr.) Project Manager IC Software Developer Software Engineer	Consultant (Jr.), Consultant (Sr.), Project Manager CT T	e.aalbersberg@forfes.nl	06 24 94 66 66
Administrator	Support			support@fortes.nl	

Appointing a primary skill

2. To appoint (a) secondary skill(s) to resources (both users and non-users), click on the name of the resource you want to appoint skills to (a new window will appear in which the resource details are listed)

Peter Cole			Save Cancel
First Name:	Peter	Primary Skill:	Software Developer
Last Name:	Cole	Secondary Skill(s):	
Initials:	Ρ.	Default Ho	Consultant (Jr.)
Email:	p.cole@fortes.nl	Remarks:	Consultant (Sr.) Project Manager ICT
Phone:			Software Developer Software Engineer
		ОК	Annuleren

Appointing a secondary skill

- 3. Click Edit to modify the resource details, including the primary and secondary skills.
- 4. Click **Save** to save the modifications, and click **Close** to return to the main window.

Creating a resource pool and appointing resources to a resource pool

A new **resource pool** can be created by the resource manager.

1. Navigate to the "Dashboard" tab of the Resource Allocation module.

Dashboard	Properties	Request & Allocation (Projects)	Availability (Resources)					
Resourc	Resource Pool: Resource Pool: IT							
Dashboard tab	ashhoard tah							

- 2. Click **New** to create a new resource pool. Specify the name and, optionally, a description for the resource pool and click **OK**.
- 3. To appoint resources to a resource pool, click on the name of the resource pool (in the tab "Dashboard") that you want to add resources to.

Note: a resource can be appointed to multiple resource pools.

4. Click on the tab "**Resource Availability**" and click on **Add / Remove Resources** (a popup window with the available resources and already appointed resources will appear).

Select Resources				
Resources:	0			Selected Resources
	Administrator S			Peter Cole
	Arjan van der Laan			John Edwards
	Henk Visser			Ivo Rings
	Herman Mulder			Erik Aalbersberg
	Jan Jansen			
	Jeroen van Barneveld		->	
	Pieter Bloemen	=		
	Richard de Groot		-	
	Ruud Peltzer			
	Samuel Davies			
	Swank, A.E.			
	Theo van Wirdum			
	Tom Maassen			
	Weerdenburg, R.C. v.	-		

Adding resources

- 5. Select (a) resource(s) on the right and click "<<" to appoint the selected resources to the resource pool.
- 6. Click **OK** to save your changes.

3.3.1.2 Non Project Activities

To allow for allocation of a resource to non-project activities (and thus diminishing the resource's available hours for project allocation), one or more predefined sets of non-project activities need to be assigned to a resource pool.

- 1. Navigate to the Resource Pool.
- 2. In the tab "Dashboard", click **Edit Properties** to edit the main properties of the resource pool. A popup window will appear in which the properties of the resource pool can be edited.

Edit name and des	cription
Name:	Resource Pool: IT
Description:	
Non-Project Activit	y Sets
Non-Project Activity	Sets: Non-Activités du projet ✓ Non-Project Activités Non-Project Activités

3. Select the right non-project activity set(s) to be assigned to the resource pool and click **OK** to return to the main window.

<u>Creating non-project activity sets</u> is part of the **'Configuration'**. For more information click on <u>System Administrator: Setup & Settings</u> 154

3.3.1.3 Managing resource availability

The resource availability can be managed by the resource manager.

- 1. To edit availability of resources in a resource pool, click on the name of the resource pool.
- 2. Click on the tab "**Resource Availability**". A grid with the allocated hours, remaining hours and available hours is shown.

inoura ropenes riequ	ssi a Allocation (Frojects)	Availability (Resources)													
esource Pool: Resou	irce Pool: IT														
lorizon: 3 Sta	art Date: 02-Aug-2010	Scale:	Weeks Uni	it:		Hours	(chan	ges are s	pread out	over	Mod	e:	A	utomatic	
Fill in the availability for reso	urces and their allocation to	o non-project activities (NPA's	5).												
Allocated > Available	Allocated < Available														
vailability & NPA Allocation	per Resource													Save	Cano
oggle: 👽 Allocation 👽 Rev	maining 📝 Available ++	🖴													
			35 3	0-08	:	6 06-09		37 13-09	38 2	0-09	39	27-09	40	04-10	41 11
Resources > NPA	🔶 Primary Skill 😝 S	Secondary Skill(s)	🔒 Allo	Rem	Avai /	Allo Rem	Avai	Allo Rem	Avai Allo	Rem	Avai All	o Rem	Avai Al	lo Rem A	vai Allo I
✓ Filter by NPA															
 Filter by NPA Erik Aalbersberg 	Project Manager IC C	Consultant (Jr.), Consultant (Sr	r.), Proj	40	40	40	40	40	40	40	40	40	40	40	40
Filter by NPA Erik Aalbersberg Ivo Rings	Project Manager IC C Software Develope	Consultant (Jr.), Consultant (Sr	r.), Proj	40 40	40 40	40 40	40 40	40 40	40 40	40 40	40	40	40	40	40
 Filter by NPA Frik Aalbersberg Ivo Rings John Edwards 	Project Manager IC C Software Develope Software Engineer S	Consultant (Jr.), Consultant (Sr Software Developer	r.), Proj	40 40	40 40	40 40	40 40	40 40	40 40	40 40	40	40	40	40	40
 Filter by NPA Firk Aalbersberg Firk Aalbersberg Fire No Rings Fire John Edwards Fire Peter Cole 	Project Manager IC C Software Develope Software Engineer S Software Develope	Consultant (Jr.), Consultant (Sr Software Developer	r.), Proj	40 40	40 40	40 40	40 40	40 40	40 40	40 40	40	40	40	40	40
	Project Manager IC C Software Develope Software Engineer S Software Develope	Consultant (Jr.), Consultant (Sr Software Developer	r.), Proj	40 40	40 40 80	40 40 80	40 40 80	40 40	40 40 80	40 40 80	40	40	40	40	40

Adding the resource availability

Note: The columns with allocated, remaining and available hours can be toggled on and off by checking or unchecking the checkboxes directly underneath the header of the resource availability section.

Note: If needed, the timeline setting of the availability grid can be edited. To do so, click on **Edit Timeline Settings**. Set the horizon and start date according to your preferences. It is also possible to set the scale and unit.

 Click Edit in the title bar of the Resource Availability Section. In the table in the Resource Availability section, the available hours can be entered for each resource in the columns " Available" per period. Only specify the hours that each resource is available to be allocated to projects

Dashboa	rd Properties	Request & A	Ilocation (Proje	cts) Availa	bility (Resources)																			
Resou	urce Pool: R	esource	Pool: IT																					
Horizor	n: 3	Start Date	e: 02-Aug-2	2010	Scale:	Weeks	Uni	t:		H	lours	(char	nges a	re spi	read o	ut over	N	lode:		4	Autom	atic	-	
Fill in	the availability f	or resources a	and their allocat	tion to non-pr	roject activities (NF	PA's).																		
Allo	ocated > Available	Allocate	ed < Available																					
Availab	oility & NPA Allo	cation per R	lesource																		S	Save	Ca	nce
Toggle:	Illocation	Remaining	V Available	+, - 🚔																				
							35 3	0-08		36 06	6-09		37 13	-09	38	20-09		39 27	-09	40	04-1	0	41 1	1-1
Re	esources > NPA	\$	Primary Skill	😝 Seconda	ry Skill(s)	÷	Allo	Rem	Avai	Allo	Rem	Avai	Allo	Rem /	Avai Al	lo Ren	r Avai	Allo	Rem	Avai A	llo Re	err Av	ai Allo	R
~	Filter by NPA																							
ו 🛉	- Erik Aalbersb	erg	Project Manage	er IC Consulta	ant (Jr.), Consultan	t (Sr.), Pro		40	40	8	32	40		40	40	40	40		40	40	4	0 40)	4
84	[Project A	llocation]																						
X •	i 🖂 Educat	on								8			8											
ו 🗄	- Ivo Rings		Software Devel	оре				40	40		40	40		40	40	40	40							
	lohn Edward	8	Software Engin	eer Software	Developer																			
**	J. John Luwaru																							
ו + ו +	- Peter Cole		Software Devel	ope																				
×+ ± ×+ ±	- Peter Cole		Software Devel	оре				80	80	8	72	80		80	80	80	80		40	40	4	0 40)	4

Adding non-project activities

- 4. To allocate a resource to non-project activities:
 - a. Add a new row for the resource that needs to be assigned to non-project activities by clicking on the '+' sign in front of the resource's name. A new row appears with a blank activity field.
 - b. Click on the blank activity field and select the right non-project activity.
 - c. The hours to be allocated to the selected non-project activity can be entered in the columns "Allocated" per period.
 - d. Repeat steps 5a through 5c for each additional non-project activity.

5. Click Save to save your changes.

3.3.1.4 Managing requests and allocations

The owner of a resource pool (a resource manager) is responsible for evaluating all resource requests that are coming in, and turning them into allocations.

- 1. From within the Resource Allocation module, open the resource pool that needs managing.
- Open the 'Request & Allocation (Projects)' tab from the dashboard. It will display a planning board with requested and/or planned, allocated and remaining hours for each resource.

Note: depending on the chosen resource allocation process, the button 'Edit Timeline Settings' allows for changing whether planned and/or requested hours are being displayed. To make the change, set the '**Resource Allocation Process**' to one of '**Project request driven**', '**Project demand driven**', or '**Hybrid**'.

The individual cells in the planning board are colour coded to give an immediate impression:

- **Blue:** shows all requests for resources which haven't been (completely) satisfied by resource allocations

- Green: depict remaining hours available to be allocated against projects and non-project activities

- $\ensuremath{\text{Red:}}$ alarm the resource manager to the fact that resources have been allocated over and above their availability

		/ are dation (i rejecte)			(Resou	irces)																	
cesour	ce Pool: Resource	Pool: IT															Add / F	temov	e Res	source	s Edi	t Timelin	e Setting:
Horizon:	3 Months Start Da	te: 02-Aug-2010		:	Scale:		We	eeks (Unit:		ł	Hours	s (chang	es are	e spre	ead out ov	er perio	d) Mo	ode:		Autor	natic Reca	alculation
Fill in th	e project allocation for res	ources based on the p	project p	lan a	ind/or r	equest	t.																
Alloca	ated > Available Alloca	ited < Available	equest o	or Pla	nned >	Allocat	ed	Pla	nned >	Requ	est												
Calaurian		and of the surded size of						a a diti a	_														
Colouring	on project row indicates that	one of the underlying re	esource/s	SKIII FO	ows nas	a mato	ching c	onaltic	on.														
Request	& Allocation per Project																						Edit
Toggle:	Planned Request	Allocation 📝 Rem	aining	A	vailable	+++ +																	
			31 02-0	8		32 09-	08		33 16-	08		34	4 23-08			35 30-08		36 ()6-09		37 1	3-09	38
🔶 🔶 Pi	rojects > Resources	🔶 Skill \ominus	Plan R	ea Al	llo Rem	Plan R	lea Al	lo Ren				_			D								
									r Plan I	leq A	llo R	err P	lan Req	Allo	кеп	Plan Req	Allo R	err Pla	n Req	Allo F	Rem Plai	Red All	Rem Pla
	Filter by resource	 Filter by skill 							r Plan I	Red A	llo R	err P	'lan Req	Allo	кеп	Plan Req	Allo R	en Pla	n Req	Allo F	terr Plan	Req Allo	o Rem Pla
	Filter by resource [Resources Summary]	✓ Filter by skill	8	32 6	64 88		82 6	4 88	r Plan F	86 86	64 8	err P	lan Req 64	64 AIIO	88	Plan Req 138	Allo R	err Pla	n Req	I Allo F	terr Plan	148	D Rem Pla
· •••••	 Filter by resource [Resources Summary] Apollo Project 	✓ Filter by skill	8	32 6 57 3	64 88 39		82 6 57 3	4 88	r Plan F	86 61	64 8 39	en P	'lan Req 64 39	64 39	88	Plan Req 138 92	Allo R	en Pla	n Req 158 112	Allo F	Serr Plar	148	0 Ren Pla
••••	 Filter by resource [Resources Summary] Apollo Project Erik Aalbersberg 	✓ Filter by skill Project Manager IC	8 6 7	32 6 57 3 20 1	64 88 89 10 20		82 6 57 3 20 1	4 88 9 0 20	r Plan F	86 61 20	64 8 39 10	en P 38	'lan Req 64 39 10	64 39 10	88 20	Plan Req 138 92 16	Allo Ri	err Pla	n Req 158 112 16	Allo F	52 40	148 102 16	0 Rem Pla 152 40
	 Filter by resource [Resources Summary] Apollo Project Erik Aalbersberg Ivo Rings 	 Filter by skill Project Manager IC Software Develope 	8 8 9 1	82 6 57 3 20 1 23 1	64 88 99 10 20 15 20		82 6 57 3 20 1 23 1	4 88 9 0 20 5 20	r Plan F	86 61 20 27	64 4 39 10 1 15 1	en P 38 20 20	1an Req 64 39 10 15	64 39 10 15	88 20 20	Plan Req 138 92 16 22	Allo Ri 15	em Pla 52 -0 -0	158 112 16 22	Allo F	52 40 40	148 102 16 22	40 40
	 Filter by resource [Resources Summary] Apollo Project Erik Aalbersberg Ivo Rings John Edwards 	✓ Filter by skill Project Manager IC Software Develope Software Engineer	8 8 1 2 1	32 6 57 3 20 1 23 1 10 1	64 88 39 10 20 15 20 10 22		82 6 57 3 20 1 23 1 10 1	4 88 9 0 20 5 20 0 22	r Plan I	86 61 20 27 10	64 8 39 10 2 15 2 10 2	en P 88 20 20 22	1an Req 64 39 10 15 10	64 39 10 15 10	88 20 20 22	Plan Req 138 92 16 22 32	Allo Ri 15 4 3	em Pla 2 0 0 2	158 112 16 22 52	Allo F	40 32	148 102 16 22 52	 Rem Pla 152 40 40 32
	Filter by resource [Resources Summary] Apollo Project Erik Aalbersberg Vo Rings John Edwards Peter Cole	 Filter by skill Project Manager IC Software Develope Software Engineer Software Develope 	2 1 1 1	32 6 57 3 20 1 23 1 10 1 4	64 88 39 10 20 15 20 10 22 4 26		82 6 57 3 20 1 23 1 10 1 4	4 88 9 0 20 5 20 0 22 4 26	r Plan I	86 61 20 27 10 4	64 8 39 10 1 15 1 10 1 4 1	en P 88 20 20 22 26	lan Req 64 39 10 15 10 4	64 39 10 15 10 4	88 20 20 22 26	Plan Req 138 92 16 22 32 22	Allo R(15 4 3	em Pla 52 00 00 52 00	158 112 16 22 52 22	Allo F 1	40 40 32 40	148 102 16 22 52 12	40 40 32 40
	Filter by resource Filter by resource Filter by resources Summary] Filter by Resources Summary] Filter Cole Filter	 Filter by skill Project Manager IC Software Develope Software Engineer Software Develope 	8 8 1 1 1 1	32 6 57 3 20 1 23 1 10 1 4 25 2	64 88 69 10 20 15 20 10 22 4 26 25		82 6 57 3 20 1 23 1 10 1 4 25 2	4 88 9 20 5 20 0 22 4 26 5	r Plan I	86 61 20 27 10 4 25	110 R 64 1 39 10 1 15 1 10 1 4 1 25	en P 88 20 20 22 26	lan Req 64 39 10 15 10 4 25	64 39 10 15 10 4 25	88 20 20 22 26	Plan Req 138 92 16 22 32 22 46	Allo R(15 4 2 4 3 4 4 4 4 4 4	em Pla 2 0 0 2 0 2 0	158 112 16 22 52 22 46	Allo F	52 40 40 32 40	148 102 16 22 52 12 46	152 40 40 32 40
	Filter by resource Filter by resource Filter by resources Summary Filter by resources Summary Filter by Resources Summary Filter by Resources Filt	Filter by skill Project Manager IC Software Develope Software Engineer Software Develope	8 8 1 1 1 1 1 2 8	32 6 57 3 20 1 23 1 10 1 4 25 2 32 6	64 88 39 10 20 15 20 10 22 4 26 25 64		82 6 57 3 20 1 23 1 10 1 4 25 2 82 6	4 88 9 20 5 20 0 22 4 26 5	r Plan I	86 61 20 27 10 4 25 86	64 8 39 10 2 15 2 10 2 4 2 25 64	en P 88 20 20 22 26	Plan Req 64 39 10 15 10 4 25 64	64 39 10 15 10 4 25 64	88 20 20 22 26	Plan Req 138 92 16 22 32 22 46 138	Allo R(15 4 3 4	em Pla 2 0 0 2 2 0 0	n Req 158 112 16 22 52 22 22 46 158	Allo F	52 40 40 32 40	148 102 16 22 52 12 46 148	40 40 32 40

The planning board is used to manage the requests for resources

Note: the columns with requested, allocated, remaining and available hours can each be hidden by toggling the checkboxes

Note: using the button 'Edit timeline settings', the period covered by the planning board, and its resolution can be changed

3. Press the 'Edit' button in the 'Request and Allocation per Project' section of the screen to edit the allocation of resources.

Use the **'+'**-sign to check the details per individual resource on a project. By expanding the **'Resources Summary'** it'll show the total allocation per resource independent of the projects.
4. To change the allocation of a resource, fill out the values in the **Allocation** column. This can be done for each separate period. The period is determined by the timeline settings.

Note: when a skill has been requested, instead of a specific named resource, the resource manager will have to select a named resource with the specified skill before allocating hours.

5. Press **'Save'** to keep all changes. The allocations are published to the projects and are now available to the project managers.

Note: with the '<', '>' and '>>'is is possible to move all editable values one week to the left (<), one week to the right (>) or four weeks to the right (>>).

	Allo	cated	1 > /	Avail	able	Allo	cated «	< Av	ailable		Re	ques	st oi	r Plan	ned >	Alloc	ated		Plar	ned	Req	uest								
Colo	Colouring on project row indicates that one of the underlying resource/skill rows has a matching condition.																													
Req	ues	t & /	Allo	cati	on (per Projec	t																							
V	Plar	ned	V	Re	que	st 🔽 Allo	cation	V	Remai	ining		Ava	ilab	le +																
															31 0	2-08			32 0	9-08			33 16	-08			34 23	-08		
	\$	\$			P	rojects > F	Resour	ces		⇒	Skill			<	Pla	n Rec	Allo	Rem	Plar	Req	Allo	Rem	Plan	Req	Allo	Rem	Plan I	Req	Allo	Rem
					4	 Filter by r 	esourc	е			⇒ Fi	lter b	oy s	kill																
84					6	H- [Resou	irces S	Sum	mary]							82	25	127		82	25	127		86	64	88		64	64	88
×+	-		4	••	Þ	- Apollo	Proje	ct								57				57				61	39			39	39	
84				Qu	ick	Move Proi	ect Va	lues			D:-	-4.8.4			-	- 20	-	20		- 00		30		20	10	20		10	10	20
84				Mo	ves	all editable	values	s of	the proj	ject f	our w	eeks	s to	the ri	ght.							35		27	15	20		15	15	20
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% 4																82	25			82	25			86	64			64	64	
															•															

Move editable values

Discussions between project manager and resource manager

Using the Principal Toolbox it's possible to discuss requests and allocations between project manager and resource manager. The discussion is initiated by the resource manager and works like a chat service. It's used as follows:

- 1. From the resource allocation module, open a resource pool and navigate to the 'Request & Allocation' tab.
- 2. Press the Edit button of the planning board.
- 3. Press the Pencil icon next to the project for which a discussion is to be started

ו 👝	Peter Cole	Software Developer
X 🕈 📔 🖌 🕇 🕨 🗰	. Venus Project	
×+ 🖵	Erik Aalbersberg	Project Manager IC
84	···· Ivo Rings	Software Developer
84	Peter Cole	Software Developer

Opening a discussion log

4. A chat session is opened in which the resource manager can enter a message for the project manager.

completed or flag the reques	t for follow-up.		
iscussion Status:	✓ New	Request Status:	Yellow 🔻
scussion Loa			New
			Red
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			*

Discussion log

- 5. After pressing 'OK' a message will be sent to the project manager.
- 6. The project manager receives the message in the **Resource Allocation** tab on the project. A response can be given by clicking **'Edit'** and sending it by using the Envelope button.

Dashboard P		
Project: W	Discussie tussen Venus Project en Resource Pool: IT	¢
FTOJECI. V	Here you can read and contribute to the discussion between the project manager and pool manager by adding a message.	
Horizon:	Discussion Status:	
	Discussion Log	
Request o		
Request & Al		ve Cancel
Toggle: 📝 F		
		-09 39 27
•	Frik Aalhersherr (11 Jan 2013 14:50)	Reg Allo Plan
×+ 🖂 🕨	Ok	46
26.4	Erik Aalbersberg (11-Nov-2011 14:29): James is not available next week	16
84		10
26.0		20
26.52		40
	OK Annuleren	

Discussion log on projects

3.3.2 Managing resources on projects

Using the Principal Toolbox resources can be requested to work on projects. Requests can be submitted for the project as a whole or by individual product. When done by individual product it's called a 'demand' rather than a 'request'. Depending on the organization's requirements one of these planning processes can be chosen, or a hybrid model can be used.

3.3.2.1 Requesting resources

Before a project manager is able to request resources from a resource pool, a pool or multiple pools have to be linked to the project.

1. Go to the project and click on **Edit Properties**. A pop-up will appear where you can link a resource pool to a project.

Edit Project				
Properties				
Name:	Venus Project			
Objective:	Realisation of the Venus			
Status:	Green			
Status Description:				
Project Color:				
References				
Resource Pool(s):	٩		Selected Resource Pool(s)	
	Resource Pool: Database		Resource Pool: IT	
		→		
		(-		

Add a resource pool to the project

- 2. By using the "<<" the project manager is able to add more resource pools.
- 3. Click Ok to save your changes

The project manager is now able to request resources from the resource pool.

1. In a project, navigate to the "Resource Management" tab, section "Resource Allocation". In the "Request & Allocation" section, a grid is shown with planned, requested, and allocated hours. Blue cells indicate resource requests that are not yet (fully) fulfilled with allocated resources by the resource allocation manager.

Note: The columns with planned, requested, and allocated hours can be toggled on and off by checking or unchecking the checkboxes directly underneath the header of the Request & Allocation section.

Note: If needed, the timeline setting of the grid can be edited. To do so, click on **Edit Timeline Settings**. Set the horizon and start date according to your preferences. It is also possible to set the scale and unit.

- 2. To assign one or more resource pools to the project (only needs to be done once for every project, or whenever changes are required), click **Edit Resource Pools** in the Request & Allocation header. A popup window will appear in which one or more available resources pools can be assigned to the project.
- 3. In the header of the "Request & Allocation" section, click **Edit** to start requesting resources for the project.

Dashboard Properties 🕶 F	Product Breakdown	Plan	Gantt	Res	source	e Man	nagei	ment	- D	ocuments	•	Portfolio	Repo	ort Reports	Guid	e Plaza				
Project: Apollo Proje	ct														Ec	lit Resou	rce Pools	Edit T	imeline S	etting
Horizon: 3 Months	Start Date: 02-Au	ıg-201	0		Scal	e:		We	eks (Jnit:		Hours (chang	es are spread o	ut ove	r period)				
Request or Planned > Allo	cated Planned >	Requ	est																	
Request & Allocation																				Edit
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Pools > Resources	🔶 Skill	- ⊖ I	Plan Re	q Allo	Plan I	Req A	Allo	Plan R	eq All	o Plan Req	Allo	Plan Re	q Allo	Plan Reg All	o Plar	Req Allo	Plan Req	Allo Pla	n Req All	o Plan
Filter by	Filter by																			
🔀 🗄 Resource Pool: IT			51	39		57	39	6	51 3	39	39	9	2	112		102	102		20	
Erik Aalbersberg	Project Manage	er IC	20	10		20	10	2	20 11	10	10	1	6	16		16	16			
Ivo Rings	Software Deve	loper	23	3 15		23	15	2	27 1	5 15	15	2	2	22		22	22			
John Edwards	Software Engin	neer	10	10		10	10	1	10 11) 10	10	3	2	52		52	52		20	
	Software Deve	loper	4	4 4		4	4		4	1 4	4	2	2	22		12	12			
Peter Cole													-							
Peter Cole			51	7 39		57	39	(61 3	9 39	39	9	2	112		102	102		20	

Requesting resources on a project

- 4. To add a row in which a resource or skill request can be entered, click on the '+'-sign in front of the appropriate resource pool. To request a resource, perform one of the following steps:
 - a. To request a specific 'named' resource, select a resource name from the drop down menu in the resource name field underneath the appropriate resource pool. Optionally, select the skill that the resource is requested for in the drop down menu in the skill field next to the resource name field.
 - b. To request a skill instead of a specific resource, select a skill name from the drop down menu in the skill field underneath the appropriate resource pool. The resource manager will allocate a resource with the desired skill to match the request.
- 5. Click **Save** to save your changes. This will automatically send new or changed requests to the Resource Allocation Manager.

3.3.2.2 Planning resources

Instead of, or complimentary to requesting resources at project level, resources can be **'planned'** at product level. To do so, follow these steps:

- 1. Open one of the products on the project and navigate to the tab 'Resource Demand'.
- 2. Within the section 'Resource Demand' press the Edit button.
- 3. Using the planning board, resources can be planned by Skill, named Resource, or both.
- 4. Additionally the hourly rate can be chosen as it may be specific to the project.

Note: as soon as a resource registers hours against a project, using the time entry module, the default hourly rate as defined for the resource will be used. If this default rate is different from the rate as chosen when demanding resources, the project manager will have to explicitly change the rate that is used when the resource enters time against the project. Please see <u>'Letting project</u> managers choose hourly rate' 12² for instructions on how to set the appropriate rate.

Genera	al Logs	Dependencies	Costs & Hours	Resource Deman	d					
Prod	uct: Pi	roject Initiati	e Documen	t (PID)						
Edit	the reso	urce demand plar	ining.							
Name	9:	Pr	oject Initiatie Doc	ument (PID)	Planned d	ate	Act	ual date		
Desc	ription:			V	Start:	11-Jan-20	13 2	6-Sep-2006		
Hour	s Planne	d:	0.00		Final:	17-Jan-20	13			
Cost	s Planne	d:	0.00	Dur	ation In W	/orking D	ays:	5.00		
Hour	s Actual:	:	636.00							
Reso	urce Den	nand							Save	Cancel
+_+ ·	- 🚔									
	Skill		😝 Resource	Ð	Default H	lour R 😝	Planned	Costs Plann	ed	
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\approx \sim		Project Manager	ICT 😔 Erik Aalb	ersberg	✓ Rate 1	10.0	40	4	400	
*	i	 Software Develo 	per 🖂 Peter Co	le	✓ Rate 5	6.0	10		560	
$\times \bullet$							50	4	1960	

Resource planning on product level

An overview of all planned resources on the project is found on the '**Resource Allocation**' tab, under the header '**Resource Management'**. To only view planned resources (and not the requests) the timeline settings have to be changed. Press the '**Edit Timeline Settings'** button to set the Resource

Allocation Process to 'Project Demand Driven'.

Any hours planned against the product will be evenly distributed across the duration of the product, which is defined by its start and end dates.

3.4 Time registration (add-on)

Registration of hours using the Principal Toolbox is done by using the module 'Time Entry'. Users of the Principal Toolbox who are assigned to so-called Time Registration groups will receive a timesheet which they can then use to register the hours worked against projects and non-project activities, like leave. Using these timesheets, actual cost entries can be allocated against projects and non-project activities activities according to pre-defined hourly rates.

3.4.1 Generating, submitting and approving timesheets

The process contains the following steps, which are explained in the next sections.

1. Creating a time entry configuration [113]

With this step, you define which products are shown on users' time sheets, and whether or not they have a free choice of products on their time sheet. Different configurations can be used for different departments.

2. Creating non-project activity sets 155

These sets can be used to define activities that are not part of projects. These could be operational duties, and non-productive hours, like sick leave, holidays, leave. For different departments, different sets can be created.

3. Creating time entry groups [118]

These groups define departments / teams. Members of a group share configuration, non-project activity sets and the approvers of the weekly time sheets.

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Automated Panorte	A time entry	group can be related to a sin	le configuration and	one or more nor	n-project act	ivity sets (NPA set	s).						
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Menaing limesneets	Time Fat				(Marcol Co	10	* AH T	o Colo 1	-	16				
Approved Timesheets	Time Entry G	roups			New F	emove	· All Tin	ie Entry (sroups	view Op	nons 👻			
	Name 🐣	Description		Group Man	ager	Time Entry	Configu	ration	Non-Projec	t Activity Sets				
P	ICI Salas	Groep voor	ICT medewerkers	Enk Aalber	sberg	Budget			Non-Project	t Activities				
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Timeline Deports	Budget	Time sheet 18-Feb	-2013 - 24-Feb-	2013 (Erik /	Albersb	erg)					Sa	ve Sav	e and Request Approval	Cance
Entries														
	Membership	Owner:	Enk Aalbersberg				1	ime Ent	ry Group:	ICT				
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		Last Saved By:						Remarks	by Approv	er /				
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Add-on 'Timesheets'

See also <u>Registration of actual hours</u> for more information about using timesheets.

3.4.1.1 Creating a time entry configuration

The time entry configuration defines:

- which products are shown on time sheets:
 - o "membership" based: only products of which the user is owner, reviewer or participant are shown

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on the time sheet, regardless of budget.

- budget based: only products that have a budget assigned are shown, but then to all members of a project.
- · whether only products from active stages are shown, or all products from the project
- whether users are allowed to choose products of projects they are not a member of.

Creating a time entry configuration

There are multiple ways to create time entry configuration. The default way to define a time entry configuration is described below.

1. In the dark blue page header, click on Time Entry.

rojectmanagement Resourc	e Allocation Time Entry Prince2 FAQ Pro	ject Plaza Import / Exp	ort Eril	k Aalbersberg 👻 Help Support Setu
			Edit	Members Customise Page Text
A time registral A time entry gr NBA coto con l	ion group contains a group of persons for time oup can be related to a single configuration and a modified and created in 'Setup Scenfiguration	entry. I one or more non-proje w'	ct activity sets (NPA sets	5).
NFA Sets call	e mounieu anu createu in Setup->Comiguratio			
Time Entry Grou	ips	New	Remove * All Tim	e Entry Groups
Name 🜲	Description	Group Manager	Time Entry Configur	ation Non-Project Activity Sets
ICT	Groep voor ICT medewerkers	Erik Aalbersberg	Budget	Non-Project Activities
Sales	Groep voor Sales medewerkers	Albert Swank	Membership	Non-Project Activities
•		m		
Time Entry Con	figurations	New	Remove * All Tim	e Entry Configurati 👻 View Options
Name 🔶	Description			
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Time Entry Page

2. On the **Dashboard** tab that appears, click **New** in the header **Time entry configurations** to create a new time sheet configuration.

Dashboard Accountable Hours			
Time Entry Configuration: Budget		Save	Cancel
Edit time entry configuration Set name and settings for this configuration.			
General			
Name:	Budget		
Description:	Products appear on time sheets when an hours budget has been set on those products		
Split Up Time Sheets on Month Transition:			
Create new Time Sheets after Approval Request:			
Allow external users as time entry group members:			
Products shown automatically on time sheets			
Product Membership:			
Product Budget: Products from active stage only Products from all stages			
Free product selection			
Allow free entry on projects:			
Allow free entry on non project activities:			
Show fields on time sheet			
Product Field (read-only):	\checkmark		
Entry Field (selectable in time sheet):	▼ □ Required to be set		
Approval			
Auto Approve on Submit:			
Create draft entries on request approval:			
	Replace draft entries after approval. Keep history of draft entries after approval.		

Time Entry Configuration

3. Fill in the following information:

Name	:	Name of the time entry configuration.
Description	:	Description of the time entry configuration.
Product membership	:	Select which products will be automatically available for time entry.
Product budget	:	Select which products will be automatically available for time entry.
Allow free entry	:	Select if users may select products free.

- 4. Click **Save** to store the time registration configuration.
- 5. Now you can close this dialog, by clicking **Close**.

Time entry configuration with Planning Item Filters

Another way to create a time entry configuration is by using so-called 'Planning Item Filters'. These configuration options are bit more flexible and offer more filter options.

- 1. To enable the 'Planning Item Filters' navigate to **Setup, Configuration** and click on **Time Entry** and **Settings**.
- 2. Click on Edit to enable the 'Support for Activity Planning'.

Configuration				
Options ++	Settings			
 Principal Toolbox Notifications MS Project integration 	Module name: Time Entry Settings for Time Entry			
Manage Hour Rates Project Plaza	Settings			
Currencies		Default value	Custom value	
Resource Categories	Allow project manager(s) to approve	O No	Yes	
Financial Categories	hours 🕕			
Manage Resources	Allow project manager(s) to configure	O No	Yes	
Manage Skills	Support for Activity Planning	No		
 Time Entry 	Support for Activity Planning	0100	Ves 💌	
Settings				
Exclusions for Priv-approval				
Manage time sheets	OK Cancel			
 Manage entries 				
Manage Non-project Activity Sets				
Resource Allocation				
Customize fields				
Approval entries				

Enable Support for Activity Planning

- 3. Go back to Time Entry in the dark blue bar.
- 4. Click on **New** in the header **Time Entry Configurations** to create a new time entry configuration.

	anning item Filters	
Time Entry Configuration:	Budget	Edit Clo
Edit time entry configuration		
Set name and settings for this cor	nfiguration. A planning iter	m can be a product, an activity or a non project activity.
General		
Name:		Budget
Description:		Products appear on time sheets when an hours budget has been set on those products
Split Up Time Sheets on Month Trai	nsition:	
Create new Time Sheets after Appro	oval Request:	
Allow external users as time entry g	group members:	
Pre-selected Planning Items		
Pre-selected planning items are s without having to select them. Filt	hown on the time sheet b ers can be selected to co	by default. For these items, employees can directly start writing their hours, infigure which Planning Items should be shown as pre-selected.
Pre-selected Planning Item Filters:	Selected Filter(s)	Available Filter(s)
	No name	Image: Pre-selected With budget With budget and in progress With ownership With ownership and in progress
Selectable Planning Items Selectable planning items appear	in the product/activity sel	lection. Employees are allowed to write their hours on these items. Filters car
be selected to configure which pla	anning items should be se	electable.
be selected to configure which pla Selectable Planning Items:	Selected Filter(s)	Available Filter(s)
be selected to configure which pla	selected Filter(s)	Available Filter(s) Pre-selected With budget With budget and in progress With ownership With ownership and in progress
be selected to configure which pla Selectable Planning Items: Show fields on time sheet	Selected Filter(s)	Available Filter(s) Pre-selected With budget With budget and in progress With ownership With ownership and in progress
be selected to configure which pla Selectable Planning Items: Show fields on time sheet Product Field (read-only):	Anning items should be se	Available Filter(s) Pre-selected With budget With budget and in progress With ownership With ownership and in progress
be selected to configure which pla Selectable Planning Items: Show fields on time sheet Product Field (read-only): Entry Field (selectable in time sheet	Percentage Comp	Available Filter(s) Pre-selected With budget With budget With budget With ownership With ownership and in progress With ownership and in progress
be selected to configure which pla Selectable Planning Items: Show fields on time sheet Product Field (read-only): Entry Field (selectable in time sheet Approval	Percentage Comp	Available Filter(s) Pre-selected With budget With budget With ownership With ownership and in progress With ownership and in progress
be selected to configure which pla Selectable Planning Items: Show fields on time sheet Product Field (read-only): Entry Field (selectable in time sheet Approval Auto Approve on Submit:	Percentage Comp	Available Fitter(s) Pre-selected With budget and in progress With ownership With ownership and in progress Notete Required to be set
be selected to configure which pla Selectable Planning Items: Show fields on time sheet Product Field (read-only): Entry Field (selectable in time sheet Approval Auto Approve on Submit: Create draft entries on request app	Percentage Comp t):	Available Filter(s) Pre-selected With budget With budget and in progress With ownership With ownership and in progress With ownership and in progress Required to be set

Time Entry Configuration with planning item filters

5. Fill in the following information:

Name : Description : Pre-selected Planning Item Filters:	 Name of the time entry configuration. Description of the time entry configuration. Select which products will be automatically available for time entry. Every option contains filters that will determine which products will be displayed on the timesheet. The following options are available: Show all products by default. Only show the products with a budget (With budget). Only show the products with a budget and in progress (With budget and in progress). Only show the products with an owner assigned (With ownership). Only show the products with an owner assigned and in progress (With ownership and in progress) Show all products/activities with the field 'Pre-selected on Timesheets' selected on the product page. By selecting this field on all products it is possible to determine per product wether it should appear on the timesheet.
Selectable Planning Items :	Select which products can be selected on the timesheet by the users. The same options are available as described above.
Show fields on time sheet :	 Product field (read-only): select which information about the product will be displayed on the timesheet (i.e. the number of risks, the number of issues, etc.) Entry Field (selectable in time sheet): select on which entry field data can be entered in the timesheet
Approval :	 Select the option 'Auto Approve on Submit' if the Department Manager doesn't need to approve the hours. For more information about the approval process please take a look at: <u>Configuring the approval process</u> [119]. Create draft entries on request approval: use this option if a draft entry needs to be created when requesting approval.

- 6. Click **Save** to store the time registration configuration.
- 7. Now you can close this dialog, by clicking **Close**.

Creating Planning Item Filters

It is also possible to create your own 'Planning Item Filter'. By creating you own filters you can determine which type of products should be pre-selected of selectable.

- 1. Click in the Time Entry Configuration on the tab Planning Item Filters
- 2. To create your own 'Planning Item Filter' click on View Options and select Set Filter.

close splayed on the timesheet. en the filter is selected on the configuration (dashboard tab) members are allowed to write hours on
splayed on the timesheet. en the filter is selected on the configuration (dashboard tab) members are allowed to write hours on
* With ownership
All Members Start Draft Child Set Filter
John Edwards, Albert 16-Jun-2012 19-Jun-2012 21-Jun-201 Set Columns Swank, Erik Aalbersberg Advanced Make Default Save View
i

Creating a Planning Item Filter

- 3. A list with available filters will appear. Configure the filter and click on OK.
- 4. To save the view click on View Options and Save View.
- 5. Enter the name of the view, select the type and click on **OK**.
- 6. The 'Planning Item Filter' is now available in the time entry configuration.

3.4.1.2 Creating time entry groups

Now you can attach your created 'time entry configuration' and 'non-project activity sets' to a new 'time entry group'. This time entry group will be the entire population of time-writing users, or a department or team with different settings.

An important property of the time entry group is the approver selection. Per group, you define who is responsible for approving the time sheets of the members.

To define time entry groups:

- 1. In the dark blue bar in the top, click 'Time Entry'.
- 2. On the 'Dashboard' tab, click **'New'** in the section 'Time entry groups' to create a new time sheet configuration.

ime Entry								
Time Entry						Edit Memb	ers Customis	se Page Text
Automated Reports	Edit	A time registration group co A time entry group can be re NPA sets can be modified a	ntains a group of persons for time e elated to a single configuration and of nd created in 'Setup->Configuration	ntry. one or more non-pr '.	oject activity	sets (NPA sets).		
Pending Timesheets								
Approved Timesheets		Time Entry Groups		1	New Rem	ove * All Time Entr	y Groups 🛛 🔻	View Options
		Name 🜲	Description	Group Manage	er Tim	e Entry Configuration	Non-Project	Activity Sets
		ICT	Groep voor ICT medewerkers	Erik Aalbersber	rg Bud	iget	Non-Project	Activities
Reports		Sales	Groep voor Sales medewerkers	Albert Swank	Mei	mbership	Non-Project	Activities
Time Entry Groups Non-Project Activity Sets		•		ш				
Time Sheets Cost / Hour Entries		Time Entry Configurations		1	New Rem	ove * All Time Entr	y Configurati 👻	View Options
		Name 🚓	Description					
Timeline Reports		Budget	Products appear on time shee an hours budget has been set products	ts when on those				
Entries		Membership	Products appear on time shee users are owner/reviewer/part those products. Active stage o choice of products also allowe	ts when icipant of nly. Free d.				

Time Entry

3. Then fill in the following information:

Name	:	Name of the time entry group.
Description	:	Description of the time entry group.
Group manager	:	Select the group manager who can edit the settings of the time entry group.
Selected time sheet configuration	:	Select which time sheet configuration is active for this entry group.
Selected set(s) of non-project activities	:	Select if users may book hours on created non-project activities.

4. Click **OK** to store the time entry group configuration.

Available users Q Albert Swank A/jan van der Laan Enk Aalbersberg Henk Visser Herman Mulder Ivo Rings Jan Jansen Jeroen van Barneveld John Edwards Peter Cole Richard de Groot Rudd Pettzer Rudd Veerton Samuel Davies Support Administrator
Available users Q Albert Swank Arjan van der Laan Erik Aalbersberg Henran Mulder Ivo Rings Jan Jansen Jeroen van Barneveld John Edwards Peter Cole Richard de Groot Rudd Vettzer Rudd Vettzer Samuel Davies Support Administrator
Available users Q Albert Swank Anjan van der Laan Erik Aalbersberg Henk Visser Herman Mulder Ivo Rings Jan Jansen Jaroen van Barneveld John Edwards Peter Cole Richard de Groot Rudd Petzer Rudd Veerdenburg Samuel Davies Support Administrator
Available users Q Abert Swank Angan van der Laan Erik Aalbersberg Henk Visser Herman Mulder Ivo Rings Jan Jansen Jeroen van Barneveld John Edwards Peter Cole Richard de Groot Ruud Petzer Ruud v. Weerdenburg Samuel Davies Support Administrator
Albert Swank Anjan van der Laan Enk Aalbersberg Henk Visser Herman Mulder Ivo Rings Jan Jansen Jeroen van Barneveld John Edwards Peter Cole Richard de Groot Ruud Veetzer Ruud v. Weerdenburg Samuel Davies Support Administrator
Jan Janse Jansen van Barneveld John Edwards Peter Cole Ruchard de Groot Ruud Pettzer Ruud v. Weerdenburg Samuel Davies Support Administrator
Support Administrator
Theo van Wirdum Tom Maassen Yung Ji-Lao

Time Entry Group Configuration

- 5. When the time entry group is stored, it will appear in the listing of 'Time entry groups'. Now click the created entry to config the time entry group.
- 6. Go to the 'Members & Approvers' tab to add members of this time entry group.
- 7. Click the 'Add / Remove' button to add or remove group members and approvers.

Add / Remove

Time Sheets Members 8	& Approvers Hour Entries			
Time Entry Group	: ICT			
Name:	ICT		Time Entry Configuration: Membership	
Description:	Groep voor ICT medewerke	ers	Non-Project Activity Sets: Non-Project Activities	
Group Approvers				Add / Remove
Name	Email	Remarks		
Ruud v. Weerdenburg	r.vanweerdenburg@fortes.nl			
Group Members				Add / Remove
Name	Email	Remarks		
Arjan van der Laan	Laan@mail.com			
Erik Aalbersberg	e.aalbersberg@fortes.nl			
John Edwards	erik@fortes.nl			
Ruud v. Weerdenburg	r.vanweerdenburg@fortes.nl			
Samuel Davies	Davies@mail.com			

Members and Approvers of a Time Entry Group

3.4.1.3 Configuring the approval process

Approving timesheets can be set up in four different ways:

• Approval required by the project manager and line manager:





The approval process can be configured in these various ways using a number of settings. The steps to configure each approval process follow below.

Approval by project manager only

- 1. Navigate to Setup, Configuration, Time Entry, Settings, and set the setting 'Allow project manager to approve hours' to 'Yes'.
- 2. Open one of the project models and on the dashboard press 'Edit Properties'.
- 3. Within the section 'Time Entry' tick the box for 'Approval of project hours by project manager'.
- 4. The project manager will now be able to approve hours by project. To do so, the project manager opens a project, navigates to the **Resource Management** tab, and opens the **'Approve Hours'** screen. The project manager will get an overview of all the hours that have been submitted against the project and which require approval.

A similar overview, but then across all projects, can be found on the project manager's dashboard on the tab **'Approve Hours'**.

Dashboard	Properties -	Product Breakdown	Plan Gant	Resource M	anageme	ent 👻	Docum	ients 👻	Reports	Guide	Plaza				
Project:	Juno Proje	ect													
Select a	pplicable lines b	below to approve or rej	ect the hours.												
														(
Approve	hours											Approve	Reject	* Waiting for approval	 View Options
Week Re number	source 🔶	Product/Activity 🌲		Start Date 🚖	Mon	Tue	Wed	Thu	Fri S	it Sur	Ter	emarks by Own	er	Remarks by Ap	pprover(s)
45 Eri	k Aalbersberg	Highlight Report		07-Nov-2011		4.00)	4.00			8.00	0			
2 Eri	k Aalbersberg	Product A		07-Jan-2013		4.00) 4.00	5.00		-	13.0	0			

Approval by line manager only

In case a line manager needs to be able to approve timesheets, the line manager needs to be made an **Approver** on one or more **Time Registration Groups**.

- 1. Open a Time Registration Group from within the Time Entry module
- 2. Open the tab 'Members & Approvers'

- 3. Add the line manager to the 'Group Approvers' section by using the appropriate 'Add' button.
- 4. Any submitted timesheets by members of this time registration group will now appear on the personal dashboard of the line manager, ready to be approved (or rejected).

Automatic approval

Enabling **Auto Approve on Submit** will remove the need for line manager to approve timesheets. This setting is changes as follows:

- 1. Navigate to the Time Entry module
- 2. Open one of the Time Entry Configurations and enable the setting 'Auto Approve on Submit'
- The setting is now enabled for all Time Entry Groups that rely on this particular Time Entry Configuration.
 Note: this setting will now prevent line manager from approving timesheets, even in those case

Note: this setting will now prevent line manager from approving timesheets, even in those cases where they've been listed as **Approvers** on **Time Entry Groups**.

Configuring the right approval process

With the above knowledge in mind, the approval process can now be configured as required.

Approval by project manager and line manager

- 1. Enable the option to have project managers approve hours (see above for instructions)
- 2. Set the line manager up to approve hours (on the Time Registration Group)
- 3. Check that the applicable Time Entry Configuration is not set up for Auto Approve

Approval by line manager only

- 1. Set the line manager up to approve hours (on the Time Registration Group)
- 2. Check that project managers are not allowed to approve hours (see above for instructions)
- 3. Check that the applicable Time Entry Configuration is not set up for Auto Approve

Approval by project manager only

- 1. Enable the option to have project manager approve hours (see above for instructions)
- 2. Enable the **Auto Approve** on the applicable **Time Entry Configuration** (this will ensure that line managers are skipped)

Automatic approval

- 1. Enable the Auto Approve on the applicable Time Entry Configuration
- 2. Check that project manager are not allowed to approve hours (see above for instructions)

3.4.1.4 Submitting timesheets

Any timesheets that need filling out will appear on the personal dashboard of the employee on the tab **'My Time Sheets'**.

Му оре	en time sheets				
Week	Start Date 🚖	Owner	Time Sheet Status	Remarks by Owner	Time Entry Group
	6 04-Feb-2013	Erik Aalbersberg	New		ICT
	7 11-Feb-2013	Erik Aalbersberg	New		ICT
	8 18-Feb-2013	Erik Aalbersberg	New		ICT

My open timesheets on the homepage

Any open timesheets will be displayed as a listing. Click on the start date of the timesheet to open it. The following window will open:

vner:	Erik Aalbersberg					Time	Entry (Group:		ICT				
ne Sheet Status:	D New					Time	Sheet /	Addrov	er(s):	Erik Aalber	sbera			
st Saved By:	C. NEW					Rema	irks bv		/er/					
tal Hours:	0.00					Grou	p Mana	ger:						
nimum Hours:	0.00					Rema	IFKS DY	Owner						
art Date:	04-Feb-2013													
d Date:	10-Feb-2013													
prrection Time Sheet:														
ill in the hours for this wee idividual rows may need a	ek on the appropriate propriot of the provided provided by project man	oject and prod ager(s). This is Percentage	luct / act s indicat	vity. Hig ed by ic Tue	phlighter ons at th Wed	d rows (ie start) Thu	n yellov of the ro Fri	v) are p w. Sat	re-selec Sun	ted for time	entry by th	ne owner of t	he time sheet. Not	te that
ill in the hours for this wee idividual rows may need a Project neral	ek on the appropriate pr pproval by project man Product / Activity	oject and prod ager(s). This is Percentage Complete	luct / act s indicat Mon 4	vity. Hij ed by ic Tue 5	phlighter ons at th Wed 6	t rows (le start Thu 7	n yellov of the ro Fri 8	v) are p w. Sat 9	re-selec Sun 10	ted for time Totals	entry by th Remarks	ne owner of t	he time sheet. Not Remarks by Apj	te that
Ill in the hours for this wet adividual rows may need a Project Ineral Venus Project (Albert Swa	ek on the appropriate pr ppproval by project man. Product / Activity Project Initiation Docume	oject and prod ager(s). This is Percentage Complete 25%	luct / act s indicat Mon 4	vity. Hi ed by ic Tue 5	phlighter ons at th Wed 6	d rows (le start Thu 7	n yellov of the ro Fri 8	v) are p w. Sat 9	sun	ted for time Totals 0.0	entry by th Remarks	ne owner of t	he time sheet. Not Remarks by Apj	te that
Ill in the hours for this wee dividual rows may need a Project neral Venus Project (Albert Swi Apollo Project (Peter v	ek on the appropriate pr ppproval by project man Product / Activity Project Initiation Docume	oject and prod ager(s). This is Percentage Complete 25%	Mon 4	vity. Hij ed by ic Tue 5	yhlighteo ons at th Wed 6	t rows (e start Thu 7	Fri 8	v) are p w. Sat 9	Sun 10	Totals	Remarks	ne owner of t	he time sheet. Not Remarks by App	te that
Ill in the hours for this weed dividual rows may need a Project neral Venus Project (Albert Swa Apollo Project (Preter •) Zeus Project (Erik Aa •)	ek on the appropriate pr ppproval by project man Product / Activity Project Initiation Docume (On Project)	oject and prod ager(s). This is Percentage Complete 25%	Mon 4	vity. Hij ed by ic Tue 5	yhlightee ons at th Wed 6	f rows (ie start Thu 7	n yellov of the ro Fri 8	v) are p w. Sat 9	Sun 10	Totals	Remarks	ne owner of t	he time sheet. Not	te that
Ill in the hours for this weed dividual rows may need a Project Menus Project (Albert Swa Apollo Project (Peter + Zeus Project (Erik Aa + Venus Project (Albert +	ek on the appropriate pr ppproval by project man. Product / Activity Project Initiation Docume (On Project) Project Initiation Do ~	pject and prod ager(s). This is Percentage Complete 25%	Mon 4	vity. High	wed 6	t rows (e start) Thu 7	n yellov of the ro	v) are p w. Sat 9	Sun 10	Totals	Remarks	ne owner of t	he time sheet. Not	te that
III in the hours for this wee dividual rows may need a Project Menus Project (Albert Swr Apolio Project (Peter • Venus Project (Albert • Venus Project (Albert •	k on the appropriate pr ppproval by project man Product / Activity Project Initiation Docume (On Project) Project Initiation Do ~	oject and prod ager(s). This is Percentage Complete 25% 25%	Mon 4	vity. High	Wed 6	Thu 7	Fri 8	v) are p w. Sat 9	Sun 10	Totals 0.0 0.0 0.0 0.0 0.0 0.0 0.0 0.0 0.0 0.	Remarks	ne owner of t	Remarks by App	te that
III in the hours for this week dividual rows may need a project meral Venus Project (Albert Sw. Apolio Project (Peter	Ak on the appropriate pr ppproval by project man	oject and prod ager(s). This is Percentage Complete 25% 25%	Mon 4	vity. High	Wed 6	Thu 7	Fri 8	v) are p w. Sat 9	Sun 10	Totals 0.0 0.0 0.0 0.0 0.0 0.0 0.0 0.0 0.0 0.	Remarks	e owner of t	Remarks by App	te that
ill in the hours for this week dividual rows may need a Project Nenus Project (Albert Swi Apolio Project (Peter ~ Zeus Project (Peter ~ Apolio Project (Albert ~ Non-Project Adhert ~ Non-Project Adhwiles ~ Nañ-Broject Adhwiles ~	Ak on the appropriate pr ppproval by project man Product / Activity Project Initiation Docume (On Project) Project Initiation Do ~	oject and prod ager(s). This is Percentage Complete 25% 25%	Mon 4	Vity. Higher	Wed 6	Thu 7	Fri 8	v) are p w. Sat 9	Sun 10	Totals 0.0 0.0 0.0 0.0 0.0 0.0 0.0 0.0 0.0 0.	Remarks	e owner of t	he time sheet. Not	te that
ill in the hours for this week dividual rows may need a project and the second	ak on the appropriate pr ppproval by project man Product / Activity Project Initiation Docume (On Project) Project Initiation Do •	oject and prod ager(s). This is Percentage Complete 25% 25%	Mon 4	Vity. Higher	Wed 6	Thu 7 0 0.0	Fri 8	v) are p w. Sat 9	Sun 10	ted for time Totals 0.0 0.0 0.0 0.0 0.0 0.0 0.0 0.	entry by th Remarks 10 10 10 10 10 10	e owner of t	Remarks by App	te that
ill in the hours for this week dividual rows may need a Project Menus Project (Albert Swu Apolio Project (Peter • Zeus Project (Peter • Apolio Project (Peter • Make selection •	ek on the appropriate pr ppproval by project man Product / Activity Project Initiation Docume (On Project) Project Initiation Do •	oject and prod ager(s). This is Percentage Complete 25%	Mon 4	vity. Higher Hig	Wed 6 0 0.0	Thu 7 0 0.0	Fri 8	v) are p w. Sat 9	Sun 10	Totals 0.0 0.0 0.0 0.0 0.0 0.0 0.0 0.0 0.0 0.0 0.0 0.0 0.0 0.0 0.0 0.0 0.0 0.0	Remarks	se owner of t	Remarks by App	te that

A timesheet

When finished entering hours, press 'Save' or 'Save and Request Approval'. The latter option will only be available when an approval process has been set up.

After requesting approval, the project manager and / or the line manager will get the request for approval on their personal dashboard as a reminder. Please see <u>'Approving timesheets'</u> for instructions on how to approve the submitted timesheets.

3.4.1.5 Approving timesheets

Approval by project manager

When a timesheet has been submitted and it contains hours against the project manager's project, and the hours require approval, they'll appear on the project manager's personal dashboard. The tab **'Approve Hours'** will show a list of all hours that require approval.

Week Mon Tue Weed Thu Fri Sat Sun Total Remarks by Owner ♥ As/uno Project Enk Asheenberg Hobight Report 07.40x/2011 4.00 4.00 8.00 45./uno Project Enk Asheenberg Product/Activity 07.40x/2011 4.00 4.00 8.00 3./uno Project Enk Asheenberg Product A 07.40x/2011 4.00 4.00 8.00 2.4uno Project Enk Asheenberg Product A 07.4ax/2013 2.00 2.00	ours								Approv	e Reject - Custom view -	View Optio
45 Juno Project Erik Aabersberg Highlight Report 07-Nov-2011 4.00 4.00 8.00 45 Juno Project Erik Aabersberg Product A 07-Nov-2011 4.00 4.00 8.00 3 Juno Project Erik Aabersberg ~ 14-Jan-2013 2.00 2.00 2 Juno Project Erik Aabersberg Product A 07-Jan-2013 4.00 5.00 13.00	ect 🖕	Resource	Product/Activity	Start Date	Mon	Tue	Wed	Thu	Fri Sat	Sun Total Remarks by Owner	R
45 Juno Project Erik Aabersberg Product A 07-Nov-2011 4.00 4.00 8.00 3 Juno Project Erik Aabersberg - 14-Jan-2013 2.00 2.00 2 Juno Project Erik Aabersberg Product A 07-Jan-2013 4.00 5.00 13.00	o Project	Erik Aalbersberg	Highlight Report	07-Nov-2011		4.00		4.00		8.00	
3 Juno Project Erik Aabersberg 14-Jan-2013 2.00 2.00 2 Juno Project Erik Aabersberg Product A 07-Jan-2013 4.00 5.00 13.00	o Project	Erik Aalbersberg	Product A	07-Nov-2011			4.00		4.00	8.00	
2 Juno Project Erik Aalbersberg Product A 07-Jan-2013 4.00 4.00 5.00 13.00	o Project	Erik Aalbersberg		14-Jan-2013	2.00)				2.00	
	o Project	Erik Aalbersberg	Product A	07-Jan-2013		4.00	4.00	5.00		13.00	
2 Juno Project Erik Aalbersberg Product C 07-Jan-2013 1.00 1.00	o Project	Erik Aalbersberg	Product C	07-Jan-2013		1.00				1.00	
			m								

Approving hours

Approval by line manager

When a line manager has been registered as an approver on one or more time entry groups, a list of the submitted timesheets will appear on the line manager's personal dashboard.

Home /	Approve Hours	My Time Sheets								
Home							Customise Page T	ext Customise Home Pag	ge Edit Widgets	Q
P To	Prine Solb	cipal ox	We Her that	Icome on your perso re you have access to I have been assigned	nal homepage! information regarding pr to you such as issues, ri	rojects, products and other bisks, actions and timesheets.	usiness			
My ope	en time sheets					Documents to be app	proved by me			
Week	Start Date 🌲	Owner	Time Sheet Status	Remarks by Owner	Time Entry Group	Document	Location	Project I	Due Date 🌧	
	6 04-Feb-2013	Erik Aalbersberg	New		ICT	Hoofdpuntenrapport.rtf	Highlight Reports	Apollo Project	34-May-2010	
					107	Highlight_Report.rtf	rigniight Report	Apollo Project	24-010-20110	
	7 11-Feb-2013	Erik Aalbersberg	New		ICI				L+1-10g-2010	
	7 11-Feb-2013 8 18-Feb-2013	Erik Aalbersberg Erik Aalbersberg	New		ICT					_
	7 11-Feb-2013 8 18-Feb-2013	Erik Aalbersberg Erik Aalbersberg	New		ICT	Time sheets to be ap	proved by me			_

To be approved timesheets on the homepage

By clicking on the start date of one of the timesheets it opens and the line manager, after reviewing the contents, can choose to **Approve** or **Reject** the request for approval.

ne oncer z r-oun-z	013 - 27-Jan-201	13 (Erik Aai	bersb	erg)						Close	Approve	Reject	Approval Statu	s 🛛 🗖	1
wner:	Erik Aalbersberg					Time	Entry	Group		ICT					
ime Sheet Status:	Waiting for Timesh	eet Approval				Time	Sheet	Appro	ver(s):	Erik Aalb	ersberg				
ast Saved By:	Erik Aalbersberg	icci Approvar				Rem	arks by	Appro	ver /						
otal Hours:	30.00					Grou	p Mana	ager:							
linimum Hours:	0.00					Rem	arks dy	/ Owne	r:						
tart Date:	21.Jan.2013														
nd Date:	27.Jan.2013														
Correction Time Sheet:	2.1 0001 2010														
ndividual rows may need a	approval by project ma	nager(s). This is	indicate	ed by ic	ons at tř	ie start	of the r	OW.							
Pin in the nours for this we individual rows may need a Project	Product / Activity	Percentage	Mon	Tue	Wed	Thu	Fri	Sat	Sun 27	Totals	Remark	5	Remarks b	y Appro	over(s)
Project	Product / Activity	nager(s). This is Percentage Complete	Mon 21	Tue 22	Wed 23	Thu 24	Fri 25	Sat 26	Sun 27	Totals	Remarks	3	Remarks b	y Appro	over(s
Project Apollo Project (Peter Cole	Product / Activity	Percentage Complete	Mon 21 8.0	Tue 22	Wed 23	Thu 24	Fri 25	ow. Sat 26	Sun 27	Totals	Remark: 8.00	3	Remarks b	y Appro	over(s
Project Apolio Project (Peter Cole Apolio Project (Peter Cole	Product / Activity Intake-gesprek met ein Project Initiatie Docume	Percentage Complete dç 50% en 75%	Mon 21 8.0	Tue 22 4.0	Wed 23	Thu 24	Fri 25	ow. Sat 26	Sun 27	Totals	Remark: 8.00 4.00	5	Remarks b	y Appro	over(s
Project Project Apollo Project (Peter Cole Apollo Project (Peter Cole Apollo Project (Peter Cole	Product / Activity Intake-gesprek met ein Project Initiatie Docume Uitrol naar Client PCs	Percentage Complete dç 50% en 75%	Mon 21 8.0	Tue 22 4.0 2.0	Wed 23 0	Thu 24	Fri 25	ow. Sat 26	Sun 27	Totals	Remark: 8.00 4.00 2.00	3	Remarks b	y Appro	over(s
Project Project (Peter Cole Apollo Project (Peter Cole Apollo Project (Peter Cole Apollo Project (Peter Cole Venus Project (Abert Swi	Product / Activity Intake-gesprek met ein Project Initiatie Docume Uitrol naar Client PCs Initiat Project Plan	Percentage Complete dc 50% en 75%	Mon 21 8.0	Tue 22 4.0 2.0	Wed 23 0 0 6.0	Thu 24	Fri 25	Sat 26	Sun 27	Totals	Remark: 8.00 4.00 2.00 6.00	3	Remarks b	y Appro	over(s)
Project Project Project (Peter Cole Apollo Project (Peter Cole Apollo Project (Peter Cole Apollo Project (Peter Cole Venus Project (Albert Sw: Venus Project (Peter Cole	Product / Activity Intake-gesprek met ein Project Initiate Docume Uitrol naar Client PCs Initial Project Plan Project Authorisation	Percentage Complete dç 50% en 75% 0% 0%	Mon 21 8.0	Tue 22 4.0 2.0	Wed 23 0 0 6.0 2.0	Thu 24 0 0 4.0	Fri 25	Sat 26	Sun 27	Totals	Remark: 8.00 4.00 2.00 6.00 6.00	3	Remarks b	y Appro	over(s)
Project Project Apolio Project (Peter Cole Apolio Project (Peter Cole Apolio Project (Peter Cole Apolio Project (Peter Cole Venus Project (Abert Swi Venus Project (Abert Swi	Product / Activity Intake-gesprek met ein Project Initiatie Docume Uitrol naar Client PCs Initial Project Plan Project Authorisation Project Initiaton Docum	Percentage Complete dc 50% en 75% 0% 0% 0% e 25%	Mon 21 8.0	Tue 22 4.0 2.0	Wed 23 0 0 0 0 0 0 2.0 0	the start Thu 24 0 0 4.0	Fri 25 0	Sat 26	Sun 27	Totals	Remark: 8.00 4.00 2.00 6.00 6.00 4.00	3	Remarks b	y Appro	over(s
Finith the nours for this we denote the nours for this we denote the nours for the second sec	Product / Activity Intake-gesprek met ein Project Initiate Docum Uitrol naar Client PCs Initial Project Plan Project Authorisation Project Initiation Docum	Percentage Complete dg 50% an 75% 0% 0% 0% 0% 0% 0% 0%	Mon 21 8.0	4.0 2.0 4.0 2.0 4.0 2.0 4.0 2.0 4.0 2.0	Wed 23 0 0 0 0 0 2.0 0 0 0 0 8.0	Thu 24 0 0 4.0	0 0 0.0	Sat 26	Sun 27	Totals	Remarks 8.00 4.00 2.00 6.00 6.00 4.00 0.00	3	Remarks b	y Appro	over(s
Project eneral Apolo Project (Peter Cole Apolo Project (Peter Cole Apolo Project (Peter Cole Apolo Project (Peter Cole Venus Project (Abert Swr Venus Project (Abert Swr	Product / Activity Intake-gesprek met ein Project Initiatie Docume Uitrol naar Citern PCs Initial Project Plan Project Authorisation Project Initiation Docum	Percentage Complete dç 50% en 75% 0% 0% 0% 0% 0% 0% 0%	Mon 21 8.0 8.0	4.0 2.0 4.0 2.0 4.0 2.0	Wed 23 0 0 0 6.0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	Thu 24	of the re Fri 25 0	OW. Sat 26	Sun 27	Totals	Remark: 8.00 4.00 2.00 6.00 6.00 6.00 4.00 0.00	5	Remarks b	y Appro	over(s
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Approving a timesheet

3.4.2 Time and cost allocations

Against products, part of a project, cost and hour entries can automatically be generated from the timesheets that have been submitted. The tab 'Costs & Hours' on each product will then list all the costs and hours in line with the timesheets from project team members that registered hours against the project.

The costs associated with the hours that the team member registered are based on an hourly rate. Each resource has its own hourly rate, as defined in the Setup. Besides this personal hourly rate, the project manager can be allowed to override that rate for a project specific rate. To enable the automatic generation of cost and hour entries based on time entry, take the following steps.

- 1. Define and allocate hourly rates 123
- 2. Let project managers set hourly rates 124
- 3. Get cost and hour entries against individual products 126

3.4.2.1 Defining and allocating hourly rates

Defining hourly rates

Before assigning hourly rates to individual resources, define the rates as follows:

- 1. Navigate to Setup, Configuration and click on 'Manage Hour Rates'
- 2. Click 'New' to add a new hourly rate
- 3. In the window that appears, choose a name, a description, a code (free text), and the hourly rate in

dollars (or applicable currency).

Configuration				
Options Principal Toolbox Notifications M S Project integration Comparison Resource Categories Resource Categories Manage Skils Time Entry Manage entries Manage skils Categories Manage skils Categories Manage skils Categories Manage Skils Categories Manage Skils Prince Entry Manage entries Manage Non-project Addi Resource Allocation Categories Approval entries	++	Manage Hour rate This listing sho Hour rates Name @ Rate 100 Rate 1100 Rate 1120 Rate 1220 Rate 1220 Rate 1220 Rate 1200 Rate 120000	I you in the second se	New Remove

New hour rate

4. Once saved, the hourly rate will be available to be assigned to resources.

Allocating hourly rates

- 1. From within Configuration navigate to 'Manage Resources'
- 2. Edit one of the resources by clicking on its first name
- 3. The window that appears allows to set one specific hourly rate for this resource.

Configuration													
Options	++		Manage Resources										
 Principal Toolbox Notifications MS Project integration Conversions Manage Hour Rates 			 Here you can many There are two type Resources Resources 	age the resources for th s of resources: that are <u>not</u> linked to a that are linked to a use	e resource allocation. I user account . These er account. For these	e resources can be resources only so	e added, rei me properti	noved ies (like	and moo skill) ca	dified an be	freely. edited.		
Resource Categories			Resources (no users	-)			Edit	New	Rem	ove	* Resources		View Options
Financial Categories			Last Name 🔶	First Name	Primary Skill	Secondary Skill(s) Email				Phone		Remarks
Manage Resources			Bloemen	Pieter	Project Manager IC	T Consultant (Sr.)	Peter@	mail.cor	m		+31 53 2314	357	
 Time Entry Manage entries Manage Non-project Activi Resource Allocation Customize fields Approval entries 	ty Sets	P	Principal Toolbox® (Princ http://asp.fortes.nl/Princ eter Cole	cipal) - Windows Interne	er.jsp?PageID=130380	y Principal Toolbo &PageDef=Resour Ed	ceDetails		×	dit	* Resources Phone	ŀ	View Options Remarks
		F	irst Name:	Peter	Primary Skill:	S	ftware Deve	loper					
		L L	.ast Name:	Cole	Secondary SI	kill(s):							
		1	nitials:	Ρ.	Default Hour	Rate: Ri	te 120.0						
		E	mail:	p.cole@fortes.nl	Remarks:								
		F	Phone:										
		_	Ji-Lao	Yung	Software Developer	Software Enginee	r y.ji-lao@	gmail.co	om	-			
			Kent	Clark	Software Engineer	-	Kent@r	nail.com	1				

Managing resources

3.4.2.2 Letting project managers choose hourly rates

It's possible to let the project manager choose hourly rates for the resources on a project. This feature has to be enabled in the Setup and on the project model.

Setup

- 1. From within **Configuration** click on **Time Entry**.
- 2. Open the Settings, and enable the setting 'Allow project manager(s) to configure hour rates per resource'.

Configuration				
Options ++ Principal Toolbox Notifications Manage Hour Rates	Settings Module name: Time Entry Settings for Time Entry Customize the following settings by clickin To save any changes, click 'OK' or click' C	g on the edit button. ancel to return to the curre	nt settings.	Edit
Currencies Resource Categories Financial Categories Manage Resources	Settings	Value	-	
Manage Skills Time Entry Settings	Allow project manager(s) to approve hours Allow project manager(s) to configure hour	Yes No	(Custom)	
Exclusions for PM-approval Manage time sheets Manage entries	rates per resource Support for Activity Planning	No		
Manage Non-project Activity Sets Resource Allocation				

Allow project manager(s) to configure hour rates per resource

Project Model

- 1. Open one of the project models
- 2. At the project model's dashboard press 'Edit Properties'
- 3. Enable the setting 'Configuration of hour rates per resource by project manager'.

Edit Project Model	
Properties	
Name:	Standard Prince2 2009 Project Model (UK)
Objective:	Project model for larger a
Status:	
Status Description:	
Project Color:	
References	
Resource Pool(s):	Selected Resource Pool(s)
	Resource Pool: Database
	Resource Pool: IT
	-
	4
Planning	
WARNING: Changing the planning type	causes recalculation of start and end dates! Newly calculated dates may differ.
Product Planning Type:	Principal Toolbox + Planning Export
Time Entry	
Approval of project hours in timesheets by project manager(s):	<u>ज</u>
Configuration of hour rates per resource by project manager:	ज र
Time entry on project level only:	

Edit properties on projects

After this setting has been enabled, the project manager can alter the hourly rate for the resources on the project. This is achieved as follows:

- 1. From the project dashboard, click on the tab 'Resource Management' and choose for 'Resource Rates'
- 2. Press the 'Edit' button and set the required hourly rate for each resource on the project.

Dashboard	Properties -	Product Breakdown	Plan	Gantt	Resource Management	•	Documents -	Reports	Guide	Plaza	
Project:	Juno Proje	ect									
Select a	project specific	hour rate for the resou	urces th	iat are m	nember of this project. If no	pro	oject specific hou	ir rate is se	et, the de	fault hou	Ir rate is used for the time entry process.
Project R	esources										Save Cancel
Name (Res	ource) 🔶				F	Proje	ect Specific Hour I	Rate	D	efault Ho	ur Rate (Resource)
Arjan van d	er Laan				-				▼ R	ate -1.0	
Ivo Rings										e -1.0	
Samuel Da	vies					Rate	e 0.0 e -1 0			e -1.0	
						Rate Rate Rate Rate Rate	e 100.0 e 110.0 e 114.0 e 120.0 e 150.0 e 56.0			-	

Assigning project specific resource rates

3.4.2.3 Time and cost allocations against products

After setting the appropriate hourly rate, each time a timesheet has been approved hour entries will be allocated against the appropriate products. Costs will be associated with the hours based on the applicable hourly rate: either the resource's rate, or if set, the rate as defined by the project manager. The generated hour and cost entries are listed on the **'Costs & Hours'** tab on each product.

General Logs	Dependencies	Costs & Hours	Resource Demand						
Product: Hig	hlight Repo	rts					Edit	Close	
Hours	Manual	Entries	Total	Cost	s Manua	al Entries	T	otal	
Budget:	0.00	0.00	0.00	Bud	get: 0.00	0.00	0.0	0	
Committed:	0.00	0.00	0.00	Com	mitted: 0.00	0.00	0.0	0	
Actual:	0.00	0.00	0.00	Actu	al: 0.00	0.00	0.0	0	
Remaining:	0.00	0.00	0.00	Rem	aining: 0.00	0.00	0.0	0	
Variance:			0.00	Varia	ince:		0.0	0	
Product Quality	·:								
Finance									
Total Actuals:		0.00							
Cost / Hour Ent	ries listing				New Cost / Hour Entry	* All entries	.	/iew Optior	ns 🔻
Description	Type	Ap	proval Status H	ours Owner	Creator	Book Date	A Remarks by	Owner	

Cost & hours tab on products

4 Automated Reports

Reports can be used in projects to generate reports about your projects. Reports can be created in the Principal Toolbox and both in Word and in Excel. The Word reports offer more possibilities for editing *after* generating the report, while the Excel reports offer more flexibility in working with tables. It is also possible to use so-called ' Timeline reports' to show information over time.

The automated report functionality of Principal Toolbox has especially been designed to allow you to create and edit your own automated reports.

4.1 Automated reports

Note: automated reports within projects are available to project managers and project support. On programme level they are available to the programme manager.

Note: Normally, automated reports will be provided with the project model(s) of your organisation. It is possible, however, to create your own reports for your programme or project.

Automated reports can be used in projects to automatically generate reports about your projects. Automated reports can be created both in Word and in Excel. The Word reports offer more possibilities for editing *after* generating the report, while the Excel reports offer more flexibility in working with tables.

The automated report functionality of Principal Toolbox has especially been designed to allow you to create and edit your own automated reports.

Principle of automated reports

Automated reports use keywords that are replaced with data from the Principal Toolbox database. This can be either simple content of fields, like a project name and a start date, or complete tables. These tables are the views (either pre- or self-defined) at various locations in Principal Toolbox. The keywords, which include references to the views, can be found in the 'Keyword reference'. When clicking a keyword, it is copied to the Windows clipboard. You can now paste the keyword in your report template. After saving the template on your system, upload it to Principal Toolbox and the report is available for use.

Note: some applications empty the clipboard when they are started up. In this case, first open the application and then click the keyword.

Where to find and manage automated reports

Within projects:

On the project dashboard in the section 'Automated reports' or at a specific product page.

	New	Total	Prod	lucts Project start-up			Edit	Owner & Miles	tones Edit	Project Plan	Set Ba	aseline	4	-	
I Issue log		10	Ē	Project initiation											
R Risk log		4				Owner	Start	Draft	Checked	Final	P) [n D	RQ		
Q Quality review log		1	1	Initial Business Case		John Edwards	~			~					
C Change log		2	1	Project Initiation Document		John Edwards	\checkmark	\checkmark	\checkmark	\checkmark	-	1 2	1 -		
A Daily / Action log		13	•	Project Authorisation		Samuel Davies	\checkmark	07-Feb-2013		12-Feb-2013					
L Lessons learned log		1	_	De sula secta A Destatusia s											
(M) Minutes of meetings		1	-	Requirements & Prototyping		Oumer	Claud	Draft	Cheeked	Final	111	നെ			
		_				Owner	Start	Draft	Checked	Final	P	200	RQ	CA	
Automated Reports		Edit		Pilot Preparation (Work Package	9	Jeroen van Barneveld	14-Feb-2013			27-Feb-2013		- 3			
Report Progress Report				Requirements report		Yung Ji-Lao	14-Feb-2013	18-Feb-2013	19-Feb-2013	20-Feb-2013		1 1		1 -	
I Kabiata Daarat				Database configured		Samuel Davies	17-Feb-2013			27-Feb-2013	-		1 1	1 -	
Highlight Report															
				Pilot (Workpackage)		Peter Cole	16-Feb-2013			01-Mar-2013					
My to do List				User instruction		Richard Hammond	23-Feb-2013			01-Mar-2013					
2: Find out about costs Japanese version	Α		X	Pilot evaluation		Richard Hammond	16-Feb-2013			01-Mar-2013					
				Highlight Reports		Peter Cole	24-Feb-2013			01-Mar-2013		1 -			
				lext Stage Plan		Yung Ji-Lao	01-Mar-2013	01-Mar-2013		04-Mar-2013	-				
				t Stage Authorisation		John Edwards	02-Mar-2013			05-Mar-2013	-				
				utamatad Damanta				(_	-
			0	Automated reports Automated reports insert Princip actual content (data) on generat Select a merge template or norm Excel merge templates must be For a list of keywords, click on th	al Toolbox data into a W ing the report. al document / link to upl based on the basic temp ie 'Keyword List' button.	ord or Excel merge tem oad. Please note that V late which contains req	nplate. The Pr Vord merge te uired macro's	incipal Toolbox implates can be . Click on the 'E	keywords in based on ar bownload Ter	the template a ny document b nplate' button	ut must to down	matica be sav load th	lly rep /ed in 1e terr	laced by the RTF iplate.	the
			Ð	Automated reports actual content (data) on general Select a merge template or norn Excel merge templates must be For a list of keywords, click on th emplates	al Toolbox data into a W ing the report. al document / link to upl based on the basic temp re 'Keyword List' button.	ord or Excel merge tem oad. Please note that V late which contains req Add Dor	Vord merge te Vird merge te uired macro's wnload Temp	incipal Toolbox implates can be . Click on the 'C	keywords in based on ar bownload Ter	the template a ny document b mplate' button	ut must to down Remove	matica be sav load tr	Ily rep red in te terr	laced by the RTF iplate.	C y the ⁼ form Upd:
			Ð	Automated Reports Automated reports actual content (data) on general Select a merge template or norm Excel merge templates must be For a list of keywords, click on th emplates Name	al Toolbox data into a W ing the report. al document / link to upl based on the basic temp re 'Keyword List' button.	ord or Excel merge tem oad. Please note that V late which contains req Add Do	nplate. The Pr Vord merge te uired macro's wnload Temp	incipal Toolbox implates can be . Click on the 'C late Keyword Revis	keywords in based on ar bownload Ter d List Oper ion Publish	the template a ny document b mplate" button n Template	re autor ut must to down Remove ter	matica be sav load th 3 St	Ily rep red in the terr tow H	laced by the RTF plate. story pe	C y the ⁼ form Upda
			Ð T E	Automated Reports Automated reports insert Princip actual content (data) on general Select a merge template or norn Excel merge templates must be For a list of keywords, click on th "emplates Name Project_Report/2.xis	al Toolbox data into a W ing the report. Tail document / link to upi based on the basic temp te 'Keyword List' button. Description Progress Report	ord or Excel merge tem oad. Please note that V late which contains req Add Do	nplate. The Pr Vord merge te uired macro's wnload Temp	incipal Toolbox implates can be . Click on the 'C late Keyword Revis v1.4	keywords in based on ar bownload Ter d List Oper ion Publish 09-Apr-	the template a ny document b mplate" button n Template led Publish 2010 Erik Aa	re autor ut must to down Remove rer Ibersber	matica be sav load tr 3 St	Ily rep ved in te terr tow H Men	laced by the RTF plate. istory	y the form

Click 'Edit' at automated reports to manage reports within a project or project model

					del Martes Dama	Ohan	Linter	Undet
leliverables							Add A	Add Note
To inform the project boa projectmanager regulary	rd and other project stakeholders about the pr creates a Highlight Report with a summary of	oject progress, the the project status.						
lelpful Text:								
otal Actuals:	0.00							
inance								
Product Quality:	-							
landatory:	П	Planning Status:						
Priority:		Duration:		3.00				
eviewer: Participants:	John Edwards	Final:	22-	Mar-2013				
)wner:	Richard Hammond	Checked:						
)wner Group:	Project Manager	Start:	20-	Mar-2013				
ame:	Highlight Reports		Pl	lanned ate	Actua	l date		

On product pages templates for automated reports can be added as well

Within programmes / project lists: On the dashboard, at the section 'Automated reports'.

Dashboard Properties - Gantt & Depe	endencies Benefits Monitor Documents & Know	wledge Models Archive							
Project list: Quality and Orga	nisation projects		Edit Pr	roperties Edit Men	nbers	Edit Tolerances	Edit Widg	jets 🛛 🖾	ē Q
Name: Quality and Organisation projects Description: Projects for improving the organisa (more.) Status:		Welcome on the startpa	ge of this progra	mme!					
Logs	Projects	New	Import Export	Move Model	Archive	* Dashboard		View	Options -
New Total			Current Stage	Progress	General	Planning Hours	Costs	Project Mana	ager(s)
I Issue log	Apollo project		Project initiation		•	• •	•	Arjan van de	r Laan
R Risk log	Roll-out of software on desktops		12-Feb-2013				-		
A Daily / Action log 2	Juno Project		Project initiation		•	•	•	John Edward	ds
	Back-up of all previous documents		25-May-2010				-		
	Venus project		Project start-up		•	• •	•	Peter Cole	
Automated Reports Edit	Zeus Project		Project start-up			•		Henk Visser	
Project Report	Roll-out Zeus on clients		02-Sep-2010			•			
Reports	Project Models						Imnor	Evnort	Archivo
Drogrammen / Droject lists	Name						impor	Export	Archive
Projects	Name 🌲		Objective					Owner(s	
Products / Plan Items	Small Prince2 project model		Project mode	I for small and midsize	projects				
Issues	Software implementation project model		Prince2 proje	ect model for software i	mplement	tations			
Risks	Standard Prince2 project model		Project mode	I for larger and/or com	plex proje	ects.			
Quality reviews									
Actions									
Lessons learned									
Cost / Hour Entries									
Benefits									
Periormance mulcators Project Resources									
Entries									
Timeline Reports									
Entring									
Linues									

Automated Reports on a programme

In the next sections, you will find more detailed information about creating and managing automated reports.

4.1.1 Automated Word reports

Note: Word reports are based on templates that have to be saved as Rich Text Format (*.rtf) files.

- 1. Go to the dashboard and click the button '**Edit**' in the Automated report header, or go to the specific 'Product' page where you want to insert the new automated merge report.
- 2. You can do any of the following:

- Open Template a. Open one of the templates already present, by clicking
- . The template will be opened, and at the same time Principal Toolbox will open a window with the 'Keyword Reference'. b. Start with a 'normal' or new Word document. Click Keyword Reference to open the window containing the keywords.
- 3. The Keyword Reference window will open where you can select the keywords. To select a keyword, just click it.

8	🎒 Principal Toolbox® (Principal) - W	findows Internet Explorer provided by	Principal Toolbox			x
	kttp://asp.fortes.nl/Principal/jsp/	Reports/MergeFields.jsp?PageID=1226.	38&SetReturnAdrs=false&PopupSib	ling=true		
	Keyword List				Close) A
	 Lookup the available fields and v Paste the keyword in your merge 	views and click the link to copy the key e template at the appropriate location.	word to the clipboard.			Е
	Project fields					
l	Baseline	Capacity planning	Costs	Costs		
	Current Baseline Final Current Baseline Stat Current Baseline Start Initial Baseline Final Initial Baseline Stat Initial Baseline Start	IT Capacileti (Custom28) PM Capacileti (Custom29)	Budget (Custom 11) Costs Actual Costs Actual Costs Actual Costs Budget Costs Budget Costs Budget Cumulative Costs Committed Costs Forecast Costs Forecast Costs Remaining Costs Remaining Cumulative Costs Reserved Costs Reserved Costs Variance Costs Variance Costs Variance	EAC (Custom14) ETC (Custom13)		
	Costs Tolerance	Finance	Hours	Hours Tolerance		
	Costs Active Stage Only Costs Orange (%) Costs Orange (Abs) Costs Red (%) Costs Red (Abs)	Total Actuals (Custom32) Total Budget (Custom32) Total Forecask (poject) (Custom34) Total Reserved (Custom36)	Hours Actual Hours Actual Cumulative Hours Budget Cumulative Hours Committed Hours Committed Hours Remaining Hours Remaining Hours Remaining Hours Statiance Hours Variance Hours Variance	Hours Active Stage Only Hours Orange (%) Hours Orange (Abs) Hours Red (%) Hours Red (Abs)		Ŧ

Keyword list

- 5. Go back to your template in Word. Look up the position where you want to paste the keyword. Pasting can be done in two ways:
 - a. By selecting Paste in the Edit menu
 - b. With the shortcut key CTRL+V.
- 6. Finish the automated merge report and save it as an RTF-file.
 - a. Choose Save As in the File menu
 - b. In the dialogue, choose an appropriate folder for your template.
 - c. At Save as type choose Rich Text Format (*.rtf)
 - d. Click Save to save the template

W Save As				×
🚱 🕞 🗢 💻 Deskto	op 🕨	• 49	Search Desktop	Q
Organize 🔻 Ne	w folder			• 📀
Favorites	Libraries System Folder Erik Aalbersberg			E
Recent Places	System Folder			
 Documents Music Pictures 	• Network System Folder			-
File <u>n</u> ame:	Highlight Tour			
Save as <u>t</u> ype:	Rich Text Format			
Authors:	Erik Aalbersberg Tags: Add a ta	9		
Hide Folders	Tools	•	Save	ancel

Add 7. Go back to Principal Toolbox. To upload the merge template in the Principal Toolbox, click the Templates section (in the Edit Automated Reports window or on a product page). Fill in the

in

following information:

Description Revision/Doc nr. Filename Internal document link	:	This will be the title of the report shown on the dashboard Use this to give a version number to your template Locate the RTF-file with the browse button Provide a document ID from a document at another location in the Principal Toolbox application. The ID can be found in the document history.
		The state of the second state in the second state of the last state of the state of the second state of th

This allows for a centrally placed document to be linked to from projects. Update by updating only the original centrally placed document.

8. IMPORTANT: Make sure the checkbox 'Document is a merge template' is ticked!

Add a document to	the list	Download Template	Keyword List
Select a merge template on any document but mus contains the necessary m	or normal document / link to upload. Please note that st be saved in the RTF format. Excel merge templates acro's: Click on the 'Download Template' button to do	Word merge templates s must be based on a te wnload the template.	can be based mplate which
For a list of keywords, clic	k on the 'Keyword List' button.		
Add a document/link			
Description:	[
Revision/Doc Nr.:			
Filename:	Browse (rtf,xlt,xltm,xls,xlsr	n,rptdesign)	
Merge Template:	Add this document as a merge template		
U Internet autress.			
Internal Document Link:	Provide a document ID from location in this application. The the document history.	a document at another his ID can be found in	
OK Cancel			

Adding a Word file

- 9. Click 'OK' to add the merge template to the Principal Toolbox.
- 10. The document is now available as an Automated Report. If you added it to the section Automated Reports on a programme / project list or project dashboard, you will find it in the list Automated Reports. If you added it to a product page, it will appear in the list 'Templates' on the General tab.
- 11.To generate the Automated Report click the template name and it will open in a new window.
- 12. After the report is opened in a new window it can be altered and then saved. In order to make the report available to the project team it is necessary to upload it in the Principal Toolbox.

Note: To edit the automated report or merge template later on, go back to step 2a and continue.

Note: In RTF templates the system setting (default or custom) is used for language, not the personal locale.

4.1.2 Automated Excel reports

The Microsoft Excel reporting allows you to create well formatted reports based on Principal Toolbox data. The reports can be extended with charts.

An automated report for Excel must to contain macros to be able to retrieve data from Principal Toolbox. Therefore, you need to be able to run macros to generate these reports. The Excel reports are based on a special Principal Toolbox template. This template contains keyword that point to fields and views in Principal Toolbox. When generating a report, these keywords are replaced by data from the Principal Toolbox.

In this section, we will explain how to generate Excel reports. Creating and editing templates yourself is possible, even with basic Excel knowledge Some of the more advanced features would require some more knowledge of Excel. The topics can be found below:

- Using an Excel report
- Creating an Excel report template
- Advanced topics 140.

Note: automated reports within projects are available to project managers and project support. On programme level they are available to the programme manager. You will need sufficient rights on your computer to run Excel macros.

4.1.2.1 Using an Excel Report

To generate an Excel report, you can click the report name, on a programme / project list dashboard, or on the project dashboard. In the example below, the available Excel report is shown and can be clicked by the user.

Organisation > Production (EN) > Quality an	nd Organisatio > Apollo project										~
Dashboard Properties - Product Break	xdown Plan Gantt Resource Management 🗸	Documents 👻 Portfolio F	Report Repor	rts Guide							
Project: Apollo project			Edit F	Properties	Edit Members	Pack Projec	t Offline	\boxtimes		Q	
Objective: Roll-out of software on desktops Members: Arian van der Laan (more 1	Project start-up Project initiation	Stage 1 Stage 2 Requirements &	Prototyping	F	Project closu	е					
Status:	Directing a Project										
On schedule. Info: Behind schedule Etc	Starting Up a Project	Directing a stage	Managing stage boundaries		osing a Project						
FORTES		Managing Project Delivery									Е
		C	Project Board (O Project Mana	iger <mark>O</mark> Team M	embers					
anol	Products		E dit C	waar 9 Miloo	tonos Edit I	Project Plan	Pot Basal	line	.		
New Total	Project start-up		Luit	When a miles	Luit	TOJECT I I III	Jet Dase		****	-	
I Issue log 10	Project initiation										
R Risk log 4	- Project initiation	Owner	Start	Draft	Checked	Final	PD		റെ	A	
Q Quality review log 1	Initial Business Case	John Edwards	 ✓ 			~				-	
C Change log 2	Project Initiation Document	John Edwards	\checkmark	\checkmark	\checkmark	\checkmark	- 1	2 1		-	
A Daily / Action log 13	Project Authorisation	Samuel Davies	\checkmark	07-Feb-2013		12-Feb-2013				-	
Lessons learned log	Requirements & Prototyping										
M minutes of meetings		Owner	Start	Draft	Checked	Final	P D	R	QC	A	
Automated Reports	Pilot Preparation (Work Package)	Jeroen van Barneveld	14-Feb-2013			27-Feb-2013		3 -		-	
XI Progress Report	Requirements report	Yung Ji-Lao	14-Feb-2013	18-Feb-2013	19-Feb-2013	20-Feb-2013	- 1	1 -	- 1	-	
	Database configured	Samuel Davies	17-Feb-2013			27-Feb-2013		- 1	1 1	-	
	Pilot (Workpackage)	Peter Cole	16-Feb-2013			01-Mar-2013				-	
My to do List	User instruction	Richard Hammond	23-Feb-2013			01-Mar-2013				-	
2: Find out about costs A Japanese version	Pilot evaluation	Richard Hammond	16-Feb-2013			01-Mar-2013				-	
	Highlight Reports	Peter Cole	24-Feb-2013			01-Mar-2013	- 1 -			-	-

Automated reports on the project dashboard

When the Excel report is downloaded, the following message is shown to you by your browser.

Do you want to open or save Project_Reportv2.xls from asp.fortes.nl?	Open	Save	•	Cancel	×

In this dialog, click **'Save'** and select an appropriate location for the template. Then click **'Open'** to open the report in Excel. Saving the report first ensures that the Excel file will be opened correctly. If opened directly, the required support macro's included in the Excel file will not be started.

Note: always Save an Excel report before opening it!

When opening the file in Excel, the data is automatically 'refreshed' with the currently available data.

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File H	iome Ins	ert Page	Layout	Formulas Data Review View Add-Ins	Acrobat				۵ 😭	- 5	83
Contribute		Open In Co	ntribute 🗖	Publish To Website 💀 Post To Blog							
Drin cin al T	aalbay x	vincinal Teella	av Danasta	Incart Chart Paced on DT Data Intern Direct Direct Table	Pared on DT	Data 🖻 👘 🗍					
Philipario			ox Report.	iniseri chari based on Pi Data iniseri Pivot Table	based on Pr						
		rincipal looib	ox remplate	Show / Hide Keywords 😰 Refresh Pi Data 🖓 O	pen keyword	LIST Save as PI	Merge Template				
Menu Comr	mands			Custom Toolbars							
B17	7	▼ (0	f_{x}								~
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Dro	inat	loou	<u></u>	~							
	ject	Issu	его	g							
2											
3											_
4 Name	Apollo pr	oject									- 1
5	Driority	Ctotus	Mr	Description	Tuno	Decision	Oumor	Due Dete	Domorka		- 1
6	Fliolity	Status	INI	Description	Type	Decision	Owner	Due Date	Remarks		
7	Low	Open	8	Slow Internet connection	Issue	Open	Samuel Davies	23-4-2010	Contact IT to find out why		
8	Critical	Open	7	Bug found in version 7	Off-spec	Assigned	John Edwards	1-4-2010	Try to reproduce the error to find the bug		
9	High	Open	6	Delay in system development	Concern	Deferred	Jeroen van Barneveld	17-6-2010	Maybe we should adjust the planning		
10	High	Open	5	Request for change of the page layout	RFC	Approved	Yung Ji-Lao	30-4-2010	Look for new design		
11	High	Open	4	Different page layout	RFC	No Action	Samuel Davies	1-4-2010			
12	Low	Open	3	Request for more background material	RFC	Resolved	Richard Hammond	28-5-2010	Acquired all the material		=
13	Critical	Open	2	Request for roll-out on Macintosh machines	RFC	Investigation	Samuel Davies	19-4-2010			
14	High	Closed	1	The PID does not include a proper risk analysis	Concern	Investigation	Gerard Mesen	31-12-2004			
15											
16	_										- 11
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25											
26											
27											_
Ready R	eport / Da										4
Ready	_		_		_						

Automated issue log in Excel

If you want to add the report as a deliverable in a project, add it as a deliverable. See section adding documents to products 59.

4.1.2.2 Creating an Excel Report Template

Creating an Excel report template is done by following these steps:

- 1. Download a basic Excel report template 132
- 2. Open the template and insert keywords 134
- 3. Create charts 136 and Pivot tables 137 based on the Principal Toolbox data
- 4. Finish the template and make the report template available within the T39 Principal Toolbox

For more advanced topics, see the <u>'Advanced Topics'</u> [140] chapter.

4.1.2.2.1 Open the basic Excel Report Template

Note: you need to be manager of the programme or project to create and edit report templates. Within a project, also project support can do this.

To create an Excel report template, log in to the Principal Toolbox application and navigate to the 'level' on which you want to place an Excel report. For example, when you want to create a project report, navigate to the project. When a programme report needs to be created, navigate to a programme where you have access to the automated reports.

On the chosen level, click the **Edit** button to access the available automated reports. A page as shown below should appear.

Automated Report	СІ	ose								
Automated reports insert Principal Toolbox data into a Word or Excel merge template. The Principal Toolbox keywords in the template are automatically replaced by the actual content (data) on generating the report.										
Select a merge template or normal document / link to upload. Please note that Word merge templates can be based on any document but must be saved in the RTF format. Excel merge templates must be based on the basic template which contains required macro's. Click on the 'Download Template' button to download the template. For a list of keywords, click on the 'Keyword List' button.										
Templates	Add Download Template Keyword List Open Template Remove Show History Upda	ite								
Name	Description Revision Published Publisher Merge									
Project_Reportv2.xls	Progress Report v1.4 09-Apr-2010 Erik Aalbersberg 🗸									
Highlight_Report.rtf	Highlight Report v 1.4 20-Aug-2010 Erik Aalbersberg 🗸									

Automated reports page.

On this page, click the **'Download Basic Excel Template'** button to download an empty template that can be used as a start for creating the report template. Instead of starting a new template, an existing template can be used to modify, if one is available. In this case, click the 'Open template' button on the Excel template in the list.

When the Excel template is downloaded, following message is prompted by the browser.

Do you want to open or save Project_Reportv2.xls from asp.fortes.nl?	Open	Save	•	Cancel	×
--	------	------	---	--------	---

In this dialog, click **'Save'** and select an appropriate location for the template. Then click **'Open'** to start configuring the template in Excel. Saving the template first ensures that the Excel file is opened correctly. If opened directly, the required support macro's included in the Excel file will not be started.

On completion, you should have the Excel file opened on the work station as shown below. When prompted whether to enable or disable macro's, click to enable macro's (as they are required to use the template correctly).

X	9.0-	- 1	-		-	M	SExcelClient	(14) [Comp	atibility Mod	e] - Microso	oft Excel						- 0	×
File	Home	Insert Pag	ge Layout	Formulas	Data R	eview 1	View A	id-Ins A	crobat									- ar 23
Co	ontribute *	Ct Open In	Contribute 🐰	Publish To	Website <u>ज</u> ि F	Post To Blog												
Pri	incipal Toolbox	 Principal Too 	lbox Report:	📶 Insert Ch	art Based on F	ग Data 👔	Insert Pivot	Table Based	on PT Data	1 👜 🛛								
		Principal Too	lbox Template	: 🧱 Show /	Hide Keyword	is 😰 Refre	sh PT Data	🖓 = Open Ke	yword List S	ave as PT Me	rge Template	2						
Me	nu Commands					Custom T	oolbars											
	A1	+ (0	f_{x}															~
1	A	B C	D	E	F	G	Н	1	J	K	L	M	N	0	Р	Q	R	S
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			-															

Empty Excel file

Note that you should have a menu entry called 'Principal Toolbox' and two Principal Toolbox toolbars:

The Principal Toolbox Report & Template Toolbar

This toolbar provides functions related to reporting. It offers to insert either a Pivot table or a chart based on the Principal Toolbox data. For more information, see <u>creating a chart</u> and <u>creating a Pivot table</u> and <u>creating a chart</u> based on Principal Toolbox data.

The Principal Toolbox Template Toolbar

This toolbar provides functions related to setting up a template. The keywords that relate to the Principal Toolbox data can be referenced, inserted and the data refreshed.

File	Home	Insert	Page Layout	Formulas	Data	Review	View	Add-Ins	Acrobat
Contri	bute *	Ct Op	en In Contribute	<u>ने</u> Publish To	Website	👮 Post To E	log		
Princip	oal Toolbox 🔻	Princip	al Toolbox Report	: 祖 Insert Ch	nart Based	l on PT Data	Insert F	vivot Table Ba	sed on PT Data 🗊 🎼 🗐
		Princip	al Toolbox Templa	ite: 📴 Show	/ Hide Key	rwords 😰 R	efresh PT D	ata 🍞 Ope	en Keyword List Save as PT Merge Template
Menu O	Commands					Custo	m Toolbars		

4.1.2.2.2 Inserting Principal Toolbox Keywords

Keywords are used to define which data will be imported from Principal Toolbox into your report. These keywords are provided in a context-sensitive list, the keyword reference. This list can be opened from within your Excel template. Click the 'Merge Keywords' button on the template toolbar to open a browser window with the available keywords for this template.

A page like the one below should appear. Note that the content of the page may differ per project / programme.

Note: if the report is to be used on different locations within the application, make sure to only use generally available keywords. This is mainly the case with the availability of views.

Principal Toolbox® (Principal) - Windows Internet Explorer provided by	Principal Toolbox		- O X
Kttp://asp.fortes.nl/Principal	/jsp/Reports/MergeFields.jsp?PageID=1226	38&SetReturnAdrs=false&PopupSil	bling=true	
Keyword List Lookup the available fields Paste the keyword in your r	and views and click the link to copy the key nerge template at the appropriate location.	word to the clipboard.		Close
Project fields				
Baseline	Capacity planning	Costs	Costs	
Current Baseline Final Current Baseline Start Initial Baseline Final Initial Baseline Set Initial Baseline Set	IT Capaciteit (Custom28) PM Capaciteit (Custom29)	Budget (Custom11) Costs Actual Costs Actual Cumulative Costs Budget Costs Budget Cumulative Costs Committed Costs Committed Cumulative Costs Fac Costs Forecast Costs Planned Costs Remaining Costs Remaining Costs Remaining Costs Remaining Costs Remaining Costs Remaining Costs Reserved Costs Status Costs Variance Costs Variance Cumulative	EAC (Custom14) ETC (Custom13)	
Costs Tolerance	Finance	Hours	Hours Tolerance	
Costs Active Stage Only Costs Orange (%) Costs Orange (Abs) Costs Red (%) Costs Red (Abs)	Total Actuals (Custom32) Total Budget (Custom35) Total Forecast (project) (Custom34) Total Reserved (Custom36)	Hours Actual Hours Actual Cumulative Hours Budget Cumulative Hours Committed Hours Committed Cumulative Hours Remaining Hours Remaining Cumulative Hours Status Hours Variance Hours Variance	Hours Active Stage Only Hours Orange (%) Hours Orange (Abs) Hours Red (%) Hours Red (Abs)	

Keyword list

Click a keyword to copy the information to your clipboard. Then select the appropriate location in the Excel template where you want to place the related data. To get the keyword in the template, choose **Paste** in the **Edit** menu. Alternatively use the shortcut key **CTRL+V**.

For example, when clicking the **'name'** keyword, the keyword can be inserted in the Excel file on location B2. Note that when inserting the keyword, the keyword is replaced with the actual data

immediately. During this process, a dialog appears showing the progress of the operation.

Now, insert a view (table of date) in the template by selecting a keyword related to views. In the example below, the view on open issues is inserted.

	19-(- 1	e 🛕 🖛	-		-	MS	ExcelClient (15) [Comp	atibility Mode] - Microsoft Ex	cel						3 X
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Pri	ncipal Too	olbox - I	Principal Toolbo	ox Report:	Insert Charl	Based or	PT Data	Insert Pivot	Table Based	I on PT Data 🔯 🏥 🗐							
			Principal Toolbo	ox Template	:: 🧱 Show / H	ide Keywo	rds 😰 Refi	esh PT Data	🖓 = Open H	(eyword List Save as PT Merge	Template						
Mer	nu Comma	ands					Custom	Toolbars									
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4	А	В	С	D	E	F	G	Н	- I	J	K	L	М	N	0	P	Q
1																	
3		Quality a	and Organisati	ion project	ts												
4			Issues (A	ll Issues)}	-												
5		Priority	Status	11	Description [Documer	t Type	Decision	Owner Esile Aall	Product / Plan item	Due Date	Remarks					
7		Normal	Closed		9		5 N	Open	Gerard N	le Project Initiation Docume	ent						
8		Low	Open	8	8 Slow Interr) Issue	Open	Samuel I	DaPilot Preparation (Work F	23-4-2010	Contact IT	to find out	why			
9		Critical	Open	7	7 Bug found		0 Off-spec	Assigned	John Edv	va Pilot Preparation (Work F	P 1-4-2010) Try to rep	roduce the (error to find	the bug		
10		High	Open		6 Delay in sy		0 Concern	Deferred	Jeroen va	an Barneveld	17-6-2010	Maybe we	should adj	ust the pla	nning		
11		High	Open	:	5 Request to 1 Different no		1 REC	Approved No Action	Yung Ji-L Samuel I	a Pilot Preparation (Work F	30-4-2010	LOOK for n	ew design				
13		Low	Open		3 Request fo		0 RFC	Resolved	Richard I	HaRequirements report	28-5-2010	, Acquired :	all the mate	rial			
14		Critical	Open	2	2 Request fo		0 RFC	Investigati	Samuel I	Davies	19-4-2010) '					
15		Normal	Open	1	1 test issue		0		Gerard N	le Highlight Reports							
16		Normal	Open	1	1 test 1 The PID de) Concorr	Investigati	Gerard N Gerard N	le Project Initiation Docume	ent 31-12-200/						=
18		riigii	Closed		THEFID at		Concern	investigati	Geraru w	re Project mitiation Docume	91 31-12-2004	•					
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Inserting a keyword

Again, the keyword is immediately replaced with the data. You are now able to change the format of the table appropriately. E.g., make the column heading bold and have adapted width of the columns.

X 🚽 🤊 •	(* - L) (B)		-	MSExcelClient (15)	[Compatibility	/lode] - Mi	crosoft Excel			- 0 X
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A	В	С	D	E	F	G	Н	I.	J	K
1 Pro	gram	me ls	ssue	Log						
3 Name	Quality ar	d Organis	ation project	S						
5 Issue Lo	g Priority	Status	Nr	Description	Documer	Туре	Decision	Owner	Product / Plan item	Due Date
6	Low	Open	8	Slow Internet connection	0	Issue	Open	Samuel Davies	Pilot Preparation (Work Package) 23-4-2010
7	Critical	Open	7	Bug found in version 7	0	Off-spec	Assigned	John Edwards	Pilot Preparation (Work Package) 1-4-2010
8	High	Open	6	Delay in system development	0	Concern	Deferred	Jeroen van Barneveld		17-6-2010
9	High	Open	5	Request for change of the page layout	1	RFC	Approved	Yung Ji-Lao	Pilot Preparation (Work Package) 30-4-2010
10	High	Open	4	Different page layout	0	RFC	No Action	Samuel Davies	Updated user documentation	1-4-2010
11	Low	Open	3	Request for more background material	0	RFC	Resolved	Richard Hammond	Requirements report	28-5-2010
12	Critical	Open	2	Request for roll-out on Macintosh machines	0	RFC	Investigation	Samuel Davies		19-4-2010
13	Normal	Open	1	test issue	0			Gerard Mesen	Highlight Reports	
14	Normal	Open	1	test	0			Gerard Mesen	Project Initiation Document	
15	High	Closed	1	The PID does not include a proper risk analys	is C	Concern	Investigation	Gerard Mesen	Project Initiation Document	31-12-2004
16										
1/										
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19					_					
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21										
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Formatting the table

In the example above, the table has been adjusted and additional information inserted (labels, report title etc.). If necessary, the data can be refreshed by clicking the [Refresh PT Data] button on the template toolbar.

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4.1.2.2.3 Creating a Chart Based on Principal Toolbox Data

To create (or insert) a chart based on Principal Toolbox data, it is required that the data has already been inserted through a keyword, see 'Inserting Principal Toolbox Keywords [134]'.

Next, click the 'Insert Chart Based on PT Data' button on the report toolbar.

💶 Open In Contribute 📠 Publish To We	ebsite 🖻 Post To Blog
Principal Toolbox Report 🛄 Insert Chart	Based on PT Data 📓 Insert Pivot Table Based on PT Data 🔯 💼 🗐
Principal Toolbox Template: 🔛 Show / Hi	ide Keywords 😰 Refresh PT Data 🛛 🖓 🖬 Open Keyword List Save as PT Merge Template
	Custom Toolbars

A dialog as shown below should appear. In this dialog, select the data that should be used as the source for the chart and the location where the chart will be related to (if not placed on a new sheet if chosen).

Insert chart based on Principal	Toolbox data
	Principal Toolbox
Insert a chart based on Principa keyword. Define the source for existing sheet.	al Toolbox data indicated by the inserted Principal toolbox the chart, whether or not the chart is to be placed on an
Principal Toolbox keyword:	Issues (All Issues) on 'Report'
Chart location:	'Report'!\$E\$20 _
The chart will be dynamically lin is updated, the chart will adjust	ked to the Principal Toolbox data. When the report data likewise.
More help	
	OK Cancel

To alter the chart location, click the [_] button (behind chart location) and select the location. This is mainly useful for showing the chart on a sheet different from the source data.

The selection for Principal Toolbox data will show all available data inserted by keywords in the template. Please note that the selected data is automatically interpreted by Excel to be applied in the chart. This works best for data that is organised as a 'label column', followed by chart data columns, see the example below.

To insert the chart, click **OK**. When inserting normally (on an existing sheet), the following should appear (as an example).

🗶 🛃 🤭 · (* ·	- 102 14	MSExcel	Client (15) [Cor	npatibility Mode]	- Microsoft Excel		Chart Too	ls					- 0	x
File Home	Insert Pag	e Layout Formu	ulas Data	Review Vi	ew Add-Ins	Acrobat D	esign Layout	Format				4	, 🕜 🗆 é	F X
Ct Open In Contril Principal Toolbox R Principal Toolbox T	bute 🙀 Publish To teport: 📶 Insert Ch emplate: 🐖 Show /	Website 💼 Post T art Based on PT Dat / Hide Keywords 😰 Cu	o Blog ta 🏦 Insert Pivo Refresh PT Data stom Toolbars	ot Table Based on a ∵∀= Open Keyw	PT Data 📄 👘 🗐 rord List Save as PT N	/lerge Template								
Chart 1	- (°	f_{x}												~
A	B C	D	E	F	G	Н	1	J	K	L	М	N	0	
1														
2		Name	Costs Status	Cost Budget	Costs Committed	Costs Actual	Costs Remainin	g Cost Variance						
4		Venus Project	Red	4000	0	9860		2860						
5		Apollos Project	Green	36110	3200	19084		2 -13824						
6		Juno Project	Green	5000	200	4000		-800						
/ 。		Zeus Project	Green	10000	1000	7000		-2000						
9														
10		10-			5333				10					
11		40000												
12														_
13		30000							_					
14		-							-					
16		20000		_				Cost Budget						
17								Costs Committed						_
18		10000						Costs Actual	-					
19		10000					-	COSts Actual	-					
20								Costs Remaining	-					
27			Red	Green	Green		Green	Cost Variance						
23			Red	Green	Green		Green							
24		-10000	enus Project	Apollos Proje	ct Juno Proj	ect Zei	us Project							
25														
26		-20000												
28					9999									+
29														L
30														
31 ∢ ∢ ▶ ▶ Repor	rt Data 😤	, I						14						► II
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				_		_								

Inserting a Chart

The same chart would appear on a new sheet when this was selected. Please note that the chart type is by default set to 'stacked columns'. The user has to tune the chart by normal Excel functionality.

4.1.2.2.4 Creating a Pivot Table Based on Principal Toolbox Data

To create (or insert) a Pivot table based on Principal Toolbox data, it is required that the data has already been inserted through a keyword, see <u>Inserting Principal Toolbox Keywords</u> [134].

Next, click the 'Insert Pivot Table Based on PT Data' button on the report toolbar.

📧 Open In Contribute 尉 Publish To Website 👼 Post To <u>Blog</u>	
Principal Toolbox Report: 📶 Insert Chart Based on PT Data 🌃 Insert Pivot Table Based on PT Data	2 ib I
Principal Toolbox Template: 📴 Show / Hide Keywords 😰 Refresh PT Data 🛛 Y= Open Keyword List	Save as PT Merge Template
Custom Toolbars	

A dialog as shown below should appear. In this dialog, select the data that should be used as the source for the chart and the location where the chart will be related to (if not placed on a new sheet if chosen).

Insert Pivot table based on Princ	cipal Toolbox data
	Principal Toolbox
Insert a Pivot table based on Pri toolbox keyword. Define the sou whether or not a chart is to be a	ncipal Toolbox data indicated by the inserted Principal urce for the Pivot table, the location for the Pivot table and added.
Principal Toolbox keyword:	Issues (All Issues) on 'Data'
Pivot table location:	'Data'!\$C\$3
The Pivot table will dynamically b data is updated, the Pivot table	e linked to the Principal Toolbox data. When the report will adjust likewise.
More help	
	OK

To alter the Pivot table location, click the [_] button and select the location. The selection for Principal Toolbox data will show all available data inserted by keywords in the template. Additionally, the user can click to add a Pivot chart (connected to the Pivot table. This chart will be placed on a new sheet automatically.

To insert the Pivot table, click **OK**. The following should appear (as an example).

	1 9-0	- 🗋 🛛	à <u>(</u>] ≠	MSExcelCli	ent (17) [Compati	bility Mode] - Micro	soft Excel	PivotTab	le Tools								
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4			Venus Project	Red	4000	0	6860	0	2860				Costs Status				
5			Apollo Project	Green	36100	3200	19084	2	-13824				Costs Budgets				
7			Juno Project	Green	10000	200	4000	0	-800				Costs Committed				
8			2003110/001	Green	10000	1000	1000		-2000				Costs Actual				
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Inserting a Pivot Table

In this setup, the user is able to drag the required fields to the appropriate location in the Pivot table. In the example shown below, the Pivot table is configured such that it shows the number of issues per project and per issue type.

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		Apollo Project	Green	36100	3200	19084	2	-13824			Costs Status	
		Juno Project	Green	5000	200	4000	0	-800			Costs Budgets	
		Zeus Project	Green	10000	1000	7000	0	-2000			Costs Committed	
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			Data								Costs Remaining	
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		Venus Project	4000	6860								
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Pivot Table inserted

4.1.2.2.5 Finishing the Excel Report Template

When all the keywords have been inserted into the template and required charts and Pivot tables have been added, the template can be made available within the Principal Toolbox.

To publish the template for use of reporting, navigate to the appropriate location in Principal Toolbox. For example, if you would like to use the report on a programme, navigate to that specific programme dashboard to add the template.

Tip: If you add the template in a model (either a project model or an MSP programme model), the report becomes available automatically on the projects / MSP programmes that are created based on the model.

At the appropriate location, access the automated report list ([Edit] button on the list of available automated reports). See also creating an Excel report template [132].

To upload the merge template in the Principal Toolbox, click Add in the Templates header (in the Edit Automated Reports window). Fill in the following information:

Description Revision/Doc nr. Filename Internal document link	:	This will be the title of the report shown on the dashboard Use this to give a version number to your template Locate the XLS-file with the browse button Provide a document ID from a document at another location in the Principal Toolbox application. The ID can be found in the document history.
		This allows for a centrally placed document to be linked to from projects. Update by updating only the original centrally placed

IMPORTANT: Make sure the checkbox 'Document is a merge template' is ticked!

document.

Add a document to	the list	Download Template	Keyword List
Select a merge template on any document but mus contains the necessary m	or normal document / link to upload. Please note that st be saved in the RTF format. Excel merge templates acro's: Click on the 'Download Template' button to do	Word merge templates must be based on a te wnload the template.	can be based mplate which
For a list of keywords, clic	k on the 'Keyword List' button.		
Add a document/link			
Description:	[
Revision/Doc Nr.:			
Filename:	Browse (rtf,xlt,xltm,xls,xlsm	n,rptdesign)	
Merge Template:	Add this document as a merge template		
Uniternet autress.			
Internal Document Link:	Provide a document ID from location in this application. The the document history.	a document at another his ID can be found in	
OK Cancel			

Adding a Excel Report Template

Click '**OK**' to add the merge template to the Principal Toolbox. The document has now been made available as an Automated Report and it can be found on the dashboard in the list Automated Reports.

To generate the Automated Report click the template name and it will open in a new window. After completion, the template can be used as a report within the project / programme etc. See <u>using the</u> <u>Excel report</u> [13].

4.1.2.3 Advanced Topics

Configuring the template may require advanced options like formatting the table conditionally, add calculated data to the original Principal Toolbox data or add custom calculations / processing.

The Excel client reporting allows you to add this kind of configuration to the automated report templates. For these topics it is assumed that the user is familiar with the options and functionality provided by Excel.

4.1.2.3.1 Extending the Report Data

Extending report data allows you to add information to the report data retrieved from the Principal Toolbox. For instance, adding a calculated column to a table. This can be useful when data has to be presented different than the default formatting or if the data needs to be post-processed.

The report extension is standard Excel functionality and can be applied as is on single cell data (like the budget field of a project). However, for tables of data based on views in the Principal Toolbox, it is more complex. The data coming from Principal Toolbox have a dynamic behaviour. The number of rows may change in time and / or the location at which the report is used. This behaviour makes extending the report data (and other advanced options) a bit complex as it has to be configured in such a manner that it works independently from the number of rows in the table.

To explain the proper way of configuring extended report data, consider the following example. Here, the impact of a risk is to be determined based on the Principal Toolbox fields 'Chance' and 'Severity'. The impact is to be determined by the impact matrix stated below.

Chance	Small	Medium	High
Severity			-
Small	1	2	5
Medium	2	4	10
High	5	10	25

In the table, the impact is stated as a value between 1 and 25. The objective is now to add this impact as a column to the report data.

To start, it assumes that an appropriate view is created in the Principal Toolbox and is available as a

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1														
2		Nr	{Risks (Risk Impact)}	Status	Chance	Severity	Priority							
4			3 Stormy weather in Carribean	Open	Normal	High	Critical							
5			2 Technical failure of pumping	Open	High	Medium	High							
6			1 Technical problems	Open	Normal	High	Critical							
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keyword for use in the Excel template. As a result, a template as shown below could be created.

Extending the report data

To add the calculated impact data, a column heading is added next to the 'Priority' column. Also, in the cell below this heading, the following formula is entered:

=IF(F5="Small";IF(G5="Small";1;IF(G5="Medium";2;5));IF(F5="Medium";IF (G5="Small";2;IF(G5="Medium";4;10));IF(G5="Small";5;IF (G5="Medium";10;25))))

(adapt the formula as necessary to refer to the correct cells!)

This formula calculates the impact based on the values detected for 'Chance' and 'Severity'. Next, extend the formula to be applied to all rows and **the first empty row below the table of data.** See the picture below.

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4			3 Stormy weather in Carribean	Open	Normal	High	Critical	10						
5			2 Technical failure of pumping	Open	High	Medium	High	25						
6			1 Technical problems	Open	Normal	High	Critical	25						
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Report data extended

The row below the data is considered to be a 'store' of the formulas and formatting to be applied to the table. When refreshing the data, the formula(s) in the first empty row below the table of data will be used for all rows (independent of whether there are more or less rows of data).

When the extended data is placed adjacent to the table of data from the keyword itself, the extended data can also be used for Pivot tables and charts, see the appropriate help pages for more information.

4.1.2.3.2 Apply Conditional Formatting

Conditional formatting allows to alter the visualisation of data depending on value conditions of the data. For example, when the data represents a number and the number is above a certain level, the colouring of the data may turn red.

The conditional formatting is standard Excel functionality and can be applied as is on single cell data (like the status field of a project). However, for tables of data based on views in the Principal Toolbox, it is more complex. The data in the Excel client reports, as provided by the Principal Toolbox, has a dynamic behaviour. The number of rows of data may change in time and / or the location at which the report is used. This behaviour makes the conditional formatting (and other advanced options) a bit complex as it has to be configured such that it works independently from the number of rows in the table.

To explain the proper way of configuring conditional formatting using the Excel reporting functionality, consider the example as given in the topic regarding <u>extending the report data</u> [140].

Now, we will add formatting to the rows that have an impact that is greater than equal to 10. If so, the text in the row will turn red.

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	А	В	С	D	E	F	G	Н		J	K	L	М	
1 2 3 4 5 6		Nr	Description 3 Stormy weather in Carribean 2 Technical failure of pumping 1 Technical problems	Status Open Open Open	Chance Normal High Normal	Severity High Medium High	Priority Critical High Critical	Impact 10 25 25						
7 8 9 10 11				Edit Fo	rmatting Rul a Rule Type:	e		25	? ×					
12 13 14 15				Format all cells based on their values Format only cells that contain Format only top or bottom ranked values Format only up or bottom ranked values										
16 17 18 19				► Fi	Format only unique or duplicate values Use a formula to determine which cells to format									
20 21 22 23				For =IF	Format values where this formula is true: =IF(\$H7>=10;TRUE;FALSE)									
24 25 26 27 28	N P		nen / • 1 /	Pre	view:	AaBb	oCcYyZz		_ormat					↓ □
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Apply conditional Formatting

In the picture above, the row below the data is selected to apply the conditional formatting to. Note that this row is considered the 'store' for formatting and calculations to be applied to the table data.

For this row, the conditional formatting is set. The formatting is set as a formula to apply the formatting to the entire row depending on a single cell value (instead of applying the formatting to a single cell depending on that same cell). The formula entered is:

=IF(\$H7>=10;TRUE;FALSE)

(adapt the formula as necessary to refer to the correct cell!)

The cell H7 refers to the impact value for the selected row. The formatting is set to red text. When the data is now refreshed (click [Refresh PT Data] on template toolbar), the formatting is applied to all the table data as well, see below.

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1 2 3		Nr	Description	Status	Chance	Severity	Priority	Impact						
4			3 Stormy weather in Carribean	Open	Normal	High	Critical		10					
5			2 Technical failure of pumping	Open	High	Medium	High		25					
6			1 Technical problems	Open	Normal	High	Critical		25					_
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Conditional formatting applied

4.2 Timeline reporting

A timeline is a graphical representation of information in relation to time. Timeline reports enable you to instantly report on different types of cost or hour entries over time. Timeline reports can be used to compare your available resource capacity with you requested and allocated resource availability. It can also be used to compare the budget and actual costs within a project.

Timeline reports work like pivot-table known from MS Excel. It creates reports on entries coming from time registration, cost entries and resource management.



Example: Timeline Report

Based on the start and end date of an entry a timeline report creates an overview in time, for instance the total costs per month per project or the number of hours resources are allocated to projects.

The timeline reports can be found on the same location as the normal reports. So they are available enterprise-, programme-, portfolio- and project level. They are also available in the different modules
like time registration and resource management.

Reports
Programmes / Project lists
Projects
Products / Plan Items
Issues
Risks
Changes
Quality reviews
Actions
Lessons learned
Cost / Hour Entries
Benefits
Performance Indicators
System Resources
Project Resources
Entries
Timeline Reports Entries

Two representation types are available:

- table
- chart

Timeline report views can be used in automated Excel and Word reports.



Example: Timeline Report Chart

Timeline R	eports							Close	ð
Entries			G di	XI	C	ustom view	· · · · ·	View Options	-
Туре	No Date	Jan (10)	Feb (10)	Mar (10)		Apr (10)	May (10)	Jun (10)	Ju
Actual		220.00	100.00	60	5.00	816.00	119.00	448.00	
Allocation				7	5.60	551.40	240.00	88.00)
Assigned		372.00	473.25	94	6.00	998.00	845.75	982.75	,
Available				26	8.80	2,068.48	2,041.00	1,600.00)
Capacity		611.49	582.38	66	9.73	640.61	611.49	640.61	
Committed						4.00	10.00		
Planned	7,752.00			69	2.58	761.66	893.16	1,006.35	;
Request				13	8.40	749.60	780.20	418.80	1
Reserved	600.00					-66.67	-175.00	-183.33	
•		III							Þ

Example: Timeline Report Table

The different options in the View options menu are:

Basic Setting	:	To configure the timeline report view	View Options
Oet mers	•	the shown items	Basic Settings
Set widths	:	Set the column width, so the view fits better on screen or in a MS Word report. Drag the line between columns to increase or decrease the column size.	Set Filter Set Widths Make Default Save View Manage Views
Make default	:	This sets a view to the personal default	
Save view	:	Save the view for later use.	
Manage views	:	Set properties for the view. You find more information at ' <u>Manage views</u>	

Create a Timeline report view

This example describes how to create a table with costs per product per month for this year within a project represented as a timeline report.

Basic Settings

- 1. Navigate to your project in Principal Toolbox and go to the 'Report' tab
- 2. Click on 'entries' in the Timeline report section
- 3. Open 'view options' and choose 'Basic Settings'
- 4. Set the values for the settings
 - a. unit : select '**Money** (changes on book date)'. This setting is used to select which kind of entries (costs or hours) you want to see and in which unit it is represented on screen. The system automatically calculates the data between different unit settings.
 - b. Scale: set scale to weeks to show the costs per week.
 - c. Start date: set a dynamic or fixed start date where the windows of the timeline must start. Select '**This year**' as a dynamic start date.
 - d. Horizon: set the number of weeks, months or quarters to show starting at the start date.

Unit:	Hours (changes are distributed over Working Days)	Ŧ
Conversion:		Ŧ
Scale:	Months	Ŧ
Startdate:	Opnamic Last month ▼	
Show entries without bookdate (additional column):	V	
Show values as cumulatives		
Initial value for cumulatives	zero (0) 👻	
Horizon:	12 Months	
Show as Pivoted table in Excel		

5. Apply a filter on entries: select '**Budget**' and '**Actual**' in the filter type. This will give you only the cost-entries of the type budget and actual.

Apply filter on entries		
Create Date No filter		
○Create Date	Before Today	
○Create Date	Equals (= Value)	
Is draft	No 💌	
Type No filter Selection	Actual Allocation Assigned Available Budget Capacity Committed Demand EAC ETC	
	Exclude selected items	

6. Select 'Table' as the representation type to get a table with the budget and actual costs

Timeline representation Representation: OTable Chart		
Table configuration		
Available fields EntryCustomBool2 EntryCustomBool2 EntryCustomDate1 EntryCustomDouble1 EntryCustomDouble2 EntryCustomInt1 EntryCustomInt2 EntryCustomRef1 EntryCustomRef2	Selected fields Type	Up Down

- 7. Table configuration select the field to show per row. Select product and type to display the product name in the type of entry (budget or actual).
- 8. Click 'OK' and see the result on screen

Save view

If you want to save the newly defined view you need to save it with **Save view**. To overwrite an existing view you saved before, select the name of this view at the Existing view pull down list. To create a new view, enter the new name at 'New view'. Click **Save** to save the view.

Principal Toolbox® ((Principal) - Windows Internet Explorer provided by Princ							
🗮 http://asp. fortes.nl /	Principal/online/Listing/functions/SaveView.jsp?ListID=TLEntriesReports_100							
Save view								
Save the configure whether the view s everyone on this lo	Save the configured view. Provide a new name or save the view as an existing view. Indicate whether the view should be defined personal (only to be used by you), local (to be used by everyone on this location) or global (to be used by everyone everywhere).							
Select existing view	<i>i</i> to overwrite or save as new view.							
Existing View:	new view							
View name:								
Туре:	Local Personal							
OK Cancel	Local Global							
ave view								

Select personal, local or global. See manage views 23 for more information.

- With the 'Make default' option a specific view can be set to the personal default view on that page.

- With the button 'Manage views' the views available can be managed. See Managing views 23.

4.3 Widgets

Widgets can present data directly, without having to run a report or opening a view. Widgets are easy to configure and refresh the data automatically. Widgets can be used for reports, but can also support specific processes and can be developed specifically for customers.

Dashboard	Properties -	Financials	Portfolio Gantt	Documents	Archive										
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Risks Quality revie Changes	ws						4 Internal								
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Timeline R	leports			60	%		-2	2 0	2 6 6		0				
Entries			Total Count p	rojects: 5					Market	- *	12020	20202020202020202020202020202020202020	101201201201A		

Widgets on a portfolio dashboard

Widgets are available on several places in the Principal Toolbox. They will not be displayed automatically.

Enable widgets:

- 1. Click on Edit Widgets to make widgets available on your screen.
- 2. Use the ' \checkmark ' to display the widgets.
- 3. Select the number of widgets that should be displayed.
- 4. Select the type and confirm with **Ok**.

Edit Widget Layout							
Choose whether to show	w widgets and applicable widget layout.						
Show widgets	V						
Widget layout	◎ 1 0 1 2	<u>•</u> 1 2 3					
Widget column 1	Pie Chart	-					
Widget column 2	Bubble Chart (Projects)	T					
Widget column 3	Bar Chart	—					
Ok Cancel							

Edit the widget lay-out

Widgets will now be displayed on the page.

4.3.1 Widget Configuration

The displayed widgets can be configured/modified. Click on **Configure** to edit the widget. The configuration possibilities depend on the type of widget. The different types of widgets with their configuration options are explained below.

Bar chart:

- 1. Name: name of the widget.
- 2. Values: count projects or specify field.
- 3. Group by: specify field.
- 4. Show: values or percentages.

Configure v	vidget ×	
Name:	Projects Bar Chart	
Values:	Count projects Sum of field Hours Actual	
Group by:	Status	
Show:	Values Percentage	
	Ok Cancel	-

Bubble chart:

- 1. Name: name of the widget.
- 2. X-axis: information on this axis.
- 3. Y-axis: information on this axis.
- 4. Size: information that determines size of the bubble.
- 5. Colour: random or i.e. project field 'Status'.

Name:	Bubble Chart (Projects)
X-Axis:	Risicoinschatting
Y-Axis:	Verwachte investering
Size:	Costs Budget
Colour:	 Random colour Project field: Costs Status

Pie chart:

- 1. Name: name of the widget.
- 2. Values: number of projects or specify field.
- 3. Group by: specify field.
- 4. Combine slices (<): combine below certain percentage.
- 5. Show: what should the widget display.

Configure widget					×
Name:	Projects Per Bu	ucket	1		
Values:	Count projection Sum of field	ts Geschatte opbrengst		•	
Group by:	Туре	•			
Combine slices (<):	0%				
Show:	✓ Label Percentage Values		Total		
			(Ok	Cancel

Timeline chart:

1. Name: name of the widget.

- 2. Type: line-, cumulative line- or bar chart.
- 3. Show: costs and/or hours.
- 4. Legend: on/off.
- 5. Scale: weeks, months, quarters or years.
- 6. Start date: dynamic or fixed.
- 7. Horizon: in months.
- 8. Type: which data should be displayed.

Name:	Timeline			
Type of chart:	Bar Cumulative			
Show:	Costs			
I a second	Hours			
Legena:	on ⊚om			
Scale:	Maanden			
	Oynamic	THis year		1
Start date:	 Fixed date 	01-01-2012		
Horizon:	12 Maanden			
	Selected:		Available:	
	Actual	< Toevoegen	Allocation	
Туре:	Forecast	Vorwiidoron >	Committed	
		verwijderen -	Estimate	
			Planned	
			Planned	

Filter

On Widgets with the type 'bar chart' or 'pie chart' it is also possible to apply a filter. With a filter it is possible to display specific data in the widget (drill-down).

- 1. Click on **Filter** to apply a filter.
- 2. Click on Add filter to add a new filter.
- 3. Click on the 'X' to remove a filter.
- 4. Click on **Ok** to confirm changes.

Archived	▼ No	•	×
Saved	▼ No	•	×
+ Add filter			

Add filters to a widget

4.3.2 **Project Specific Widgets**

On the project level of the Principal Toolbox two other widgets can also be displayed. These are the 'risk matrix' and 'burn-down widget'. Both can be displayed on the 'Report' tab of a project.

Risk matrix:

The risk matrix displays all risks in and overview based on chance and severity. The risk matrix cannot be configured.



Risk Matrix

Burn-down widget:

The burn-down (or burn-up) widget displays the planned and actual hours together with the ideal and current trend line. De burn-down widget can be configured. Click on Configure and fill in the following information:

Burn-down chart:

- 1. Name of the widget.
- 2. Type of graph: burn-down or burn-up.
- 3. Show series: which data should be shown.
- 4. Start date: project start date or fixed.
- 5. Horizon: Project end date or fixed.



Configuration of a burn-down chart

Burn-down chart

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5 Advanced options

5.1 Advanced Customisation & Workflow (add-on)

With the add-on 'Advanced Customization & Workflow' an organisation can define electronic forms in the different project models. These pages can be tailored to the specific needs of the organisation or programme.

- 1. Go to a project model and create a new product to customize or select an existing product.
- 2. Click the product to open the product details page.
- 3. Click the button Page Layout T to define the layout of the page.

Default layout	:	Standard Principal Toolbox view;
Custom layout	•	To choose which helds are visible on the product page.
Custom layout with approval	:	To customise and define an approval for the page.

roduct: Project	Initiation Document (PID)	Edit	Change Picture	Close	Page Layout 🔻	Approval Settings	Edit Widgets	\mathbf{M}
Name:	Project Initiation Document (PID)				Planned date	Actual date		
Owner Group: Owner: Reviewer: Participants: Priority: Mandatory:	nicioles project pan Project Manager 		Start: Draft: Checked: Final: Duration: Planning Status	 8:	 0.00			
Product Quality:	-							
Finance								
Total Actuals:	0.00							
Helpful Text: Purpose of the Project basis for the project co means the PID also pi Board and Project Ma eye on feasibility. The the project.	I initiation Document is to define the project and creat ontrol and determination of success of the project. Th ays a role <i>during</i> the project. It is a baseline for Proje anger to gauge progress, evaluate changes and kee PID answers the what, why, who, how and when o	ate a his ect p an of						

4. In this example a new page with an approval cycle is defined. Place a tick in front of 'Custom layout with approval'.

Enable product approval:	V					
Approvers can be selected from:	 All project mer Persons define 	mbers ed in field:	Owner		Ŧ	
On approval set field:	Final	•	to	Approved		

- 5. Next step is to define which fields need to be available on the page. In the first pull-down menu select if the field is a <u>project</u> field (e.g. project name) or a <u>product</u> field. Then select the field to show on this custom product page.
- 6. The last action on the page is to select what field will be set when all the reviewers approve the data on the product. In the example given, a custom product field (product approval) is used to set on approval.
- 7. When this project model is used for a project, the project manager (or the owner) inserts data on the

button.

product and then requests approval for the product by clicking the Request Approval

8. A new window will open where the approvers need to be selected, a due date can be set and remarks can be inserted. To send an email to the approver(s) about this product approval, tick **'Notify approvers**'.

oprovers:	Selected Approvers:	Available Approvers:	
		Erik Aalbersberg	
		>>>	
ue date:			
lemarks:			
lotify approve	rs: [

9. The approver(s) will be informed through an email and will have a note on their 'Home' page.

Documents to be appro	ved by me		
Document	Location	Project	Due Date 🌲
Hoofdpuntenrapport.rtf	Highlight Reports	Apollo Project	04-May-2010
Highlight_Report.rtf	Highlight Report	Apollo Project	24-Aug-2010

10.To review the product page click the product name and the specific 'Product' page opens.

General	Logs	Dependencies	Costs & Hours	Resource Demand							
Produ	ct: Pr	oject Initiati	e Document	(PID)		Close	Approve	Reject	Approval Status	Edit Widgets	\boxtimes
Name: Descrip Owner Owner: Review Particin	otion: Group: ver: pants:	Pi	roject Initiatie Docu roject Manager	ment (PID)	-	Start: Draft: Checked: Final:	Pla dat	unned te 	Actual date 		
Priority	<i>r</i> :				Du	iration:		0.00			
Manda	tory:	-			Pla	anning Statu	s:				
Produc	t Quali:	ty:									
Finance Total A	ctuals:		0.00								

Approve or disapprove the product

- 11.After review click 'Approve' or 'Disapprove' and insert any remarks.
- 12.In this example we have approved the product and the status of the 'Product approved' field is automatically set to '**Approved**'.

6 System Administrator: Setup & Settings

The administrator can simply control the Principal Toolbox via the 'Configuration page' and the 'Settings page'. In order to access the 'Configuration page' you need to click **Setup** in the dark blue header of the Principal Toolbox application and select **Configuration**. To access the 'Settings page' you need to click **Setup** in the dark blue header of the Principal Toolbox and select **Setup**. These functions are initially only available to users with administrator rights.

nome Policio Maragement Organisaton Posotice Alecateri Time Entry Import / Expert	time + (help (supper) (supper) (supper) (supper) + none (resource subscript supper) + none (resource subscript + (help (supper) + none)) + (help (su	() Seinb +
Configuration	Settings	
Option Image Image © Provide totation Image Image	Option Image: Control of the second sec	

Setup page

Settings page

On the Configuration page you can find several configuration options, such as non-project activities and custom fields. In the middle of the 'Configuration page' you can see the information of your current license. Underneath are options to alter the license key and the version type.

6.1 Setup

On the Configuration page you can find several configuration options, such as non-project activities and custom fields. On the left hand side of the page you see a list with subjects that point to the different setup pages.

We will review the most important subjects in this section:

- Principal Toolbox settings 155
- Email notification 155
- Creating non-product activity sets 155
- Defining custom fields 159

6.1.1 Principal Toolbox

Note: this section is only relevant to system administrators.

This is an overview of the advanced system settings. Normally spoken these do not need to be changed. Some of these settings will only be shown when add-on's are activated.

Page	Link	Setting	Standard value	Remarks
Principal Tool	box			
		Only expand active and next stage	No	
		Activate product selector in logs	Yes	
		Use of PRINCE2 [™] roles	No	If the full PRINCE2 organisation is used within the organisation, select 'Yes'.
	MS Project file export	As soon as possible constraint	As soon as possible	If progress of project is to be monitored in MS Project change this to ' Yes '
		Must finish on constraint	Must finish on	To change to a NL version of MS Project: " Moet eindigen op "
		Must start on constraint	Must start on	To change to a NL version of MS Project " Moet starten op "
MS Project in	tegration (add-on)			
		Edit project progress in	Principal Toolbox	If progress of project is to be monitored in MS Project change this to 'Microsoft Project'
	Add-in installer	Show installer step	Yes	Should the installer step be shown? If not, change to ${}^{\!\!\!\!\!\!\!\!\!No'}$
		Show download option	Yes	Should the add-in installer download step be shown? If not, change to ${}^{\prime}\textbf{No}{}^{\prime}$
		Customer installer instruction text		Needs to be changed when a specific customer instruction is needed here.
Time entry (a	dd-on)			
	Manage time sheets			Click ' New ' to create new time sheets or select a specific timesheet and click ' Remove ' to delete.
Cost entry (ac	ld-on)			
	Manage cost entries			Select a Cost entry and click ' Remove ' to delete cost entries which are not approved.

6.1.2 Email notification

Email notification on log items, time sheets, approvals etc. sends an email automatically when something becomes overdue.

Most of the notification are turned off by default.

Modify e-mail notification settings

- 1. Go to Setup > Configuration > Notifications
- 1. Click on Edit to modify the notification settings

Notification Settings		Edit
Name 🔶	Description	Value
Approval Deadline Overdue	Notify the approver of a passed approval deadline.	
Action Deadline Overdue	Notify the action owner in case of an overdue deadline.	
Time sheet Deadline Overdue	Notify the owner of a time sheet of an overdue deadline.	

Email notification settings

6.1.3 Creating non-project activities

Specify non-project activity sets for activities that are done outside projects. This can be productive hours, like service management, meetings, general, etc. You can also add a category for non-

productive hours, like sickness, holidays, special leave etc.

Different sets can be defined if different departments use different categories or have different nonproject activities. It is also possible to have multiple non-project activity sets active for one group. So you could define one set for the entire organisation (e.g. with the categories sickness, leave), and a separate set for each department with department specific activities.

Creating non-project activity sets

- 1. In the dark blue bar in the top, click 'Setup' and navigate to 'Configuration'.
- 2. On the left side of the screen you will find 'Configuration', click 'Manage Non-project Activity Sets'.
- 3. Click on New in the section 'Non-project activity sets' to create a Non-project Activity Set.

ie Portfolio Management Orga	isation R	esource Allocation Time Entry	Import / Export						Đ	ik Aalbersberg 🔻 He	lp Support Setu
oniguration											
Options ++	M	lanage Non-project Activity Set	ts								
Principal Toolbox	N	Ion-project Activity Sets				_ [New	Remove	* All No	on-Project Activity St 👻	View Options -
MS Project integration	N	ame 🌲	Objective	Hours Budget	H	ours ctual	Budget	Costs Actual			
Conversions	N	iet-Project Activiteiten			.00	0.0	0 0	00	0.00		
Manage Hour Rates	N	on-Activités du projet		(.00	0.0	0 0	00	0.00		
Currencies	N	on-Project Activities			.00	14.0	0 0	00	0.00		
Resource Categories	N	on-Projekt-Aktivitäten			.00	0.0	0 0	00	0.00		
Financial Categories											
Manage Resources											
Manage Skills											
Ime Entry											
	1										
Manage Non-project Activity Sets											
Customiza fielda											
Approval entries											
Approvarentities											

Non-project activity sets on the 'Setup' page

- 3. Then fill in the following information:
 - Name:Name of the non-project activity set.Objective:Objective of the non-project activity set.
- 4. Click OK to create the non-project activity set.

Edit Non-project Activ	ity Set
Name and Objective	
Name: Objective:	Non-Project Activities
OK Cancel	

- 5. When the non-project activity set is stored, it will appear in the listing of 'Non-project activity sets'. Now click the created set to add the non-project activities to the set.
- 6. Click Edit Categories and Activities to add categories and activities, or to change the current set-up.
- 7. In the window that has been opened, you can create new items with drag and drop.
 - a. First add a new category. Drag New category into the lower part of the window as shown below.



- b. In the pop-up, add a name for the category.
- c. Then, drag new activity into the category, as shown below.

Edit Non Projec	t Activities	Save	Cancel
Drag new categorie be placed within a c double clicking the i	s and activities to the list b category. Rename categori item.	elow. Activit ies and activ	ies are to ities by
New category	New activity		Î
New Category			

d. Give a name to the new activity.

Note: Activities can only be placed inside categories, so you'll need to define at least one category.

e. Add new categories and activities to get your set complete. Below you find an example of categories with activities.



Non-productive Leave Maintenance Incidences Other activities Education Meetings	Non-productive Leave Maintenance Incidences Other activities Education Meetings General	double clicking the it	New activity	
Leave Maintenance Incidences Other activities Education Meetings	Leave Maintenance Incidences Other activities Education Meetings General	Non-productive		
Maintenance Incidences Other activities Education Meetings	Maintenance Incidences Other activities Education Meetings General	Leave		
Incidences Other activities Education Meetings	Incidences Other activities Education Meetings General	Maintenance		
Other activities Education Meetings	O <mark>ther activities</mark> Education Meetings General	Incidences		
Education Meetings	Education Meetings General	Other activities		
Meetings	Meetings General	Education		
	General	Meetings		
General		General		

Click **Save** to save the set. Close the window to go back to the time entry pages.

6.1.4 Defining custom fields

Within organisations there often is a need to define custom fields such as, for example; project costs, SAP numbers and project codes or there is the need to have extra fields on, for example the logs, the product page or a programme level. With the Principal Toolbox you are able to define these fields.

These fields can be used for defining custom views and reports.

- 1. Go to the **Configuration** page by clicking on **Setup** and **Configuration**.
- 2. Click the link **Customize fields**. Then you select the item where you want to add a custom field. You can define custom fields on:

Action	Allocations	Benefit	Change	Cost/Hour Entry
Issue	Lessons learned	Resource	Programme/Project list/Enterprise	Projects
Resource Pool	Quality Overview	Risk	Product/ Workpackage/ Stage	Portfolios
Entry				

3. Click the specific item to define a custom field. Click **Edit** to define a custom field.

Product / Plan item: Custom4	
Edit custom field	
Available for use:	The field name should only contain einheavymatic characters, snaces end/or the following special characters: 1/() + + - 2
Name:	Custom 4
	The order number is used to sort fields (within their categories) on detail pages.
Order Number:	0
Category:	Enter a new category name:
	Or choose an existing Category:
	The abbreviated name is the used field name when categories are displayed
Abbreviated name:	Custom 4
Description:	
Visibility:	Show on property pages.
Editable:	When checked field is editable by owner else it is read-only
Width (in nivels):	sung (nee text entry, max 255 character length)
Default value	
Soldar Valde	
Advanced >>	
OK OK and New Cancel	

Defining a custom field

4. An new window will open where you need to fill in the following data:

5. There are some different field types available for the custom field. We will explain them shortly:

String	:	Text field with max. 255 characters.
Memo	:	Text field with unlimited characters.
Number	:	Number field with no decimal accuracy (for example 2342)
Double	:	Number with single decimal accuracy (for example 3,5).
Currency	:	Number with two decimal accuracy (for example 3,45).
Date	:	Date field
Checkbox	:	A basic checkbox.
Picklist (single)	:	From the picklist only one can be selected.
Picklist(muliti)	:	From the picklist multiple values can be selected.
Person (single)	:	From the picklist only one person can be selected
Person (multi)	:	From the picklist multiple persons can be selected

When selecting a picklist, a new data field will appear named 'Picklists values' where you can specify the different values.

6. Then click **OK** and the field will be available at the specific page.

The screenshot below shows you a custom field to set the product quality after the quality review. It is a multi picklist with the values; --,-,0,+,++.

General Logs	Dependencies	Costs & Hours	Resource Demand					
Product: P	roject Initiat	ion Docume	nt (PID)				Save	Cancel
Name: Description: Owner Group Owner: Reviewer: Participants: Priority: Mandatory:	ן קיינגיי קיינגיי קיינגיי קיינגיי קיינגיי	roject Initiation Do roject Manager trik Aalbersberg	vument (PID)	Start: Craft: Checked: Final: Duration: Planning Status:	Planned date 26-Jul-2011 27-Jul-2011 27-Jul-2011	Actual	date]]]	
Product Qual Finance Total Actuals	ity:	· v · · · · · · · · · · · · · · · · · · ·						

A custom field (Product Quality) has been added to a product

Default the Principal Toolbox is configured with ten custom fields for each item. If you need extra custom fields these can be created with the **Add custom fields** button

Add Custom Field

Remember: To reset an existing custom field go to the edit page of the custom field -> Click **Edit'**-> Click **Advanced** and then hit the **Reset** button. When you are sure you want to reset the field click **OK**.

All values inserted by users will be deleted from the system and can not be retrieved !

6.2 Settings

In the middle of the 'Settings page' you can see the information of your current license. Underneath are options to alter the license key and the version type. On the left hand side of the page you see a list with subjects that point to the different settings pages.

We will review the most important subjects in this section:

- obtaining the license key and carrying out updates 161
- management of users 163

6.2.1 License key and carrying out updates

Under the heading License key on the Settings page you come across a number of options:

- Request license key 16h;
- Request additional user licenses 161;
- Renew expired license key 161;
- Enter license key 162;
- Update software 162

6.2.1.1 Applying for a license key

If you have carried out the installation yourself and then arrived at the 'Settings' page it is necessary to request for a license key at Fortes Solutions.

- 1. Go to the 'Settings' page.
- 2. Click the link Request license key.
- 3. Fill in the following information:

Customer Name	:	Company name
Purchase order	:	Code received in letter sent.
Machine ID	:	Filled in automatically.

4. By clicking the key **Create e-mail** a message or mail is made which you will need to send. Within one work day you will receive a license key from Fortes Solutions.

6.2.1.2 Request for additional user licenses

The license you received is based on the number of users named in the Principal Toolbox. If you have reached the maximum number of user licenses you cannot make any new users. With the option 'Request additional user licenses' you are able to increase the number of existing licenses.

- 1. Go to the 'Settings' page.
- 2. Click the link Request additional user licenses.
- 3. Fill in the following information :

Purchase order	:	Code received in the post or if your first request for more licenses you
		can fill in unknown or '-'.
New User Limit	:	Here you can fill in the number of users that you really need.

4. By clicking the key **Create e-mail** a mail is then made which you are required to send. As soon as the extra licenses are approved you will receive a new license key from Fortes Solutions.

6.2.1.3 Renewal of an outdated license key

If your license has expired you can request a new license using this option.

- 1. Go to the 'Settings' page.
- 2. Click the link Renew expired license key.
- 3. Fill in the following information:

- Purchase order : Code received in the post or if your first request for more licenses you can fill in unknown or '-'.
- 4. By clicking the **Create e-mail** key a mail will be made that you will need to send. Within one working day you will receive a new license key from Fortes Solutions.

6.2.1.4 Setting up the license key

After making a request for a license key in one of the ways shown above you will receive the necessary information by e-mail. This license key then needs to be activated in the Principal Toolbox.

- 1. Go to the 'Settings' page.
- 2. Click the link Enter License key.
- 3. Fill in the following information:
 - Name : Name of the organisation; Fill in the exact name as written in the e-mail.
 - Key : The license key from the e-mail.
- 4. Then click **OK** whereupon the license key will be activated. You will be required to restart system in which the Principal Toolbox runs, once again.

In some cases the Principal Toolbox will give an alert on the license page (main page of the Settings), ignore this alert and start up the system once more. If the alert continues then check again whether all information is filled in correctly.

6.2.1.5 Updating the software

Implementing updates and the installing of new releases of the Principal Toolbox is done via the '**Settings**' screen. You will receive a file in the form of a .jar or .sql file from Fortes Solutions in order to implement an update or to be able to install a new release.

Remember: Before starting the update we recommend to backup the database and application. Users should be informed of the update and should not be working on the system during the update.

- 1. Go to the 'Settings' page.
- 2. Click the link Update software.
- 3. Now click Start update procedure.
- 4. Log out all active users and click Proceed with step 2.
- 5. Wait while storing the unsaved data and select the checkbox in front of **Check when backup of** database has been performed.
- 6. Click the button Proceed with step 3.
- 7. Locate the appropriate file (.jar file or .sql file) using the **Browse** key.
- 8. Click the **Proceed with step 4** key in order to carry out the update.
- 9. After completion of the update, the update procedure restarts the Principal Toolbox application.
- 10.After the restart, log in as administrator and wait for update processes and the sanity check to finish. This can take time depending on the update and the size of the database.

11. The system is ready for use after completion of the update processes and the sanity check.

When problems or fault announcements arise please contact Fortes Solutions: support@fortes.nl.

6.2.2 User administration

Control of users of the Principal Toolbox runs via de Settings page. Using the link User Administration you are able to control the existing users and to add new users.

- 1. Go to the Settings page.
- 2. Click the link User Administration. A list of all users of the Principal Toolbox will appear.
- 3. Further click Add ir n
- 4. T р fil d

unner Ciick Add		-									
order to add a	Settings										
ew user.	Options	++	User Administration								
	License key and updates		System Users		Edit New	New named user	Edit Account Details	Remove Person	* All Users	•	View Options
	System status User Administration		Last Name 🌲	Initials	First Name	User Name	Email		Administrator	Extern	al Login
ne screen Add	Current activity		Aalbersberg	E	Erik	Erik	e.aalbersberg	@fortes.nl	V		
	 System Settings 		Administrator	S	Support	admin	support@fort	es.nl	×	-	
rson annears			Clarkson	J.	Jeremy	Jeremy	jclarkson@m	ail.com		-	
noon appears,			Cole	Ρ.	Peter	Peter	p.cole@fortes	s.nl		-	
in the following			Davies	S	Samuel	Davies	Davies@mail	.com		-	
in the following			Edwards	J.	John	Edwards	erik@fortes.n	1		~	
to:			Efflink	M.	Marco	Marco	info@efftinkc	onsulting.nl	\checkmark	-	
ild.			Hammond	R.	Richard	Richard	rhammond@	mail.com		-	

Firstname	:	First name of the user.
Initials	:	Initials of the user.
Lastname	:	Surname of the user.
Email	:	Users email.
Hour rate	:	Hour rate (optional). This hour rate is used in the add-on hours registration.
Username	:	User name
External (add-on)	:	Highlight if the user is an external supplier in the project. By doing this only the allocated products, issues, etc. are visible.
System Role	:	Normal User or Administrator. The administrator role has logically all rights. A normal user, has only the rights that are allowed depending on his/her permissions within the programmes and projects.
Remarks	:	User specific remarks to send within the e-mail.

5. Click **OK** in order to make a user in the system.

An email will be generated based on this information. When there is no mail server configured in the Principal Toolbox or there is no email address filled in during the creation of the new account, you are able to fill the email with the relevant information and then send this further to the user by yourself. Otherwise the Principal Toolbox will generate the email automatically and send this to the users email address.

In order to delete users or to change the current information you go to the **User Administration** page and by using the **Edit** and **Remove** buttons you are able to alter or remove information about a user.

Image: Section of the stage (Plain Text)	A:			
Internet production Pointar Letter Pointar Letter		Ver Principal Toolbox account - Message (Plain Lext)		
Tome Send Subject: Your Principal Toolbox account Dear Principal Toolbox user, Below is the (updated) information for your Principal Toolbox account. Please click on the link below to access the application and use the username and password to login. Application = https://demo3.principaltoolbox.com/ Username = Hans Password = 76-sim (To change your password, navigate to your 'Home Page' > 'My Details' and click 'Change Password')	Paste Clipboard	anter Opionis Foundater Active Address Address Active Address Active Address Active Address Active Attach	Follow Up * High Importance Low Importance Tags © Zoo	m
Dear Principal Toolbox user, Below is the (updated) information for your Principal Toolbox account. Please click on the link below to access the application and use the username and password to login. Application = https://demo3.principaltoolbox.com/ Username = Hans Password = d7-G:m (To change your password, navigate to your 'Home Page' > 'My Details' and click 'Change Password')	Send Subject:	Vour Principal Toolbox account		
Lear Innicipal Idolidox User, Period particular in the particular indication of a second control of the particular indication of the particular indication and use the username and password to login. Application = https://demo3.principaltoolbox.com/ Username = Hans Password = d7-6:m (To change your password, navigate to your 'Home Page' > 'My Details' and click 'Change Password')	Description of the	- 11		C3

6.2.2.1 Person details

Besides the basic information for the user login there is an option to add detailed information per user/resource.

- 1. Go to the 'Settings' page.
- 2. Click the link User Administration. A list of all users of the Principal Toolbox will appear.
- 3. Click a specific user/resource to add the detailed information.
- 4. Now click Edit to insert the following information:

Company	:	Name of the company.
Address	:	Address of the company.
ZiP/Postal Code	:	ZIP/Postal Code.
City	:	City where the office is located.
Country	:	Country where the office is located
Phone	:	Office phone number.
Phone (home)	:	Private home phone number.
Fax	:	Fax number.
Mobile	:	Mobile phone number.
Birthdate	:	Date of birth.
Gender	:	Male or female.
Remarks	:	Any remarks.
Calendar	:	Calendars applicable to the user

Person details				Save	Cano
First Name:	Peter	User Name:	Peter		
Initials:	P.	Password last changed	31-May-2010		
Last Name:	Cole	on: Administrator:			
Email:	p.cole@fortes.nl	External:	-		
Login disabled:		Default Hour Rate:	Rate 120.0		
Company:					
Address:					
ZIP/Postal Code:					
City:					
Country:					
Phone:					
Phone (home):					
Mobile:					
Fax:					
Birthdate:					
Gender:		•			
Remarks:		•			

Person details

6.2.2.2 Advanced options

The administrator has rights to modify advanced options for the login policy. There are several security settings possible for the password.

Go to the Settings page and navigate to System settings > User login settings

			Edit		
Jser administration settings					
ustomize the following settings by clic o save any changes, click 'OK' or click	king on the edit button. 'Cancel' to return to the current settings.				
ettings					
	Value				
.ogin type 🚯	Principal Toolbox authentication (Form Login)				
Aultiple user domains 🚯	No				
assword expiry time in days ('0' is no expiry)	0				
Maximum incorrect login attempts ('0' is nfinite)	3				
_ockout duration ('0' is infinite) 🚯	15				
Inimal password length	6				
Aix upper and lower case letters in basswords	Yes				
Jse special symbols in passwords 🚯	No				
Jse numbers in passwords 🚯	Yes				
Allow users to reset their password 🕒	Yes	(Custom)			

User login settings

These settings can be changed:

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Password expiry time in days	:	This is the time (in days) a password is valid. After this date the user has to enter a new pasword. ('0' is no expiry)
Maximum incorrect attempts	:	Number of login attempts before a user account is locked. ('0' is infinite)
Lockout duration	:	Number of minutes a user account stays locked. ('0' is infinite, the administrator can reset a locked account.)
Minimal password length	:	The number of characters a password should consist of.
Mix upper en lower case letters	:	Enforce the user of both upper and lower case letters.
Use special symbols in passwords	:	Enforce the use of symbols (non alphanumeric) in each password, like @, &
User numbers in passwords	:	Enforce the use of numbers in a password.

The administrator is able to reset an account. When an account is reset a new password is created by the system.

Go the User Administration and open the account to reset.

Email:	p.cole@fortes.nl
User Name: *	Peter
Reset Password:	

Password reset

6.2.3 System Settings

Note: this section is only relevant to system administrators.

This is an overview of the advanced system settings. Normally spoken these do not need to be changed. Some of these settings will only be shown when add-on's are activated.

Page	Link	Setting	Standard value	Remarks
System settin	gs		-	
		Document storage location	Location chosen during installation	All documents within the Principal Toolbox are saved and coded here
		Default system locale	English	Default language settings for the all users. Users can a personal language if setting 'Personal locale' is set to yes .
		First week of the year	Week that contains a minimum of 4 days in January (ISO)	Configure week numbering.
		Personal locale	No	Users can a personal language if setting 'Personal locale' is set to yes .
		Link to Document Management System	-empty-	Specify a URL to a external location which is used to add a external document link.
		Application location	-default value-	Only change when problems.
		Garbage collector	Yes	By normal use, keep the standard values.
		Debug	No	By normal use, keep the standard values.
		Max file size	90 Mb	By normal use, keep the standard values.
		Person display name	Lastname, initials	Modify if necessary
		URL prefix static files	-default value-	
		Number of currency decimals	2	Number of displayed decimals for all currency values.
	User Login settings	Login type	Basic	Change if one works with IIS.
		Multiple domains	No	
		More settings: See <u>User administration ></u> Advanced options 165		
	Mail	SMTP Server		Specify the SMTP server for sending email
		System address		from-address used for emails automatically sent by Principal Toolbox, for example notifications.
		Fixed from-address		Fill in a fixed from address which is used instead of the users email address when sending email from Principal Toolbox
		Fixed reply-to address		only specify when all mails sent should be replied to one email address
	LDAP settings			all settings and field mappings for LDAP synchronisation. Contact <u>support@fortes.nl</u> for more information about LDAP synchronizationand Single-sign-on options

7 Troubleshooting and Solutions

7.1 Troubleshooting

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Sort	Issue	Solution				
Login	Login					
	Internet Explorer window stays blanc or Principal Toolbox logo hangs after login.	On the Tools menu, click Internet Options . Open the Security tab and click the Custom level button. In the Miscellaneous section, set Allow META REFRESH to enabled.				
	Single Sign On is enabled, but Internet Explorer ask user credentials when opening the Principal Toolbox.	On the Tools menu, click Internet Options . Open the Security tab and click the Custom level button. In the User Authentication section, check the setting Logon and adjust to the significant value.				
	Can't login into the application because the login button doesn't work at all.	On the Tools menu, click Internet Options . Open the Security tab and click the Custom level button. In the Scripting section, set Active scripting to enabled.				
Automated	d reports and document downloading and uploading					
	Automated reports and documents can't be downloaded.	On the Tools menu, click Internet Options . Open the Security tab and click the Custom level button. In the Downloads section, set File download to enabled.				
	Keywords for automatic reports won't be copied to the clipboard.	On the Tools menu, click Internet Options . Open the Security tab and click the Custom level button. In the Scripting section, set Allow Programmatic clipboard access to enabled.				
	There are noPrincipal Toolbox reporting toolbars in the Excel template available.	Make sure you have saved the file before opening. On the Tools menu, click Macro > Security . When the Security dialog is opened, click the tab Security Level and set the security level to Medium . Re-open the Excel template. Excel should ask to accept to run macros.				
	Nothing happens when the Save list as RTF button is clicked	On the Tools menu, click Internet Options . Open the Security tab and click the Custom level button. In the Downloads section, set File download to enabled.				
Edit Proje	ct Plan					
	Drag and drop in Edit Project Plan window won't work.	On the Tools menu, click Internet Options . Open the Security tab and click the Custom level button. In the Scripting section, set Active scripting to enabled.				
	Internet Explorer blocks a pop-up after adding the first product on the Edit project plan page.	On the Tools menu, click Internet Options . Open the Security tab and click the Custom level button. In the Miscellaneous section, set Use Pop-up Blocker to disabled (make sure there are no other Pop-up blockers active).				
	The Edit Project Plan window hangs while message "Processing please wait" is displayed.	On the Tools menu, click Internet Options . Open the Security tab and click the Custom level button. In the ActiveX controls and plug-ins section, set Script ActiveX controls marked safe for scripting to enabled (make sure there is no other script blocking software active).				
Gantt cha	tt chart editing					
	Can't drag bars in edit Gantt dialog.	On the Tools menu, click Internet Options . Open the Security tab and click the Custom level button. In the Scripting section, set Active scripting to enabled.				
Miscellane	eous					
	Internet Explorer reports Script errors on different pages.	On the Tools menu, click Internet Options . Open the Security tab and click the Custom level button. In the ActiveX controls and plug-ins section, set Initialize and script ActiveX controls not marked as safe for scripting enabled				
	Links to projects and programmes on the homepage doesn't work.	On the Tools menu, click Internet Options . Open the Security tab and click the Custom level button. In the Scripting section, set Active scripting to enabled.				
	Pack Project Offline window hangs while message "Processing please wait" is displayed.	On the Tools menu, click Internet Options . Open the Security tab and click the Custom level button. In the Downloads section, set Automatic prompting for file downloads to enabled.				
	No pop-up windows are opening while clicking links.	On the Tools menu, click Internet Options . Open the Security tab and click the Custom level button. In the Miscellaneous section, set Use Pop-up Blocker to disabled (make sure there are no other Pop-up blockers active).				

Sort	Issue	Solution
	Can't download the MS Project Client add-in.	On the Tools menu, click Internet Options . Open the Security tab and click the Custom level button. In the Miscellaneous section, set Launching applications and unsafe files to enabled.
	Functions in drop down menus won't work.	On the Tools menu, click Internet Options . Open the Security tab and click the Custom level button. In the Scripting section, set Active scripting to enabled.

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